



# PatientHomePage™

## Version 3.0 User Guide

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## Provider Portal

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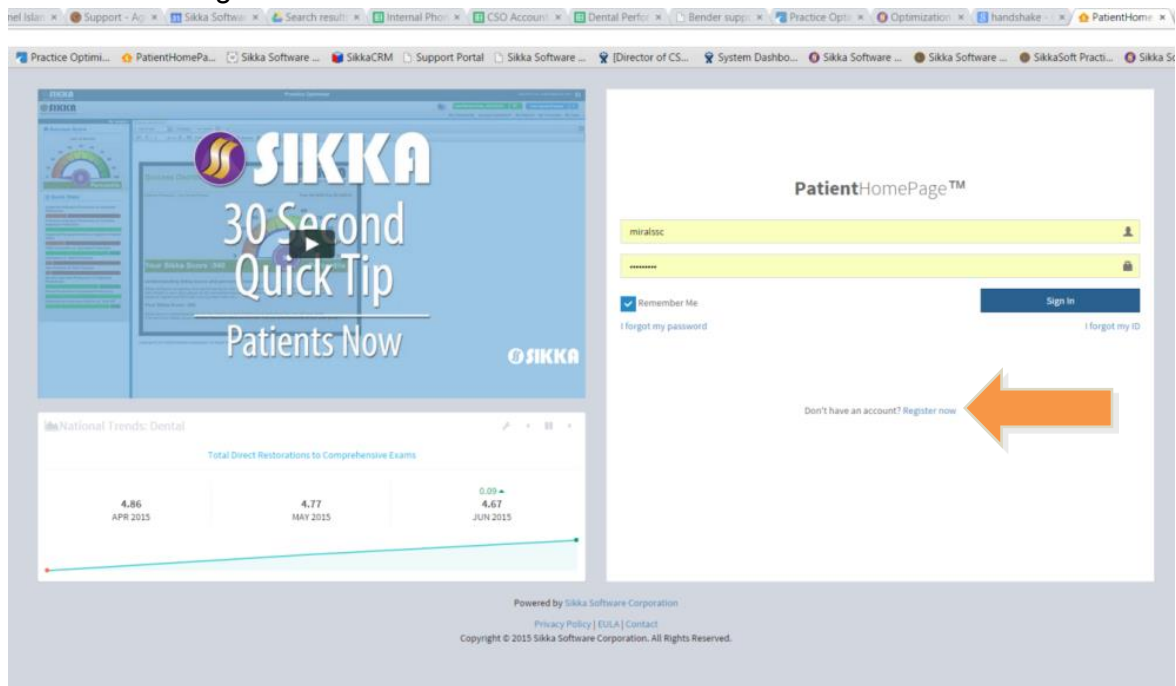
## Patient Portal

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### 1. Signing Up for a PatientHomePage™ Provider Account

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



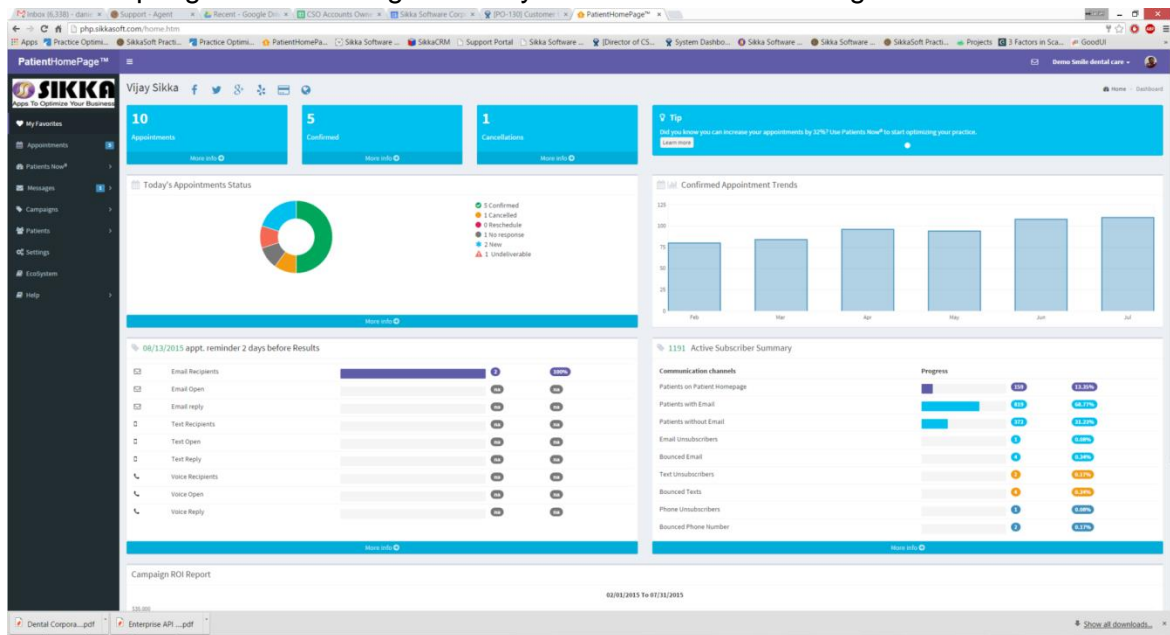
3. Fill out the online form (next page), agree to the terms, and click “Submit” button  
**Note:** Make sure you remember your User ID and Password. You will need these to sign in to your new PatientHomePage™ account

The screenshot displays the 'Sikka Apps Registration Form' on a web page. The form includes the Sikka logo and tagline 'Apps To Optimize Your Business' at the top left, and a contact number '800-94-SIKKA' with a 'REQUEST A DEMO' button at the top right. A navigation bar contains links for Home, Apps, Ecosystem, Publications, About Us, and Contact Us. The form title is 'Sikka Apps Registration Form' with a note that an asterisk (\*) indicates mandatory fields. The form is divided into several sections with input fields: a 'Specialty' dropdown menu; 'First Name' and 'Last Name' text boxes; 'Email', 'Create Password', 'Create User Name', and 'Confirm Password' text boxes; 'Practice Name', 'City', 'Zip Code', 'Phone', 'Practice Management System (PMS)' dropdown, 'PMS User Name', 'Windows User Name', 'Address', 'State', 'Country' (with a dropdown set to 'United States'), 'PMS Password', and 'Windows Password' text boxes; 'Referred By' and 'Contact Person' text boxes; and a 'Comments' text area. At the bottom, there is a checkbox for 'I agree with Portal Agreement and HIPAA/ EULA Agreement' and a 'SUBMIT' button. Two orange arrows are overlaid on the image: one points to the 'Create Password' field, and the other points to the 'SUBMIT' button.

Note: In order to use **PatientHomePage™** 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

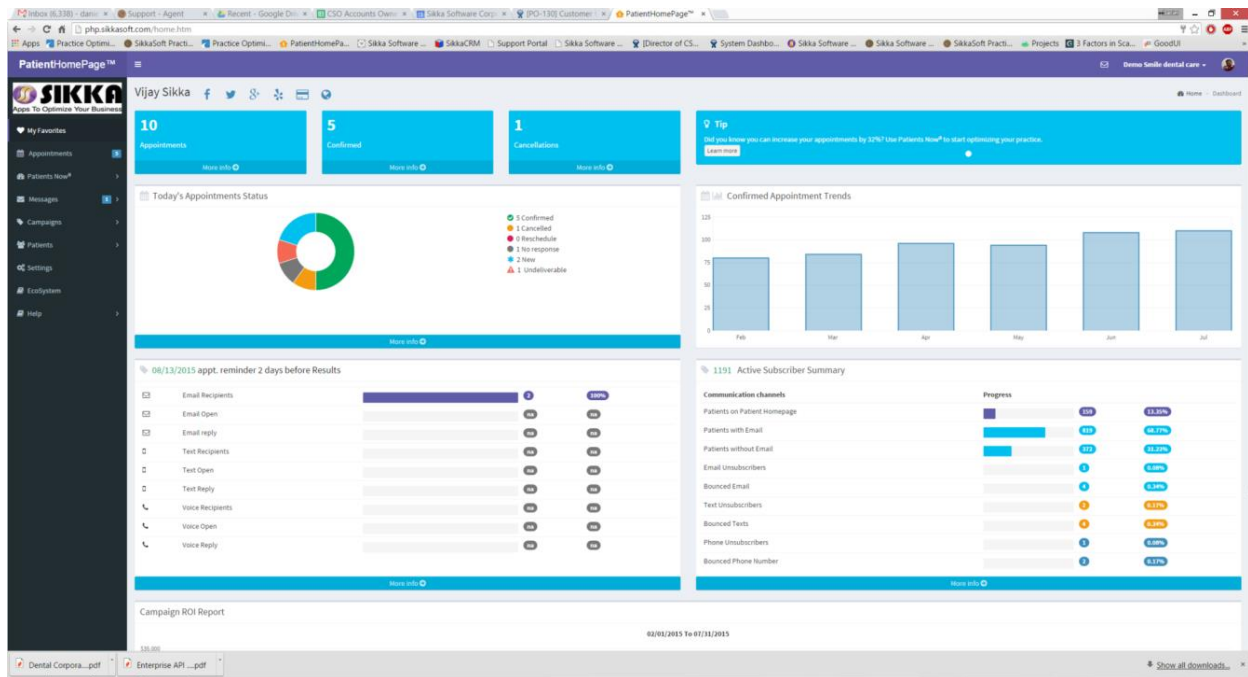
## 2. Signing In To PatientHomePage™ Provider Account

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 PatientHomePage™ 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 **PatientHomePage™**)
  - 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

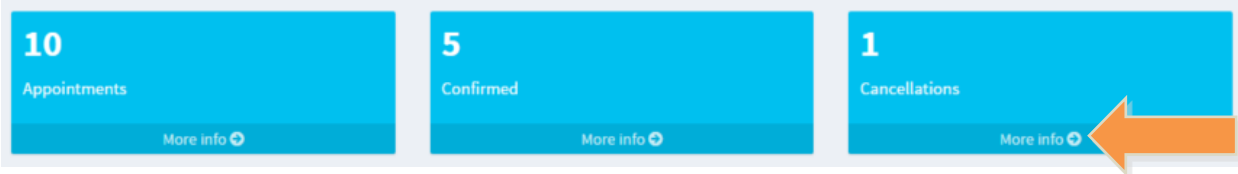


## A. Appointments, Confirmations, and Cancellations

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

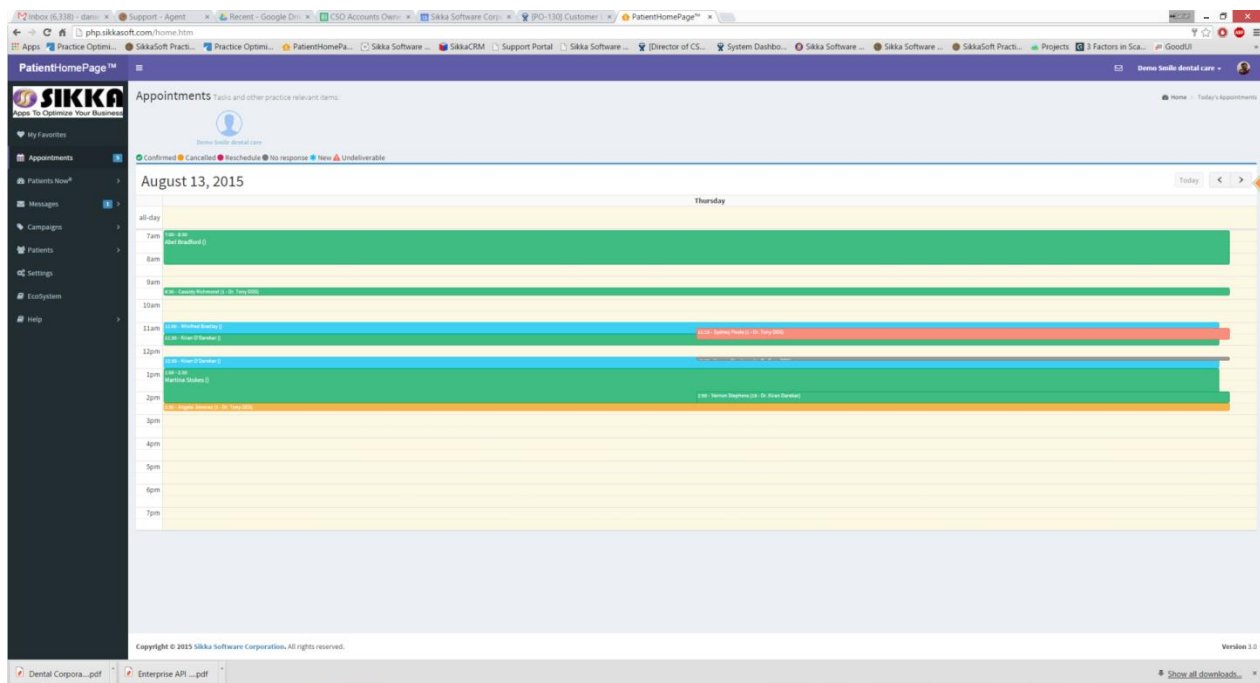
**Note:** These values are based on the last data refresh of your practice management software

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

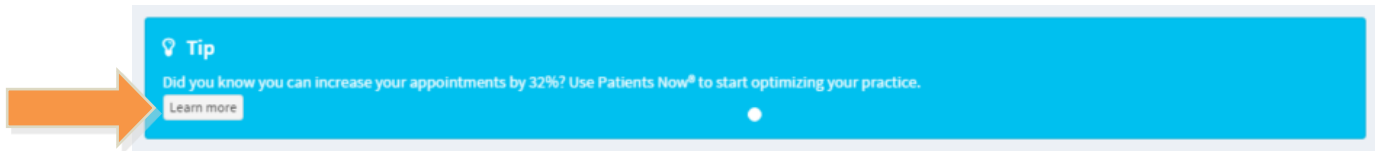
**Note:** These statuses are based on the responses to your appointment reminder campaigns



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

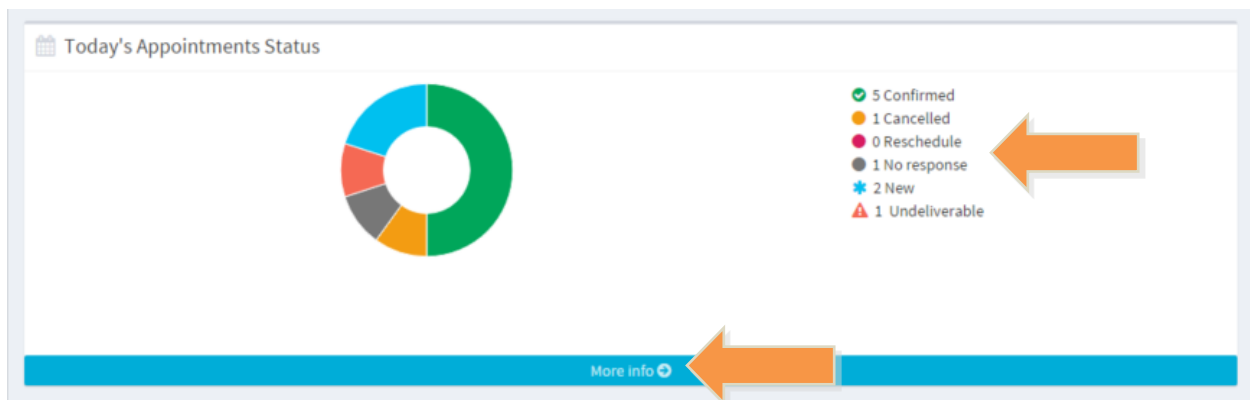
### B. Tips

1. **PatientHomePage™** 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



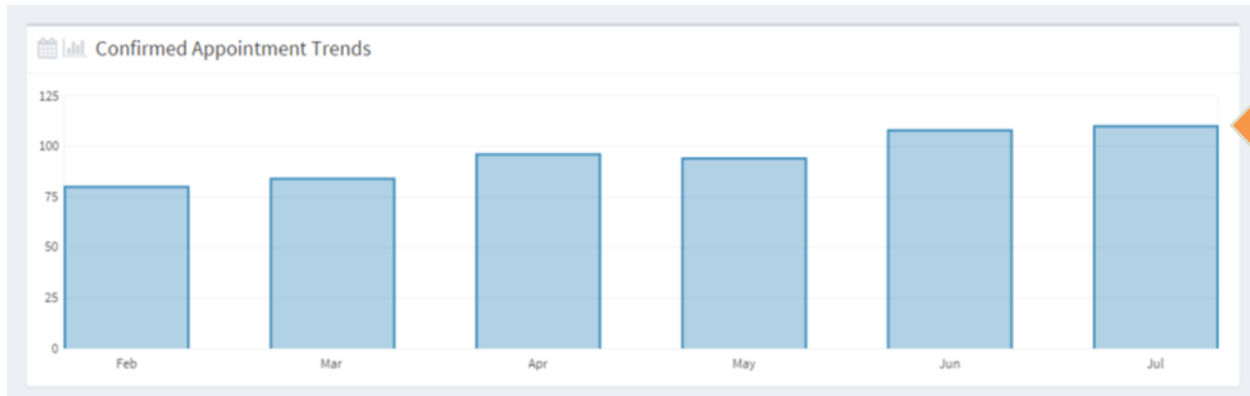
2. To see the detail for the day's Appointments percentages, click on the “More info” link
  - a. This will open the Appointments screen, showing you the appointment blocks for that day, as well as the colorized status alerts for Confirmed, Cancelled, Reschedule, No Response, New, and Undeliverable

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



## D. Confirmed Appointment Trends

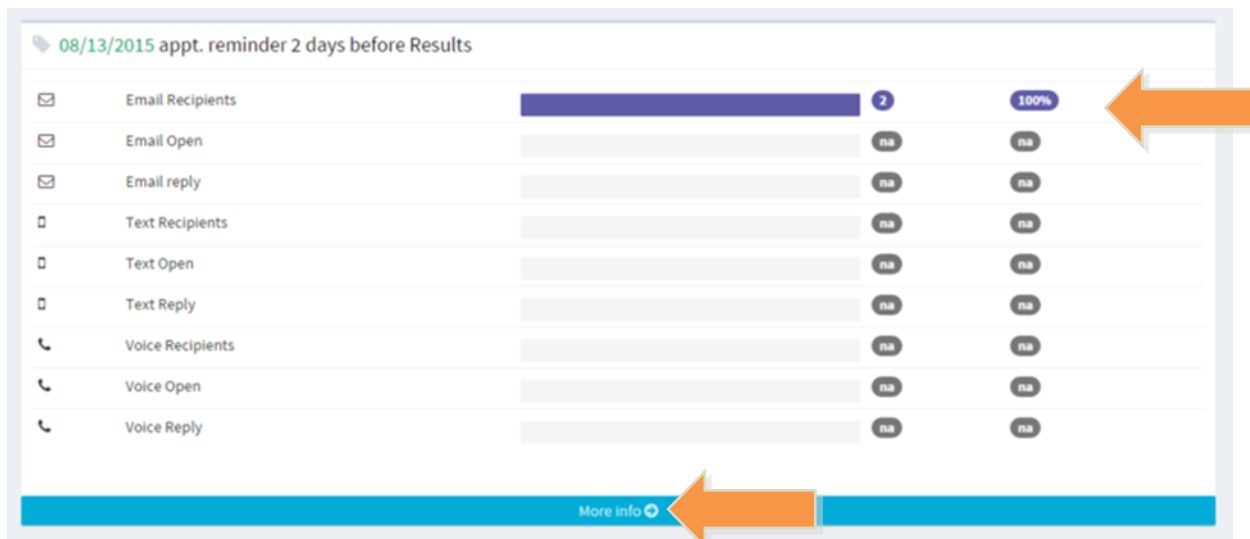
1. This bar graph will show you how many appointments were confirmed over the last 6 months



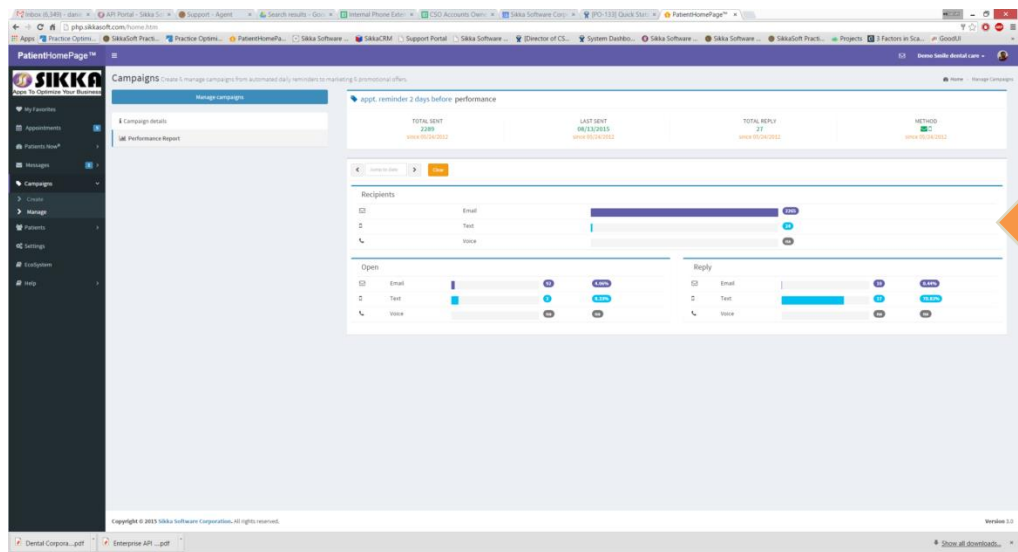
2. Hovering over each bar graph will show you the exact number of confirmations for that particular month

## 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

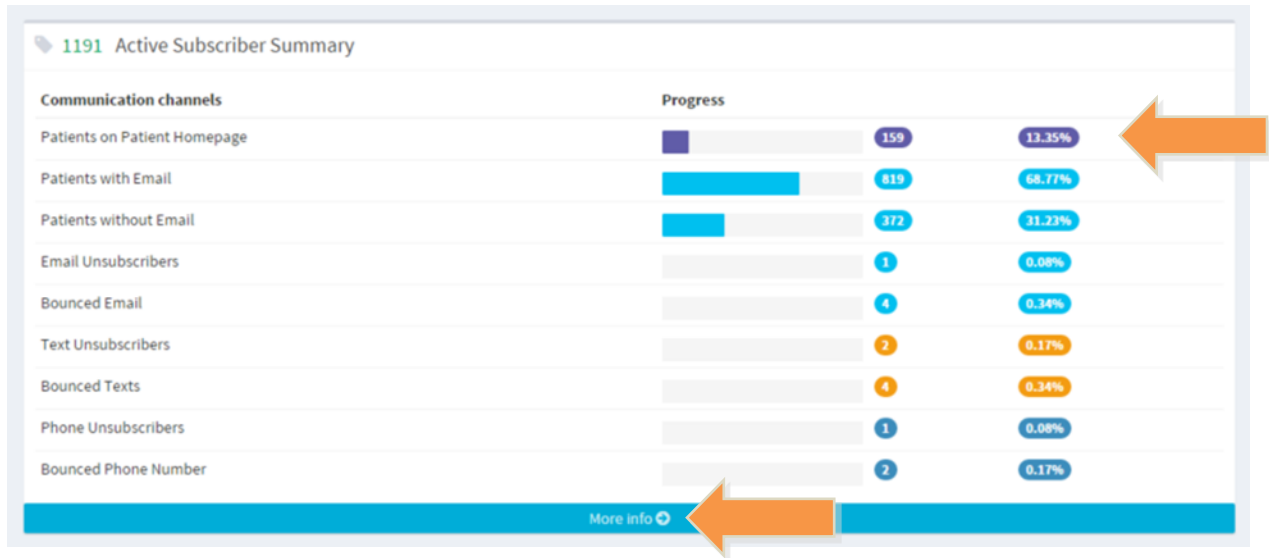


2. It will show you the actual number, and the percentage of patients who have received, opened, or replied to your campaigns
3. To see the detail for the Campaign statistics, click on the “More info” link near the bottom of the window
4. This will open the Campaigns screen, showing you the Performance 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 **PatientHomePage™** through the three communication channels (email, text, and voice)

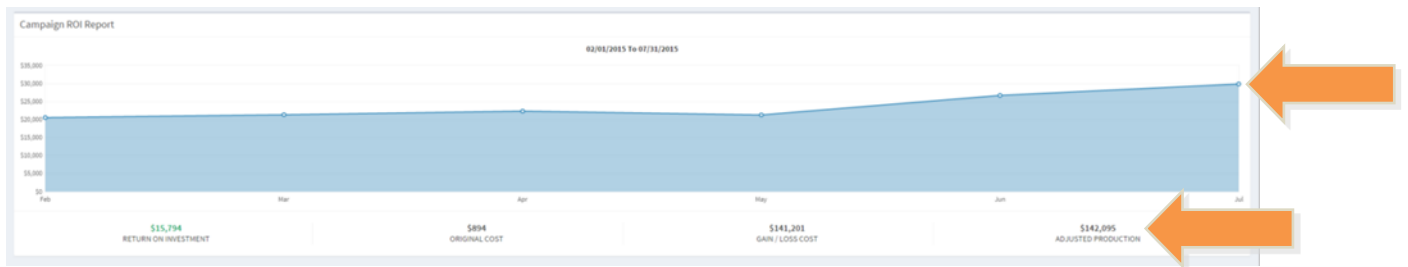


2. It will also measure your progress in getting your patients actively connected to you using the program
3. To see the detail for the progress, count, and percentages, click on “More info” link
4. This will open the Campaigns screen, showing you the Active campaigns currently running in **PatientHomePage™**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

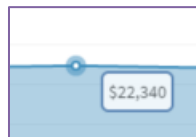
Program name	Frequency	Method	Type	Start	End	Action
Sign reminder & education	Daily	Text	Appointment reminders	10/24/2022	None	<a href="#">View</a>
Send to patients	One time	Text	Invite patients	11/11/2022	11/11/2022	<a href="#">View</a>
Today's birthday patients	Daily	Text	Birthday reminders	10/24/2022	None	<a href="#">View</a>
Today's patients feedback form	Daily	Text	Today's patients feedback form	10/24/2022	None	<a href="#">View</a>

## 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

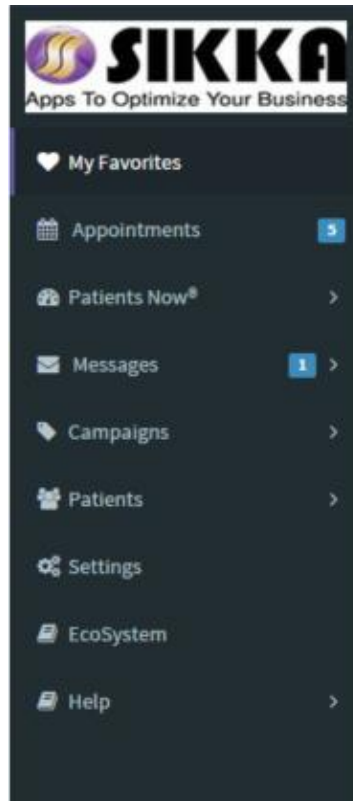


3. It will also display the totals since you began your PatientHomePage™ license for Return On Investment, Original Cost, Gain/Loss Cost, and Adjusted Production

## H. Navigation Menu

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

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



## I. Navigation Icon

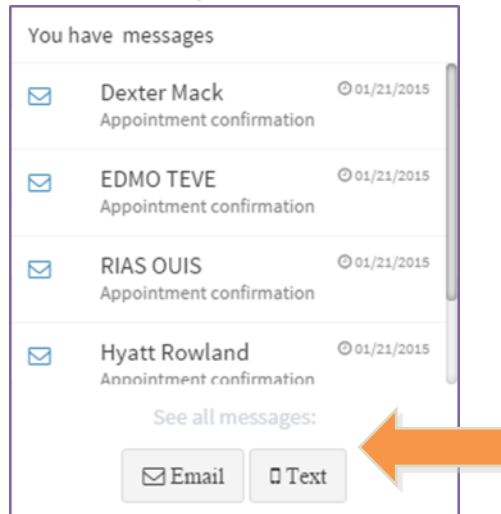


1. Clicking on this icon collapses the navigation menu to the left, giving more screen area for the data/templates screen

## 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

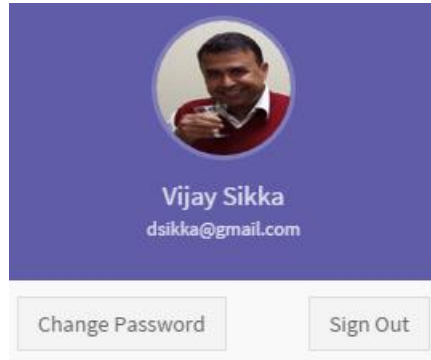
Demo Smile dental care ▾

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 **PatientHomePage™** 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

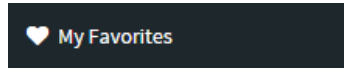
A screenshot of a 'Facebook Profile' dialog box. It shows the 'Current Link' as 'https://www.facebook.com/SikkaSoftware'. Below this is a 'Reset link' section with a text input field containing 'insert Facebook profile URL' and a 'Save' button. A note at the bottom says: 'Enter your Facebook profile URL, and your patients will be able to like you on facebook. e.g.: http://www.facebook.com/facebookprofileid'.

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 **PatientHomePage™** 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 PatientHomePage™ Navigation Menu Elements

### a. My Favorites



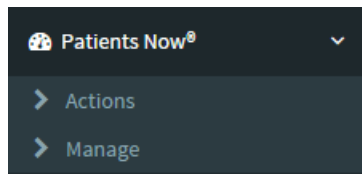
- i. Basically the “Home” screen

### 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®

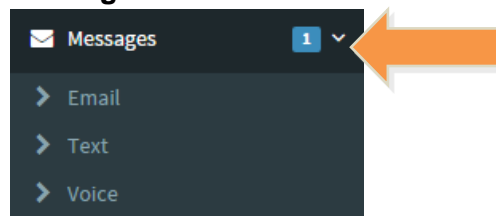


- i. This scheduling assist “app within the app” is a powerful tool that will identify your high potential revenue opportunities, and instantly find patients to fill holes in your schedule

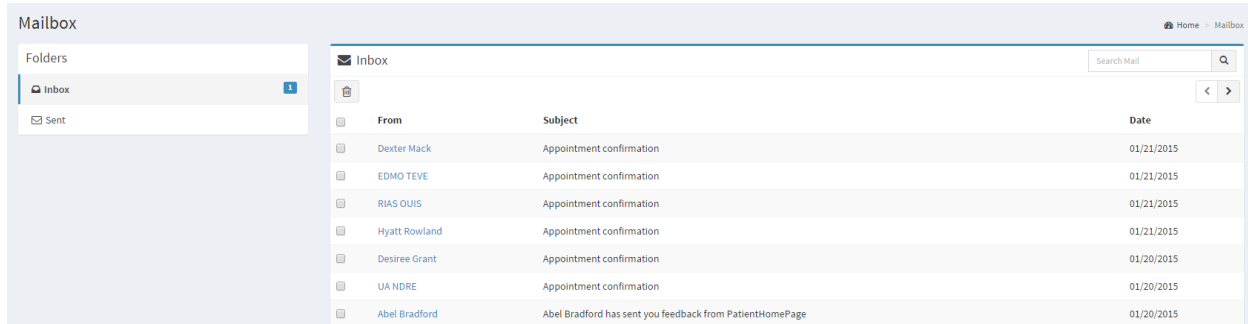
- i. Actions selection will open a menu of patient list categories; giving you the most eligible patients to fill those holes in your schedule, and instant opportunities to increase your revenue
- ii. Manage selection will open a screen enabling you to view your active and inactive Patients Now® campaigns, and view some key stats about each campaign

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

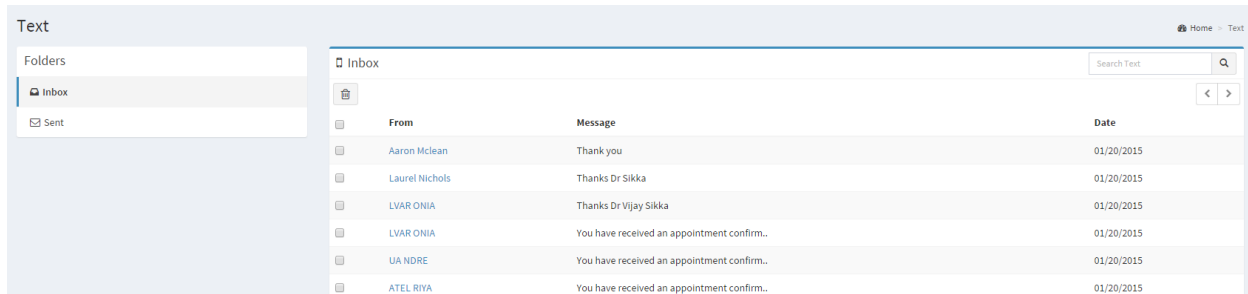
## d. Messages



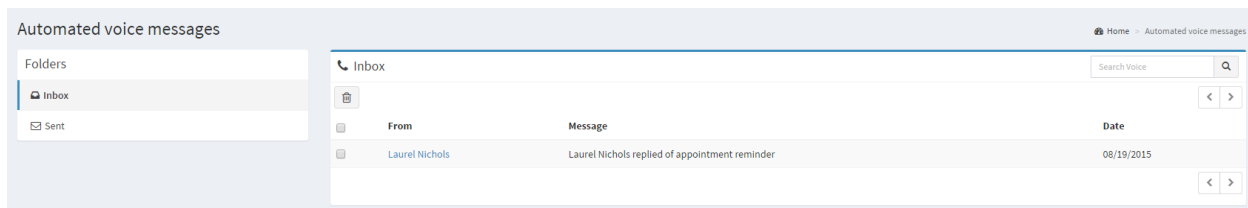
- i. The blue indicator will display how many messages are currently new/unread in your inboxes
- ii. Email selection will open your inbox, having tabs for both received and sent messages from and to patients via **PatientHomePage™**



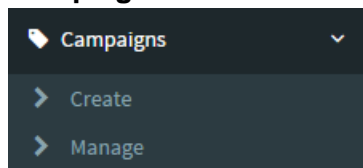
- iii. Text selection will open your inbox, having tabs for both received and sent messages from and to patients via **PateintHomePage™** campaigns



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



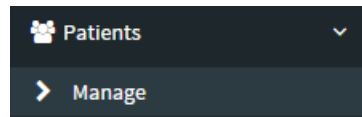
## e. Campaigns



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

The screenshot shows the 'Patients' management interface. On the left, the 'Add Patient Filter' panel is open, showing a 'By Practice' filter selected with a dropdown arrow and an 'Add' button. Below this, a checkbox for 'Demo Smile dental care' is checked, and a warning icon indicates 'Filters marked with \* are required filters'. On the right, a table displays '1191 Patients'. The table has columns for Patient ID, First Name, Last Name, Email, Phone, Status, Location, and Gender. The first few rows of the table are visible, showing patient details like Hedwig Acosta, Dorian Adams, and Phoebe Adams. Two large orange arrows point from the filter panel and the table towards the right, indicating the flow of interaction.

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

This screenshot shows the 'Add Patient Filter' dropdown menu. The menu is open, displaying a list of filter options: 'By Practice' (selected with a gear icon), 'By Patient Status', 'By Gender', 'By Age Range', 'By Location', and 'By Keyword'. The 'By Practice' option is highlighted in blue. The 'Add' button is visible to the right of the dropdown.

ii. The patient view will display the results after filtering

1191 Patients

✕ Demo Smile dental care

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	✉	1-3953	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

- It will show the total number of patients in the list
- It will show the active filters (which can be removed by simply clicking on the “x” in the green box)
- It will show the pertinent patient info such as: email address and phone number

## g. Settings

⚙ Settings

- 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

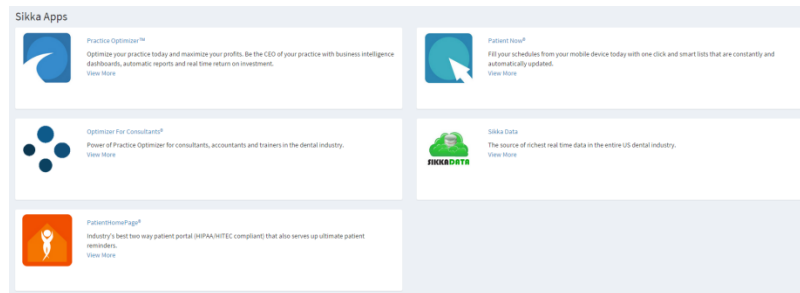
**Note:** To find out more about Settings right now go to [Section 7](#)

## h. Ecosystem

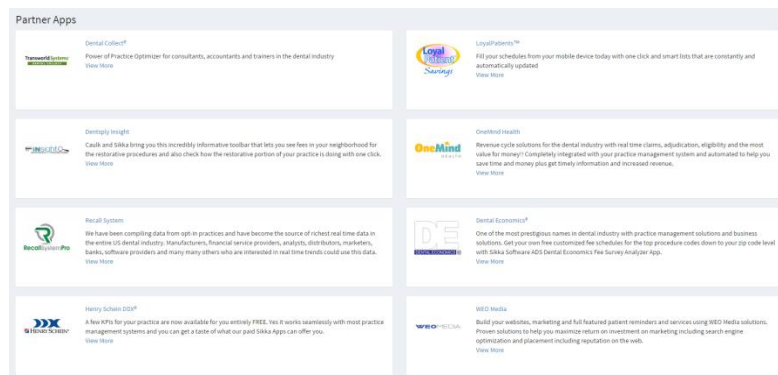
📁 EcoSystem

- 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

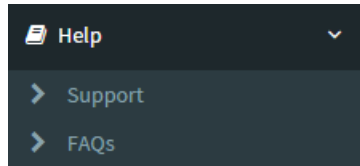


## ii. Partner Apps are all of the apps that were developed or co-developed by Sikka and our partners using our platform

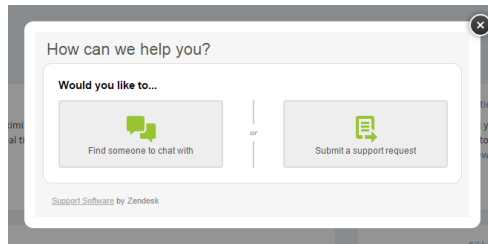


**Note:** All of these apps run off of the one Sikka Platform Cloud platform, and integrate with most practice management software

### 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 **PatientHomePage™**

## 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

**PatientHomePage™** Demo Smile dental care

**Patients Now®** Book more appointments and increase your revenue simply by following the tips below

Congratulations!  
We found 10 actions that can increase your appointments & revenue.

Action	Patients
Reactive inactive patients by offering an incentive to return	2744
Reward your top referrers	33
Reward the referrers who have sent you a patient in the last 6 months	6
Offer implants to patients who have had a partial denture made in the past 10 years	159
Offer invisalign to 25-45 year old patients	1783
Reach out to hygiene-only patients who have not come in for longer than 7 months	35
Reach out to patients who have had procedure 4341 but not 4910	304
Reach out to patients who have outstanding treatment plans and have remaining insurance benefits	138
Invite your patients to bring their family members to your practice	725
Offer a special (e.g. tooth whitening) to patients 50-65 years old	951

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

**PatientHomePage™** Demo Smile dental care

**Patients Now®** Book more appointments and increase your revenue simply by following the tips below

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

2744  
Eligible candidates\*

2740  
Eligible Email candidates\*

2740  
Eligible Text candidates\*

Add Patient Filter

By Practice  Add

☐ Demo Smile dental care

Selected Audience

Last Name	First Name	Middle Name	Last Appointment Date	Gender	DOB	Age	City	State	Zipcode	Phone Number	Cell Phone Number	Work Phone	Email Address	Added	First Visit	Last Visit	Patient Status	Patient ID	Primary Insurance ID	Primary Insurance Company	Secondary Insurance ID	Secondary Insurance Company
Cole	Samantha	X	2004-05-28	Male	1942-05-28	73	Ogden	Prince Edward Island	27208	1-634-340-3420	1-373-601-6011	1-236-542-6285	krin.dawar@sikkahealthcare.com	7507	2004-05-17	2004-05-17	Active	100001	148	Delta Dental	0	
William	Kyle	I	2004-05-28	Female	1939-05-28	75	North Pole	British Columbia	610	1-456-653-6530	1-205-601-6011	1-236-542-6285	krin.dawar@sikkahealthcare.com	4185	2004-05-17	2004-05-17	Active	100003	148	Delta Dental	0	
French	Woodard	J	2004-05-28	Female	1943-05-28	68	Chico	Georgia	1-401-451-0414	1-445-335-6338	1-261-496-2773	krin.dawar@sikkahealthcare.com	7507	2004-05-17	2004-05-17	Active	1001	0		0		



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

## **i 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, Location, and Keyword

Add Patient Filter

By Practice
+Add

By Patient Status  
By Practice  
By Gender  
By Age Range  
By Location  
By Keyword

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

Selected Audience

Search:

<input type="checkbox"/>	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	Patient ID	Primary Insurance ID	Primary Insurance Company	Secondary Insurance ID	Secondary Insurance Company
<input type="checkbox"/>	Cote	Samantha	X	2006-01-26T00:00:00	Male	1-Private	1943-05-29T00:00:00	73	Ogden	Prince Edward Island	27208	1-534-149-3420	1-373-818-1912	408-758-6501	1-136-942-6205	kiran.davekar@sikkaasoftware.com	7507 Ennis Road	2004-09-13T00:00:00	2009-01-30T00:00:00	Active	100001	148	Delta Dental	0	
<input type="checkbox"/>	William	Kylee	I	2006-01-29T00:00:00	Female	1-Private	1939-02-04T00:00:00	78	North Pole	British Columbia	010	1-469-683-8103	1-208-641-6939	408-758-8501	1-124-591-5083	kiran.davekar@sikkaasoftware.com	Ap #155-663 Mauris Av.	2009-05-18T00:00:00	2008-01-30T00:00:00	Active	100003	148	Delta Dental	0	
<input type="checkbox"/>	French	Winifred	J	2004-09-20T00:00:00	Female	1-Private	1948-06-03T00:00:00	66	Chico	Georgia		1-407-412-0484	1-445-196-6138	408-758-6501	1-391-498-1773	kiran.davekar@sikkaasoftware.com	740-7868 Diam Avenue	2001-04-29T00:00:00	2006-05-01T00:00:00	Active	1001	0		0	
<input type="checkbox"/>	Thompson	Zephania	L	2008-04-11T00:00:00	Female	1-Private	1963-02-04T00:00:00	51	Johnson City	NY	82627	1-385-892-2410	1-740-437-9431	408-758-6501	1-862-314-3996	kiran.davekar@sikkaasoftware.com	P.O. Box 762, 5009 Proin Street	2003-12-04T00:00:00	2009-11-17T00:00:00	Active	100101	228	Blue Cross	0	
<input type="checkbox"/>	Spence	Kath	X	2008-01-05T00:00:00	Female	1-Private	1958-04-10T00:00:00	58	Union City	Newfoundland and Lab	83223	1-873-262-2887	1-492-799-2326	408-758-6501	1-601-609-1760	kiran.davekar@sikkaasoftware.com	Ap #722-6682 Vale Av.	2004-11-24T00:00:00	2009-09-10T00:00:00	Active	100201	453	Delta Dental	0	

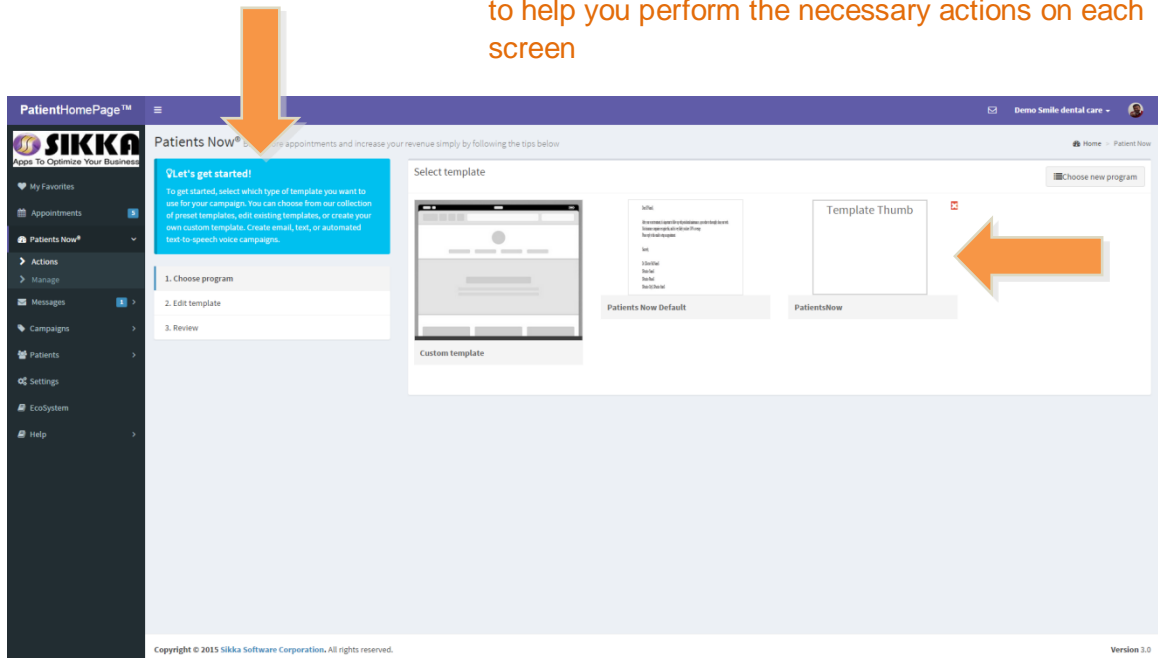
List of eligible candidates are valid as of today & may change over time based on selection criteria. Clicking invite will take you to the campaign section. You may track the performance of this campaign by going to Patients Now® > Performance reports.

[Download](#) [Invite](#) [Cancel](#)

- You can search for certain patients using the search box to the right
- 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
- You can sort the results by clicking on the heading for each column you want to sort by
- 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
- You can download the entire Selected Audience patient details report as an .csv by clicking on the blue Download button near the bottom left
- Clicking the Cancel button will take you back to the Action screen with the menu of patient list categories
- Clicking on the Invite button will take you to the Patients Now® template wizard

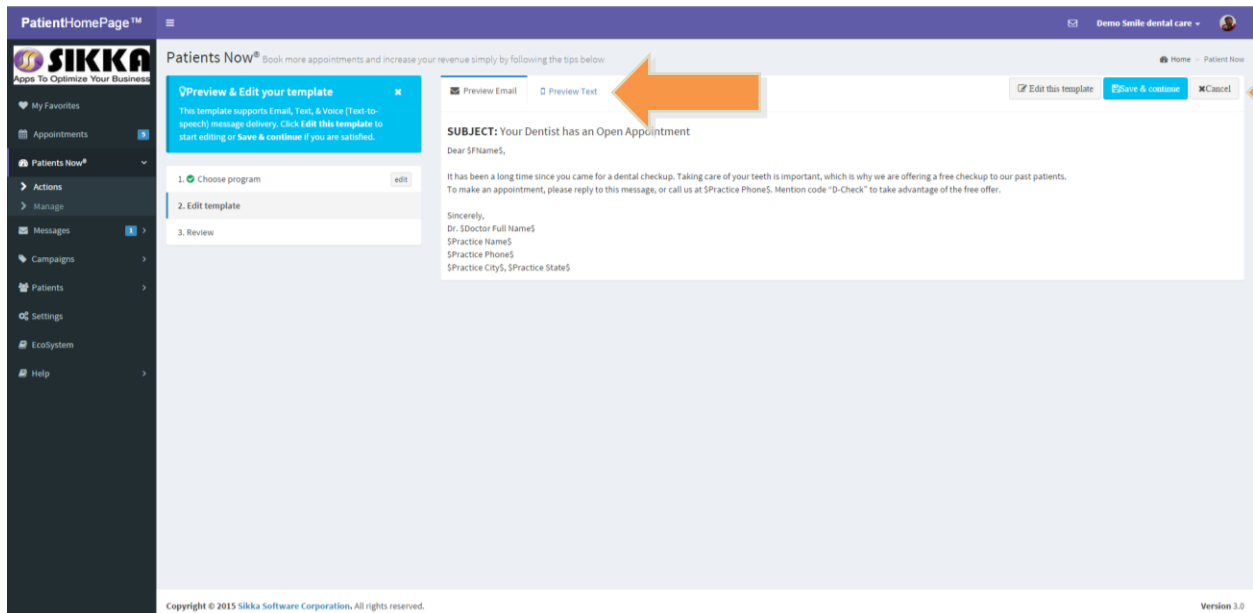
- a. First step will be for you to click on a template from the Select template window

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

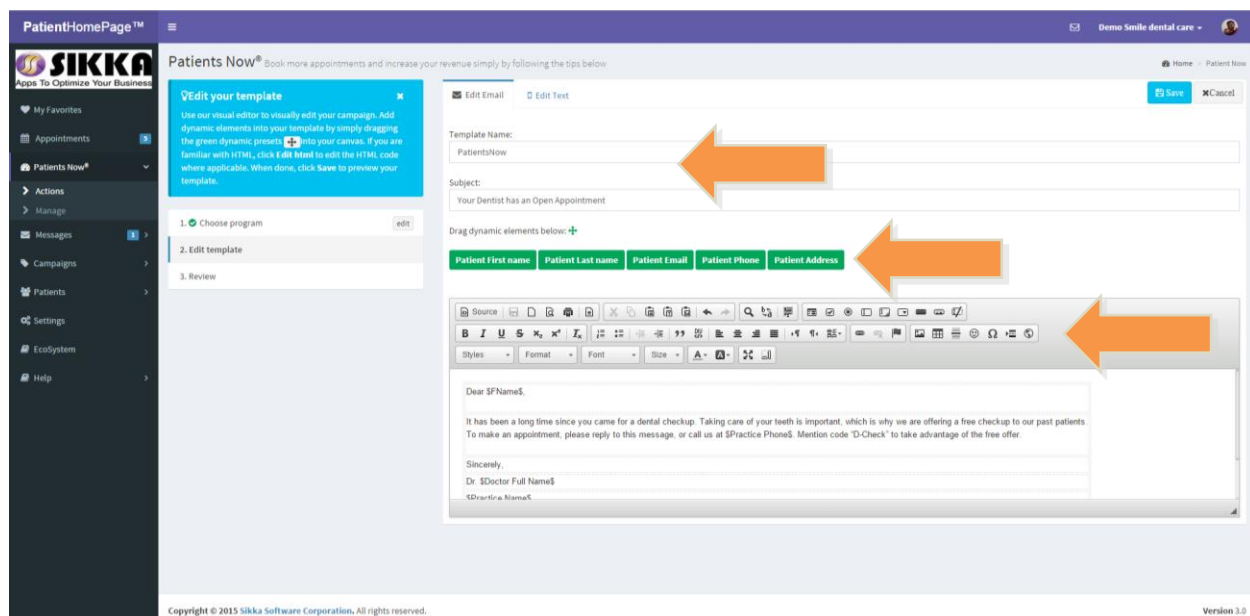


- b. Second step will be for you to edit the template for both the email and the text message

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

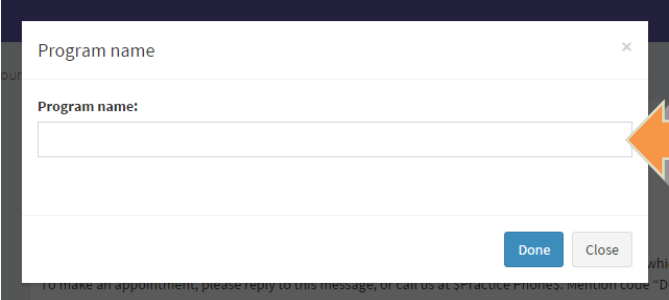


1. Preview Email tab will allow you to read the email that your patients will be receiving  
**Note:** Wherever you read \$...\$ in the body, that field will be replaced by actual data from your practice management software
2. Preview Text will allow you to read the text message that your patients will 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



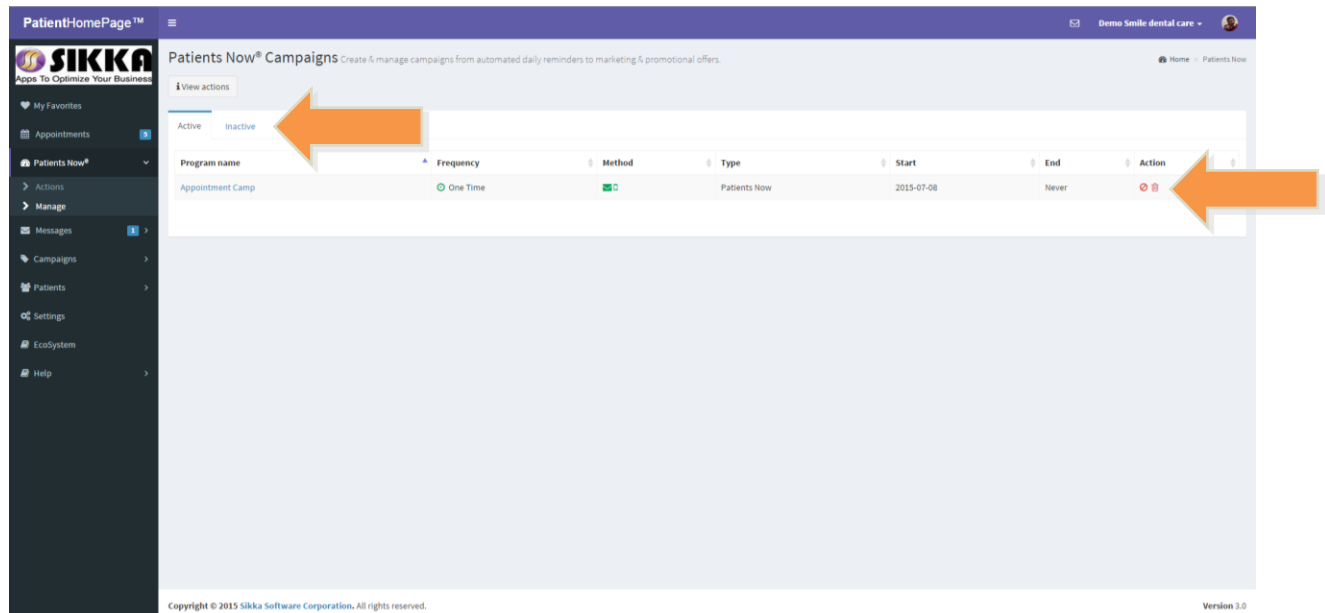
The screenshot shows a modal dialog box titled "Program name" with a close button (X) in the top right corner. Inside the dialog, there is a label "Program name:" followed by a text input field. An orange arrow points to the input field. At the bottom right of the dialog, there are two buttons: "Done" (in blue) and "Close" (in grey). Below the dialog, a portion of another message is visible, starting with "To make an appointment, please reply to this message, or call us at 312-616-7100. Mention code 'D'".

- 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

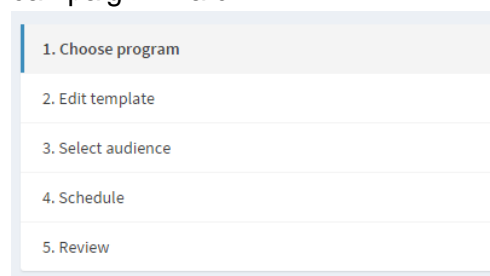
## 6. Using The PatientHomePage™ Campaigns

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

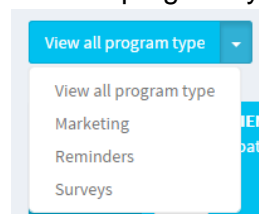
- Create selection opens the Create a campaign self-guided wizard to get you started using the most valuable benefit of **PatientHomePage™**



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



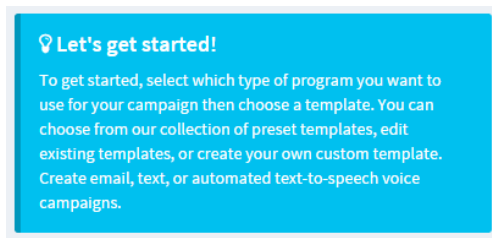
- View all program type will filter the program selection list by type



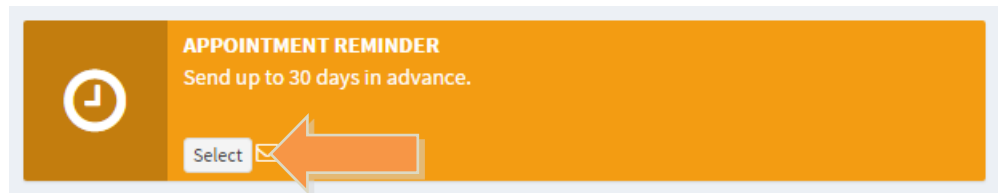


- iii. The program type boxes will display the name of each program, a description, how it can be sent to patients, what type it is, and a button to select it
  - i. Marketing = Blue
  - ii. Reminders = Yellow
  - iii. Surveys = Green

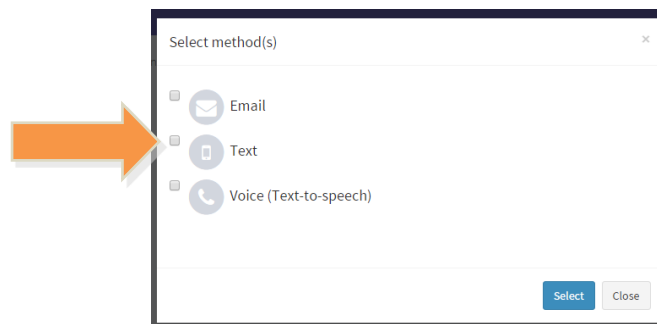
**Note:** The blue box in the upper left will display tips to help you perform the necessary actions on each screen



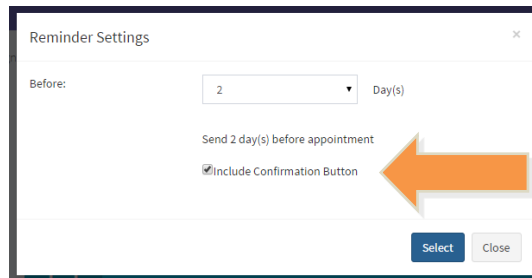
- iv. Step 1: Choose program by clicking the Select button in one of the programs listed on the right side of the page



- 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

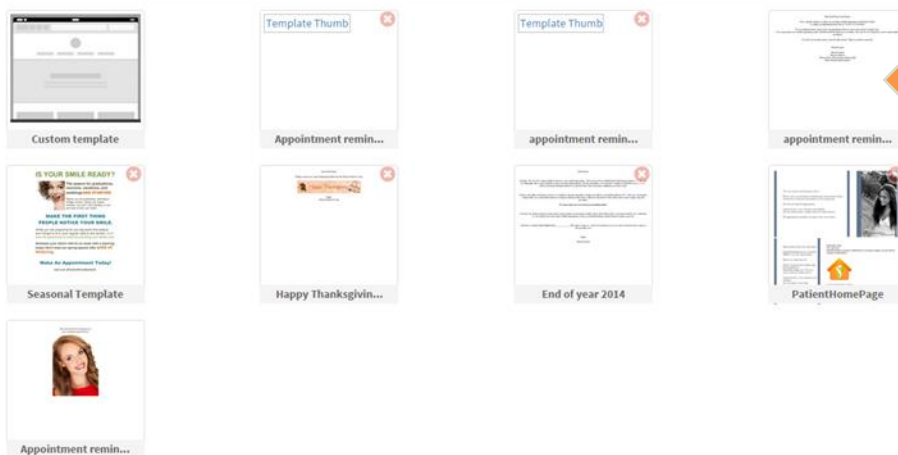


The image shows a 'Reminder Settings' dialog box. It has a 'Before:' label followed by a dropdown menu set to '2' and the text 'Day(s)'. Below this, it says 'Send 2 day(s) before appointment'. There is a checked checkbox labeled 'Include Confirmation Button'. At the bottom right, there are two buttons: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

**Create a campaign** Create custom and preset campaigns

**Preview & Edit your template**  
This template supports Email, Text, & Voice (Text-to-speech) message delivery. Click [Edit this template](#) to start editing or [Save & continue](#) if you are satisfied.

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

**Preview Email** Preview Text Preview Voice

**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\$

[Edit this template](#) [Save & continue](#) [Cancel](#)

**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

**Create a campaign** Create custom and preset campaigns

**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".

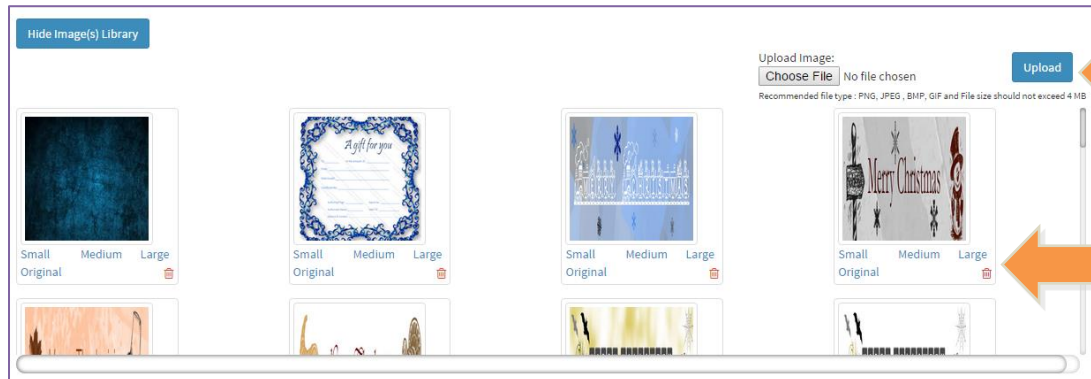
We are looking forward to seeing you for your appointment. Please be sure to arrive at least 10 minutes early.

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 PatientHomePage™ 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

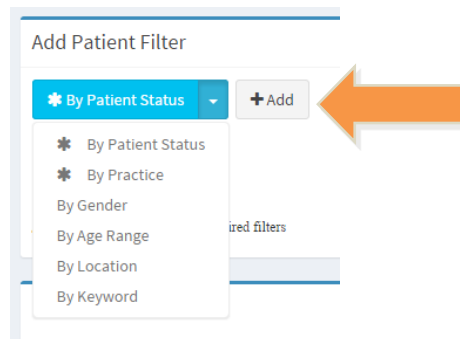
**Note:** Once everything has been edited to your satisfaction you can advance to Step 3: Select an audience in the campaign wizard

## 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

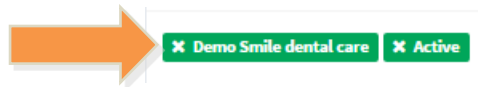
Note: The Status selections will come from your practice management software patient statuses



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

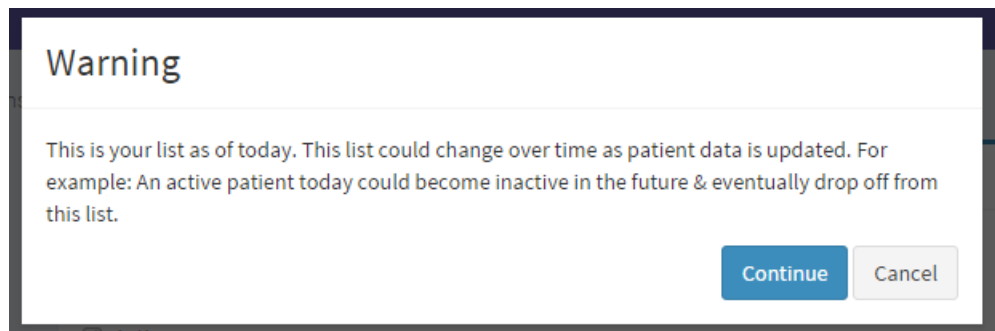
First name	Last name	Email	Phone	Status	Location	Gender
ALMA		✓ kiran.darekar@sikkasoftware.com	1-727-883-2219	Active	Chino, Ontario	
ANSA		✓ kiran.darekar@sikkasoftware.com	1-727-883-2219	Active	Chino, Ontario	
ARTI		✓ kiran.darekar@sikkasoftware.com	1-727-883-2219	Active	Chino, Ontario	
CADE		✓ kiran.darekar@sikkasoftware.com	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 screenshot of a web application dialog box titled "Program name" with a close button (X) in the top right corner. Inside the dialog, there is a label "Program name:" followed by a text input field. At the bottom right of the dialog, there are two buttons: "Done" (highlighted in blue) and "Close" (disabled, in light gray). The dialog is overlaid on a blurred background of the main application interface.

- 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)

Create a campaign Create custom and preset campaigns

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

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

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

Program name	Frequency	Method	Type	Start	End
Appt Reminders Test A	Daily	📧📞	Appointment reminders	2015-08-23	Never

5986 Patients as of today

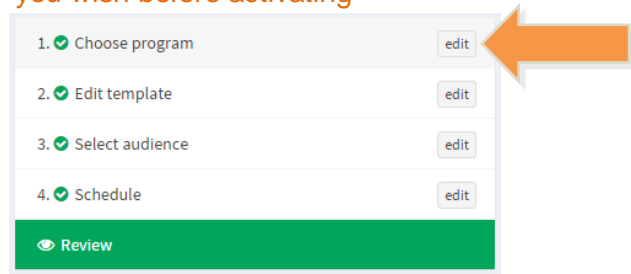
[Demo Smile Dental Care](#) [Action](#)

First name	Last name	Email	Phone	Status	Location	Gender
ALMA		<a href="#">✉ kiran.darekar@sikkasoftware.com</a>	1-727-883-2219	Active	Chino, Ontario	
ANSA		<a href="#">✉ kiran.darekar@sikkasoftware.com</a>	1-727-883-2219	Active	Chino, Ontario	
ARTI		<a href="#">✉ kiran.darekar@sikkasoftware.com</a>	1-727-883-2219	Active	Chino, Ontario	
CADE		<a href="#">✉ kiran.darekar@sikkasoftware.com</a>	1-727-883-2219	Active	Chino, Ontario	
CADE		<a href="#">✉ kiran.darekar@sikkasoftware.com</a>	1-727-883-2219	Active	Chino, Ontario	
CADE		<a href="#">✉ kiran.darekar@sikkasoftware.com</a>	1-727-883-2219	Active	Chino, Ontario	
CADE		<a href="#">✉ kiran.darekar@sikkasoftware.com</a>	1-727-883-2219	Active	Chino, Ontario	
CADE		<a href="#">✉ kiran.darekar@sikkasoftware.com</a>	1-727-883-2219	Active	Chino, Ontario	

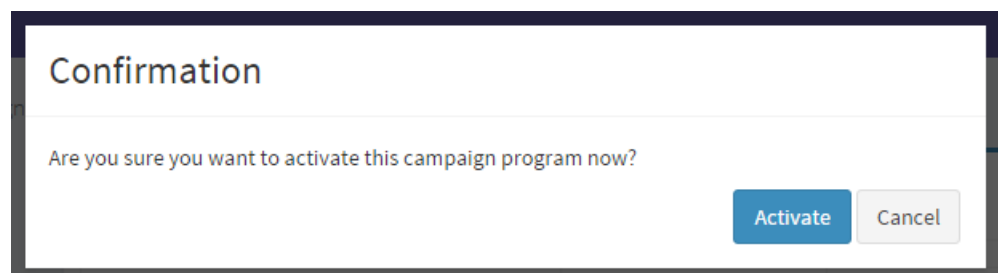
- b. You can once again review the patients in your send list
- c. You can also preview the email and text content one more time

- 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 **PatientHomePage™** 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

1 Campaign details

Performance Report

Appt Reminders Test A details

[Edit](#)
[Deactivate](#)
[Delete](#)

FREQUENCY

Daily

METHOD

08/23/2015

DURATION

08/23/2015

Never

STATUS

ACTIVE

5986 Patients as of today

[View table download csv](#)
[Active](#)

First name	Last name	Email	Phone	Status	Location	Gender
ALMA		kiran.darekar@skkasoftware.com	1-727-683-2219	Active	Chino, Ontario	
ANSA		kiran.darekar@skkasoftware.com	1-727-683-2219	Active	Chino, Ontario	
ARTI		kiran.darekar@skkasoftware.com	1-727-683-2219	Active	Chino, Ontario	
CADE		kiran.darekar@skkasoftware.com	1-727-683-2219	Active	Chino, Ontario	
CADE		kiran.darekar@skkasoftware.com	1-727-683-2219	Active	Chino, Ontario	
CADE		kiran.darekar@skkasoftware.com	1-727-683-2219	Active	Chino, Ontario	

[Previous Email](#)
[Preview text](#)
[Preview Voice](#)

SUBJECT: appointment reminders default

Hello {FirstName}{LastName},

- 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

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

**Manage campaigns**

- Campaign details
- Performance Report

**Appt Reminders Test A performance**

TOTAL SENT 0 since 08/23/2015	LAST SENT since 08/23/2015	TOTAL REPLY 0 since 08/23/2015	METHOD Email, Text, Voice since 08/23/2015
-------------------------------------	-------------------------------	--------------------------------------	--

< Jump to date > Clear

**Recipients**

Email		na
Text		na
Voice		na

**Open**

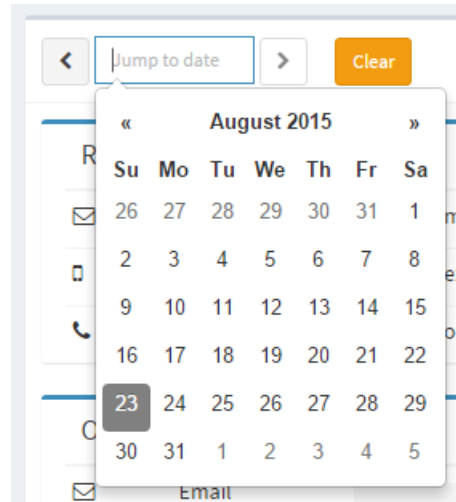
Email		na	na
Text		na	na
Voice		na	na

**Reply**

Email		na	na
Text		na	na
Voice		na	na

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 **PatientHomePage™** 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

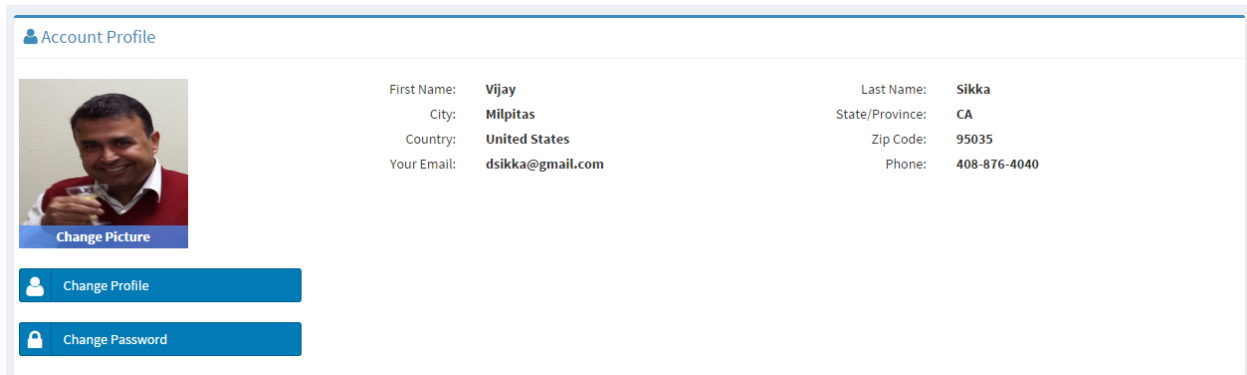
**Note:** The Inactive campaigns screen will function exactly like the Active campaigns screen



## 7. Setting Up Your PatientHomePage™ Account

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

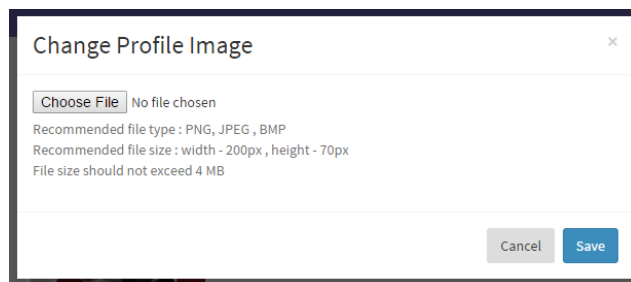
### a. Account Profile



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 form with the following fields and values:

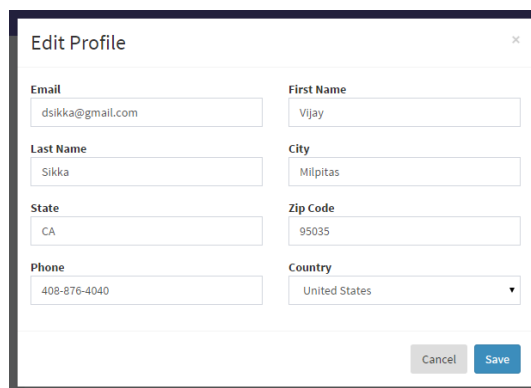
Field	Value
First Name	Vijay
City	Milpitas
Country	United States
Your Email	dsikka@gmail.com
Last Name	Sikka
State/Province	CA
Zip Code	95035
Phone	408-876-4040

- 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 the recommended file type (PNG, JPEG, BMP), the recommended file size (width - 200px, height - 70px), and the maximum file size (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



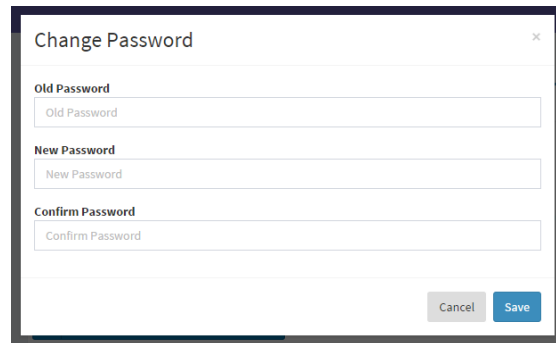
The screenshot shows an 'Edit Profile' dialog box. It contains several input fields for editing the user's profile information:

Field	Value
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



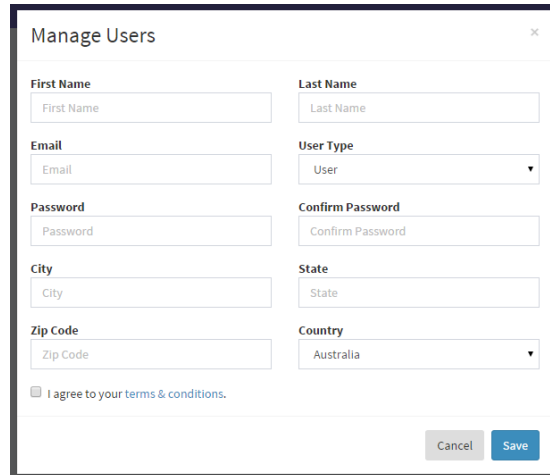
A modal dialog box titled "Change Password" with a close button (X) in the top right corner. It contains three input fields: "Old Password", "New Password", and "Confirm Password". At the bottom right, there are two buttons: "Cancel" and "Save".

## 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

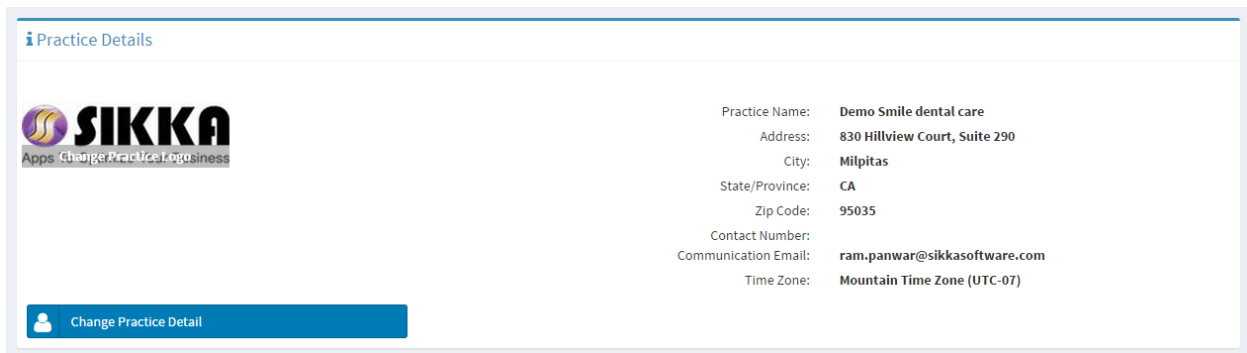


The 'Manage Users' form is a modal window with a close button (X) in the top right corner. It contains the following fields and controls:

- First Name:** Text input field.
- Last Name:** Text input field.
- Email:** Text input field.
- User Type:** Dropdown menu with 'User' selected.
- Password:** Text input field.
- Confirm Password:** Text input field.
- City:** Text input field.
- State:** Text input field.
- Zip Code:** Text input field.
- 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



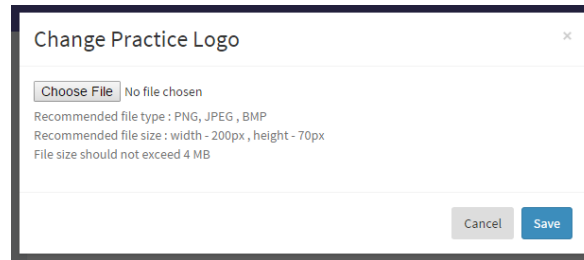
The 'Practice Details' page shows the following information:

- 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:
  - 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

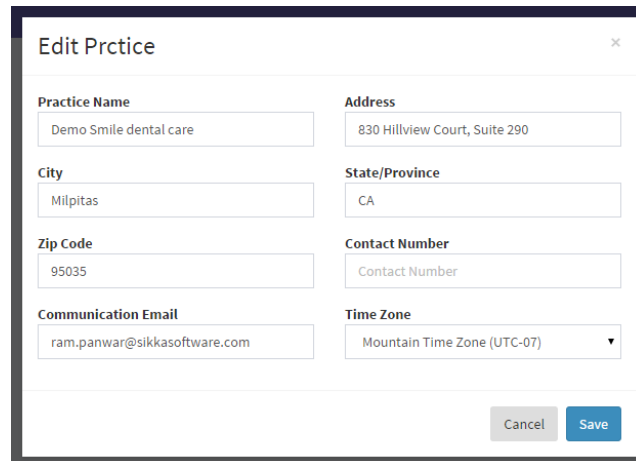
**Note:** The recommended logo should be PNG, JPEG, or BMP, and 200px width – 70px height, and smaller than 4MB in size

**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 the following instructions: "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:
 

- Practice Name:** Demo Smile dental care
- Address:** 830 Hillview Court, Suite 290
- City:** Milpitas
- State/Province:** CA
- Zip Code:** 95035
- Contact Number:** Contact Number
- Communication Email:** ram.panwar@sikkasoftware.com
- Time Zone:** Mountain Time Zone (UTC-07) (dropdown menu)

 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: \$n ▼

Negative currency format: (\$n) ▼

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 **PatientHomePage™**
- 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 **PatientHomePage™**
- 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 **PatientHomePage™** service is on/off, and the date services were started

## g. Reports

**Reports**

**Campaigns / ROI report**  
I would like to receive PatientHomePage campaigns/ROI report

☐ Weekly
 ☐ Monthly
 ☒ Both(Weekly,Monthly)
 ☐ None

**Confirmed / not responded appointment reminders report**  
Everyday I would like to receive a list of patients who have confirmed / not responded to appointment reminders

same day ▼

**Automated campaigns settings**  
I would like to send scheduled automated campaigns on

☐ Sunday
 ☒ Monday
 ☒ Tuesday
 ☒ Wednesday
 ☒ Thursday
 ☐ Friday
 ☒ Saturday

Save

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

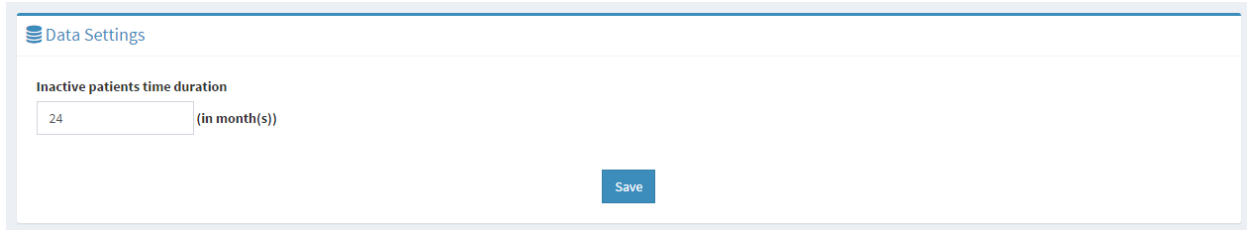
☐ Do not display Insurance Claims to patients on PatientHomepage

☐ Do not display Statements to patients on PatientHomepage

Save

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

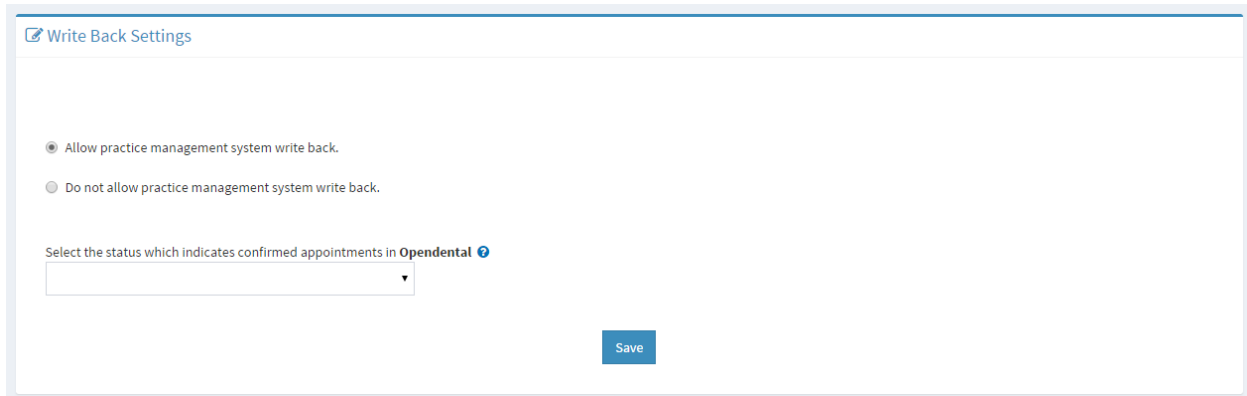
### j. Data Settings



- 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

##### 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.sikkasoftware.com/PrWebsiteAR.aspx?mid=0c1B0KbZ6qw=" frameborder="0" allowfullscreen=""/>
```

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.sikkasoftware.com/PrWebsiteAR.aspx?mid=0c1B0KbZ6qw=" 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:

Demo Smile dental care

▼

Reason to visit:

-- Any Procedure --

▼

Date:

US

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=0cLB0KBz6qw=" frameborder="0" allowfullscreen></iframe>
```

OR

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

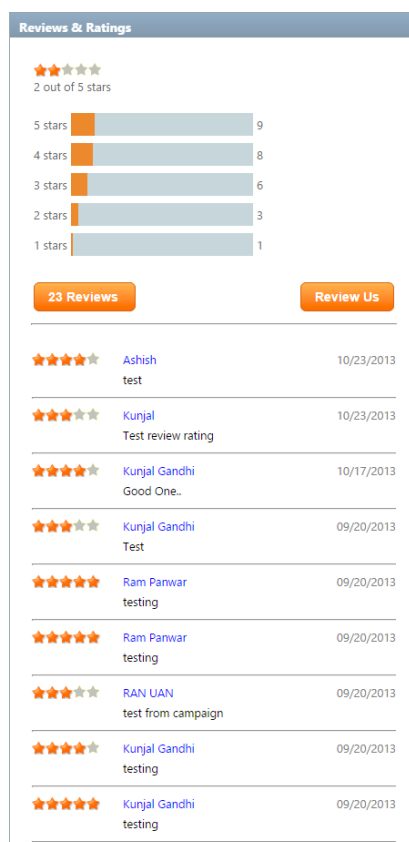
Click on the button to start a reviews & ratings.



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=0cLB0KBz6qw=" 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

**Review Us** X

Name:

Email:

Practice Name: Demo Smile dental care ▼

Rating: ★ ★ ★ ★ ★

Review:

**Submit** **Cancel**

Note: Reviews are emailed directly to your email address, and your **PatientHomePage™** 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 **PatientHomePage™** 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

#### 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.sikkasoft.com/PrWebsiteSignUp.aspx?mid=0CLB0KBz6qw=" 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.sikkasoft.com/PrWebsiteSignUp.aspx?mid=0CLB0KBz6qw=" target="_blank" style="text-decoration:none;"></a>
```

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

Create an Account

Practice Name: Demo Smile dental care

Email:\*

Confirm Email: \*

Password:\*

Confirm Password:\*

First Name:\*

Last Name:\*

Phone Number:\*

Email Verify Code:

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

Send Verification Code

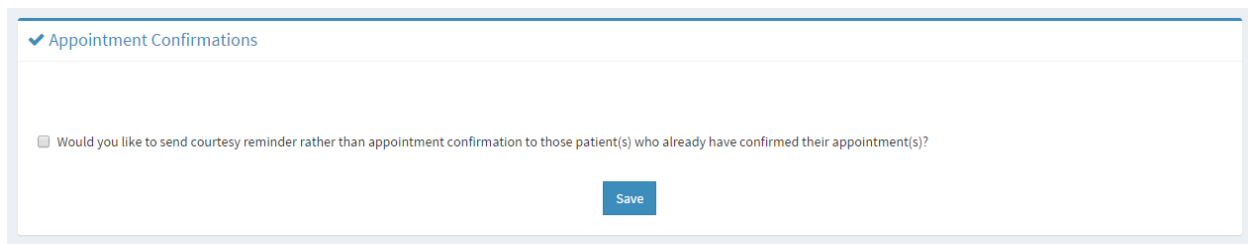
Reset

Note: Create an account with email id which you have shared with your provider, if it is possible.

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

### m. Appointment Confirmations



The screenshot shows a web interface for 'Appointment Confirmations'. At the top, there is a header with a checkmark icon and the text 'Appointment Confirmations'. Below this, there is a large white rectangular area containing a checkbox and the text 'Would you like to send courtesy reminder rather than appointment confirmation to those patient(s) who already have confirmed their appointment(s)?'. At the bottom right of this area is a blue button labeled 'Save'.

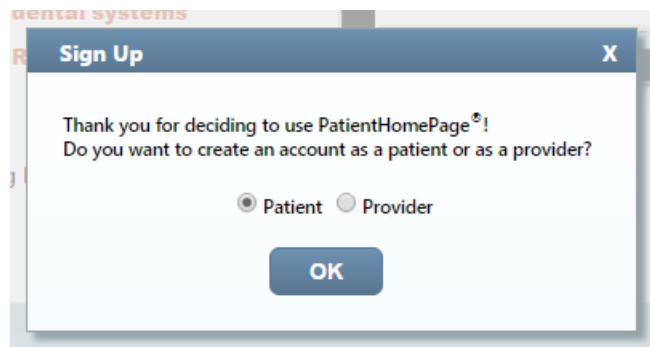
- i. Clicking on the box will setup a logic that if a patient has already confirmed an appointment reminder, then PatientHomePage™ will not include the confirm button again in subsequent reminders – they will be courtesy reminders only

## 8. Signing Up for a PatientHomePage™ 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 to the terms, and click “Submit” button

**Create an Account**

Email:

Confirm Email:

Password:

Confirm Password:

First Name:

Last Name:

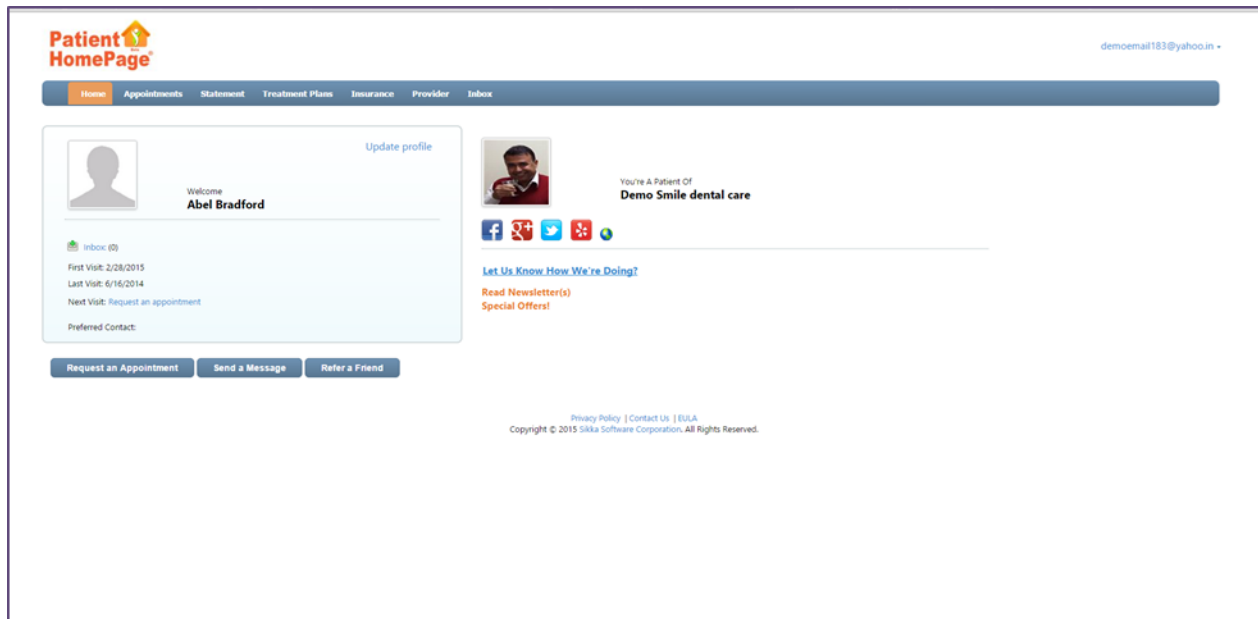
Phone Number:

☐ 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 **PatientHomePage™** account

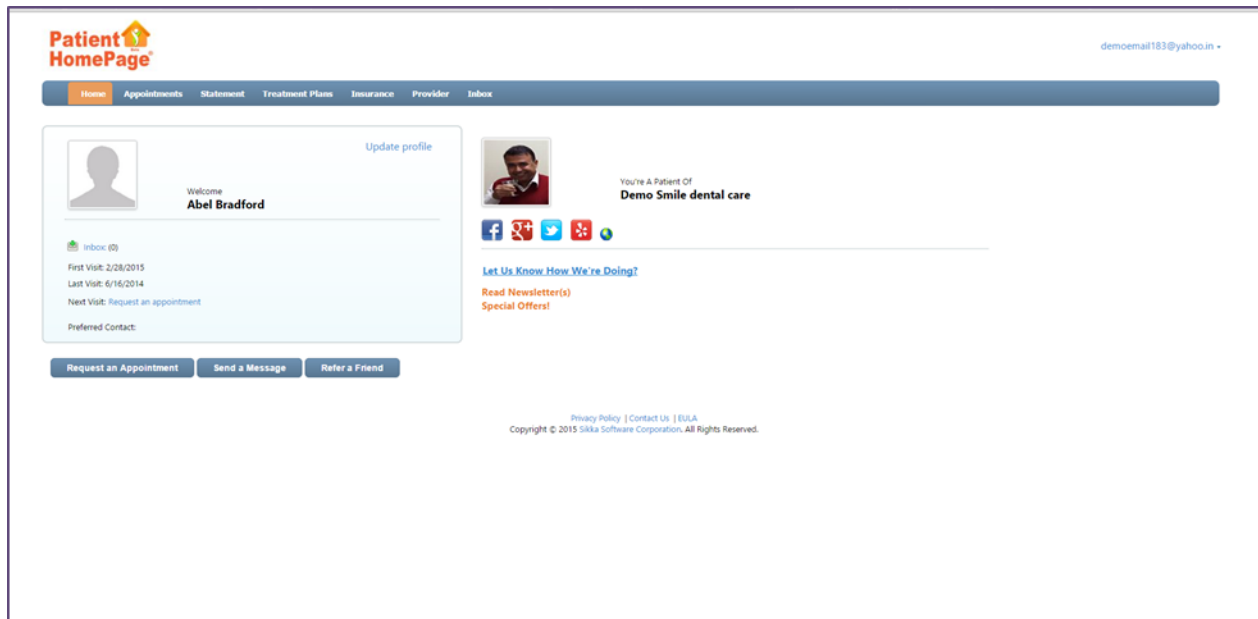
### 9. Signing In To PatientHomePage™ Provider Account

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







### 10. Navigating the PatientHomePage™ 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

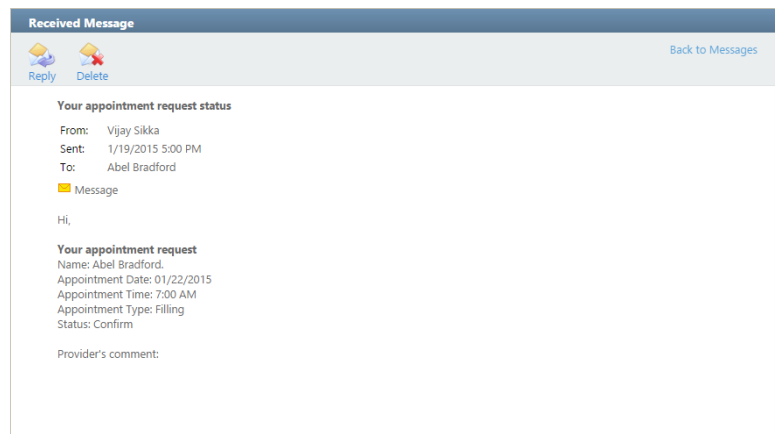


## i. Email ID

- 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™**

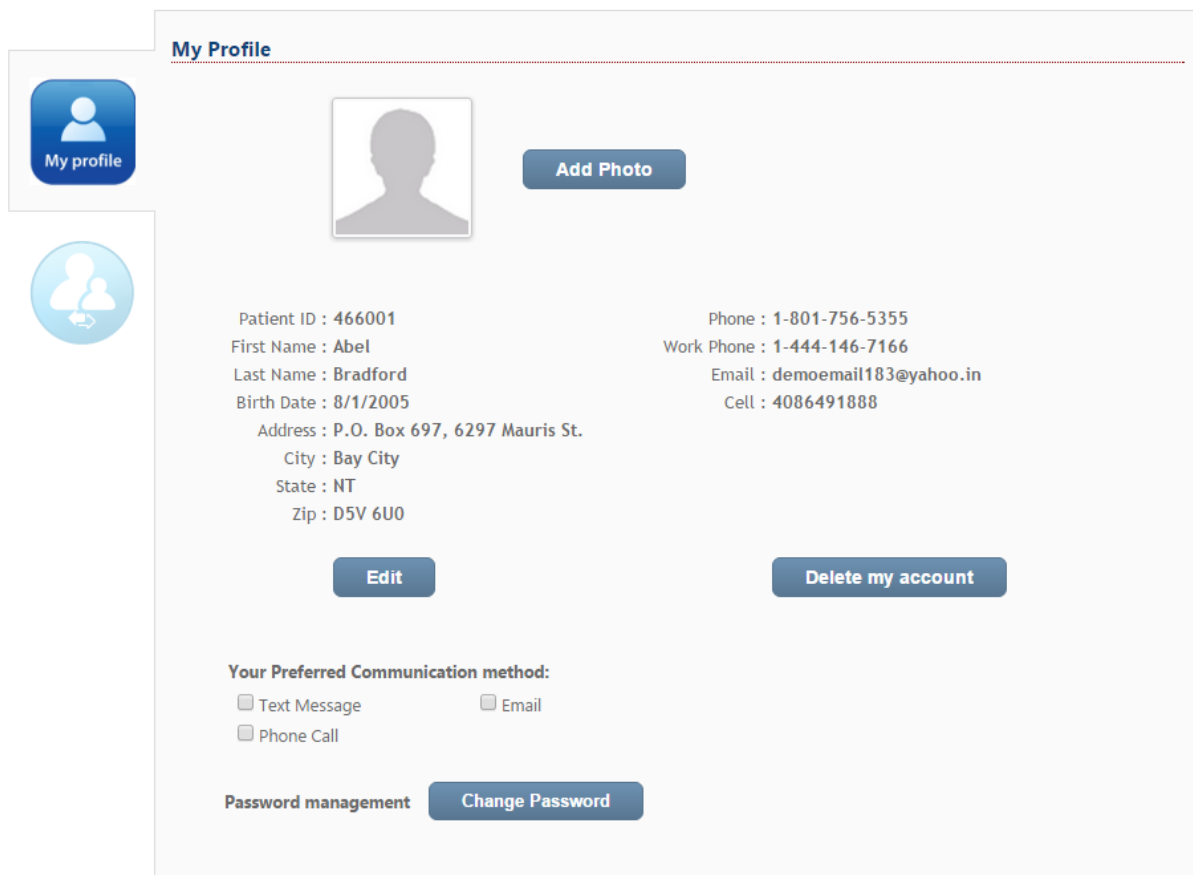
Inbox Sent Mail				
 Delete  Compose				
All	From	Subject	Date	
<input type="checkbox"/>	Vijay Sikka	Your appointment request status	1/19/2015 5:00 PM	
<input type="checkbox"/>	Vijay Sikka	Happy Birthday from your dentist	7/30/2015 5:00 PM	

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

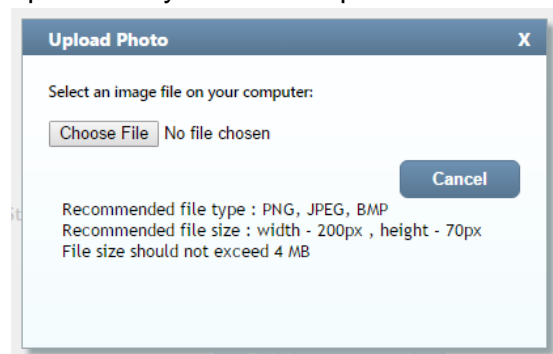
**Edit** **Delete my account**

**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

**Edit Profile**

First Name:  Phone:

Last Name:  Work Phone:

Birth Date:  Cell:   
MM/DD/YYYY

Address:

City:

State:

Zip:

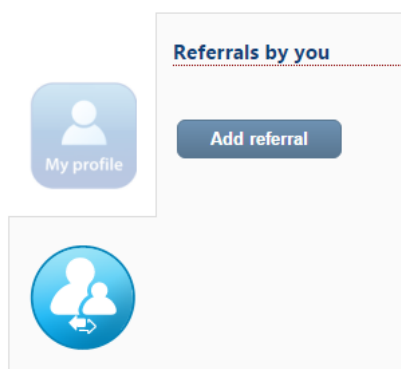
- You can select how you would like to receive communications from your provider ( email, text, phone)

**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



**Add Referral**

The information about your referral that you enter here will be sent to your dentist.

First Name:

Last Name:

Phone Number:

Email Address:

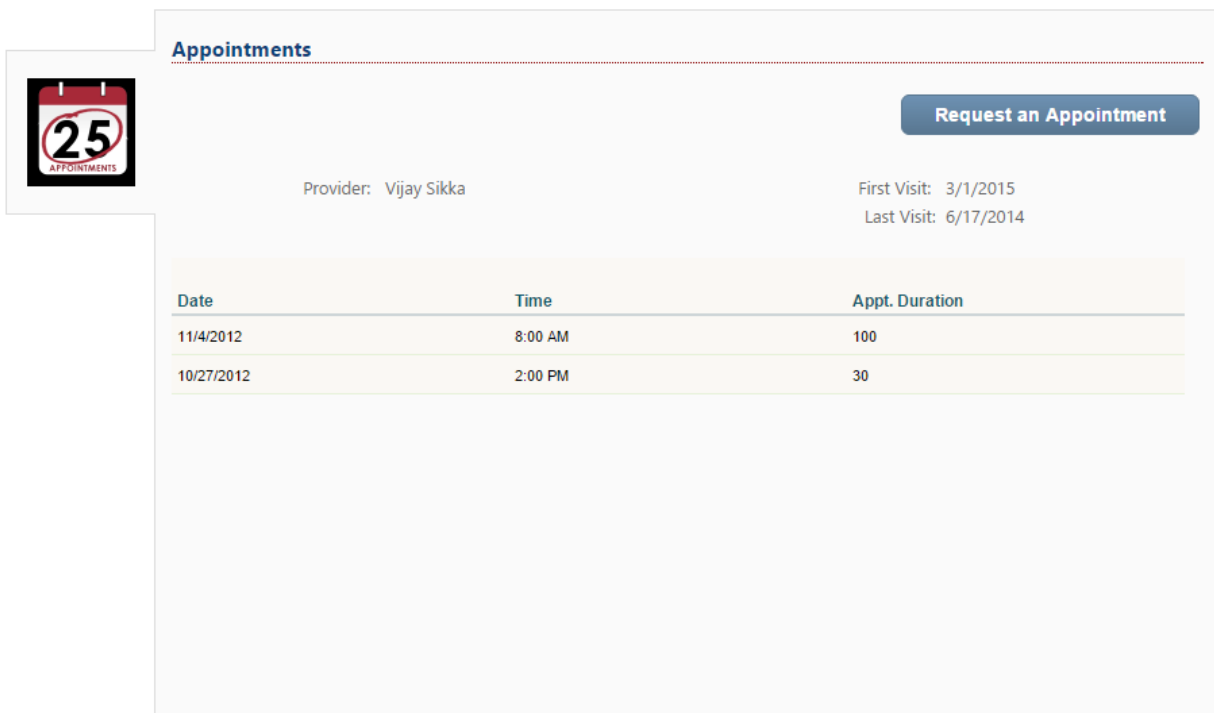
Your Comments:

## 11. Using the PatientHomePage™ Navigation Menu Elements

### i. Home

i. Clicking “Home” will display the Home screen

### ii. Appointments



**Appointments**

[Request an Appointment](#)

Provider: Vijay Sikka

First Visit: 3/1/2015  
Last Visit: 6/17/2014



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



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

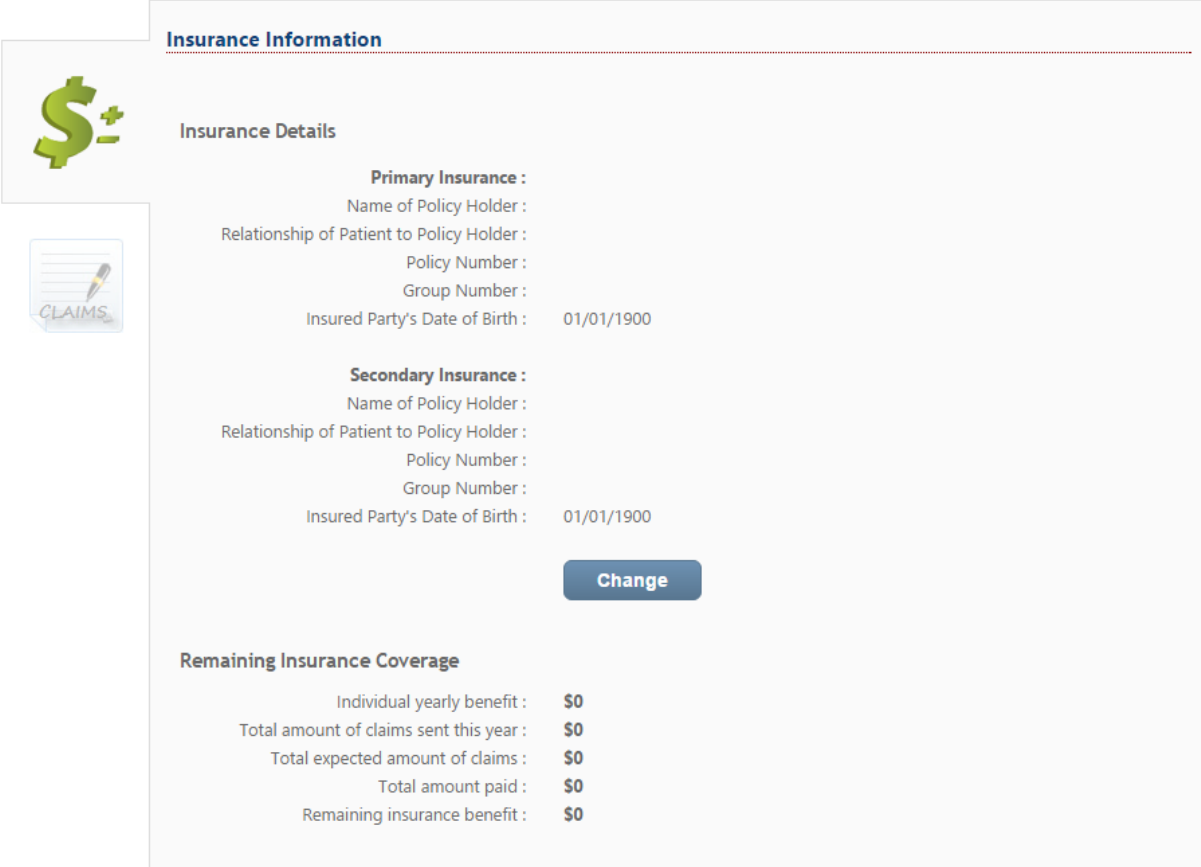
<p>Name : <b>Abel Bradford</b></p> <p>Address : P.O. Box 697, 6297 Mauris St.</p> <p>City : Bay City</p> <p>State/Zip : NT D5V 6U0</p> <p>Phone : 1-801-756-5355</p>	<p>Practice Name : <b>Demo Smile dental care</b></p> <p>Address : 830 Hillview Court, Suite 290</p> <p>City : Milpitas</p> <p>State/Zip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



The screenshot displays the 'Insurance Information' section of a patient's online portal. On the left, there is a sidebar with a green dollar sign icon and a 'CLAIMS' button. The main content area is titled 'Insurance Information' and contains two sections: 'Insurance Details' and 'Remaining Insurance Coverage'. The 'Insurance Details' section is divided into 'Primary Insurance' and 'Secondary Insurance' fields. Each field contains labels for 'Name of Policy Holder', 'Relationship of Patient to Policy Holder', 'Policy Number', 'Group Number', and 'Insured Party's Date of Birth'. The 'Insured Party's Date of Birth' is pre-filled with '01/01/1900'. A 'Change' button is located below the 'Secondary Insurance' section. The 'Remaining Insurance Coverage' section lists five items, all with a value of '\$0': 'Individual yearly benefit', 'Total amount of claims sent this year', 'Total expected amount of claims', 'Total amount paid', and 'Remaining insurance benefit'.

Insurance Information	
<b>Insurance Details</b>	
<b>Primary Insurance :</b>	
Name of Policy Holder :	
Relationship of Patient to Policy Holder :	
Policy Number :	
Group Number :	
Insured Party's Date of Birth :	01/01/1900
<b>Secondary Insurance :</b>	
Name of Policy Holder :	
Relationship of Patient to Policy Holder :	
Policy Number :	
Group Number :	
Insured Party's Date of Birth :	01/01/1900
<a href="#">Change</a>	
<b>Remaining Insurance Coverage</b>	
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:

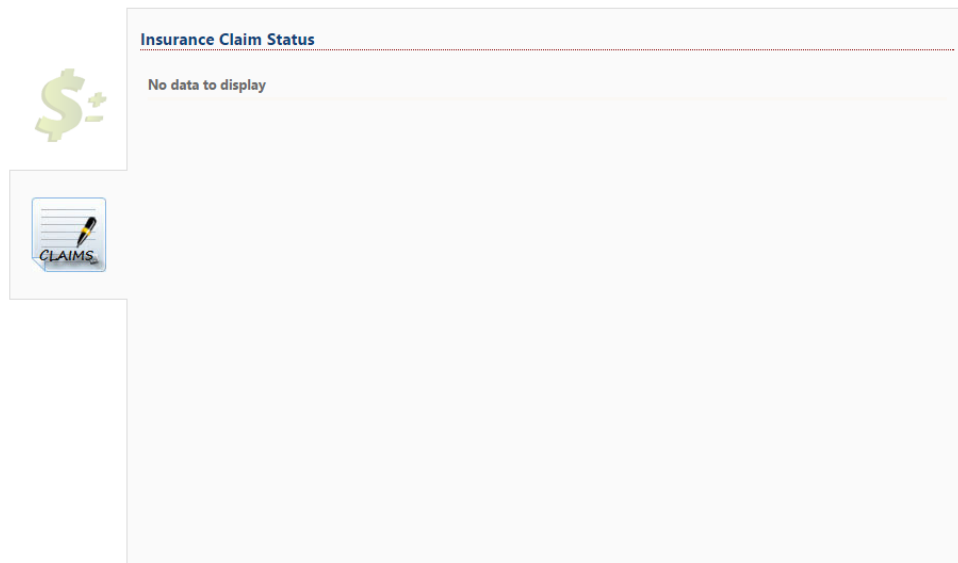
Group Number:

Insured Party's Date of Birth:  01/01/1900

mm/dd/yyyy

- 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



<b>Provider Name:</b>	<b>Vijay Sikka</b>
Practice Name:	Demo Smile dental care
Address:	830 Hillview Court, Suite 290
City:	Milpitas
State:	CA
Phone:	
Email:	ram.panwar@sikkasoftware.com
Website:	<a href="http://www.sikkasoft.com">http://www.sikkasoft.com</a>

**Please Add provider.**  
Enter provider's Name, Zip, City, State to search.

Specialty :

Search :   [How to add provider ?](#)

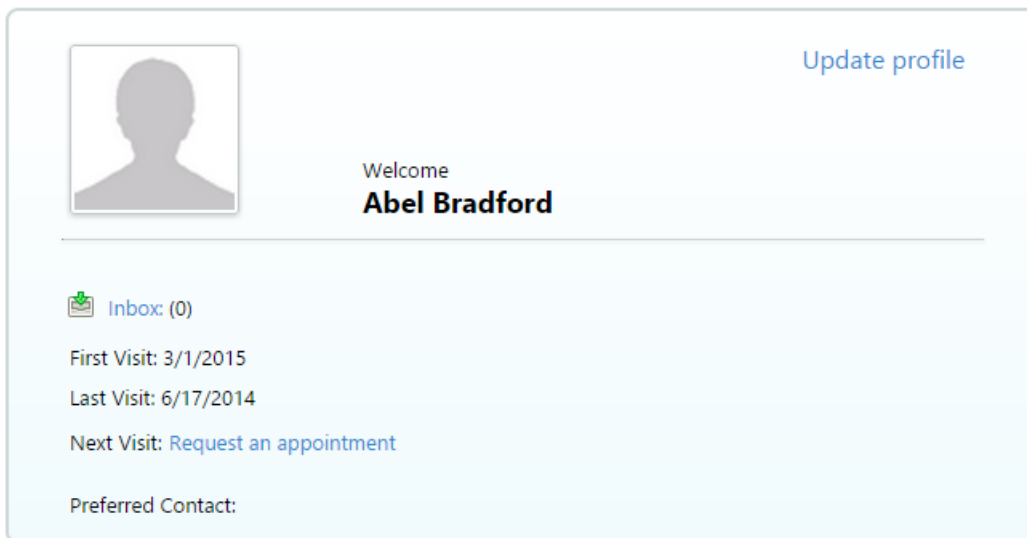
- ii. You can add a provider by choosing a specialty and searching the Sikka network of over 13,000 providers  
**Note:** There’s also a link “How to add provider?” which will walk you through how to add a provider to your **PatientHomePage™** account

vii. Inbox

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

ii. Profile

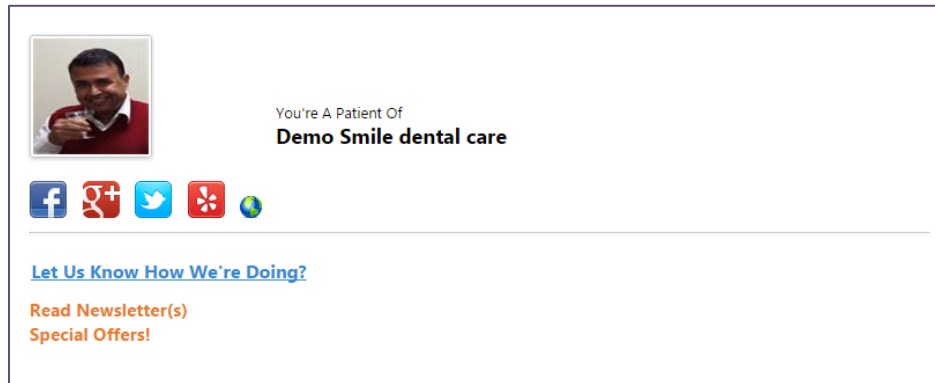
- i. Your profile section will display your profile details: name, number of new/unread emails in your inbox, first and last visit date to your provider, next visit date, and preferred contact method



- 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

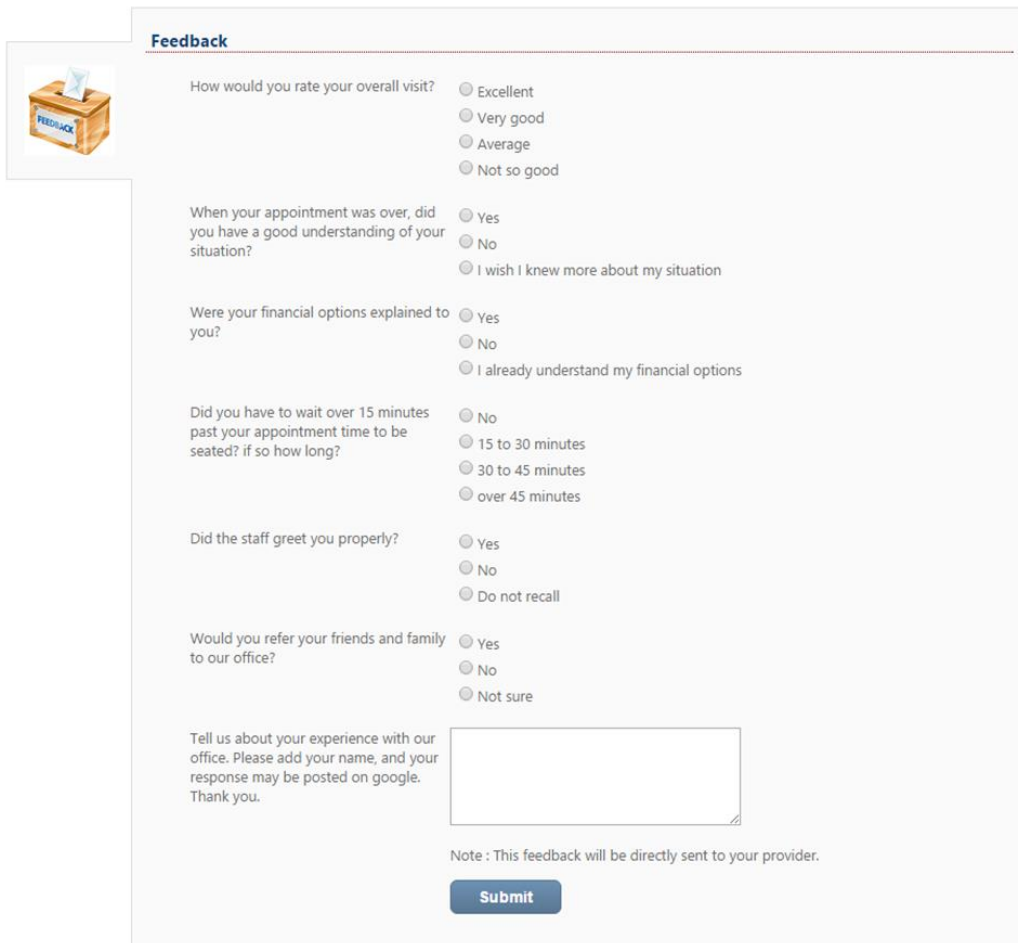


- iii. The website icon link will take you to your provider's website



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





The feedback form is titled "Feedback" and features a small icon of a wooden ballot box with a blue envelope slot and the word "FEEDBACK" on it. The form contains several questions with radio button options:

- 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**

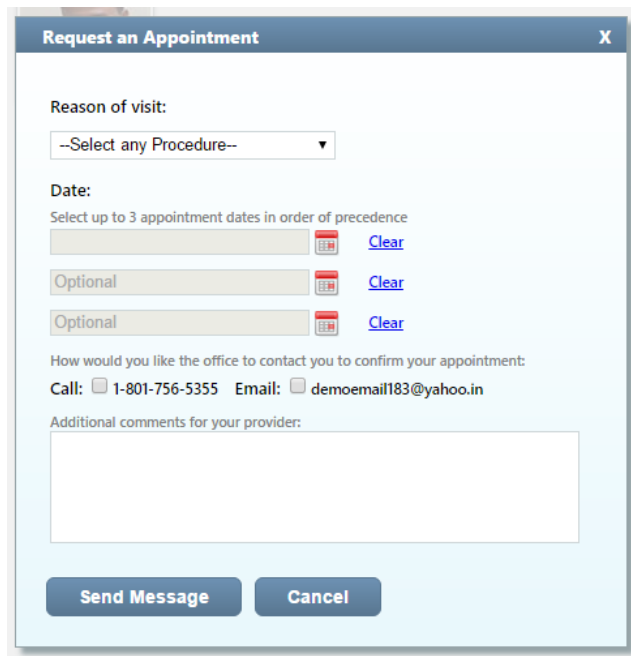
- i. Clicking the “Submit” button will send your results directly to your provider

**Note:** This will not post online anywhere

- 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 **PatientHomePage™**
- 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 **PatientHomePage™**

## 12. Request an Appointment

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

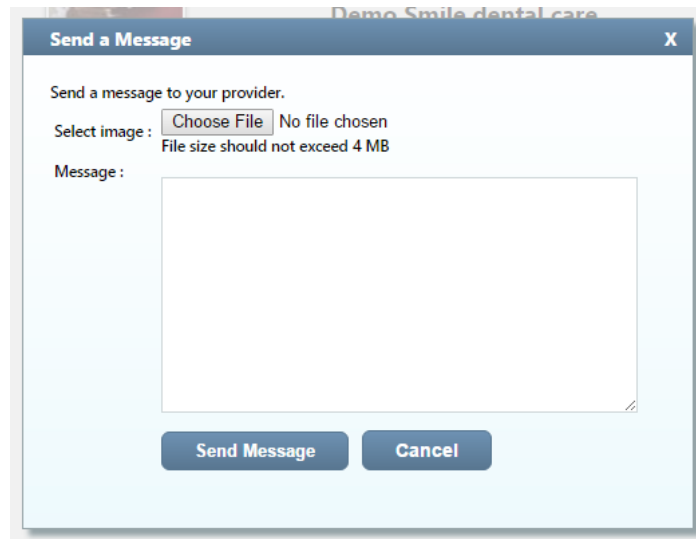


- i. You can select from a list of procedures for your Reason of visit
- ii. You can choose up to 3 dates for your preferred appointment time by clicking on the red calendar icon next to each date field
  - a. Clicking “Clear” will remove the selected date  
**Note: These times will be considered as 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

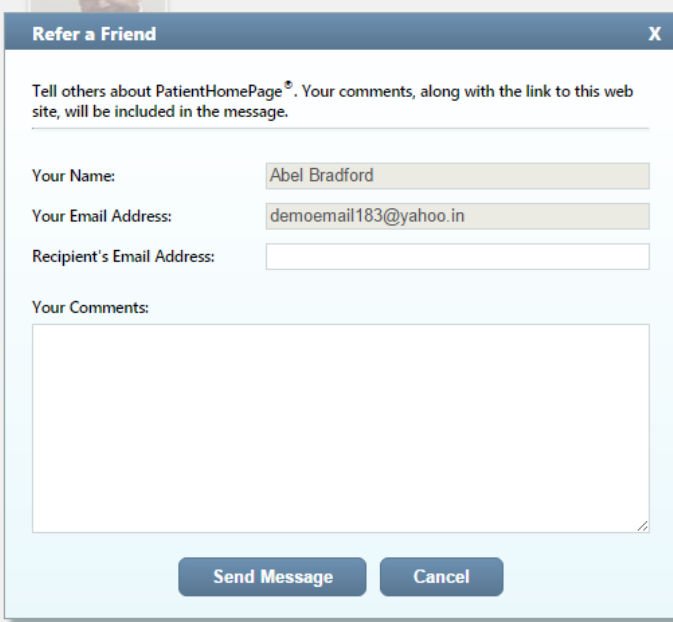
- i. Clicking the “Send a Message” button will open the Send a Message window



- 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 text: "Tell others about PatientHomePage®. Your comments, along with the link to this web site, will be included in the message." Below this are four input fields: "Your Name:" with the text "Abel Bradford", "Your Email Address:" with the text "demoemail183@yahoo.in", "Recipient's Email Address:" which is empty, and "Your Comments:" which is a large empty text area. 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 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