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Overview

Completion of the Patient Communication Preferences form records a multitude of useful data. It will generate text (SMS) confirmations for appointments, identify sensitive information regarding name changes and ensures we consider our patient's preferences.

Recording Communication Preferences

- Select Menu
- Select Quick Menu
- Select Client's View

Locate the **Demographics** pane.

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

Demographics		
COVID - 19 Status	No status recorded	4
Full Name	Billy BALL	-1
ClientID	2773633	-1
Date Of Birth	14 Nov 1997 (26 year(s) old)	-1
Gender	M	-1
Full Address	100, Birdbrook Road, Birmingham, West Midlands	1
PostCode	B44 8RE	
Client Telephone		
Evening Tel. Number	Unknown	
Mobile Tel.Number	Unknown	
Patient Communication Preferen	ces SMS Consent Not Recorded Research Consent Implied	
Consultation Medium		
Client Email		-

• Select the **Patient Communication Preferences** link

If the Client does not have a previously completed form a blank form will display. If a form has previously been completed, the Add button would allow you to create a new form.

- Enter the **Date/Time** (mandatory) (This auto populates to Today's date)
- Enter Completed by

You will see the Contact Details display with the known patient demographics



Method

Context

Contact Details

Valid From

Valid To



Moving to the **Text Reminders (SMS Consent)** section, you can now complete whether the Client has given their consent to receive text message reminders for their appointments.

 Has patient consented to receiving SMS appointment notification and reminder? - Select as required

If there is no data recorded for the Client Mobile/Email it is important to record this information now.



Telephone number

Mobile device

07967040119

23 October 2024

 Select <u>Change patient's email address and mobile</u> <u>number</u>

This will prompt the Client Communications sub form to display

- Select to maximise the form
- Select Edit this Client
- Select
 Add New Telecom

Complete **Method**, **Context**, **Contact Details** & **Valid From** (Mandatory)

• Select Save

Repeat for email address if required

Select to close the sub form

Note the Client Mobile/Email still displays (no data) this will update once the form is saved

- Place a Tick in I have verified patient's email address and mobile number tick box
- Complete Contact for Patient Feedback and Contact for Research/Audit (as required)

Video Appointments

• I am Happy to use video consultation - Select as required

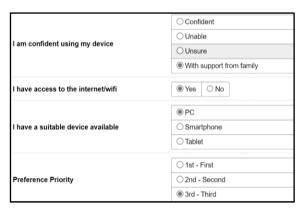


i i

If **No** is selected you can move onto the next section.

If **Yes** is selected this opens further options for you to complete according to the information given by the Client.

Complete as required







Telephone Appointments

• I am Happy to use my phone for a consultation - Select as required



If **No** is selected you can move onto the next section.

If **Yes** is selected this opens further options for you to complete according to the information given

by the Client

Complete as required



Face to Face Appointments

• I am Happy to attend F2F appointment - Select as required

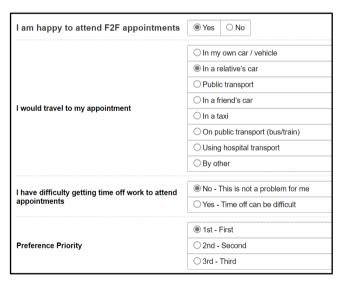
Yes	○ No
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If **No** is selected you can move onto the next section.

If **Yes** is selected this opens further options for you to complete according to the information given

by the Client

Complete as required



First Language/Need for Interpreter

This section should be completed if an interpreter is required to be present at the appointment. The <u>Change other languages spoken</u> and the <u>Change First Language/Interpreter</u>

<u>Requirement</u> links to sub forms are available if required

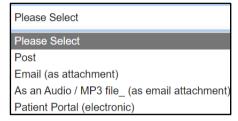




Letters/Correspondence Options

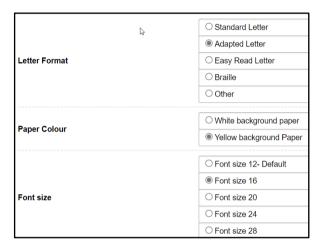
This is a new development and may not be available to your service. However, if you do have this functionality set up then it will ensure that any written correspondence displays in a format that suits the needs of the Client and is delivered by their preferred option

Letters to be sent by - Select as required



There are a variety of **Letter options** for you to choose from

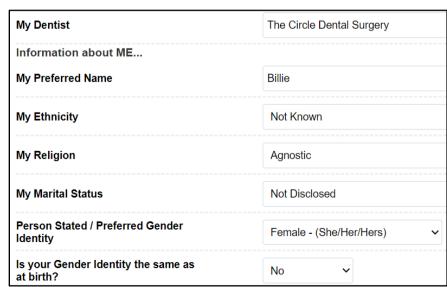
Complete as required



Client Recorded Additional Information

This section is to be completed if applicable to the Client and comprises of some sensitive information which is extremely important to the Client. E.g. Preferred Name, Preferred Gender Identity

- Select My Dentist text box to enter this information if required
- Select My Preferred Name text box to enter the information if required
- My Ethnicity Select if required
- My Religion Select if required
- My Marital status Select if required
- Person Stated/Preferred Gender Identity - Select if required
- Is your Gender Identity the same as at birth - Select if required







Military Service

This is the option to record if the Client or a member of their family have served in the Armed Forces.

• Have you served in the armed forces? - Select if required



• Have you or anyone in your immediate family ever served in the Armed

Forces? - Select if required

There are 2 further links to sub forms where you can **Change protected characteristics** and **Change Dentist** if this is required for your Client

Save the Completed Form

• Select Save

Once you have 4 blue buttons at the foot of the form, the form is saved. You can then return to the Clinical Portal Client's View screen

• Select Client's Name (on grey banner bar)

Demographics		Ì
COVID - 19 Status	No status recorded	<u> </u>
Full Name	Billy BALL	- 1
ClientID	2773633	- 1
Date Of Birth	14 Nov 1997 (26 year(s) old)	- 1
Gender	M	- 1
Full Address	100, Birdbrook Road, Birmingham, West Midlands	- 1
PostCode	B44 8RE	- 1
Client Telephone		•
Evening Tel. Number	Unknown	
Mobile Tel.Number	07967040119	
Patient Communication Preferen	nces SMS Consent Given Research Consent Implied	
Consultation Medium	Video: Yes , Telephone: Yes , Face-2-Face: Yes	
Client Email		

The Demographics pane now displays the Patient Communication Preferences in green showing that SMS Consent is Given and Research Consent Implied. Clinicians can also see the Client's Preferred Consultation Medium immediately.

