DRAMeRS

Instructions for sending Patient Information on Exact





Make sure that the documents to be included as attachments have been saved **to the PC that you are working from** – not somewhere else on the network. Here, they are saved to the desktop.

Yours will obviously be called "Patient Information Sheet" etc.

EXACT Professional < UKV File View Transaction	VCE01> - [Ms Susan Bailey - DOB: 23/0 ns Administration Configure Win Reports ts Statement Run	3/1956 Age: 66y 0m] ndow Help	t Messa Reports	SMS Replies	Cork EXACT Contact	ists Care Manager	Email	NHS .
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In Exact, access your list of contacts by opening the Administration drop-down, then selecting "Contact Lists"

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Date	Time	Description	Patients	# Complete						% Co	mplete
30/08/2021	14:25	NHS Patients	13307	0							0
17/09/2021	15:00	NHS Registered Adults past 3 years	3812	0							0
17/09/2021	15:02	NHS Registered Adults past 3 years EMAIL	3144	0							0
17/09/2021	15:03	NHS Registered Adults past 3 years SMS	89	0							0
21/10/2021	08:31	April Cancelled Exams	261	0							0
01/11/2021	10:41	BC W/c 1/11/21									
01/11/2021	17:30	BC W/C 8/11/21	26	0							0
08/11/2021	09:29	New March2020	187	183							97
04/01/2022	11:08	LG January Appointments	68	3							4
04/01/2022	11:10	GQ Jan	11	0							0
27/03/2022	14:08	SL Covid Cancel	19	0							0
01/04/2022	08:17	BC Kids March	3	0							0

This will take you to any contact lists that have already been created. To create a new list click "Create List" at the lower right of the screen, as highlighted above.

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OK Cancel	OK Cancel	OK Cancel		
				OK Cancel
		N		

Clicking the menu button circled above will allow you to select your email template created at the setting up stage.

S Registered Adults	past 3 years SMS	Select Patients	
I Cancelled Exams	View Query Templates		
V/c 1/11/21	Description	^	
/C 0/11/21	* Exams cancelled and ETA'd COVI	D/-	
anuary Appointme	*Exams Cacelled due to COVID		
an	<26 open COT		
Covid Cancel	All Future Apps		
Kids March	Appts booked in April		
	BC Project		
	Cancelled Exams		
	CHILDSMILE		
	Completed H30		
	COVID Adult Recalls		
	Covid Recalls Emails		
	Covid Recalls Letter no SMS no em	ail	
	Covid Recalls SMS no Email		
	Debt List		
	Debtors List without CONV		
	Denplan PTs		
	Dentist & Hygienist Recall		
	Dentist Only Recall		
	DPAS		×
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You may have called this e.g. "DRAMeRS" or a name that makes sense to you. In the examples shown, it is called "BC Project"



Select your email template, and then in the box marked "Description" enter a name of your choice. In the example shown, the description indicates the date of the week commencing when the relevant patients' appointments are scheduled for.

rteip	erren Inter - C:
Tasks in it 3 years it 3 years EMAIL it 3 years SMS	Patients # Complete 13307 0 Create Contact List Calendar View Patients With: Any appointment: From Date 2 To Date 2 Treatment Codes Provider Under Exited Exite
	OK Cancel

Enter the appointment dates for which you want to send out the message. Depending on how many patients you have booked in, and whether you intend to repeat the process each week etc, you can select dates "to" and "from". These dates are inclusive, and so patients booked in on the first and last dates will receive the message, as will all those in between.



Leave the check boxes for failed and cancelled appointments UN-TICKED. Click OK.

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istered Adults past 3 years	3812	0	
istered Adults past 3 years EMAIL	3144	0	
istered Adults past 3 years SMS	89	0	
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/11/21			
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Cancel			
March	-		
		Cancel	

This will generate a contact list. It may take a while if you are not on the server computer.

Once completed, click "Yes" to view the list.

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Edit Patient 🗜 🖨 🖹 🗟 🛸 🚮 😭 💦 💷
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A list will appear, and at the bottom right of the screen, contact options will be displayed. Click the email button as shown.



Leave "Multiple email" checked.

If you want to have names disappear from the list once they have been contacted, check "Tick as completed when emailed". This is probably advisable to avoid duplicate messages.

Another screen will appear which will allow you to limit the people who are to be contacted. You can click "OK" to include everyone, or use this to exclude people from the trial if they don't meet the criteria.

Sense o Fromes una operante in provi entrali mun une parteria containa
merge rields that need to be replaced with their details.
Provider
Specialist
Email the selected Specialist
Email Template
Category Allocated Payments
Description
Include Final Scenature
Document Templates
+ Consents
T EasyPost Cover Sneets
+ Handouts
+ Patient Questionnaires
 No Preview Available
+ Sedation
- No Category
2nd Offer
A4 Black Template
AS Diak Template
A share the second se
OK Cancel
BC
BC
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Click the menu button (circled above) to open your email templates.

NHS EXAMS	WCDP NHS Update	Practice
NHS UPDATE	Dental Practice Update	Practice
OBAPPCON	[Patient.Firstname], your appointment has been booked!	Practice
OBPLANNED	[Patient.Firstname] book your Planned Treatment	Practice
OBR1	Book your visit with [Practice.Name] online now!	Practice
OBR2	[Practice.Name] hasn't seen you in a while, book online	Practice
OBR3	[Practice.Name] misses you, book your appointment online	Practice
PLAN UPDATE	Book in NOW for your check-up!	Practice
PORTAL REMINDER	Appointment Reminder	Practice
PRIVATE UPDATE	Book in NOW for your check-up!	Practice
R1	Book your visit with [practice.name] now!	Practice
R2	[practice.name] hasn't seen you in a while, book now	Practice
RESEARCH BC	Research invitation: Screening for diabetes in dental practice	Practice
°CV Backlog	Let's get you sorted!	Online
+CM_OLB_EMAIL	Care Manager - Booking Request	Practice
	OK Cancel	

Select the relevant template from the list



Click OK



Click "Attach" to browse to the relevant documents. As above, this will either be the welcome message and the patient information sheet, or only the latter if your email contains the text of the welcome message already

		-
	Attachment Picker	
865 91 560	Select Patient	
245 795 552 501 595	Please select a patient whose data you would like to attach to this email, or leave the field blank to attach generic items.	
288 827 590	Patient	
286 432 '3		
445 101 302		
480 956 755		
490 D00 297 245	Click Next >' to start.	
255 701	Pl EXACT Professional <ukwce01> - [Contact List WC 2/5/ I 22]</ukwce01>	
		_

Click "Next"



Browse to the document)s) you wish to attach.

NB: Exact may default to allowing only pictures to be attached, so when browsing for the attachments, remember to select "All files" rather than just "Images" when browsing for the attachment in Windows.



Select the relevant document(s)



Click "Finish"