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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.

Demographics

COVID - 19 Status

Date Of Birth

Client Telephone Evening Tel. Number

Mobile Tel.Number

Full Name

ClientID

Gender Full Address

PostCode

No status recorded Testy TEST

11 Nov 1972 (48 year(s) old)

107 Templeton Road, Birmingham, West Midlands

2456745

B44 9DA

Unknown

Unknown

Patient Communication Preferences SMS Consent Not Recorded

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 (left of screen)

The Client Communications screen opens in a new window



Healthy Communities



Recording a Mobile Telephone Number

- Click **Edit this Client** (bottom of the screen)
- Click Add New Telecom (bottom of the screen)
- Method: Telephone Number
- Context: Mobile Device
- Contact Details: Type Number
- Enter Valid From date
- Click Save to local and national

The new mobile number will display

• Click the **Cross** (top right) to close the window

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

• Click Save

Recording an Email Address

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

The **Client Communications** screen opens in a new window

- Click **Edit this Client** (bottom of the screen)
- Click Add New Telecom (bottom of the screen)
- Method: Email address
- Context: Communication address at home
- Contact Details: Type email address
- Enter Valid From date
- Click Save to local and national

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.

Method

Context

Contact Details

Valid From

Valid To

Click Save



Email address

TestT49@gmail.com

23 July 2021

Communication address at home

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Click the **Client's name** 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.

Demographics	
COVID - 19 Status	No status recorded
Full Name	Testy TEST
Mobile Tel.Number	07967 050 228
Patient Communication Preferences	SMS Consent Given
Consultation Medium	Video: Not Recorded , Telephone:
Client Email	TestT49@gmail.com





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)

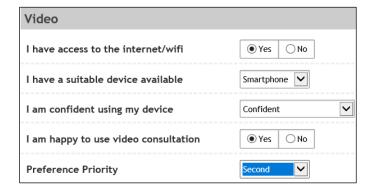
Scroll to the Consultation Preferences and complete each section as required

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







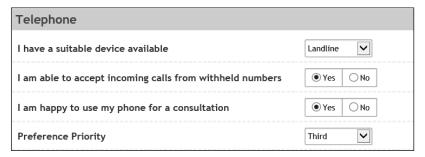
Telephone

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



• Click the Client's name link in the banner bar to return to the Clinical Portal

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



