PatientHomePage™

Version 3.0 User Guide

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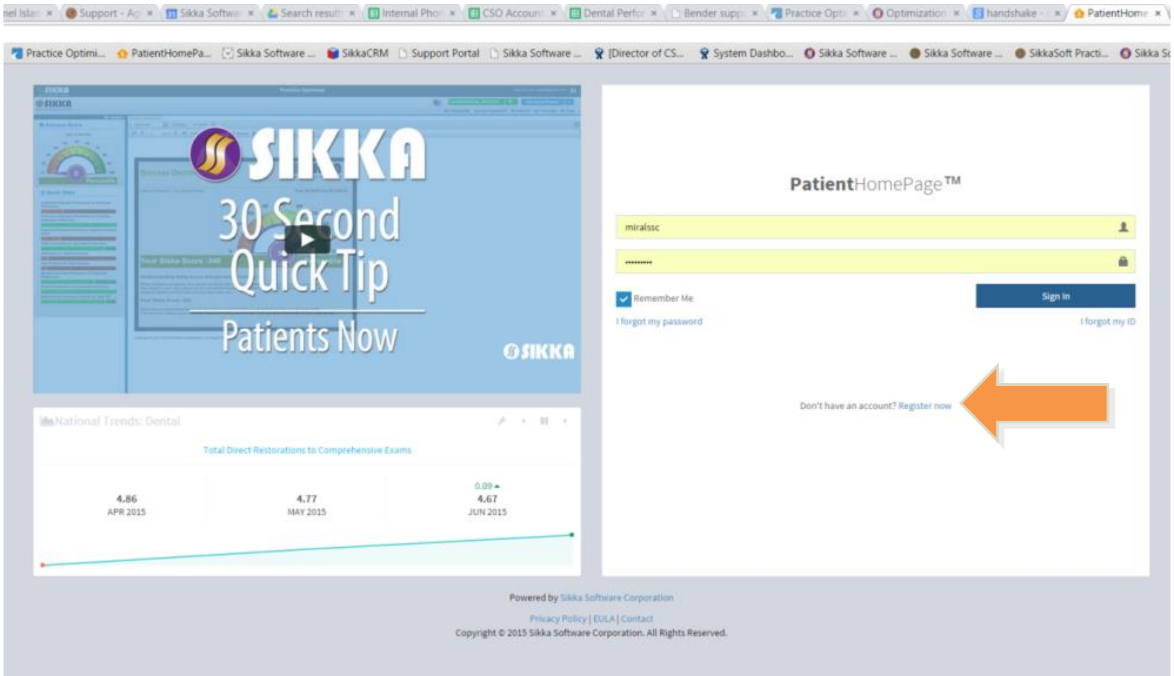
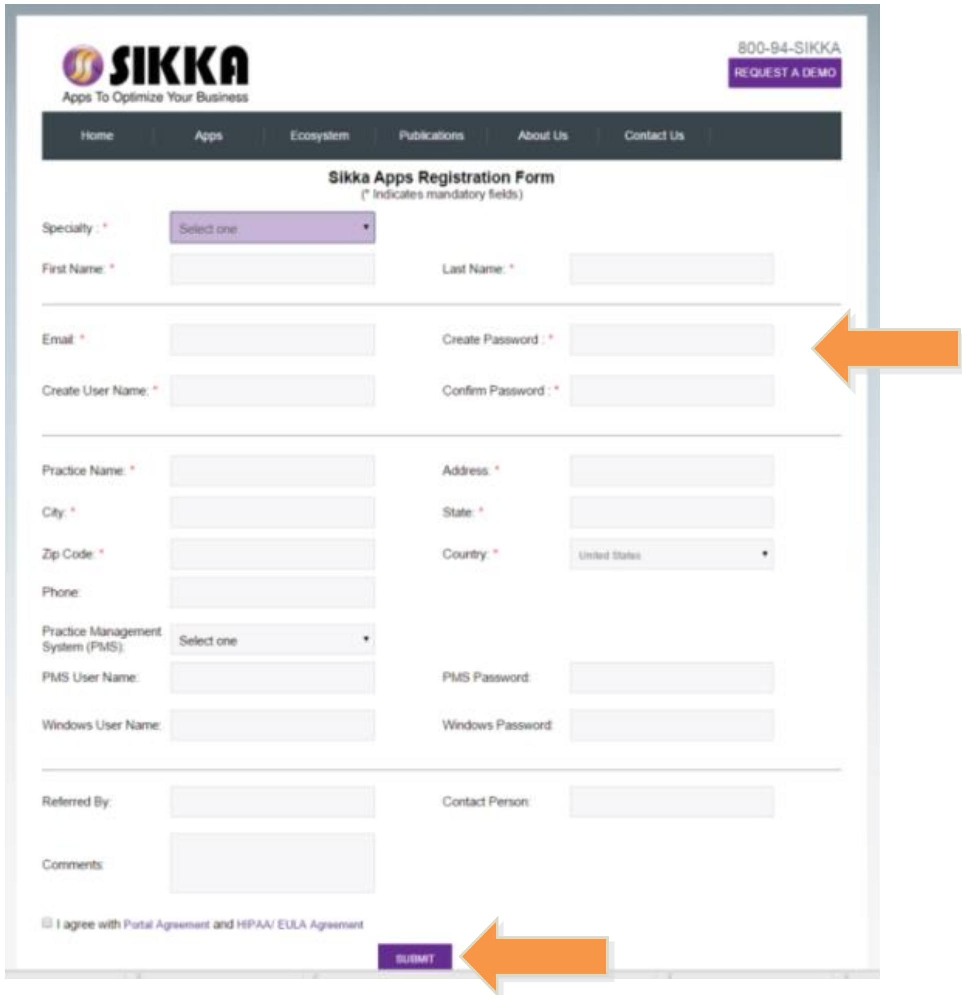
1. Signing Up for a **Patient**HomePage™ Provider Account

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



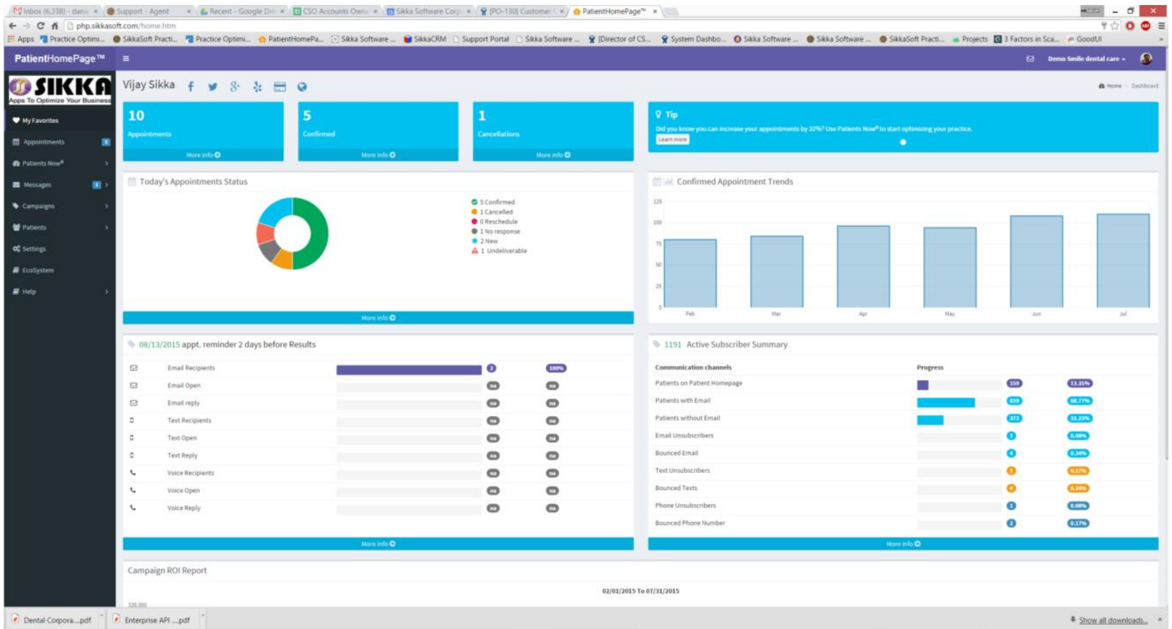
Note: In order to use **Patient**HomePage™ you will have to purchase a license and install the Sikka Platform Cloud (SPC) on your server or workstation where your practice management software resides

2. Signing In To PatientHomePage™ 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

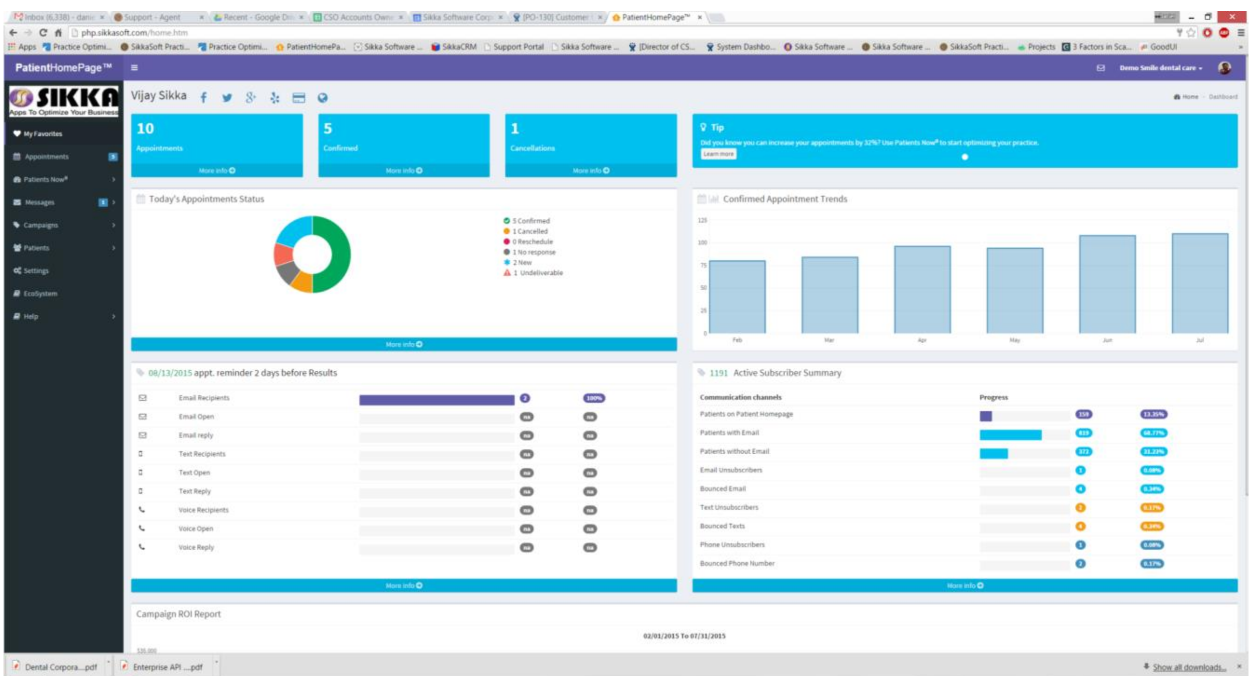
3. After accepting the License Agreement you will see the Home Page



3. Navigating the **Patient**HomePage™ Provider Home Page

1. Upon signing in, you will see the following features on the Home Page:

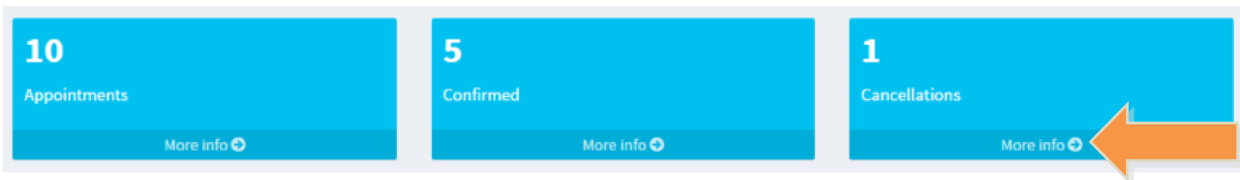
   a. Appointments, Confirmed, and Cancellations statistics
   b. Tips (on how to use **Patient**HomePage™)
   c. Today's Appointments Status
   d. Confirmed Appointment Trends
   e. Campaign statistics
   f. Active Subscriber Summary
   g. Campaign ROI Report
   h. Navigation icon
   i. Navigation menu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



A. Appointments, Confirmations, and Cancellations

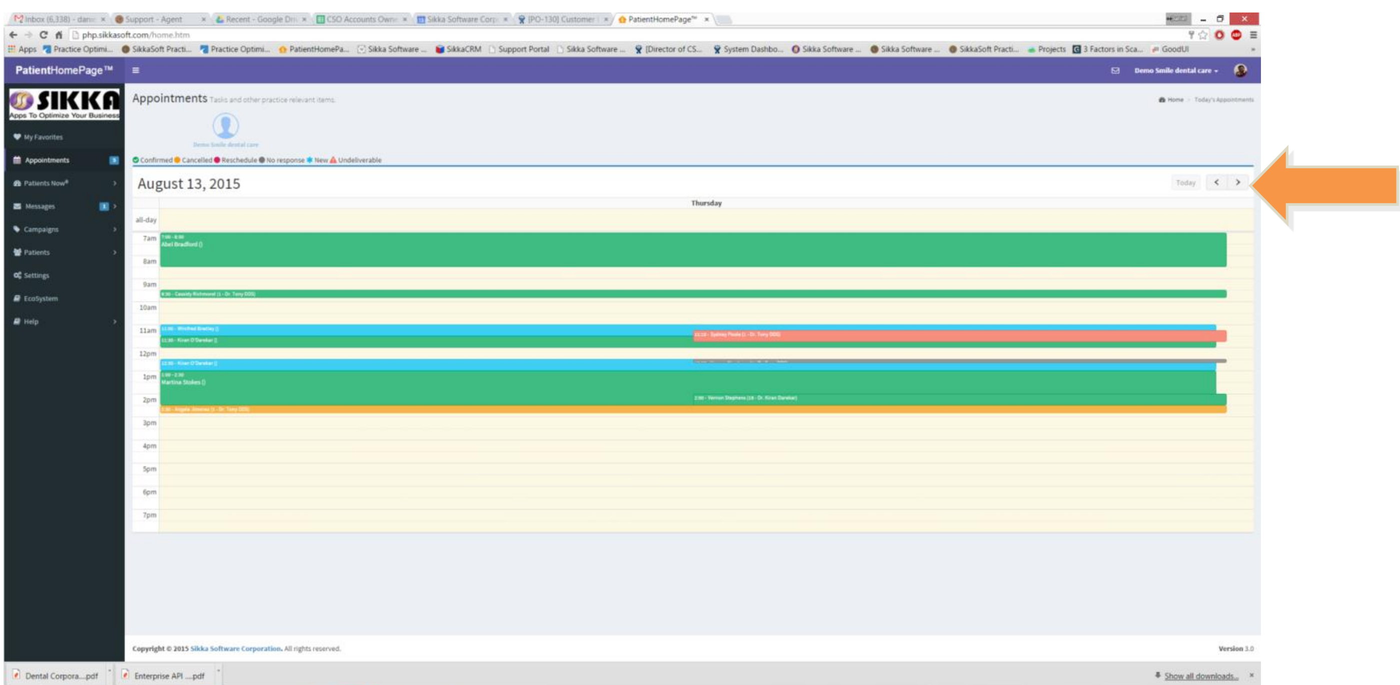
1. These blue boxes show the counts for Appointments, Confirmed appointments, and appointment Cancellations for the current day
   Note: These values are based on the last data refresh of your practice management software

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

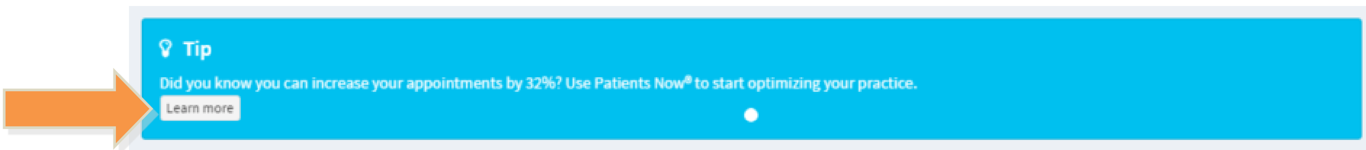


4. You may search for Appointments on other days in the week by using the left/right toggle arrows in the upper right

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

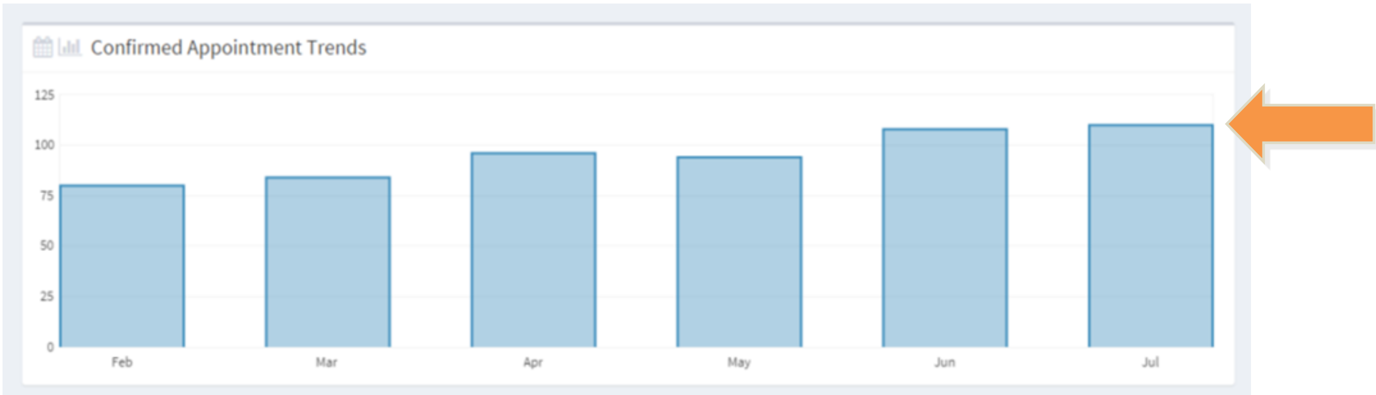
1. This doughnut graph will show you the percentages of patients in each status for today’s appointments

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

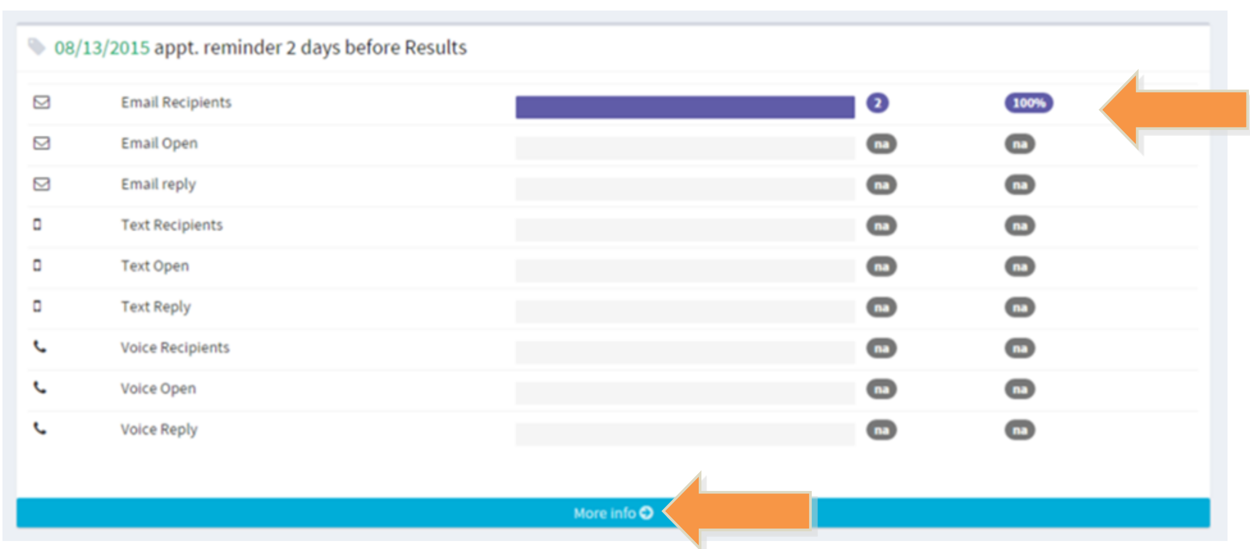
1. This bar graph will show you how many appointments were confirmed over the last 6 months



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

E. Campaign Statistics

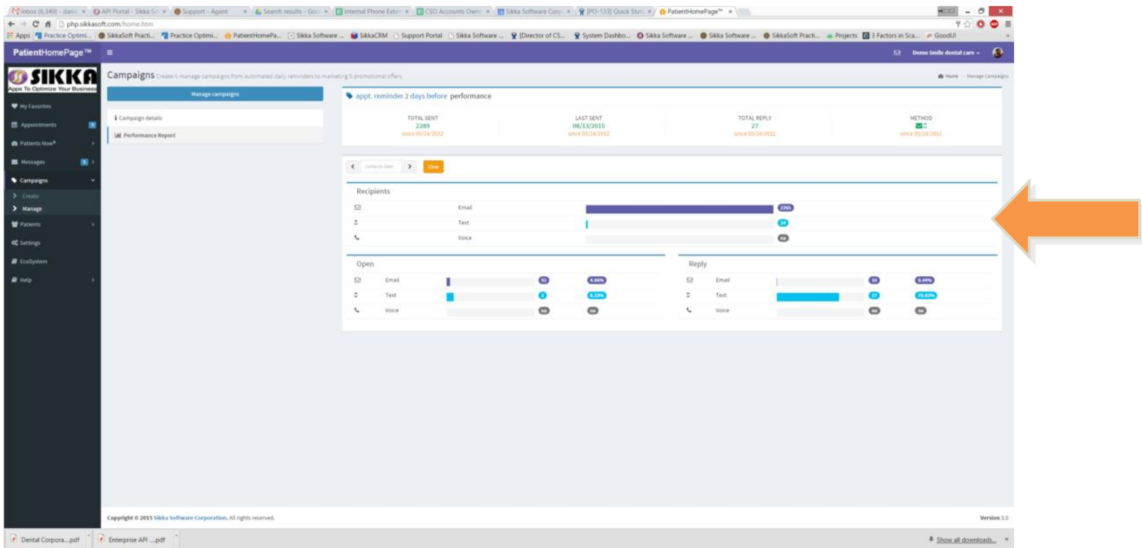
1. This report will measure Campaign sending activity for Email, Text, and Phone - counting number of recipients, number of opens, and number of responses



2. It will show you the actual number, and the percentage of patients who have received, opened, or replied to your campaigns

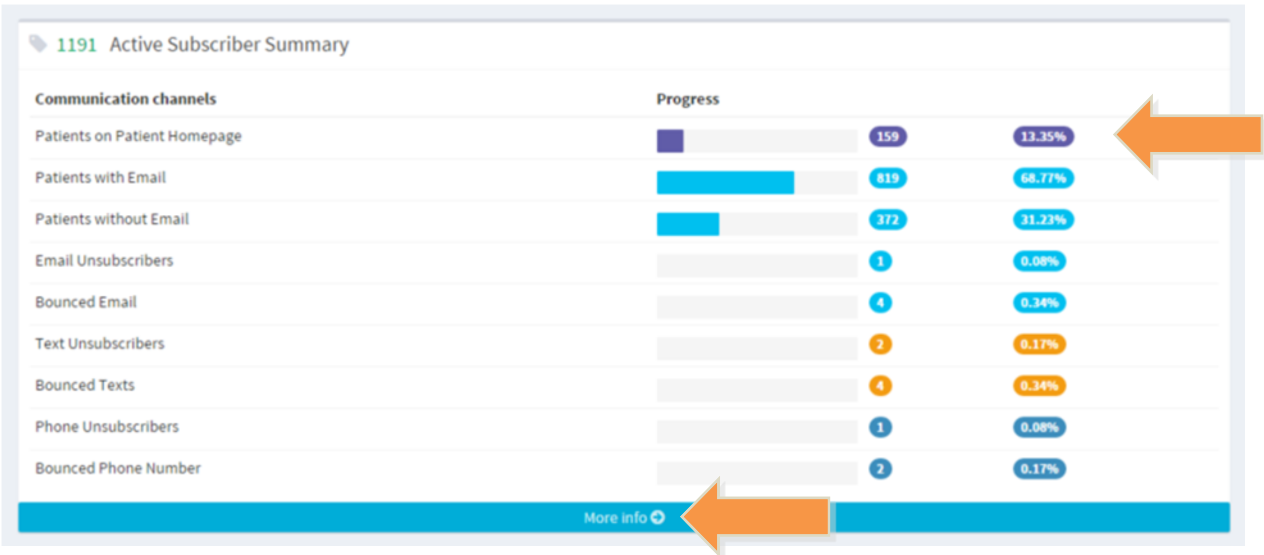
3. To see the detail for the Campaign statistics, click on the "More info" link near the bottom of the window

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

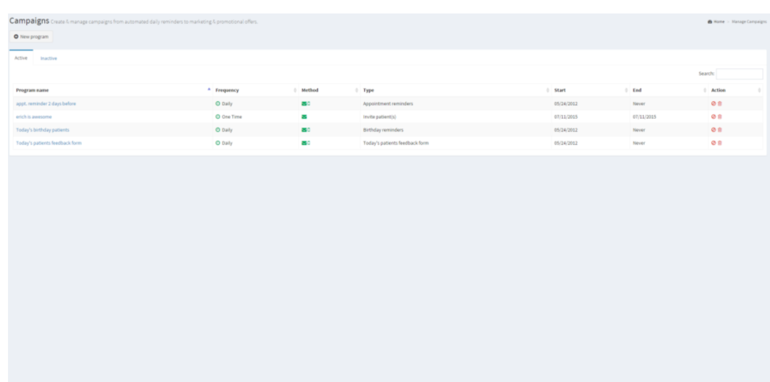
1. This graphic measures the counts and percentages of how your patients are currently engaging with you via **Patient**HomePage™ through the three communication channels (email, text, and voice)



2. It will also measure your progress in getting your patients actively connected to you using the program

3. To see the detail for the progress, count, and percentages, click on “More info” link

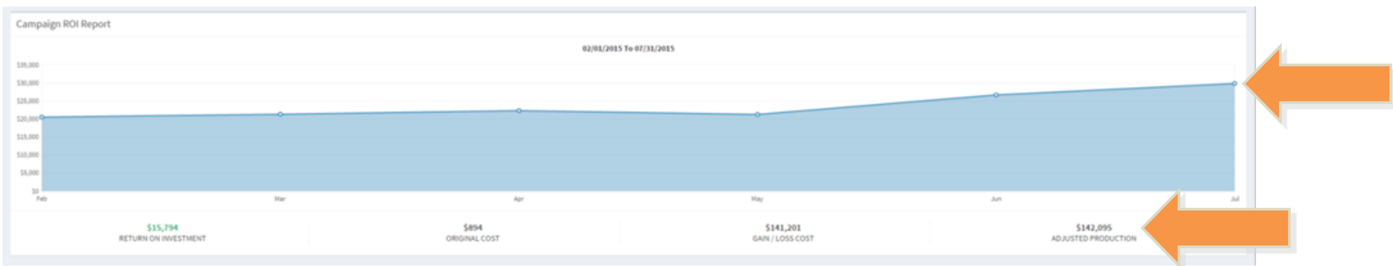
4. This will open the Campaigns screen, showing you the Active campaigns currently running in **Patient**HomePage™ with links to each Active campaign, and also a tab to view your Inactive campaigns



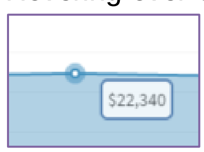
G. Campaign ROI Report

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



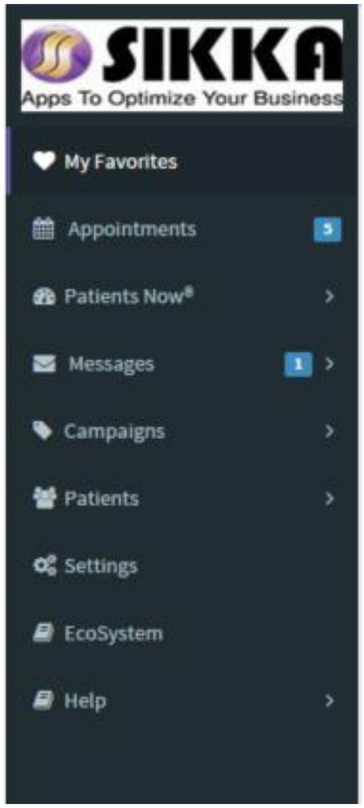
2. Hovering over each point will display the actual values



3. It will also display the totals since you began your **Patient**HomePage™ license for Return On Investment, Original Cost, Gain/Loss Cost, and Adjusted Production

H. Navigation Menu

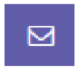
1. The navigation menu on the left side is where you will navigate to all the features, modules, and settings within **Patient**HomePage™
   Note: For more info on using the navigation menu please go to Section 4



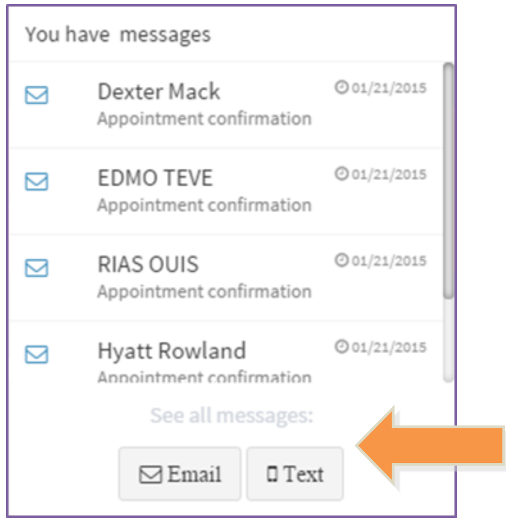
I. Navigation Icon

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

J. Inbox Icon

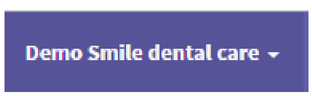


1. Clicking on this icon will display your newest four messages received from patients



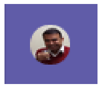
2. You will also have buttons to See all messages, and view your email and text inboxes

K. Practice Selection

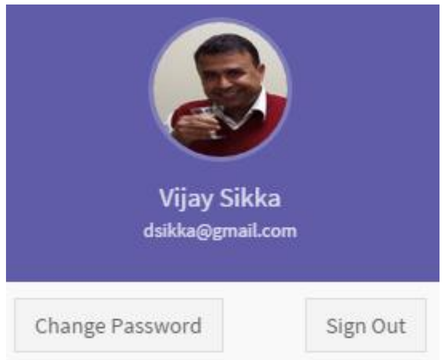


1. Shows the name of your practice/location that you're currently signed into

L. Account Icon



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

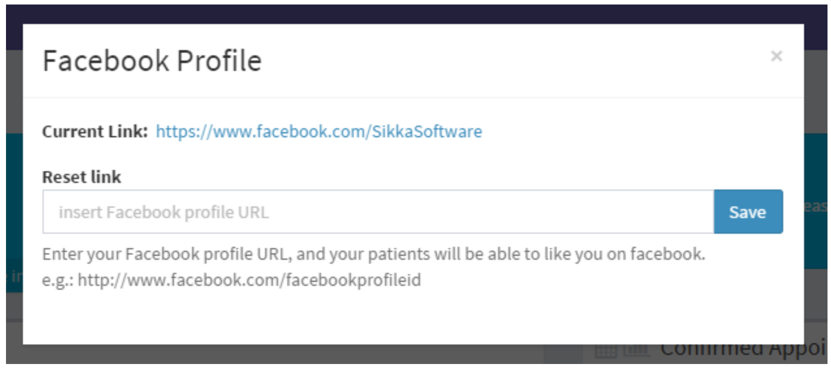


2. Change Password button will allow you to update your password for signing in

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 will be for your practice's Google Plus page

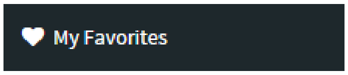
4. Yelp will be for your practice's Yelp page

5. Online Payment will allow you to set up an online Pay Pal account, giving your patients the ability to pay their balances to you via their **Patient**HomePage™ account
   Note: You must have an online payment account (i.e. Pay Pal) set up in order to use this feature. Payments will not automatically be posted in your practice management software

6. 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. Appointments

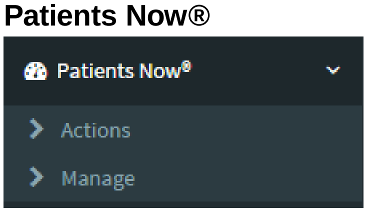
i. Indicator showing how many appointments are listed for today for quick reference

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

c. Patients Now®

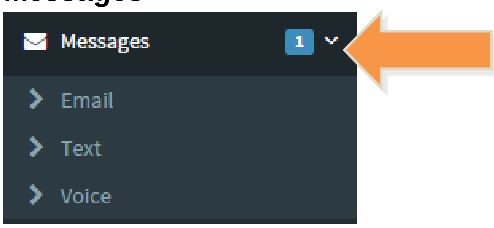


i. This scheduling assist “app within the app” is a powerful tool that will identify your high potential revenue opportunities, and instantly find patients to fill holes in your schedule

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

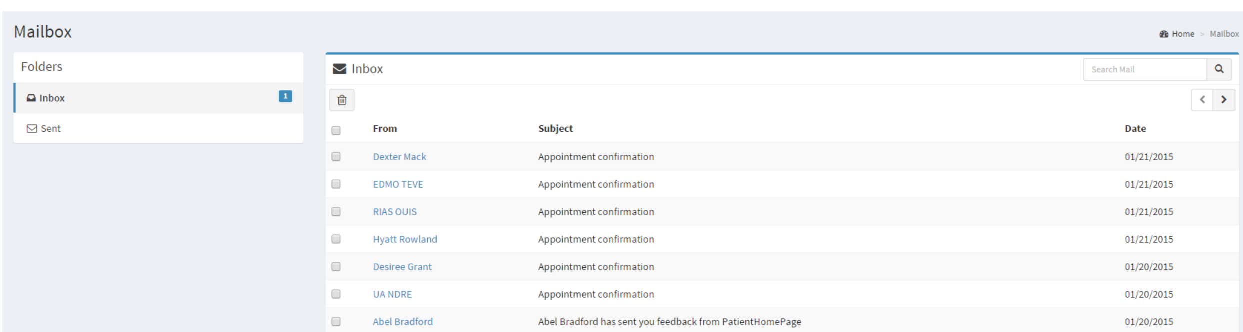
ii. Manage selection will open a screen enabling you to view your active and inactive Patients Now® campaigns, and view some key stats about each campaign
Note: To find out more about Patients Now® right now go to Section 5

d. Messages

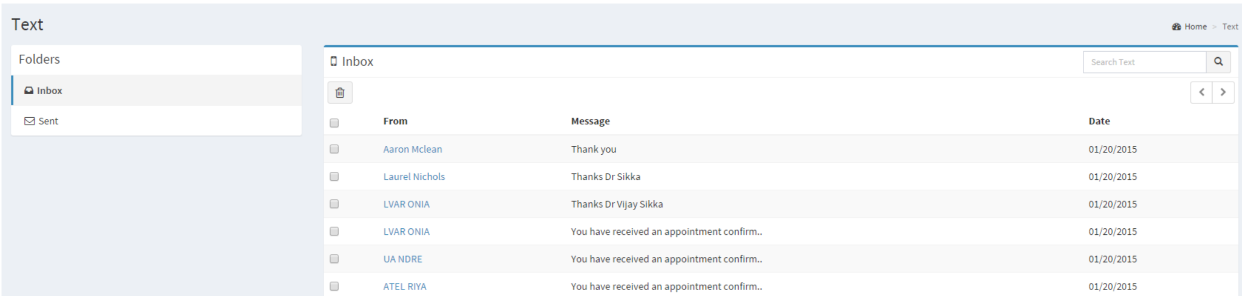


i. The blue indicator will display how many messages are currently new/unread in your inboxes

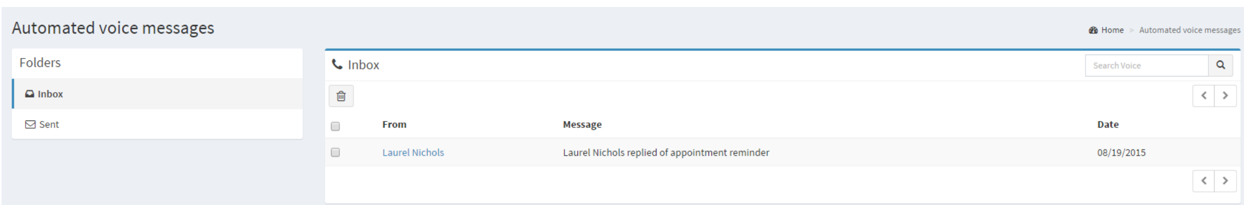
ii. Email selection will open your inbox, having tabs for both received and sent messages from and to patients via **Patient**HomePage™



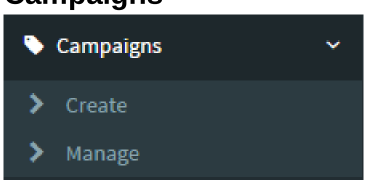
iii. Text selection will open your inbox, having tabs for both received and sent messages from and to patients via **Pateint**HomePage™ campaigns



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



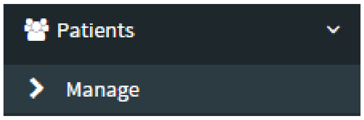
e. Campaigns



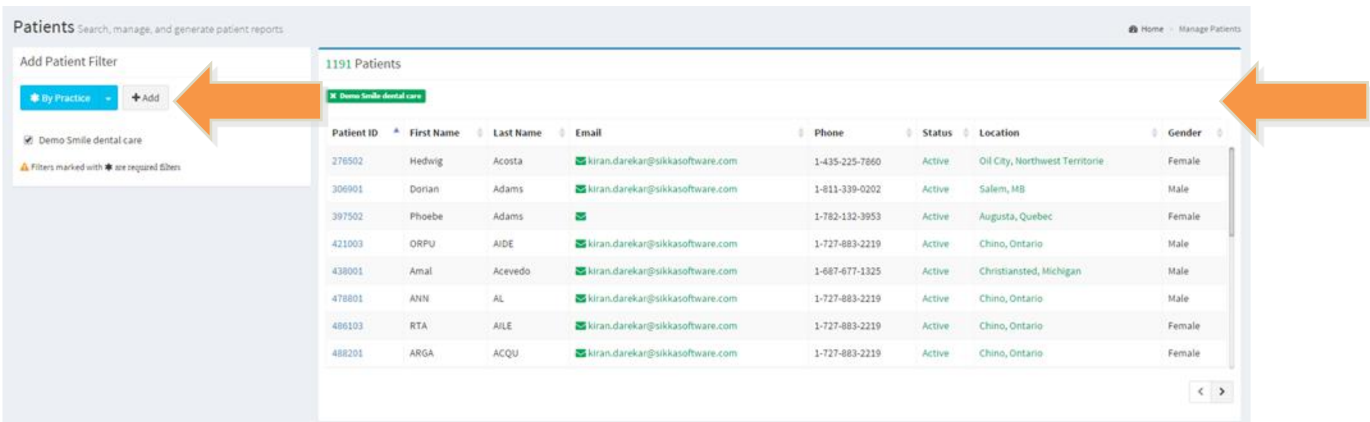
i. Create selection opens the Create a campaign self-guided wizard to get you started using your **Patient**HomePage™ account

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

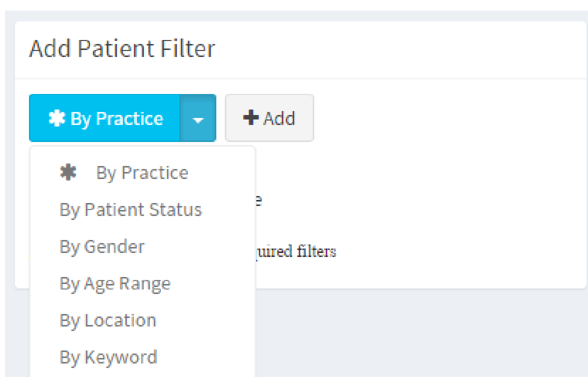
f. Patients



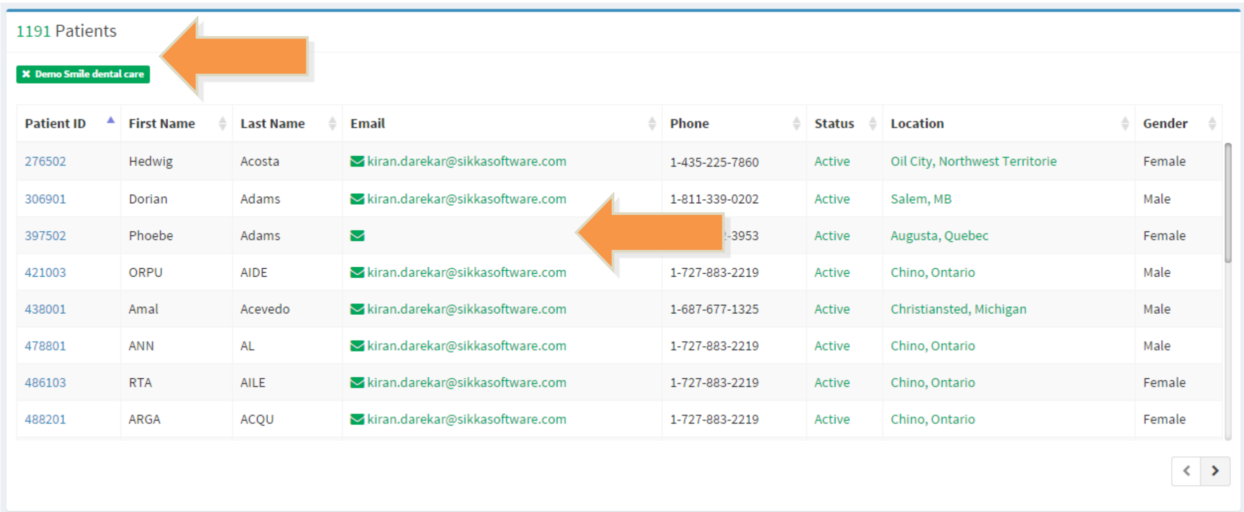
i. Manage selection will open the Patients screen allowing you to search for patients, manage patient info, and generate patient reports using filters



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



ii. The patient view will display the results after filtering



Patient ID	First Name	Last Name	Email	Phone	Status	Location	Gender
276502	Hedwig	Acosta	kiran.darekar@sikkasoftware.com	1-435-225-7860	Active	Oil City, Northwest Territorie	Female
306901	Dorian	Adams	kiran.darekar@sikkasoftware.com	1-811-339-0202	Active	Salem, MB	Male
397502	Phoebe	Adams		-3953	Active	Augusta, Quebec	Female
421003	ORPU	AIDE	kiran.darekar@sikkasoftware.com	1-727-883-2219	Active	Chino, Ontario	Male
438001	Amal	Acevedo	kiran.darekar@sikkasoftware.com	1-687-677-1325	Active	Christiansted, Michigan	Male
478801	ANN	AL	kiran.darekar@sikkasoftware.com	1-727-883-2219	Active	Chino, Ontario	Male
486103	RTA	AILE	kiran.darekar@sikkasoftware.com	1-727-883-2219	Active	Chino, Ontario	Female
488201	ARGA	ACQU	kiran.darekar@sikkasoftware.com	1-727-883-2219	Active	Chino, Ontario	Female

i. It will show the total number of patients in the list

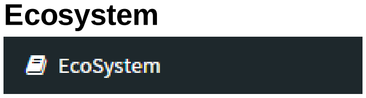
ii. It will show the active filters (which can be removed by simply clicking on the “x” in the green box)

iii. It will show the pertinent patient info such as: email address and phone number

g. Settings

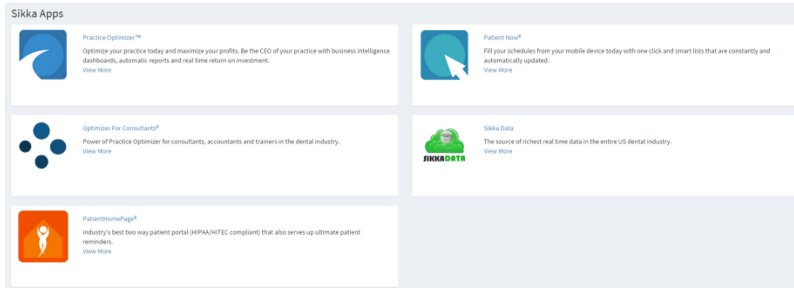
i. All of the tools you need to set up your PatientHomePage™ account, add users, manage appointment requests, patient portals, set up automated reports, using widgets, and other features
Note: To find out more about Settings right now go to Section 7

h. Ecosystem

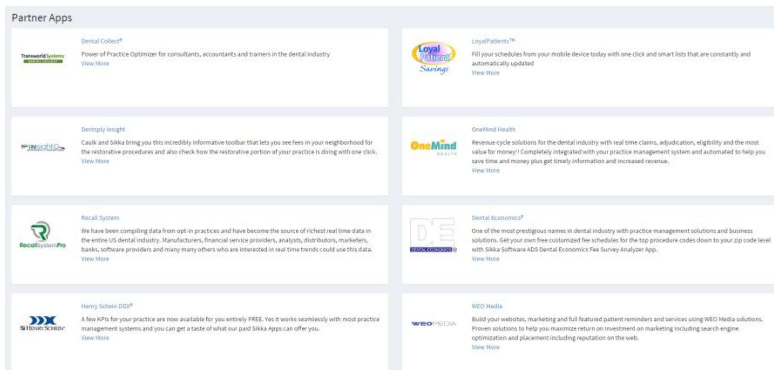


i. This selection will open a page with info on all of our EcoSystem Apps

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

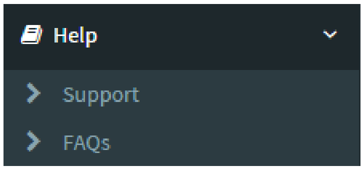


ii. Partner Apps are all of the apps that were developed or co-developed by Sikka and our partners using our platform

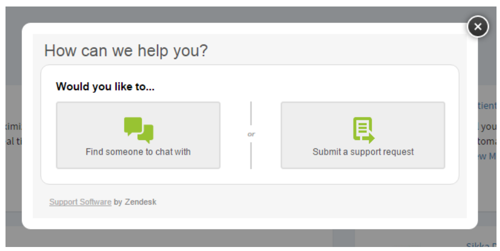


Note: All of these apps run off of the one Sikka Platform Cloud platform, and integrate with most practice management software

i. 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

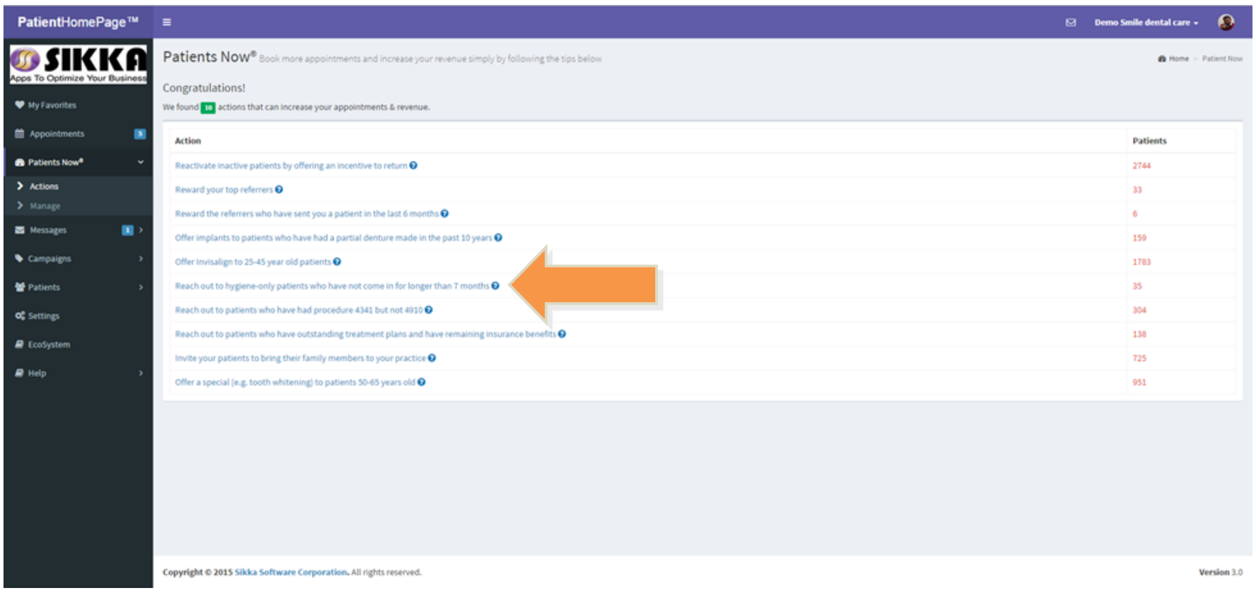


ii. FAQs selection opens the FAQ page with much of the basic information about **Patient**HomePage™

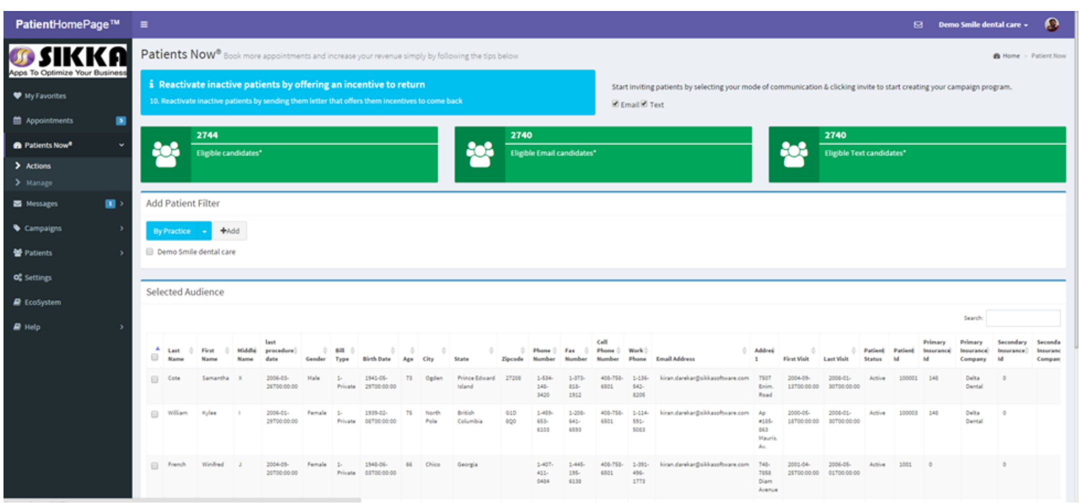
5. Using The Patients Now® Scheduling App

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

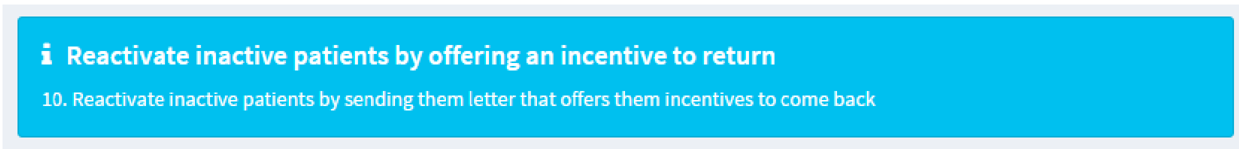
i. Currently it will show you ten patient list categories, and how many patients in your PMS meet the criteria on the right



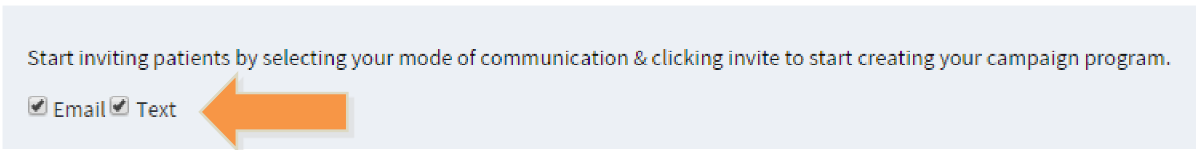
ii. Clicking on one of these patient list categories will open the Patients Now® campaign screen



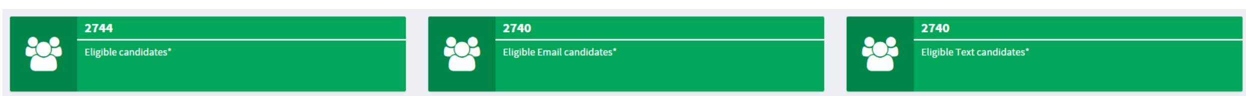
i. The Patients Now® campaign screen will display the patient list category you have selected in the blue box



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

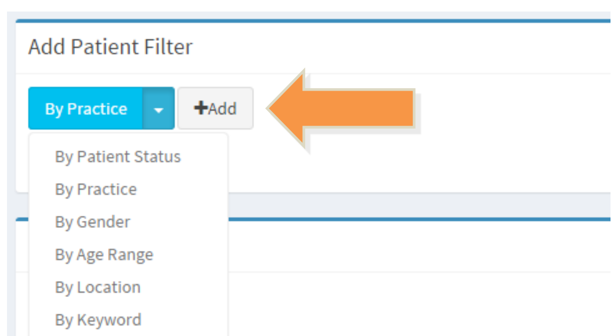


iii. The green boxes will show you key statistics on total Eligible candidates (patients), Eligible email candidates (patients with an email address in your practice management software), Eligible text candidates (patients with a mobile phone number in your practice management software)

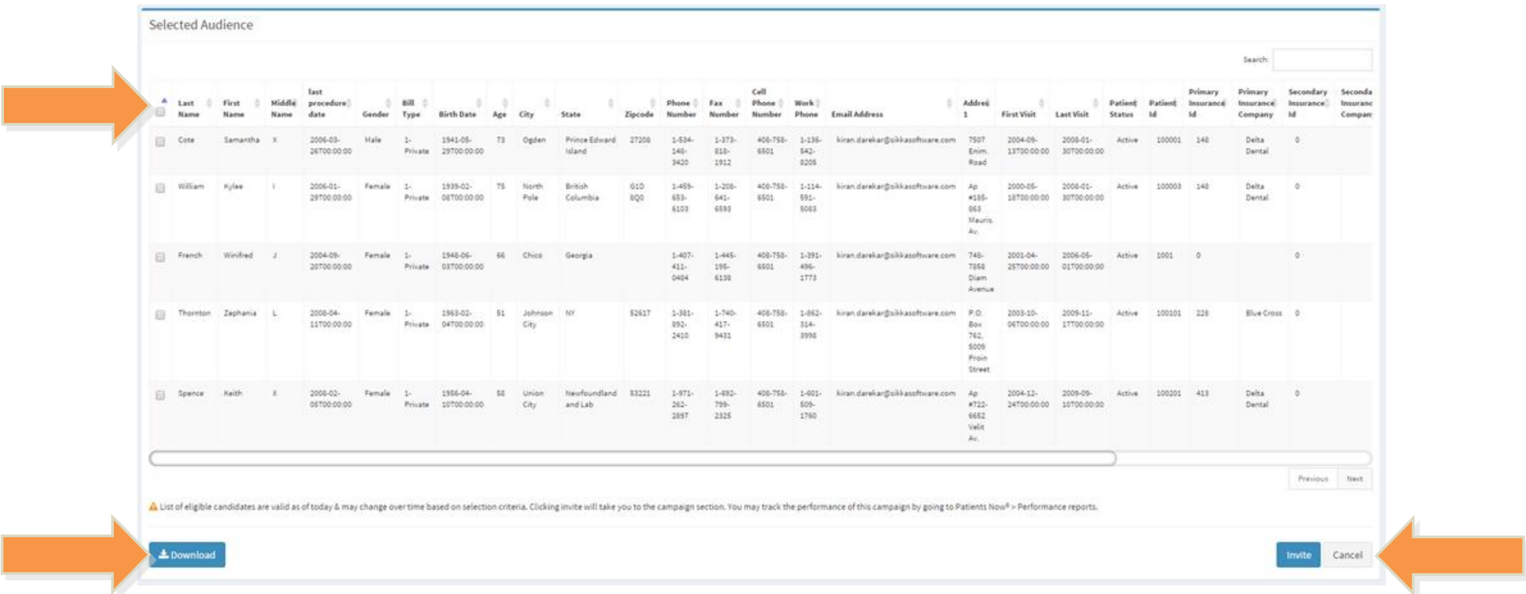


Note: Lists of eligible candidates are valid as of the current today and may change over time based on selection criteria.

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, Location, and Keyword



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



i. You can search for certain patients using the search box to the right

ii. 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

iii. You can sort the results by clicking on the heading for each column you want to sort by

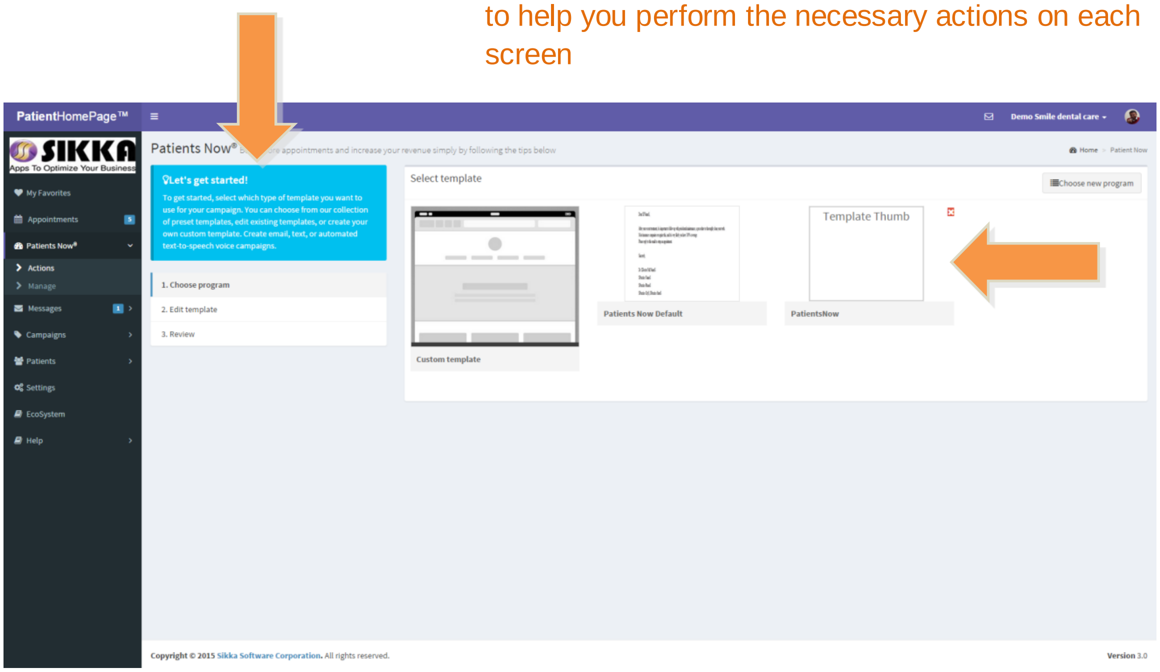
iv. You can page through all of the patients details in the Selected Audience screen by clicking the Next and Previous buttons in the lower right

v. You can download the entire Selected Audience patient details report as an .csv by clicking on the blue Download button near the bottom left

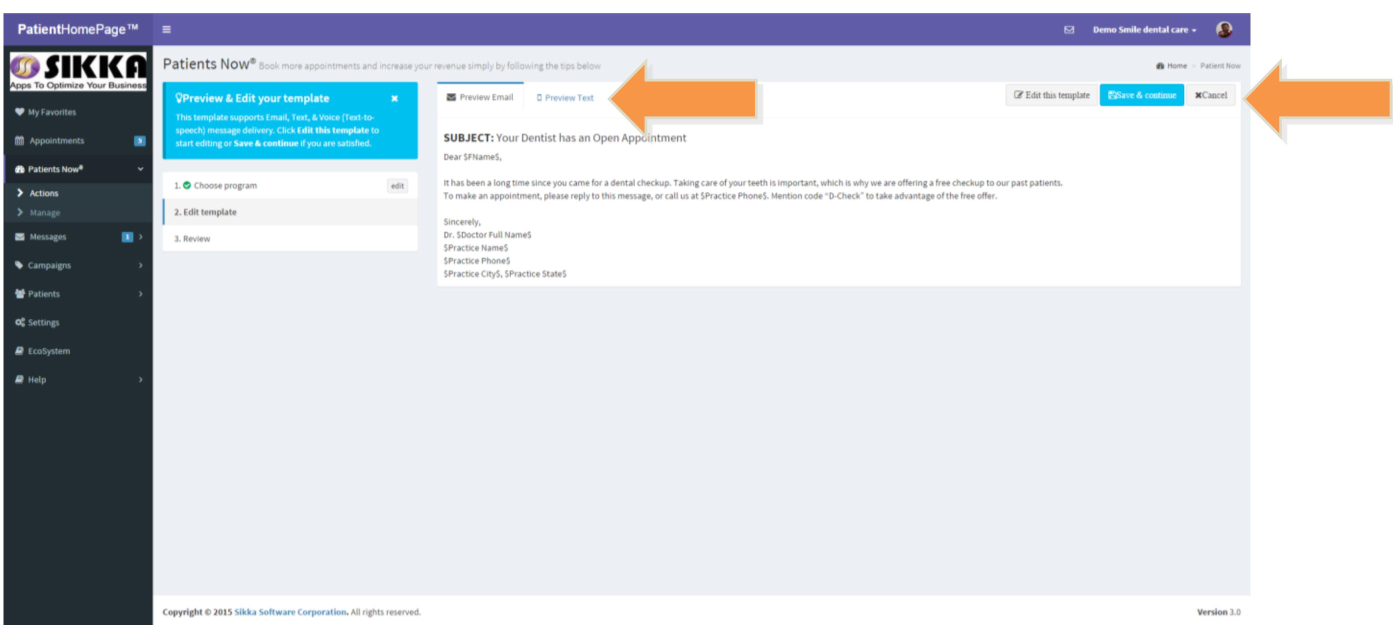
vi. Clicking the Cancel button will take you back to the Action screen with the menu of patient list categories

vii. 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



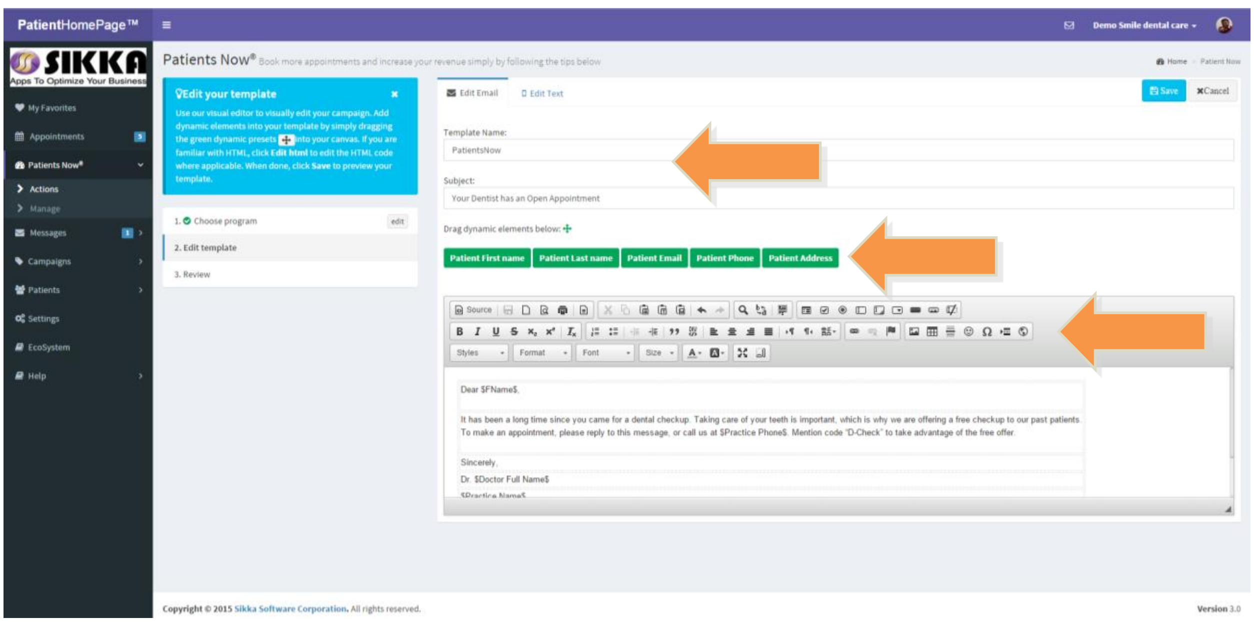
b. Second step will be for you to edit the template for both the email and the text message
Note: You do not have to edit the template if you are satisfied with the template you've selected



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



a. Template Name is where you can enter the name of your template

b. Subject is where you can enter the subject line of the email that your patients will be receiving

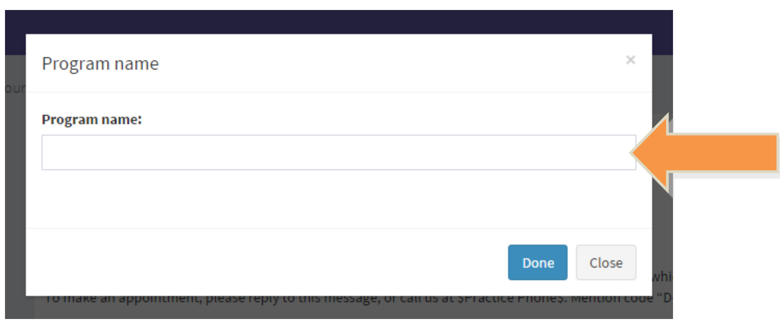
c. The green dynamic elements you can drag and drop into the body of your email/text, which will automatically display that particular patient info from your practice management software

d. You can edit any of the body of your email by using the editor tool bar

e. Cancel button will take you back to the Edit template screen (Second Step)

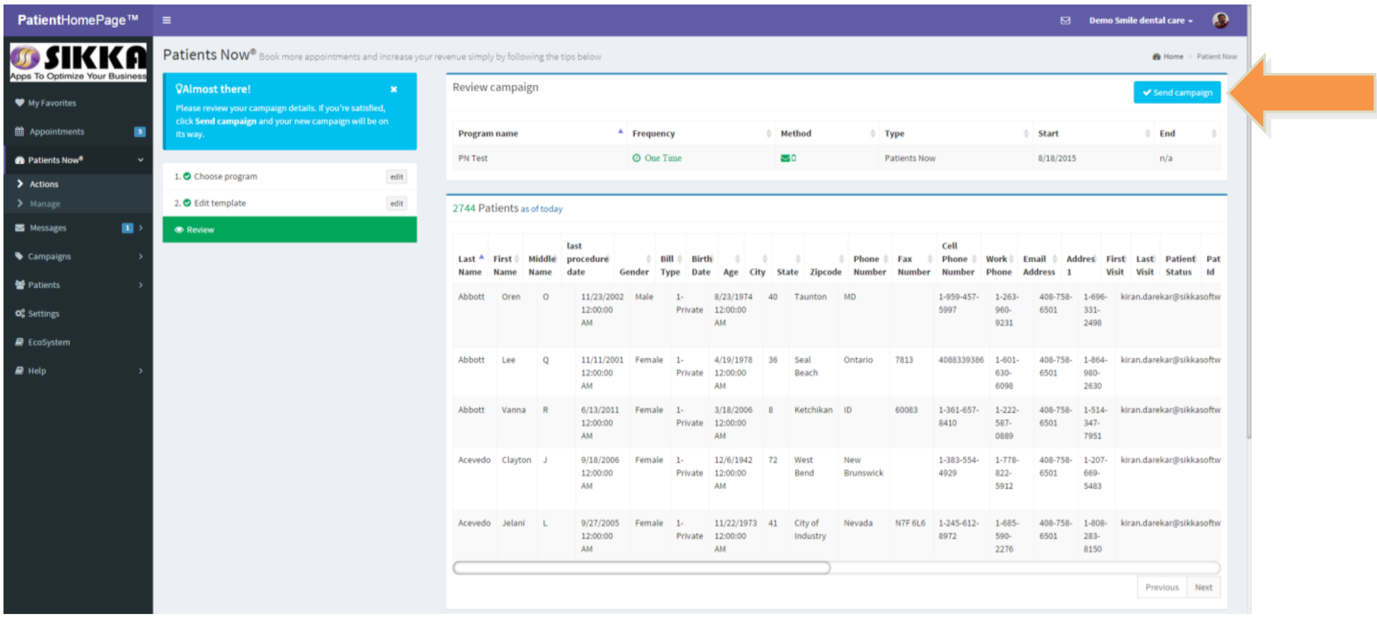
f. Save button will take you back to the Patients Now® Edit Email / Edit Text screen (Second Step)

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

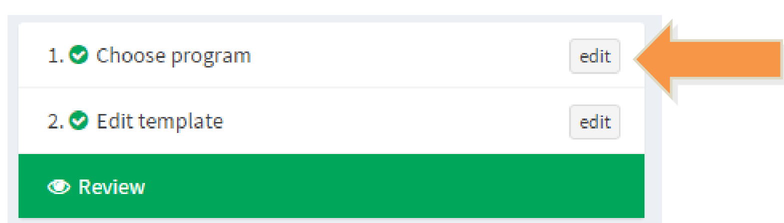


1. Review Campaign will show the name, frequency, send method, type, start date, and end date (if applicable)

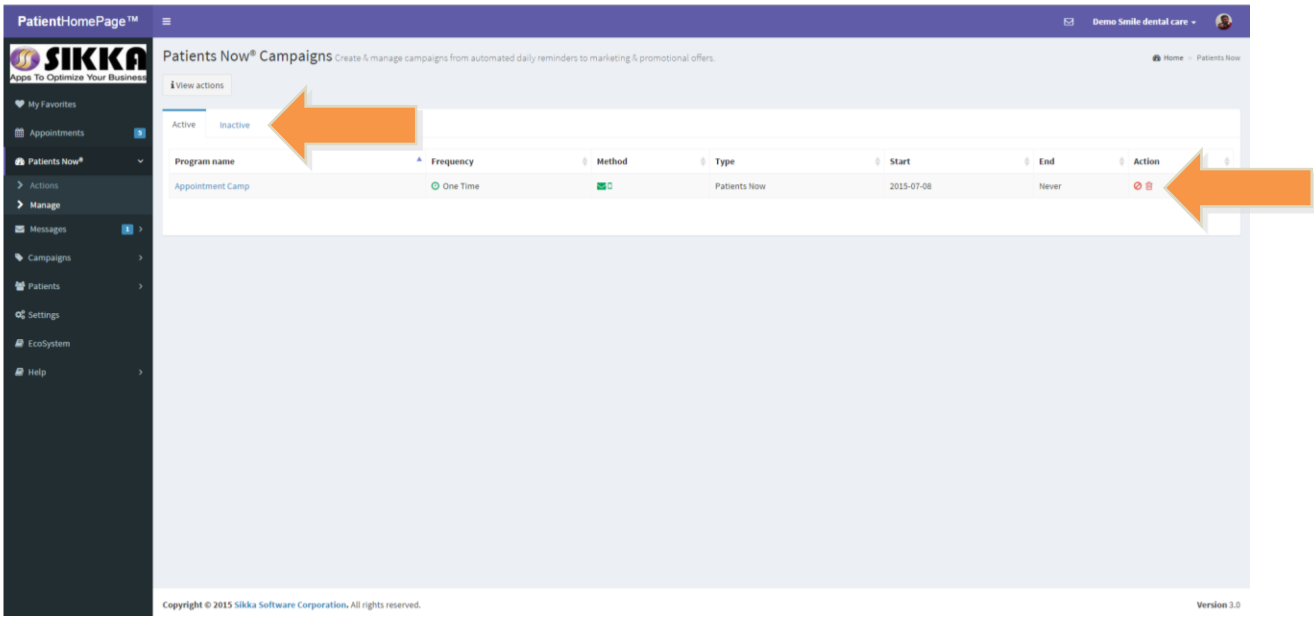
2. You can once again review the patients in your send list

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

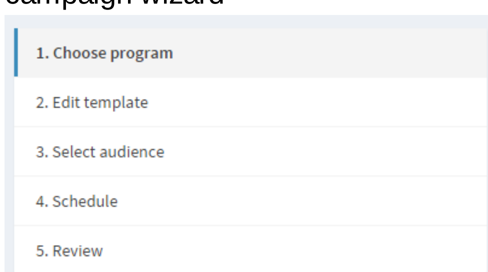
iii. Clicking the "View Actions" button will take you back to the Actions screen and the patient list categories

6. Using The PatientHomePage™ Campaigns

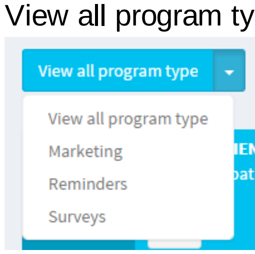
Note: You can get to Campaigns by clicking on the Campaigns link in the navigation menu on the left of the screen

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

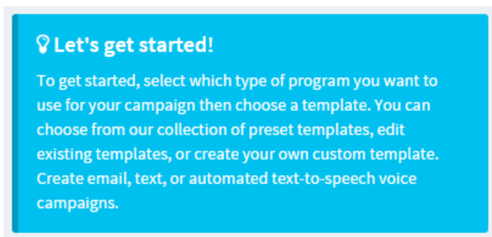


ii. View all program type will filter the program selection list by type

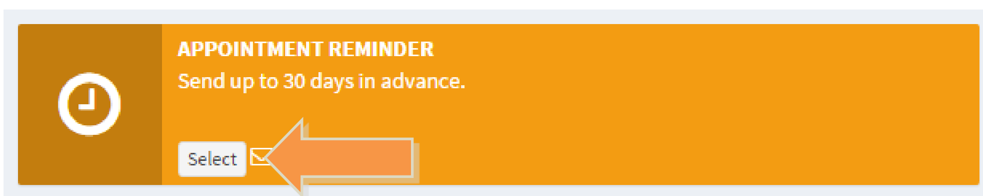


iii. The program type boxes will display the name of each program, a description, how it can be sent to patients, what type it is, and a button to select it
    i. Marketing = Blue
    ii. Reminders = Yellow
    iii. Surveys = Green

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

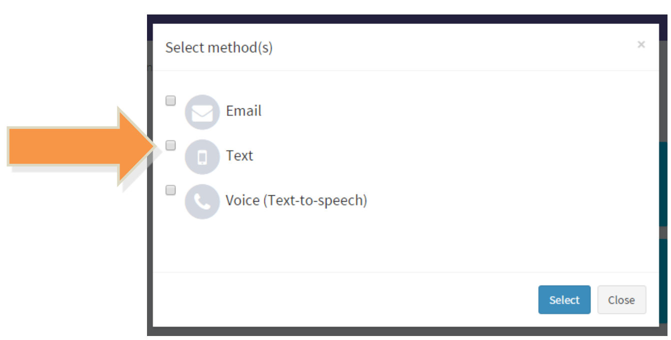


iv. Step 1: Choose program by clicking the Select button in one of the programs listed on the right side of the page

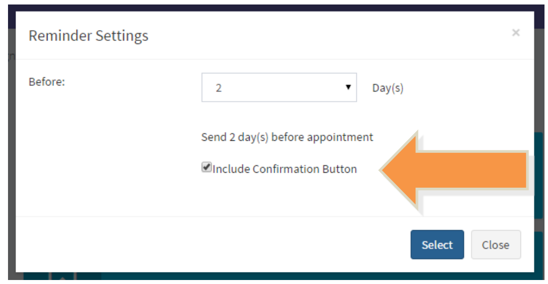


i. Clicking the Select button will open a new selection wizard

a. The first screen will ask you to choose Email, Text or Voice – then click the Select button to advance

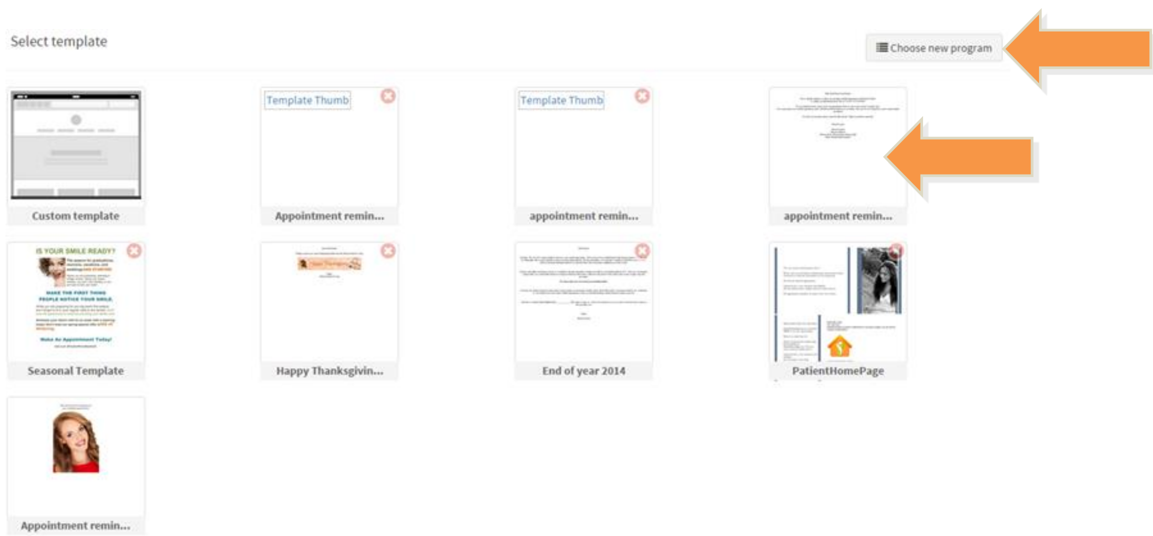


b. The second screen will ask you to choose how many days before/after the appointment you would like to send the email/text/voice – then click the Select button to advance



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

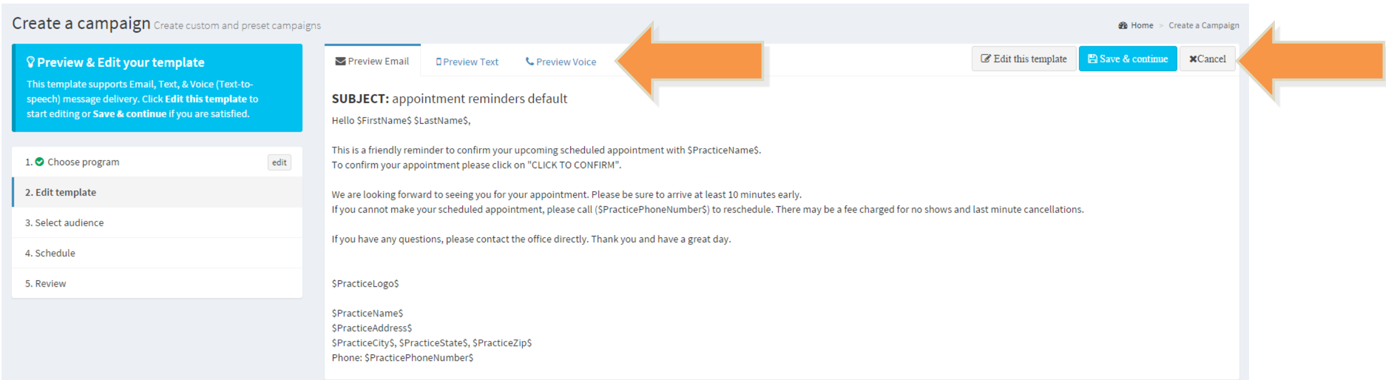


1. Select one of the templates to begin editing

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)



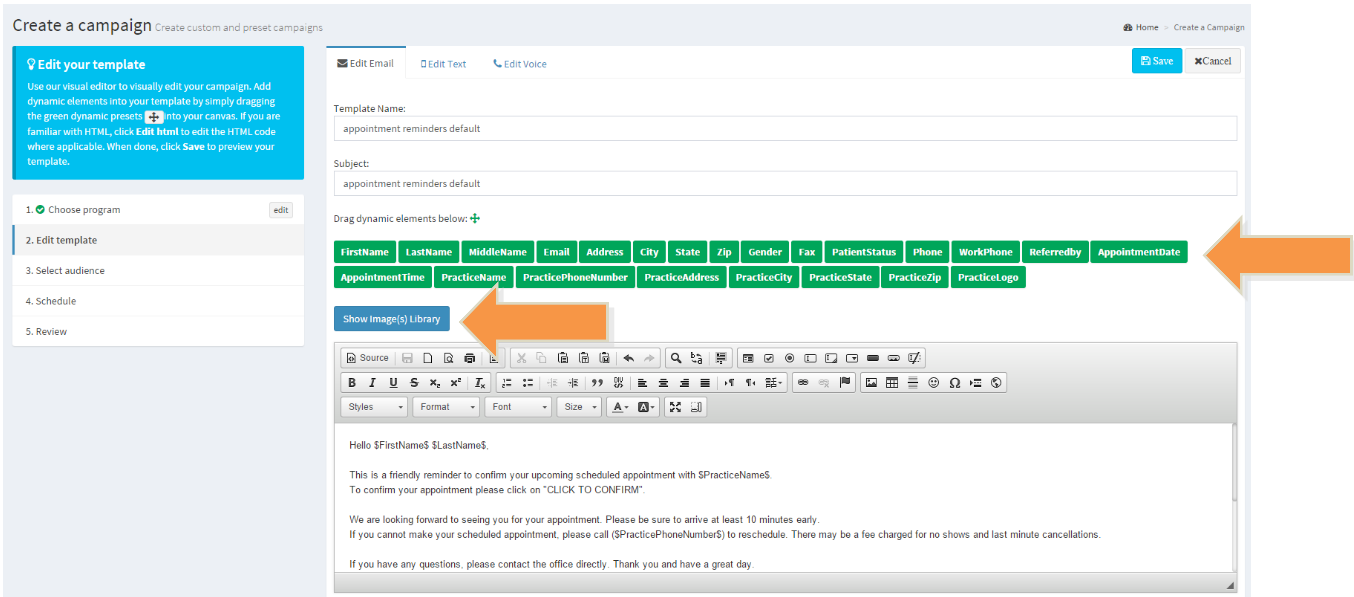
Note: You do not have to edit the template, if you are satisfied with the template you've selected click Save & Continue to proceed

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

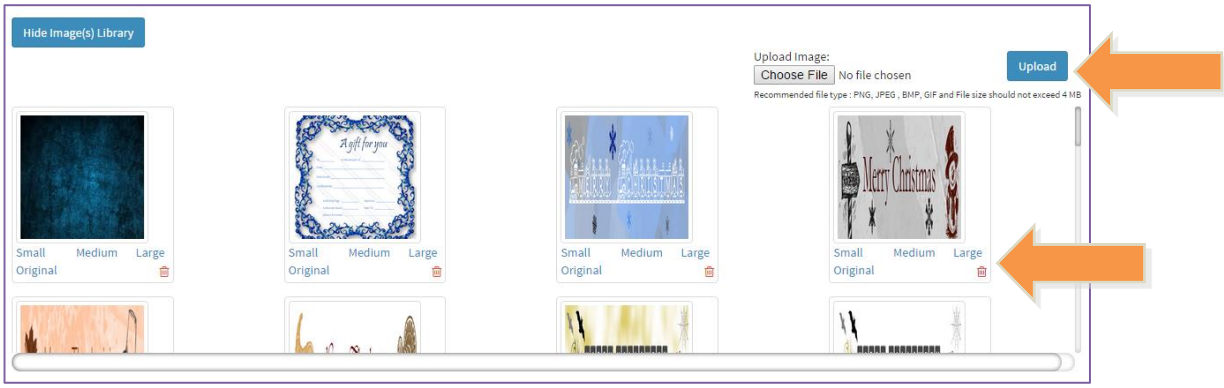


1. Template Name is where you can enter the name of your template
   Note: This name will display on the Select template screen after saving

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

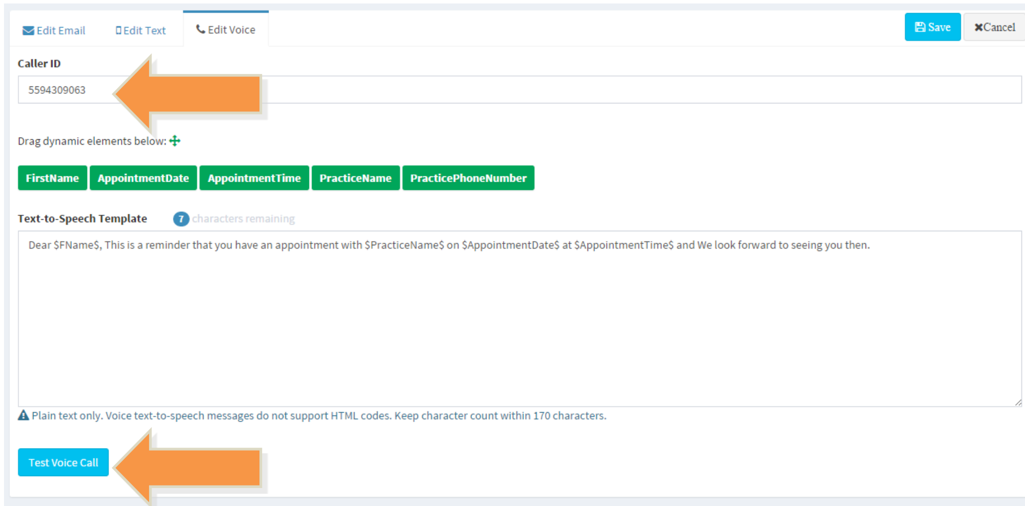
c. You can delete an image from the library by clicking on the trash icon

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

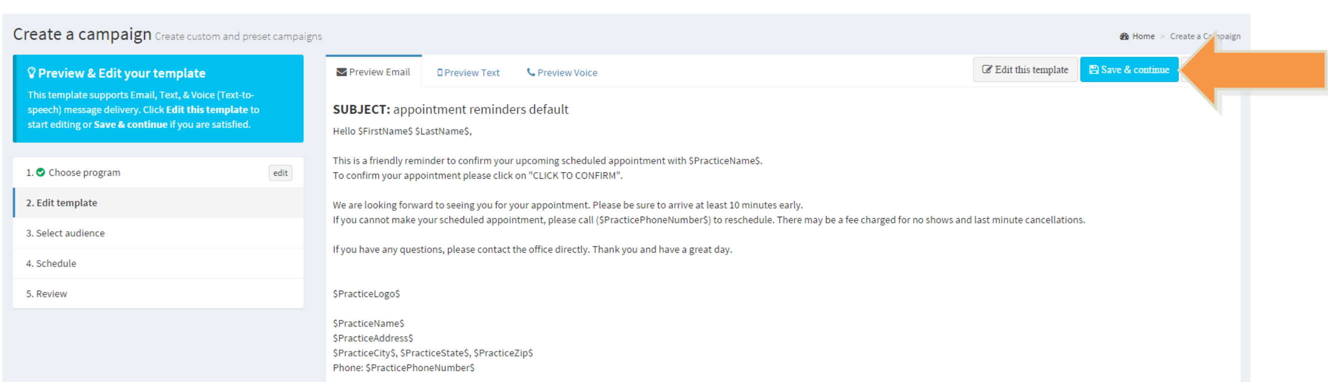


7. Test Voice Call will call the phone number you enter, so you can hear how the reminder will sound to your patients

8. Cancel button will take you back to Step 2: Edit template

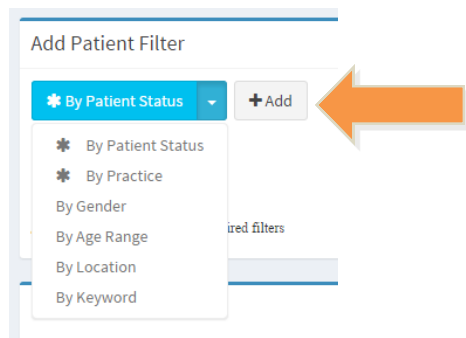
9. Save button will take you back to the Edit Email/Edit Text/Edit Voice screen

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

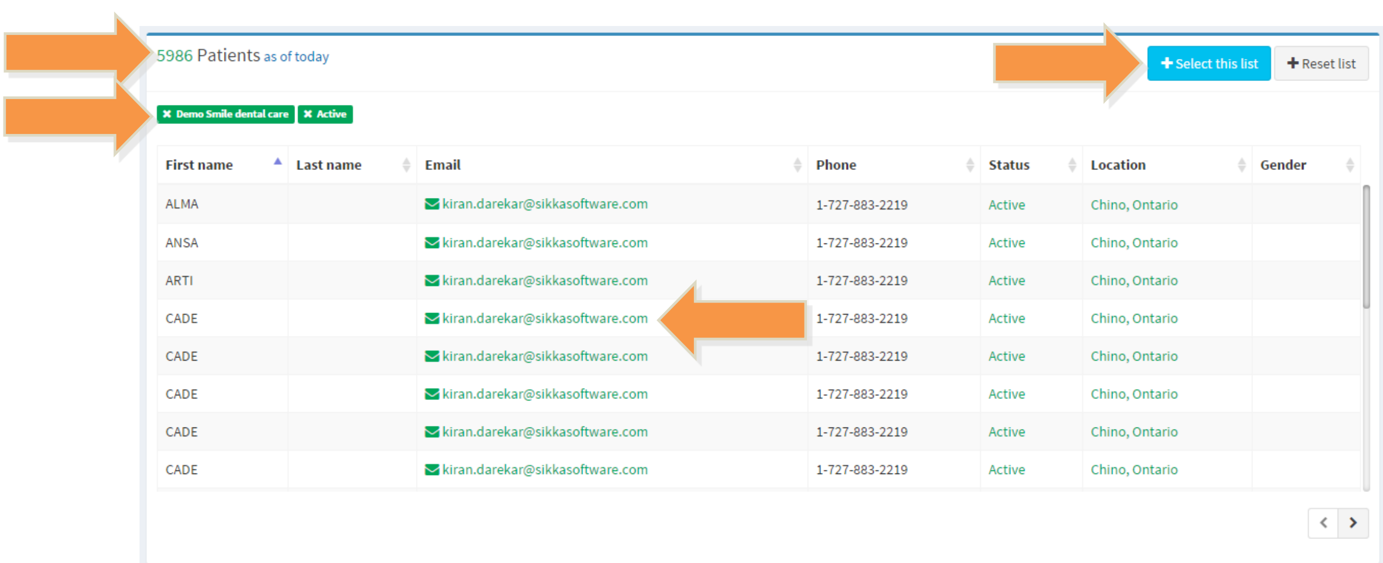


vi. Step 3: Select audience

i. 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

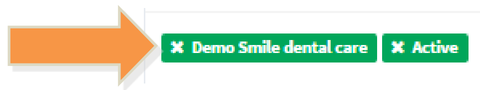


ii. The selected Patients screen will display the number of patients in the list, the active filters, and actual patient email and phone info



First name	Last name	Email	Phone	Status	Location	Gender
ALMA		kiran.darekar@sikkasoftware.com	1-727-883-2219	Active	Chino, Ontario	
ANSA		kiran.darekar@sikkasoftware.com	1-727-883-2219	Active	Chino, Ontario	
ARTI		kiran.darekar@sikkasoftware.com	1-727-883-2219	Active	Chino, Ontario	
CADE		kiran.darekar@sikkasoftware.com	1-727-883-2219	Active	Chino, Ontario	
CADE		kiran.darekar@sikkasoftware.com	1-727-883-2219	Active	Chino, Ontario	
CADE		kiran.darekar@sikkasoftware.com	1-727-883-2219	Active	Chino, Ontario	
CADE		kiran.darekar@sikkasoftware.com	1-727-883-2219	Active	Chino, Ontario	
CADE		kiran.darekar@sikkasoftware.com	1-727-883-2219	Active	Chino, Ontario	

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

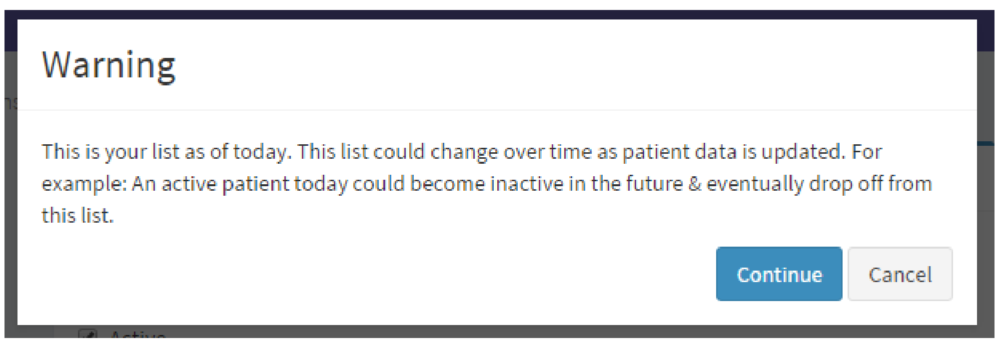


b. You can page through all of the patients in the selected Patient screen by clicking the Next and Previous buttons in the lower right

c. Clicking the Reset button will refresh the Select audience screen

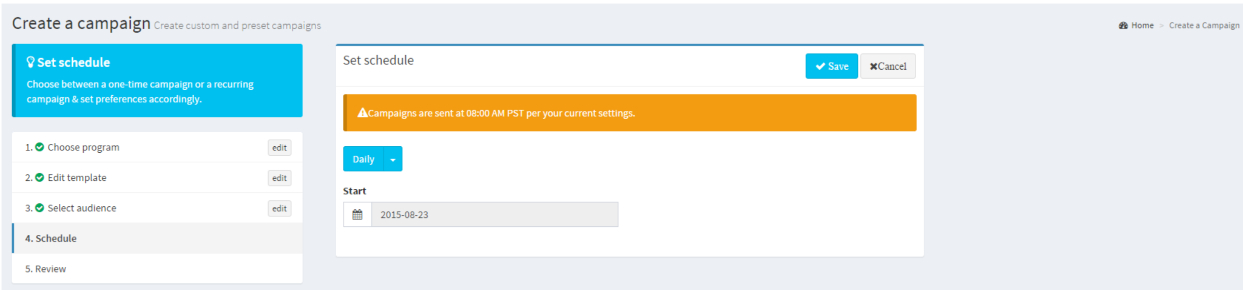
d. To advance to Step 4: Schedule click the Select this list button

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

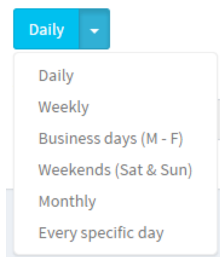


vii. Step 4: Schedule

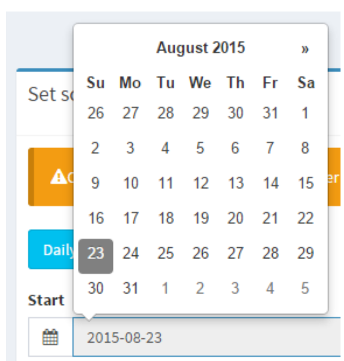
i. The Set schedule screen will allow you to determine the start date and the frequency of your campaign



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

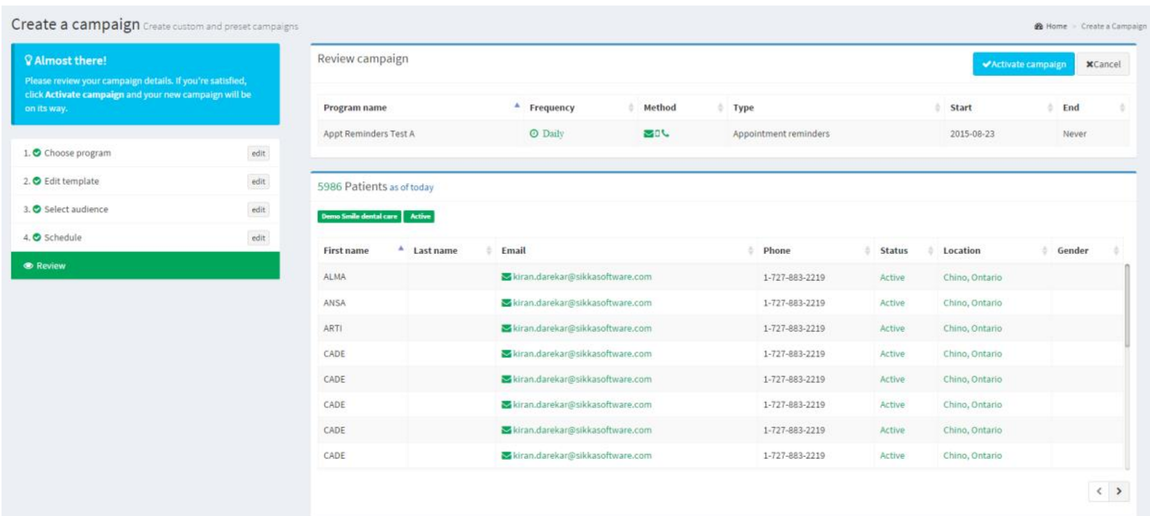
1. Clicking Save will open a window asking you to enter the Program name
Note: The program name will be saved in your Active campaign list

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 to reviewed before sending the email/text/voice to your patients

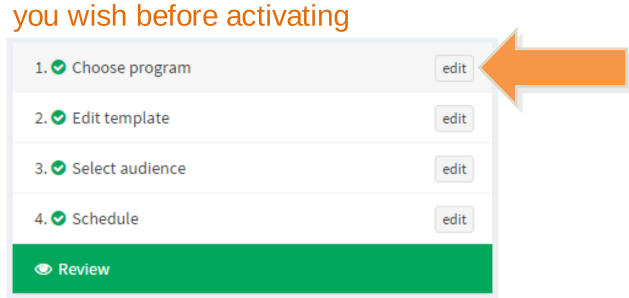
a. Review Campaign will show the name, frequency, send method, type, start date, and end date (if applicable)



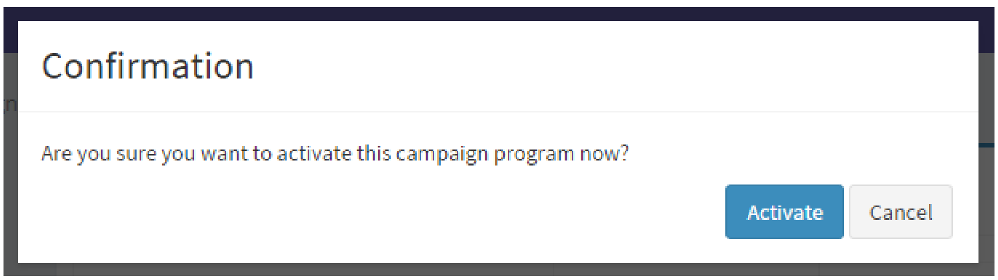
b. You can once again review the patients in your send list

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



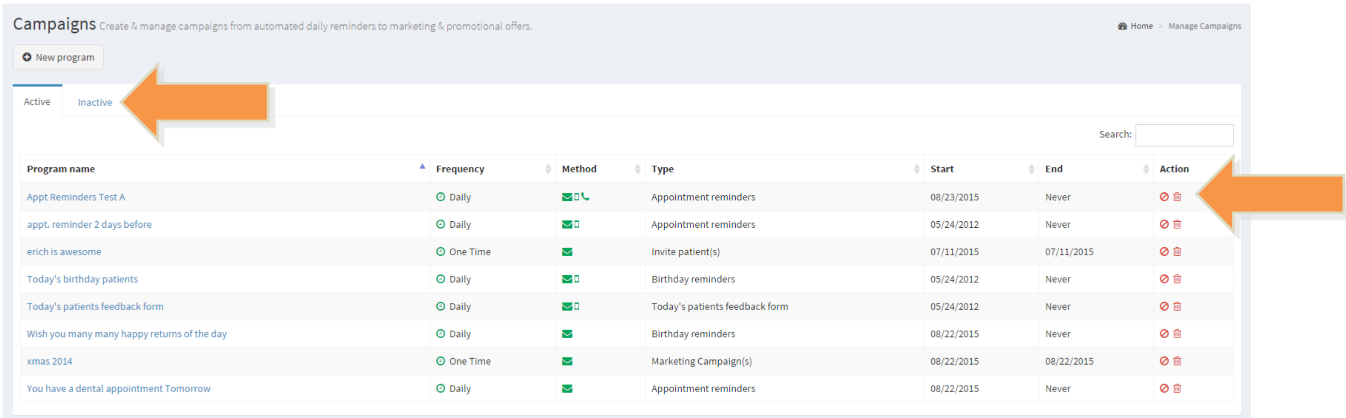
1. Click Activate to start the campaign

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



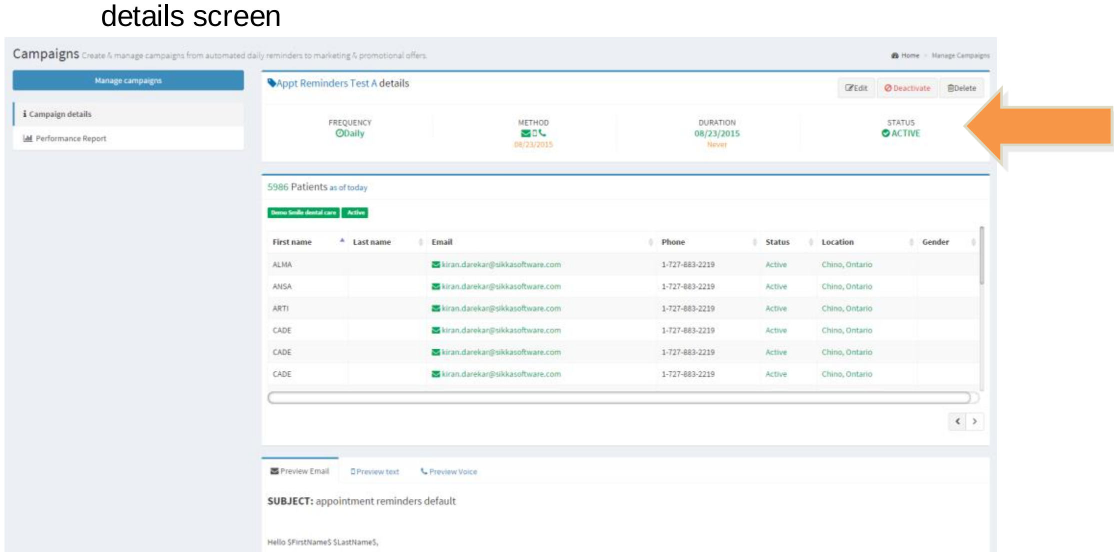
i. Active tab view will display all of your currently running campaigns

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



a. The campaign details section will display

1. Frequency (how often the campaign runs)
2. Method (hot the campaign is sent, including the last run date)
3. Duration (the campaign start date, and the end date)
4. Status (active or inactive)

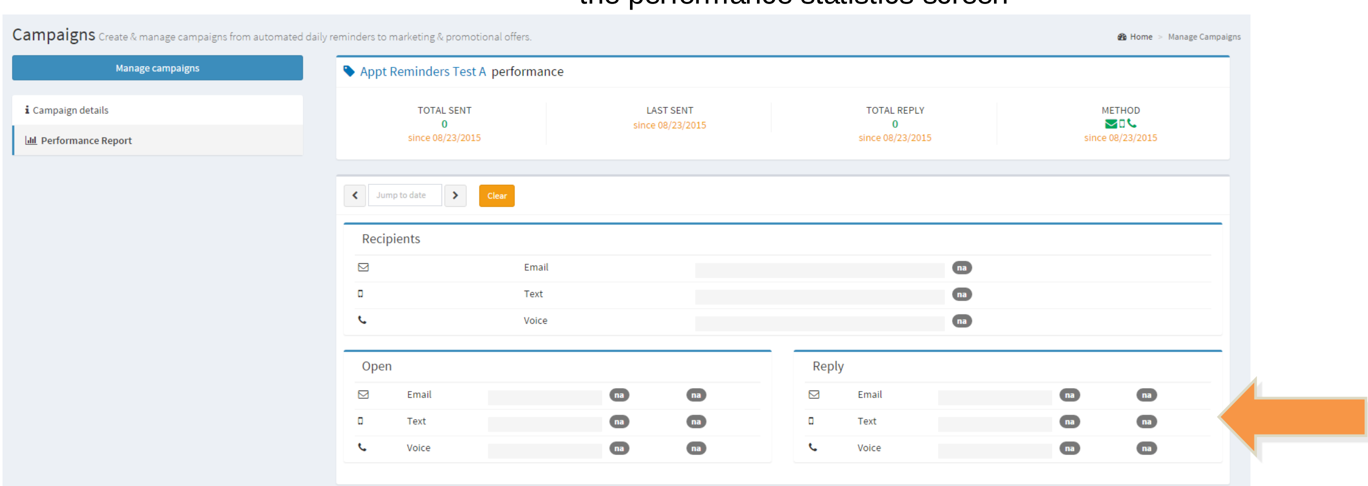
b. You can Edit, Deactivate, or Delete the campaign using the buttons in the upper right

c. You can review the selected patients in your campaign

d. You can preview the email/text/voice templates also

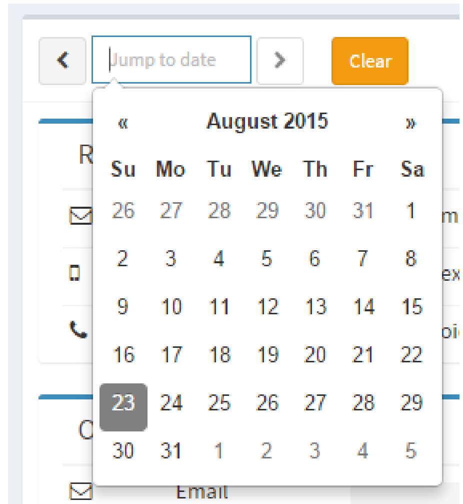
e. Clicking the Manage Campaigns button will take you back to the main Active/Inactive screen

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

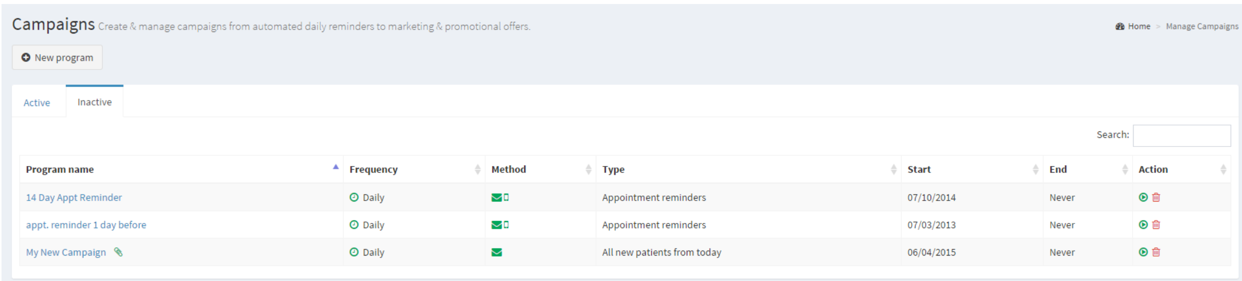
3. The metrics will display total numbers and percentages of Recipients, Open, and Reply Note: The metrics displayed will be filtered by the date selection

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



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

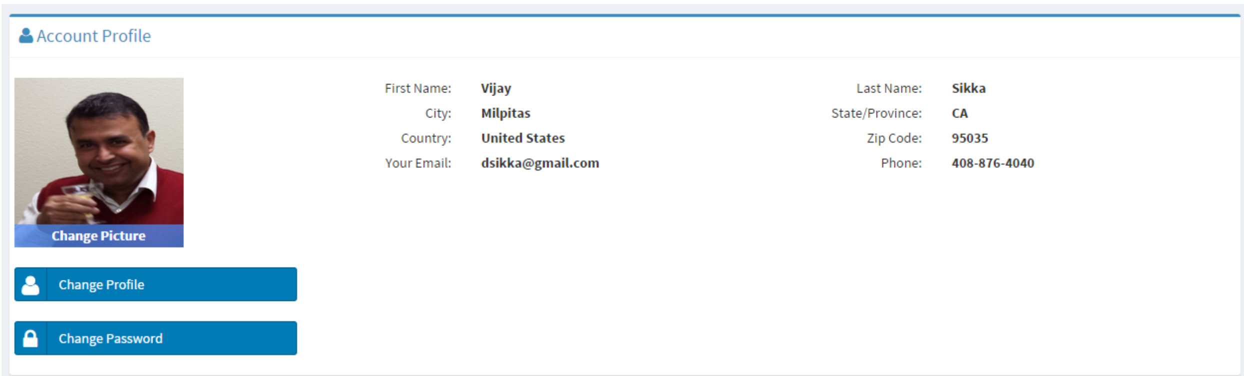
iii. Clicking the “New Program” button will take you back to the first step of the Create a campaign wizard

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

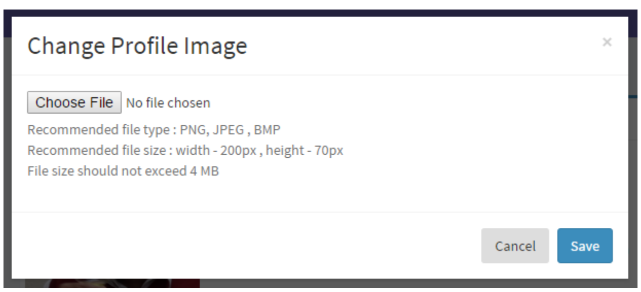
7. Setting Up Your PatientHomePage™ Account

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

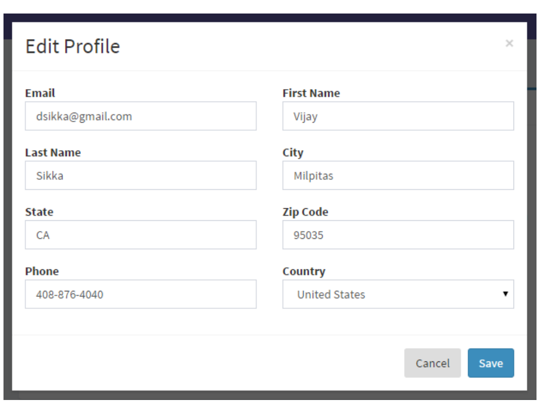
a. Account Profile



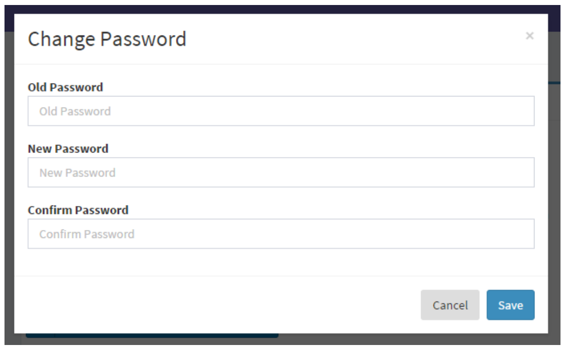
i. Clicking on "Change Picture" will allow you to setup/change your profile picture



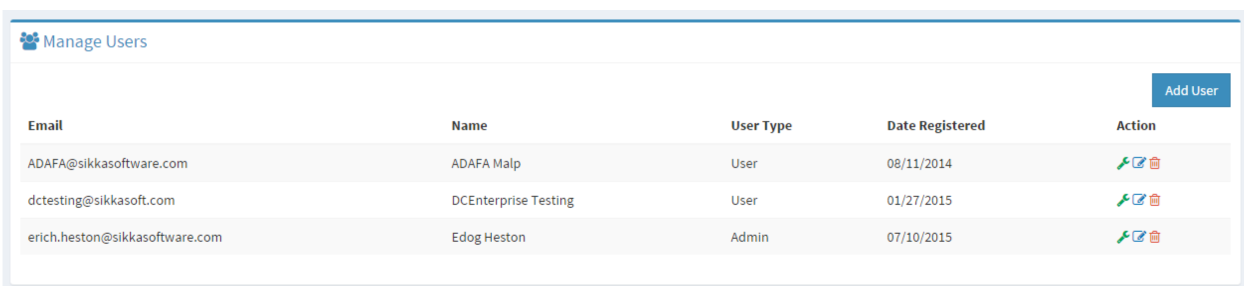
ii. Clicking on "Change Profile" will allow you to edit the info in your Acount Profile



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

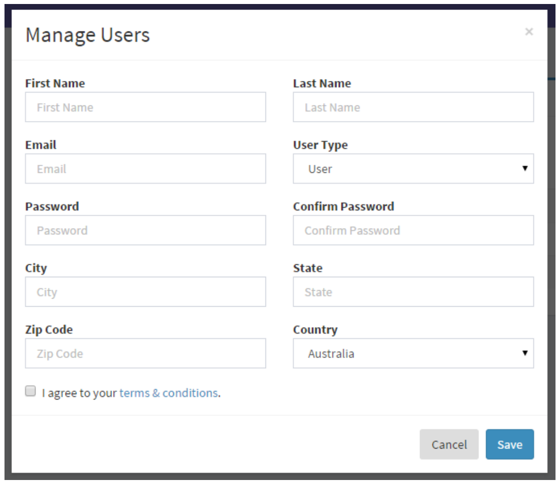


b. Manage Users



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

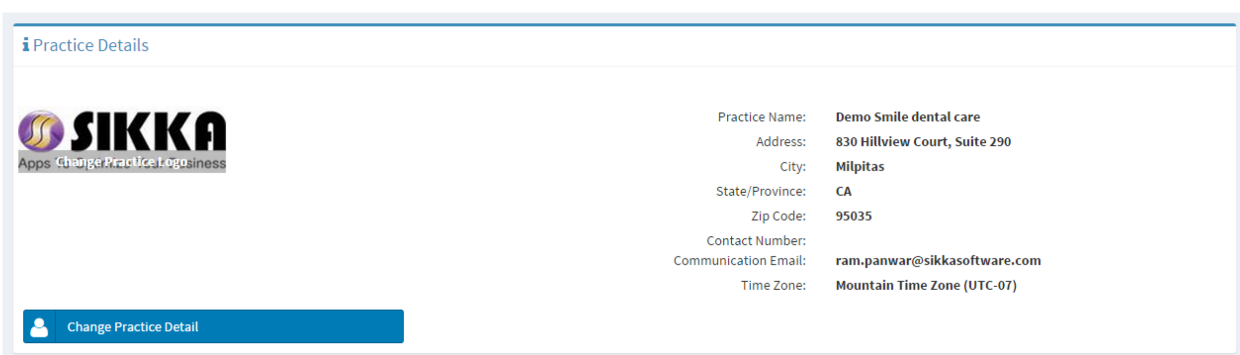


ii. Clicking "Access" under Actions will allow you to select practice level access for each user

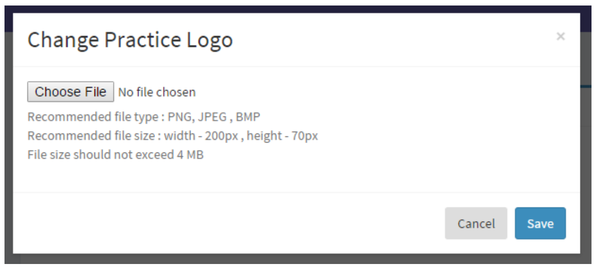
iii. Clicking "Edit" under Actions will allow you to change the info for that particular user

iv. Clicking "Remove" under Actions will delete that particular user account

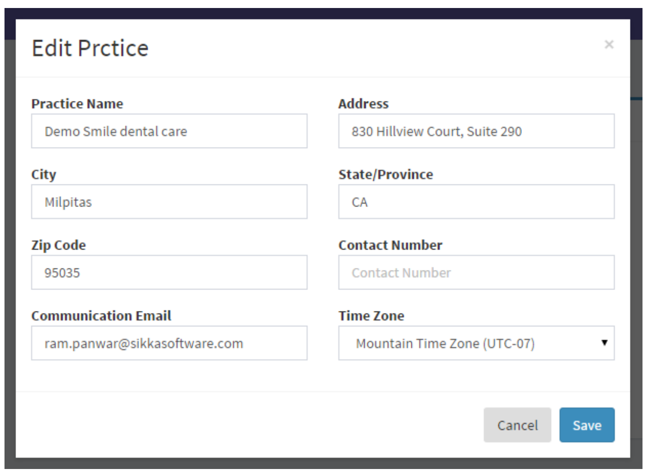
c. Practice Details



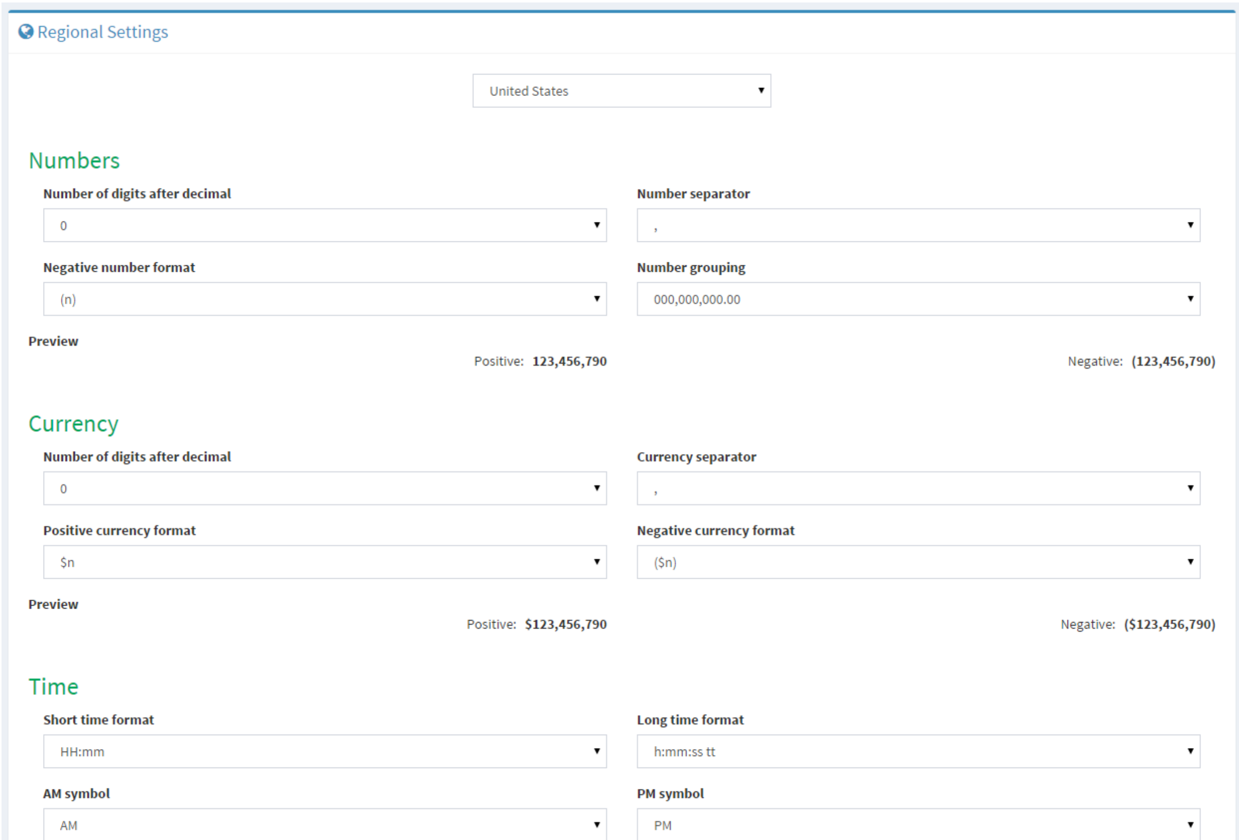
i. You can click on the logo (Change Practice Logo) to upload your own practice logo to your account
Note: The recommended logo should be PNG, JPEG, or BMP, and 200px width – 70px height, and smaller than 4MB in size
Note: You uploaded practice logo will be displayed to patients on the patient portal, and can also be added to your automated campaigns



ii. Change Practice Detail



d. Regional Settings



i. You have the option to setup your regional settings by selecting your country (region)

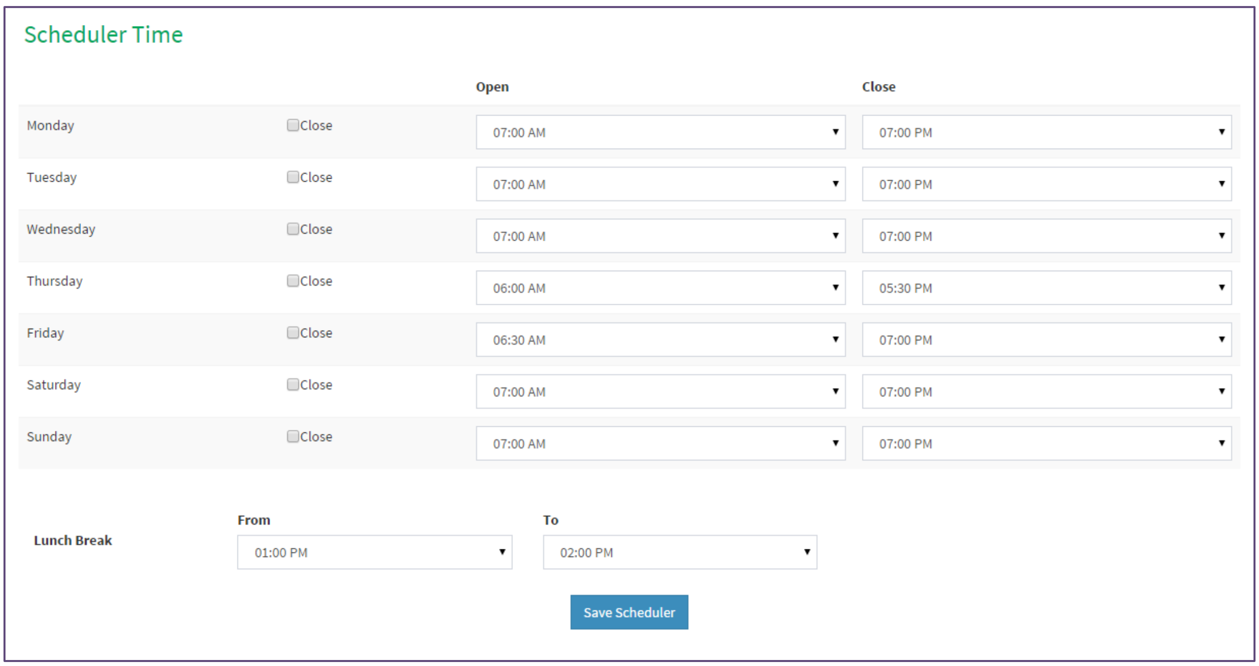
i. You can also select the individual formatting for Numbers, Currency, Time, and Date

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™

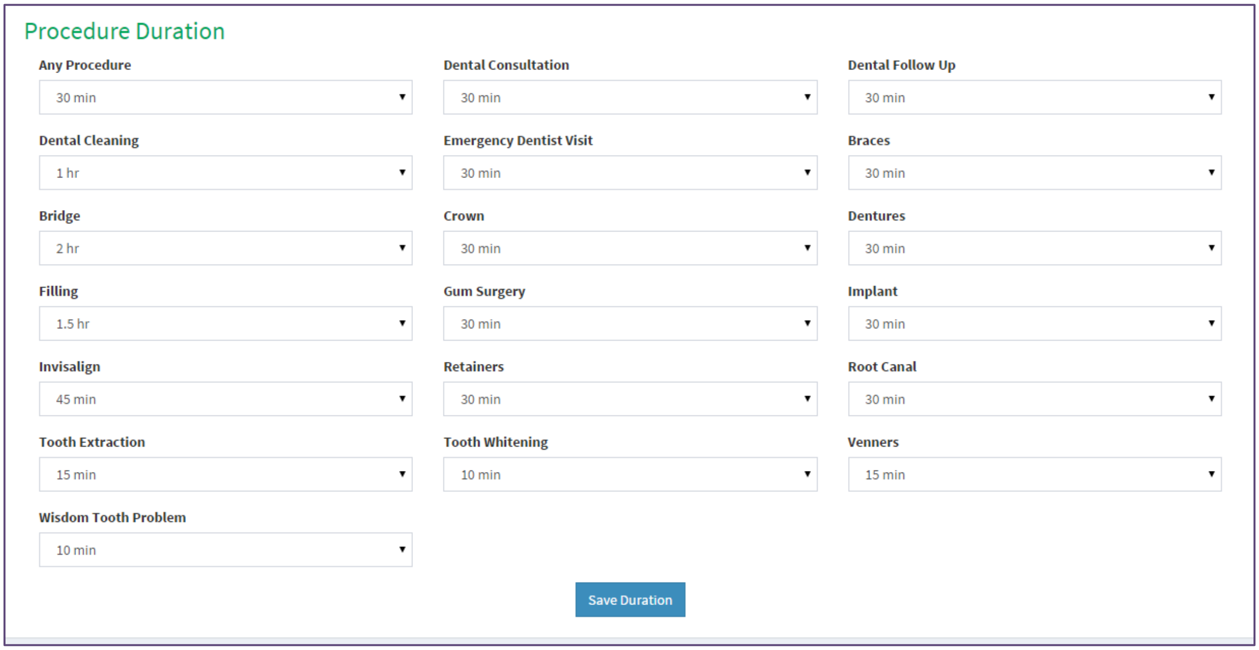
i. You can define whether your practice is closed, your practice's daily open and close times, and your scheduled lunch hour

ii. Click "Save Scheduler" button to save your settings

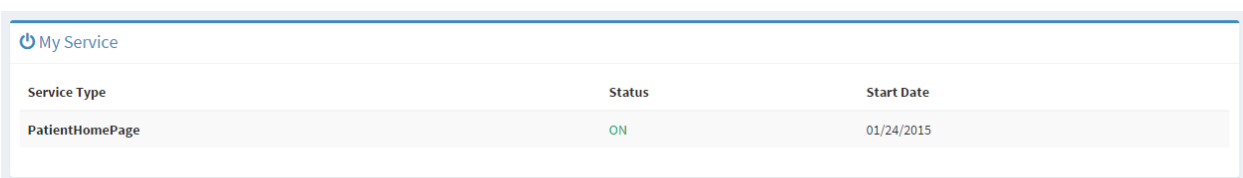


ii. Procedure Duration will allow you to setup the time duration for a list of the most often requested appointments from patients via **Patient**HomePage™

   i. Use the drop-down selections for each procedure and click the "Save Duration" for settings to apply

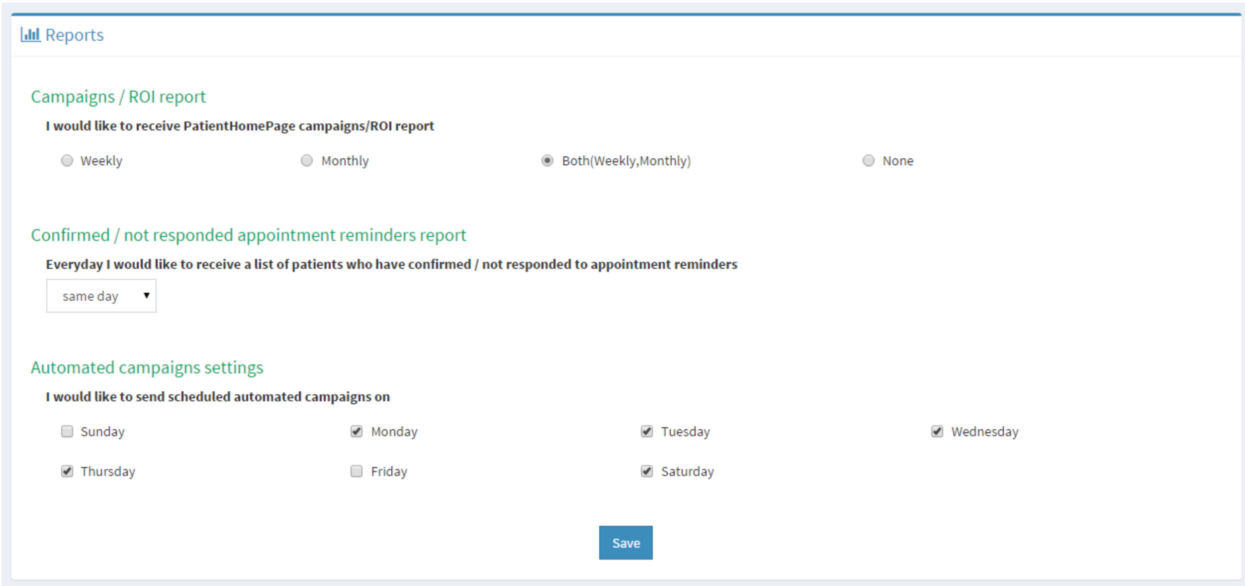


f. My Service



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

g. Reports



i. Campaigns / ROI Report contains your return on investment (ROI) using **Patient**HomePage™

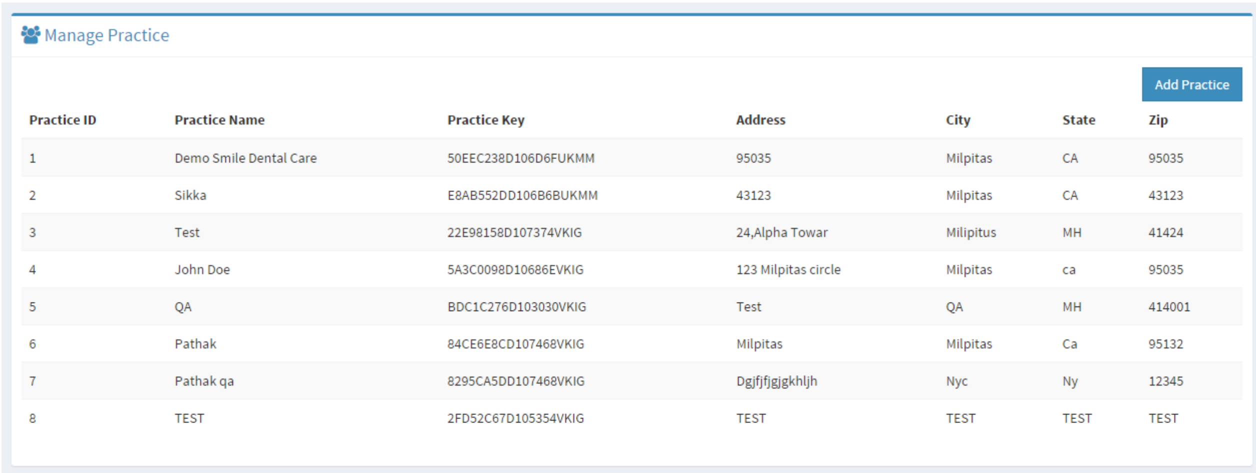
    i. This report will automatically be sent to your email address unless you select "None"
    Note: ROI is calculated using the campaigns and how much adjusted production comes from those patients who respond to those campaigns

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

iii. Automated Campaigns Settings allows you to choose the days of the week you would like to send your automated campaigns on

h. Manage Practice



Manage Practice

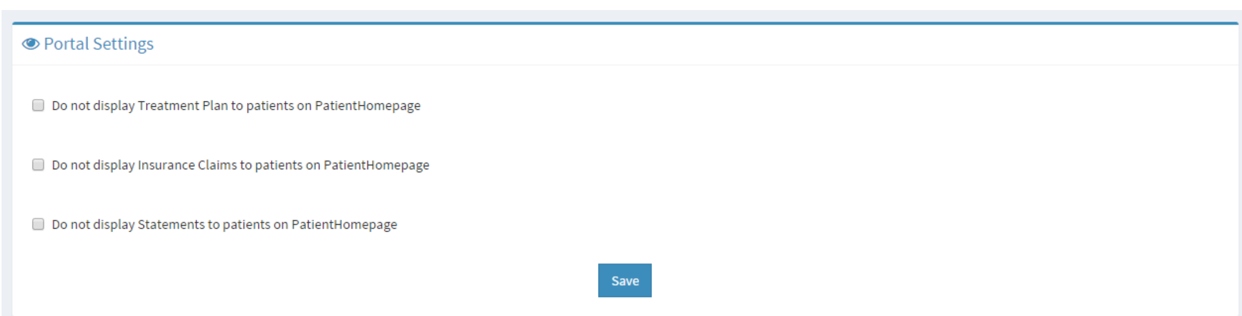
Add Practice

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	Dgjfjfjgjgkhljh	Nyc	Ny	12345
8	TEST	2FD52C67D105354VKIG	TEST	TEST	TEST	TEST

i. This screen displays the practices that have been added to your **Patient**HomePage™ account, or are present in your practice management software

ii. 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

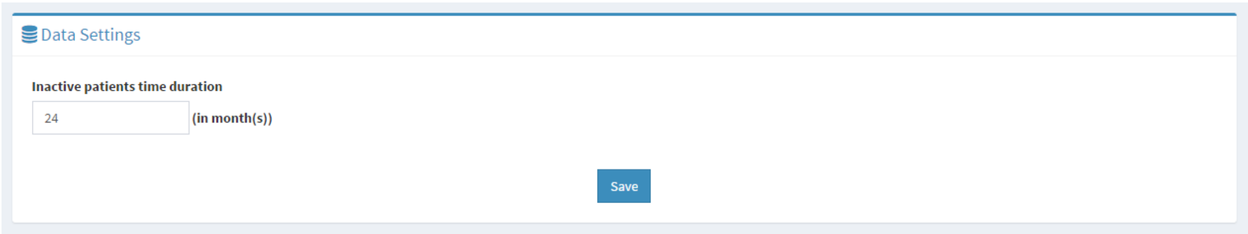
i. Portal Settings



i. You can choose to display or not display Treatment Plan, Insurance Claims, and Statements information to your patients using **Patient**HomePage™ - on their accounts

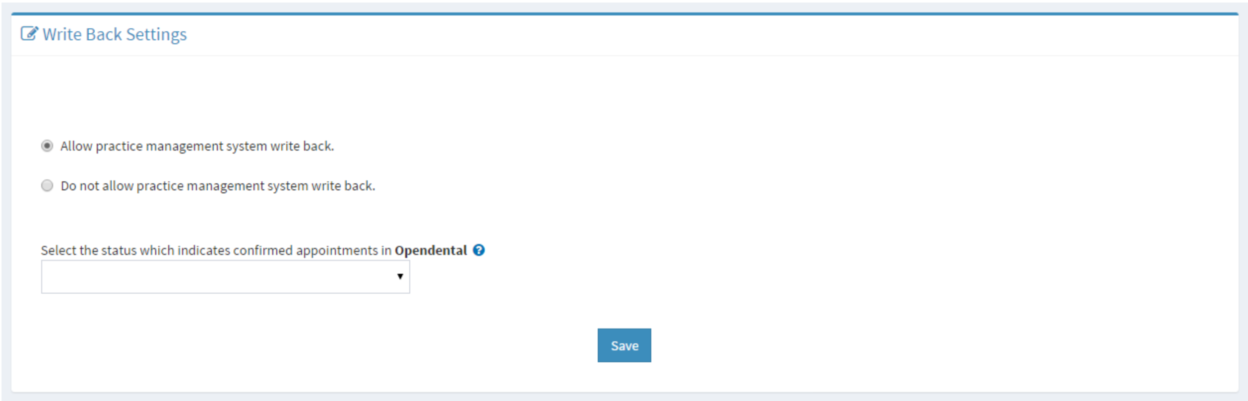
i. Select the check box if you do not want to display this information
Note: This information will be displayed to patients by default on their portal

j. Data Settings



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



i. You can choose to enable PatientHomePage 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 confirmation status in the appointment in your practice management software

Note: Write back functionality will only work for certain practice management software

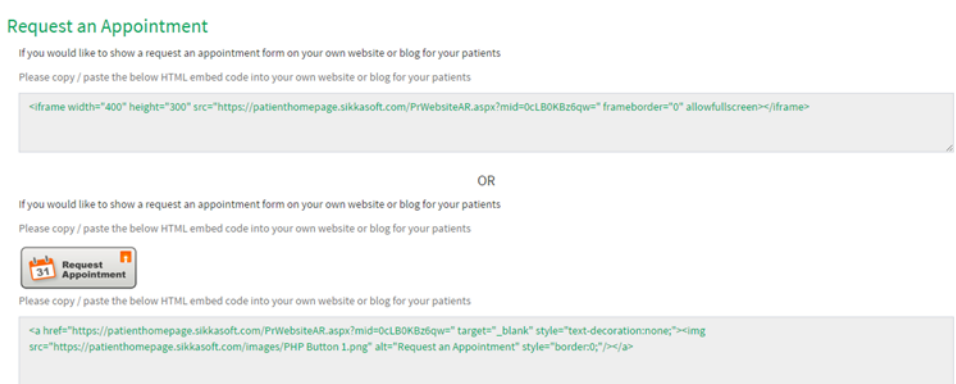
PM System Name	Version
Abeldent	9, 10, 11
Dentrix	11, 12, G4(14), G5(15)
DSN Dental	11.7
Eaglesoft	15, 16, 17
Easy Dental	2010
Open Dental	12, 13, 14
PracticeWorks	7, 7.5, 7.6
Win OMS	8.3, 8.4, 8.5, 8.6, 8.7, 8.8
OCS	2011
Power Practice Pro	4.4
Softdent	16
Mogo	10, 14, 15, 16

Please check with Sikka Customer Success before allowing write back, we are constantly updating this list.

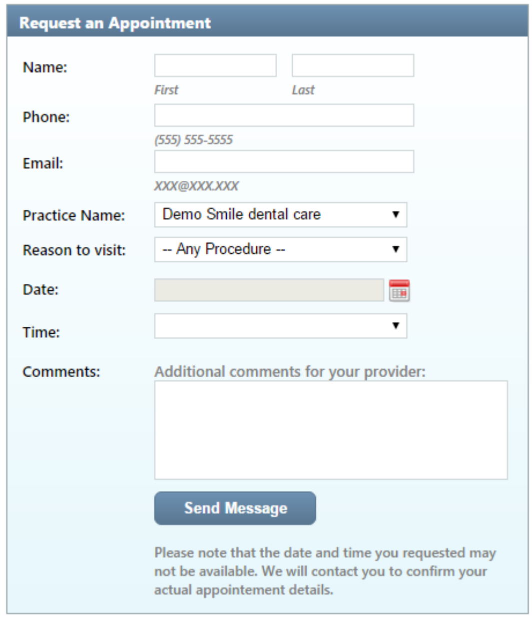
I. Widgets

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

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



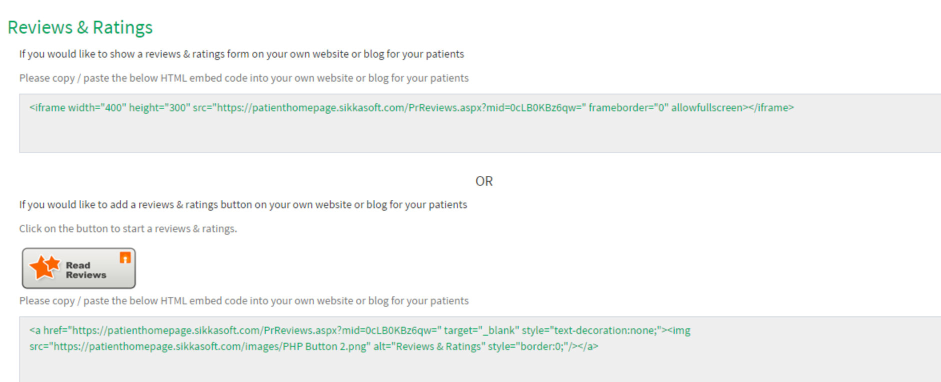
i. Clicking on the "Request Appointment" button will display this window



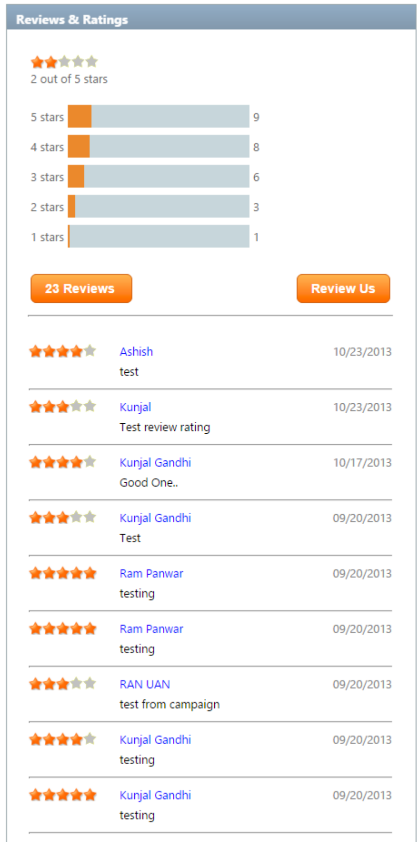
ii. You can copy the code for the form, or for the button and put them on your website for patients to interact with **Patient**HomePage™ right on your site
Note: Appointment requests are emailed directly to your email address, and your **Patient**HomePage™ inbox

ii. Reviews & Ratings

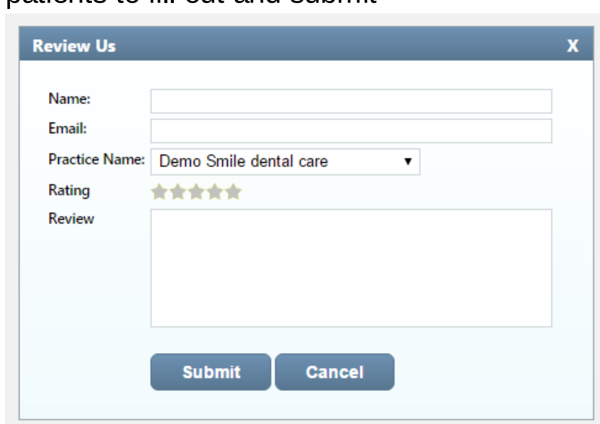
i. Read Reviews allows patients to click on the button and read reviews or leave a review of your practice



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

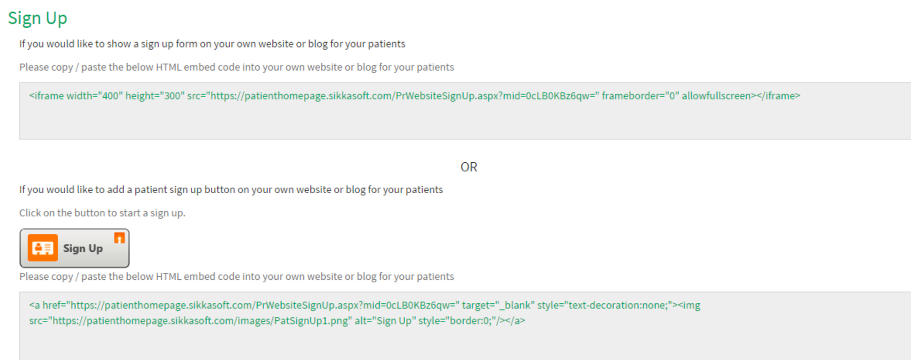


Note: Reviews are emailed directly to your email address, and your **Patient**HomePage™ inbox for you to approve before posting on your site via this widget

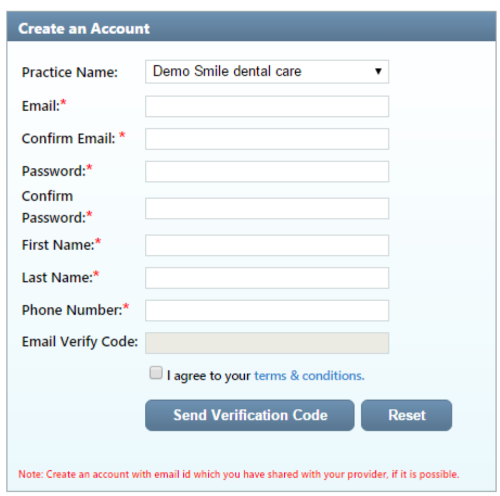
iii. You can copy the code for the form, or for the button and put them on your website for patients to interact with **Patient**HomePage™ right on your site

iii. Sign Up

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

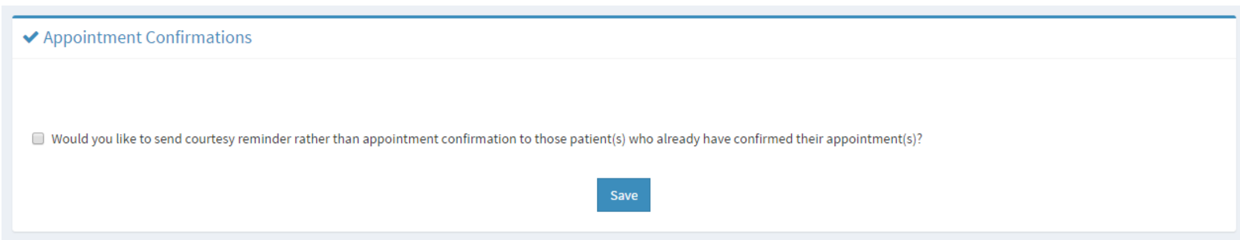


i. Clicking on the "Sign Up" button will display this window



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

m. Appointment Confirmations



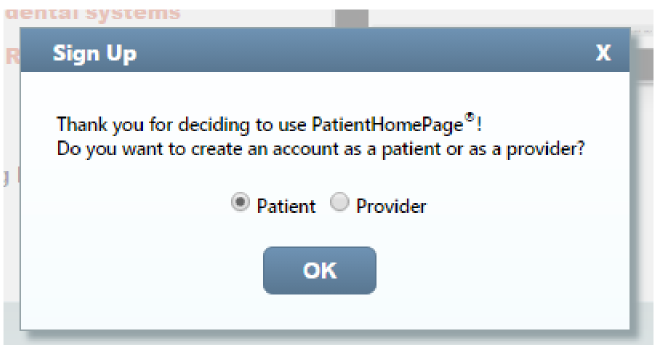
i. Clicking on the box will setup a logic that if a patient has already confirmed an appointment reminder, then PatientHomePage™ will not include the confirm button again in subsequent reminders – they will be courtesy reminders only

8. Signing Up for a **Patient**HomePage™ Patient Account

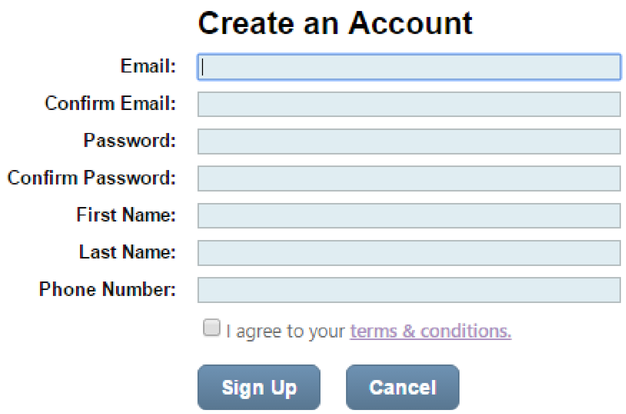
a. Go to: https://patienthomepage.sikkasoft.com/login.aspx

b. Click on “Sign Up” link

c. Select “Patient” in the Sign Up window



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



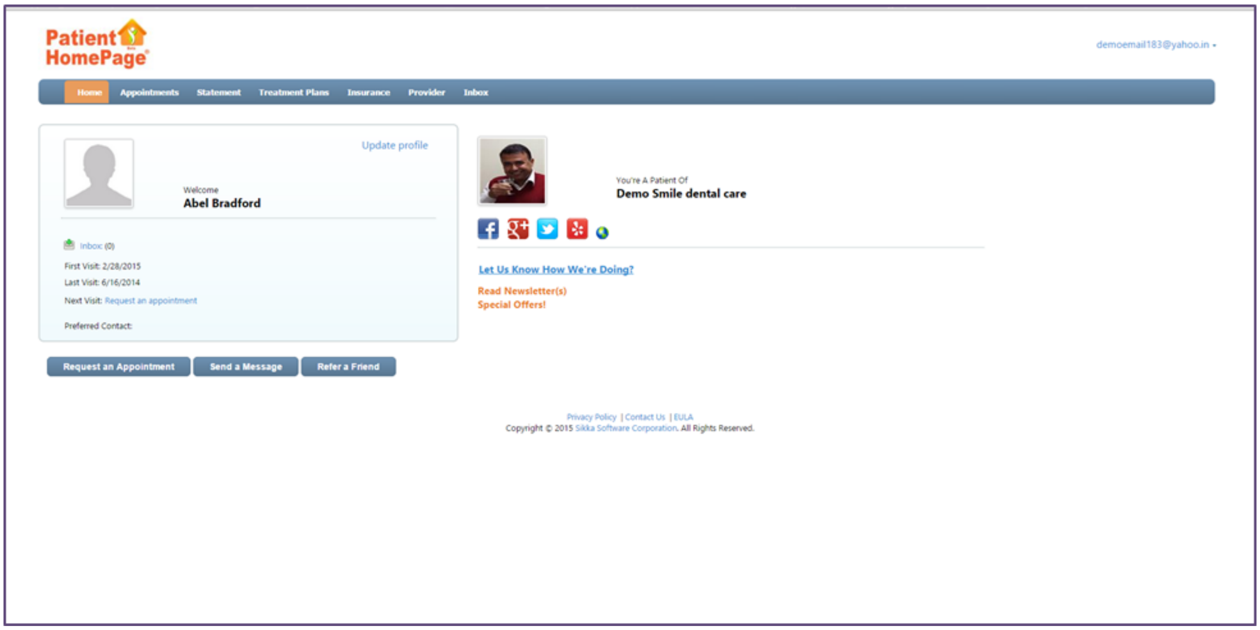
Note: Make sure you remember your Email and Password. You will need these to sign in to your new **Patient**HomePage™ account

9. Signing In To **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

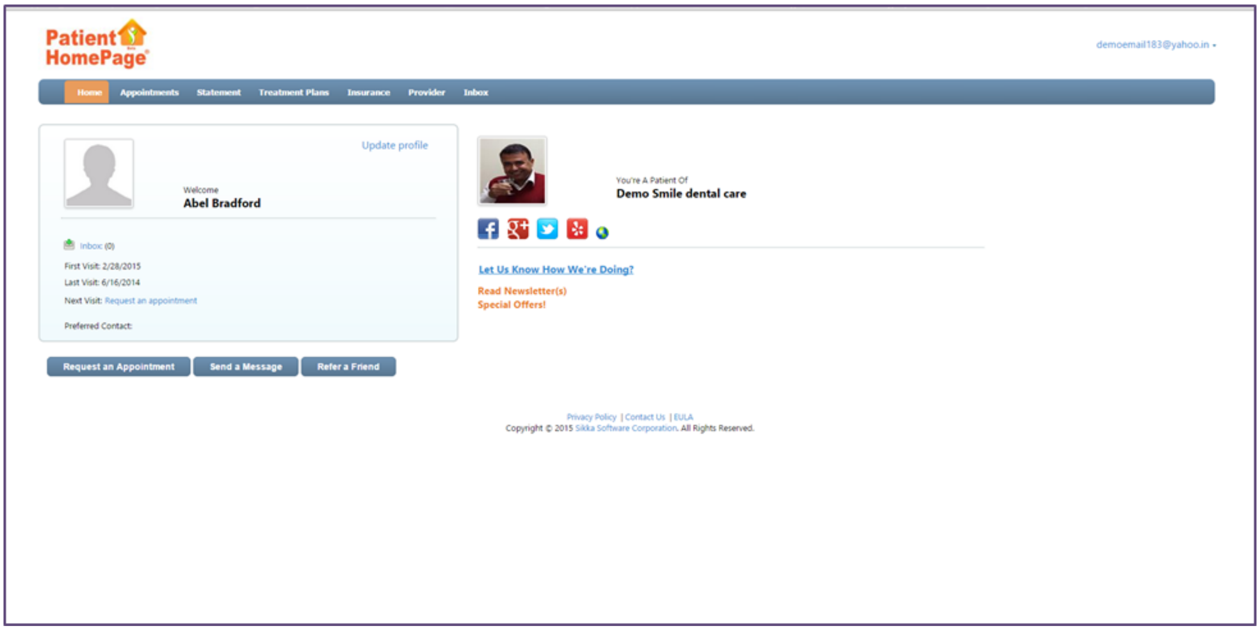
3. After accepting the License Agreement you will see the Home page



10. Navigating the **Patient**HomePage™ Account

a. Upon signing in, you will see the following features on the Home Page:

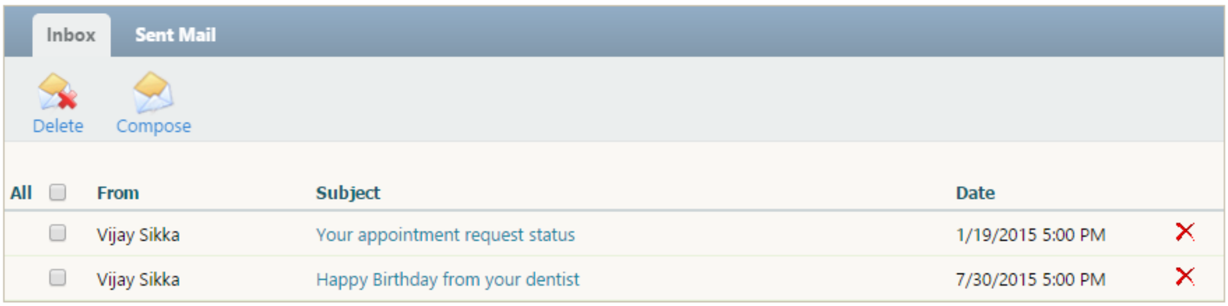
   i. Email ID
   ii. Navigation Menu
   iii. Profile
   iv. Provider
   v. Request an Appointment
   vi. Send a Message
   vii. Refer a Friend



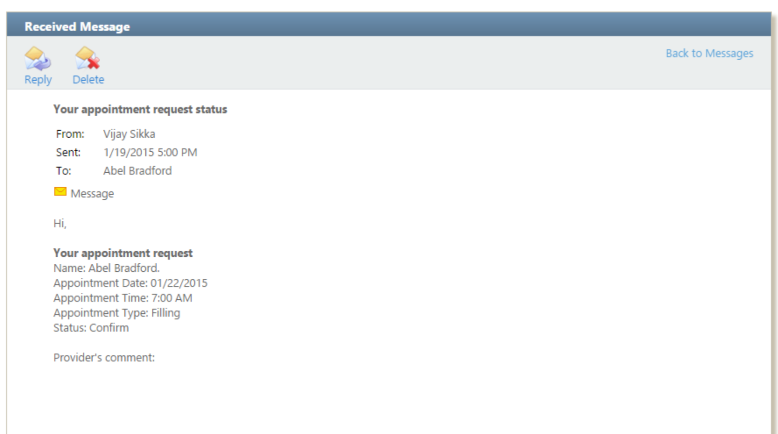
i. Email ID

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 massages using **Patient**HomePage™

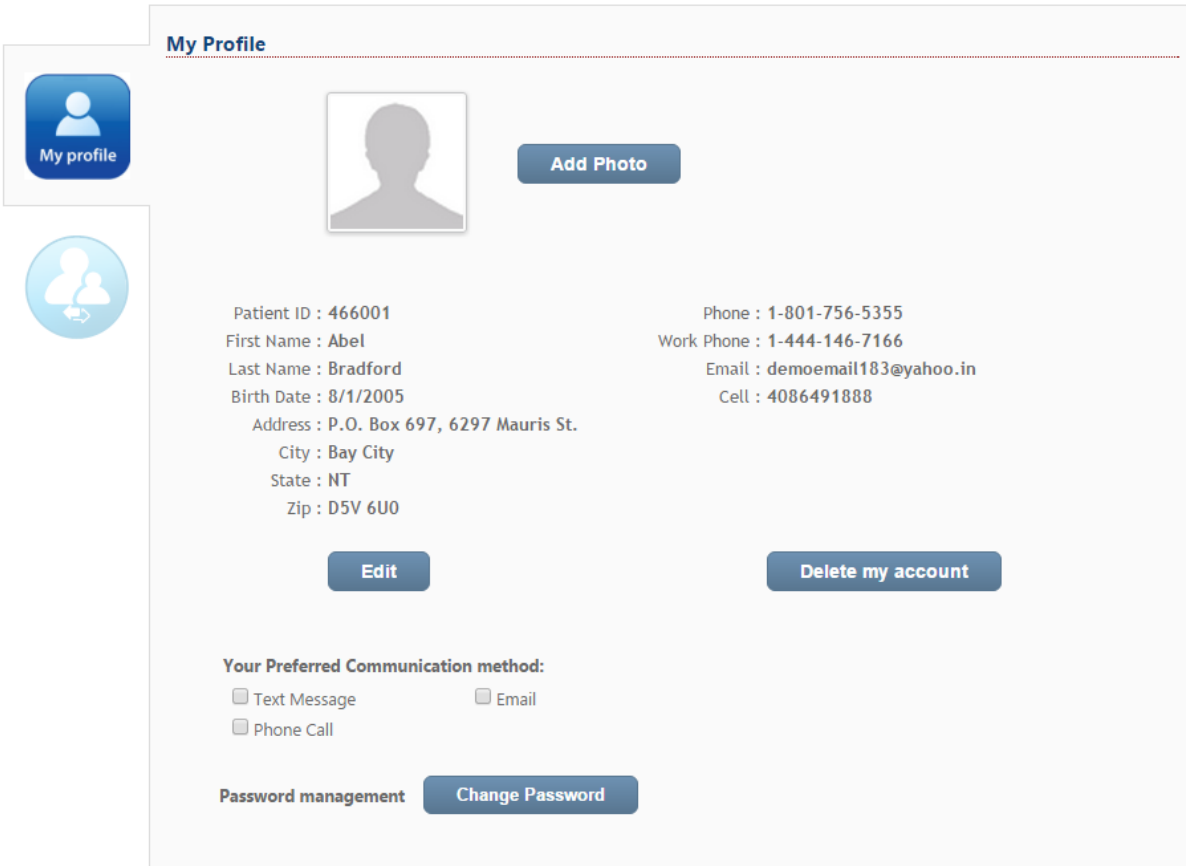


1. You can Delete emails from your inbox using the Delete function or the red “X”
2. You can Compose new emails to send to your provider
3. Clicking on the Subject of an email will open that email message

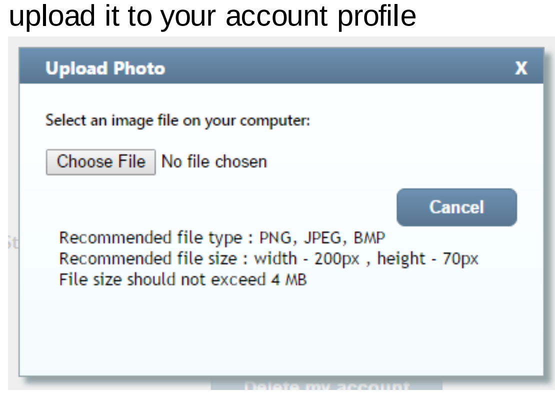


a. Clicking “Back to Messages” will send you back to your inbox

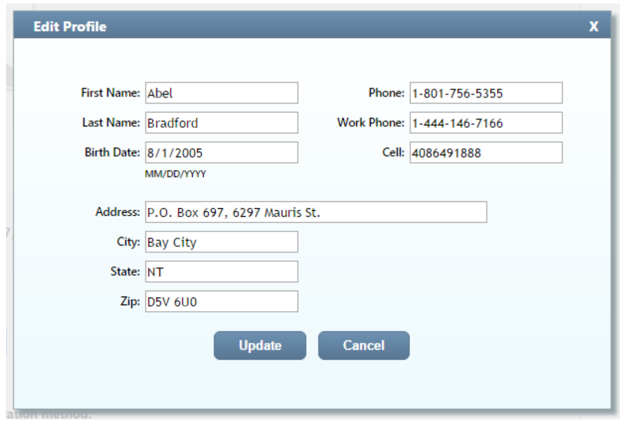
b. My Account will display your My Profile page where you can Add Photo, Edit profile info, select preferred communication method, Change Password, Refer you friends, or Delete my account



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



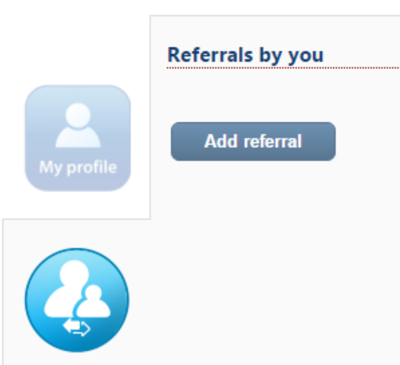
2. Clicking Edit will allow you to edit the info on your profile page

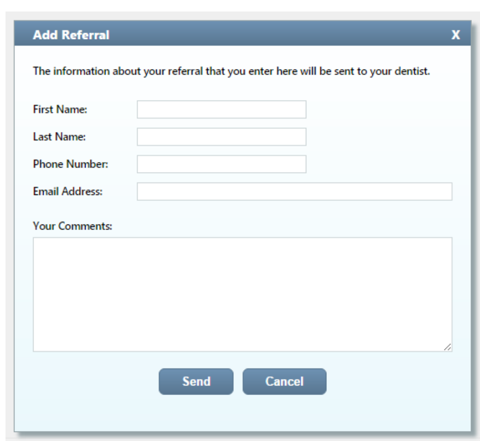


3. You can select how you would like to receive communications from your provider (email, text, phone)
   Note: These settings will filter messages from your provider to your preferred method

4. 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

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



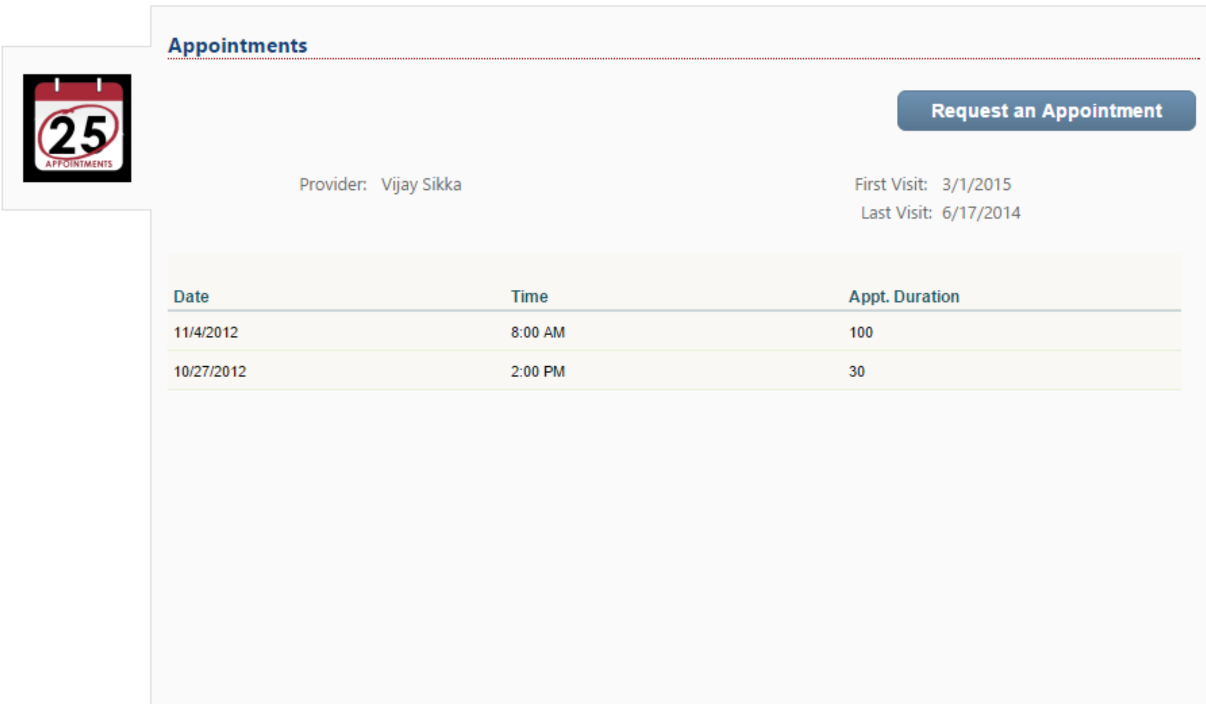


11. Using the **Patient**HomePage™ Navigation Menu Elements

i. Home

   i. Clicking “Home” will display the Home screen

ii. Appointments

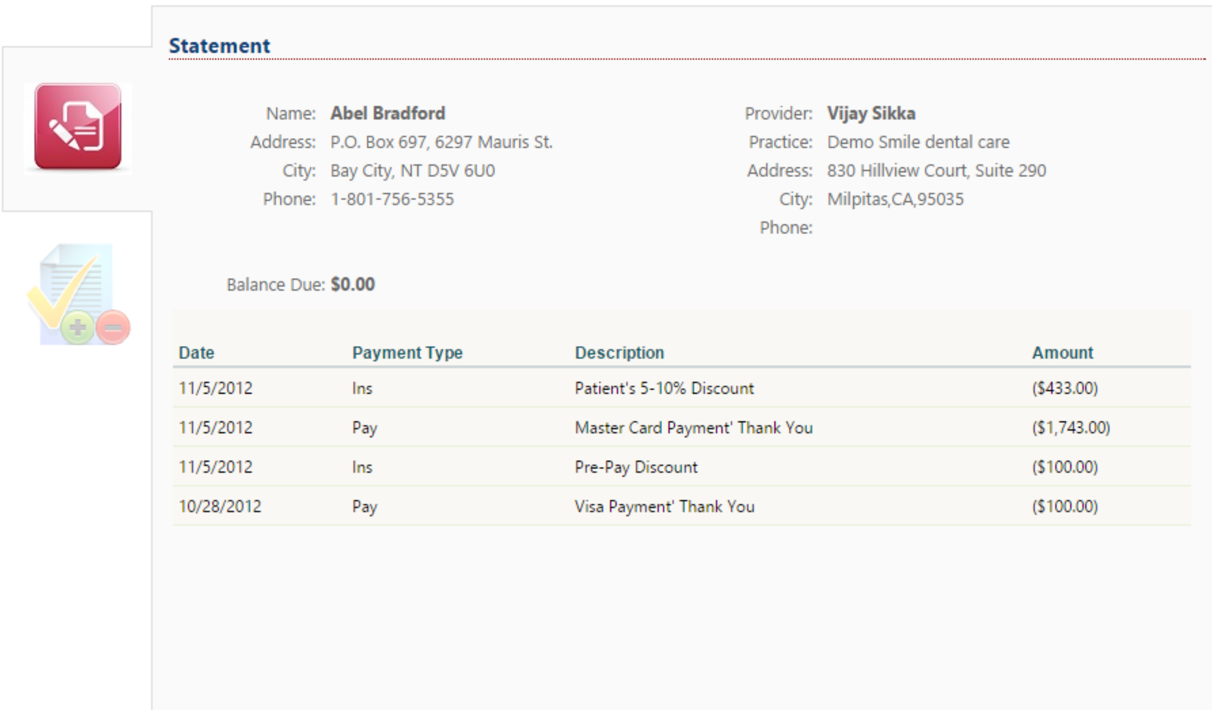


   i. Clicking “Appointments” will display your historical appointment details with this particular provider

   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

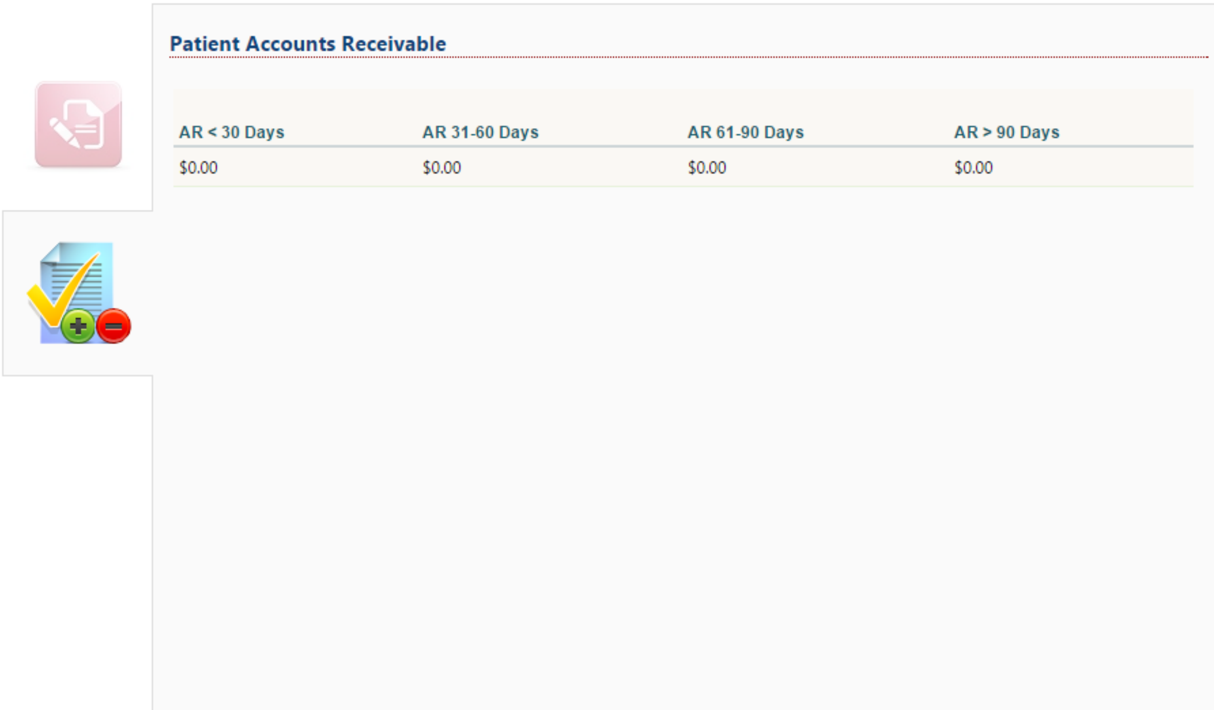
Name: **Abel Bradford**
Address: P.O. Box 697, 6297 Mauris St.
City: Bay City, NT D5V 6U0
Phone: 1-801-756-5355

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)

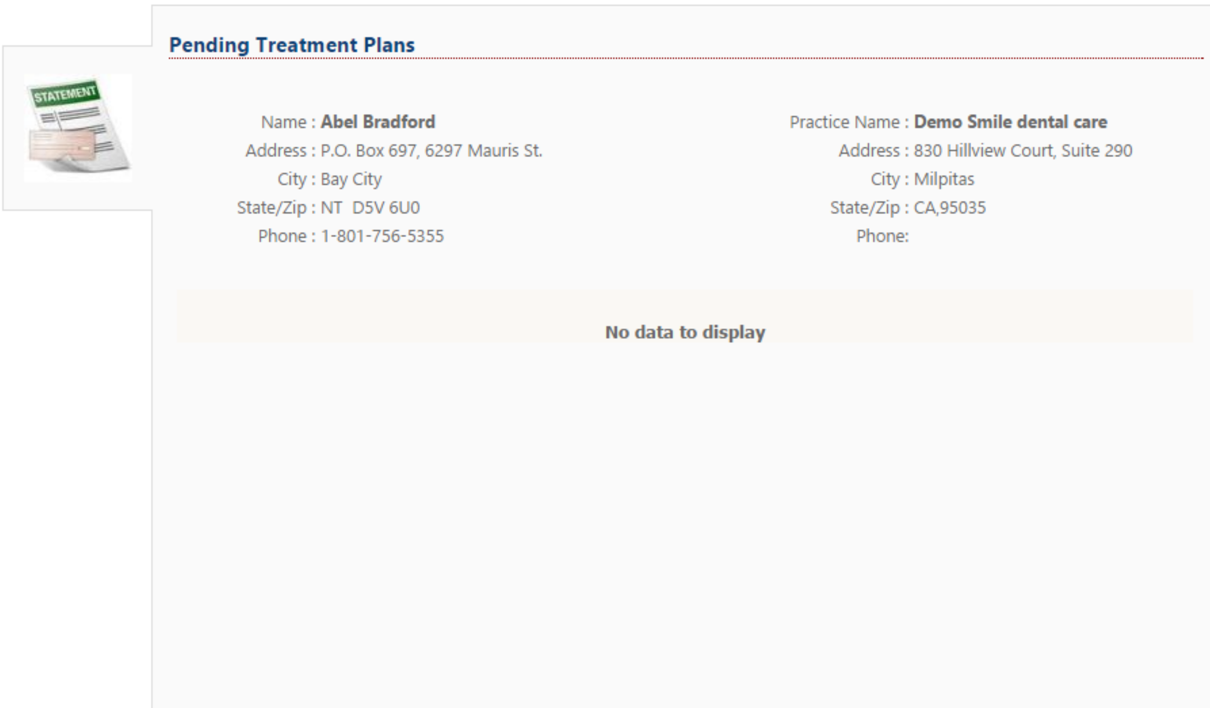
ii. Clicking the Accounts Receivable icon will display your A/R details



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

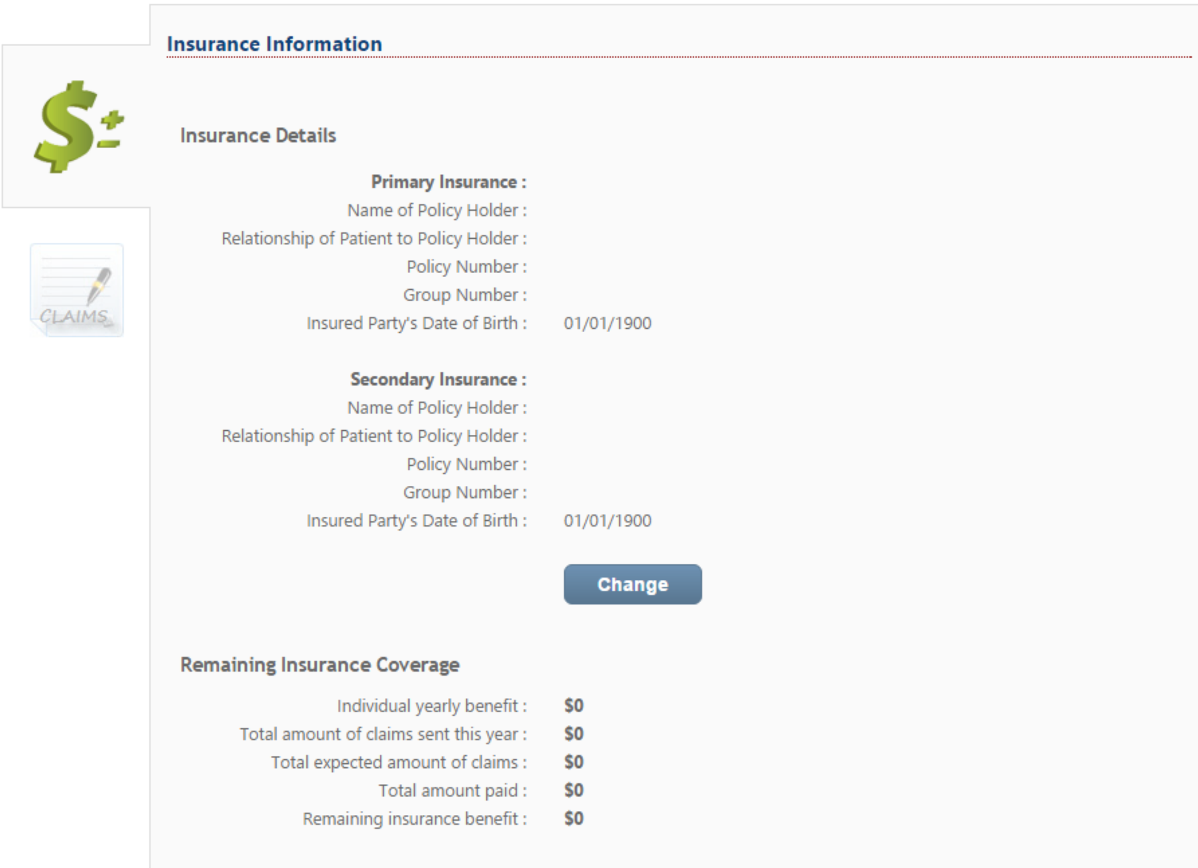
i. Clicking "Treatment Plans" will display your pending treatment plan details: your address and phone, your provider's address and phone, and any pending treatment plans you have not yet completed



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

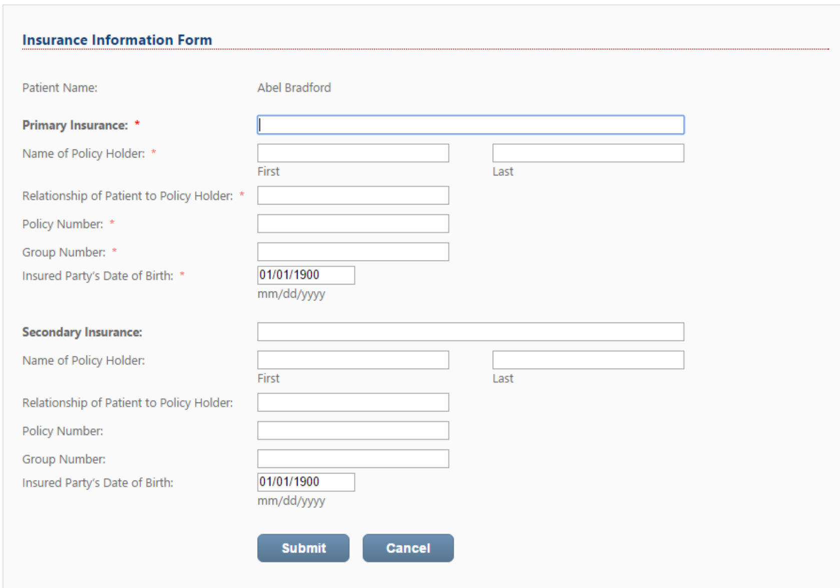
v. Insurance

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



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



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

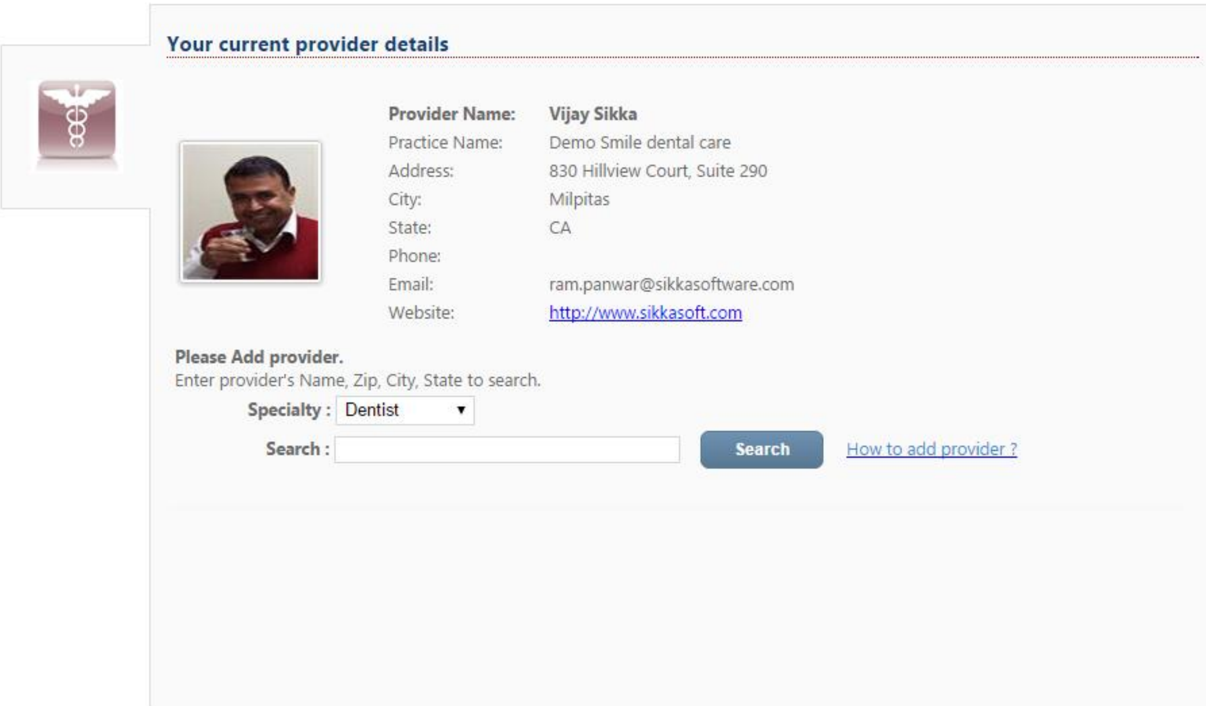
iii. Claims

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



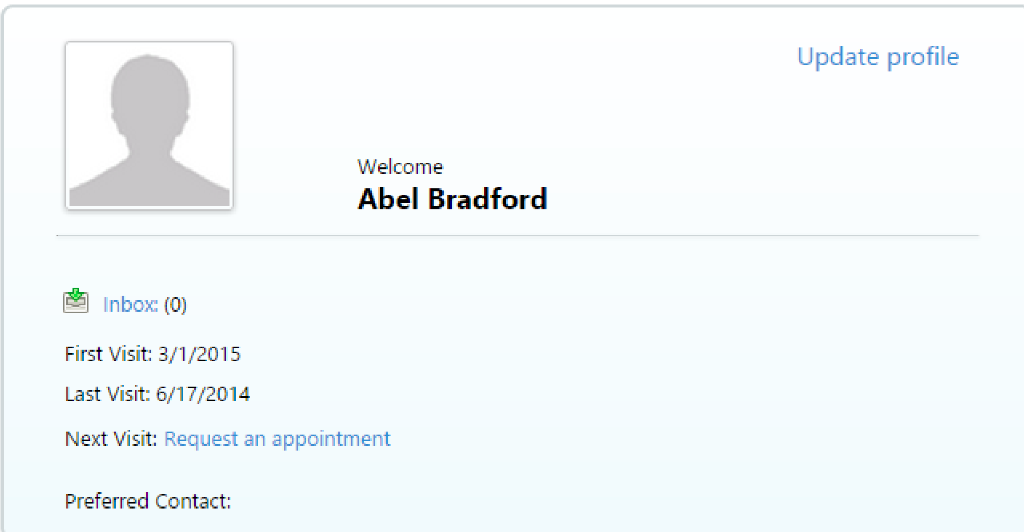
ii. You can add a provider by choosing a specialty and searching the SIkka network of over 13,000 providers
Note: There's also a link "How to add provider?" which will walk you through how to add a provider to your **Patient**HomePage™ account

vii. Inbox

i. Clicking "Inbox" will display your **Patient**HomePage™ 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



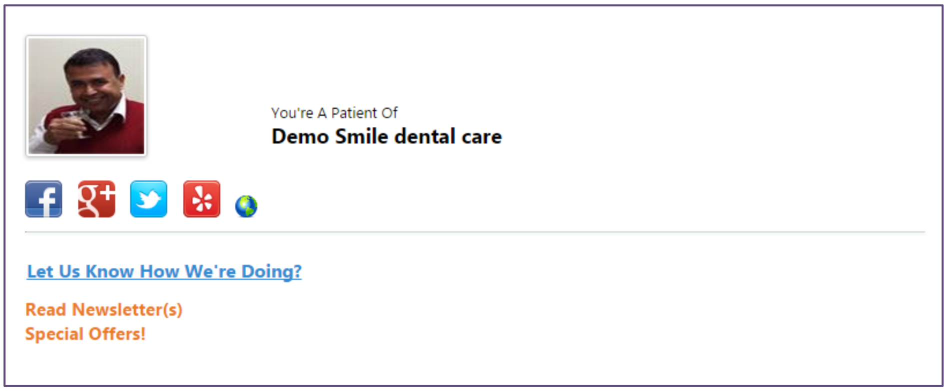
ii. Clicking "Update Profile" will open the My Profile screen which allows you to update your profile info

iii. Clicking the "Inbox" link will open your **Patient**HomePage™ inbox

iv. Clicking the "Request an appointment" link will open the appointment request window

iii. Provider

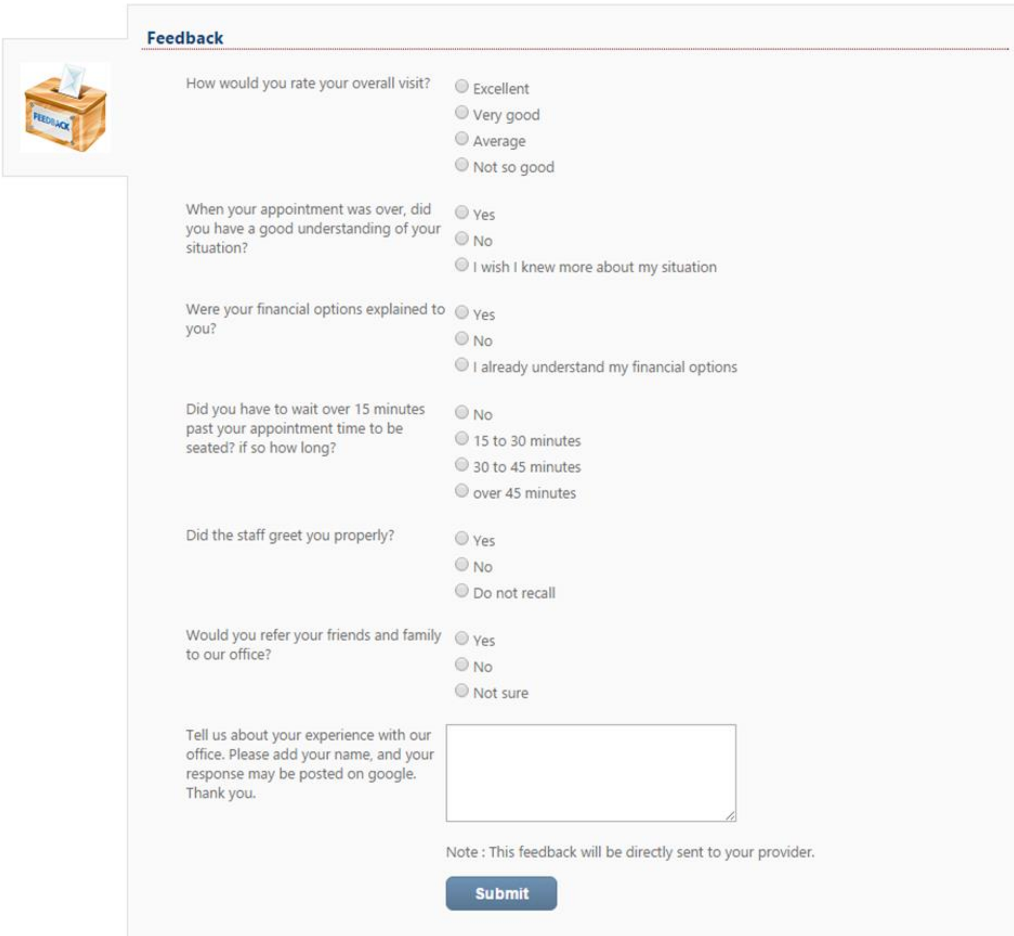
i. Your Provider section will display the details about your provider: photo, and name



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



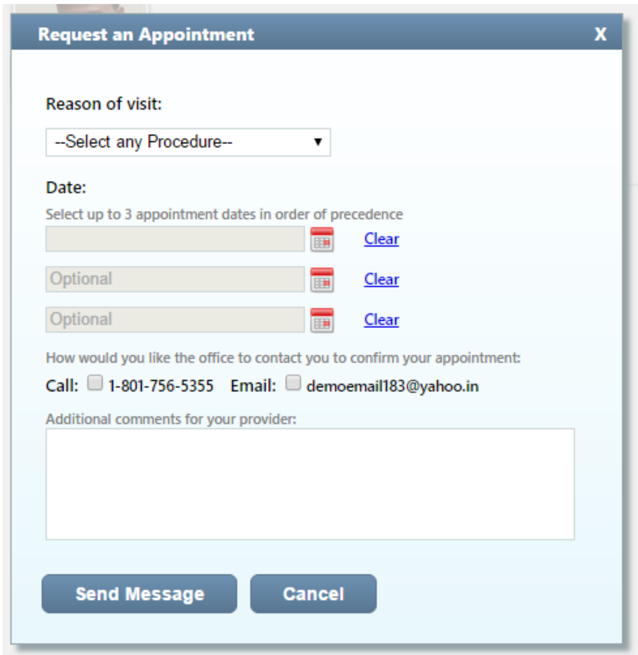
i. Clicking the “Submit” button will send your results directly to your provider
Note: This will not post online anywhere

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

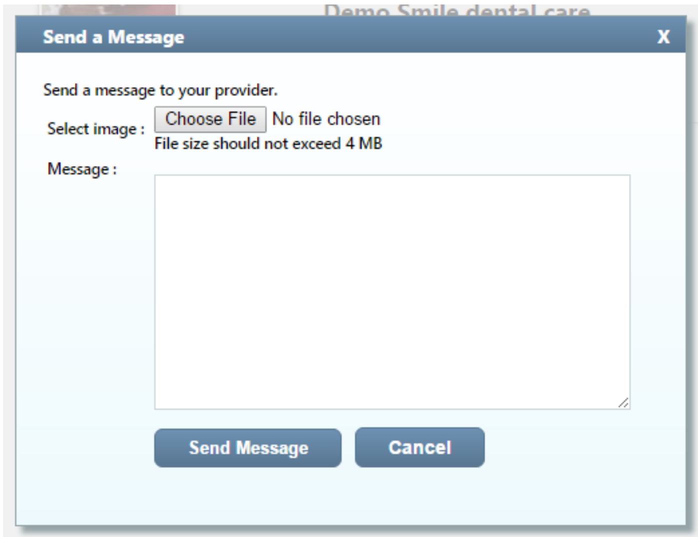
iii. You can select to be called and/or sent an email by your provider in regards to your appointment request

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



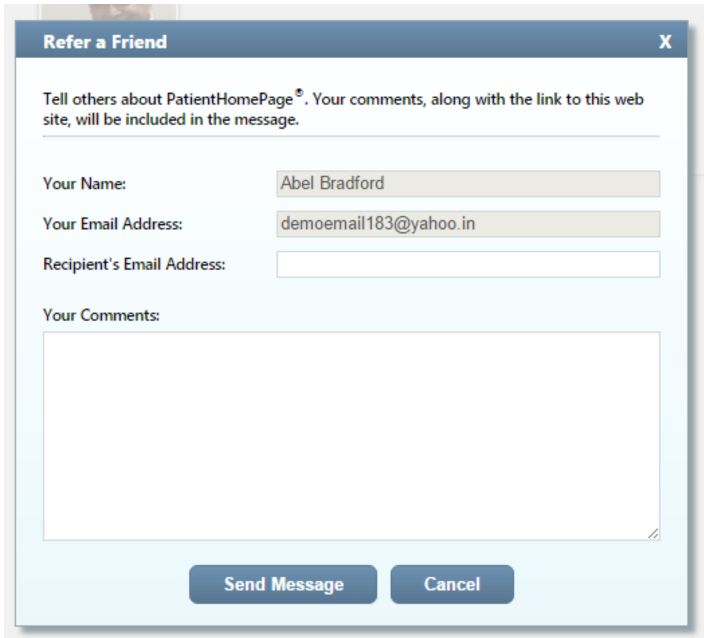
i. You can compose a message of any kind and send it directly to your provider using the text field

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



i. You can enter a friend's email address to refer them to PatientHomePage
Note: A link to join PatientHomePage™ 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