

Denticon - Basic Clerical

How to Email or Text a Patient Using Denticon

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Set Patient Communication Preferences

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Step 1

On the 'Patient Overview' screen, click **Edit** in the Patient ID section.

Step 2

Use the 'Preferred Contact Method' dropdown to make a selection before clicking **Save**. Note: Ensure email addresses and phone numbers are correct for successful communication. Note: To opt a patient out of a specific communication method, check the relevant box in the **Patient Status** section, then click **Save**.

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Communication preferences have now been updated.

Email or Text a Patient

Step 1

Click **Patient** in the toolbar, then select **Email Or Text Message**.

Step 2

Check the Email or Text Message radio button.

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Step 3

Type your message and either click **Send** now, or if you need to add a Consent Request or Notes Macro, follow Steps 4-8.

Step 4

Click **Add Consent Request** and choose the correct consent letter from the dropdown menu.

Email or Text Message Patient: Adams, Aaron (H): BD: 4/19/1984 (C): 949-401-6434 ID: 145 (W):	Type Age/Sex: 36 / M First Visit: Last Visit:	Respo Balanc Est Ins Est Pat	oorfs • Utilities • Setup • Of Ce Smile Solutions [100] ▼ P P P P P P P P P P P P P P P P P P P	Help • My Search Patier Responsible: Balance: 0.00
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Note: Editing the e-Sign URL manually may create faulty consent r	aquest.			
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Step 5

To attach the consent form to your email or text, click **Add e-Sign URL**.

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Step 6

To add a note template, click **Add Notes Macro** and select the **Category**, followed by the correct **Macro** from the dropdown menu.

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Step 7

Click **Add Note** to attach the note macro to the email or text.

Note: Amend the note to personalize the message to the patient. Keep in mind that when using text there is a character limit.

Add Notes Macro	
	Mage Description
elect Macro edation Reminder pdated Med History	v Your Destal Surgery appointment is scheduled for tomorrow morning at am. You have elected to have sedation during this visit; please remember to have someon drive you to and from your dental appointment. Please DO NOT eat or drink anything after 10:00 pm this evening. Small amounts of water are allowed until 2 ho before arriving at the office. Please contact the office if you have any questions. We are looking forward to seeing you tomorrow. Smile Solutions Team
Note: Editing the e-Sign URL manually m	Add Note
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	Add Consent Request Add Notes Macro Send Cancel

Step 8

Click Send.

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iil or Text	Message Patio (H) : (C) : (W)	ent: Adams, 949-401-64	Aaron BD : 4/1 34 ID : 145	19/1984				Туре	Age Firs Las	/Sex: t Visit: t Visit:		36 / M	Res Bala Est I Est I	ponsible: A nce: 0.00 Ins: 0.00 Pat: 0.00
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			Please contact the	office if you have any	questions.									
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A yellow bar will appear indicating that the email or text message has been sent successfully.

Note: Emails and texts are saved in the Patient Notes section. You can access them by clicking the Patient Notes icon in the toolbar.

Email or Text a Patient Using the Schedule

Step 1

If a patient has an appointment booked, you can message them directly from the schedule.

Click the **Schedule** icon in the toolbar.

Step 2

Right-click the **patient's appointment** and hover over **Go To** which will open a drop down menu. Select **Email or Text Message**.

Scheduler	Patient • Tr	ransactions •	Charting • Reports (Old)	Reports Utilities Setup
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Step 3 Check eit	on.	Step 4Type your message.												
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Step 5

Click Send.

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