



PatientHomePage™

Version 3.0 User Guide

Published: June 8, 2015

Table of Contents:

Provider Portal

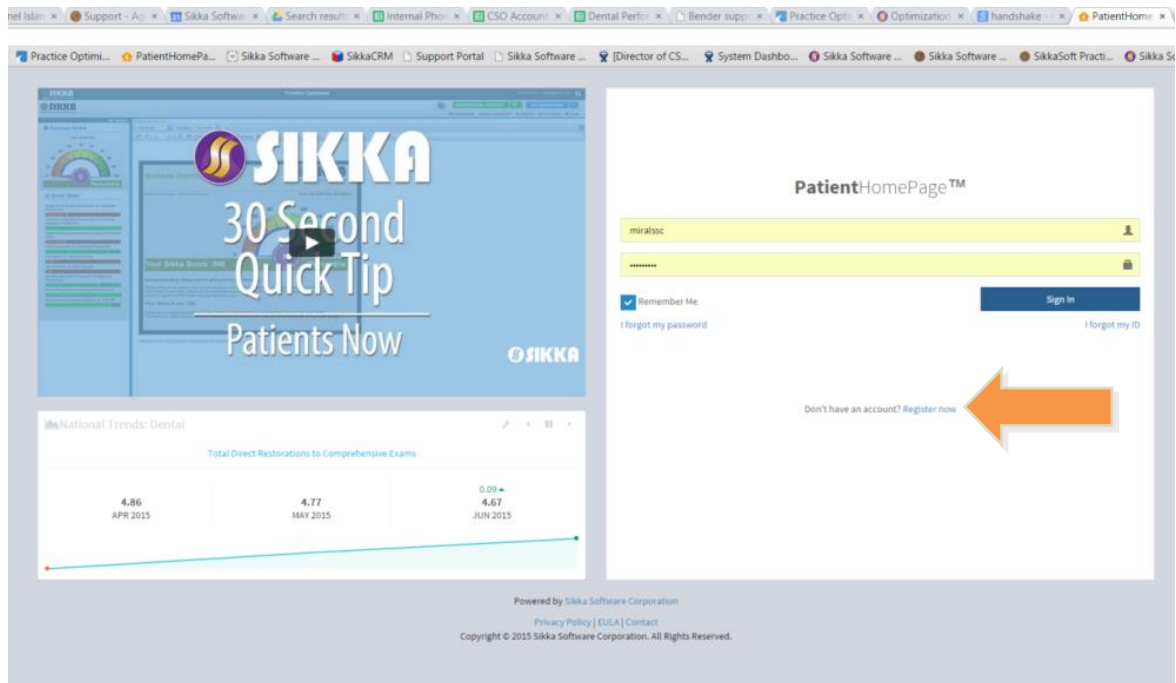
Signing Up for a PatientHomePage™ Provider Account	3
Signing In To Your PatientHomePage™ Provider Account	5
Navigating Your PatientHomePage™ Provider Home Page	6
Using Your PatientHomePage™ Navigation Menu Elements	17
Using Your PatientHomePage™ Patients Now® Scheduling App	24
Using the PatientHomePage™ Campaigns	32
Setting Up Your PatientHomePage™ Account	51

Patient Portal

Signing Up for a PatientHomePage™ Patient Account	66
Signing In To Your PatientHomePage™ Patient Account	68
Navigating Your PatientHomePage™ Patient Account	69
Using Your PatientHomePage™ Navigation Menu Elements	73
Request an Appointment	85
Send a Message	86
Refer a Friend	87

1. Signing Up for a Patient HomePage™ Provider Account

1. Go to: <http://php.sikkasoft.com/home.htm>
2. Click on “Register now” link



3. Fill out the online form (next page), agree to to the terms, and click “Submit” button
Note: Make sure you remember your User ID and Password. You will need these to sign in to your new **Patient HomePage™** account

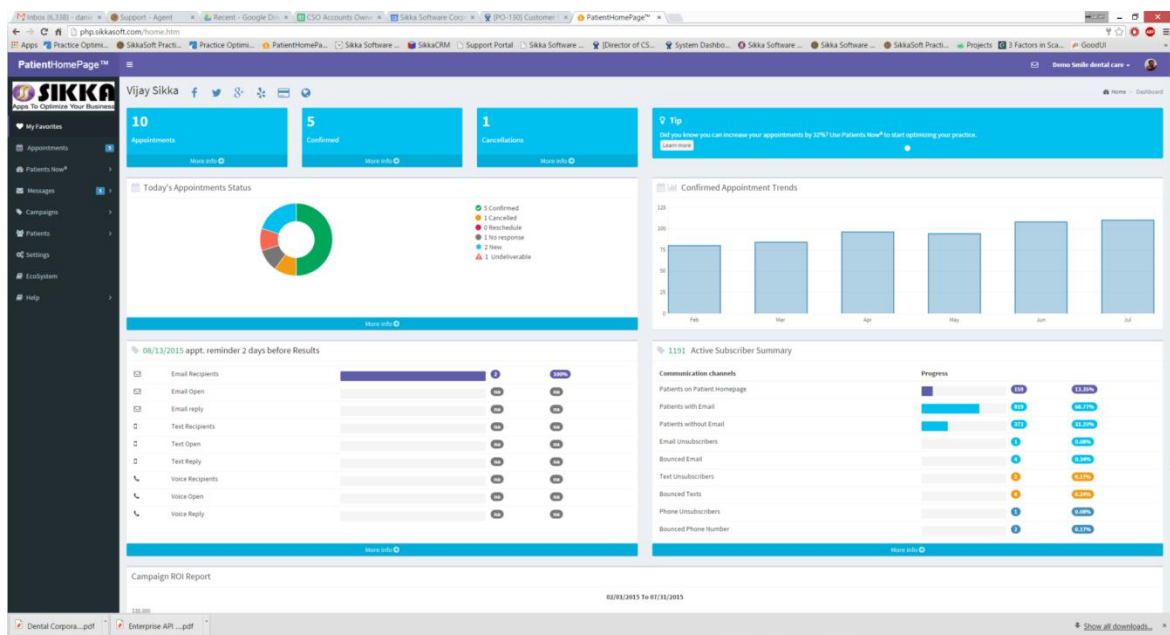
The screenshot shows the 'Sikka Apps Registration Form' with the following fields and sections:

- Header:** Sikka logo, 'App To Optimize Your Business', phone number '800-94-SIKKA', and a 'REQUEST A DEMO' button.
- Navigation:** Home, Apps, Ecosystem, Publications, About Us, Contact Us.
- Form Title:** 'Sikka Apps Registration Form' with a note '(* Indicates mandatory fields)'.
- Fields:**
 - Specialty: * (Dropdown menu)
 - First Name: * (Text box)
 - Last Name: * (Text box)
 - Email: * (Text box)
 - Create Password: * (Text box) - **Orange arrow points here.**
 - Create User Name: * (Text box)
 - Confirm Password: * (Text box)
 - Practice Name: * (Text box)
 - Address: * (Text box)
 - City: * (Text box)
 - State: * (Text box)
 - Zip Code: * (Text box)
 - Country: * (Dropdown menu, currently 'United States')
 - Phone: (Text box)
 - Practice Management System (PMS): (Dropdown menu)
 - PMS User Name: (Text box)
 - PMS Password: (Text box)
 - Windows User Name: (Text box)
 - Windows Password: (Text box)
 - Referred By: (Text box)
 - Contact Person: (Text box)
 - Comments: (Text box)
- Footer:** A checkbox for 'I agree with Portal Agreement and HIPAA/ EULA Agreement' and a 'SUBMIT' button - **Orange arrow points here.**

Note: In order to use **Patient HomePage™** you will have to purchase a license and install the Sikka Platform Cloud (SPC) on your server or workstation where your practice management software resides

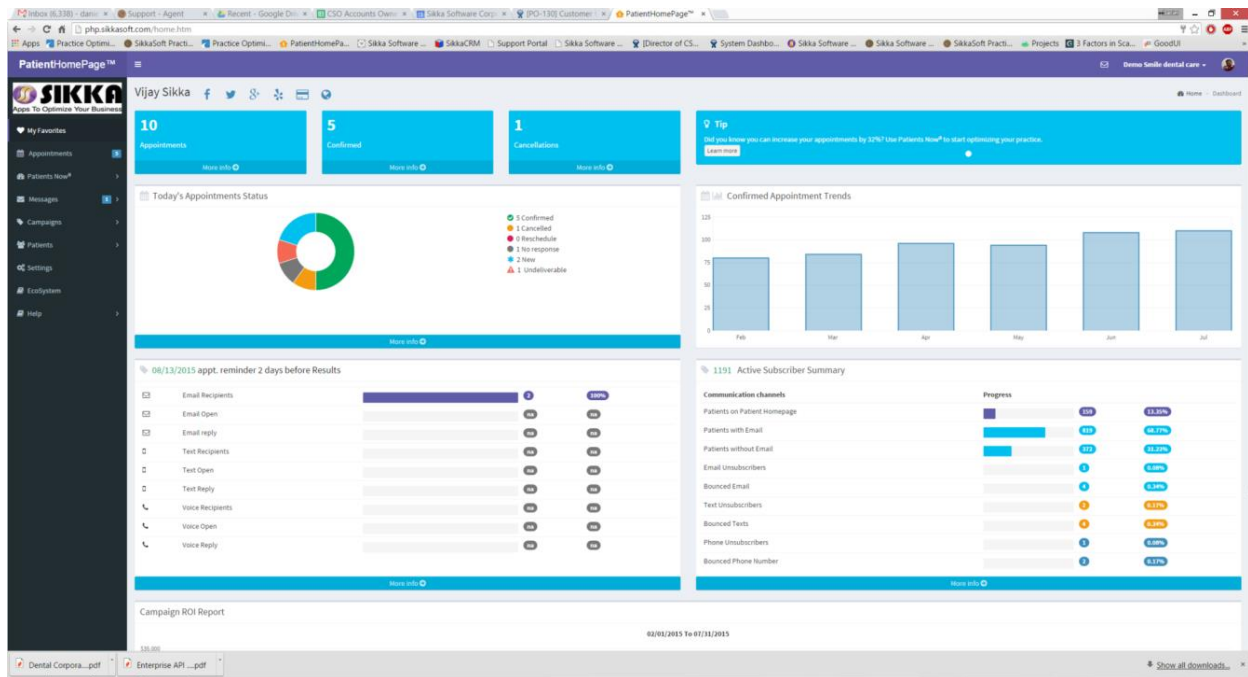
2. Signing In To Patient HomePage™ Provider Account

1. Enter your User ID and Password that you used when creating your account
Note: If you don't remember your User ID and/or Password click on “I forgot my password” or “I forgot my ID” and follow the simple instructions
2. When signing in for the first time, the License Agreement must be accepted by clicking the “Agree” button
3. After accepting the License Agreement you will see the Home Page



3. Navigating the Patient HomePage™ Provider Home Page

1. Upon signing in, you will see the following features on the Home Page:
 - a. Appointments, Confirmed, and Cancellations statistics
 - b. Tips (on how to use **Patient HomePage™**)
 - c. Today's Appointments Status
 - d. Confirmed Appointment Trends
 - e. Campaign statistics
 - f. Active Subscriber Summary
 - g. Campaign ROI Report
 - h. Navigation icon
 - i. Navigation menu
 - j. Inbox icon
 - k. Practice Selection
 - l. Account icon
 - m. Social networking, online payment, and website links

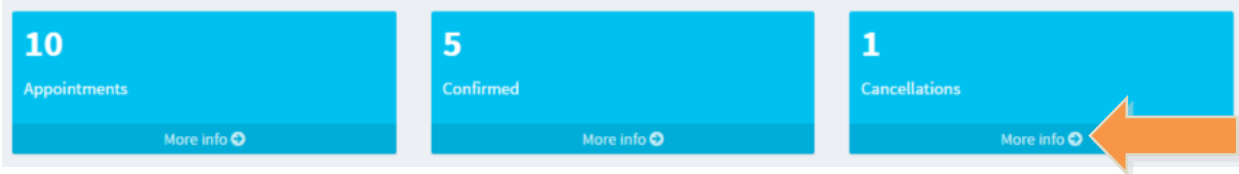


A. Appointments, Confirmations, and Cancellations

1. These blue boxes show the counts for Appointments, Confirmed appointments, and appointment Cancellations for the current day

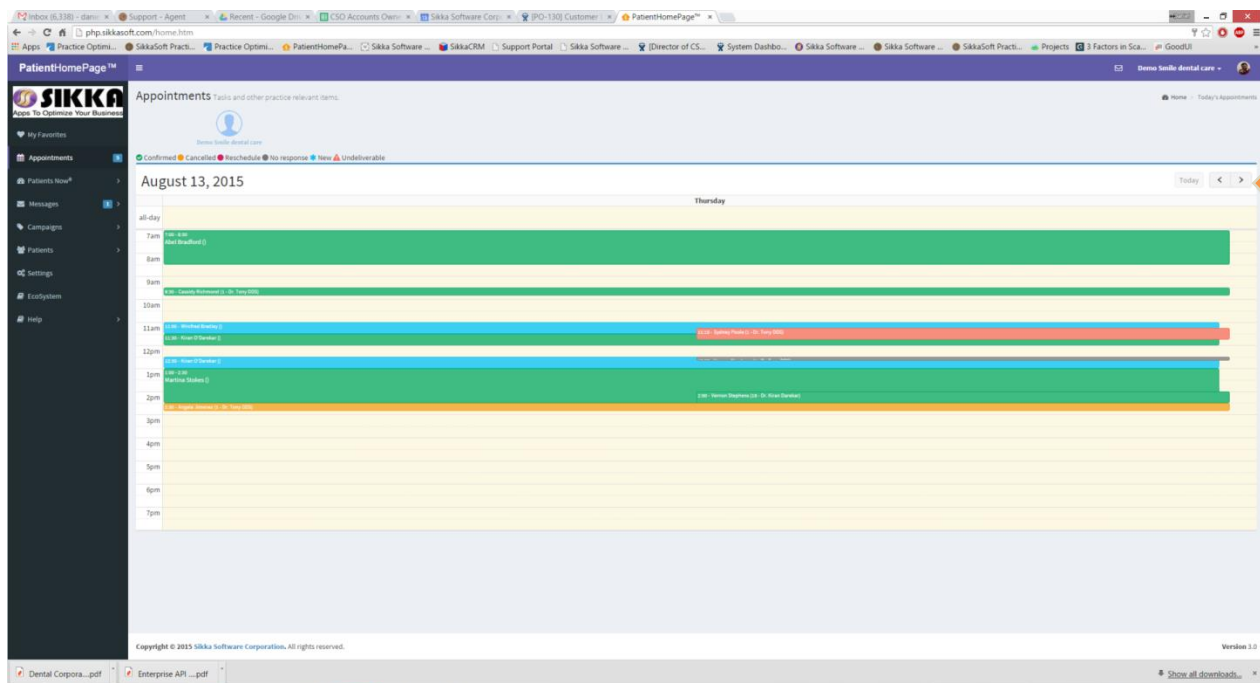
Note: These values are based on the last data refresh of your practice management software

2. To see the detail data for each of the numbers, click on the “More info” link at the bottom of the box



3. This will open the Appointments screen, showing you the appointment blocks for that day
 - a. The colorized blocks signify status alerts for Confirmed, Cancelled, Reschedule, No Response, New, and Undeliverable

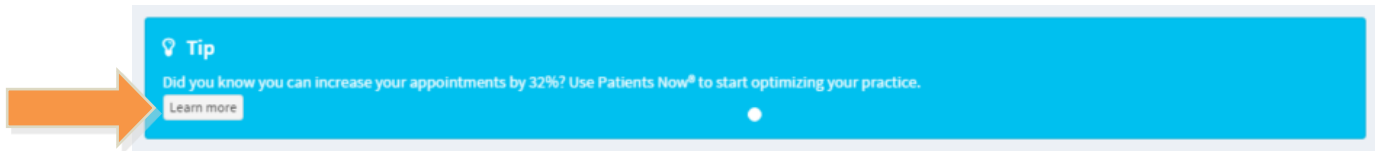
Note: These statuses are based on the responses to your appointment reminder campaigns



4. You may search for Appointments on other days in the week by using the left/right toggle arrows in the upper right

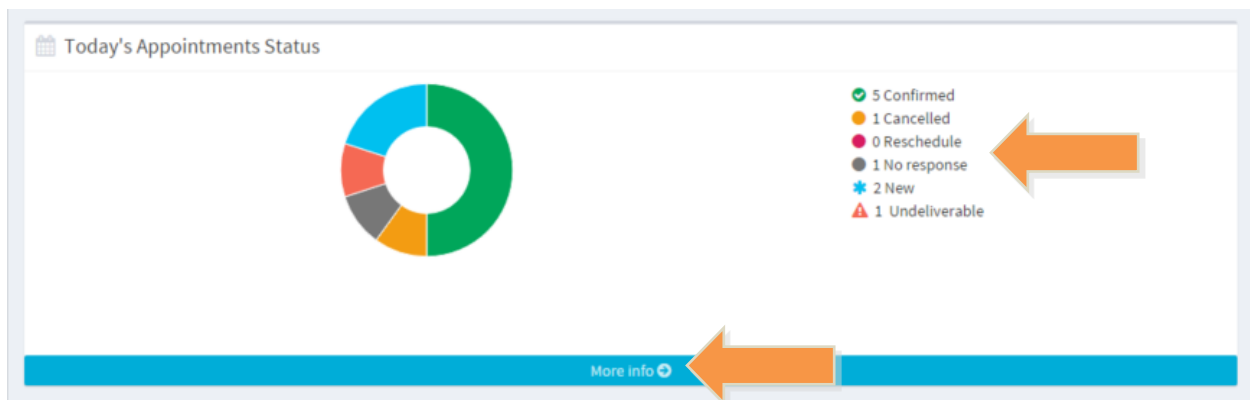
B. Tips

1. **Patient HomePage™** will provide you with tips to get the most out of your experience using the program
2. Clicking on the “Learn More” button in the Tips box will take you to directly to the feature the tip is recommending



C. Today's Appointment Status

1. This doughnut graph will show you the percentages of patients in each status for today's appointments

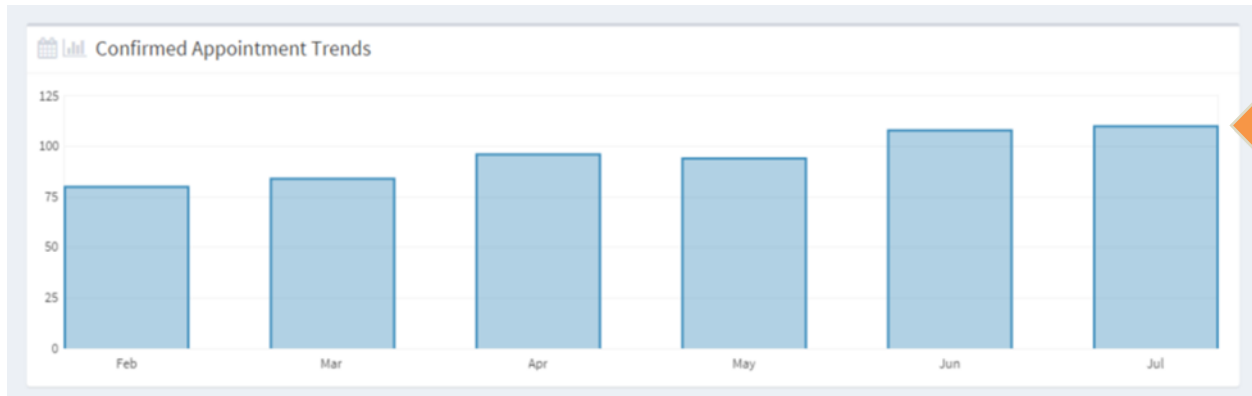


2. To see the detail for the day's Appointments percentages, click on the “More info” link
 - a. This will open the Appointments screen, showing you the appointment blocks for that day, as well as the colorized status alerts for Confirmed, Cancelled, Reschedule, No Response, New, and Undeliverable

Note: These status updates will be based on the correspondence for your appointment reminder campaigns

D. Confirmed Appointment Trends

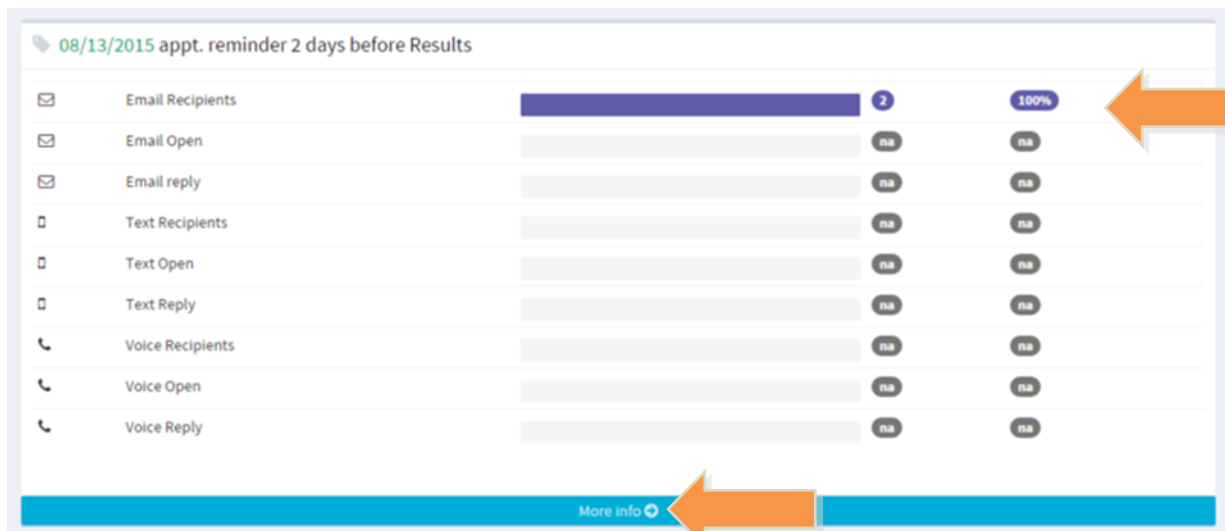
1. This bar graph will show you how many appointments were confirmed over the last 6 months



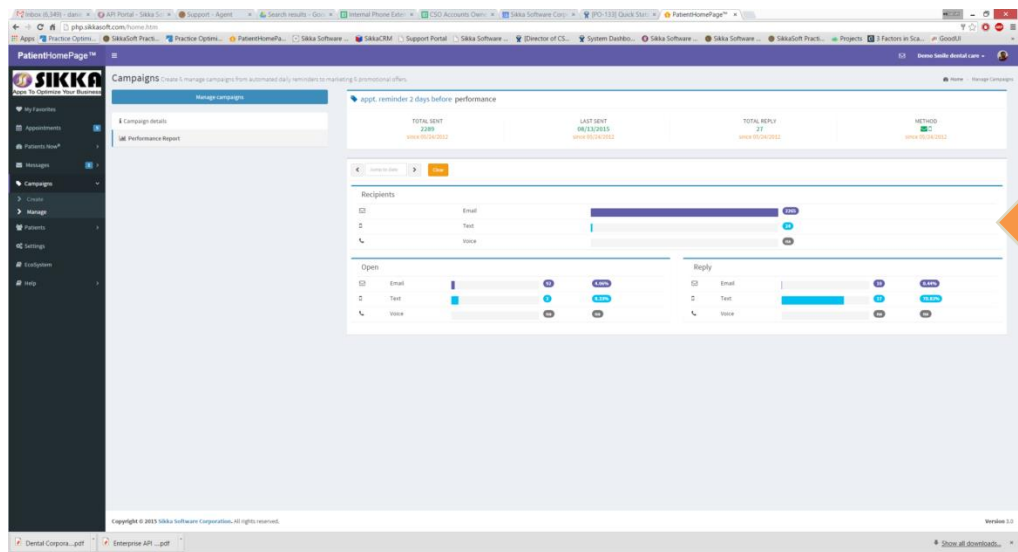
2. Hovering over each bar graph will show you the exact number of confirmations for that particular month

E. Campaign Statistics

1. This report will measure Campaign sending activity for Email, Text, and Phone - counting number of recipients, number of opens, and number of responses

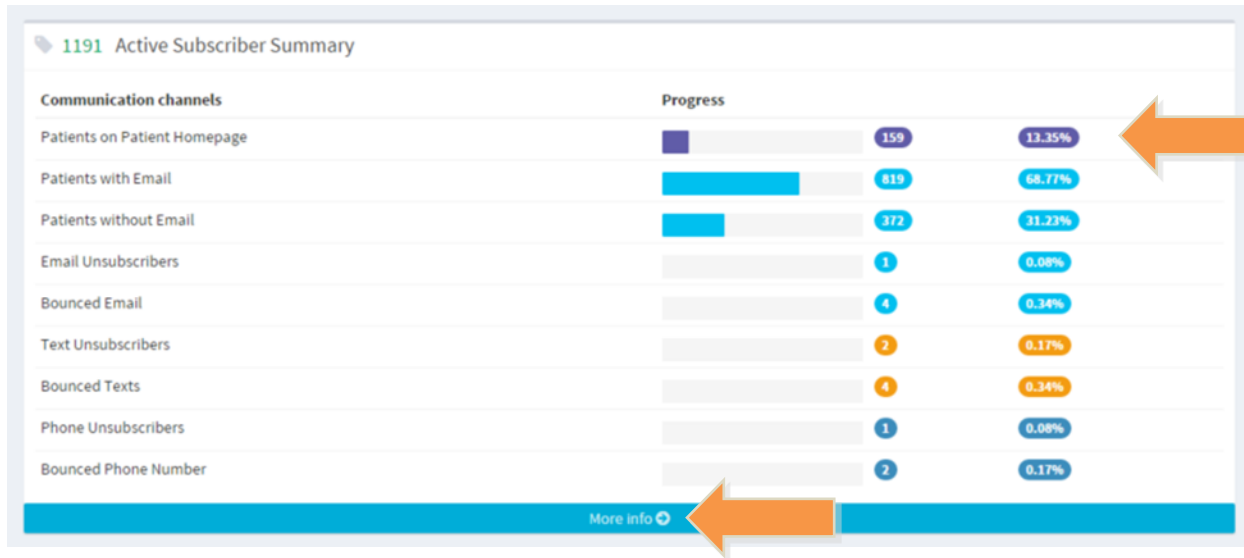


2. It will show you the actual number, and the percentage of patients who have received, opened, or replied to your campaigns
3. To see the detail for the Campaign statistics, click on the “More info” link near the bottom of the window
4. This will open the Campaigns screen, showing you the Performance Report, active campaign performance statistics, and a link to Campaign details



F. Active Subscriber Summary

1. This graphic measures the counts and percentages of how your patients are currently engaging with you via **Patient HomePage™** through the three communication channels (email, text, and voice)



2. You can click on the links under Communication channels to get a list of patients in that category. You can download these lists as PDF, Excel, or CSV

Note: This will be useful data that your practice can use to update the information for these patients in your PMS – making **Patient HomePage™** that much more valuable and effective

Patient ID	First Name	Last Name	Email	Phone	Location
135901	David	York		1-780-238-4728	Val D'Ardenne
240805	Alyssa	Woodward		1-800-250-4038	Schaumburg British Columbia
114501	Mary	Woods		1-702-852-8739	Newport Beach New Brunswick
128701	Pearl	Woodard		1-208-489-0258	Newton NY
40003	Kaden	Woodard		1-640-232-8934	Lima Manitoba
57003	Wayne	Wong		1-395-386-4033	South Pasadena Hawaii

Export to: PDF Excel CSV

Page 1 of 8

1118 Active Subscriber Summary

3. It will also measure your progress in getting your patients actively connected to you using the program
4. To see the detail for the progress, count, and percentages, click on “More info” link
5. This will open the Campaigns screen, showing you the Active campaigns currently running in **Patient HomePage™** with links to each Active campaign, and also a tab to view your Inactive campaigns

Campaigns - view & manage campaigns from automated daily reminders to marketing & promotional offers.

Home > Manage Campaigns

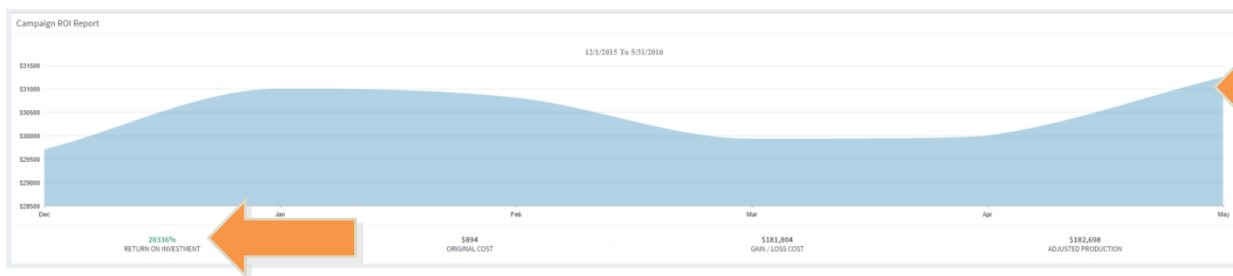
Active Inactive

Program name	Frequency	Method	Type	Start	End	Status
Open reminder / Appointment	Daily	✓	Appointment reminders	05/01/2015	None	Active
Send to insurance	One time	✓	Notify patient(s)	07/11/2015	07/11/2015	Active
Today's birthday patients	Daily	✓	Birthday reminders	05/01/2015	None	Active
Today's patients feedback form	Daily	✓	Today's patients feedback form	05/01/2015	None	Active

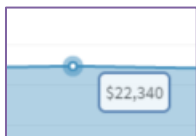
Copyright © 2015 Sikka Software Corporation. All rights reserved. Version 2.0

G. Campaign ROI Report

1. This trend report will measure the key Return On Investment (ROI) dollars over the last 6 months
 - a. This is measured by factoring your original cost against your adjusted production after using the campaigns



2. Hovering over each point will display the actual values

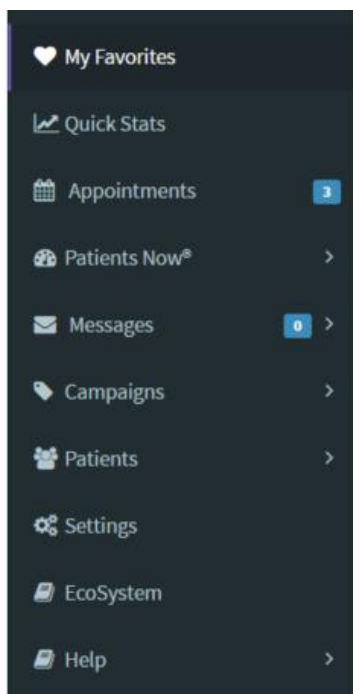


Note: It will only display the totals since you began your **Patient HomePage™** license for Adjusted Production

H. Navigation Menu

1. The navigation menu on the left side is where you will navigate to all the features, modules, and settings within **Patient HomePage™**

Note: For more info on using the navigation menu please go to [Section 4](#)



I. Navigation Icon

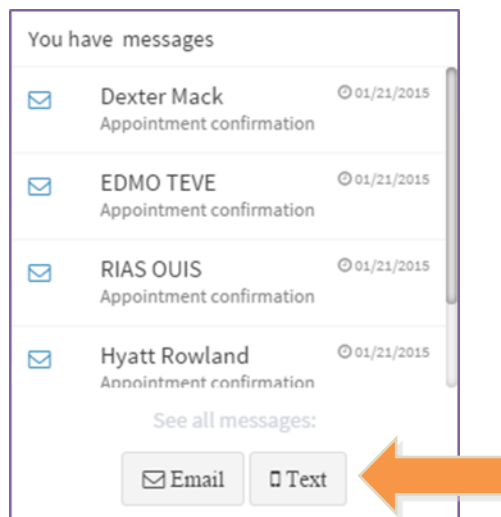


1. Clicking on this icon collapses the navigation menu to the left, giving more screen area for the data/templates screen

J. Inbox Icon

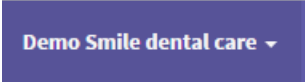


1. Clicking on this icon will display your newest four messages received from patients



2. You will also have buttons to See all messages, and view your email and text inboxes

K. Practice Selection



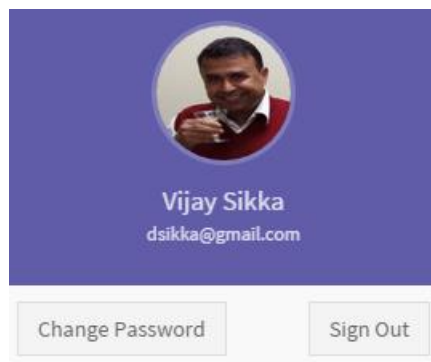
Demo Smile dental care ▾

1. Shows the name of your practice/location that you're currently signed into

L. Account Icon



1. Clicking on this icon will display your name and email address for your user account



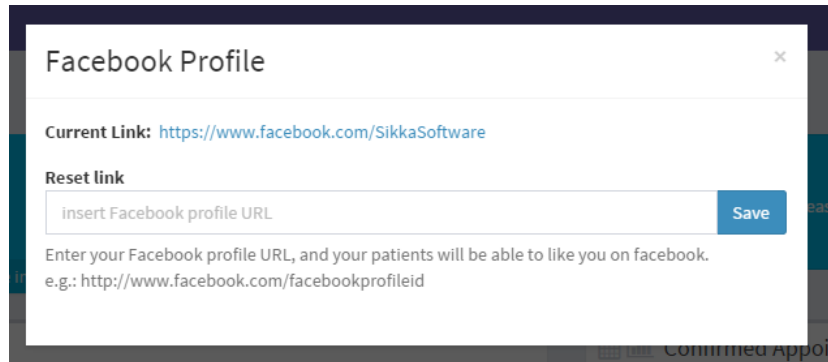
2. Change Password button will allow you to update your password for signing in
3. Sign Out button will sign you out of your **Patient HomePage™** account

Note: You will automatically be signed out of your account after 30 minutes of inactivity (for security purposes)

M. Social networking, online payment, and website links



1. Facebook link will be for your practice's Facebook page



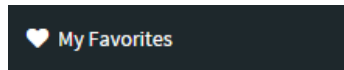
2. Twitter link will be for your practice's Twitter page
3. Google Plus link will be for your practice's Google Plus page
4. Yelp link will be for your practice's Yelp Reviews page
5. Credit Card link will allow you to set up an online payment link, giving your patients the ability to make payments to you via their **Patient HomePage™** patient account

Note: You must have an online payment account (i.e. Pay Pal, or a website with a payment link (i.e. Authorize.net) set up in order to use this feature. Payments will not automatically be posted in your practice management software

6. Google Reviews link will be for your practice's Google Reviews page
7. Website will be for your practice's website

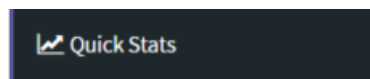
4. Using The Patient HomePage™ Navigation Menu Elements

a. My Favorites

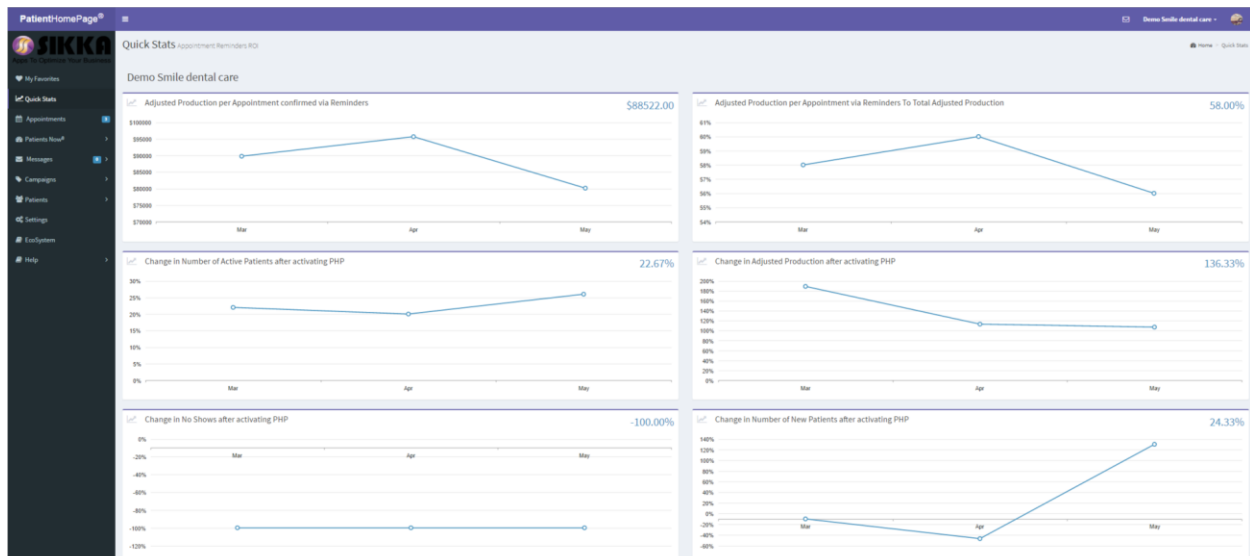


- i. Basically the “Home” screen

b. Quick Stats



- i. Quick Stats is a page that displays how **Patient HomePage™** is working for you over the last 3 months. It rates progress in 6 key performance indicators to show how valuable the App is for your practice.
- ii. Measures: Increase in Adjusted Production, Decrease in No Shows, Increase in New Patients, Increase in Patient Retention (Active Patients)

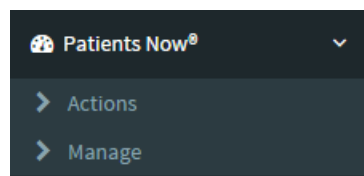


c. Appointments



- i. Indicator showing how many appointments are listed for today for quick reference
- ii. Clicking will open the Appointments screen, showing you the appointment blocks for that day, as well as the colorized status alerts for Confirmed, Cancelled, Reschedule, No Response, New, and Undeliverable
Note: These status updates will be based on the correspondence for your appointment reminder campaigns
- iii. You may search the Appointments for other days by using the toggle arrows in the upper right
- iv. Clicking the Today button will take you back to today's appointments page

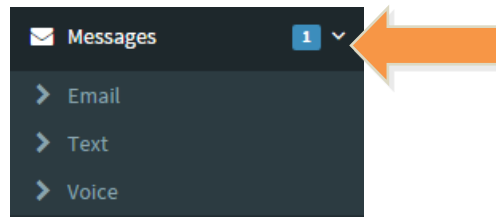
d. Patients Now®



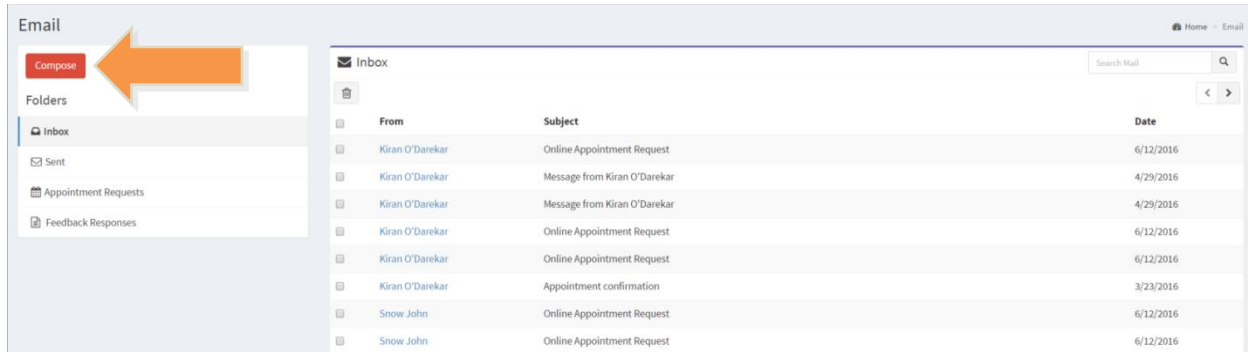
- i. This scheduling assist “app within the app” is a powerful tool that will identify your high potential revenue opportunities, and instantly find patients to fill holes in your schedule
 - i. Actions selection will open a menu of patient list categories; giving you the most eligible patients to fill those holes in your schedule, and instant opportunities to increase your revenue
 - ii. Manage selection will open a screen enabling you to view your active and inactive Patients Now® campaigns, and view some key stats about each campaign

Note: To find out more about Patients Now® right now go to [Section 5](#)

e. Messages



- i. The blue indicator will display how many messages are currently new/unread in your inboxes
- ii. Email selection will open your inbox, having tabs for both received and sent messages from and to patients via **Patient HomePage™**, as well as tabs for appointment requests (from patients) and feedback responses (from patients)



- i. There is a “Send Text” button as well that will allow you to send a text message directly to just one of your patients. It will allow you to select a patient via a search and a few dynamic elements to put into your 170 character text message.

Send Text

To:

Type to search patient first name, last name, or cell fields, and press enter

First Name	Last Name	Cell	
ARTI		000-000-1001	+
CADE		000-000-1001	+
RELL		000-000-1001	+
OBUH		000-000-1001	+

Drag dynamic elements below: +

FirstName

PracticeName

PracticePhoneNumber

Text-to-Message Template

170 characters remaining

Plain text only. Text messages do not support HTML codes. Keep character count within 170 characters.

Send

- iv. Voice selection opens your inbox, having tabs for both received and sent messages from and to patients via **Patient HomePage™** campaigns

Automated voice messages

Home > Automated voice messages

Folders

Inbox

Sent

Inbox

Search Voice

From

Message

Date

Laurel Nichols

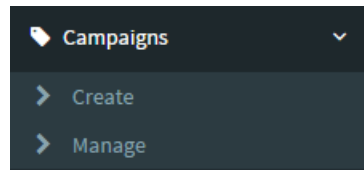
Laurel Nichols replied of appointment reminder

08/19/2015

© Sikka Software Corporation 2015. All rights reserved. | Patient HomePage™ User Guide

21

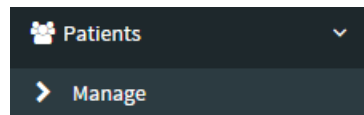
f. Campaigns



- i. Create selection opens the Create a campaign self-guided wizard to get you started using your **Patient HomePage™** account
- ii. Manage selection will open a screen enabling you to view your active and inactive campaigns, and view some key stats about each campaign

Note: To find out more about Campaigns right now go to [Section 6](#)

g. Patients



- i. Manage selection will open the Patients screen allowing you to search for patients, manage patient info, and generate patient reports using filters

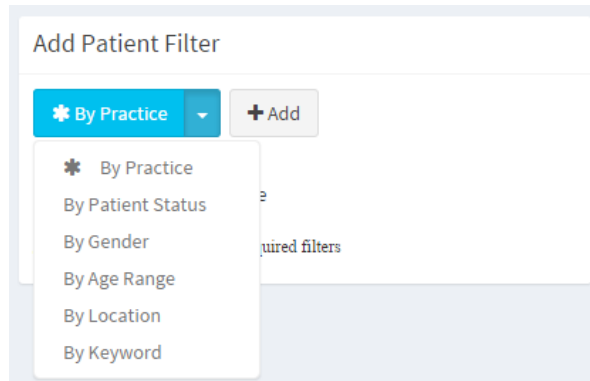
Patients Search, manage, and generate patient reports. Home Manage Patients

Add Patient Filter By Patient + Add

☒ Demo Smile dental care
 Filters marked with are assigned filters

Patient ID	First name	Last name	Email	Phone	Status	Location	Gender
120501	Sindhu	Achar				Abilene, Quebec	Female
274502	Hedwig	Acosta				Old City, Northwest Territories	Female
387502	Phoebe	Adams			Active	Augusta, Quebec	Female
408502	Sindhu	Achar			Active	Ashland, NB	Female
421003	ORPU	AIDE			Active	Chino, Ontario	Male
430001	Amal	Accevedo			Active	Christiansted, Michigan	Male
470001	ANN	AL			Active	Chino, Ontario	Male
486335	RTA	AILE			Active	Chino, Ontario	Female
488201	ARGA	ACQU			Active	Chino, Ontario	Female
488401	UBER	ACK			Active	Chino, Ontario	Male
490501	OPEZ	ADIR			Active	Chino, Ontario	Female
490505	OPEZ	ACOB			Active	Chino, Ontario	Male
507702	RUDE	ACOB			Active	Chino, Ontario	Male

- i. You can filter the patient view by: Practice, Patient Status, Gender, Age Range, Location, and Keyword (patient name)



- ii. You can review which patients have an email and cell phone, and which patients don't (green=have, red=have not). This will help in making **Patient HomePage™** more effective, and your PMS having better data.

- iii. The patient view will display the results after filtering

1118 Patients

X Demo Smile dental care

Patient ID	First name	Last name	Email	Phone	Status	Location	Gender
126501	Sindhu	Achar	✖	☐	Active	Abilene, Quebec	Female
276502	Hedwig	Acosta	✔	☐	Active	Oil City, Northwest Territories	Female
397502	Phoebe	Adams	✖	☐	Active	Augusta, Quebec	Female
406501	Sindhu	Achar	✖	☐	Active	Ashland, NB	Female
421003	ORPU	AIDE	✔	☐	Active	Chino, Ontario	Male
438001	Amal	Acevedo	✔	☐	Active	Christiansted, Michigan	Male
478801	ANN	AL	✔	☐	Active	Chino, Ontario	Male
486103	RTA	AILE	✔	☐	Active	Chino, Ontario	Female
488201	ARGA	ACQU	✔	☐	Active	Chino, Ontario	Female
488401	UBER	ACK	✔	☐	Active	Chino, Ontario	Male
490501	OPEZ	ADIR	✔	☐	Active	Chino, Ontario	Female
490505	OPEZ	ACOB	✔	☐	Active	Chino, Ontario	Male
507702	RUDE	ACOB	✔	☐	Active	Chino, Ontario	Male

- i. It will show the total number of patients in the list
- ii. It will show the active filters (which can be removed by simply clicking on the “X” in the green box)
- iii. It will allow you to sort the results by each heading

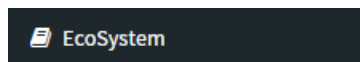
h. Settings



- i. All of the tools you need to set up your **Patient HomePage™** account, add users, manage appointment requests, patient portals, set up automated reports, using widgets, and other features

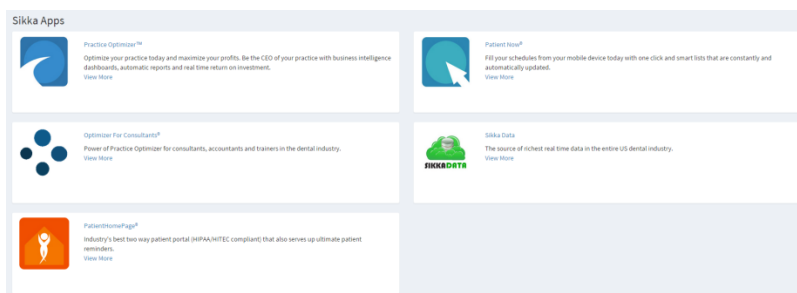
Note: To find out more about Settings right now go to [Section 7](#)

i. Ecosystem

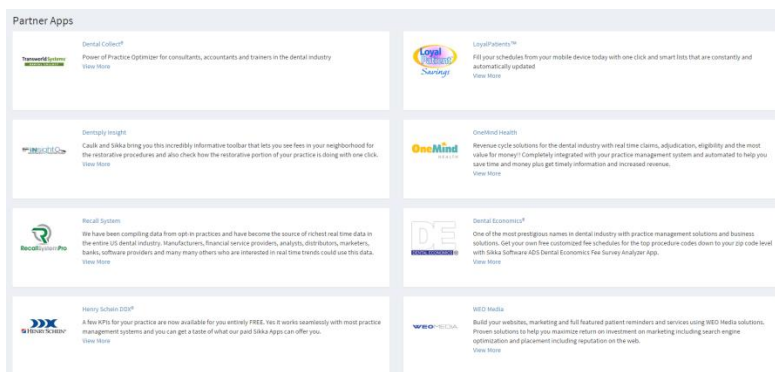


- i. This selection will open a page with info on all of our EcoSystem Apps

- i. Sikka Apps are all of the Apps available from Sikka

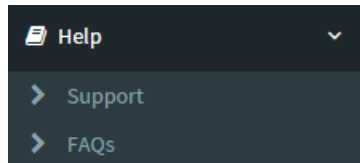


- ii. Partner Apps are all of the apps that were developed or co-developed by Sikka and our partners using our API

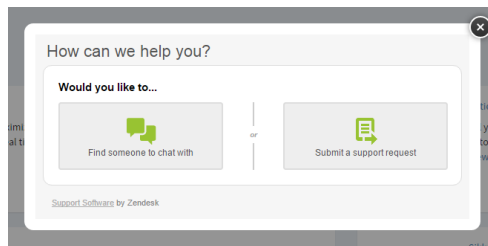


Note: All of these apps run off of the one Sikka Platform Cloud platform (via our API), and integrate with most practice management software

j. Help



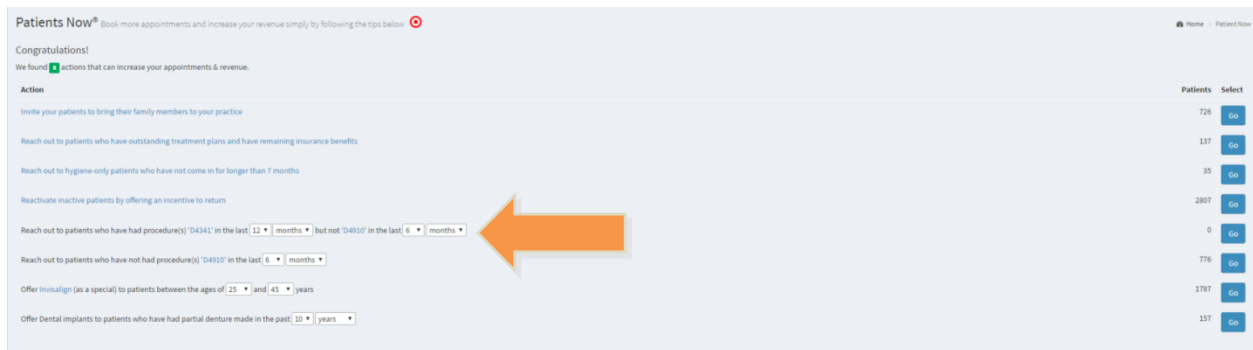
- i. Support selection links to our easy-to-use Zendesk online support system for submitting support tickets, live chat support with actual customer success reps



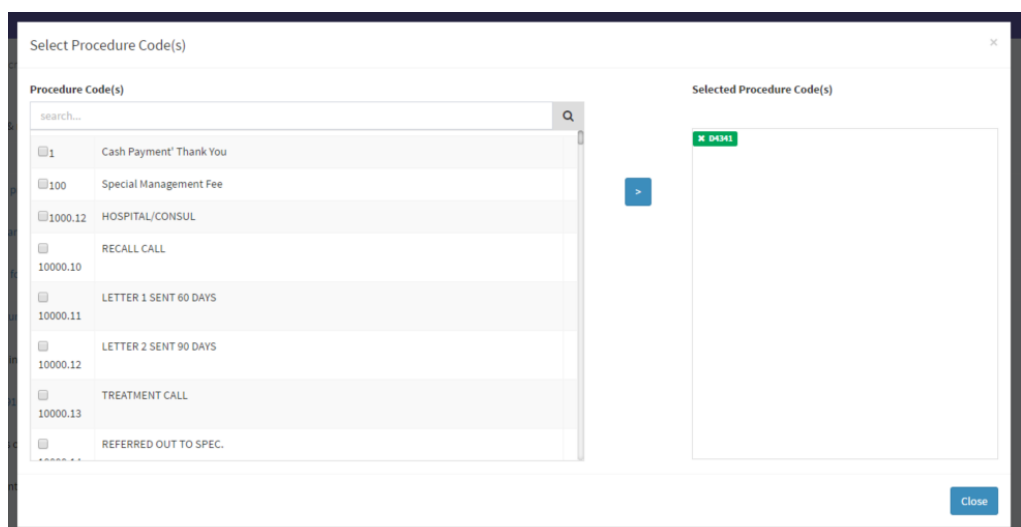
- ii. FAQs selection opens the FAQ page with much of the basic information about **Patient HomePage™**

5. Using Your Patients Now® Scheduling App

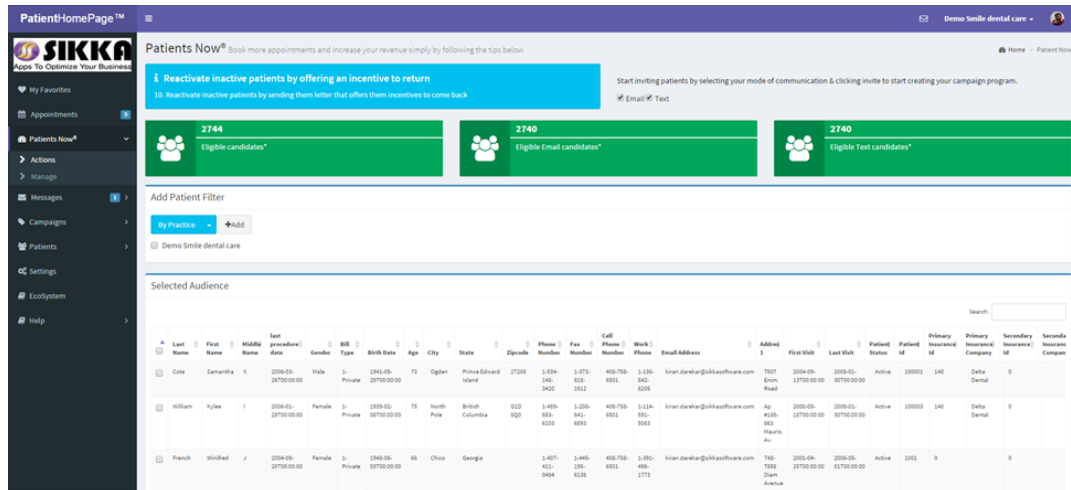
- a. Actions will show you a menu of patient list categories; giving you the most eligible patients to fill those holes in your schedule, and instant opportunities to increase your revenue
 - i. Currently it will show you 8 patient list categories, and how many patients in your practice management software meet the criteria on the right



- i. You can also create your own patient list categories! Four of the patient list categories are editable – you can select a procedure code(s) from your PMS, and/or select the number of months or age demographics



- ii. Clicking on one of these patient list categories will open the Patients Now® campaign screen



- i. The Patients Now® campaign screen will display the patient list category you have selected in the blue box

Reactivate inactive patients by offering an incentive to return

10. Reactivate inactive patients by sending them letter that offers them incentives to come back

- ii. You can choose how your communication will be sent to your patients: email and/or text

Start inviting patients by selecting your mode of communication & clicking invite to start creating your campaign program.

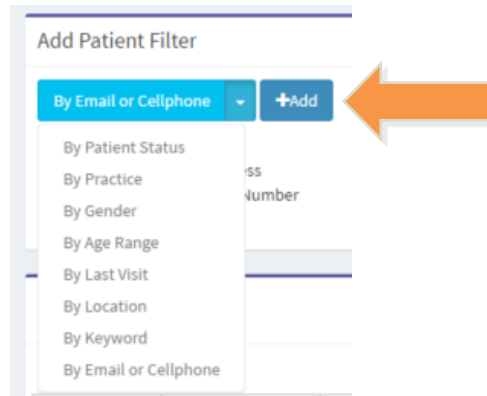
☒ Email ☒ Text

- iii. The green boxes will show you key statistics on total Eligible candidates (patients), Eligible email candidates (patients with an email address in your practice management software), Eligible text candidates (patients with a mobile phone number in your practice management software)

	2744 Eligible candidates*
	2740 Eligible Email candidates*
	2740 Eligible Text candidates*

Note: Lists of eligible candidates are valid as of the current today and may change over time based on selection criteria.

- iv. Add Patient Filter allows you to add more patient filters to your selected patient list category based on: Patient Status, Practice, Gender, Age Range, Last Visit, Location, Keyword and Email or Cellphone



- v. Selected Audience will display the actual patient info at the bottom of the Patients Now® screen

Selected Audience

[Export](#) [Invite](#) [Cancel](#)

☒ Select All ☐ Select

	Last Name	First Name	Middle Name	Gender	Bill Type	Date of Birth	Age	City	State	Zipcode	Phone Num...	Fax Number	Cell Phone N...	Work Phone	Email Address	Address
<input type="checkbox"/>	Barrera	Maite	W	Male	1-Private	11/11/1950	64	Gloucester	Ontario	57148	1-434-660-5337	1-328-227-8092	000-000-1001	1-980-434-0253	kiran.darekar...	Ap #911 Cras St
<input type="checkbox"/>	Frank	Lila	R	Male	1-Private	3/4/1943	71	San Dimas	VT	Y4H 909	1-831-597-1226	1-891-221-5507	000-000-1001	1-196-604-6823	kiran.darekar...	8318 Ar
<input type="checkbox"/>	Murphy	Whoopi	Y	Female	1-Private	9/11/1950	64	Portsmouth	GA	16880	1-951-840-7334	1-116-365-4432	000-000-1001	1-303-795-1968	kiran.darekar...	419 Lig
<input type="checkbox"/>	Slater	Courtney	C	Female	1-Private	12/6/1955	59	Kalamazoo	Manitoba	N7B 3E7	1-128-288-4259	1-163-598-1923	000-000-1001	1-429-610-2944	kiran.darekar...	P.O. Bo 7596 F Avenue
<input type="checkbox"/>	Reid	Eagan	M	Male	1-Private	11/11/1950	64	Duncan	Virginia	50N 1J4	1-284-654-4834	1-696-213-0644	000-000-1001	1-458-273-1567	kiran.darekar...	Ap #34 Vitae S

Page 1 of 15

1 - 50 of 702 items

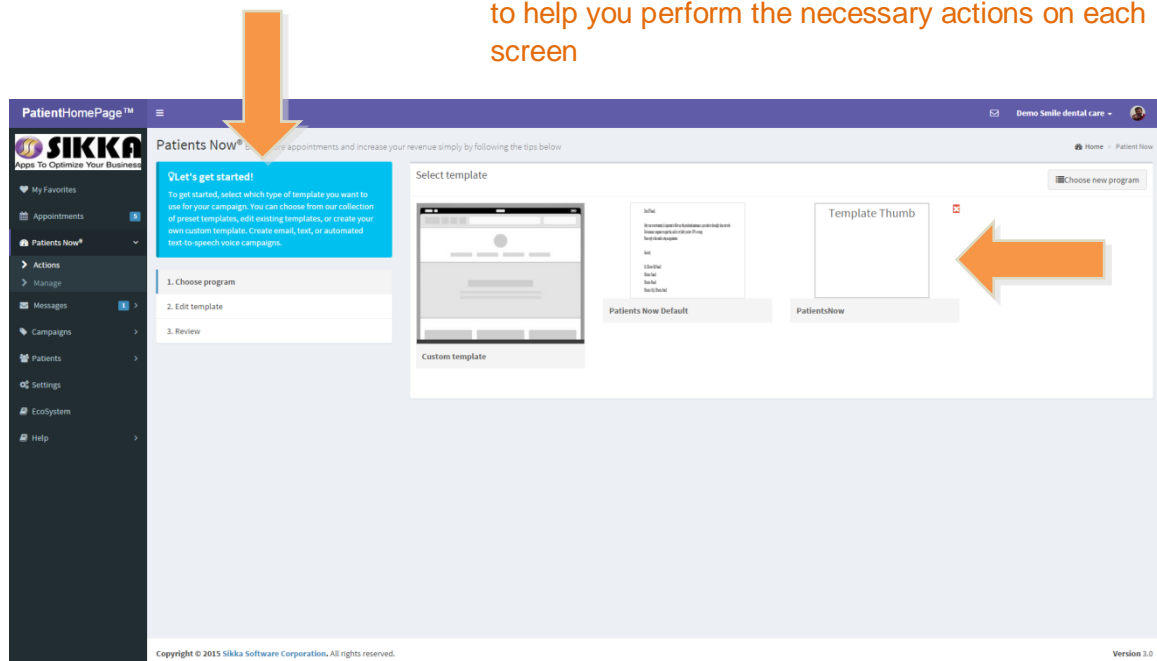
[Export](#) [Invite](#) [Cancel](#)

▲ List of eligible candidates is valid as of today & may change over time based on selection criteria. Clicking invite will take you to the campaign section. You may track the performance of this campaign by going to Patients Now® > Performance reports.

- i. You can select ALL patients in the Selected Audience screen by clicking the check box in the header, or you can select individual patients by selecting the box (or boxes) in each row
- ii. You can sort the results by clicking on the heading for each column you want to sort by

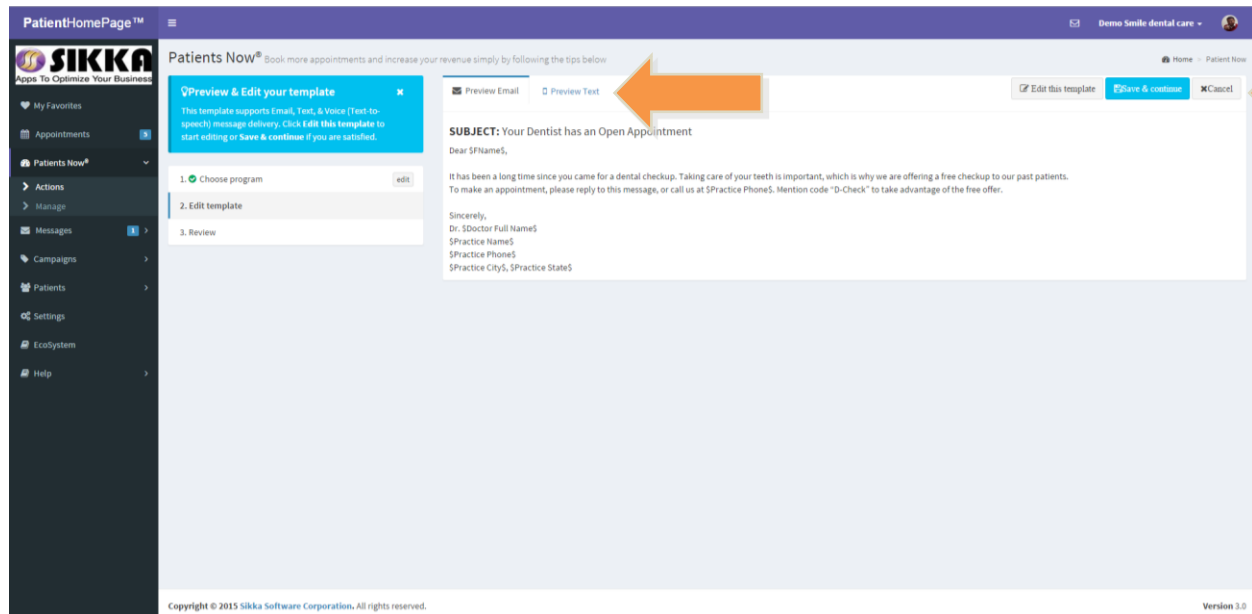
- iii. You can page through all of the patients details in the Selected Audience screen by clicking the Next and Previous buttons in the lower right
- iv. You can export the entire Selected Audience patient details report as an .csv by clicking on the blue Export button near the top/bottom right
- v. Clicking the Cancel button will take you back to the Action screen with the menu of patient list categories
- vi. Clicking on the Invite button will take you to the Patients Now® template wizard
 - a. First step will be for you to click on a template from the Select template window

Note: The blue box in the upper left will display tips to help you perform the necessary actions on each screen

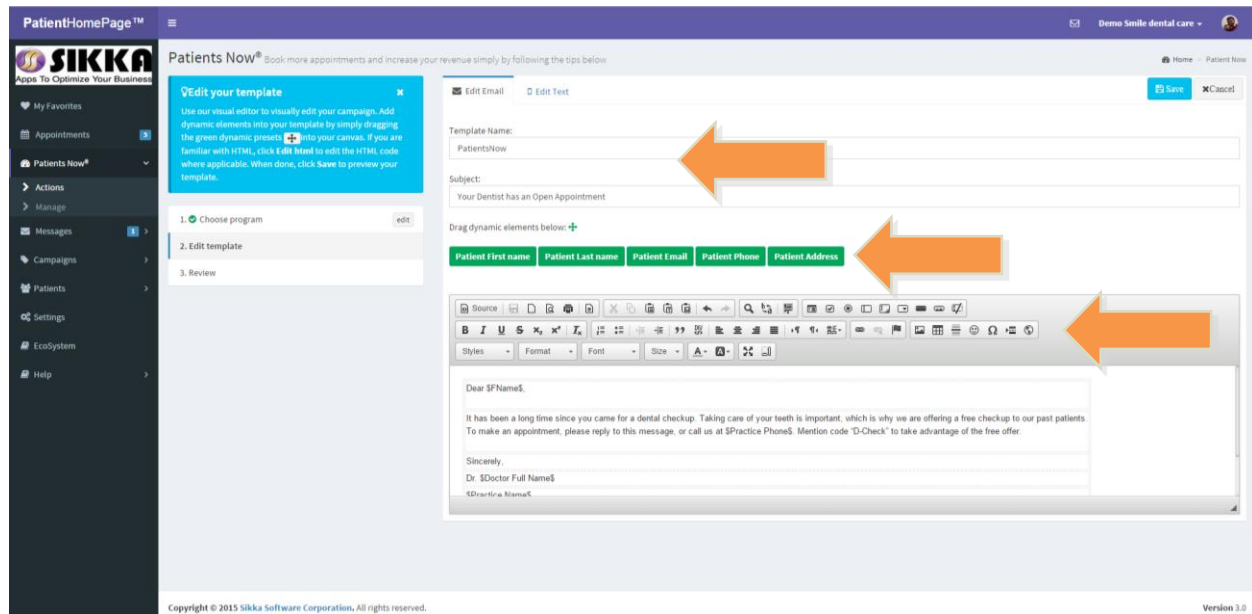


- b. Second step will be for you to edit the template for both the email and the text message

Note: You do not have to edit the template if you are satisfied with the template you've selected



1. Preview Email tab will allow you to read the email that your patients will be receiving
Note: Wherever you read \$...\$ in the body, that field will be replaced by actual data from your practice management software
2. Preview Text will allow you to read the text message that your patients will be receiving
Note: Wherever you read \$...\$ in the body, that field will be replaced by actual data from your practice management software
3. Edit this template will take you to the Patients Now® Edit Email / Edit Text screen



- Template Name is where you can enter the name of your template
- Subject is where you can enter the subject line of the email that your patients will be receiving
- The green dynamic elements you can drag and drop into the body of your email/text, which will automatically display that particular patient info from your practice management software
- You can edit any of the body of your email by using the editor tool bar
- Cancel button will take you back to the Edit template screen (Second Step)
- Save button will take you back to the Patients Now® Edit Email / Edit Text screen (Second Step)

4. Save & Continue button will open a window asking you to enter the Program name

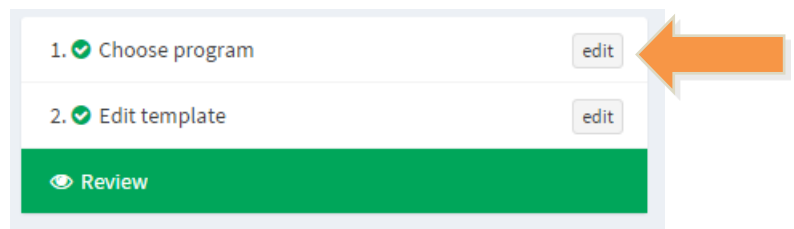
- a. Once entering the Program name, clicking Done will take you to Review Screen (Third Step)
- c. Third Step will be to review all the elements of your email/text program before sending the email/text

Program name	Frequency	Method	Type	Start	End
PN Test	One Time		Patients Now	8/18/2015	n/a

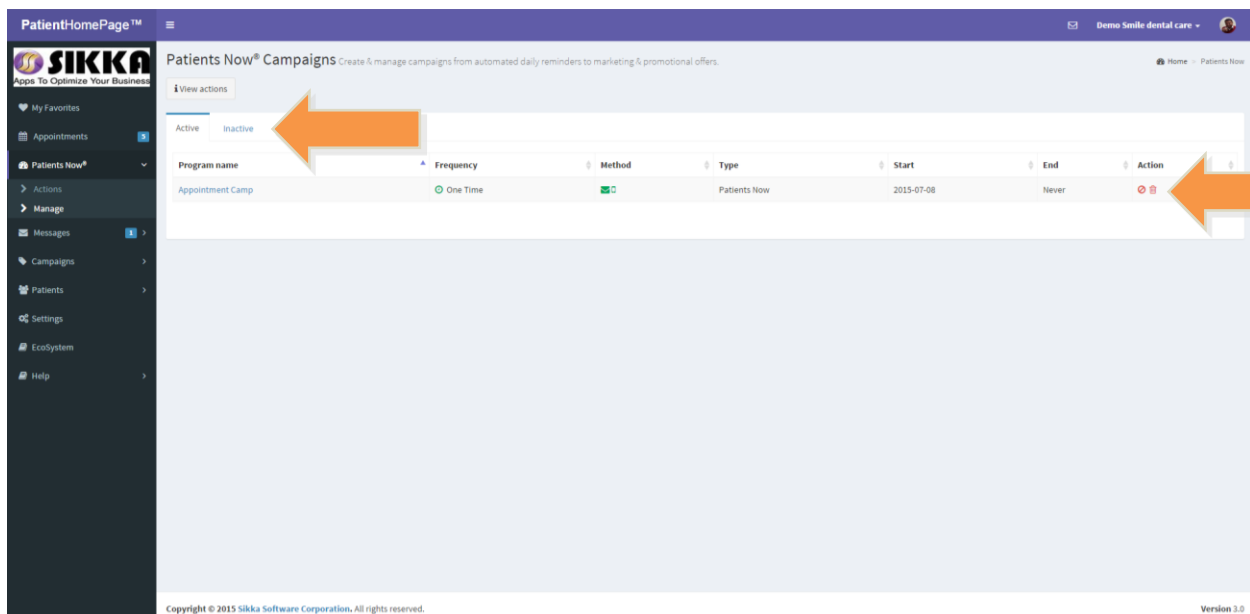
Last Name	First Name	Middle Name	Last procedure date	Gender	Bill Type	Birth Date	Age	City	State	Zipcode	Phone Number	Fax Number	Cell Phone Number	Work Phone	Email Address	Address 1	First Visit	Last Visit	Patient Status	Pat ID
Abbott	Oren	O	11/23/2002 12:00:00 AM	Male	1- Private	8/23/1974	40	Taunton	MD		1-959-457-5997		1-263-960-9231	408-758-6501	1-496-331-2498				kiran.darekar@sikkasoftw	
Abbott	Lee	Q	11/11/2001 12:00:00 AM	Female	1- Private	4/18/1978	36	Seal Beach	Ontario		7813	4088339386	1-601-630-6098	408-758-6501	1-864-980-2630				kiran.darekar@sikkasoftw	
Abbott	Vanna	R	6/13/2011 12:00:00 AM	Female	1- Private	3/18/2006	8	Ketchikan	ID		60083	1-361-657-8410	1-222-587-0889	408-758-6501	1-514-347-7951				kiran.darekar@sikkasoftw	
Acevedo	Clayton	J	9/18/2006 12:00:00 AM	Female	1- Private	12/6/1942	72	West Bend	New Brunswick			1-383-554-4929	1-778-822-5912	408-758-6501	1-207-669-5483				kiran.darekar@sikkasoftw	
Acevedo	Jelani	L	9/27/2005 12:00:00 AM	Female	1- Private	11/22/1973	41	City of Industry	Nevada		N7F 6L6	1-345-612-8972	1-485-590-2276	408-758-6501	1-808-283-8150				kiran.darekar@sikkasoftw	

1. Review Campaign will show the name, frequency, send method, type, start date, and end date (if applicable)
2. You can once again review the patients in your send list

3. You can also preview the email and text content one more time
4. Send Campaign button will send the email and/or texts to the patients on your list
Note: You can click on the Edit button for the items in the wizard menu to go back and update anything you wish



- b. Manage will display a screen enabling you to view your active and inactive Patients Now® campaigns, and view some key stats about each campaign



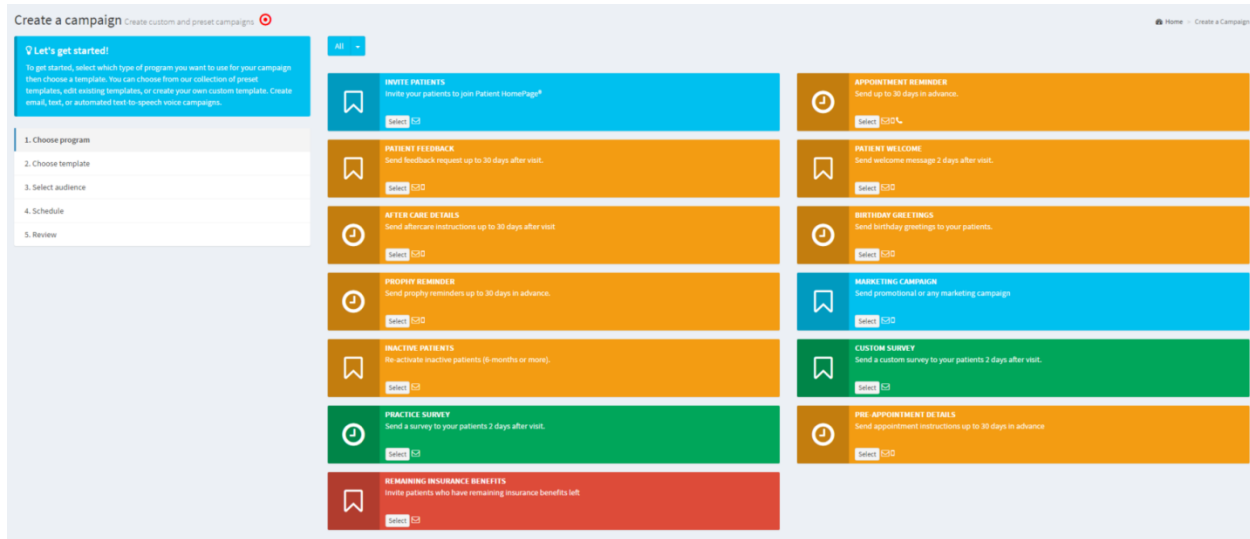
- i. Active tab view will display all of your Patients Now® campaigns
- i. Clicking the red “Don’t” icon will move the campaign to the Inactive tab

- ii. Clicking the garbage can icon will delete the campaign completely
- ii. Inactive tab view will display all of your Patients Now® campaigns
 - i. Clicking the green “start” icon will move the campaign to the Active tab
 - ii. Clicking the garbage can icon will delete the campaign completely
- iii. Clicking the “View Actions” button will take you back to the Actions screen and the patient list categories

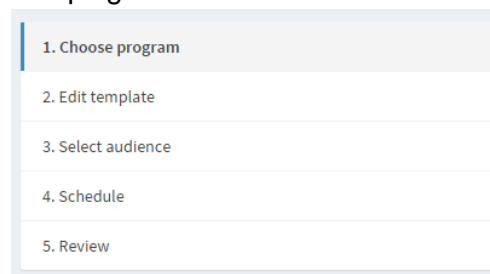
6. Using The Patient HomePage™ Campaigns

Note: You can get to Campaigns by clicking on the Campaigns link in the navigation menu on the left of the screen

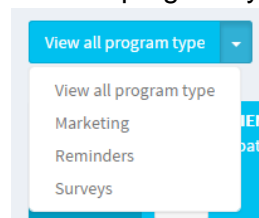
- a. Create selection opens the Create a campaign self-guided wizard to get you started using the most valuable benefit of **Patient HomePage™**



- i. The menu on the left will show you what step you are in the Create a campaign wizard

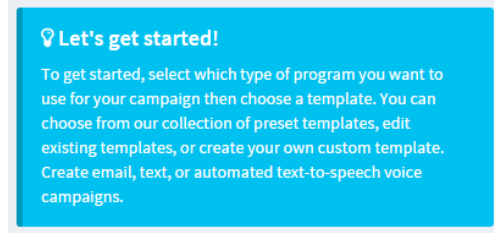


- ii. View all program type will filter the program selection list by type

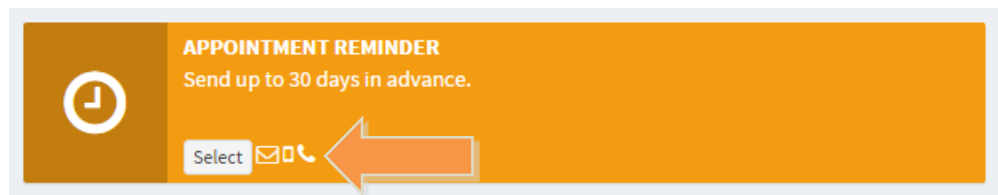


- iii. The program type boxes will display the name of each program, a description, how it can be sent to patients, what type it is, and a button to select it
 - i. Marketing = Blue
 - ii. Reminders = Yellow
 - iii. Surveys = Green

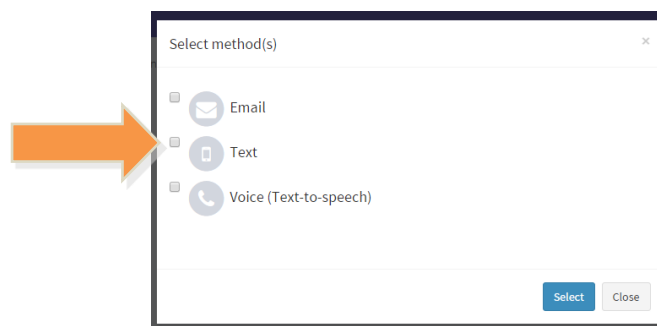
Note: The blue box in the upper left will display tips to help you perform the necessary actions on each screen



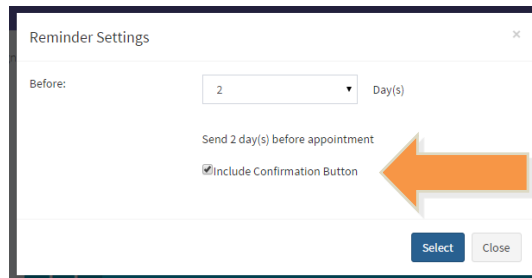
- iv. Step 1: Choose program by clicking the Select button in one of the programs listed on the right side of the page



- i. Clicking the Select button will open a new selection wizard
 - a. The first screen will ask you to choose Email, Text or Voice – then click the Select button to advance



- b. The second screen will ask you to choose how many days before/after the appointment you would like to send the email/text/voice – then click the Select button to advance

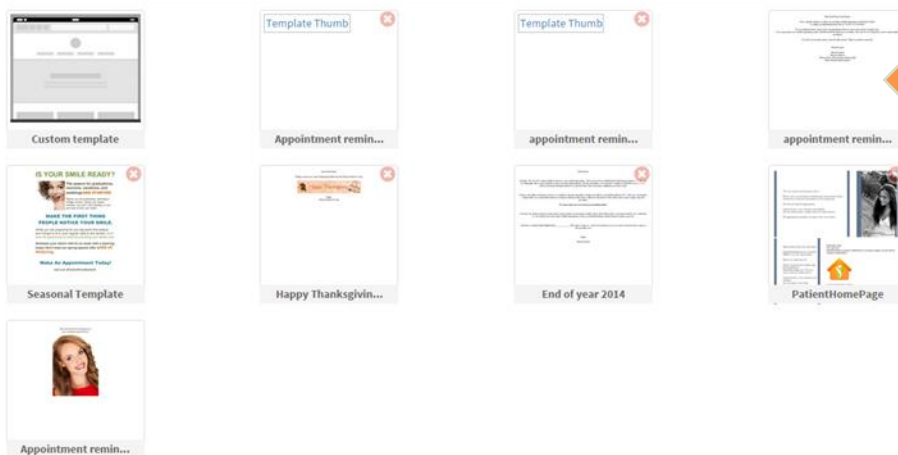


The image shows a 'Reminder Settings' dialog box. It has a 'Before:' label followed by a dropdown menu set to '2' and the text 'Day(s)'. Below this, it says 'Send 2 day(s) before appointment'. There is a checked checkbox labeled 'Include Confirmation Button'. At the bottom right, there are two buttons: 'Select' and 'Close'. A large orange arrow points from the right towards the 'Include Confirmation Button' checkbox.

Note: Some campaign programs will have different options and settings in the screens, so take care in making your selections

- c. The third screen will display the templates you can choose to use and edit for your campaign program

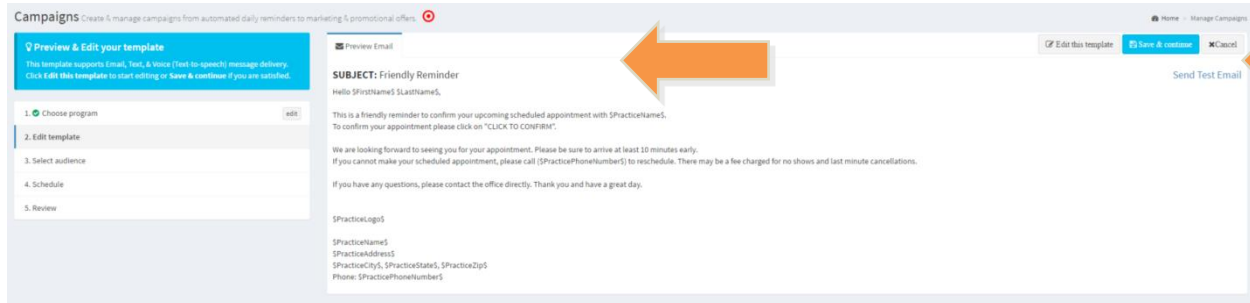
Select template



1. Select one of the templates to begin editing
2. Clicking the Choose new program button will take you back to Step 1

v. Step 2: Edit template

- i. Second step will be for you to edit the template for both the email (and the text message if sending texts)



Note: You do not have to edit the template, if you are satisfied with the template you've selected click **Save & Continue** to proceed

- a. Preview Email tab will allow you to read the email that your patients will be receiving

Note: Wherever you read \$...\$ in the body, that field will be replaced by actual data from your practice management software

- b. Preview Text will allow you to read the text message that your patients will be receiving

Note: Wherever you read \$...\$ in the body, that field will be replaced by actual data from your practice management software

- c. Preview Voice will allow you to read the text message that your patients will be receiving

Note: Wherever you read \$...\$ in the body, that field will be replaced by actual data from your practice management software

- d. You can click on the Send Test Email link anytime to receive an email to the practice Communication Email ID you've set up to review what the patients will see when they receive it.

- e. Edit this template will take you to the Edit Email/Edit Text/Edit Voice screen

Create a campaign Create custom and preset campaigns

Home Create a Campaign

Edit your template

Use our visual editor to visually edit your campaign. Add dynamic elements into your template by simply dragging the green dynamic presets into your canvas. If you are familiar with HTML, click **Edit HTML** to edit the HTML code where applicable. When done, click **Save** to preview your template.

1. Choose program **edit**

2. Edit template

3. Select audience

4. Schedule

5. Review

Edit Email Edit Text Edit Voice **Save** **Cancel**

Template Name: appointment reminders default

Subject: appointment reminders default

Drag dynamic elements below:

FirstName	LastName	MiddleName	Email	Address	City	State	Zip	Gender	Fax	PatientStatus	Phone	WorkPhone	Referredby	AppointmentDate
AppointmentTime	PracticeName	PracticePhoneNumber	PracticeAddress	PracticeCity	PracticeState	PracticeZip	PracticeLogo							

Show Image(s) Library

Source

Styles Format Font Size

Hello \$FirstName\$ \$LastName\$,

This is a friendly reminder to confirm your upcoming scheduled appointment with \$PracticeName\$.

To confirm your appointment please click on "CLICK TO CONFIRM".

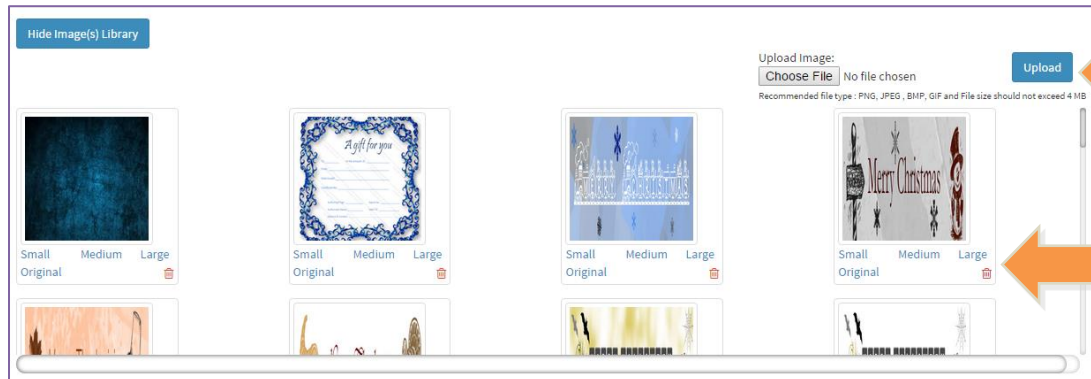
We are looking forward to seeing you for your appointment. Please be sure to arrive at least 10 minutes early.

If you cannot make your scheduled appointment, please call (\$PracticePhoneNumber\$) to reschedule. There may be a fee charged for no shows and last minute cancellations.

If you have any questions, please contact the office directly. Thank you and have a great day.

1. Template Name is where you can enter the name of your template
Note: This name will display on the Select template screen after saving
2. Subject is where you can enter the subject line of the email that your patients will be receiving
3. The green dynamic elements you can drag and drop into the body of your email/text - which will automatically display that particular patient info from your practice management software
Note: The Practice Logo element will come from the logo you've set up in your **Patient HomePage™** account

4. Clicking the Show Image(s) Library button will open image library



- a. You can drag and drop any image from the list into the body
 - b. You can also just click the Small, Medium, Large, and Original links under each image – which will automatically place the image of that size into the body
 - c. You can delete an image from the library by clicking on the trash icon
 - d. You can also Choose File to Upload to the image library from your computer
Note: Image must be formatted as a PNG, JPG, BMP, GIF and must not exceed 4MB file size
 - e. Hide Image Library will collapse the image library, and restore the original Edit template view
5. You can edit any of the body of your email by using the editor tool bar

6. Edit Voice will require you to enter a Caller ID before advancing to the next step

Note: You can only enter digits for the Caller ID, it will not accept dashes or letters

[Edit Email](#)
[Edit Text](#)
[Edit Voice](#)
[Save](#)
[Cancel](#)

Caller ID

5594309063

Drag dynamic elements below: +

[FirstName](#)
[AppointmentDate](#)
[AppointmentTime](#)
[PracticeName](#)
[PracticePhoneNumber](#)

Text-to-Speech Template 7 characters remaining

Dear \$Name\$, This is a reminder that you have an appointment with \$PracticeName\$ on \$AppointmentDate\$ at \$AppointmentTime\$ and We look forward to seeing you then.

Plain text only. Voice text-to-speech messages do not support HTML codes. Keep character count within 170 characters.

[Test Voice Call](#)

7. Test Voice Call will call the phone number you enter, so you can hear how the reminder will sound to your patients
8. Cancel button will take you back to Step 2: Edit template
9. Save button will take you back to the Edit Email/Edit Text/Edit Voice screen

Note: Once everything has been edited to your satisfaction you can advance to Step 3: Select an audience in the campaign wizard

Create a campaign Create custom and preset campaigns

[Preview & Edit your template](#)
[Preview Email](#)
[Preview Text](#)
[Preview Voice](#)
[Edit this template](#)
[Save & continue](#)

1. Choose program [edit](#)
 2. Edit template
 3. Select audience
 4. Schedule
 5. Review

SUBJECT: appointment reminders default

Hello \$FirstName\$ \$LastName\$,

This is a friendly reminder to confirm your upcoming scheduled appointment with \$PracticeName\$.

To confirm your appointment please click on "CLICK TO CONFIRM".

We are looking forward to seeing you for your appointment. Please be sure to arrive at least 10 minutes early.

If you cannot make your scheduled appointment, please call (\$PracticePhoneNumber\$) to reschedule. There may be a fee charged for no shows and last minute cancellations.

If you have any questions, please contact the office directly. Thank you and have a great day.

\$PracticeLogo\$

\$PracticeName\$

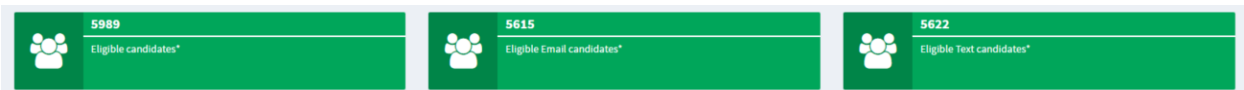
\$PracticeAddress\$

\$PracticeCity\$, \$PracticeState\$, \$PracticeZip\$

Phone: \$PracticePhoneNumber\$

vi. Step 3: Select audience

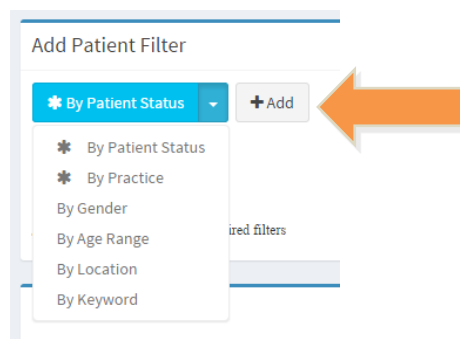
- i. The three info graphics will inform you how many total patients would receive your campaign, and how many patients will receive both email and/or text



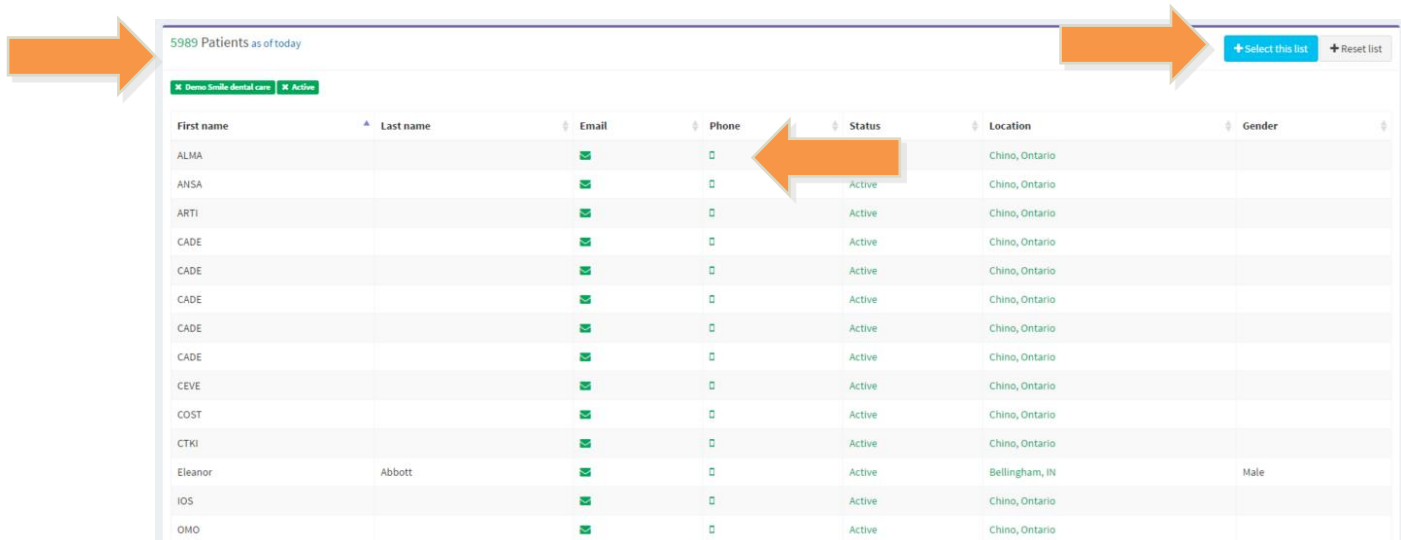
- ii. Add Patient Filter allows you to add more patient filters to your selected patient list category based on: Patient Status, Practice, Gender, Age Range, Location, and Keyword

Note: It's required that you at least select the Patient Status and Practice filters before advancing

Note: The Status selections will come from your practice management software patient statuses



- iii. The selected Patients screen will display the number of patients in the list, the active filters, and actual patient email and phone info

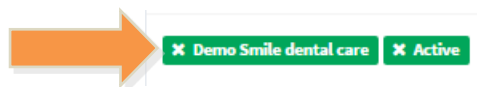


5989 Patients as of today

Filters: ✕ Demo Smile dental care ✕ Active + Select this list + Reset list

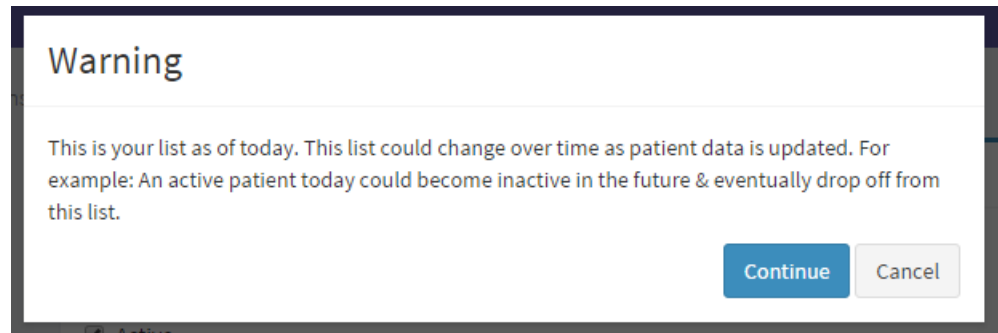
First name	Last name	Email	Phone	Status	Location	Gender
ALMA		✉	☎		Chino, Ontario	
ANSA		✉	☎	Active	Chino, Ontario	
ARTI		✉	☎	Active	Chino, Ontario	
CADE		✉	☎	Active	Chino, Ontario	
CADE		✉	☎	Active	Chino, Ontario	
CADE		✉	☎	Active	Chino, Ontario	
CADE		✉	☎	Active	Chino, Ontario	
CADE		✉	☎	Active	Chino, Ontario	
CEVE		✉	☎	Active	Chino, Ontario	
COST		✉	☎	Active	Chino, Ontario	
CTKI		✉	☎	Active	Chino, Ontario	
Eleanor	Abbott	✉	☎	Active	Bellingham, IN	Male
IOS		✉	☎	Active	Chino, Ontario	
OMO		✉	☎	Active	Chino, Ontario	

- a. You can remove any unwanted patient filters by clicking on the “x” in the green filter box



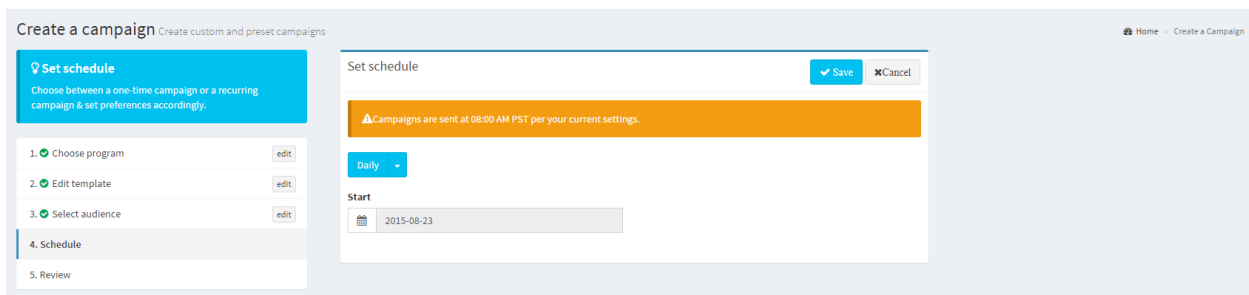
- b. You can page through all of the patients in the selected Patient screen by clicking the Next and Previous buttons in the lower right
- c. Clicking the Reset button will refresh the Select audience screen
- d. To advance to Step 4: Schedule click the Select this list button

Note: Before advancing to the next step **Patient HomePage™** will display this warning - simply click Continue after reviewing

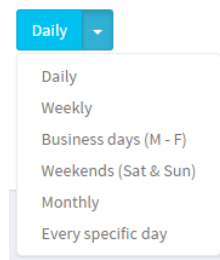


vii. Step 4: Schedule

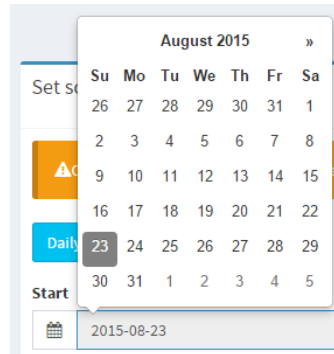
- i. The Set schedule screen will allow you to determine the start date and the frequency of your campaign



- a. Click the drop down menu to select the frequency of your campaign



- b. Click the date to select the start date for your campaign



Note: Your campaign will be sent automatically to patients at 8:00AM your local time

- c. Click Save to advance

1. Clicking Save will open a window asking you to enter the Program name

Note: The program name will be saved in your Active campaign list



- a. Once entering the Program name, clicking Done will take you to Step 5: Review

viii. Step 5: Review

- i. The Review campaign screen will display all the elements to be reviewed before sending the email/text/voice to your patients
 - a. Review Campaign will show the name, frequency, send method, type, start date, and end date (if applicable)

Campaigns Create & manage campaigns from automated daily reminders to marketing & promotional offers.

Almost there!
Please review your campaign details. If you're satisfied, click **Save campaign** and your new campaign will be on its way.

- Choose program [edit](#)
- Choose template [edit](#)
- Select audience [edit](#)
- Schedule [edit](#)
- Review**

Review campaign [Save campaign](#) [Cancel](#)

Program name	Frequency	Method	Type	Start	End
2 day	Daily		Appointment reminders	2016-04-05	Never

5989 Patients as of today

[View send details](#) [Active](#)

First name	Last name	Email	Phone	Status	Location	Gender
ALMA				Active	China, Ontario	
ANSA				Active	China, Ontario	
ARTI				Active	China, Ontario	
CADIE				Active	China, Ontario	
CADIE				Active	China, Ontario	
CADIE				Active	China, Ontario	

[Preview Email](#)

SUBJECT: Friendly Reminder

Hello {FirstName} {LastName},

This is a friendly reminder to confirm your upcoming scheduled appointment with {PracticeName}.

To confirm your appointment please click on "CLICK TO CONFIRM".

We are looking forward to seeing you for your appointment. Please be sure to arrive at least 10 minutes early. If you cannot make your scheduled appointment, please call {PracticePhoneNumber} to reschedule. There may be a fee charged for no shows and last minute cancellations.

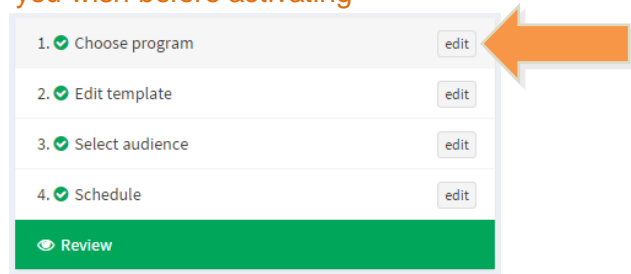
If you have any questions, please contact the office directly. Thank you and have a great day.

{PracticeLogo}

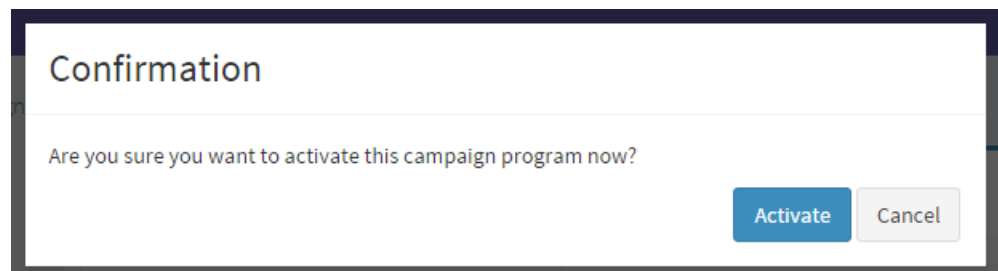
- b. You can once again review the patients in your send list
- c. You can also preview the email and text content one more time

- d. Activate campaign button will schedule the email/text/phone to be sent to the patients on your list

Note: You can click on the Edit button for the items in the wizard menu to go back and update anything you wish before activating



- e. After clicking on Activate campaign button a window will display a confirmation of your intent to activate your campaign



1. Click Activate to start the campaign

Note: Make sure everything is in order before clicking Activate campaign

Note: In most cases, you will have time to deactivate the campaign before it actually sends to any patients

Note: Clicking the final Activate button will open the Manage campaigns screen automatically

- b. Manage selection will display a screen enabling you to view your Active and Inactive **Patient HomePage™** campaigns, and view some key stats about each campaign

Campaigns Create & manage campaigns from automated daily reminders to marketing & promotional offers. Home > Manage Campaigns

[New program](#)

Active **Inactive**

Search:

Program name	Frequency	Method	Type	Start	End	Action
Appt Reminders Test A	Daily		Appointment reminders	08/23/2015	Never	
appt. reminder 2 days before	Daily		Appointment reminders	05/24/2012	Never	
erich is awesome	One Time		Invite patient(s)	07/11/2015	07/11/2015	
Today's birthday patients	Daily		Birthday reminders	05/24/2012	Never	
Today's patients feedback form	Daily		Today's patients feedback form	05/24/2012	Never	
Wish you many many happy returns of the day	Daily		Birthday reminders	08/22/2015	Never	
xmas 2014	One Time		Marketing Campaign(s)	08/22/2015	08/22/2015	
You have a dental appointment Tomorrow	Daily		Appointment reminders	08/22/2015	Never	

- i. Active tab view will display all of your currently running campaigns

- i. Clicking the red “Don’t” icon will move the campaign to the Inactive tab
- ii. Clicking the garbage can icon will delete the campaign completely
- iii. Clicking the “New Program” button will take you back to the first step of the Create a campaign wizard
- iv. Clicking on the Program name link will display the Campaign details screen

Campaigns Create & manage campaigns from automated daily reminders to marketing & promotional offers. Home > Manage Campaigns

[Manage campaigns](#)

[Campaign details](#)

[Performance Report](#)

day details Opt Out Deactivate Details

FREQUENCY: Daily

METHOD:

DURATION: 4/5/2015

STATUS: ACTIVE

5000 Patients as of today

[New leads added](#) [Active](#)

First name	Last name	Email	Phone	Status	Location	Gender
ALMA				Active	Chino, Ontario	
ANGA				Active	Chino, Ontario	
ARTI				Active	Chino, Ontario	
CADE				Active	Chino, Ontario	
CADE				Active	Chino, Ontario	
CADE				Active	Chino, Ontario	

Preview Email

SUBJECT: Friendly Reminder

Hello {FirstName} {LastName},

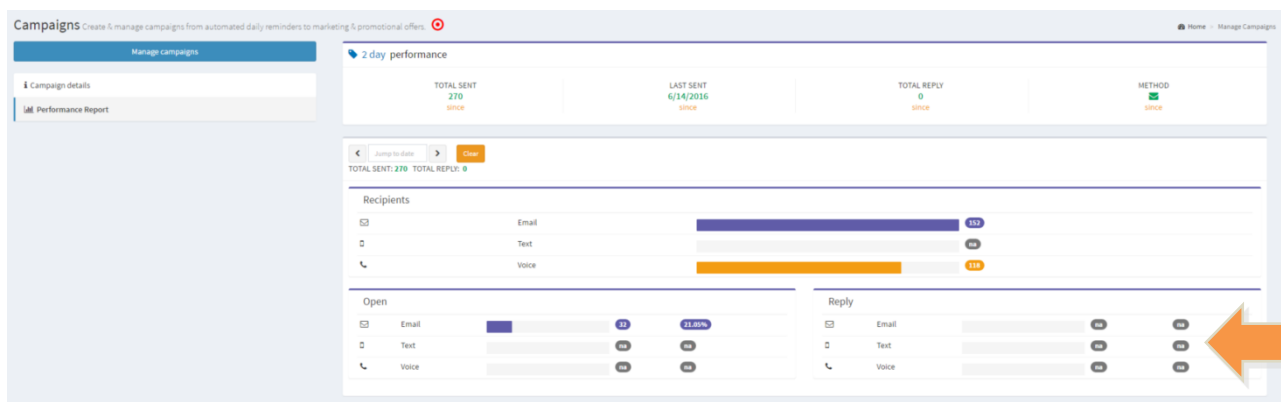
This is a friendly reminder to confirm your upcoming scheduled appointment with {PracticeName}. To confirm your appointment please click on "CLICK TO CONFIRM".

We are looking forward to seeing you for your appointment. Please be sure to arrive at least 15 minutes early.

If you cannot make your scheduled appointment, please call {PracticePhoneNumbers} to reschedule. There may be a fee charged for no shows and last minute cancellations.

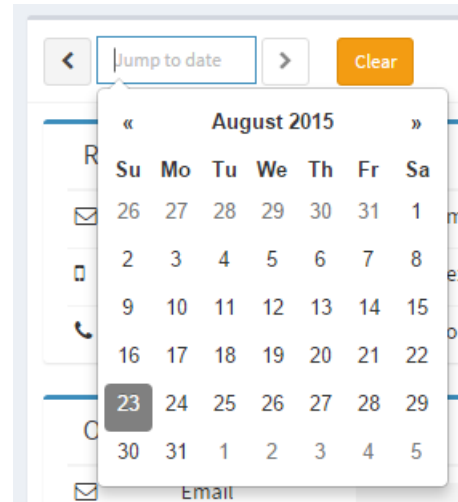
If you have any questions, please contact the office directly. Thank you and have a great day.

- a. The campaign details section will display
 1. Frequency (how often the campaign runs)
 2. Method (how the campaign is sent, including the last run date)
 3. Duration (the campaign start date, and the end date)
 4. Status (active or inactive)
- b. You can Edit, Deactivate, or Delete the campaign using the buttons in the upper right
- c. You can review the selected patients in your campaign
- d. You can preview the email/text/voice templates also
- e. Clicking the Manage Campaigns button will take you back to the main Active/Inactive screen
- f. Clicking the Performance Report will take you to the performance statistics screen



1. Performance metrics will display Total Sent, Last, Sent, Total Reply, Method

2. Clicking in the Jump to date will allow you to select a date to review



- a. The forward and back toggle buttons will move the date forward or backwards
 - b. Clear will remove the current date selection
3. The metrics will display total numbers and percentages of Recipients, Open, and Reply
Note: The metrics displayed will be filtered by the date selection
4. Clicking the Manage Campaigns button will take you back to the main Active/Inactive screen
5. Clicking the Campaign details will take you back to the Campaign details screen

ii. Inactive tab will display all of your **Patient HomePage™** campaigns that are not currently running

i. Clicking the green “start” icon will move the campaign to the Active campaigns tab

Campaigns Create & manage campaigns from automated daily reminders to marketing & promotional offers. Home > Manage Campaigns

[New program](#)

Active Inactive

Search:

Program name	Frequency	Method	Type	Start	End	Action
14 Day Appt Reminder	Daily		Appointment reminders	07/10/2014	Never	
appt. reminder 1 day before	Daily		Appointment reminders	07/03/2013	Never	
My New Campaign	Daily		All new patients from today	06/04/2015	Never	

ii. Clicking the garbage can icon will delete the campaign completely

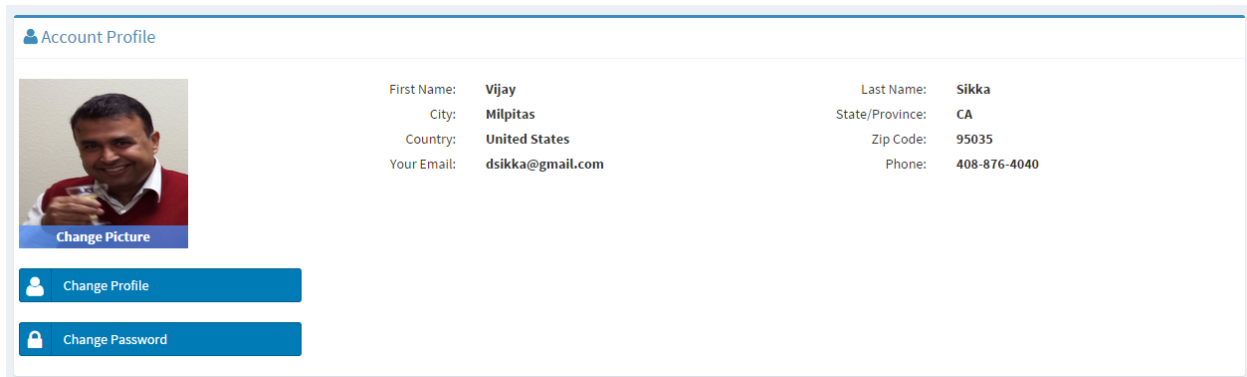
iii. Clicking the “New Program” button will take you back to the first step of the Create a campaign wizard

Note: The Inactive campaigns screen will function exactly like the Active campaigns screen

7. Setting Up Your Patient HomePage™ Account

Note: You can get to settings by clicking on the Settings link in the navigation menu on the left of the screen

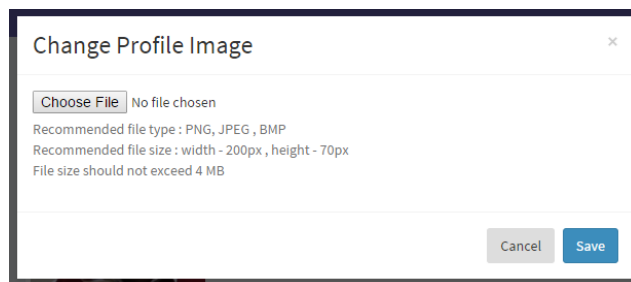
a. Account Profile



The screenshot shows the 'Account Profile' page. On the left, there is a profile picture of a man in a red sweater, with a 'Change Picture' button below it. Below the picture are two more buttons: 'Change Profile' and 'Change Password'. On the right, there is a table of profile information:

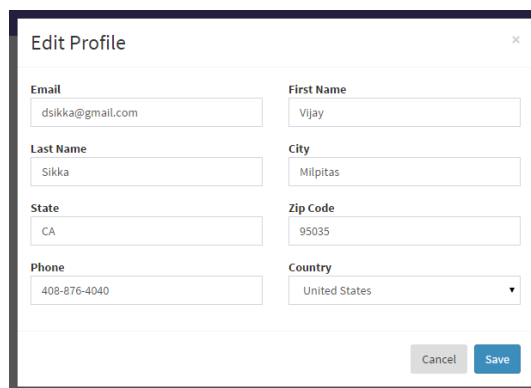
First Name:	Vijay	Last Name:	Sikka
City:	Milpitas	State/Province:	CA
Country:	United States	Zip Code:	95035
Your Email:	dsikka@gmail.com	Phone:	408-876-4040

- i. Clicking on “Change Picture” will allow you to setup/change your profile picture



The screenshot shows a 'Change Profile Image' dialog box. It has a 'Choose File' button and the text 'No file chosen'. Below this, it lists recommended file specifications: 'Recommended file type : PNG, JPEG , BMP', 'Recommended file size : width - 200px , height - 70px', and 'File size should not exceed 4 MB'. At the bottom right, there are 'Cancel' and 'Save' buttons.

- ii. Clicking on “Change Profile” will allow you to edit the info in your Account Profile



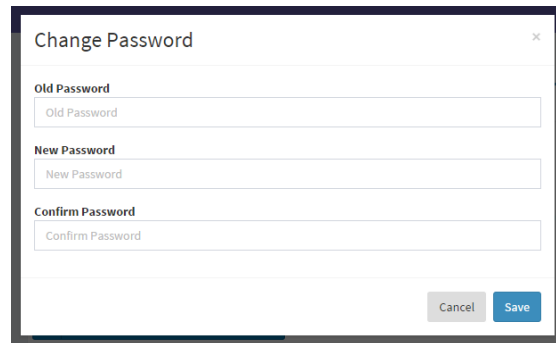
The screenshot shows an 'Edit Profile' dialog box. It contains several input fields for editing profile information:

Email	dsikka@gmail.com	First Name	Vijay
Last Name	Sikka	City	Milpitas
State	CA	Zip Code	95035
Phone	408-876-4040	Country	United States

At the bottom right, there are 'Cancel' and 'Save' buttons.










- iii. Clicking on “Change Password” will allow you to update your sign in password

Note: In order to change your password using this method, you will need to know your old password – we recommend updating your password every 30 days



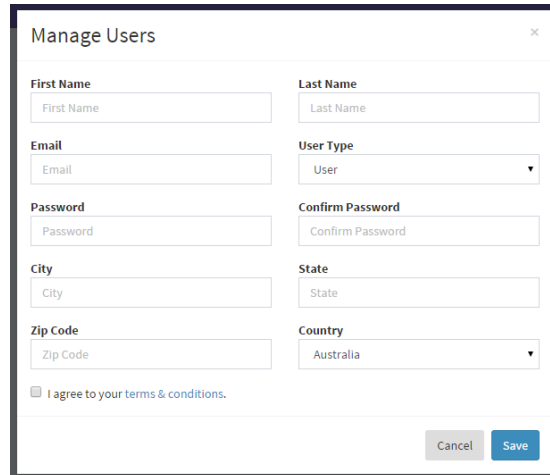
A modal dialog box titled "Change Password" with a close button (X) in the top right corner. It contains three input fields: "Old Password", "New Password", and "Confirm Password". At the bottom right, there are two buttons: "Cancel" and "Save".

b. Manage Users

Manage Users				
				Add User
Email	Name	User Type	Date Registered	Action
ADAF@sikkasoftware.com	ADAF Malp	User	08/11/2014	  
dctest@sikkasoft.com	DCEnterprise Testing	User	01/27/2015	  
erich.heston@sikkasoftware.com	Edog Heston	Admin	07/10/2015	  

- i. Click the “Add User” button will allow to add a new user to your account

- i. Fill out the required info, agree to the terms & conditions, and click “Save” – and the new user will appear in the user list screen

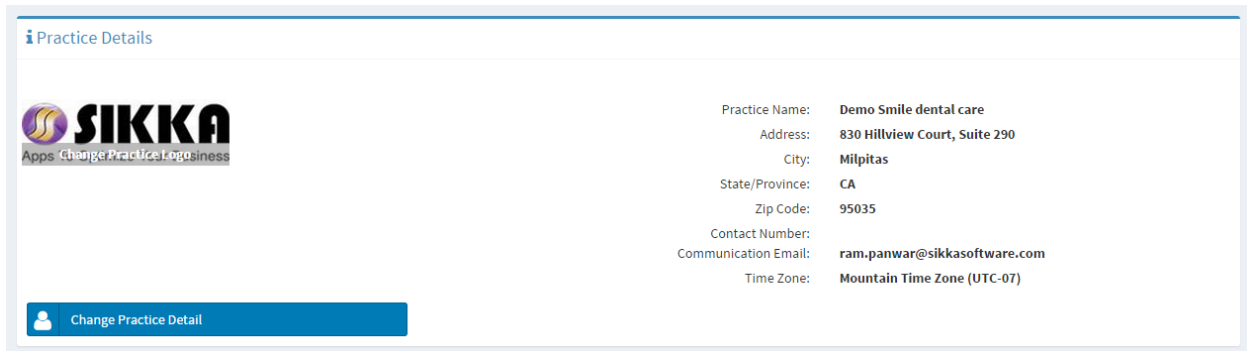


The 'Manage Users' form is a modal window with a close button (X) in the top right corner. It contains the following fields and controls:

- First Name:** Text input field with placeholder 'First Name'.
- Last Name:** Text input field with placeholder 'Last Name'.
- Email:** Text input field with placeholder 'Email'.
- User Type:** Dropdown menu with 'User' selected.
- Password:** Text input field with placeholder 'Password'.
- Confirm Password:** Text input field with placeholder 'Confirm Password'.
- City:** Text input field with placeholder 'City'.
- State:** Text input field with placeholder 'State'.
- Zip Code:** Text input field with placeholder 'Zip Code'.
- Country:** Dropdown menu with 'Australia' selected.
- Agreement:** A checkbox labeled 'I agree to your terms & conditions.' with a link to 'terms & conditions'.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

- ii. Clicking “Access” under Actions will allow you to select practice level access for each user
- iii. Clicking “Edit” under Actions will allow you to change the info for that particular user
- iv. Clicking “Remove” under Actions will delete that particular user account

c. Practice Details



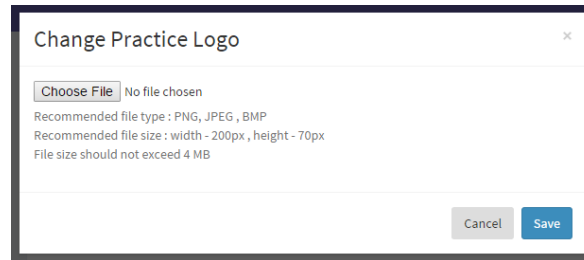
The 'Practice Details' page shows the following information:

- Header:** 'Practice Details' with an information icon (i).
- Logo:** SIKKA logo with the tagline 'Apps. Change Practice. Log. Business'.
- Practice Information:**
 - Practice Name: Demo Smile dental care
 - Address: 830 Hillview Court, Suite 290
 - City: Milpitas
 - State/Province: CA
 - Zip Code: 95035
 - Contact Number: (blank)
 - Communication Email: ram.panwar@sikkasoftware.com
 - Time Zone: Mountain Time Zone (UTC-07)
- Action:** A blue button labeled 'Change Practice Detail' with a user icon.

- i. You can click on the logo (Change Practice Logo) to upload your own practice logo to your account

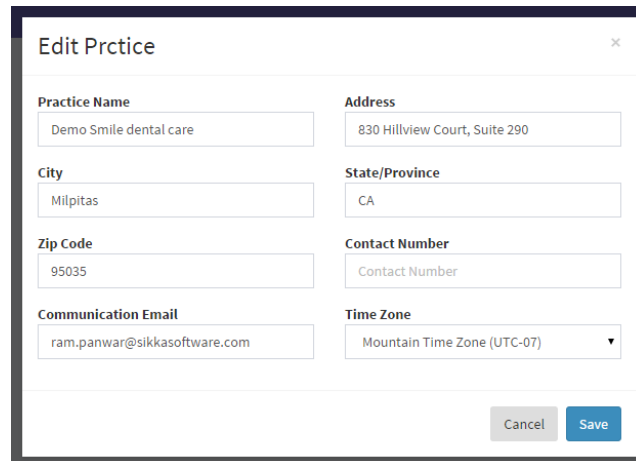
Note: The recommended logo should be PNG, JPEG, or BMP, and 200px width – 70px height, and smaller than 4MB in size

Note: You uploaded practice logo will be displayed to patients on the patient portal, and can also be added to your automated campaigns



A dialog box titled "Change Practice Logo" with a close button (X) in the top right corner. It contains a "Choose File" button, the text "No file chosen", and recommended file specifications: "Recommended file type : PNG, JPEG , BMP", "Recommended file size : width - 200px , height - 70px", and "File size should not exceed 4 MB". At the bottom right are "Cancel" and "Save" buttons.

- ii. Change Practice Detail



An "Edit Practice" dialog box with a close button (X) in the top right corner. It contains several input fields arranged in two columns. The left column includes "Practice Name" (with "Demo Smile dental care"), "City" (with "Milpitas"), "Zip Code" (with "95035"), and "Communication Email" (with "ram.panwar@sikkasoftware.com"). The right column includes "Address" (with "830 Hillview Court, Suite 290"), "State/Province" (with "CA"), "Contact Number" (with "Contact Number"), and "Time Zone" (a dropdown menu with "Mountain Time Zone (UTC-07)"). At the bottom right are "Cancel" and "Save" buttons.

d. Regional Settings

Regional Settings

United States

Numbers

Number of digits after decimal
0

Number separator
,

Negative number format
(n)

Number grouping
000,000,000.00

Preview
Positive: 123,456,790
Negative: (123,456,790)

Currency

Number of digits after decimal
0

Currency separator
,

Positive currency format
\$

Negative currency format
(\$)

Preview
Positive: \$123,456,790
Negative: (\$123,456,790)

Time

Short time format
HH:mm

Long time format
h:mm:ss tt

AM symbol
AM

PM symbol
PM

- i. You have the option to setup your regional settings by selecting your country (region)
 - i. You can also select the individual formatting for Numbers, Currency, Time, and Date

e. Scheduler & Duration

- i. Scheduler Time will allow you to setup the available blocks of time that will display to patients when they request appointments of your practice via **Patient HomePage™**
 - i. You can define whether your practice is closed, your practice's daily open and close times, and your scheduled lunch hour
 - ii. Click "Save Scheduler" button to save your settings

Scheduler Time

		Open	Close
Monday	<input type="checkbox"/> Close	07:00 AM	07:00 PM
Tuesday	<input type="checkbox"/> Close	07:00 AM	07:00 PM
Wednesday	<input type="checkbox"/> Close	07:00 AM	07:00 PM
Thursday	<input type="checkbox"/> Close	06:00 AM	05:30 PM
Friday	<input type="checkbox"/> Close	06:30 AM	07:00 PM
Saturday	<input type="checkbox"/> Close	07:00 AM	07:00 PM
Sunday	<input type="checkbox"/> Close	07:00 AM	07:00 PM

Lunch Break

From
01:00 PM

To
02:00 PM

Save Scheduler

- ii. Procedure Duration will allow you to setup the time duration for a list of the most often requested appointments from patients via **Patient HomePage™**
- i. Use the drop-down selections for each procedure and click the “Save Duration” for settings to apply

Procedure Duration

Any Procedure 30 min	Dental Consultation 30 min	Dental Follow Up 30 min
Dental Cleaning 1 hr	Emergency Dentist Visit 30 min	Braces 30 min
Bridge 2 hr	Crown 30 min	Dentures 30 min
Filling 1.5 hr	Gum Surgery 30 min	Implant 30 min
Invisalign 45 min	Retainers 30 min	Root Canal 30 min
Tooth Extraction 15 min	Tooth Whitening 10 min	Venners 15 min
Wisdom Tooth Problem 10 min		

Save Duration

f. My Service

My Service		
Service Type	Status	Start Date
PatientHomePage	ON	01/24/2015

- i. Displays whether the **Patient HomePage™** service is on/off, and the date services were started

g. Reports

The screenshot shows the 'Reports' section of the Patient HomePage interface. It contains two main report settings:

- Campaigns / ROI report**: A section titled 'I would like to receive PatientHomePage campaigns/ROI report' with four radio button options: ☒ Weekly, ☐ Monthly, ☐ Both(Weekly,Monthly), and ☐ None.
- Confirmed / not responded appointment reminders report**: A section titled 'Everyday I would like to receive a list of patients who have Confirmed / not responded to appointment reminders' with a dropdown menu currently set to 'same day'.

A blue 'Save' button is located at the bottom right of the form.

- i. Campaigns / ROI Report contains your return on investment (ROI) using **Patient HomePage™**
 - i. This report will automatically be sent to your email address unless you select “None”
Note: ROI is calculated using the campaigns and how much adjusted production comes from those patients who respond to those campaigns
- ii. Confirmed / Not Responded Appointment Reminders Report contains the lists of patients who have confirmed and not responded to your appointment reminders campaign
 - i. You can select how many days out you would like to see the appointment reminders responses using the drop down menu
Note: This report will be automatically sent to your email address containing patients with same day appointments by default – you can select “stop” if you do not want to receive this report

h. Manage Practice

Manage Practice						
Practice ID	Practice Name	Practice Key	Address	City	State	Zip
1	Demo Smile Dental Care	50EEC238D106D6FUKMM	95035	Milpitas	CA	95035
2	Sikka	E8AB552DD106B6BUKMM	43123	Milpitas	CA	43123
3	Test	22E98158D107374VKIG	24,Alpha Towar	Milipitus	MH	41424
4	John Doe	5A3C0098D10686EVKIG	123 Milpitas circle	Milpitas	ca	95035
5	QA	BDC1C276D103030VKIG	Test	QA	MH	414001
6	Pathak	84CE6E8CD107468VKIG	Milpitas	Milpitas	Ca	95132
7	Pathak qa	8295CA5DD107468VKIG	Dgjfifjgjkghljh	Nyc	Ny	12345
8	TEST	2FD52C67D105354VKIG	TEST	TEST	TEST	TEST

- This screen displays the practices that have been added to your **Patient HomePage™** account, or are present in your practice management software
- Clicking the “Add A Practice” button will allow you to add another practice to your account
Note: You only need this option if you are a multi-location practice, or have a segmented database in your practice management software

i. Portal Settings

Portal Settings

☐ Do not display Treatment Plan to patients on PatientHomepage

☐ Do not display Insurance Claims to patients on PatientHomepage

☐ Do not display Statements to patients on PatientHomepage

☐ Do not display Request an Appointment button to patients on PatientHomepage

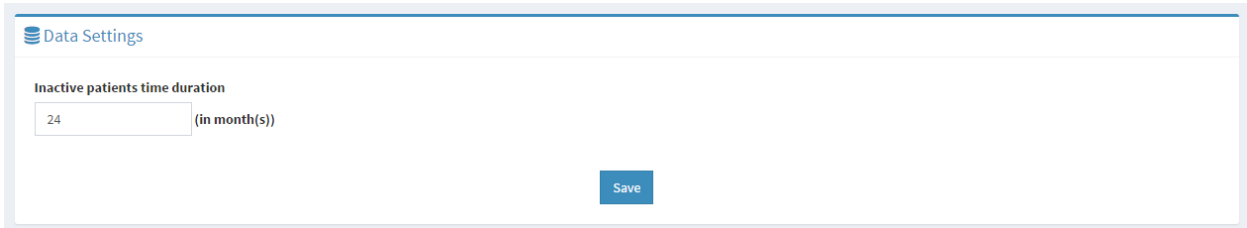
Save

- You can choose to display or not display Treatment Plan, Insurance Claims, Statement information, or the Request an Appointment functionality to your patients using **Patient HomePage™** - on their patient portal(s)

- i. Select the check box if you do not want to display this information

Note: This information will be displayed to patients by default on their portal

j. Data Settings

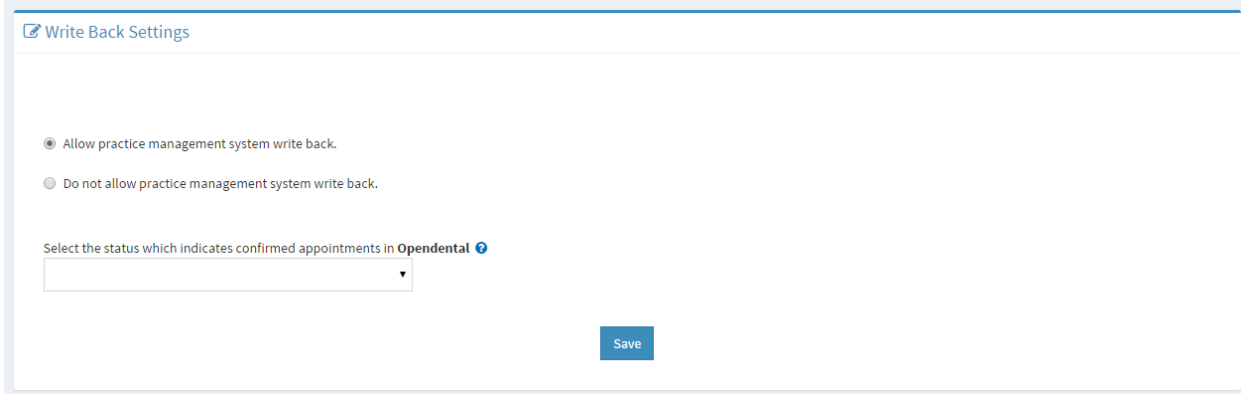


The screenshot shows a web interface titled "Data Settings". Below the title, there is a section labeled "Inactive patients time duration". Inside this section, there is a text input field containing the number "24" and a label "(in month(s))". To the right of the input field is a blue "Save" button.

- i. You can set Inactive patients time duration by selecting the number of months it has been since a patient has had an appointment

Note: This Inactive patient definition will be different than your practice management software, which determines that simply by patient status

k. Write Back Settings



Write Back Settings

☒ Allow practice management system write back.

☐ Do not allow practice management system write back.

Select the status which indicates confirmed appointments in Opendental ⓘ

Save

- i. You can choose to enable **Patient HomePage™** to write back confirmations for appointment reminders into your practice management software
 - i. You will be allowed to select the confirmation status from those entered in your practice management software

Note: The write back function will only write back the confirmation status in the appointment in your practice management software

Note: Write back functionality will only work for certain practice management software. Please check with Sikka Customer Success before allowing write back

I. Widgets

i. Widgets provide buttons and forms that you can place on your website

ii. Request An Appointment allows patients to click on the button and fill out a brief appointment request form

Request an Appointment

If you would like to show a request an appointment form on your own website or blog for your patients

Please copy / paste the below HTML embed code into your own website or blog for your patients

```
<iframe width="400" height="300" src="https://patienthomepage.sikkasoft.com/PrWebsiteAR.aspx?mid=0cLB0Kz6qw=" frameborder="0" allowfullscreen></iframe>
```

OR

If you would like to show a request an appointment form on your own website or blog for your patients

Please copy / paste the below HTML embed code into your own website or blog for your patients



Please copy / paste the below HTML embed code into your own website or blog for your patients

```
<a href="https://patienthomepage.sikkasoft.com/PrWebsiteAR.aspx?mid=0cLB0Kz6qw=" target="_blank" style="text-decoration:none;"></a>
```

i. Clicking on the “Request Appointment” button will display this window

Request an Appointment

Name:

FirstLast

Phone:

(555) 555-5555

Email:

XXX@XXX.XXX

Practice Name:

▼

Reason to visit:

▼

Date:

Time:

▼

Comments:

Additional comments for your provider:

Send Message

Please note that the date and time you requested may not be available. We will contact you to confirm your actual appointment details.

ii. You can copy the code for the form, or for the button and put them on your website for patients to interact with PatientHomePage™ right on your site

Note: Appointment requests are emailed directly to your email address, and your PatientHomePage™ inbox

ii. Reviews & Ratings

- i. Read Reviews allows patients to click on the button and read reviews or leave a review of your practice

Reviews & Ratings

If you would like to show a reviews & ratings form on your own website or blog for your patients

Please copy / paste the below HTML embed code into your own website or blog for your patients

```
<iframe width="400" height="300" src="https://patienthomepage.sikkasoft.com/PrReviews.aspx?mid=OCLBOKBz6qw=" frameborder="0" allowfullscreen></iframe>
```

OR

If you would like to add a reviews & ratings button on your own website or blog for your patients

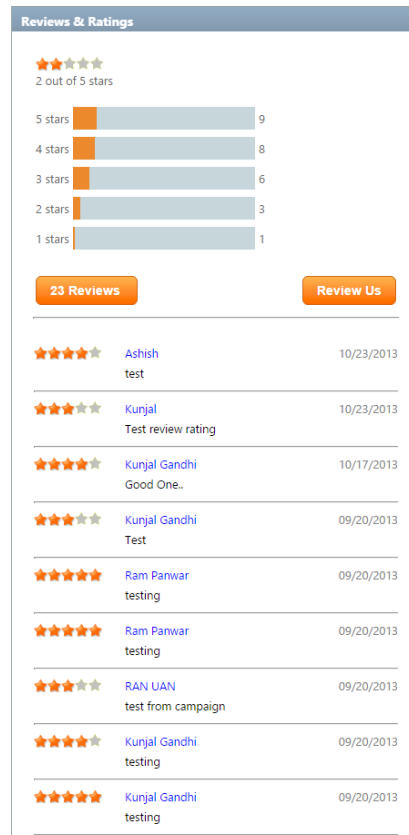
Click on the button to start a reviews & ratings.



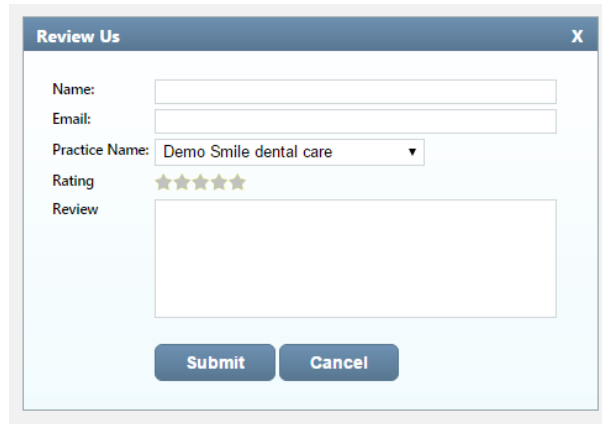
Please copy / paste the below HTML embed code into your own website or blog for your patients

```
<a href="https://patienthomepage.sikkasoft.com/PrReviews.aspx?mid=OCLBOKBz6qw=" target="_blank" style="text-decoration:none;"></a>
```

- i. Clicking on the “Read Reviews” button will display this window



- ii. Clicking on the “Review Us” button will display this form for patients to fill out and submit



The image shows a 'Review Us' form with the following fields: Name (text input), Email (text input), Practice Name (dropdown menu showing 'Demo Smile dental care'), Rating (five stars), and Review (text area). At the bottom are 'Submit' and 'Cancel' buttons.

Note: Reviews are emailed directly to your email address, and your **Patient HomePage™** inbox for you to approve before posting on your site via this widget

- iii. You can copy the code for the form, or for the button and put them on your website for patients to interact with **Patient HomePage™** right on your site

iii. Sign Up

- i. Sign Up allows patients to click on the button and connect with you by creating their own online **Patient HomePage™** account

Sign Up

If you would like to show a sign up form on your own website or blog for your patients

Please copy / paste the below HTML embed code into your own website or blog for your patients

```
<iframe width="400" height="300" src="https://patienthomepage.sikkasoftware.com/PrWebsiteSignUp.aspx?mid=0cL80Kb26qw=" frameborder="0" allowfullscreen"></iframe>
```

OR

If you would like to add a patient sign up button on your own website or blog for your patients

Click on the button to start a sign up.



Please copy / paste the below HTML embed code into your own website or blog for your patients

```
<a href="https://patienthomepage.sikkasoftware.com/PrWebsiteSignUp.aspx?mid=0cL80Kb26qw=" target="_blank" style="text-decoration:none;"></a>
```

- i. Clicking on the “Sign Up” button will display this window

- ii. You can copy the code for the form, or for the button and put them on your website for patients to interact with **Patient HomePage™** right on your site

Note: Signups are emailed directly to your email address, and your **Patient HomePage™** inbox for you to confirm they are your patient before linking accounts

iv. Sign In

- i. Sign In allows patients to click on the button and connect with you by signing into their own online **Patient HomePage™** account

Sign In

If you would like to show a sign in form on your own website or blog for your patients

Please copy / paste the below HTML embed code into your own website or blog for your patients

```
<iframe width="400" height="300" src="https://patienthomepage.sikkasoft.com/PrWebsiteSignIn.aspx?mid=0c1B0KbZ6qW=&wType=iframe" frameborder="0" allowfullscreen></iframe>
```

OR

If you would like to add a patient sign in button on your own website or blog for your patients

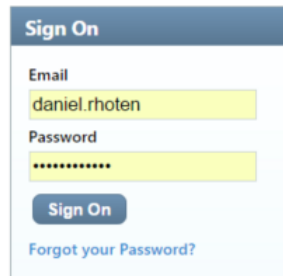
Click on the button to start a sign in.



Please copy / paste the below HTML embed code into your own website or blog for your patients

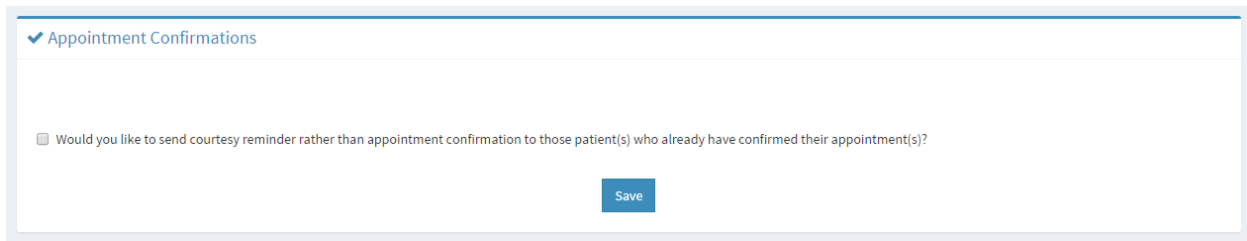
```
<a href="https://patienthomepage.sikkasoft.com/PrWebsiteSignIn.aspx?mid=0c1B0KbZ6qW=&wType=button" target="_blank" style="text-decoration:none;"></a>
```

- i. Clicking on the “Sign In” button will display this window

A screenshot of a 'Sign On' form. It has a blue header with the text 'Sign On'. Below the header, there are two input fields: 'Email' with the text 'daniel.rhoten' and 'Password' with a masked password '*****'. Below the password field is a blue 'Sign On' button. At the bottom, there is a link that says 'Forgot your Password?'.

- ii. You can copy the code for the form, or for the button and put them on your website for patients to interact with **Patient HomePage™** right from your site

m. Appointment Confirmations

A screenshot of the 'Appointment Confirmations' settings page. It has a blue header with a checkmark icon and the text 'Appointment Confirmations'. Below the header, there is a checkbox with the text 'Would you like to send courtesy reminder rather than appointment confirmation to those patient(s) who already have confirmed their appointment(s)?'. Below the checkbox is a blue 'Save' button.

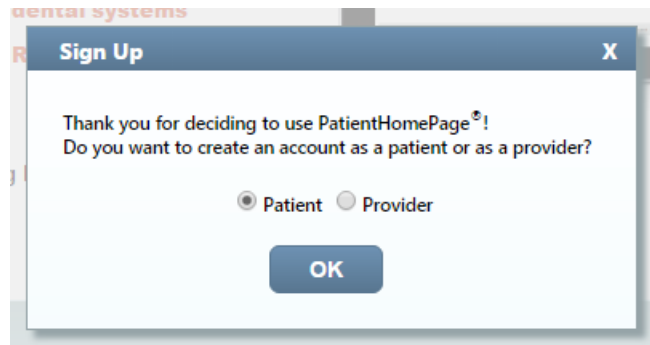
- i. Clicking on the box will setup a logic that if a patient has already confirmed an appointment reminder, then **Patient HomePage™** will not include the confirm button again in subsequent reminders – they will be courtesy reminders only

8. Signing Up for a Patient HomePage™ Patient Account

- Go to: <https://patienthomepage.sikkasoft.com/login.aspx>
- Click on “Sign Up” link



- Select “Patient” in the Sign Up window



- d. Fill out the online form (next page), agree to the terms, and click “Submit” button

Create an Account

Email:

Confirm Email:

Password:

Confirm Password:

First Name:

Last Name:

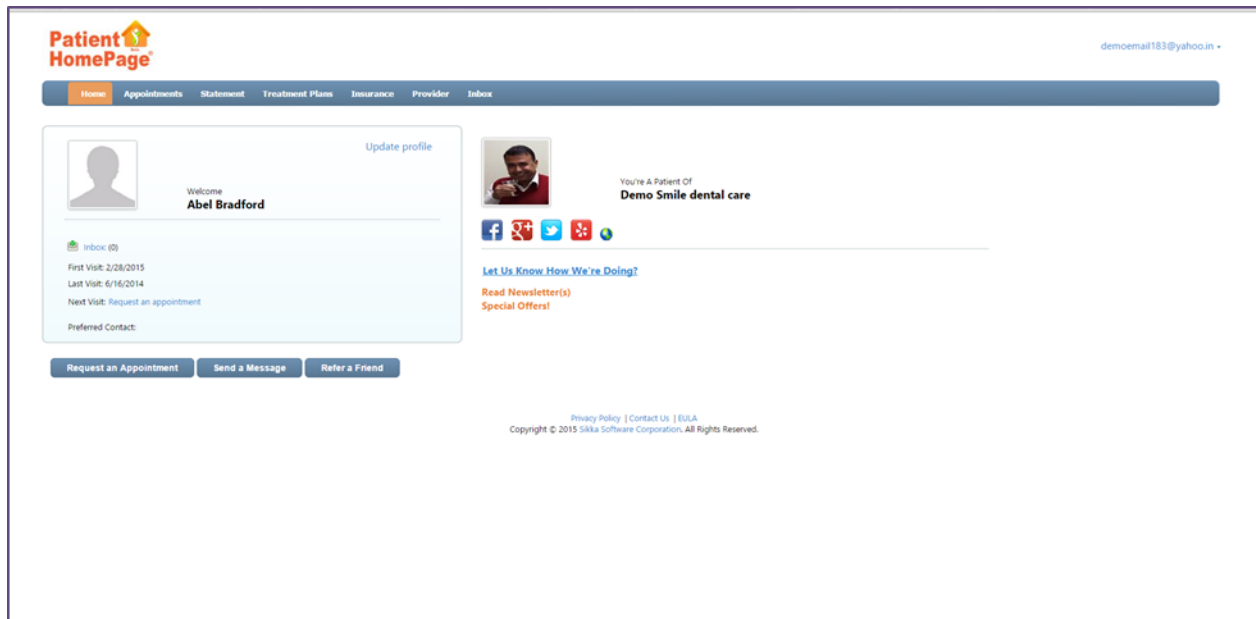
Phone Number:

☐ I agree to your [terms & conditions.](#)

Note: Make sure you remember your Email and Password. You will need these to sign in to your new **Patient HomePage™** account

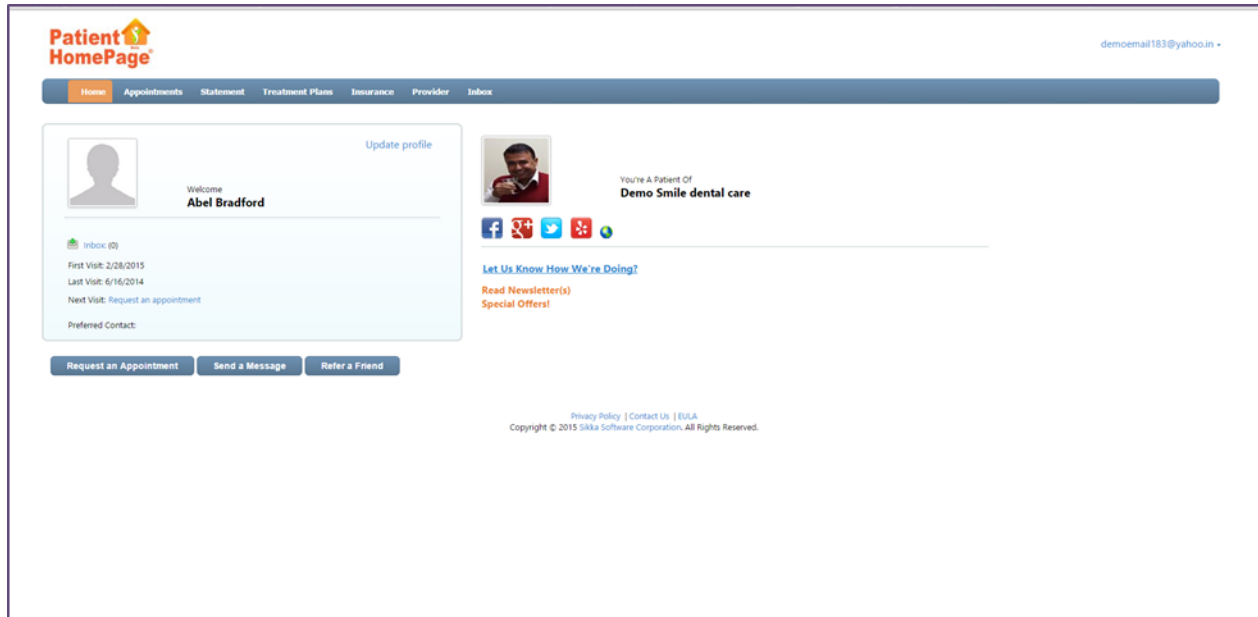
9. Signing In To Your Patient HomePage™ Patient Account

1. Enter your User ID and Password that you used when creating your account
Note: If you don't remember your User ID and/or Password click on "I forgot my password" or "I forgot my ID" and follow the simple instructions
2. When signing in for the first time, the License Agreement must be accepted by clicking the "Agree" button
3. After accepting the License Agreement you will see the Home page







10. Navigating Your PatientHomePage™ Patient Account

- a. Upon signing in, you will see the following features on the Home Page:
 - i. Email ID
 - ii. Navigation Menu
 - iii. Profile
 - iv. Provider
 - v. Request an Appointment
 - vi. Send a Message
 - vii. Refer a Friend

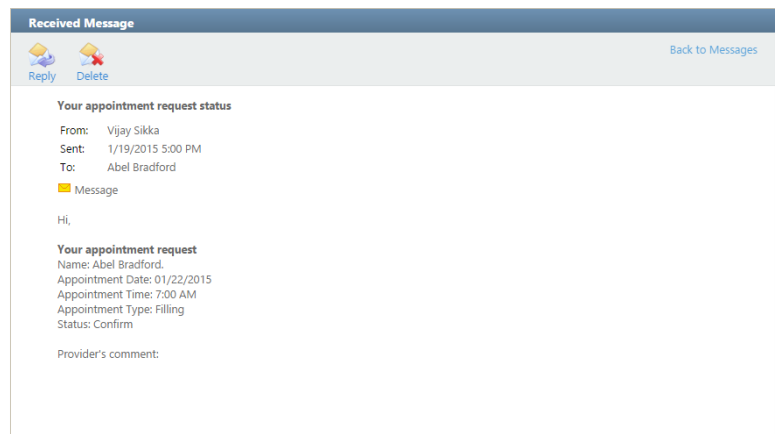


i. Email ID

- i. Clicking on the email ID in the upper right hand corner of the screen will display a menu with selections for Inbox, My Account, Logout
 - a. Inbox will display received and sent messages using PatientHomePage™

Inbox Sent Mail				
 Delete  Compose				
All	From	Subject	Date	
<input type="checkbox"/>	Vijay Sikka	Your appointment request status	1/19/2015 5:00 PM	
<input type="checkbox"/>	Vijay Sikka	Happy Birthday from your dentist	7/30/2015 5:00 PM	

1. You can Delete emails from your inbox using the Delete function or the red “X”
2. You can Compose new emails to send to your provider
3. Clicking on the Subject of an email will open that email message



- a. Clicking “Back to Messages” will send you back to your inbox

- b. My Account will display your My Profile page where you can Add Photo, Edit profile info, select preferred communication method, Change Password, Refer you friends, or Delete my account

My Profile

My profile

Add Photo

Patient ID : 466001
First Name : Abel
Last Name : Bradford
Birth Date : 8/1/2005
Address : P.O. Box 697, 6297 Mauris St.
City : Bay City
State : NT
Zip : D5V 6U0

Phone : 1-801-756-5355
Work Phone : 1-444-146-7166
Email : demoemail183@yahoo.in
Cell : 4086491888

Edit

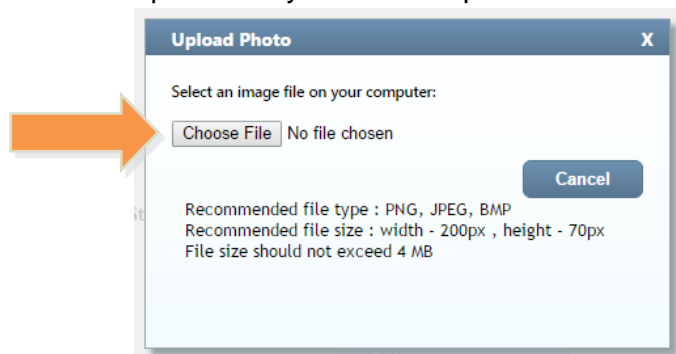
Delete my account

Your Preferred Communication method:

☐ Text Message ☐ Email
☐ Phone Call

Password management **Change Password**

1. Clicking Add Photo will allow you to choose an image file from your computer and upload it to your account profile



- Clicking Edit will allow you to edit the info on your profile page

The 'Edit Profile' window contains the following fields:

- First Name:
- Last Name:
- Birth Date: (MM/DD/YYYY)
- Phone:
- Work Phone:
- Cell:
- Address:
- City:
- State:
- Zip:

Buttons:

- You can select how you would like to receive communications from your provider (email, text, phone)

Note: These settings will filter messages from your provider to your preferred method

- Clicking on “Change Password” will allow you to update your password to sign in to your account

Note: You will need to remember your current password before changing your password this way

- Clicking on the Referral icon (and Add referral button) will allow you to refer a friend or colleague to your provider

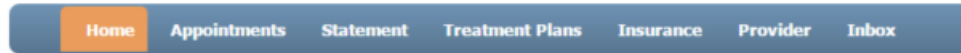
The 'Referrals by you' section includes a 'My profile' icon and an 'Add referral' button. An orange arrow points from the 'Add referral' button to the 'Add Referral' form.

The 'Add Referral' form contains the following fields:

- First Name:
- Last Name:
- Phone Number:
- Email Address:
- Comments:

Buttons:

11. Using Your PatientHomePage™ Navigation Menu Elements



i. Home

- i. Clicking “Home” will display the Home screen

ii. Appointments



Date	Time	Appt. Duration
11/4/2012	8:00 AM	100
10/27/2012	2:00 PM	30

- i. Clicking “Appointments” will display your historical appointment details with this particular provider

- ii. Clicking the “Request an Appointment” button will open the Request an Appointment window

iii. Statement

- i. Clicking “Statement” will display your financial details for that particular provider: your address and phone, your provider’s address and phone, your balance due, and your payment dates and running balance

Statement

Name: **Abel Bradford**

Address: P.O. Box 697, 6297 Mauris St.

City: Bay City, NT D5V 6U0

Phone: 1-801-756-5355

Provider: **Vijay Sikka**

Practice: Demo Smile dental care

Address: 830 Hillview Court, Suite 290



City: Milpitas, CA, 95035

Phone:

Balance Due: **\$0.00**

Date	Payment Type	Description	Amount
11/5/2012	Ins	Patient's 5-10% Discount	(\$433.00)
11/5/2012	Pay	Master Card Payment' Thank You	(\$1,743.00)
11/5/2012	Ins	Pre-Pay Discount	(\$100.00)
10/28/2012	Pay	Visa Payment' Thank You	(\$100.00)

- ii. Clicking the Accounts Receivable icon will display your A/R details




Patient Accounts Receivable

AR < 30 Days	AR 31-60 Days	AR 61-90 Days	AR > 90 Days
\$0.00	\$0.00	\$0.00	\$0.00

Note: This section of the patient portal can be removed from view on the patient portal, by using the provider portal settings

iv. Treatment Plans

- i. Clicking “Treatment Plans” will display your pending treatment plan details: your address and phone, your provider’s address and phone, and any pending treatment plans you have not yet completed



Pending Treatment Plans



Name : Abel Bradford	Practice Name : Demo Smile dental care
Address : P.O. Box 697, 6297 Mauris St.	Address : 830 Hillview Court, Suite 290
City : Bay City	City : Milpitas
State/Zip : NT D5V 6U0	State/Zip : CA,95035
Phone : 1-801-756-5355	Phone:

No data to display

Note: This section of the patient portal can be removed from view on the patient portal, by using the provider portal settings

v. Insurance

- i. Clicking “Insurance” button will display your insurance details (primary and secondary insurance carriers), and your remaining insurance coverage

Insurance Information

Insurance Details

Primary Insurance :
Name of Policy Holder :
Relationship of Patient to Policy Holder :
Policy Number :
Group Number :
Insured Party's Date of Birth : 01/01/1900

Secondary Insurance :
Name of Policy Holder :
Relationship of Patient to Policy Holder :
Policy Number :
Group Number :
Insured Party's Date of Birth : 01/01/1900

[Change](#)

Remaining Insurance Coverage

Individual yearly benefit :	\$0
Total amount of claims sent this year :	\$0
Total expected amount of claims :	\$0
Total amount paid :	\$0
Remaining insurance benefit :	\$0

Note: Your remaining insurance coverage will be what is remaining according to your provider (not your insurance company) – You will want to verify the remaining insurance benefit with your insurance carrier(s)

- ii. Clicking the “Change” button will allow you to update your primary and secondary insurance info

Insurance Information Form

Patient Name: Abel Bradford

Primary Insurance: *

Name of Policy Holder: *
First Last

Relationship of Patient to Policy Holder: *

Policy Number: *

Group Number: *

Insured Party's Date of Birth: *
01/01/1900
mm/dd/yyyy

Secondary Insurance:

Name of Policy Holder:
First Last

Relationship of Patient to Policy Holder:

Policy Number:

Group Number:

Insured Party's Date of Birth:
01/01/1900
mm/dd/yyyy

Submit **Cancel**

- a. Click “Submit” will send an email to your provider notifying them about your insurance changes

iii. Claims



- a. Clicking on the Claims icon will display the status of your outstanding insurance claims

Note: This section of the patient portal can be removed from view on the patient portal, by using the provider portal settings

vi. Provider

- i. Clicking “Provider” will display your provider’s details: name, practice, address, phone, email, and website link

Your current provider details

Provider Name: Kunjal QA Team Test
Practice Name: Panwar Dental Corporation
Address: 30 Fifth Avenue, 34th floor
City: Milpitas
State: california
Phone: 9978877303
Email: vikram.makwana@sikkasoftware.com
Website: <https://sikkasoft.com/>

Please Add provider.
Enter provider's Name, Zip, City, State to search.
Specialty : Dentist
Search : Search [How to add provider ?](#)

Provider Details Add as a provider

	Provider Name : A2GO Dentistry@150	Send Email
	Address : Toronto, Ontario M4P 1E8	
	Phone : 416-488-0916	
	Provider Name : B0GO Dentistry on Green lane	Send Email
	Address :	
	Phone :	

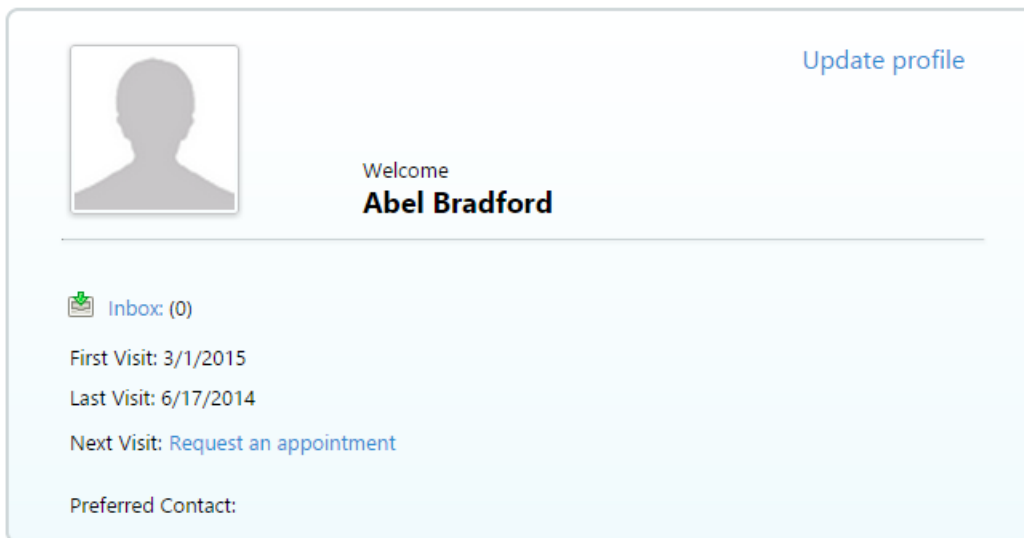
- ii. You can add a provider by choosing a specialty and searching our network of practices by name
Note: There’s also a link “How to add provider?” which will walk you through how to add a provider to your **PatientHomePage™** account
- iii. Clicking the “Send Email” button will send an email to that practice asking to confirm that you are indeed their patient – which will connect you automatically to your practice’s account

vii. Inbox

- i. Clicking “Inbox” will display your **PatientHomePage™** Inbox

ii. Profile

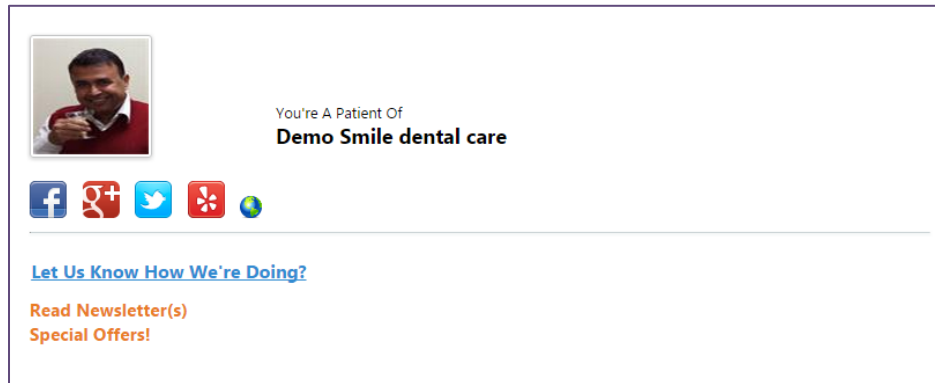
- i. Your profile section will display your profile details: name, number of new/unread emails in your inbox, first and last visit date to your provider, next visit date, and preferred contact method



- ii. Clicking "Update Profile" will open the My Profile screen which allows you to update your profile info
- iii. Clicking the "Inbox" link will open your **PatientHomePage™** inbox
- iv. Clicking the "Request an appointment" link will open the appointment request window

iii. Provider

- i. Your Provider section will display the details about your provider: photo, and name




- ii. The social networking icon links will open your provider's social networking page for: Facebook, Google Plus, Twitter, and Yelp
Note: Your provider will have to have set their social networking sites for these links to work



- iii. The website icon link will take you to your provider's website



- iv. Clicking on the “Let Us Know How We’re Doing?” link will open a feedback form that you can send to your provider



Feedback

How would you rate your overall visit?

☐ Excellent
☐ Very good
☐ Average
☐ Not so good

When your appointment was over, did you have a good understanding of your situation?

☐ Yes
☐ No
☐ I wish I knew more about my situation

Were your financial options explained to you?

☐ Yes
☐ No
☐ I already understand my financial options

Did you have to wait over 15 minutes past your appointment time to be seated? if so how long?

☐ No
☐ 15 to 30 minutes
☐ 30 to 45 minutes
☐ over 45 minutes

Did the staff greet you properly?

☐ Yes
☐ No
☐ Do not recall

Would you refer your friends and family to our office?

☐ Yes
☐ No
☐ Not sure

Tell us about your experience with our office. Please add your name, and your response may be posted on google. Thank you.

Note : This feedback will be directly sent to your provider.

Submit

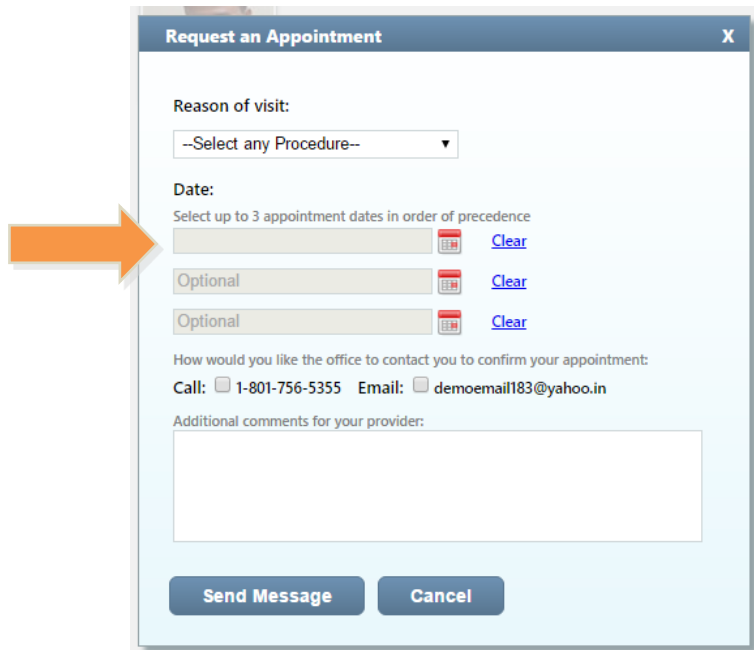
- i. Clicking the “Submit” button will send your results directly to your provider

Note: This will not post online anywhere, but only to your inbox. In the email you will have an option to approve the feedback which will post the comment on your widget (button for your website).

- v. Clicking the “Read Newsletter(s)” link will open the News letters, Special offers, Health Files page – where you can read any newsletters that your provider has sent out using **Patient HomePage™**
- vi. Clicking “Special Offers” link will also open the News letters, Special offers, Health Files page – where you can view any special offers your provider has sent out using **Patient HomePage™**

12. Request an Appointment

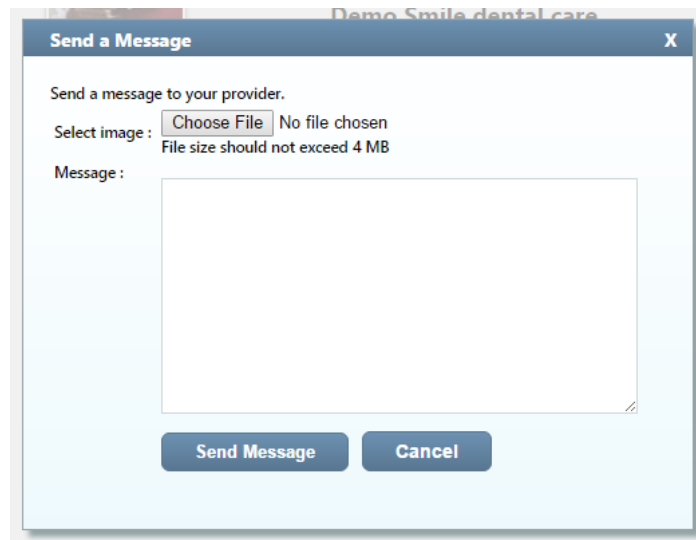
- i. Clicking “Request an Appointment” will open Request an Appointment window



- i. You can select from a list of procedures for your Reason of visit
- ii. You can choose up to 3 dates for your preferred appointment time by clicking on the red calendar icon next to each date field
 - a. Clicking “Clear” will remove the selected date
Note: These times will be considered as first, second, and third choices respectively
- iii. You can select to be called and/or sent an email by your provider in regards to your appointment request
- iv. You may also add any additional comments for your provider in your appointment request
- v. Clicking “Send Message” will send your appointment request to your provider

13. Send a Message

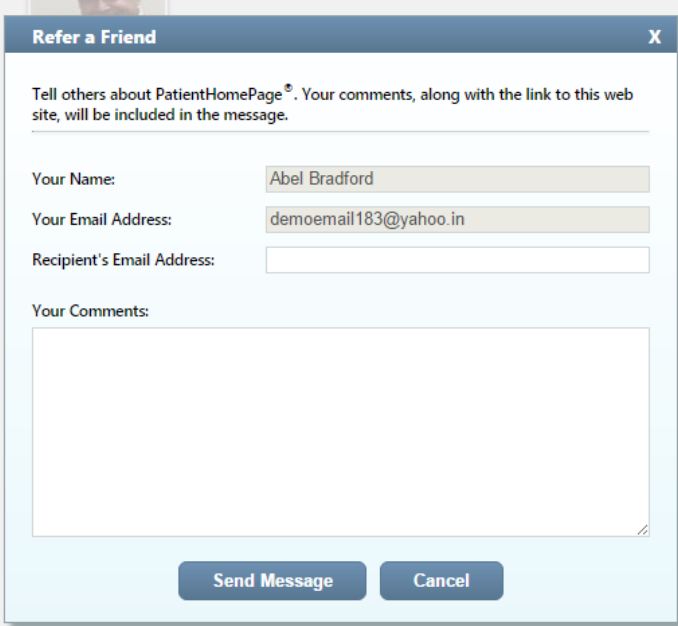
- i. Clicking the “Send a Message” button will open the Send a Message window



- i. You can compose a message of any kind and send it directly to your provider using the text field
- ii. You can attach any image or file to your message (like an image of a problem area of your tooth)
Note: The image or attachment can't be larger than 4MB
- iii. Clicking “Send Message” will send your message to your provider

14. Refer a Friend

- i. Clicking the “Refer a Friend” button will open the Refer a Friend window

A screenshot of a web browser window titled "Refer a Friend" with a close button (X) in the top right corner. The window contains a text area at the top with the instruction: "Tell others about PatientHomePage®. Your comments, along with the link to this web site, will be included in the message." Below this are three input fields: "Your Name:" with the text "Abel Bradford", "Your Email Address:" with the text "demoemail183@yahoo.in", and "Recipient's Email Address:" which is empty. Below these is a larger text area labeled "Your Comments:". At the bottom of the window are two buttons: "Send Message" and "Cancel".

- i. You can enter a friend's email address to refer them to Patient HomePage
Note: A link to join Patient HomePage™ will be included in the email message to your friend
- ii. You can include a brief message explaining why you think PatientHomePage™ would be the best idea for your friend
- iii. Clicking the “Send Message” button will send the referral message to your friend
Note: If you review any errors in your name or email address, you can go to Update Profile to correct them