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Overview

Completion of the Communication and Consultation Preference details will generate text (SMS) confirmations for appointments and ensure we communicate with Clients using their preferred method.

Recording Communication Preferences

- Click Menu
- Click Quick Menu
- Click Client's View

Locate the **Demographics** pane.

The **red** text indicates that the consent form has not yet been recorded.

• Click Patient Communication Preferences link

If a form has previously been completed, the Add button would allow you to create a new form.

• Enter the **Date/Time** (mandatory)

Complete the **SMS OPT IN/ OUT** section. If the mobile number or email address are not visible or are incorrect you will need to record the details.

• Click **Update patient's email address and mobile number** link

The Client Contacts screen opens in a new window







Recording a Mobile Telephone Number

- Click Add New Telecom (bottom)
- Method: Telephone Number
- Context: Mobile Device
- Contact Details: Type Number
- Enter Valid From date
- Click Save

The new mobile number will display

The mobile telephone number will not display on the Patient Communication Preference screen until the form has been completed and saved.

Recording an Email Address

• Click Update patient's email address and mobile number link

The Client Contacts screen opens in a new window

- Click Add New Telecom
- Method: Email address
- Context: Communication address at home
- Contact Details: Type email address
- Enter Valid From date
- Click Save

The new email address will display

Click the cross (top right) to close the window

The email address will not display on the Patient Communication Preference screen until the form has been completed and saved.

- Click I have verified the patient's email address and telephone number check box
- Click Save
- Click the <u>Client's name</u> link in the banner bar to return to the Clinical Portal

The Mobile Telephone Number, SMS Consent Given (in green text) and Client Email are now visible in the Demographics pane.





Email address

23 July 2021

TestT49@gmail.com

Communication address at home



Method

Context

Contact Details

Valid From

Valid To

~

~

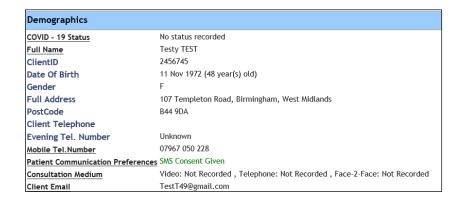


Recording Consultation Preferences

Our clients can now confirm which method of communication they prefer for their appointments with our Clinicians. This too, is documented on the Patient Communication Preferences form.

- Click Menu
- Click Quick Menu
- Click Client's View

Locate the **Demographics** pane.



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Click Consultation Medium

The Patient Communication Preferences screen displays

- Click Add (bottom)
- Enter the Date/Time (mandatory)

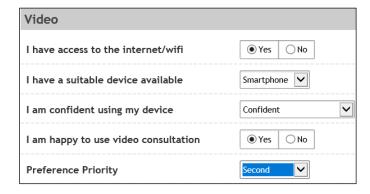
Scroll to the Consultation Preferences and complete each section as required

Video

• Indicate if the Client has access to internet/wifi or not

If Yes ⊙:

- I have access to the internet/wifi
- I have a suitable device available
 Select device
- I am confident using my device
 Select response
- I am happy to use video consultation
- Preference Priority
 Select as required







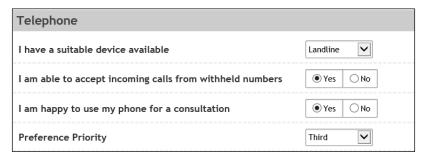
Telephone

I have a suitable device available
 Select device

I am able to accept incoming calls from withheld numbers

I am happy to use my mobile for consultation

Preference Priority
 Select as required



Face-to-Face

I would travel in by
 Select as required

I have difficulty getting time off work for apts
 Select response

I am happy to attend face to face appointments

Preference Priority
 Select as required

• Click Save



The Consultation Mediums are now recorded and display in the Demographics area of the Clinical Portal



