eCentral™
The Electronic Services Center

April 2012

Communication Manager User's Guide

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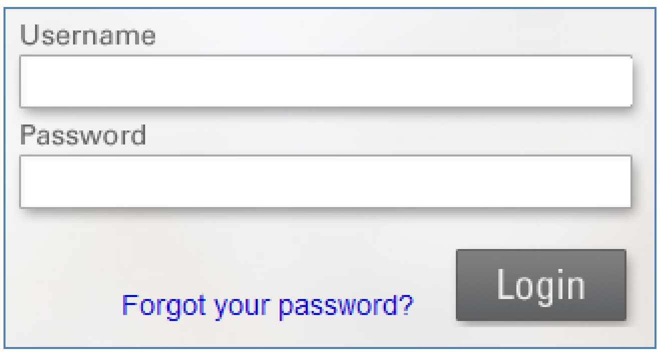
Overview

The eCentral Communication Manager contains a variety of useful main features:

- Automating Email, Text message, and Postcard correspondence for patient's appointments and recall.
- Automating Email Surveys following patient appointments
- Sending Email Newsletters to patients
- Managing Professional and Patient referrals

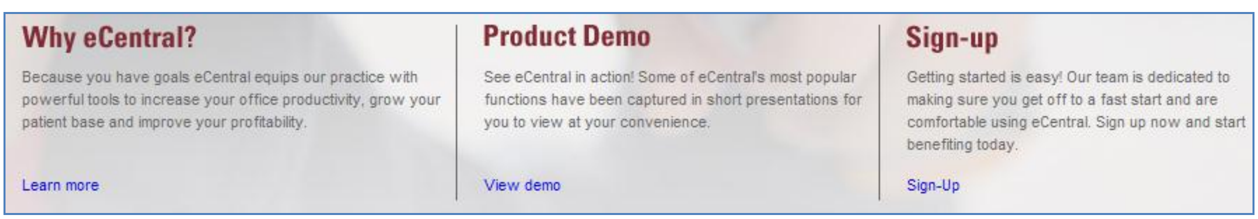
Logging in to eCentral

The login page is the first page you encounter when you try to access eCentral at eCentral.ident.com. To log in to eCentral, enter your **Username** and **Password** in the appropriate fields and click **Login**.

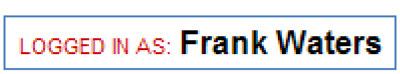


If you have forgotten your eCentral login password, type in your Username and click the **Forgot your password?** link to have your password emailed to you.

Tip: For your convenience, the bottom of the Login page includes links to learn more about eCentral, to view any of the video product demonstrations of eCentral, and to sign-up for eCentral.



After you log in to eCentral, the account name of your account is displayed in the upper-right corner of the page.



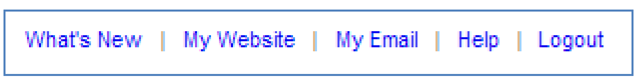
(By default, you are taken to the Home page once you log in)

Navigating eCentral

Navigating in eCentral is easy:

To access the Home page, Appointments Manager, Communications Manager, Insurance Manager, and Web site Manager, move your mouse over the appropriate tab, and select the area you wish to access.

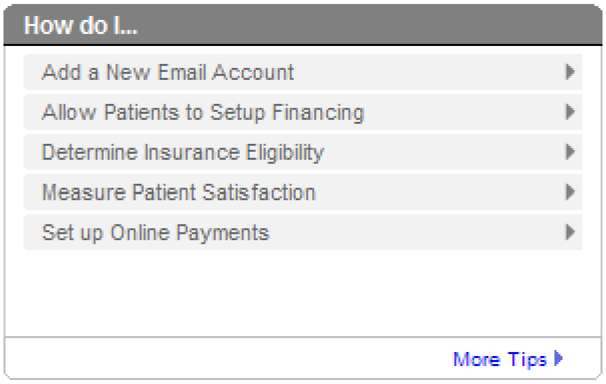
You can click any of the navigation links in the upper-right corner of the page:



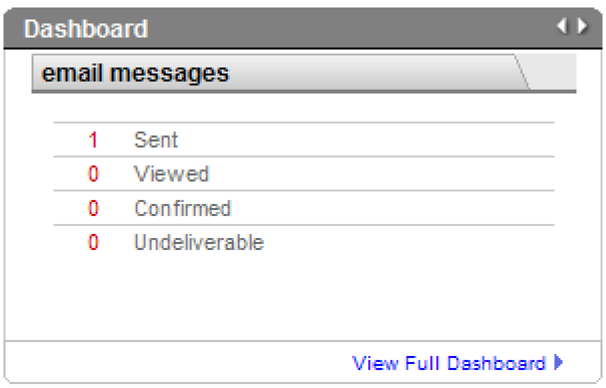
- **What's New** - Opens the National Information Services Web Site in a new browser window, from which you can explore the new features of eCentral
- **My Website** – Opens your practice's Web site in a new browser window.
- **My Email** – Opens the Ident email login page, from which you can access your Ident email account.
- **Help** – Provides access to the eCentral Help files.
- **Logout** – Logs you out of your eCentral account (you are returned to the Login page). You must enter your username and password to log back in to the site.

You can click the "Did You Know?" **Read More** link to view a list of helpful eCentral tips.

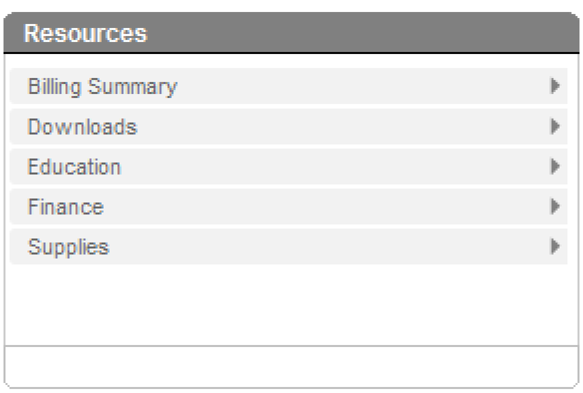
In the "How do I…" section, you can click any of the topics to open a Help file regarding that task. You can also click the **More Tips** link to open the eCentral Help files.



In the "Dashboard" section, you can view eCentral statistics for your practice. Click the left and right arrows to navigate between email messages, insurance claims, patient referrals, patient satisfaction, post cards, provider referrals, and text messages. Click the **View Full Dashboard** link to open the Dashboard so that you can see all the statistics at once. The Dashboard is also accessible from the **Home** tab menu and Home page.



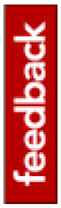
The "Resources" section provides links to several information resources:

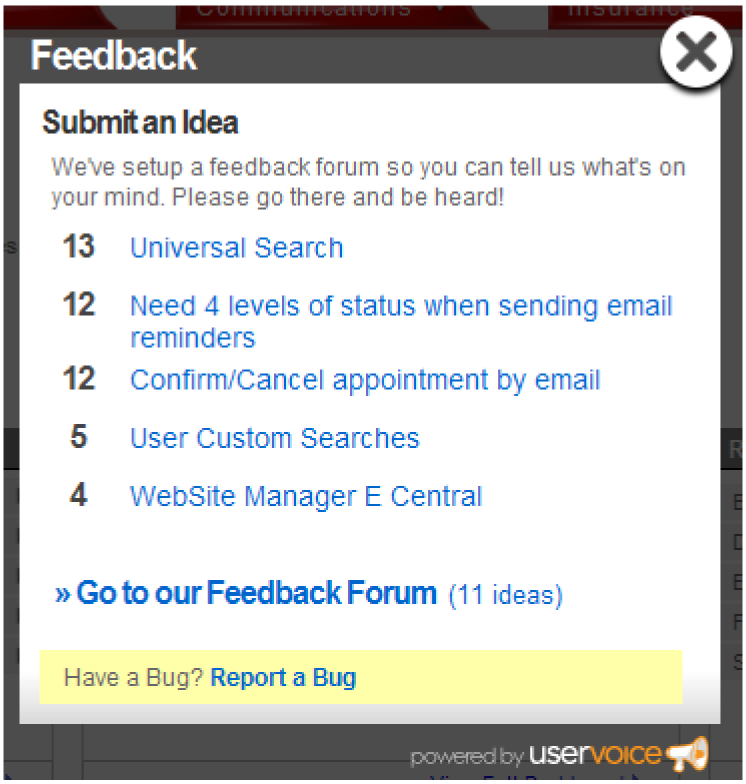


- **Billing Summary** – To view your billing statements for eCentral services.
- **Downloads** – To get eCentral updates
- **Education** – To open the Dental Resource Center Website in a new browser window.

- **Finance** – To set up payment plans and leasing options for patients. If you have a merchant account, your account information is listed. If you do not have a merchant account, you can sign up for one.
- **Supplies** – To open the Henry Schein website in a new browser window.

You can click the **Feedback** tab on the left side of the page to go to the feedback forum and submit an idea to improve eCentral or to report a software bug.





You can click any of the links at the bottom of the page:

- **Customer Support** – To contact an eCentral support representative by phone or email.
- **Feedback** – To submit an idea or report a bug.
- **Privacy Policy** – To view eCentral's policies to protect your privacy.
- **Terms & Conditions** – To view the terms of use for eCentral.

WebSync Wizard

Before you can use eCentral, you must set up the WebSync and other preferences.

Note: WebSync is accessed from your practice management software (such as DENTRIX or EasyDental) via the software's toolbar (such as the DXWeb Toolbar or EasyWeb Toolbar). For more information, refer to the documentation for your practice management software.

The WebSync Wizard helps you set up the following options, so you can transfer information back and forth between your practice management software and your eCentral Web Site:

- WebSync Setup
- Correspondence Setup
- Patient Upload Setup
- Questionnaire Upload Setup
- Patient Financing Setup
- Insurance Eligibility Setup
- Insurance Claim Tracking Setup

Through this manual, we will be focusing on the Communication Manager features, which use the WebSync Setup and Correspondence Setup.

If you want to set up each WebSync option in the wizard, click **Next** to continue to the next step and proceed through the wizard. If at any time you need to return to a previous step, click **Back** to return to the previous step in the Wizard.

If you want to set up a specific feature of the WebSync without going through all the steps in the Wizard, click the feature in the navigation list to go directly to that setup step. Please note that you must complete the wizard once in its entirety before you can jump to individual steps.

Important: You must go to the Finish step of the wizard and click **Finish** to save any changes you make before you exit the wizard. If you need to exit the wizard before you click **Finish**, click **Cancel**. If you cancel and leave the wizard without clicking **Finish**, all your changes will be lost.

WebSync Setup

Running WebSync synchronizes the information in your practice management software (such as DENTRIX or EasyDental) with the information in your eCentral Web site. For the Communication Manager, the WebSync allows you to send the correspondence you have requested to your patients.

To access and use WebSync

- Click the **Settings** icon on your practice management software's toolbar, and select **WebSync Wizard**.

The WebSync Wizard appears.

You can customize the information you would like to sync in the WebSync setup. You can also customize the frequency of the reminders that are generated about the WebSync. This document will discuss WebSync Setup, Settings, and the WebSync itself.

Login Setup

In the Login Setup group box, enter the User ID and Password you received when you registered your eCentral account. If you have not registered for an eCentral account, you can click *Register*. You do not need to register if you already have an eCentral account. If you forgot your password, click *Forgot Password*. An email with the password will be sent to the email address associated with the user account that is entered.

Schedule WebSync

You can run the WebSync automatically in the Schedule WebSync dialog. If you want the WebSync to run automatically at a specific time, mark *Once Daily at* and select a time. If you do not want the WebSync to run automatically, mark *Do not run WebSync Automatically*.

WebSync Options

In the WebSync options group box, check the box next to the options you would like to include during the WebSync:

- Correspondence Upload
- Patient Upload
- Questionnaire Upload
- Referral Upload
- Insurance Eligibility Upload
- Insurance Claim Tracking Upload
- Download Patient Information Changes
- Download Appointment Status Updates
- DXWeb Toolbar Updates

If you want to include all the options in the WebSync, select **All**. For the Communication Manager, the **Correspondence Upload** is responsible for uploading email, text message, and postcard reminders for eCentral. The **Patient Upload** would be used if you wish to upload patients who have given web consent so that they can be sent email newsletters through eCentral. **Download Appointment Status Updates** is responsible for downloading email confirmations, such as when patients confirm their appointment by email. **Note:** If you have eSync 3.1 or greater installed in your practice, a plugin can be installed set up to download email, text, and postcard confirmations in real-time. If this is set up already, **Download Appointment Status Updates** can be disabled.

Correspondence Setup

Sending correspondence to your patients keeps them informed about their scheduled appointments and continuing care deadlines. Correspondence helps you reduce the number of missed appointments in your office and keeps your patients informed about their treatment needs.

You can send Appointment reminders and Continuing Care reminders to your patients via letters, postcards, email messages, or text messages. These correspondences must be set up in the DXWeb Toolbar and your eCentral Web site before they can be sent.

To access and set up Correspondence in the WebSync

1. Click the **Settings** icon on your practice management software's toolbar, and select **WebSync Wizard**. The WebSync Wizard appears.
2. Click **Correspondence** to display the Correspondence Setup dialog box.

Correspondence Types

Place a check mark in the box next to the correspondence type(s) you want to send to your patients. You can select one, two, or all options. **Note**: It is recommended that you do not select any correspondence types until you have set up the correspondences and are ready to start sending them.

- **Email** – Enables email to be sent to those patients with an email address set up in the Family File or Patient Setup
- **Text Message** – Enables text messages to be sent to patients with a cell phone listed in the Mobile or Other fields in the Family File

- **Postcard** – Enables postcards to be printed and sent to patients with an address set up in the Family File

Enabling any of these options indicates that you agree to the Pricing and Terms of Use. Click Pricing and Terms of Use link to view those terms and conditions.

Select Correspondence

In the Select Correspondence group box, select the correspondence you want to send. By default, ten correspondence templates are available:

- Appointment Reminder, 30 days before appointment
- Appointment Reminder, 14 days before appointment
- Appointment Reminder, 1 day before appointment
- Continuing Care Reminder, 30 days before appointment
- Continuing Care Reminder, 14 days before appointment
- Continuing Care Reminder, 1 day before appointment
- Continuing Care Due, 30 days before due date
- Continuing Care Due, 14 days before due date
- Continuing Care Due, 1 days past due
- Continuing Care Due, 90 days past due

If you want to send a correspondence that is not on the list, click **New**. If you want to change the settings of one of the default or any other existing correspondences, select one and click **Edit**. Clicking either of these buttons will open the Edit Correspondence dialog box (See “Edit Correspondence”).

eCentral Appointment Status

In the eCentral Appointment Status group box, select the status(es) of appointments you want to upload to the Appointments page of your eCentral account. The status(es) of appointments correspond to the statuses that are available in the appointment list in your pracitce management software.

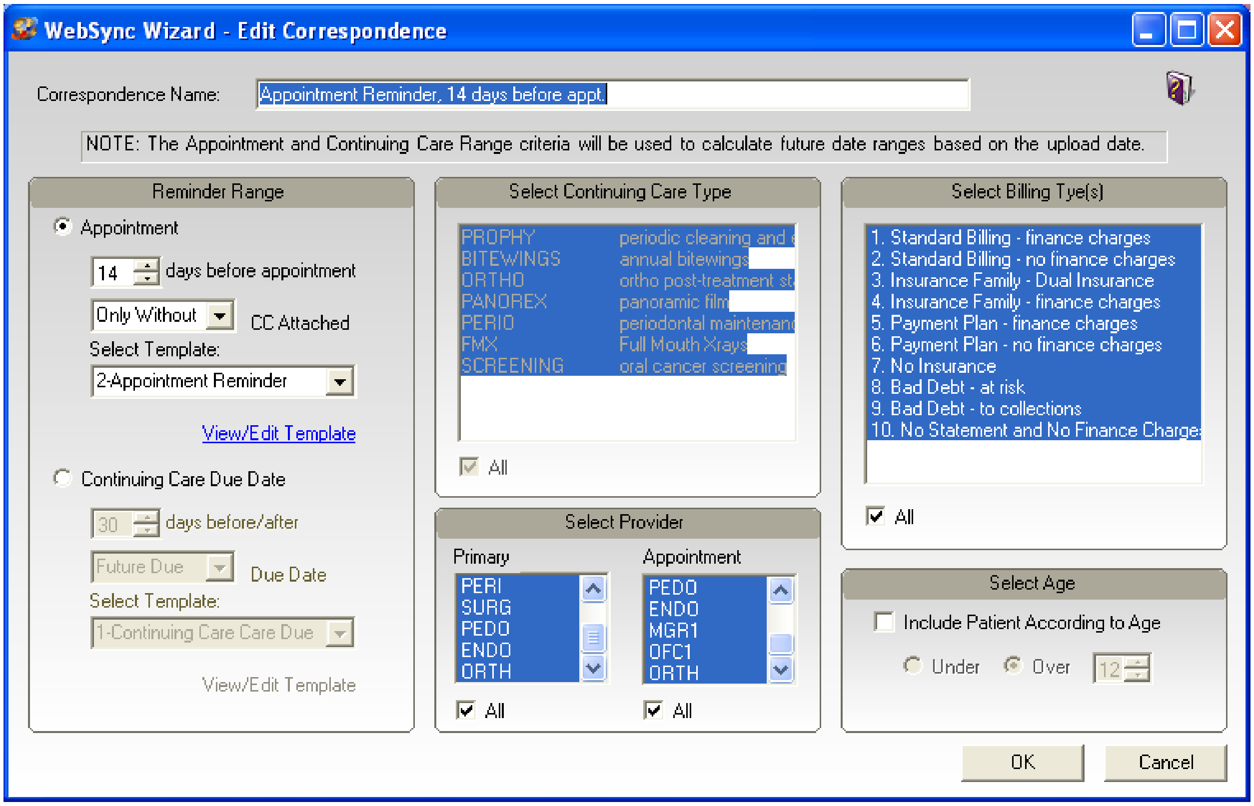
Two weeks of appointments in your practice management software's appointment module will be uploaded to the eCentral Appointment Manager every time the WebSync runs, but the appointments that have the status(es) you specify in the eCentral Appointment Status group box will be marked as confirmed appointments in the eCentral Appointment Manager.

Practice Management Appointment Status

In the Practice Management Appointment Status group box, select the status you want to display in the patient’s appointment of your practice management system when patients confirm their appointment by email, and/or when you confirm appointments from the Appointment Manager in eCentral.

Edit Correspondence

The Edit Correspondence dialog box is accessed when you click **Edit** from the Correspondence Setup dialog box (See “Correspondence Setup”).



Correspondence Name

Enter the Correspondence Name you want to use for the correspondence you are creating/editing.

Reminder Range

Use Reminder Range to specify when you would like the reminder to be sent, and to specify what type of reminder.

To specify when reminders are sent

- In the **Reminder Range** section, select **Appointment** or **Continuing Care Due Date**, depending on whether you want reminders sent prior to an appointment or relative to a continuing care due date. The range you select will be the range that is used to determine which patients receive this correspondence.

If you select Appointment

1. In the **days before appointment** box, specify the number of days before the appointment you want to send the correspondence.
2. In the **CC Attached** box, select whether you would like to require that Continuing Care be attached to the appointment.

- If you select **Only With**, correspondence will be sent to only those appointments that are attached to the continuing care types specified.

- If you select **Only Without**, correspondence will be sent to only those appointments that do not have any continuing care types attached.

- If you select **All**, correspondence will be sent to all appointments in the date range, whether or not the appointments have continuing care attached.

3. Select the Template you want to use for this correspondence. The Templates listed are the templates you have set up on your eCentral account. Click **View/Edit Template** to go to your eCentral account to view or modify these templates (this will be covered later in this guide in more detail).

If you select Continuing Care Due Date

1. In the **days before/after** box, specify the number of days before or after the due date you want to send the correspondence.

2. In the **Due Date** box, select whether you want to send the correspondence before or after the due date.

3. Select the Template you want to use for this correspondence. The Templates listed are the templates you have set up on your eCentral account. Click **View/Edit Template** to go to your eCentral account to view or modify these templates.

Select Continuing Care Type

Note: If you marked Appointment in the Reminder Range, you will only be able to select Continuing Care Types if you choose **Only With** from the **CC Attached?** list.

Select the Continuing Care Type(s) you want to include in this correspondence. Correspondence will be sent to only the selected continuing care type(s). The selectable continuing care types that are available are set up through your practice management software's Continuing Care/Recall Setup. To select all of these types, select the **All** option.

Select Provider

Select the Provider(s) you would like to include in this correspondence. You can choose to include patient providers based on their primary provider or their appointment provider. Correspondence will be sent to only the highlighted Provider(s). To select all of these types, check the **All** check box.

Select Billing Type(s)

Select the Billing Type(s) you want to include. Only patients with the selected billing type(s) will be included. Select **All** to include all billing types. The billing types that are available are the billing types that you have set up in the Practice Definitions of the Office Manager/Reports module.

Select Age

To send correspondence to only those patients who are under/over a specified age

1. Select **Include Patients According to Age**.
2. Select **Under** or **Over**, then in the Under/Over box, specify an age limit to use for your correspondence.

Finishing the Wizard

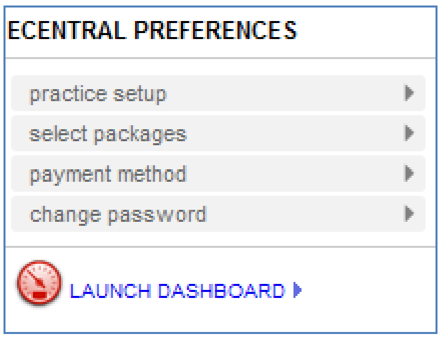
After setting up your desired reminders, select “Finish” on the left side of the WebSync Wizard, or keep continuing through the Wizard by pressing “Next”, and when at the Finish page, press the “Finish” button to save any changes you made while using the Websync Wizard. **Note**: Pressing “Cancel” will lose any changes you have made in the WebSync Wizard.

Account Settings

It is important to set up your account before you start using eCentral.

To configure account settings

- From the **Home** tab menu, click **Account Settings** to display the eCentral preferences on the left side of the navigation panel:



Under eCentral Preferences, you have the following options:

- Practice Setup
- Select Packages
- Payment Method
- Change Password
- Launch Dashboard

Practice Setup

The practice setup page displays the contact information, practice information, and product information you have specified for your eCentral account. It is important to enter this information and ensure that it is correct because it is the information that is used when you send correspondence and referrals and it is the information that is used to represent your practice in the professional contact list.

To configure your practice setup

- From the **Home** tab menu, click **Account Settings** to display the eCentral preferences on the left side of the navigation panel.

The Practice Setup page appears. If you are under Account Settings but in a different section, and wish to navigate back to Practice Setup, select **Practice Setup** on the navigation panel to the left.

PRACTICE SETUP

Please enter your information below and then select the 'Save Changes' button at the bottom of the page to save your changes.
Fields marked with a * are required

Contact Information

First Name: * [ ] MI: [ ] Last Name: * [ ] Title: [ ]

Practice Information

Practice Name: * [ ]

Customer ID: [ ]

Contact Name: [ ]

Mailing Address: * [ ] [ ]

City: * [ ]

State: * Utah

Country: * United States

Zip: * [ ]

Phone: * [ ]

Fax: [ ]

Email: * [ ]

Time Zone: * - select -

☐ Adjust time for daylight savings

Tax ID Number*: [ ]

NPI Number*: [ ]

**(When using "Patient Eligibilities", some insurance companies require these numbers.)*

Dental Software Currently Used:

Dentrix

Specialty: *

- ☑ General Practice
- ☐ Oral and Maxillofacial
- ☐ Endodontics
- ☐ Orthodontics
- ☐ Pediatric Dentistry
- ☐ Periodontics
- ☐ Prosthodontics
- ☐ Dental Public Health
- ☐ Dental Hygienist
- ☐ Dental Assistant
- ☐ Other

Product Information

☑ Yes *

☐ No *

Would you like to receive information about our products and partners?

Contact Information

This is where you enter the main owner contact name information for the eCentral product. It will not be displayed to patients.

- **First Name -** Enter the account subscriber's first name.
- **MI -** Enter the account subscriber's middle initial.
- **Last Name -** Enter the account subscriber's last name.
- **Title -** Enter the account subscriber's title.

Practice Information

- **Practice Name -** Enter the name of the practice. This name will be displayed on the practice template Web site when creating it for the first time, and also will be used as your practice name displayed to patients when using Email and/or Web site surveys.
- **Customer ID -** Enter the practice customer ID number.
- **Contact Name -** Enter the contact name. This may be the owner of the eCentral product, or the contact who manages eCentral. It will not be displayed to patients.
- **Mailing Address -** Enter the practice mailing address. This information will appear on the practice template Web site when creating it for the first time.
- **City -** Enter the practice city. This information will appear on the practice template Web site when creating it for the first time.
- **State -** Enter the practice state. This information will appear on the practice template Web site when creating it for the first time.
- **Country -** Enter the practice country.
- **Zip -** Enter the practice ZIP code. This information will appear on the practice template Web site when creating it for the first time.
- **Phone -** Enter the practice phone number. This information will appear on the practice template Web site when creating it for the first time, and will also be displayed in Email, Text message, and Postcard correspondence reminders for patients as your main contact number.
- **Fax -** Enter the practice fax number. This information will be displayed in Email correspondence reminders for the patient as your main contact number.
- **Email -** Enter the email address to which you want correspondence to be sent. This email address will appear as the reply to address for patient communication and in Email correspondence reminders.

- **Time Zone -** Select the office time zone. This information will be used for the text messaging feature in the Communication Manager.
- **Tax ID Number -** Enter the practice tax ID number. Insurance companies require this number to check for patient eligibility (Insurance Manager only).
- **NPI Number -** Enter the NPI number. Some insurance companies require this number to check for patient eligibility (Insurance Manager only).
- **Specialty -** Check the office specialty.

Product Information

- **Yes -** Check yes if you want to receive information about our products and partners.
- **No -** Check no if you don't want to receive information about our products and partners.

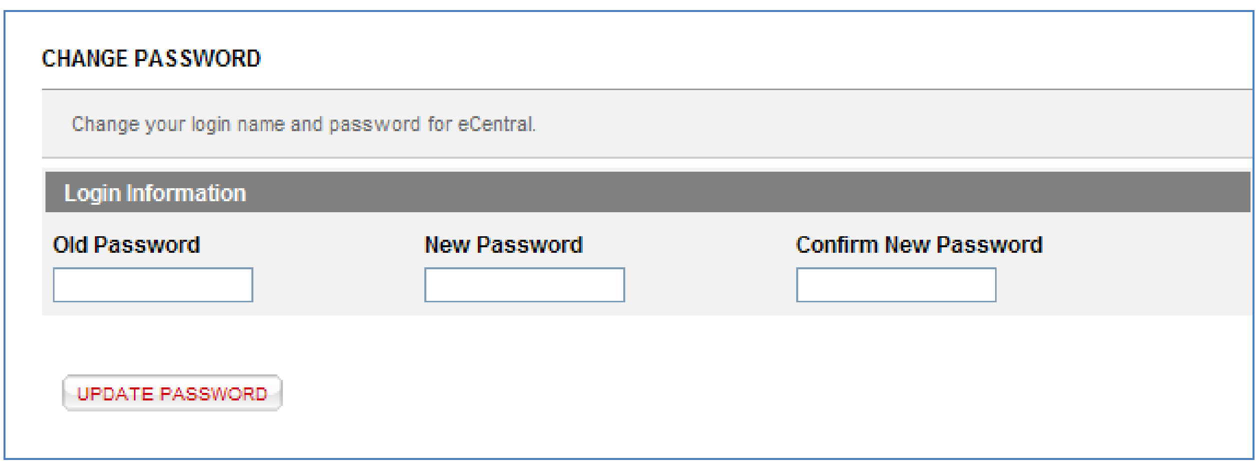
When you are finished making changes to the practice information, you may save it by pressing the “Save” button that appears at the bottom of this section. It will notify you if the settings were saved successfully.

Change Password

You should change your eCentral login password periodically to keep your information safe. You can manage your login name and passwords for eCentral from the Change Password window.

To change your password

1. From the **Home** tab menu on the eCentral Web page, click **Account Settings** to display the eCentral preferences on the left side of the navigation panel.
2. Click **change password** to display the Change Password window.



3. In the **Old Password** field, type your current password.
4. In the **New Password** field, type your new password.

5. In the **Confirm New Password** field, type your password again.
6. Click **Update Password** to update your password.

Important Notes: When changing your password, you will also want to make sure to update the new password in the WebSync Wizard software, and also in the newer eSync software (if installed), so that they will synchronize properly to your eCentral account. Also, this will change the password for the Dentrix Mobile and Kiosk login.

Email and Postcard Campaigns

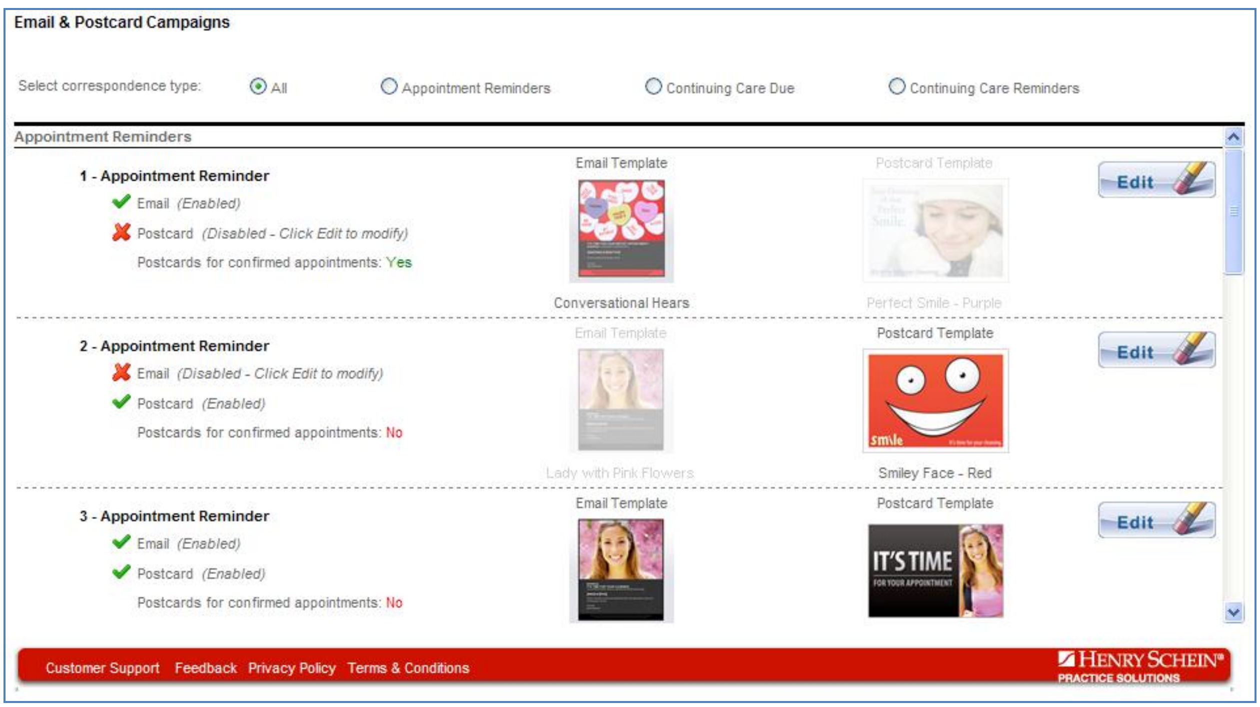
Using eCentral, you can set up automated email and postcard campaigns to remind patients of upcoming appointments and continuing care. (In eCentral, you can select templates that specify what the email and postcard reminders will look like when you send them to your patients.) Because there are several types of correspondence that patients need to receive, you can use different email and postcard templates for each type of correspondence.

After you select your email and postcard templates in eCentral, in the WebSync Wizard you can specify which templates patients will receive for their reminders (See "Correspondence Setup" and "Edit Correspondence").

Note: The Email & Postcards Setup campaign in eCentral works in conjunction with the Correspondence Setup section of the DXWeb WebSync Wizard.

To select a template for a specific correspondence type in eCentral

1. From the eCentral **Communications** tab menu, click **email/postcard campaigns** to display the Email & Postcard Campaigns page.



2. Select the correspondence type that you would like to see:

- **All** – All types of campaigns display in the list. (This is the default option.)
- **Appointment Reminders** – Only the Appointment Reminder campaigns display in the list.
- **Continuing Care Due** – Only the Continuing Care Due campaigns display in the list.

- **Continuing Care Reminders** – Only the Continuing Care Reminder campaigns display in the list.

Note: These correspondence types are the same as the correspondence types that you select in the Websync Wizard's Correspondence Setup section.

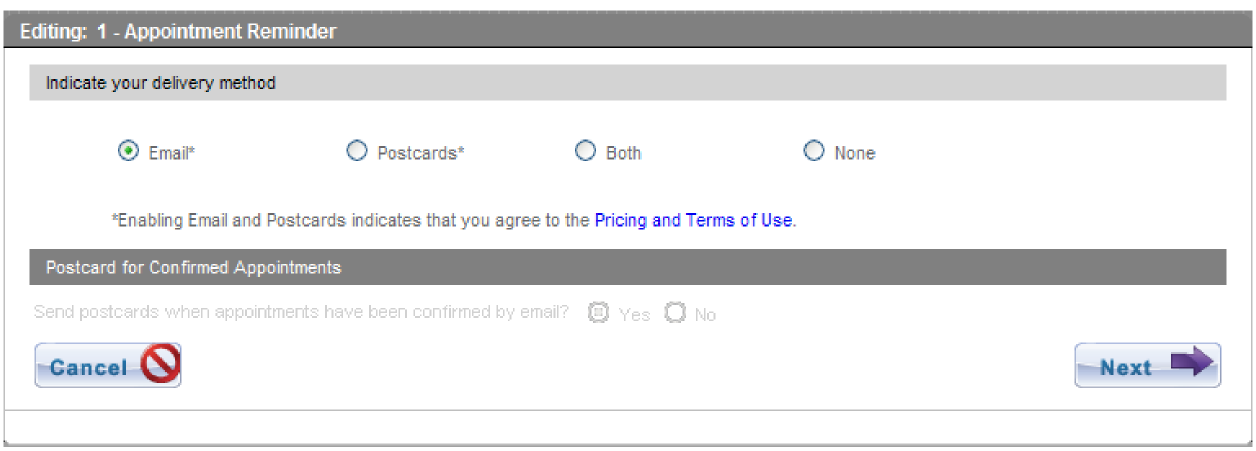
Important:

- If a green check mark ( ) and the word (Enabled) appear next to a delivery option, this means that this delivery option was selected and will be sent out as part of the campaign.
- If a red x icon ( ) and the text (Disabled - Click Edit to modify) appear next to a delivery option, this means that this delivery option was *not* selected and will *not* be sent out as part of the campaign.
- If a yellow warning sign ( ) appears next to a delivery method, this means that this option was disabled in the WebSync Wizard in Correspondence Setup.

Notes:

- If you later enable a delivery method in the WebSync Wizard, the option returns to its previous state in Email and Postcards Campaigns: either Enabled or Disabled.
- If you turn off a delivery method in the WebSync Wizard, it turns the selected delivery method off for every campaign that is configured to use it.
- When you turn an option on or off in the WebSync Wizard, to see the new settings in eCentral you may need to refresh the page in eCentral by pressing CTRL+F5 and clicking **Retry**.

3. Click **Edit** next to the campaign you want to change to display the Editing dialog box.



4. Select the delivery method for this campaign:

- **Email** - Only email will be sent for this campaign.

- **Postcards** - Only postcards will be sent for this campaign.
- **Both** - Both email and postcards will be sent for this campaign.
- **None** - Select this option to suspend the campaign for now; no email or postcards will be sent.

Notes:

- Depending on your selection, the email or postcards step may be eliminated from the subsequent configuration pages.
- Make sure you click the **Pricing and Terms of Use** link and read this information before proceeding with a postcard campaign.

5. If you select **Both** as the delivery method, the **Postcards for Confirmed Appointments** area becomes enabled. Click **Yes** to send postcards when appointments have been confirmed by email. Click **No** to not send postcards when appointments have been confirmed by email.

Important Tip: Keep in mind that it may take up to 7 days for a postcard to be delivered to the patient. eCentral will not schedule and send Postcards reminders that are uploaded by the WebSync any closer than 10 days before the patient's appointments.

6. Click **Next**.

The Email Template page appears with all templates in the General category displayed.

7. In the **Category** list, select a template category:

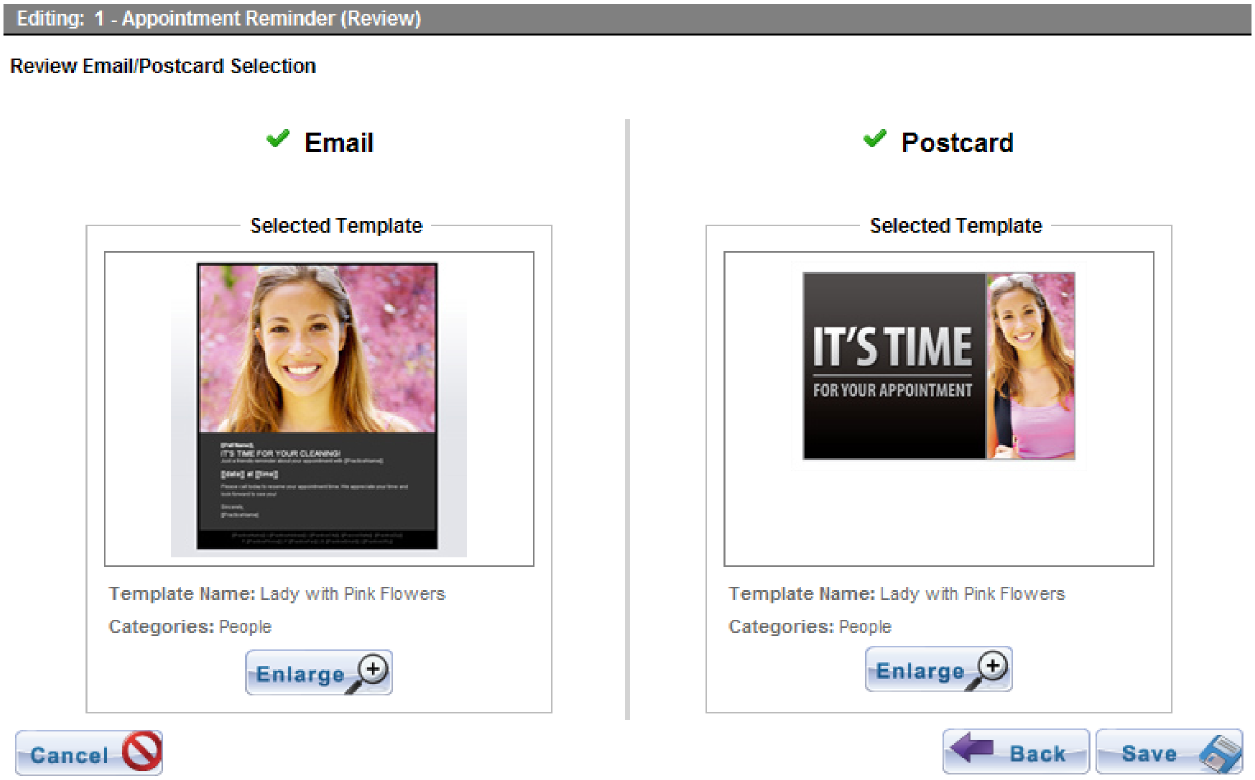
- **General**
- **Holiday**
- **Pediatric**
- **People**
- **Seasons**
- **All (Non Custom)** - Includes all templates from all categories.
- **My Custom** - Includes templates that you have modified and saved. For information on how to create custom email templates, see **Editing email Templates**.

8. Scroll through the template list and select the template you want to use.

Your selected template displays in the Selected Template area.

Tip: You can click **Enlarge** to display an enlarged version of the template. Click **Close** when finished.

9. Click **Next** to display the **Review Email/Postcard Selection** page (or the **Postcard** page if that option is enabled).



The page is divided in half to show you your selections for both email and postcards. A green check mark ( ) or red x icon ( ) are used to indicate whether the delivery option is currently enabled or disabled.

10. Click **Save**.

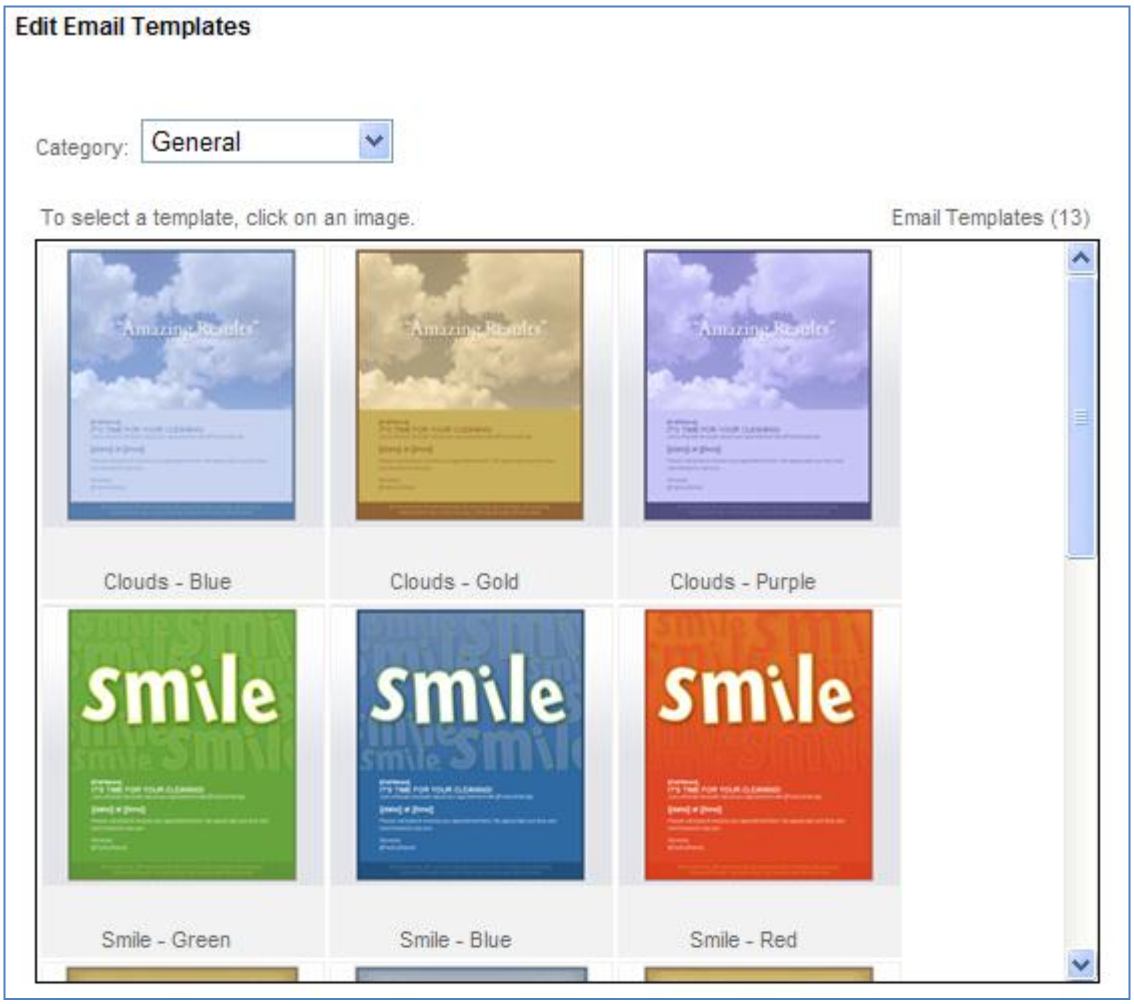
Your changes are saved, and the wizard closes and returns to the Email & Postcard Campaigns page.

Editing email templates

You can edit an email template and save your changes to use with an email campaign without affecting the original template.

To edit an email template

1. From the eCentral **Communications** tab menu, click **edit email templates** to display the Edit Email Templates page.



2. In the **Category** list, select a template category:

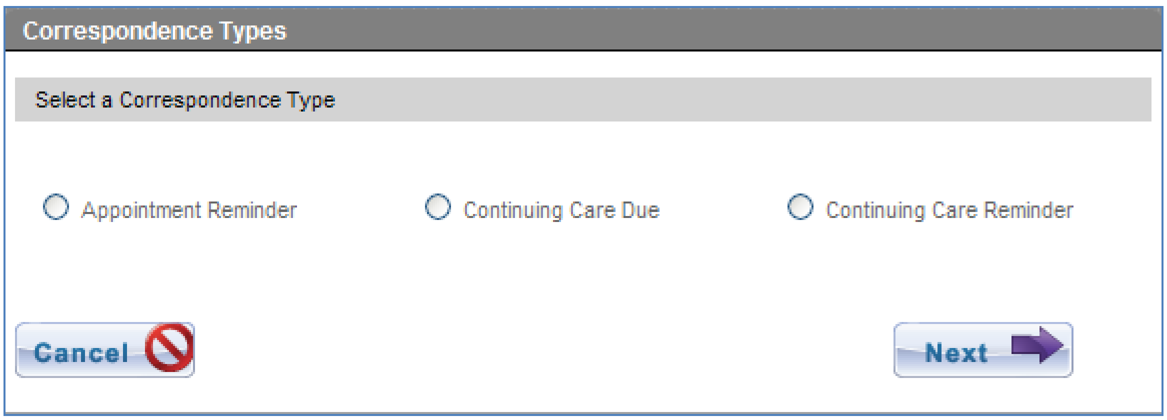
- **General**
- **Holiday**
- **Pediatric**

- **People**
- **Seasons**
- **All (Non Custom)** - Includes all templates from all categories.
- **My Custom** - Includes templates that you have modified and saved.

3. Scroll through the template list and select the template you want to use.

Your selected template displays in the Selected Template area.

4. Click **Edit** to display the Correspondence Types dialog box.



5. Select the campaign type that you would like to see:

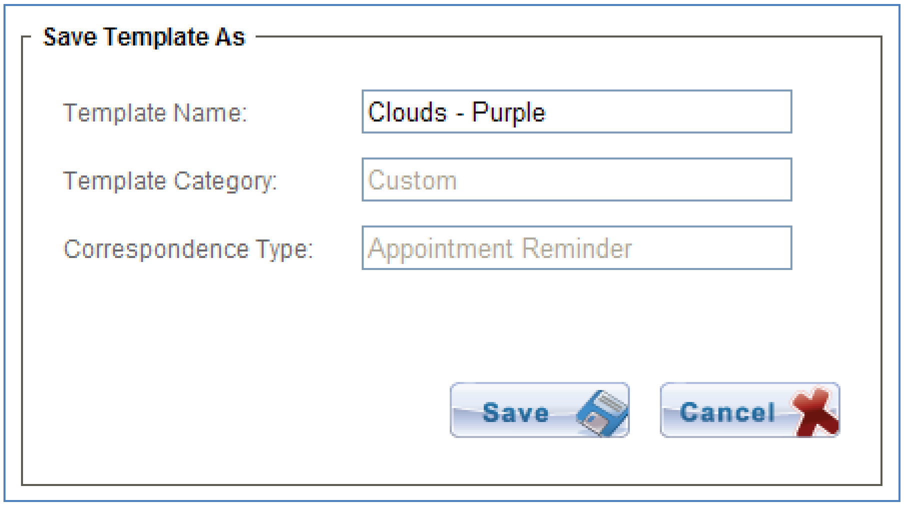
- **Appointment Reminder** - Only the Appointment Reminder type displays in the editor.
- **Continuing Care Due** - Only the Continuing Care Due type displays in the editor.
- **Continuing Care Reminders** - Only the Continuing Care Reminder type displays in the editor.

6. Click **Next**.

7. Use the Edit Correspondence editor to make any changes you want to the email template.

Tip: For help on using the toolbar and other editing tools, click the Help icon in the upper-right corner.

8. Click the **Save** icon on the toolbar.



9. The **Template Name** field defaults to the correspondence type and the template name. You can either use this default name or type a new template name, and then click **Save**.

Note: The other two fields cannot be edited here. The **Template Category** is set to *Custom* because you are defining a custom template. The **Correspondence Type** was selected previously and is displayed here as part of the summary.

Text messaging setup

In addition to email and postcard reminders, you can send text message reminders to your patients with cell phones.

Note: Before you can send text message reminders to your patients:

- It is recommended that patient's have a cell phone number entered in the **Mobile** or **Other** field in your practice management software, such as DENTRIX Family File. It will try the Mobile field first if a number is listed, then the Other field if the Mobile is blank. If there is no number listed in the Mobile or Other fields, it will try to schedule a text to the number in the **Home** field, and if that field is empty, last of all it will use the **Work** field number.

- You must enable text messaging in the WebSync Wizard.

- You must agree to the Terms of Use. To read the Terms of Use, click the **Terms of Use** link.

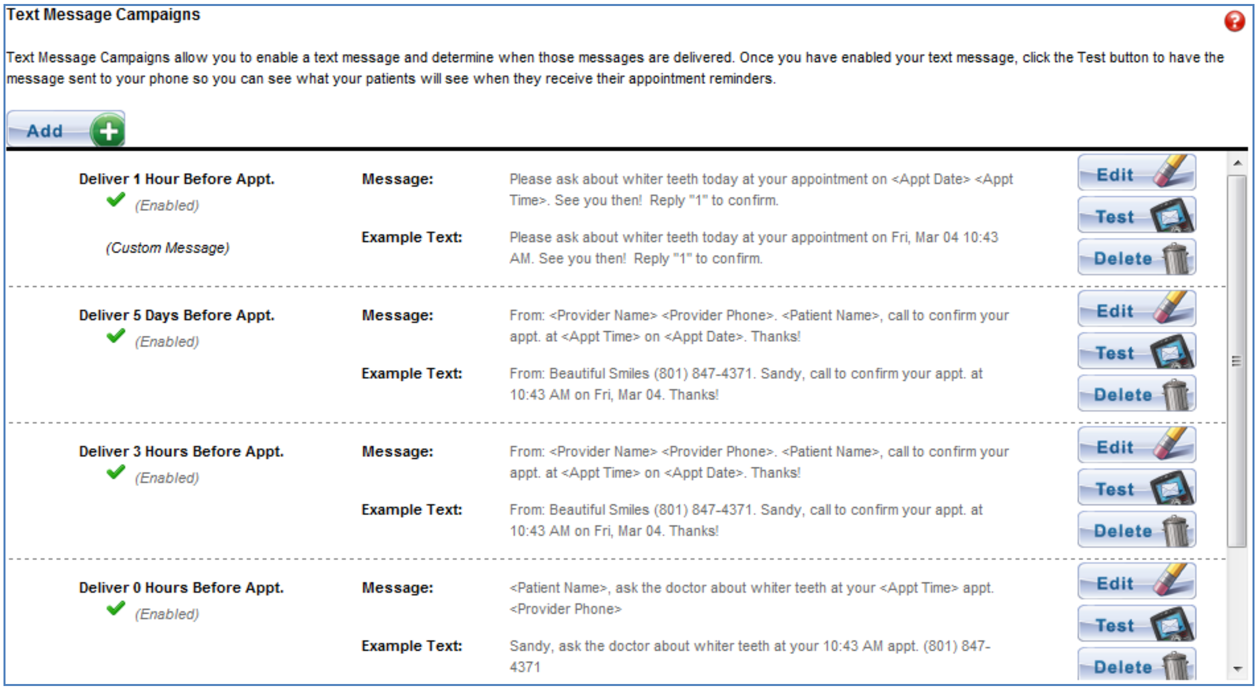
If you are using eSync, you can set up appointment status updates so that when patients confirm their appointment by responding to your text message, the appointment status is automatically updated in your practice management software.

Note: If patients don't want to receive text message reminders, they can opt out with a text message reply, and eCentral will not send them text message reminders. eCentral lets you view a Text Message Opt Out Report so that you can see which patients have opted out of automated text message reminders.

Tip: Using the Appointment Manager, you can view correspondence details, such as if a text message was sent or is waiting to be delivered, if a patient as confirmed his or her appointment, or if a patient has opted out from text message reminders.

To set up a text message reminder in eCentral

1. On the **Communications** tab menu, click **text message campaigns** to display the **Text Message Campaigns** page.



If a green check mark ( ) and the word (Enabled) appear next to a text message campaign, this means that this text message will be sent as part of the campaign.

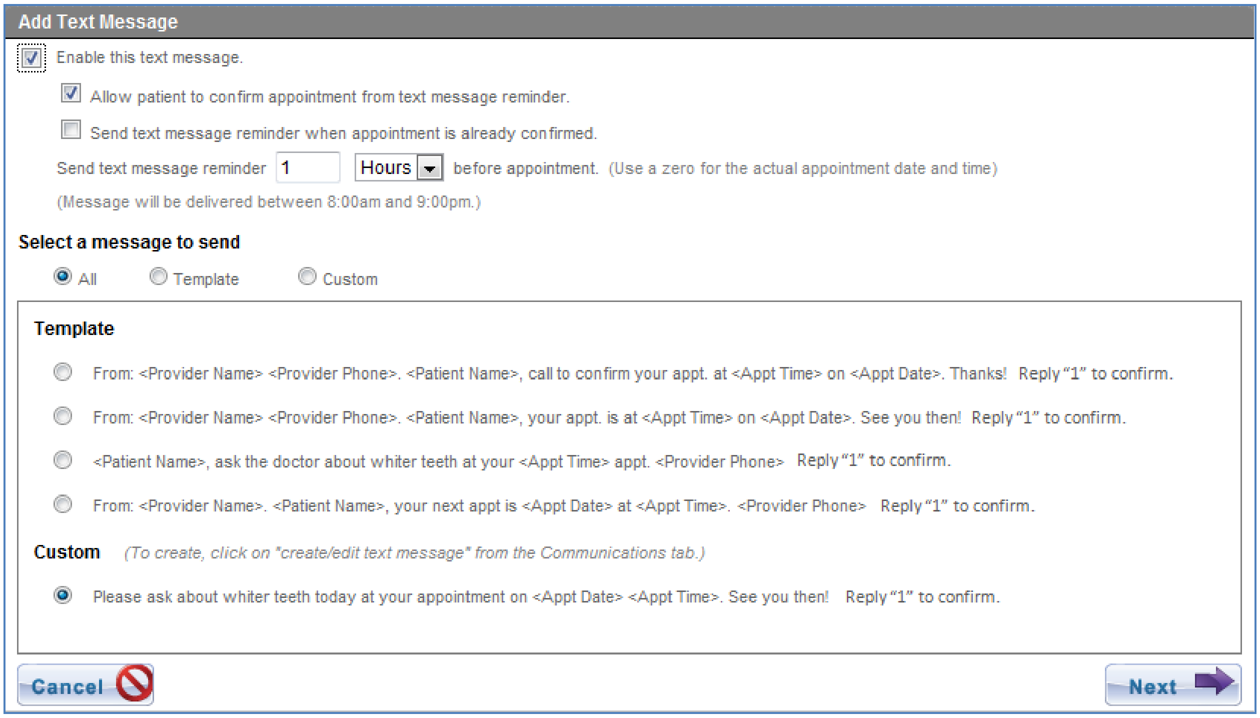
If a red x icon ( ) and the text (Disabled - Click Edit to modify) appear next to a text message campaign, this means that this text message will *not* be sent as part of the campaign. To enable a text message campaign, click **Edit** and select **Enable this text message**.

If text messages are disabled in the WebSync Wizard in Correspondence Setup, all of the campaigns appear in light gray and have the disabled icon ( ) next to them.

Notes:

- If you later enable this option in the WebSync Wizard, the option returns to its previous state in Text Message Campaigns (either Enabled or Disabled) for each campaign.
- If you turn off text messages in the WebSync Wizard, it turns all text messages off for every campaign
- When you turn an option on or off in the WebSync Wizard, to see the new settings in eCentral you need to refresh the page in eCentral by pressing F5.

2. Click **Add** (or **Edit**) to display the dialog box where you can add new text message campaigns or edit existing ones.



3. Make sure **Enable this text message** is selected (to make this text message active), then use the following options to set up your text messaging:

- **Allow patient to confirm appointment from text message reminder** - When this option is selected, text messages will include instructions for the patient to confirm the appointment.
- **Send text message reminder when appointment is already confirmed** - When this option is selected, text message reminders will be sent to patients who have already confirmed the appointment previously.
- **Send text message reminder before appointment -** Specify how long before the appointment you want to send the text message. Enter a number and then select either **Days** or **Hours**. You can enter up to 13 days or up to 23 hours before an appointment.

Tip: Enter a zero (0) for the message to deliver exactly at the actual appointment date and time.

- Under **Select a message to send**, click a filter to display only **Template** text messages (pre-defined in the software), **Custom** text messages (that you have created) or **All** text messages. All is selected by default.
- Select the text message format that you want to use for the campaign

4. When finished, click **Next**.

The **Reviewing: Text Message** page shows you the format for your final text message before it is sent.

Tip: You can click **Test** if you want to test the text message by sending it to the cell phone number you provide. After typing a cell phone number, click **Send**.

4. Click **Save**.

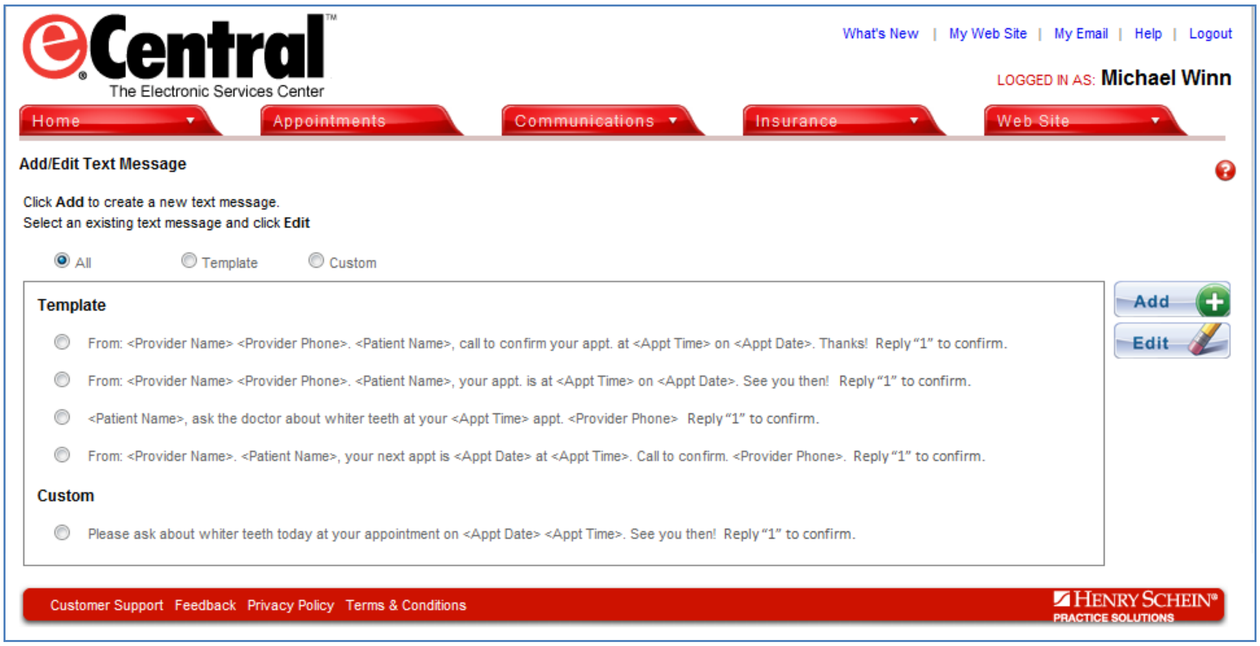
Important Notes about eCentral Text Messaging: These text messages will be delivered to the patients from the number 24742. Patients have the capability of opting out by texting “STOP” (not case sensitive) to their text message or to that number after receiving a text from eCentral. If a patient does so, they will receive another text that will confirm that they are opted out, and that they can opt back in by texting “RESUME” (not case sensitive) to that number, which they can do so at any time. The patient will no longer receive any text messages unless they opt back in.

Patients will receive a mandatory one-time text notification the first time they are scheduled a text by eCentral that will notify them that they are set up for text message reminders from your office and allow them to opt out by texting “STOP”. It will also notify them that message and data rates may apply, meaning that they are only charged for the text based on their cellular service plan; there are no additional charges to the patient from eCentral for receiving a text.

Setting up custom text messages

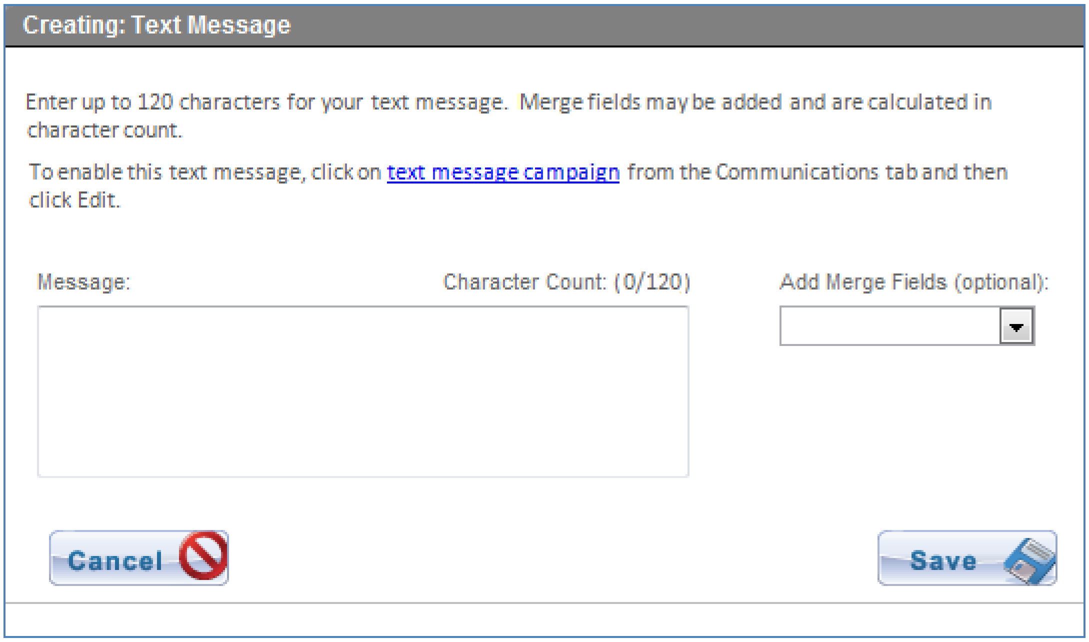
In addition to the pre-defined text message templates that are ready for you to set up and use, you can also define custom text messages.

1. On the **Communications** tab menu, click **add/edit text message** to display the **Add/Edit Text Message** page.



2. Click **Add**.

The **Creating Text Message** page appears.



3. In the **Message** field, type the text of your message (up to 120 characters).

4. If you want to insert merge fields in your text message, place your cursor where you want to add the merge field, click **Add Merge Fields**, and choose from the following:

- <Provider Name>
- <Provider Phone>
- <Patient Name>
- <Appt Date>
- <Appt Time>

Note:

- When text messages are sent, merge fields are automatically replaced with the specific data from your practice management software. For example, if you include the <Patient Name> merge field, the system will automatically replace <Patient Name> with the patient's name when the message is sent.

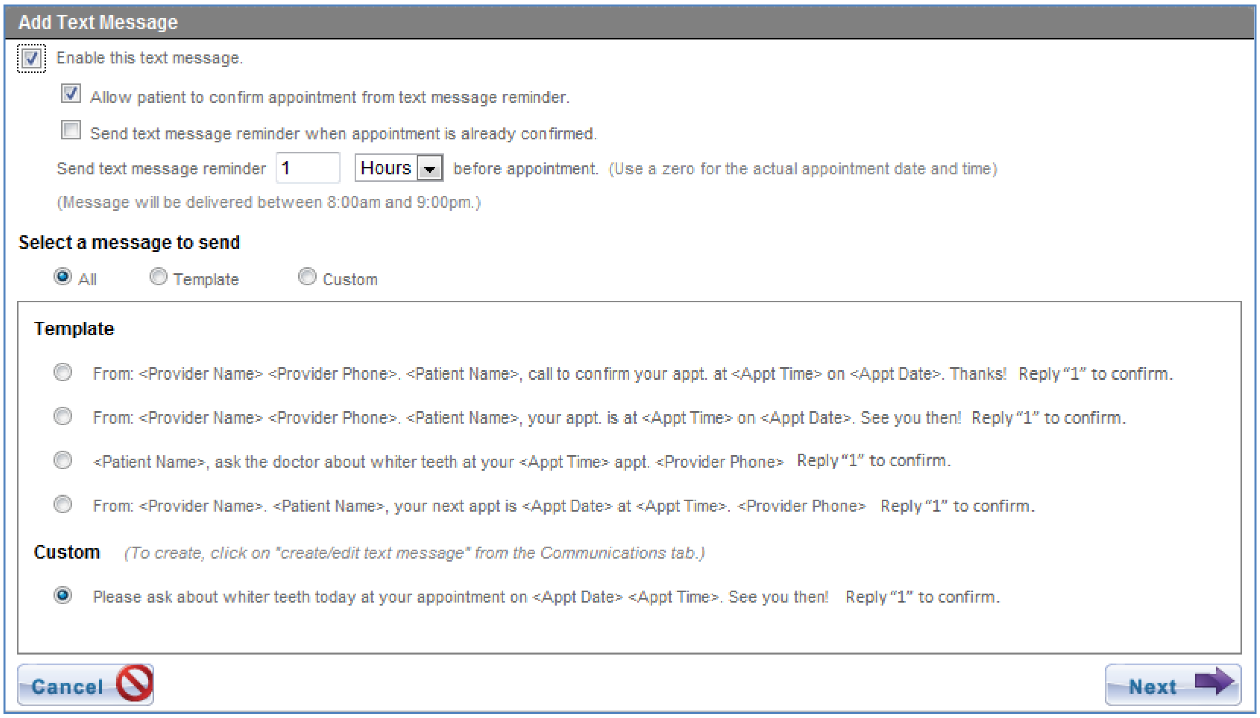
- Merge fields do count towards the total 120 characters you can include in your message. For example, the <Provider Phone> merge field adds 12 characters, the <Patient Name> merge field adds 10 characters, the <Appt Date> merge field adds 10 characters, and the <Appt Time> merge field adds 8 characters.

5. When finished, click **Save** to save the custom text message and return to the **Add/Edit Text Message** page. To make this new message an active campaign, you will need to select it in the **Text Message Campaigns** page.

6. On the **Communications** tab menu, click **text message campaigns** to display the **Text Message Campaigns** page.

Tip: You can also click the text message campaign link after typing the text message to go directly to the **Text Message Campaigns** page.

7. Click **Add** (or **Edit**) to display the dialog box where you can add new text message campaigns or edit existing ones.



8. Make sure **Enable this text message** is selected (to make this text message active), then use the following options to set up your text messaging:

· **Allow patient to confirm appointment from text message reminder** - When this option is selected, text messages will include instructions for the patient to confirm the appointment.

Note: The additional instructions do not reduce the number of characters you can include in your custom text message; you can still include up to 120 characters, not counting the confirmation instructions.

· **Send text message reminder when appointment is already confirmed** - When this option is selected, text message reminders will be sent to patients who have already confirmed the appointment previously.

· **Send text message reminder before appointment -** Specify how long before the appointment you want to send the text message. Enter a number and then select either **Days** or **Hours**. You can enter up to 13 days or up to 23 hours before an appointment.

Tip: Enter a zero (0) for the actual appointment date and time.

· Under **Select a message to send**, click a filter to display only **Template** text messages (pre-defined in the software), **Custom** text messages (that you have created) or **All** text messages. All is selected by default.

· Select the text message format you want to use for the campaign.

9. When finished, click **Next**.

The **Reviewing: Text Message** page shows you the format for your final text message before it is sent.

Tip: You can click **Test** if you want to test the text message by sending it to the cell phone number you provide. After typing a cell phone number, click **Send**.

10. Click **Save**.

Patient Surveys

Patient surveys help you discover the needs of your patients. With a few simple clicks in the Patient Surveys page of the Communication Manager, you can create an entire survey that will give you valuable insight into your patient's experience at your office. You can post patient surveys on your practice Web site, and you can automatically send surveys via email up to a week after an appointment.

There are three parts to the Patient Surveys page:

- **Setup** - Allows you to select which questions you want to include on your survey form, and allows you to select email delivery options.
- **Reports** - Allows you to view statistics about the surveys that your patients have completed.
- **Responses** - Allows you to view the responses on each survey that your patients have completed.

Patient Surveys Setup

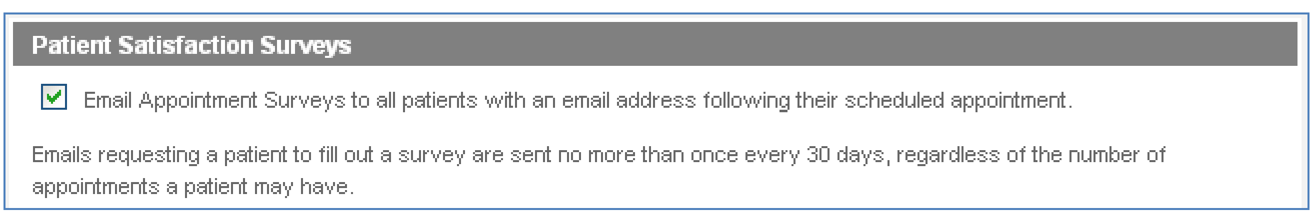
The Patient Surveys Setup page allows you to select the content of the patient surveys you want to deliver to your patients. It also allows you to set up email delivery options for your patient surveys. The Patient Survey Setup is divided into three sections: Patient Satisfaction Surveys, Survey Questions, and Delivery and Completion Events.

To set up patient surveys

1. From the **Communications** tab menu, click **patient survey.**

2. Click **Setup**.

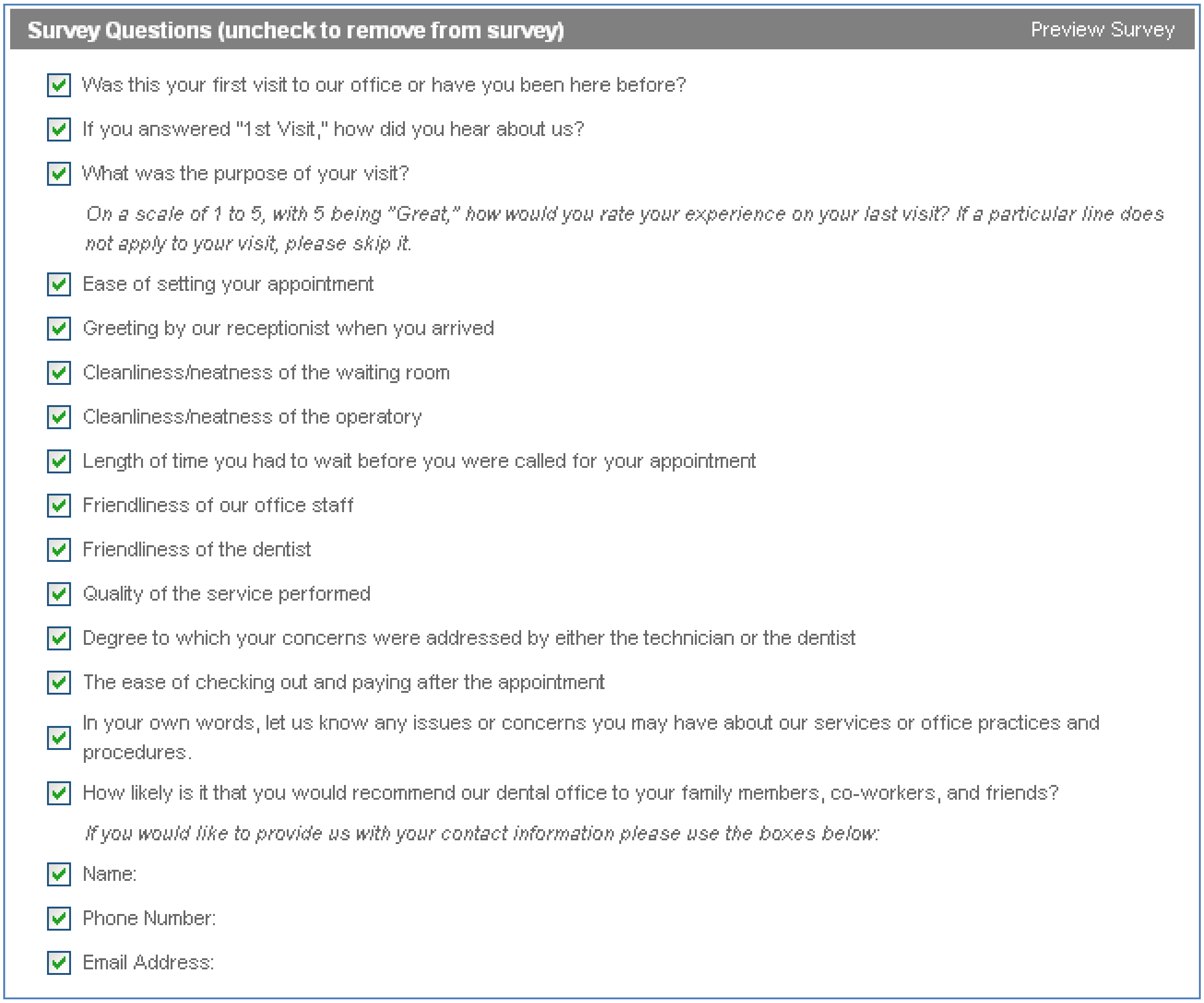
3. If you want to **email an Appointment Survey to all patients with an email address after their scheduled appointment**, select that check box.



Note: If you choose to have survey emails sent to patients after their appointments, no more than one survey email will be sent in a 30-day period, even if the patient has multiple appointments during those 30 days.

2. In the **Survey Questions** section, select the Survey Questions you want to include in the survey. (Clear the checkbox to remove the question from the survey.) You cannot add additional questions to the survey.

Tip: You can make all of your surveys anonymous by clearing the **Name**, **Phone Number**, and **Email Address** fields so that patients do not have the option to enter that information.



Survey Questions (uncheck to remove from survey) Preview Survey

- [x] Was this your first visit to our office or have you been here before?
- [x] If you answered "1st Visit," how did you hear about us?
- [x] What was the purpose of your visit?

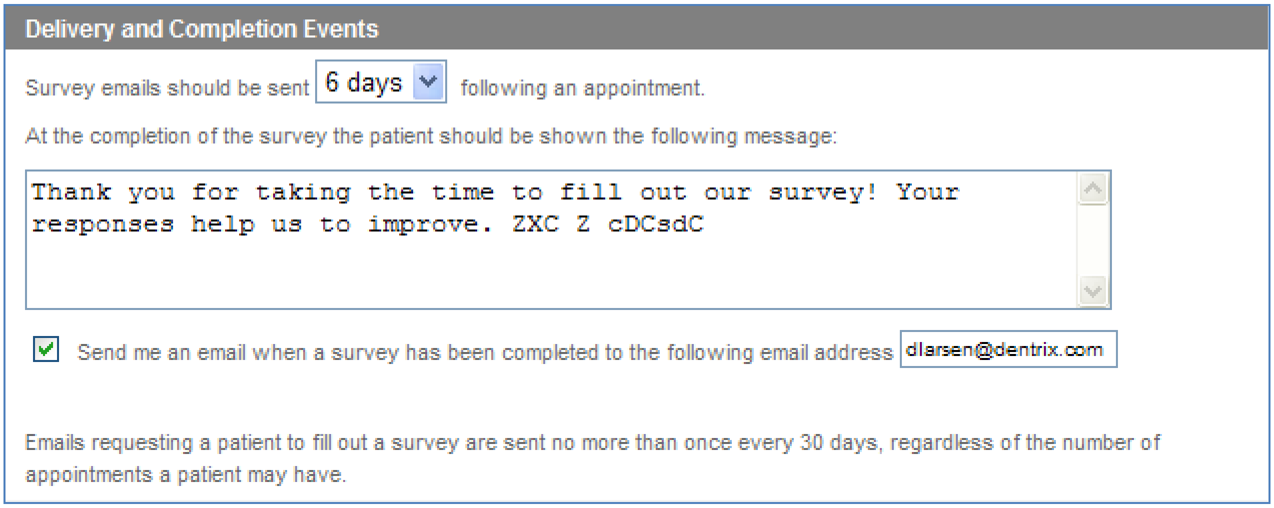
On a scale of 1 to 5, with 5 being "Great," how would you rate your experience on your last visit? If a particular line does not apply to your visit, please skip it.

- [x] Ease of setting your appointment
- [x] Greeting by our receptionist when you arrived
- [x] Cleanliness/neatness of the waiting room
- [x] Cleanliness/neatness of the operatory
- [x] Length of time you had to wait before you were called for your appointment
- [x] Friendliness of our office staff
- [x] Friendliness of the dentist
- [x] Quality of the service performed
- [x] Degree to which your concerns were addressed by either the technician or the dentist
- [x] The ease of checking out and paying after the appointment
- [x] In your own words, let us know any issues or concerns you may have about our services or office practices and procedures.
- [x] How likely is it that you would recommend our dental office to your family members, co-workers, and friends?

If you would like to provide us with your contact information please use the boxes below:

- [x] Name:
- [x] Phone Number:
- [x] Email Address:

3. In the Delivery and Completion section, select the number of days after an appointment you want to email surveys to patients. In the text box, enter the message you want patients to see when they complete the survey on your practice Web site. If you want to have an email message sent to you when a survey is completed, select **Send me an email when a survey has been completed...** and enter the email address where you want the email message to be sent.



4. When you have set up the survey the way you want it, click **Save** to save your changes. If you exit the Setup without clicking **Save**, your changes will be lost.

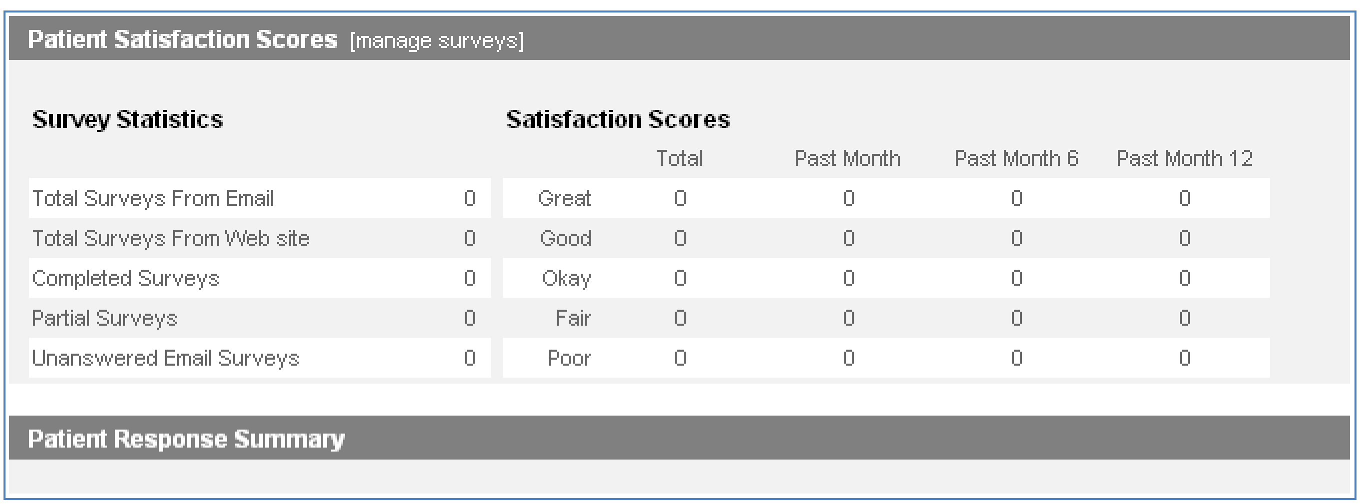
Previewing Surveys

You can preview a survey to see how the questions are formatted by clicking the **Preview Survey** link on the right side of the **Survey Questions**.

Note: If you include or exclude questions from the survey, you must first click **Save** if you want to view those changes using **Preview Survey**.

Reports

In the Patient Surveys Reports page, you can view statistics about the surveys that have been completed by your patients. You can also view the satisfaction scores for the last month, six months, and year. And, you can see response totals for each question in your survey.



Survey Statistics		Satisfaction Scores	Total	Past Month	Past Month 6	Past Month 12
Total Surveys From Email	0	Great	0	0	0	0
Total Surveys From Web site	0	Good	0	0	0	0
Completed Surveys	0	Okay	0	0	0	0
Partial Surveys	0	Fair	0	0	0	0
Unanswered Email Surveys	0	Poor	0	0	0	0

The Patient Surveys Reports are divided into two sections: Patient Satisfaction Scores and Patient Response Summary. These are described below:

Patient Satisfaction Scores

The Patient Satisfaction Scores section includes Survey Statistics and Satisfaction Scores.

- **Survey Statistics**: The survey statistics that are listed include: Total Surveys from Email, Total Surveys from Web site, Completed Surveys, Partial Surveys, and Unanswered Email Surveys. These statistics are based on all of the patient surveys that have been completed by or emailed to patients.

- **Satisfaction Scores**: The Satisfaction Scores show the number of surveys that received a Great, Good, Okay, Fair, or Poor rating. These scores are shown for the total number of surveys, the surveys submitted in the past month, the surveys submitted in the past six months, and the surveys submitted in the past year, so you can see how the survey scores for your office are progressing or regressing.

Patient Response Summary

The Patient Response Summary lists each of the questions on the surveys and the total number of responses that received each rating and the rate of responses that receive each rating.

To display the patient satisfaction scores and patient response summary

- From the **Communications** tab menu, click **patient survey.**

Responses

The Patient Surveys Responses lists each survey that has been completed by patients along with the date the survey was completed, the name of the patient who completed the survey (if the patient entered a name), the status of the survey (Complete or Incomplete), the source of the survey (such as Web or Email), and the score of the responses on the survey.

To display survey responses

1. From the **Communications** tab menu, click **patient survey.**

2. Click **Responses**.

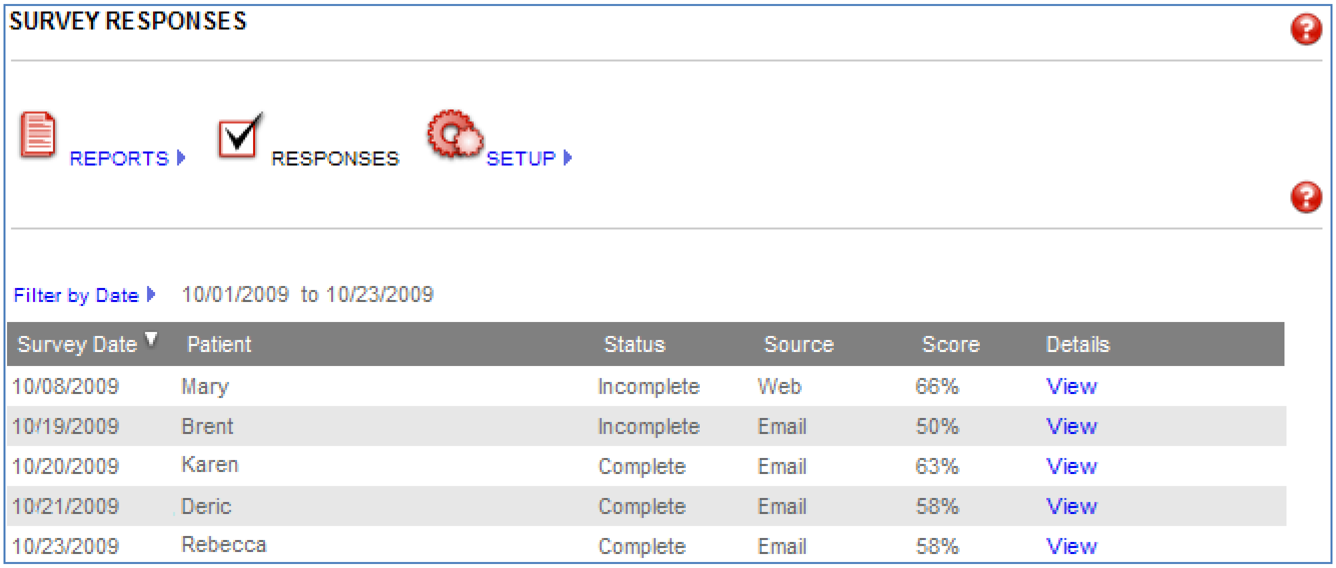
3. By default, the information in the Patient Survey Responses is listed for the previous month. To change the date range:

a. Click **Filter by Date**.

b. In the date fields, enter a start and end date for the responses you want to view.

c. Click **Submit**.

The survey responses are displayed.


SURVEY RESPONSES

REPORTS RESPONSES SETUP

Filter by Date 10/01/2009 to 10/23/2009

Survey Date	Patient	Status	Source	Score	Details
10/08/2009	Mary	Incomplete	Web	66%	View
10/19/2009	Brent	Incomplete	Email	50%	View
10/20/2009	Karen	Complete	Email	63%	View
10/21/2009	Deric	Complete	Email	58%	View
10/23/2009	Rebecca	Complete	Email	58%	View

To open a new window that displays the actual completed survey with responses

- In the **Details** column, click **View**.

Correspondence Manager

Using eCentral, sending patient appointment and continuing care reminders is easy and completely automated. After you have sent correspondence to your patients, a record of the correspondence is added to the Correspondence Manager.

To access the Correspondence Manager from the Communication Manager page

- From the **Communications** tab menu, click **correspondence reports**.

The Correspondence Manager tracks:

- Email correspondence
- Text message correspondence
- Postcard correspondence

To view the details of a certain type of correspondence, click the desired link on the Correspondence Manager page.

Email

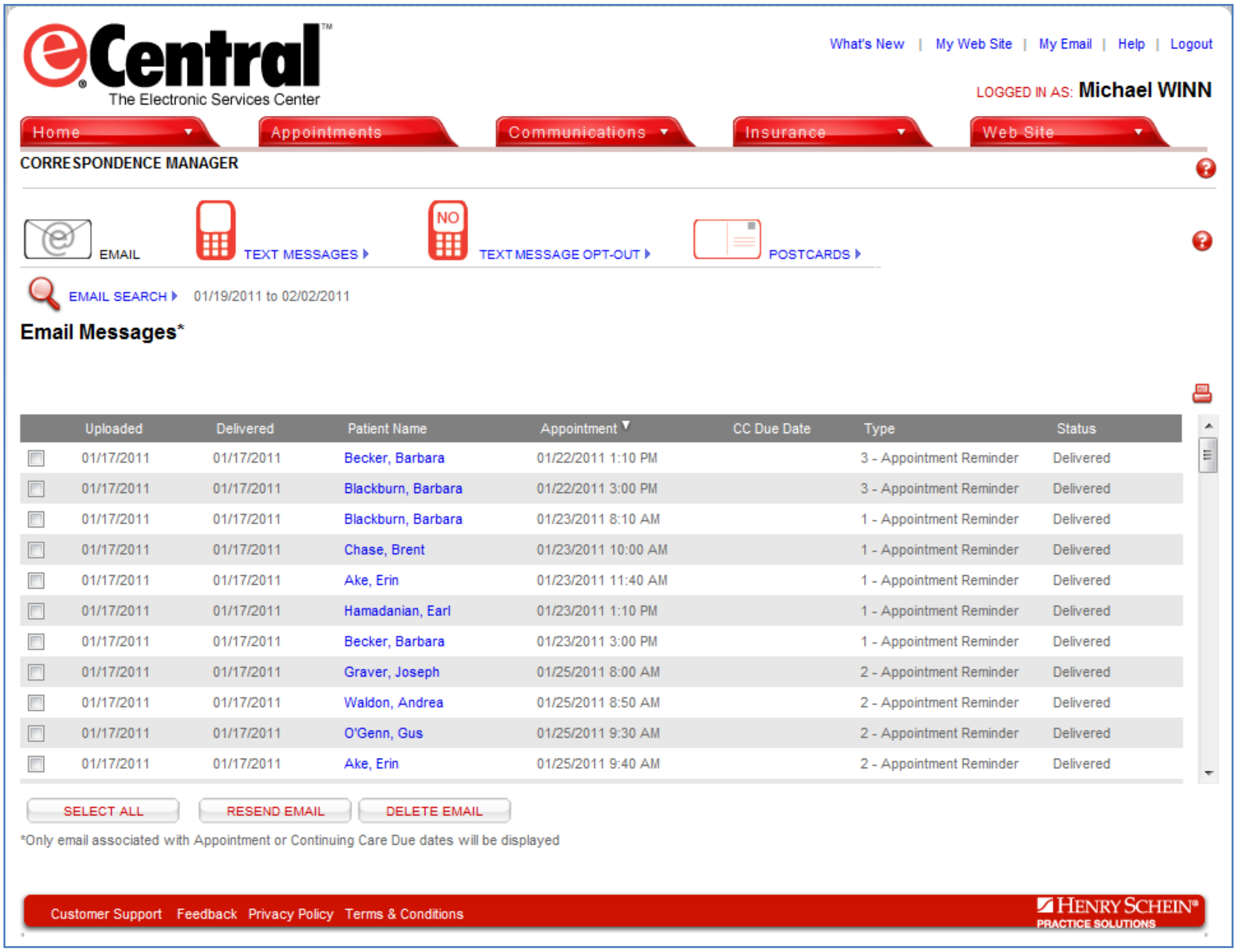
When you send email correspondence to your patients, a record of the message is added to the email section of the Correspondence Manager.

To display email correspondence in the Correspondence Manager

- From the **Communications** tab menu, click **correspondence reports**.

The Correspondence Manager appears with Email Messages selected by default.

Note: The list of email messages displayed are those that were sent prior to upcoming appointments and due dates that are scheduled between the specified search dates. Only email messages that are associated with an appointment or due date that falls between those search dates are displayed in the list. See Email Search below for more information.



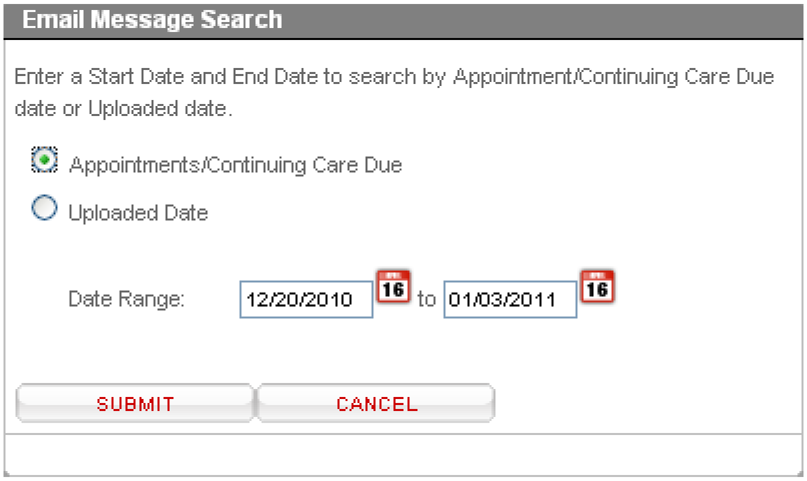
Each record in the list contains the uploaded date, delivery date, patient name, continuing care due date, appointment time, type of correspondence that was sent, and the status of the email.

You can sort your email messages by any of the categories listed. Click the name of the category to sort the list of email messages.

You can also resend or delete email from this list by selecting or clearing the checkbox next to the email message and clicking **Resend Email** or **Delete Email**.

Email Search

To search for a specific email message, click **Email Search**. The Email Message Search dialog box appears. In the dialog box, enter the Appointments/Continuing Care Due date to search by and click **Submit**. All email messages that were sent regarding Appointments or Continuing Care within the specified date range will be listed on the email Messages page.   You may also search by Uploaded Date, by selecting the option. This will allow you to display all emails uploaded by the WebSync in the specified date range.



Printing an email messages report

You can print the email messages you have sent through eCentral.

To print the Email Messages Report

1. Click the Printable Version button. A new window opens that displays the Email Messages Report.

2. Click the Print button to print the Email Messages Report.

Text Messages

When you send text message correspondence to your patients, a record of the message is added to the Text Messages page of the Correspondence Manager.

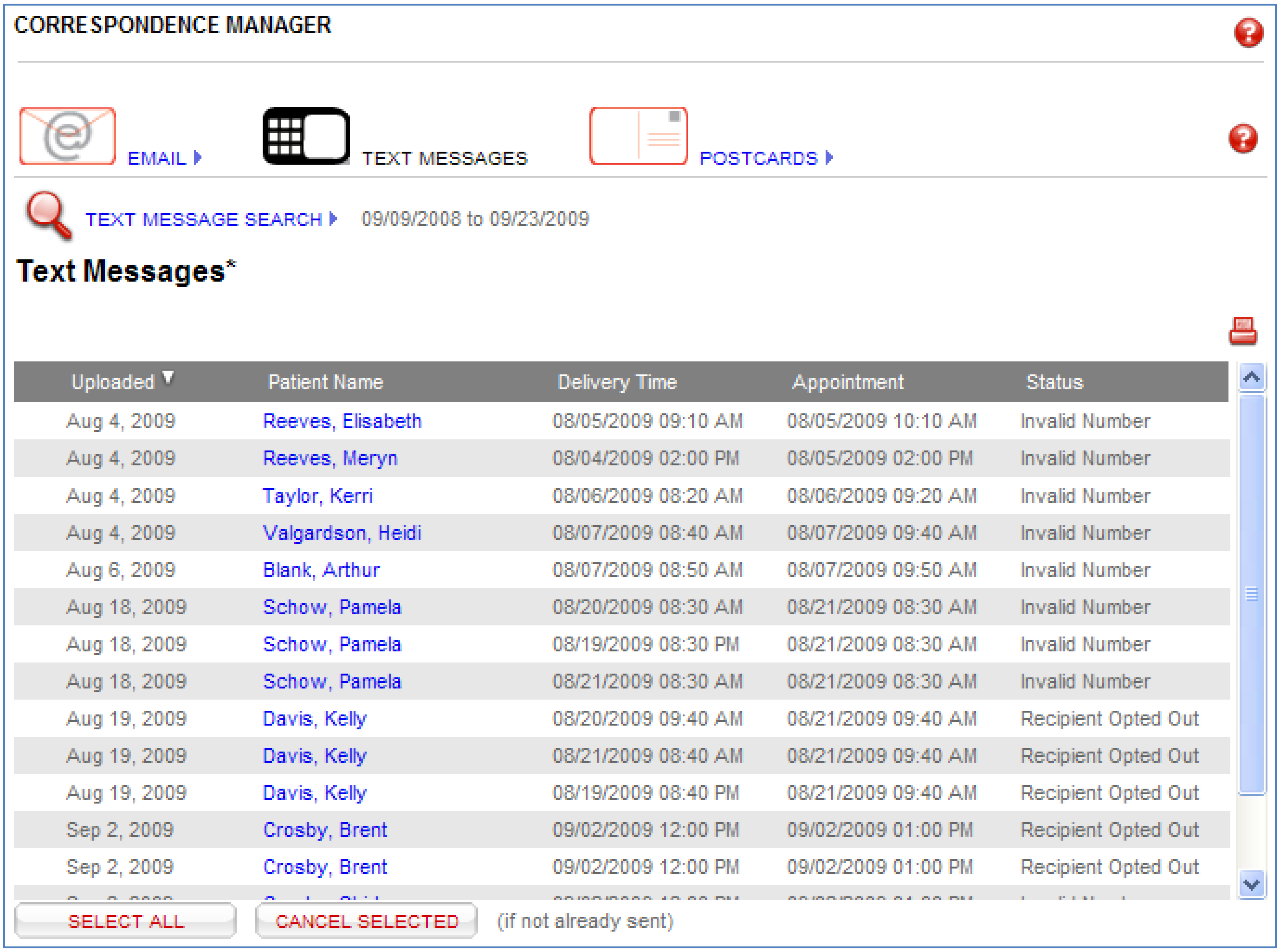
To display text message correspondence in the Correspondence Manager

1. From the **Communications** tab menu, click **correspondence reports**.

The Correspondence Manager appears.

2. Click **Text Messages**.

Note: The list of text messages displayed are those that were sent (or are still scheduled to send) prior to upcoming appointments that are scheduled between the specified search dates. Only text messages that are associated with an appointment that falls between those search dates are displayed in the list. See Text Message Search below for more information.



Uploaded	Patient Name	Delivery Time	Appointment	Status
Aug 4, 2009	Reeves, Elisabeth	08/05/2009 09:10 AM	08/05/2009 10:10 AM	Invalid Number
Aug 4, 2009	Reeves, Meryn	08/04/2009 02:00 PM	08/05/2009 02:00 PM	Invalid Number
Aug 4, 2009	Taylor, Kerri	08/06/2009 08:20 AM	08/06/2009 09:20 AM	Invalid Number
Aug 4, 2009	Valgardson, Heidi	08/07/2009 08:40 AM	08/07/2009 09:40 AM	Invalid Number
Aug 6, 2009	Blank, Arthur	08/07/2009 08:50 AM	08/07/2009 09:50 AM	Invalid Number
Aug 18, 2009	Schow, Pamela	08/20/2009 08:30 AM	08/21/2009 08:30 AM	Invalid Number
Aug 18, 2009	Schow, Pamela	08/19/2009 08:30 PM	08/21/2009 08:30 AM	Invalid Number
Aug 18, 2009	Schow, Pamela	08/21/2009 08:30 AM	08/21/2009 08:30 AM	Invalid Number
Aug 19, 2009	Davis, Kelly	08/20/2009 09:40 AM	08/21/2009 09:40 AM	Recipient Opted Out
Aug 19, 2009	Davis, Kelly	08/21/2009 08:40 AM	08/21/2009 09:40 AM	Recipient Opted Out
Aug 19, 2009	Davis, Kelly	08/19/2009 08:40 PM	08/21/2009 09:40 AM	Recipient Opted Out
Sep 2, 2009	Crosby, Brent	09/02/2009 12:00 PM	09/02/2009 01:00 PM	Recipient Opted Out
Sep 2, 2009	Crosby, Brent	09/02/2009 12:00 PM	09/02/2009 01:00 PM	Recipient Opted Out

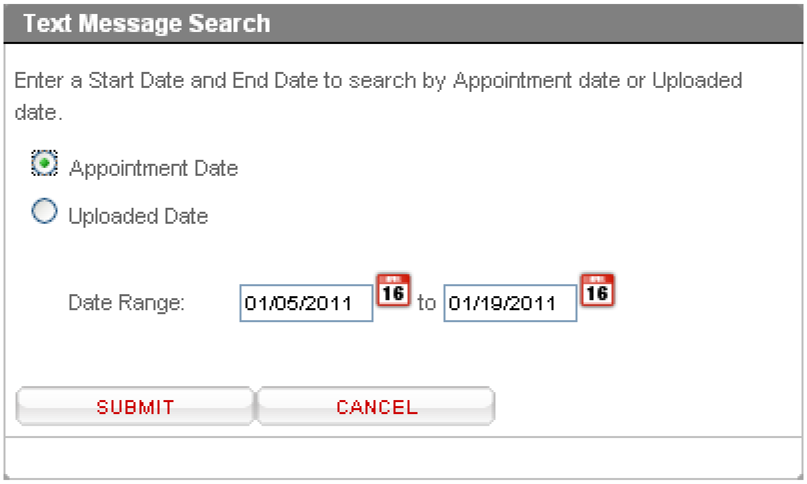
This record contains the uploaded date, patient name, delivery time, appointment time, and the status of the text message.

You can sort your text messages by any of the categories listed. Click the name of the category to sort the list of text messages.

You can also cancel text messages from this list by selecting or clearing the checkbox next to the text messages and clicking **Cancel Selected**. **Note:** You cannot cancel a text message if it has already been delivered.

Text Message Search

To search for a specific message, click **Text Message Search**. The Text Message Search dialog box appears.



In the dialog box, to search by appointment date, select "Appointment Date", enter the range of appointment dates to search by, and click **Submit**. All messages that were sent regarding Appointments within the specified date range will be listed on the Text Messages page. You may also search by Uploaded Date, by selecting the option. This will allow you to display all text messages uploaded by the WebSync in the specified date range.

Printing a text messages report

You can print the text messages you have sent through eCentral.

To print the Text Messages Report

1. Click the Printable Version icon on the right side of the screen.

2. Click **Print**.

Postcards

When you send postcard correspondence to your patients, a record of the message is added to the Postcards section of the Correspondence Manager.

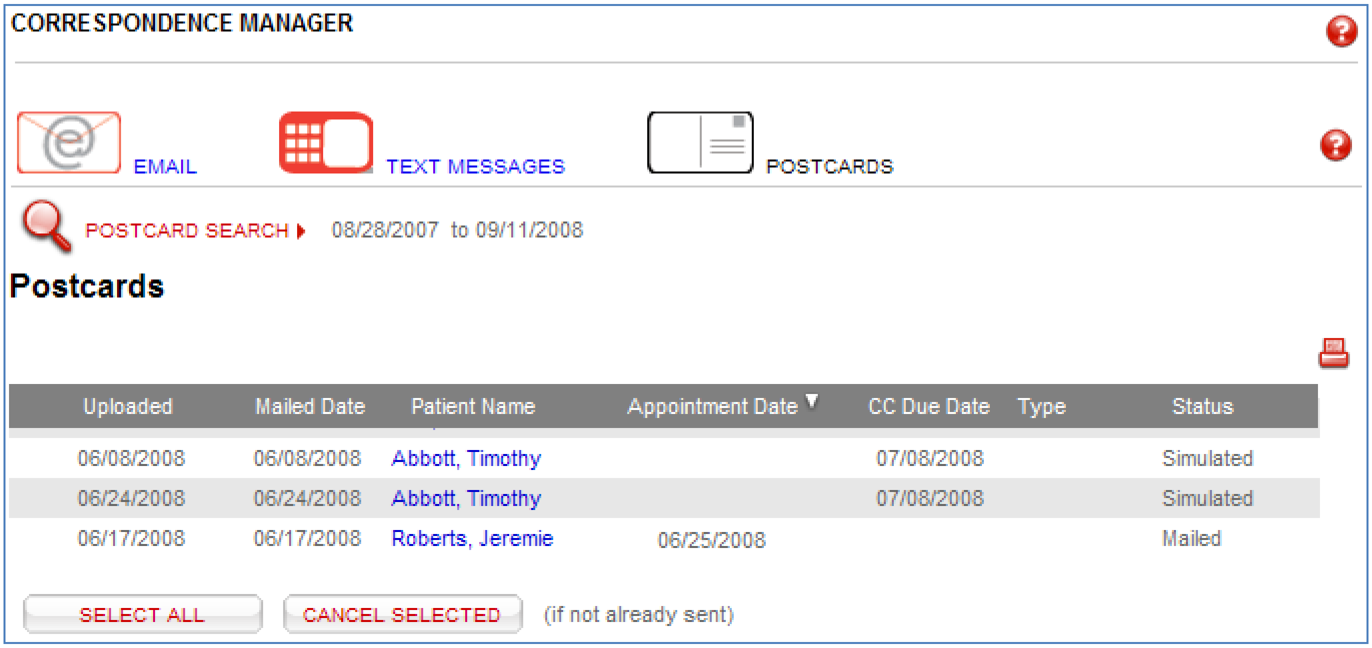
To display postcard message correspondence in the Correspondence Manager

1. From the **Communications** tab menu, click **correspondence reports**.

The Correspondence Manager appears.

2. Click **Postcards**.

Note: The list of postcards displayed are those that were scheduled or sent prior to upcoming appointments that are scheduled between the specified search dates. Only post cards that are associated with an appointment or continuing care due date that falls between those search dates are displayed in the list. See Searching for Post Cards below for more information.



This record contains the upload date, mailed date, patient name, appointment date, continuing care due date, type of correspondence that was sent, and the status of the Postcard.

You can sort your postcards by any of the categories listed. Click the name of the category to sort the list of postcards.

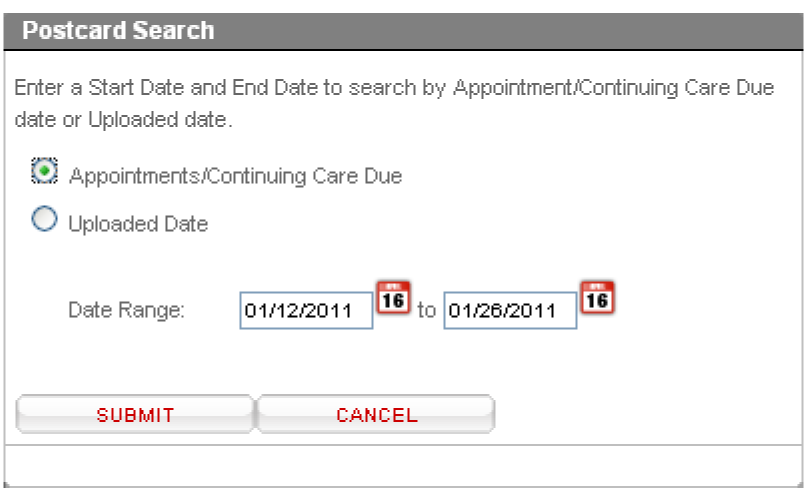
Searching for postcards

Using Correspondence Manager, you can search for a specific postcard.

To search for a specific postcard

1. Click **Postcard Search**.

The Postcard Search dialog box appears.



2. In the **Date Range** fields, specify a start date and end date to use for the search.

3. Click **Submit**.

All postcards that were sent regarding Appointments or Continuing Care within the specified date range are listed on the Postcards page. You may also search by Uploaded Date, by selecting the option. This will allow you to display all postcards uploaded by the WebSync in the specified date range.

Printing a postcard messages report

You can print the list of the postcard messages you have sent through eCentral.

To print the Text Messages Report

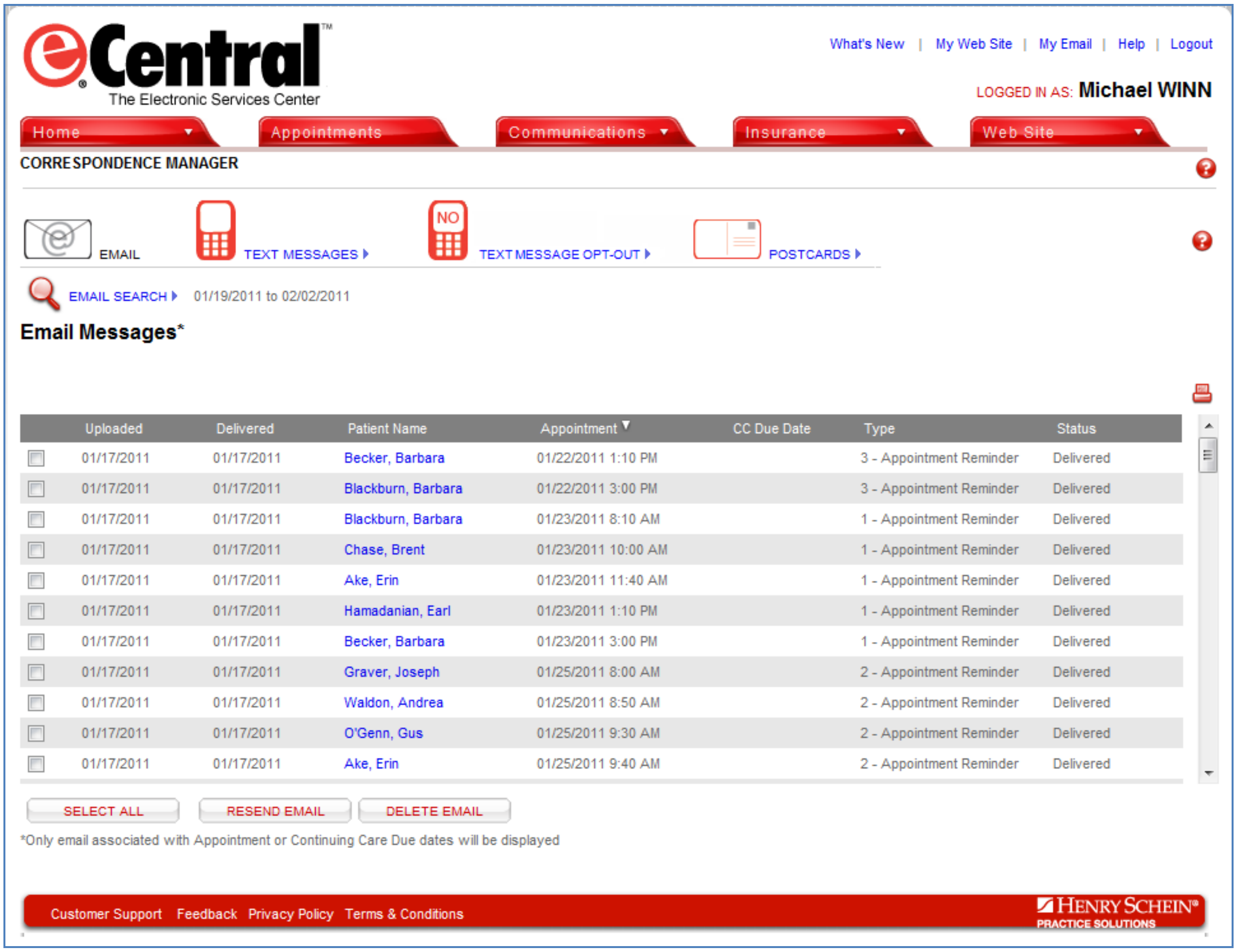
1. Click the Printable Version icon on the right side of the screen.

2. Click **Print**.

Viewing the Text Message Opt Out Report

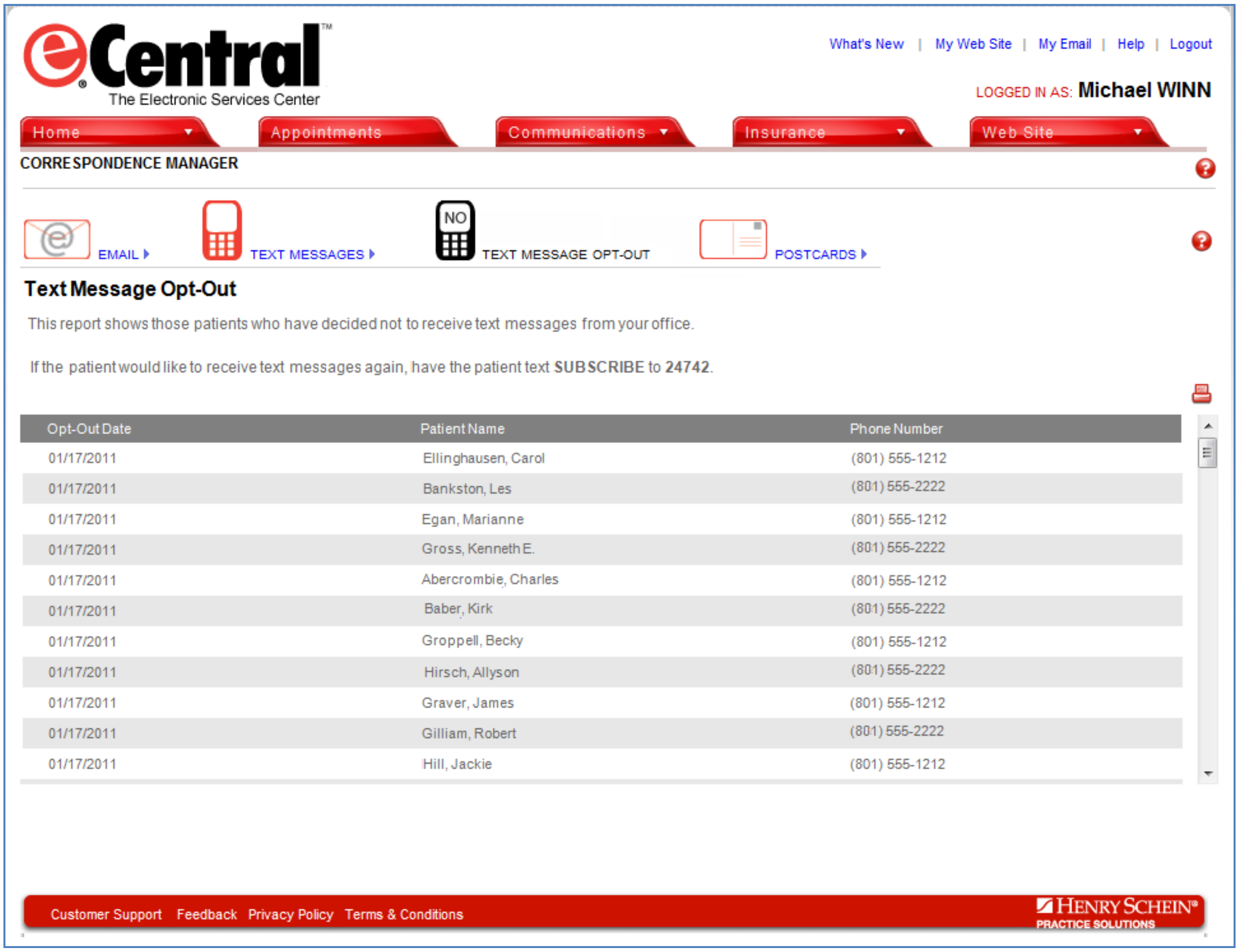
If patients don't want to receive text message reminders, they can opt out, and eCentral will not send them text message reminders. eCentral lets you view a Text Message Opt Out Report so you can see which patients have opted out of automated text message reminders. The report shows the opt-out date, the patient's name, the appointment date and time, and the patient's phone number.

The Correspondence Manager page appears.



1. Click **Text Message Opt-Out**.

The Text Message Opt-Out page appears.



Tip: To sort the list by any column, click one of the column headers.

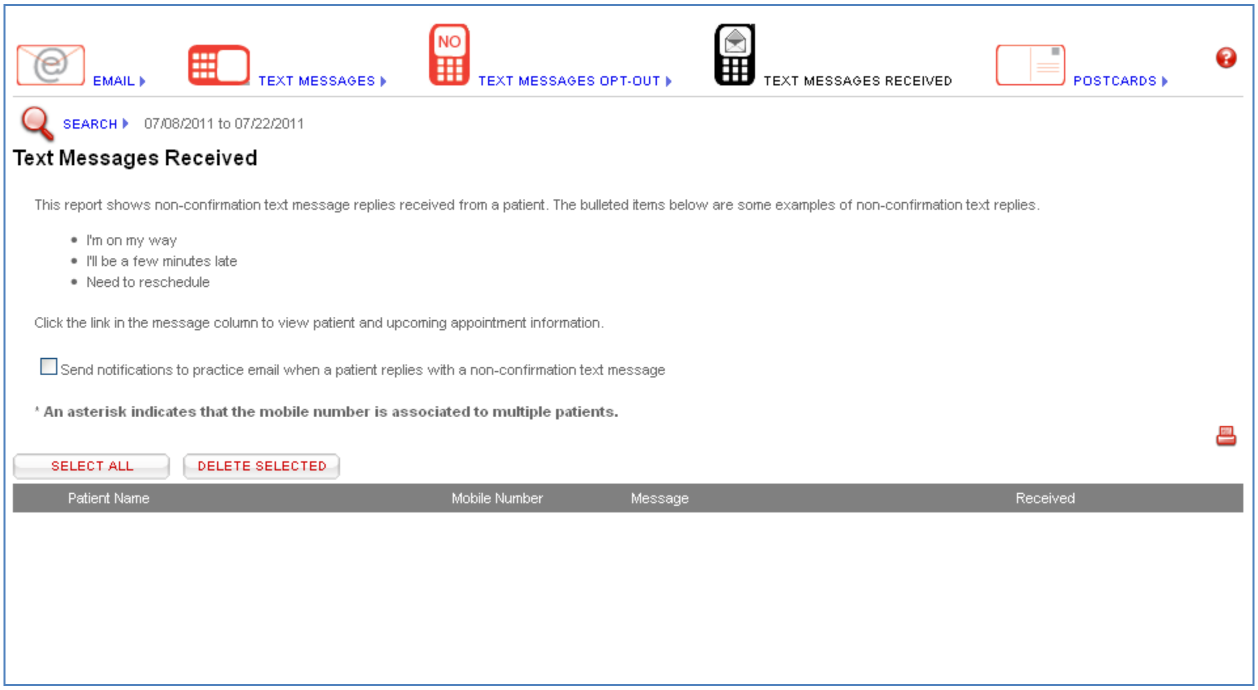
Note: The top of the report includes the instructions for a patient to opt-in so they can receive text message reminders.

Viewing the Text Messages Received

This report shows non-confirmation text message replies received from a patient.

1. In the Communication Manager, click **Text Messages Received**.

The Text Messages Received page appears.



2. If you would like to be sent an email at your office contact email address whenever a patient replies via text message, enable the option **Send notifications to practice email when a patient replies with a non-confirmation text message**. The message the patient replied with will be displayed on that email message that is received.

You may also view the patient's messages that they have replied with on this report, and also view the patient's appointment information that their text message was sent for.

Patient Newsletter

One of the best ways to inform your patients about the events in your office and in the field of dentistry is through a newsletter. eCentral gives you the option to send an electronic newsletter to your patients, saving you money on paper and postage.

Types of newsletters

You can send the following types of newsletters:

- **A text-only newsletter** - A text-only newsletter will not require your customers to open an attached file; you also won't need to worry about whether your customers have the software needed to view your attachment (such as Adobe Acrobat to view PDF files). However, text-only newsletters are simply text. There is no design, graphics, or layout to add visual interest or aid readability.

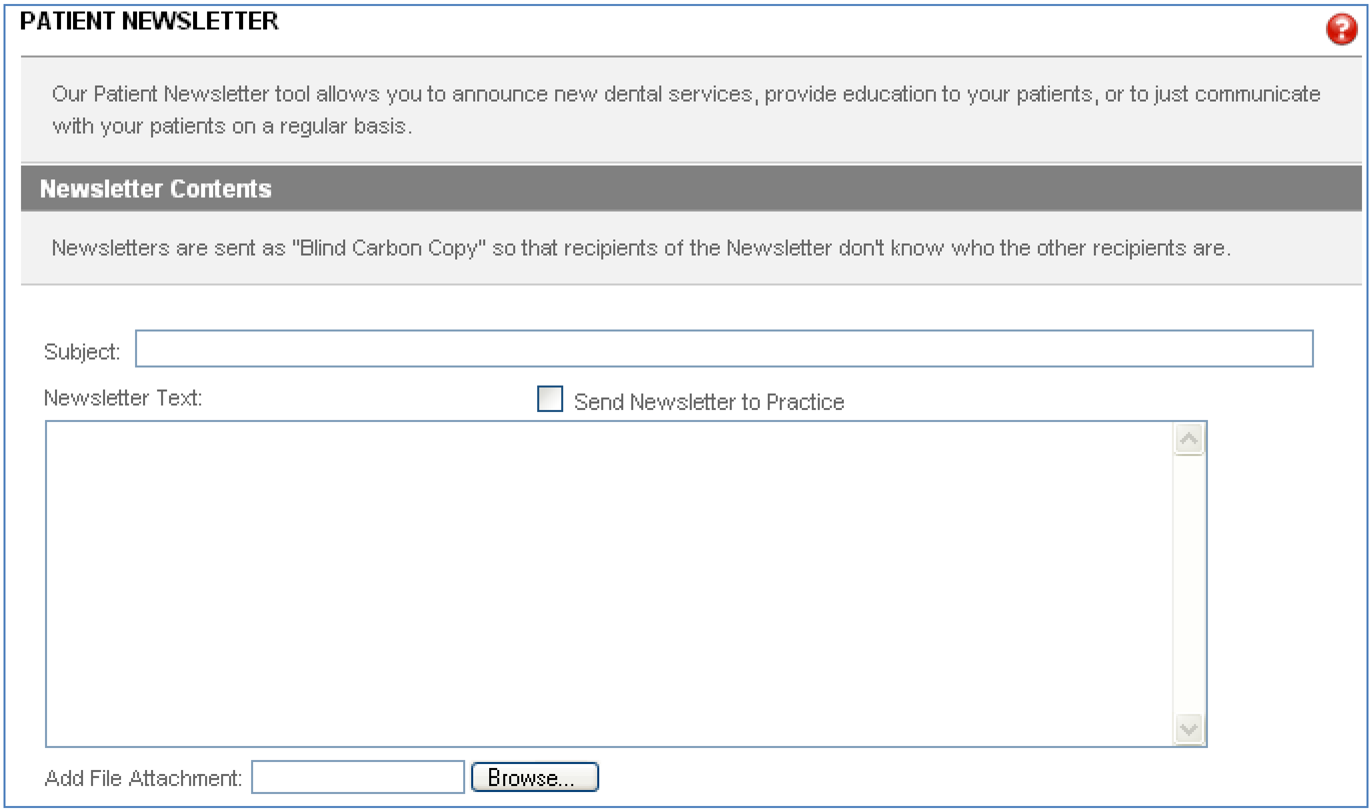
- **A newsletter that you create and publish using some other layout and design program** - You can create a traditional newsletter using a software program such as Microsoft Word, Microsoft Publisher, or Adobe InDesign, then publish the newsletter to a file that your customers can open and read. If you use this method, you should make sure you publish your newsletter in a common file format (such as RTF, PDF, DOC) that your customers will be able to read and open using software they have on their computer or can download for free.

- **Both** - You can also send both types of newsletters, by attaching the newsletter file, and also including the actual newsletter text in the body of the message.

To prepare an e-newsletter

1. From the **Communications** tab menu, click **send newsletter**.

The Patient Newsletter page appears.



2. In the **Subject** field, type the subject for the newsletter email message.

3. In the **Newsletter Text** field, type the newsletter text, or the email message that will introduce your attached newsletter file.

4. If you want a copy of the newsletter sent to your practice's email address (configured in the Practice Setup page), select **Send Newsletter to Practice**.

5. To add the newsletter you've created as an attachment, next to the **Add File Attachment** field click **Browse**, browse to the newsletter file, and then click **Open**. If you decide to remove the attachment, delete the file name and path from the **Add File Attachment** field.

Sending the e-newsletter

When your newsletter is ready to send, you need to decide who to send it to. **Note:** Only families who have been marked with a **Web Consent Date** (for the Guarantor/Head of Household) and have afterwards been uploaded by the WebSync's **Patient Upload** are available to receive the newsletter. For more information on how to assign a Web Consent Date for a family, see **Patient Settings**.

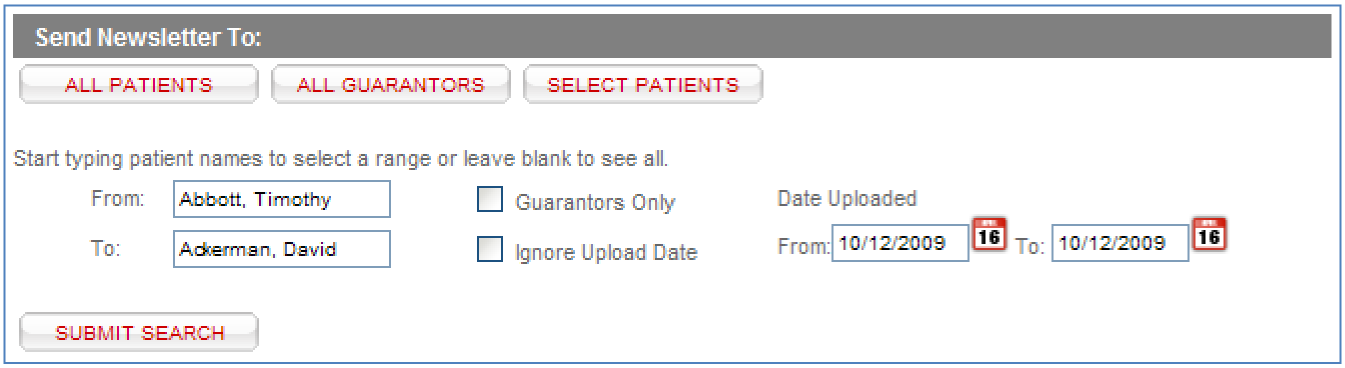
To send the e-newsletter

1. Click one of the following buttons to specify who you want to send the newsletter to:

- **All Patients** - This option sends the newsletter to the email addresses for all family patients uploaded with Web Consent

- **All Guarantors** - This option sends the newsletter to only the email addresses of the guarantors uploaded with Web Consent.

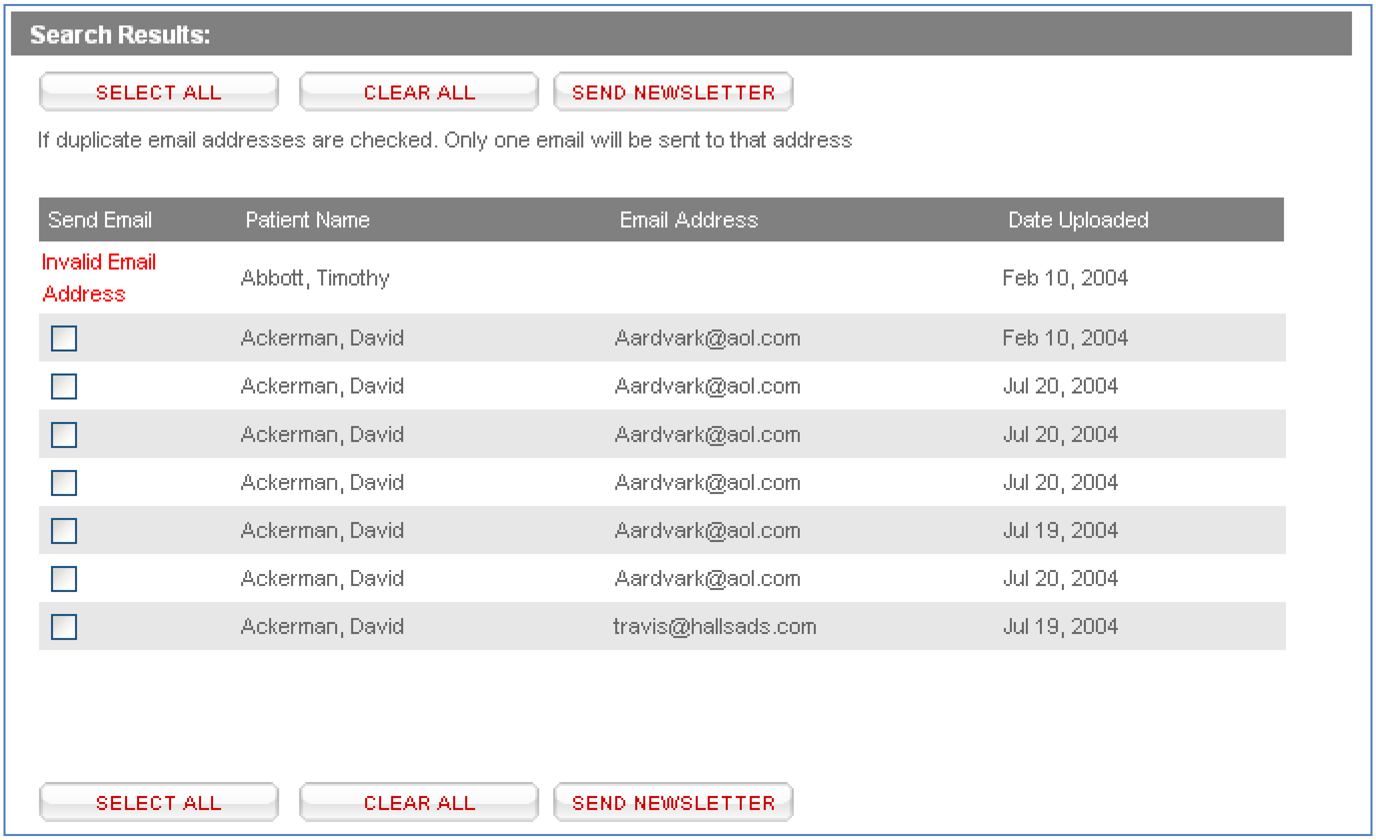
- **Select Patients** - Using this option, you can select the patients you want to receive the newsletter using the fields shown here:



Clicking **Select Patients** allows you to search for patients by name. This can take time if you have a long list of patients, so you may want to narrow your name search by selecting **Guarantors Only** to include only guarantors in your search list. You can also enter a **Date Uploaded** range to narrow the search to patients whose information was uploaded to your eCentral Web site within the specified date range. (If you want to disregard the upload date, select **Ignore Upload Date**.) If you want to narrow the search to a range of names (sorted alphabetically by last name, then first name), in the **From** and **To** fields, specify the name range, as shown in the example above.

2. Once you have entered the filters by which you want to search, click **Submit Search.**

The search results will be displayed in the Search Results list.



3. Using the checkboxes next to the patient names, select the patients you want to receive a newsletter.

or

Click **Select All** to select all patients in the list.

Notes:

- If a duplicate email address is selected, only one email will be sent to that address.
- Newsletters are sent as Blind Carbon Copy so that the recipients of the newsletter do not see the email addresses of other recipients.

4. Once you have selected the patients to whom you would like to send the newsletter, click **Send Newsletter**.

A message will appear letting you know that the newsletter has been sent successfully.

Referral Manager

You can use eCentral to send electronic referrals to other dental professionals and collect referrals patients send to your practice. Once you have sent referrals, you can track the professional referrals sent, professional referrals received, and patient referrals received. You can also edit the email that will be sent to referred patients.

In the Referral Manager, you can also view your professional contact list (the list of all other dental professionals who use eCentral) and set up a personal contact list of dental professionals with whom you work frequently.

In order to send referrals, you must set up the provider(s) to whom you will be sending referrals in your practice management software, your eCentral Web site, and the DXWeb or EasyWeb Toolbar.

Setting Up referrals in eCentral

Before you can send electronic referrals to other providers, you must make sure the provider to whom you want to send a referral has an ident.com account. You can search to see if a provider has an ident.com account using the Professional Contact list in the eCentral Referral Manager.

To set up referrals in the Referral Manager

1. From the **Communications** tab menu, click **professional contact list**.

The Professional Contact List page appears.

2. You can search by specific information by clicking **Search Professional Contacts**, then using the **Last Name**, **First Name**, **Specialty**, **State/Province**, **City**, and **Zip Code** fields. Enter the information you want to search by and click **Search** to bring up a list of providers who match the search criteria. Click the first letter of the provider's last name to populate a list of all providers by last name.

If the provider is on the list, they have an ident.com account and you can upload referrals for them. If you cannot find the provider on the list, they do not have an ident.com account and must at least sign up for a free ecentral.ident.com account before you can upload patient referrals to them.

Note: The Contact List displays the specialty, provider name, and user name of each provider. Take note of the user name of the providers you are searching for, as you will need this user name later in the referral setup process.

3. If the provider is one with whom you will be working and sending referrals more than once, add them to your personal contact list. To add a provider to your personal contact list, find them in the Professional Contact List. When you have found the provider on that list, click **Add** to add them to the Personal Contact List.

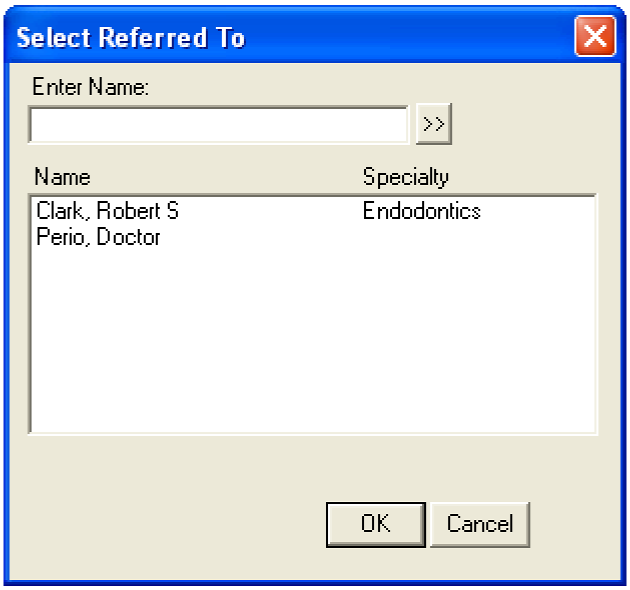
Note: The Personal Contact List contains only those providers you have added to it, so it is easier to search through when you are trying to locate a specific provider's information.

Setting Up Referrals in DXWeb

You must set up referral providers in the Referral Setup section of the DXWeb toolbar before you can upload referrals to that provider.

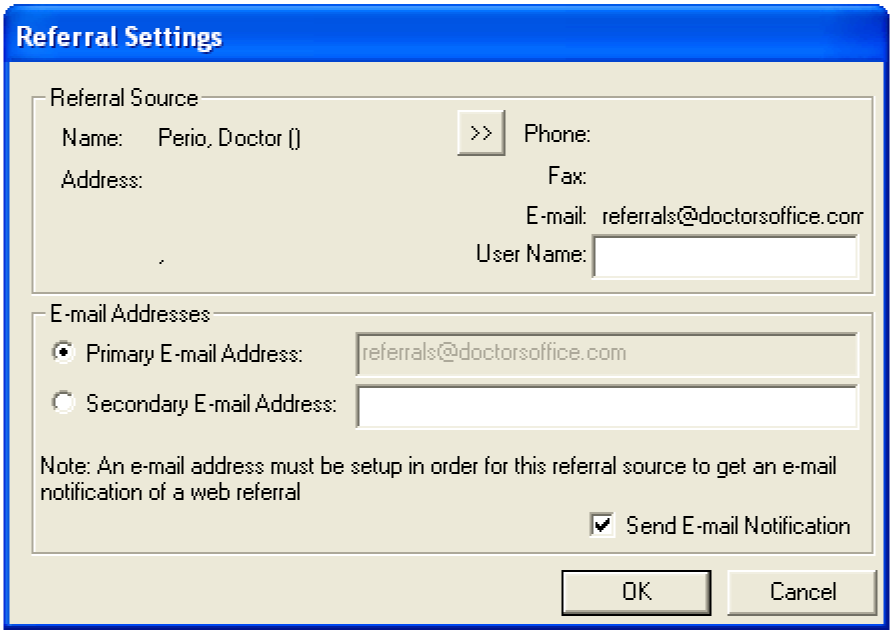
To set up Referrals in DXWeb

1. In the DXWeb Toolbar, click **Settings > Referral Setup**. The Select Referred To dialog box appears.



2. You can either select the provider's name in the list or search for the desired provider by entering the first few letters of the provider's last name in the **Enter Name** field and clicking the search button. When you have selected the desired provider, click **OK**.

The Referral Settings dialog box appears, and the contact information (Name, Address, Phone, Fax, and Email address) of the referral provider you have selected appears in the Referral Source group box.



3. Verify that the information is correct. If you need to change any of the provider's contact information, open the Office Manager and click **Maintenance > Reference > Referral Maintenance**, select the provider, and click **Edit** to edit the provider's contact information.

4. Enter the user name you found in the Professional Contact List of the eCentral Web site. If you do not have the user name, open the eCentral Web site, click the **Referral Center** tab, click the **Professional Contact List** link, search for the desired provider, and copy the provider's Referral Number from the **Referral Number** column into the **User Name** field of the Referral Settings dialog box.

5. Select the email address to use when sending referral notifications to the provider. You can use the provider's **Primary Email Address** that was set up in the Office Manager, or you can select a **Secondary Email Address** to use instead of the primary email address. If you don't want to send email notifications of referrals, clear the **Send Email Notifications** box.

Once you have set up referrals in the DXWeb toolbar, in the Patient Chart, when editing one or more Treatment Plans for a patient, under the "Related Referral" field you can select the "Referred to" doctor that was set up in the DXWeb toolbar to mark that procedure for referral, and then set up the Referral Upload to send referrals during the WebSync, or the Referral Upload Override to send a few referrals at a time without running the WebSync. You may also send referrals manually in the Patient Chart by selecting the patient, and selecting File | Send Referral Via Web, which also allows you to attach images to be sent with the referral (only supported with Dexis and Dentrix Image integrated software). **Note:** In order to send a patient as a referral, the patient needs to give Web Consent. See **Setting up Patient Account Access.**

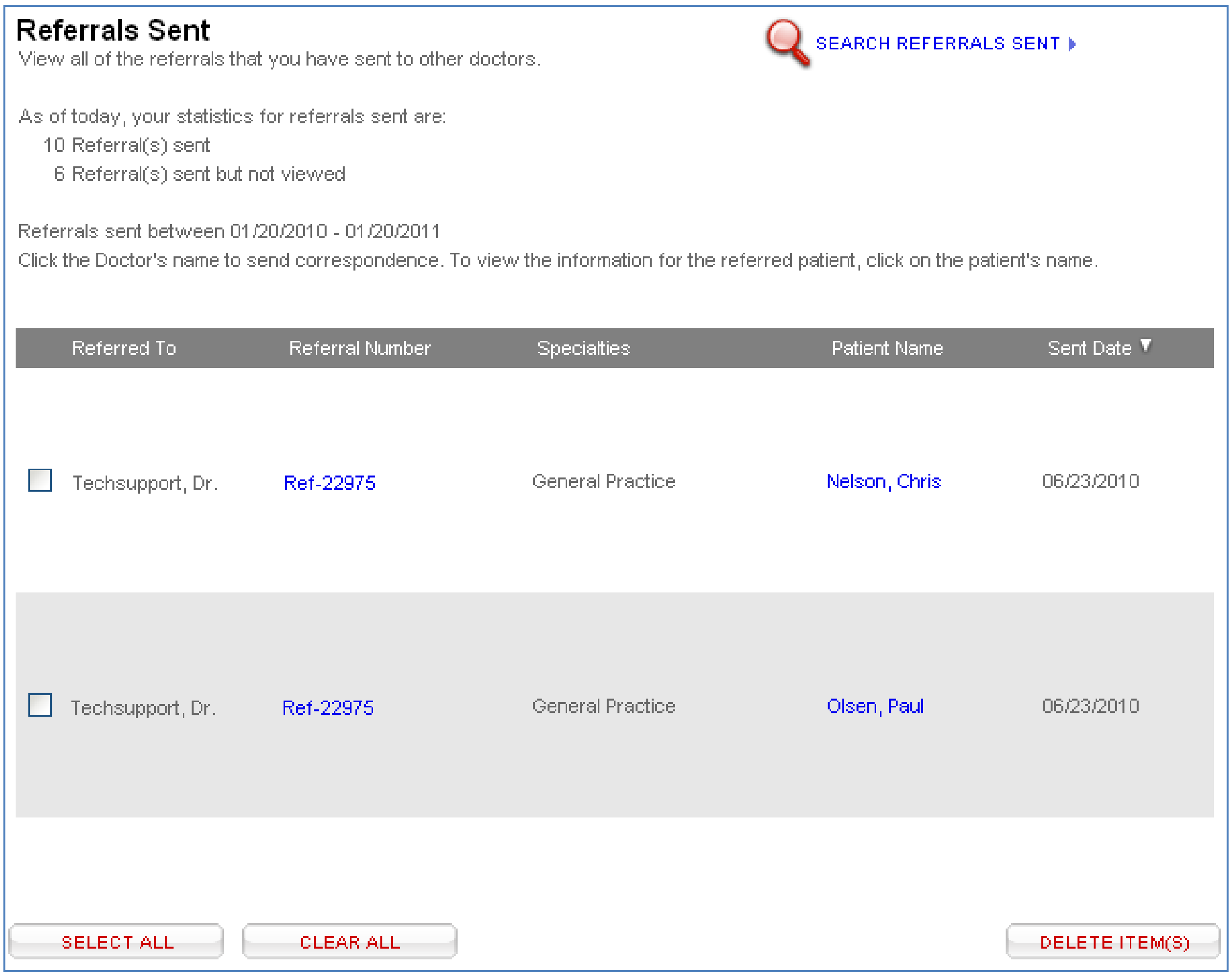
Professional Referrals Sent

Using Referral Manager, you can view the referrals that have been sent from your office.

To view the referrals that have been sent from your office

1. From the **Communications** tab menu, click **referrals**.

2. Under **Professional Referrals**, click **Sent**.



You can view the total number of referrals sent from your office, search for a specific referral, delete referrals, or send correspondence to doctors to whom you are sending referrals.

The total number of referrals sent from your office is shown at the top of the Referrals sent frame. The total number of referrals that have been viewed is shown beneath the total number of referrals sent.

Referral search

You can search for specific referrals that have been sent from your office.

To do a referral search

1. From the **Referrals Sent** page, click **Search Referrals Sent.**

2. Enter the search criteria you want to use in the following fields:

- **Referred By** - The last and first name of the person who sent the referral, such as Smith, Mike.
- **Specialties** - Select one of the dental specialties from the list.
- **Referral Number** - The referral number of the person who sent the referral, such as Ref-22740.
- **Patient Name** - The last and first name of the patient who was referred, such as Smith, Mike.
- **Start Date** - Enter a start date by typing a date or clicking the calendar button to open the calendar and select a date.
- **End Date** - Enter an end date by typing a date or clicking the calendar button to open the calendar and select a date.

3. Click **Submit**.

Viewing Sent Patient Referral Information

To view the information that is part of the referral, simply click on the name of the patient. It will display various details, such as general patient information, procedures, and even images if any were sent with the referral.

Printing the Referrals Sent Report

You can print the referrals you have sent.

To print the Referrals Sent report

1. Click the Printable Version icon on the right side of the screen.

A new window opens that displays the Referrals Sent Report.

2. Click **Print**.

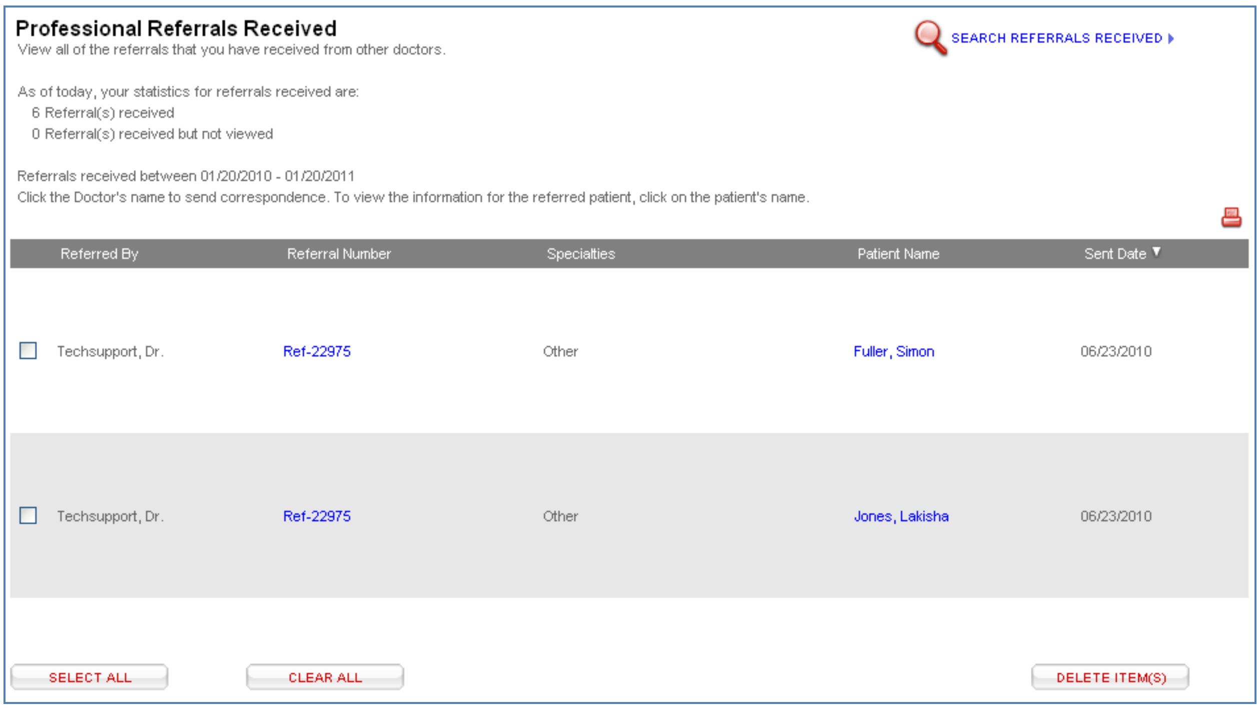
Professional Referrals Received

Using Referral Manager, you can view the referrals that have been sent from your office.

To view the referrals that have been received by your office

1. From the **Communications** tab menu, click **referrals**.

2. Under **Professional Referrals**, click **Received**.



In this window, you can search for and view referrals that have been sent to your office from other professionals.

The total number of referrals received by your office is shown at the top of the Referrals Sent frame. The total number of referrals that have been viewed is shown beneath the total number of referrals received.

Referral search

You can search for specific referrals that have been received by your office.

To do a referral search

1. From the **Professional Referrals Received** page, click **Search Referrals Received.**

2. Enter the search criteria you want to use in the following fields:

- **Referral Number** - The First Name and Last Name of the person who sent the referral, such as Ref-22975.
- **Contact Name -** The First Name and Last Name of the referral contact (if different).
- **Start Date** - Enter a start date by typing a date or clicking the calendar button to open the calendar and select a date.
- **End Date** - Enter an end date by typing a date or clicking the calendar button to open the calendar and select a date.

4. Click **Submit**.

Viewing Received Patient Referral Information

To view the information that is part of the referral, simply click on the name of the patient. It will display various details, such as general patient information, procedures, and even images if any were sent with the referral.

Print Referrals Received Report

You can print the referrals you have received.

To print the Referrals Received Report

1. Click the Printable Version icon on the right side of the screen.

A new window opens that displays the Referrals Received Report.

2. Click **Print**.

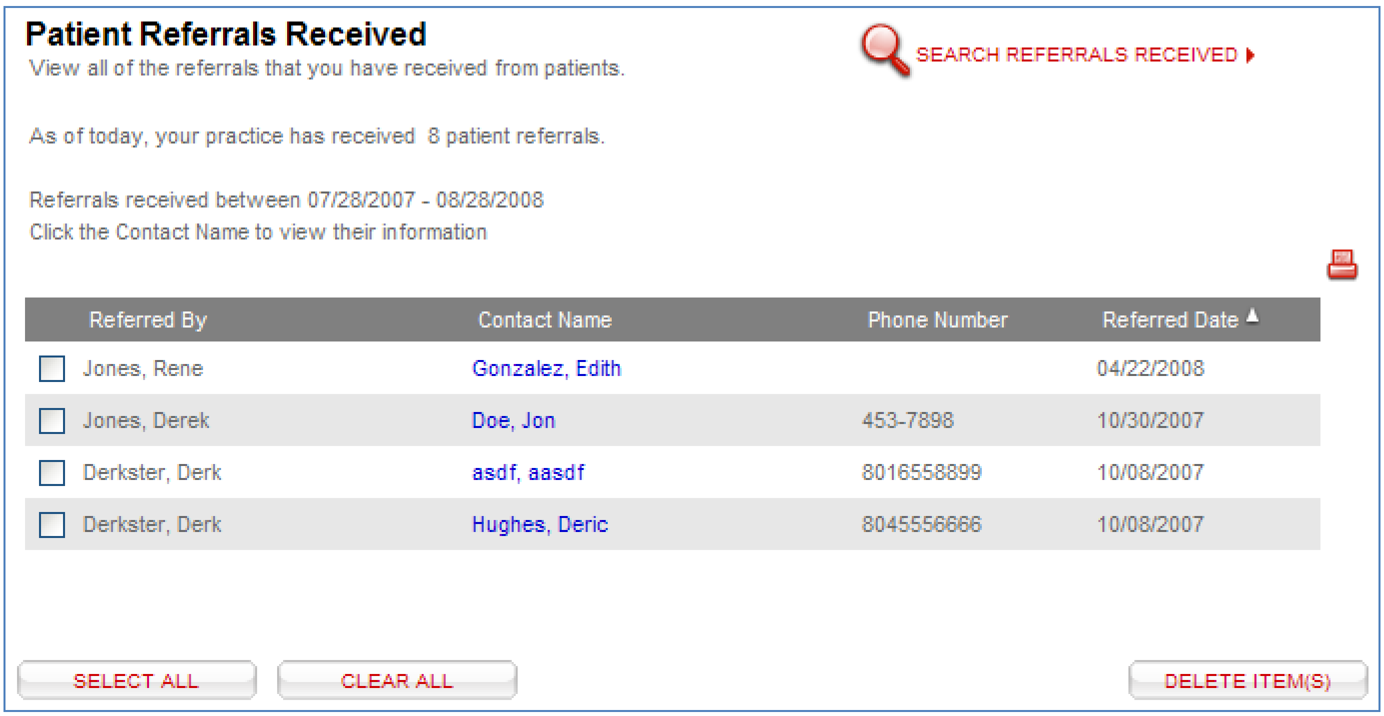
Patient Referrals Received

Using Referral Manager, you can view the patient referrals that have been received by your office. The ability for patients to refer their friends thru eCentral is a feature associated with the eCentral Template Website, or if requested, for websites customized through eCentral services. If this feature is enabled in the Website Manager, each time a patient completes a Satisfaction Survey they will be taken to the eCentral template website where they can refer their friends.

To view the patient referrals that have been received by your office

1. From the **Communications** tab menu, click **referrals**.

2. Under **Patient Referrals**, click **Received**.



In this window, you can search for and view patient referrals that have been received by your office.

The total number of referrals received by your office is shown at the top of the Patient Referrals Received frame. The total number of referrals that have been viewed is shown beneath the total number of referrals received.

Referral search

You can search for specific referrals that have been received by your office.

To do a referral search

1. From the **Professional Referrals Received** page, click **Search Referrals Received.**

2. Enter the search criteria you want to use in the following fields:

   - **Referred By** - The First Name and Last Name of the person who sent the referral, such as Smith, Mike.

   - **Contact Name -** The First Name and Last Name of the referral contact (if different).

   - **Start Date** - Enter a start date by typing a date or clicking the calendar button to open the calendar and select a date.

   - **End Date** - Enter an end date by typing a date or clicking the calendar button to open the calendar and select a date.

3. Click **Submit**.

Print Referrals Received Report

You can print the referrals you have received.

To print the Referrals Received Report

1. Click the Printable Version icon on the right side of the screen.

A new window opens that displays the Referrals Received Report.

2. Click **Print**.

Disabling the Patient Referral Feature

If you wish to disable the Patient Referral feature

1. From the **Web Site** tab menu, click **manage my site**.

2. Select **Practice Info & Web site Settings.**

3. Select **No** to the “Allow patients to refer friends from your site?” option.

4. Click **Finish.**

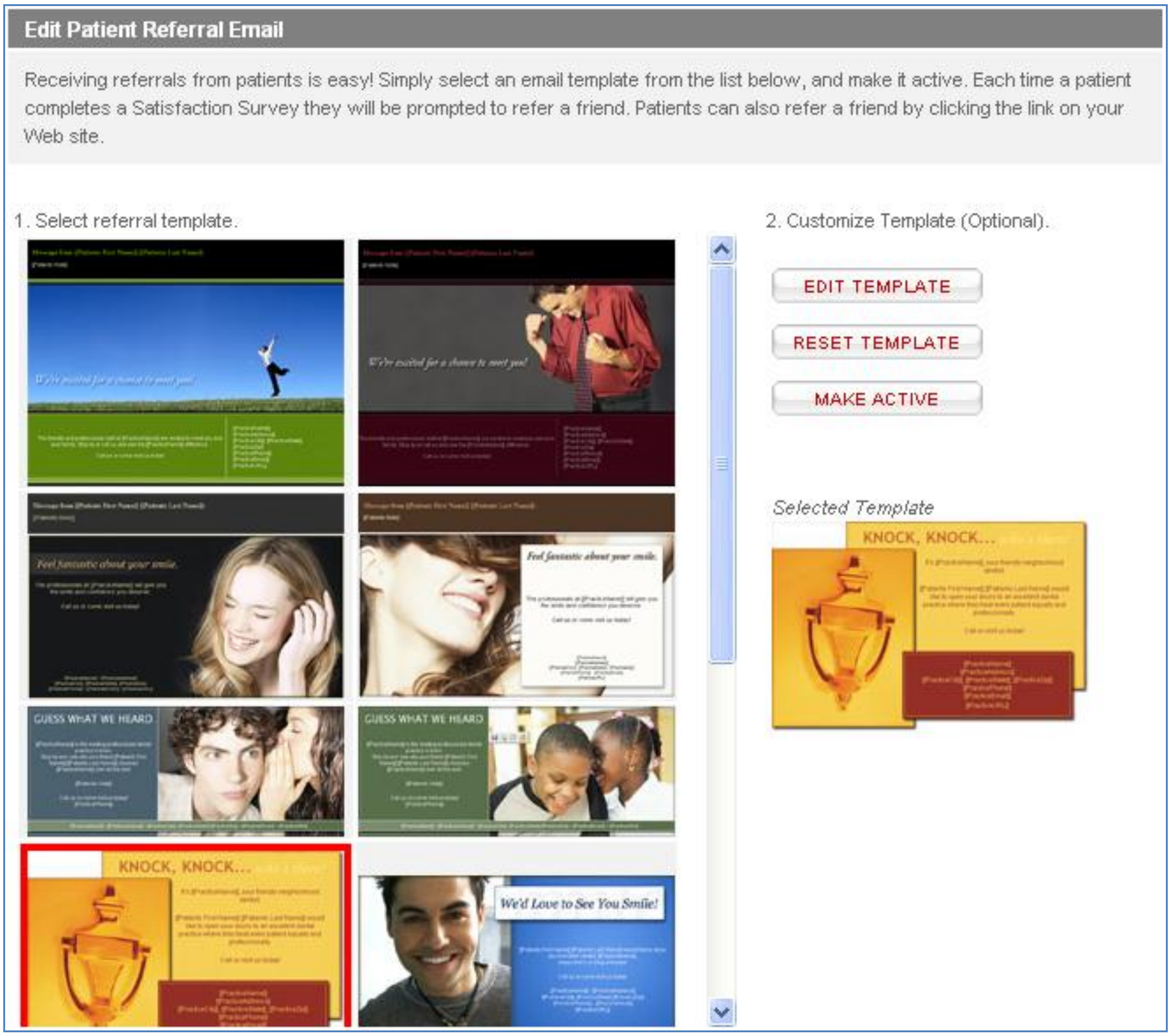
Edit Referral Email

One of the best ways to build your practice is through patient referrals. You can help make this easy by creating a custom template for patients to use. Whenever a patient refers a friend through the eCentral template website, the email template that is selected and activated will be delivered to the friend's email address, which will display your office contact information, and invite the friend to your practice. The email template may also be customized.

To customize a patient referral template:

1. From the **Communications** tab menu, click **referrals**.

2. Under **Referral Email**, click **Edit**.



Several templates are displayed in the Patient Referral Library.

3. Select a template to be used for your patient referral page.

4. To customize the template, click **Edit Template**.

The Edit Referral window appears. Use the tools in the window to customize the text and graphics. When you have made changes, click the **Preview** tab to preview the template as it will appear when delivered by email.

When you have finished making changes to the template, click the Save icon to save your changes.

5. When you click **Make Active**, a red border is placed around the selected template and the template is displayed to the right of the Patient Referral Library.

Note: If you do not like the changes you have made or you would like to start over, click **Reset Template**.

Receive Notification Email

You stay informed about the health of your practice by being notified each time a new patient is referred to your office.

To have an email sent to you each time a new patient referral is sent

1. From the **Web Site** tab menu, click **manage my site**.

2. Select **Practice Info & Web site Settings.**

3. Select the **Email me each time a patient is referred** check box next to the “Allow patients to refer friends from your site?” option.

4. If you would like the email notification to be sent to an address other than your default practice email address (specified in Practice Setup), in the **Email** field, type the address to which you would like the referral notifications to be sent to.

5. Click **Finish.**

Professional contact list

To help you stay connected to other professionals in your field, eCentral provides you with a Professional Contact List. This list contains other professional offices with an ident.com account. You can use this list to find new professionals to work with. You can find these professionals by searching or by viewing a list by letter.

To use the professional contact list

1. From the **Communications** tab menu, click **professional contact list.**

2. Click one of the letters to display a list of all providers for that letter.

or

Click **Search Professional Contacts** and use any of the criteria provided to search for a specific contact.

Viewing professional contacts

Using the Professional Contact List, you can view information about professional contacts, contact them via email, find their referral numbers to set up eCentral Professional Referrals, and add providers from the Professional Contact List to your Personal Contact List.

To view information about a contact

1. Click the name of the contact.

2. When you finish viewing the contact information, click **Close**.

To contact a provider in the Professional Contact List

1. In the Professional Contact List, click **Contact** next to the contact to whom you want to send an email message.

2. In the **Subject** box, type the subject of the email message.

3. In the **Message** box, type the text of the email message.

4. If you want to include your practice's phone number, select **Include a from office phone number**.

5. Click **Submit**.

To add providers from the Professional Contact List to the Personal Contact List

- In the Professional Contact List, click **Add** next to the contact you want to add to your Personal Contact List.

Notes:

- Once a provider has been added to your personal contact list, you can view that provider's information in either the Professional Contact List or your Personal Contact List.
- If a contact already exists in your Personal Contact List, when you try to add the contact, a message appears that states "The contact is already in your personal contact list."

Personal Contact List

To help you keep track of other professionals with ident.com accounts, you may add providers from the Professional Contact List to your Personal Contact List. This list will only display providers that you have added. You can also view your contacts by searching or by viewing a list by letter.

To use the personal contact list

1. From the **Communications** tab menu, click **personal contact list.**

You should now be able to view all of your personal contacts.

If you wish to narrow down the list of providers further, you may click one of the letters to display a list of all providers for that letter, or click **Search Personal Contacts** and use any of the criteria provided to search for a specific contact.

Viewing personal contacts

Using the Personal Contact List, you can view information about personal contacts, contact them via email, find their referral numbers to set up eCentral Professional Referrals, and remove providers from your Personal Contact List.

To view information about a contact

1. Click the name of the contact.

2. When you finish viewing the contact information, click **Close**.

To contact someone in the Personal Contact List

1. In the Personal Contact List, click **Contact** next to the person to whom you want to send an email message.

2. In the **Subject** box, type the subject of the email message.

3. In the **Message** box, type the text of the email message.

4. If you want to include your practice's phone number, select **Include a from office phone number**.

5. Click **Submit**.

To remove providers from your Personal Contact List

- In the Personal Contact List, click **Remove** next to the contact you want to remove from your Personal Contact List.

Notes:

- Once a provider has been added to your personal contact list, you can view that provider's information in either the Professional Contact List or your Personal Contact List.
- If a contact already exists in your Personal Contact List, when you try to add the contact, a message appears that states "The contact is already in your personal contact list.

Practice Statistics

eCentral makes it easy to view certain correspondence statistics, including the statistics about patient survey satisfaction scores, email appointment correspondence, text message appointment correspondence, postcard appointment correspondence, patient referrals, and provider referrals. By default, the survey statistics reflect cumulative totals (except the satisfaction scores, which are shown for the past month, past six months, and past year).

To display correspondence statistics

- From the **Communications** tab menu, click **practice statistics**.

The Practice Statistics page appears.

PRACTICE STATISTICS

STATISTICS SEARCH

Patient Satisfaction Scores [manage surveys]

Survey Statistics

Total Surveys From Email	2
Total Surveys From Web site	3
Completed Surveys	3
Partial Surveys	2
Unanswered Email Surveys	32

Satisfaction Scores

	Total	Past Month	Past Month 6	Past Month 12
Great	26	26	26	26
Good	7	7	7	7
Okay	0	0	0	0
Fair	0	0	0	0
Poor	0	0	0	0

Appointment Correspondence [manage correspondence]

Email Messages

Delivered	0	100%
Viewed	0	0 %
Confirmed	0	0 %
Undeliverable	0	0 %

Text Messages

Delivered	0	0 %
Scheduled	0	0 %
Cancelled	0	0 %
Invalid Number	0	0 %

Post Cards

Mailed	0	0 %
Scheduled	0	0 %
Insufficient Time	0	0 %
Incomplete Address	0	0 %
Cancelled	0	0 %

Electronic Referrals [manage referrals]

Patient Referrals

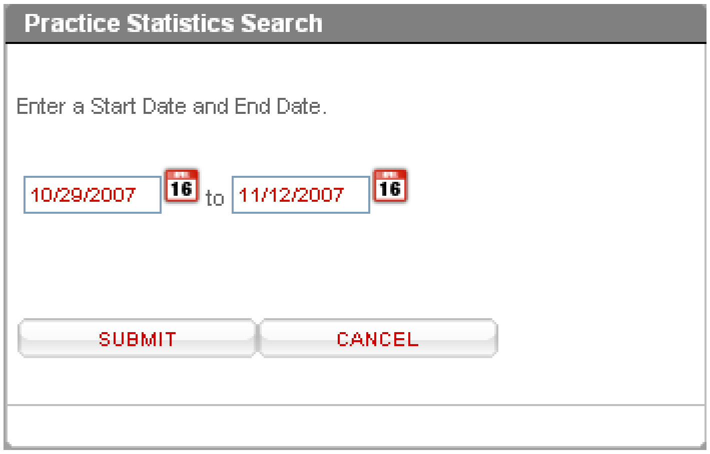
Received	0

Provider Referrals

Sent	0
Received	0

Search by Date Range

You can narrow the scope of the Appointment Correspondence and Electronic Referrals practice statistics by clicking **Statistics Search** and specifying a narrower date range in the dialog box that appears. When you click **Submit**, the statistics will be recalculated to reflect the statistics for the specified date range.


Practice Statistics Search
Enter a Start Date and End Date.
10/29/2007
to
11/12/2007
SUBMIT
CANCEL

Patient Settings

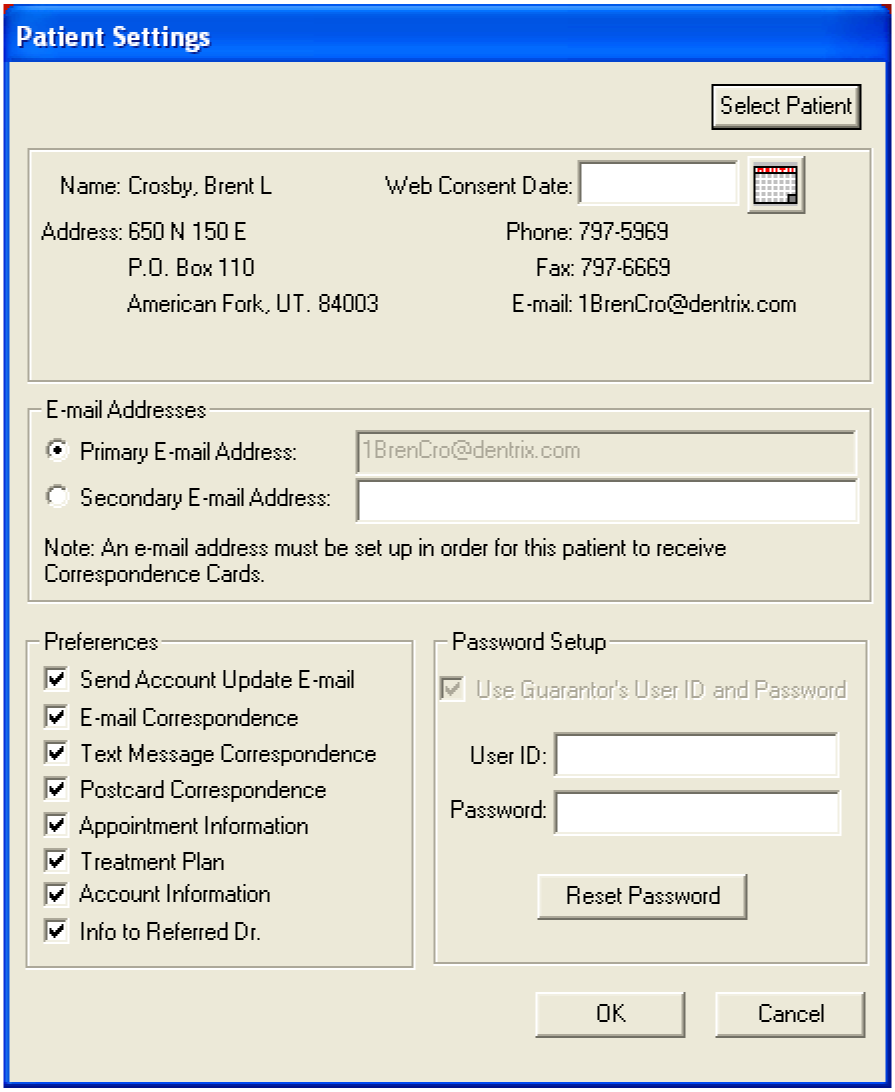
The Patient Setup/Settings area of the toolbar allows you to limit and specify what reminders a patient will receive, and is also where you assign Web Consent dates. This is also the area to change settings for a patient's login account for the Website Manager.

To set up patient preferences and Web Consent in the Toolbar

1. On the toolbar of your practice management software (such as DENTRIX or EasyDental), click **Settings**, and then click **Patient Setup**.

2. If you do not have a patient selected, the Select Patient dialog box appears; select a patient to continue.

If you have a patient selected, the Patient Settings dialog box appears.



3. In order for a patient to have their information posted to a Web site, to be able to have eCentral email newsletters delivered to, or to send the patient's information as a referral to another office using eCentral's Professional Referrals, the patient must sign a Web Consent form. In the Web Consent Date box, enter the date of consent, or click **Insert Today's Date** if the patient consented today. **NOTE:** for patient login accounts and newsletters, if using Dentrix G4 Productivity Pack 7 or later, the Web Consent date needs to be entered for the Guarantor of the family.

4. DENTRIX and EasyDental have a consent form letter on the server in the Letter Template Path specified in the Preferences dialog box. To find this letter:

a. Open the Office Manager.

b. From the **Maintenance** menu, point to **Practice Setup**, and click **Preferences**.

c. Select the **Paths** tab and note the **Letter Template Path**. In MS Word, open the file webcsnt.doc that is stored at this location. The template can be added as a Quick Letter. (See adding Quick Letters in the Users Guide of your practice management software.)

5. The Primary Email Address will be pulled from the patient's Family File. Enter a secondary (if applicable) email address in the field provided if the patient wants correspondence to be delivered to an email address other than the primary email address. Mark the address you wish to use for email correspondence.

6. Select the ways that the patient would prefer to receive correspondence. **Note**: all are enabled by default for each patient until changed.

- **Email Correspondence –** If enabled, email correspondence (appointment and due reminders, and email surveys) are be able to be sent to the selected patient's email address. Disabling this option will not allow these reminders for this patient.

- **Text Message Correspondence –** If enabled, text correspondence (appointment reminders) are able to be sent to the selected patient's cell phone via text message. Disabling this option will not allow these reminders for this patient.

- **Postcard Correspondence –** If enabled, postcard correspondence (appointment and due reminders) are able to be sent to the selected patient’s address listed in their patient information. Disabling this option will not allow these reminders for this patient.

- **Info to Referred Dr -** Sends referral information to the office's secure Web page for the Referred To doctor if the patient falls within the parameters in the Referral Upload Setup (see the previous section). If this option is NOT checked, the patient will be skipped during the referral upload, even with a Web Consent date marked.

7. Click **OK** to save your changes.