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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.

Demographics	
COVID - 19 Status	No status recorded
Full Name	Testy TEST
ClientID	2456745
Date Of Birth	11 Nov 1972 (48 year(s) old)
Gender	F
Full Address	107 Templeton Road, Birmingham, West Midlands
PostCode	B44 9DA
Client Telephone	
Evening Tel. Number	Unknown
Mobile Tel. Number	Unknown
Patient Communication Preferences	SMS Consent Not 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



## 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.

- Click **Save**



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	
<u>COVID - 19 Status</u>	No status recorded
<u>Full Name</u>	Testy TEST
<u>Mobile Tel.Number</u>	07967 050 228
<u>Patient Communication Preferences</u>	SMS Consent Given
<u>Consultation Medium</u>	Video: Not Recorded , Telephone:
<u>Client Email</u>	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.

Demographics	
COVID - 19 Status	No status recorded
Full Name	Testy TEST
ClientID	2456745
Date Of Birth	11 Nov 1972 (48 year(s) old)
Gender	F
Full Address	107 Templeton Road, Birmingham, West Midlands
PostCode	B44 9DA
Client Telephone	
Evening Tel. Number	Unknown
Mobile Tel. Number	07967 050 228
Patient Communication Preferences	SMS Consent Given
Consultation Medium	Video: Not Recorded , Telephone: Not Recorded , Face-2-Face: Not Recorded
Client Email	TestT49@gmail.com

- 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

Video	
I have access to the internet/wifi	<input checked="" type="radio"/> Yes <input type="radio"/> No
I have a suitable device available	Smartphone <input type="text"/>
I am confident using my device	Confident <input type="text"/>
I am happy to use video consultation	<input checked="" type="radio"/> Yes <input type="radio"/> No
Preference Priority	Second <input type="text"/>



## 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

Telephone	
I have a suitable device available	Landline <input type="button" value="v"/>
I am able to accept incoming calls from withheld numbers	<input checked="" type="radio"/> Yes <input type="radio"/> No
I am happy to use my phone for a consultation	<input checked="" type="radio"/> Yes <input type="radio"/> No
Preference Priority	Third <input type="button" value="v"/>

## 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**

Face-2-Face	
I would travel in/by	Taxi <input type="button" value="v"/>
I have difficulty getting time off work to attend apts	No - this is not a problem for me <input type="button" value="v"/>
I am happy to attend F2F appointments	<input checked="" type="radio"/> Yes <input type="radio"/> No
Preference Priority	First <input type="button" value="v"/>

- 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

Demographics	
<b>COVID - 19 Status</b>	No status recorded
<b>Full Name</b>	Testy TEST
<b>ClientID</b>	2456745
<b>Date Of Birth</b>	11 Nov 1972 (48 year(s) old)
<b>Gender</b>	F
<b>Full Address</b>	107 Templeton Road, Birmingham, West Midlands
<b>PostCode</b>	B44 9DA
<b>Client Telephone</b>	
<b>Evening Tel. Number</b>	Unknown
<b>Mobile Tel. Number</b>	07967 050 228
<b>Patient Communication Preferences</b>	SMS Consent Given
<b>Consultation Medium</b>	Video: Yes , Telephone: Yes , Face-2-Face: Yes