

## NEW FEATURES AVAILABLE IN IN Vi4

==== BUILD 4006== Vi3/PB12 =====

### ENHANCEMENT: eForms – Guest User Forms

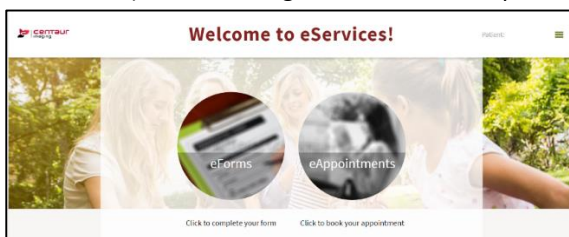
An enhancement has been introduced in eForms which enables patients to fill in an eForm at the practice without having to create an account in the online portal.

#### At the online portal level:

- Centaur Software will setup a 'Guest User' account that is separate to the existing 'Practice Administrator' account for someone at the practice, this will allow them to have access to the 'Guest User Forms'. We suggest the 'Guest User' is the person who is at the reception the most and who is handing out a tablet for patients to fill in eForms.
- A mobile number and password is required to setup a 'Guest User'.
- More than 1 user can be assigned the role 'Guest User'.

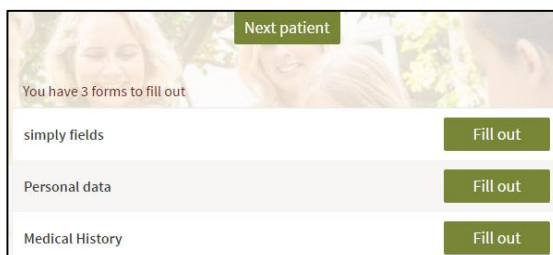
#### At the practice:

1. When the 'Guest User' logs in with their mobile number (or the mobile number they used to create the account), the following screen will come up:

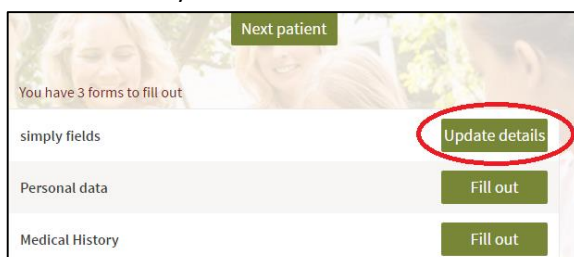


2. When clicking on 'eForms' the 'Guest User' will have access to the eForms available at the practice and will be able to:

- Click on the desired eForm for the patient to fill in, and
- Hand the device over to the patient so that they can start filling in their eForms.



3. Once a patient has finished filling in the required eForm and has clicked on 'submit' they can review the information they submitted and make corrections if they made a mistake by clicking on 'update details'.



4. When the patient has completed filling in their form, click on 'Next patient'. If 'Next patient' is not clicked, a completed form can be re-accessed, potentially by a different patient.
5. The process of retrieving eForms in D4W/PSS remains the same as per with registered users.

#### **ENHANCEMENT: eServices to D4W/PSS Patient Synchronization rules improvement**

- For practice using 'Families' to schedule consecutive & simultaneous appointments for patients of the same family; the Family structure in D4W/PSS (Family head and family members) is not changed, even when eServices family structure is different.
- Only empty D4W/PSS fields are updated when an eServices patient is synchronised.

#### Family Members and Families in D4W/PSS:

- When members of the one family, in D4W/PPSS, decide to create separate accounts in eServices for each family member, the existing family structure in D4W/PSS will remain unchanged. Previously, when existing members of a family in D4W/PSS decided to create separate accounts in eServices the family would be separated after the synchronization had occurred, so a previous 'family member' would be made a 'family head' causing the family structure to break.
- When a patient (P1) creates a user for a family member in eServices (using the menu option 'Family Members'),
  - And such patient is new to D4W/PSS
  - Then, after the synchronization occurs, a new family member will be created in D4W/PPS under the same 'family head' as patient P1.



- When a patient P1 creates a user for a family member in eServices P2 (using the menu option 'Family Members'),
  - And P2 is an existing 'family head' in D4W/PSS of family F2,
  - Then, after the synchronization occurs, P2 in eServices is matched to P2 in D4W/PSS, and P2 continues being the 'family head' of its own family in D4W/PSS. Therefore, F2 remains unchanged.

Successful patient matching will occur providing that the following fields have an exact match (non-case sensitive) between D4W/PSS and eServices:

- First name
- Last name
- Mobile number

In addition, when an existing D4W/PSS patient creates an account in eServices, and email and DOB are empty in D4W/PSS, and:

- Synchronization and successful matching occurs,
- Then, DOB and email fields, in D4W/PSS, will be populated with information from eServices.

#### Using 'Family members'

The eServices feature 'Family members', allows users to add members of their family to their eServices account, so that the main user can book eAppointments or fill in eForms on behalf of those family members.

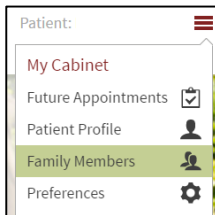
This feature allows dependents or family members who don't have a mobile number to use eAppointments and eForms.

Adding a family member in eServices:

1. The patient must sign into their eServices account.
2. They must click on the main menu on the top right of the screen.



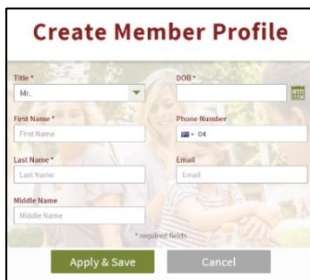
3. Then, select 'Family members'.



4. Then, click on 'Add a new member'.

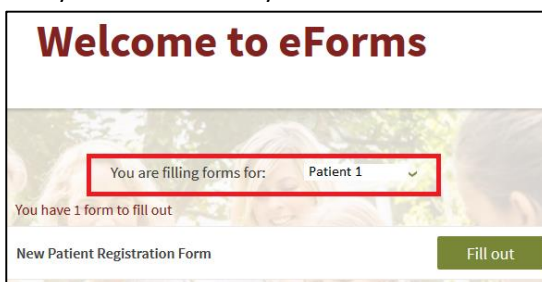
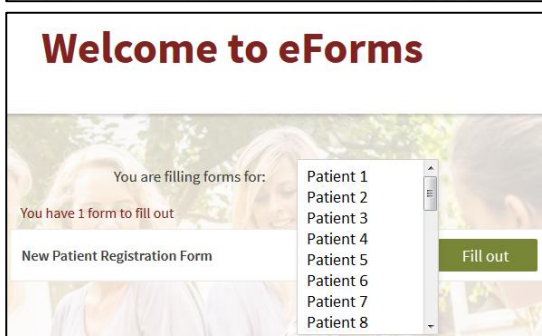


5. And complete the required information.



Completing an eForm for a family member:

1. The patient logs into eForms.
2. They will land on the below screen of eForms, where they can select from the drop down menu the family member who they wish to fill in an eForm for.

3. Then, click on 'Fill out'

# NEW FEATURES AVAILABLE IN WEB STABLE 27

## eFORMS

### **NEW: Allow electronic signature to be added directly to the form**

A new feature has been introduced in eForms to allow patients to sign an eForm using their finger, by drawing their signature on a tablet as they are completing their form. Additionally, the patient can use their mouse/cursor to draw their signature when using a desktop to complete an eForm.

In order for practices to use this feature, they will need to 'Add field' = 'Patient signature' when they are building eForms in Form Manager.

The 'Patient signature' field is a 'text area' field that contains a canvas inside, this canvas will allow patients to draw their signature whilst completing their form.

### **ENHANCEMENT: Registration and password recovery SMS and email changes**

An enhancement has been made to:

- eServices registration SMS to patients
  - Previous SMS – From YourDental: Welcome to eAppointments! Your confirmation code is \$code.
  - New SMS – From YourPractice: Welcome to eServices! Your confirmation code is \$code
- eServices recovery password email to patients
  - Previous email – Subject: Password Recovery for eAppointments
  - New email – Subject: Password Recovery for eServices

### **ENHANCEMENT: DOB field in eServices: Functionality added to type DOB directly into field**

An enhancement has been introduced in eServices whereby users can now type their DOB directly into the 'DOB field' when:

- They edit their patient profile in the eServices portal.
- When they are signing up to the eServices portal.