DRAMeRS

Instructions for sending Patient Information on Exact

Set Up and Options

- First set up an email template in Exact
- This message can either be the text of the study's "Welcome message" or your own message.
- If you choose your own message, both the study's "Welcome message" and the patient information sheet should be included **as attachments**
- If you use the "Welcome message" as the text of your email, simply include the patient information sheet as an attachment.

Make sure that the documents to be included as attachments have been saved **to the PC that you are working from** – not somewhere else on the network. Here, they are saved to the desktop.
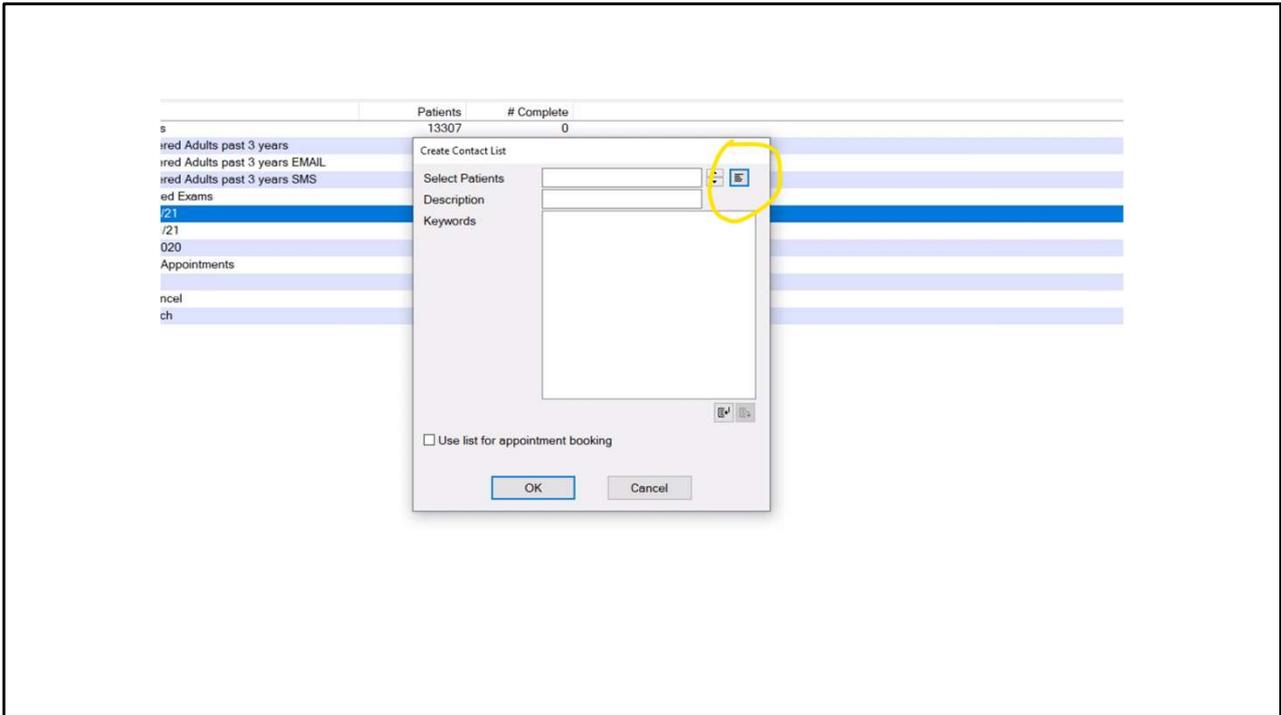Yours will obviously be called "Patient Information Sheet" etc.
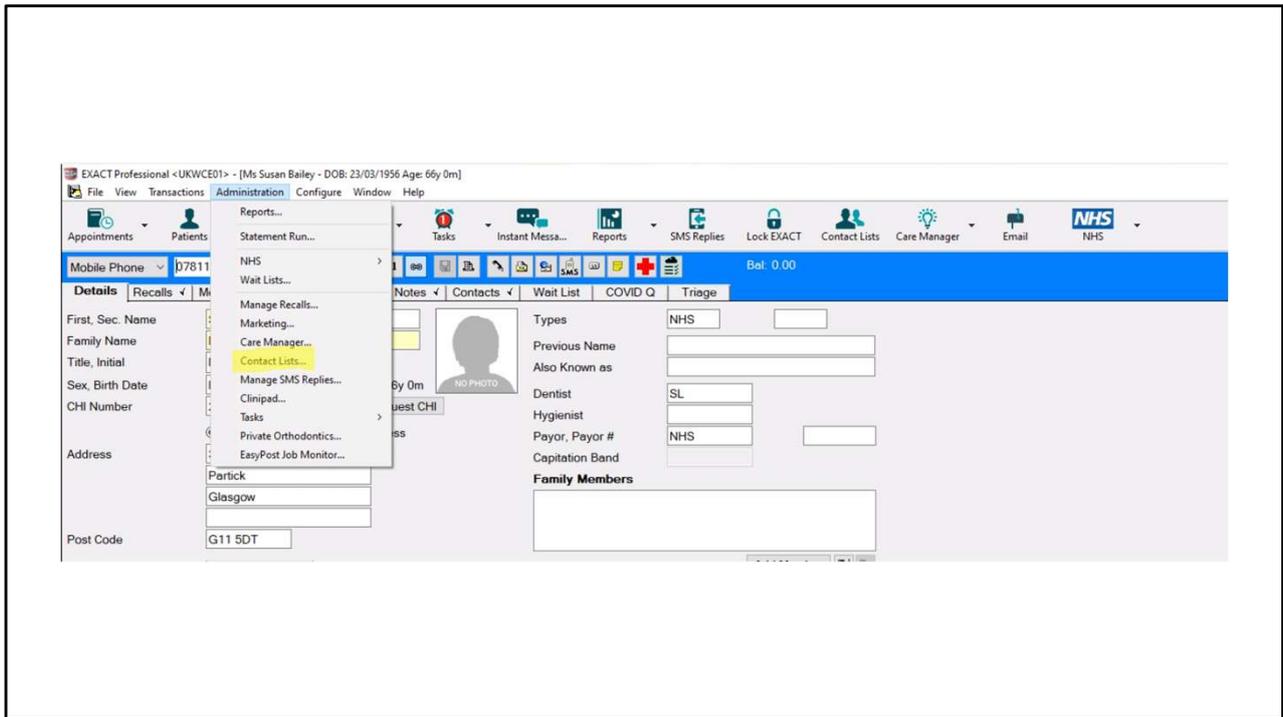
In Exact, access your list of contacts by opening the Administration drop-down, then selecting "Contact Lists"

This will take you to any contact lists that have already been created. To create a new list click "Create List" at the lower right of the screen, as highlighted above.

Clicking the menu button circled above will allow you to select your email template created at the setting up stage.
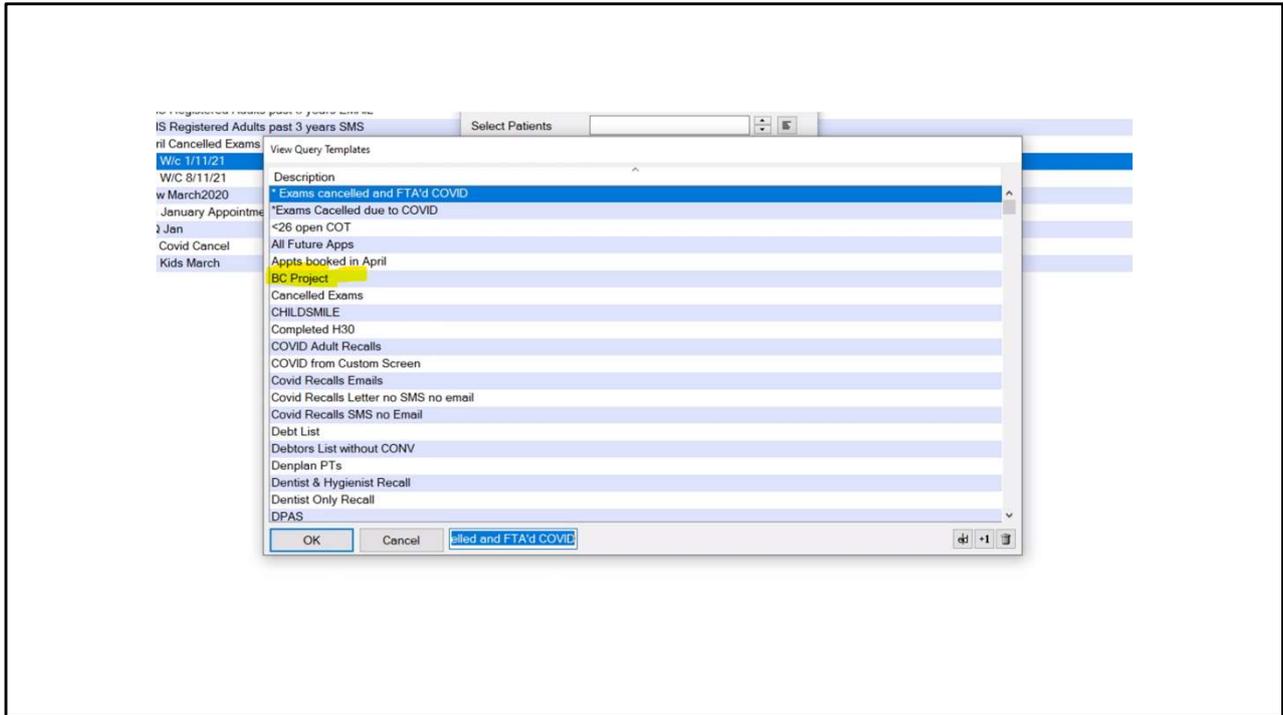
You may have called this e.g. "DRAMeRS" or a name that makes sense to you.
In the examples shown, it is called "BC Project"
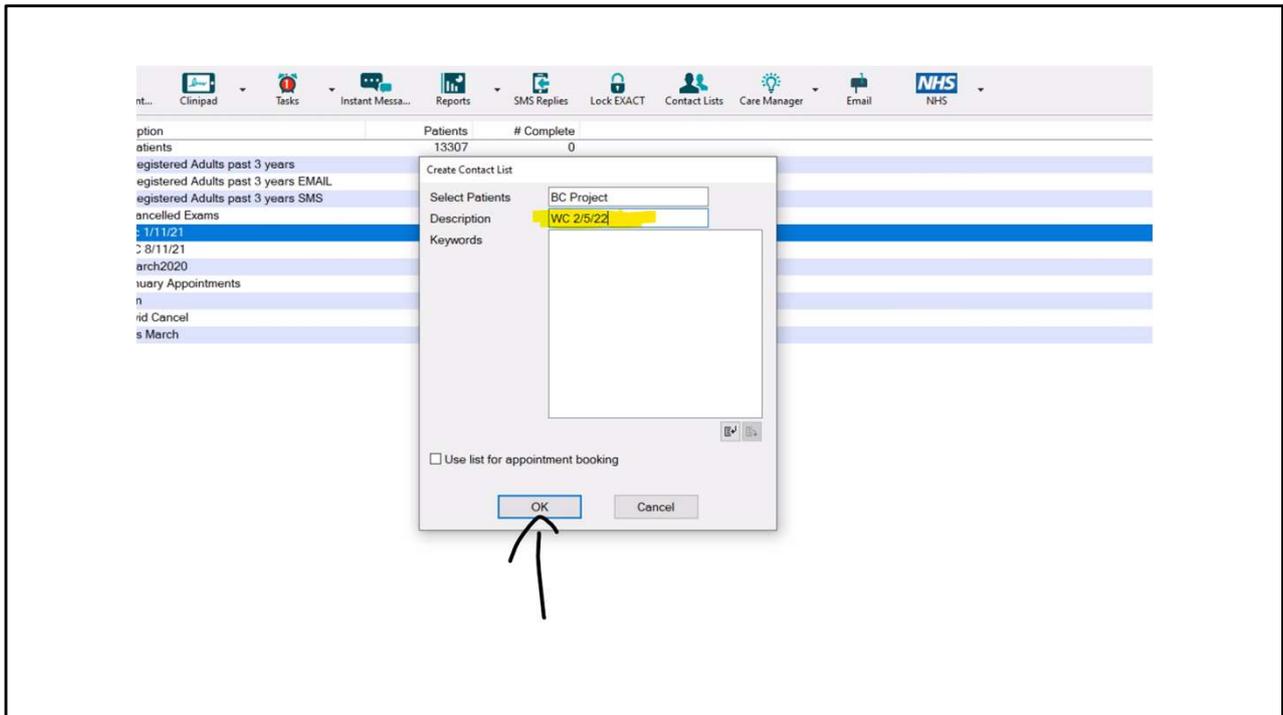
Select your email template, and then in the box marked "Description" enter a name of your choice. In the example shown, the description indicates the date of the week commencing when the relevant patients' appointments are scheduled for.
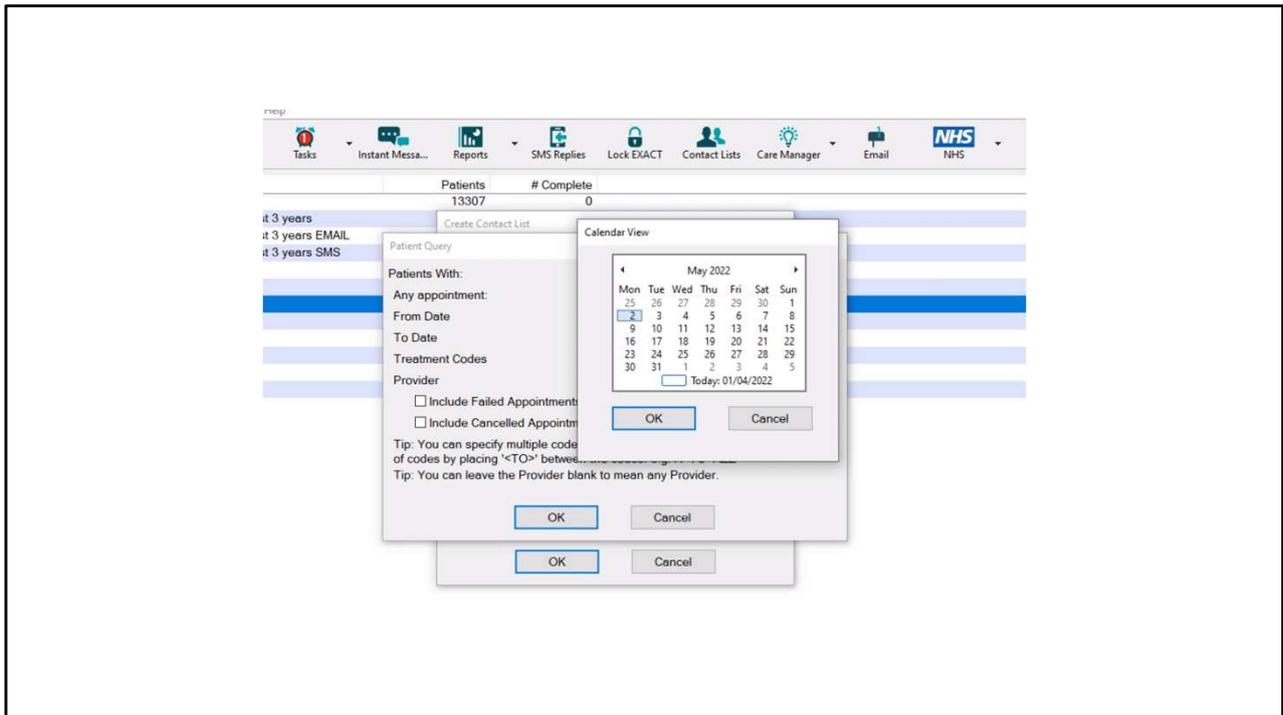
Enter the appointment dates for which you want to send out the message. Depending on how many patients you have booked in, and whether you intend to repeat the process each week etc, you can select dates "to" and "from". These dates are inclusive, and so patients booked in on the first and last dates will receive the message, as will all those in between.
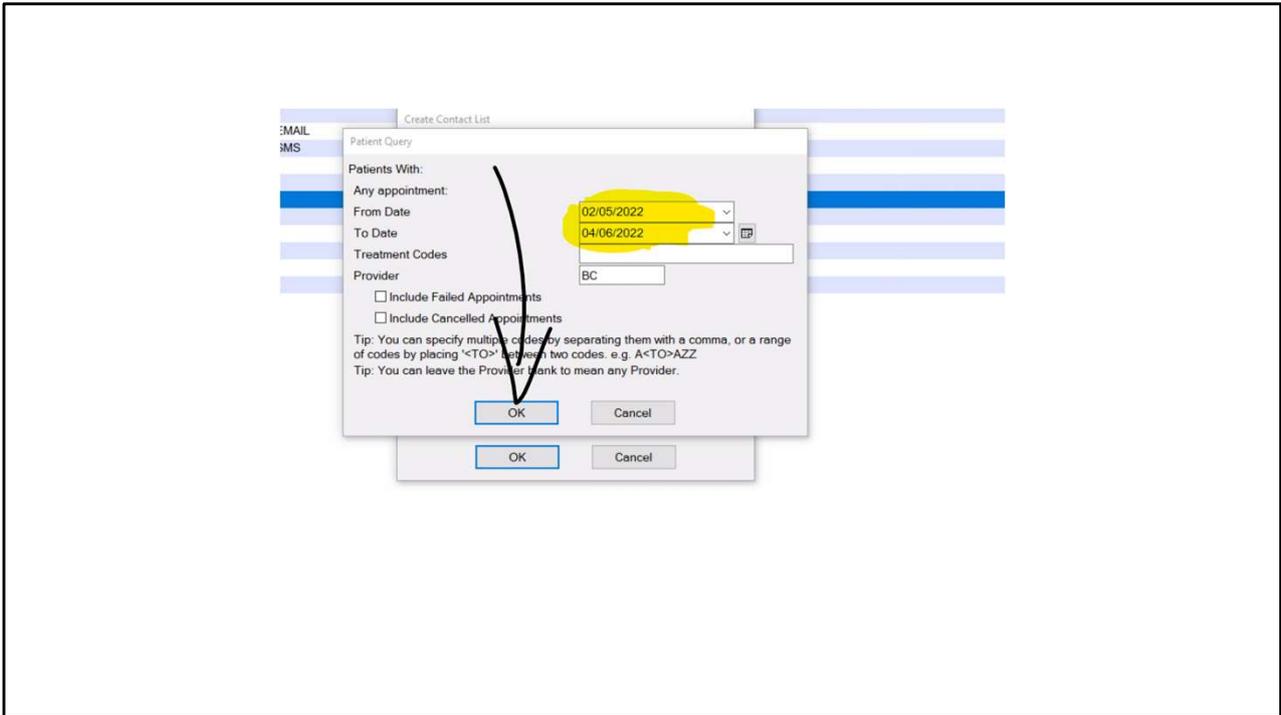
Leave the check boxes for failed and cancelled appointments UN-TICKED.
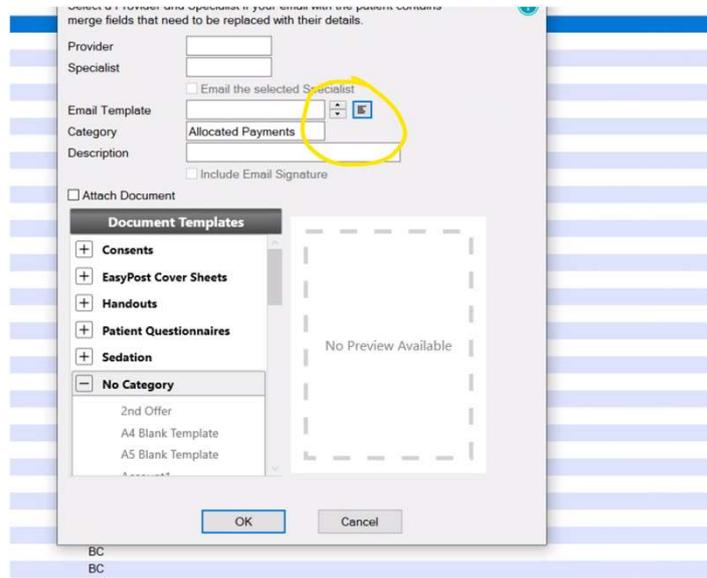Click OK.
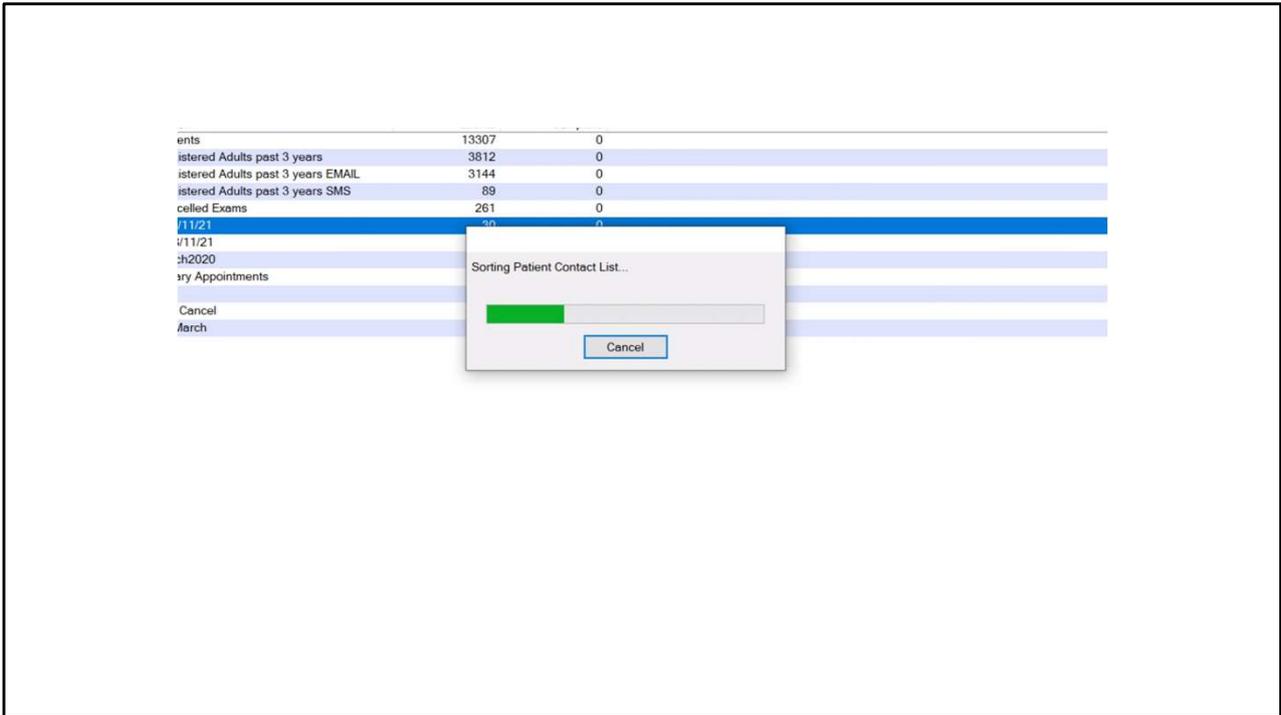
This will generate a contact list. It may take a while if you are not on the server computer.
Once completed, click "Yes" to view the list.
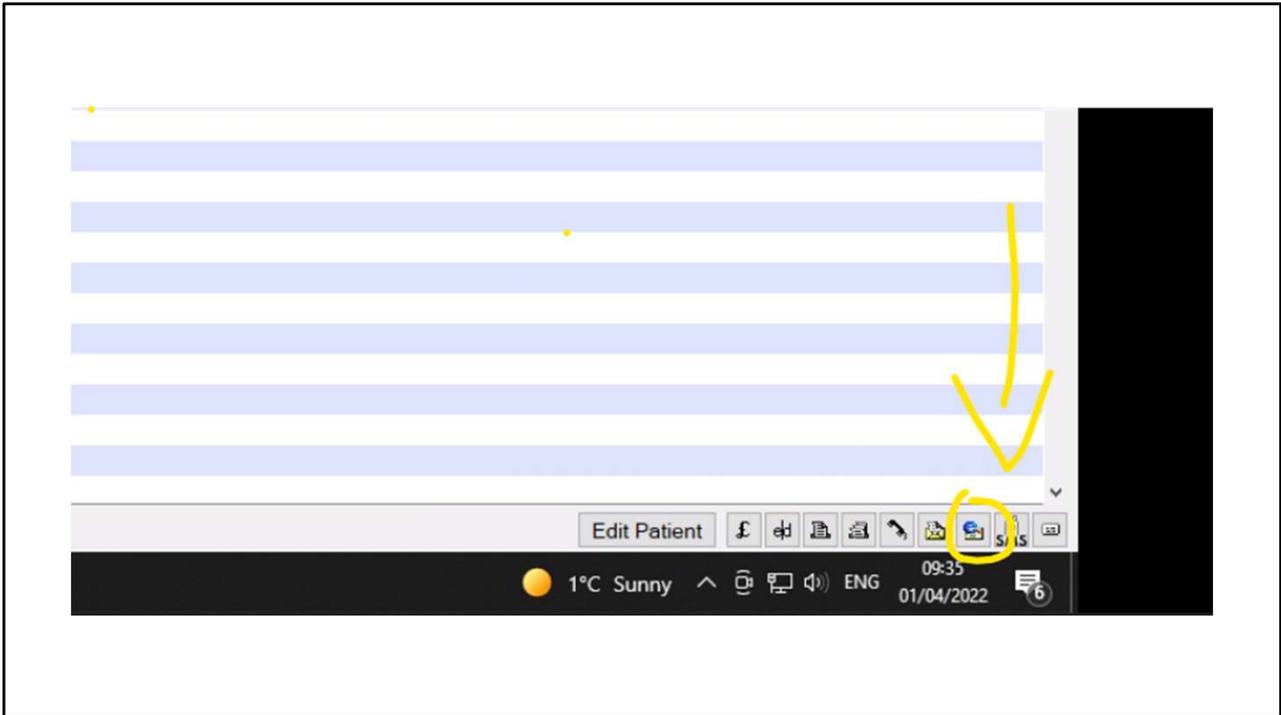
A list will appear, and at the bottom right of the screen, contact options will be displayed. Click the email button as shown.

Leave "Multiple email" checked.

If you want to have names disappear from the list once they have been contacted, check "Tick as completed when emailed". This is probably advisable to avoid duplicate messages.

Another screen will appear which will allow you to limit the people who are to be contacted. You can click "OK" to include everyone, or use this to exclude people from the trial if they don't meet the criteria.

Click the menu button (circled above) to open your email templates.

| NHS EXAMS	WCDP NHS Update	Practice
NHS UPDATE	Dental Practice Update	Practice
OBAPPCON	[Patient.Firstname], your appointment has been booked!	Practice
OBPLANNED	[Patient.Firstname] book your Planned Treatment	Practice
OBR1	Book your visit with [Practice.Name] online now!	Practice
OBR2	[Practice.Name] hasn't seen you in a while, book online	Practice
OBR3	[Practice.Name] misses you, book your appointment online	Practice
PLAN UPDATE	Book in NOW for your check-up!	Practice
PORTAL REMINDER	Appointment Reminder	Practice
PRIVATE UPDATE	Book in NOW for your check-up!	Practice
R1	Book your visit with [practice.name] now!	Practice
R2	[practice.name] hasn't seen you in a while, book now	Practice
RESEARCH BC	Research invitation: Screening for diabetes in dental practice	Practice
°CV Backlog	Let's get you sorted!	Online
•CM_OLB_EMAIL	Care Manager - Booking Request	Practice

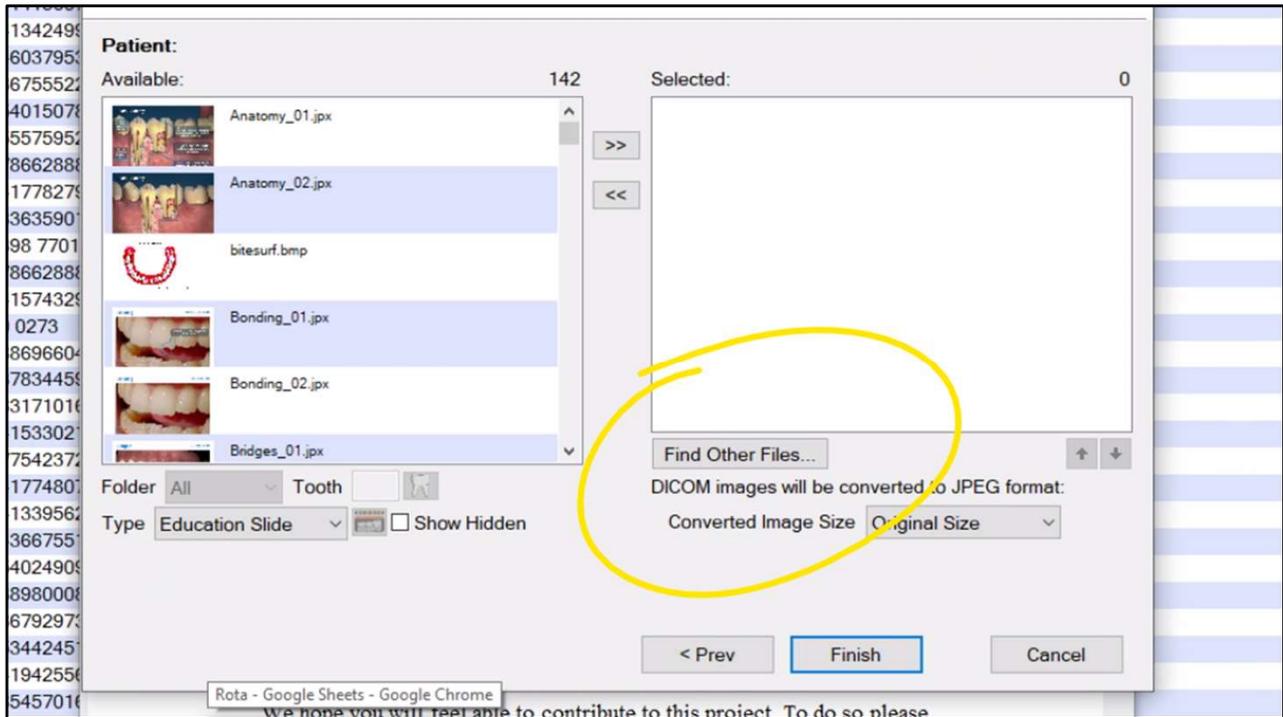Select the relevant template from the list
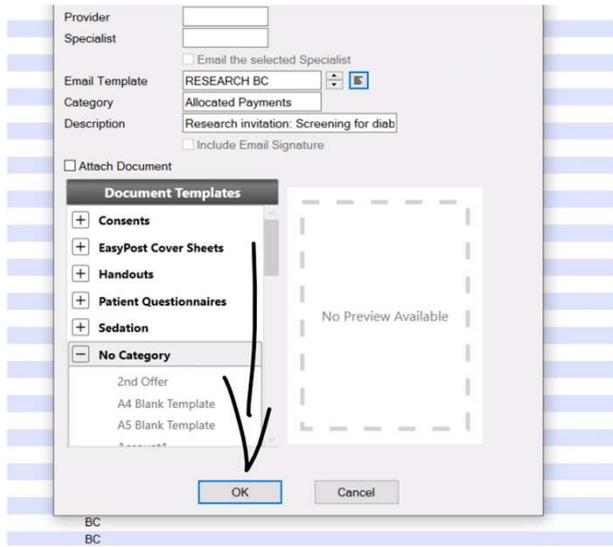
Click OK
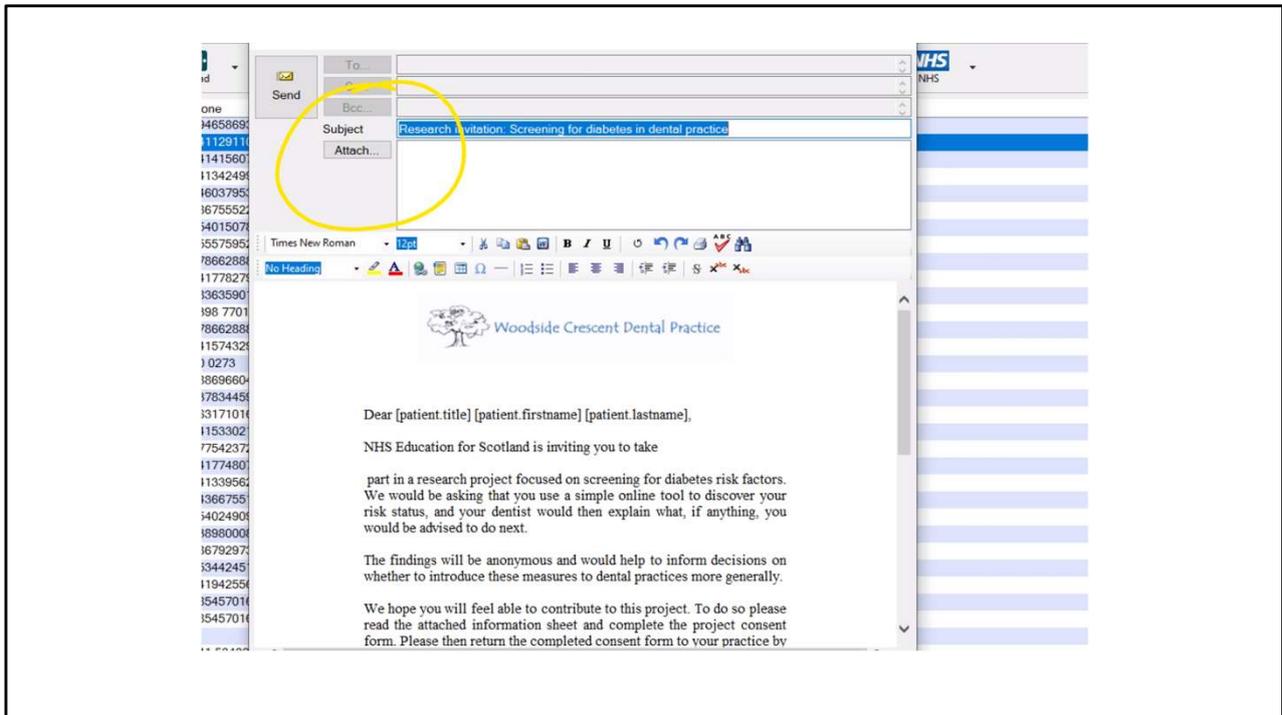
Click "Attach" to browse to the relevant documents. As above, this will either be the welcome message and the patient information sheet, or only the latter if your email contains the text of the welcome message already
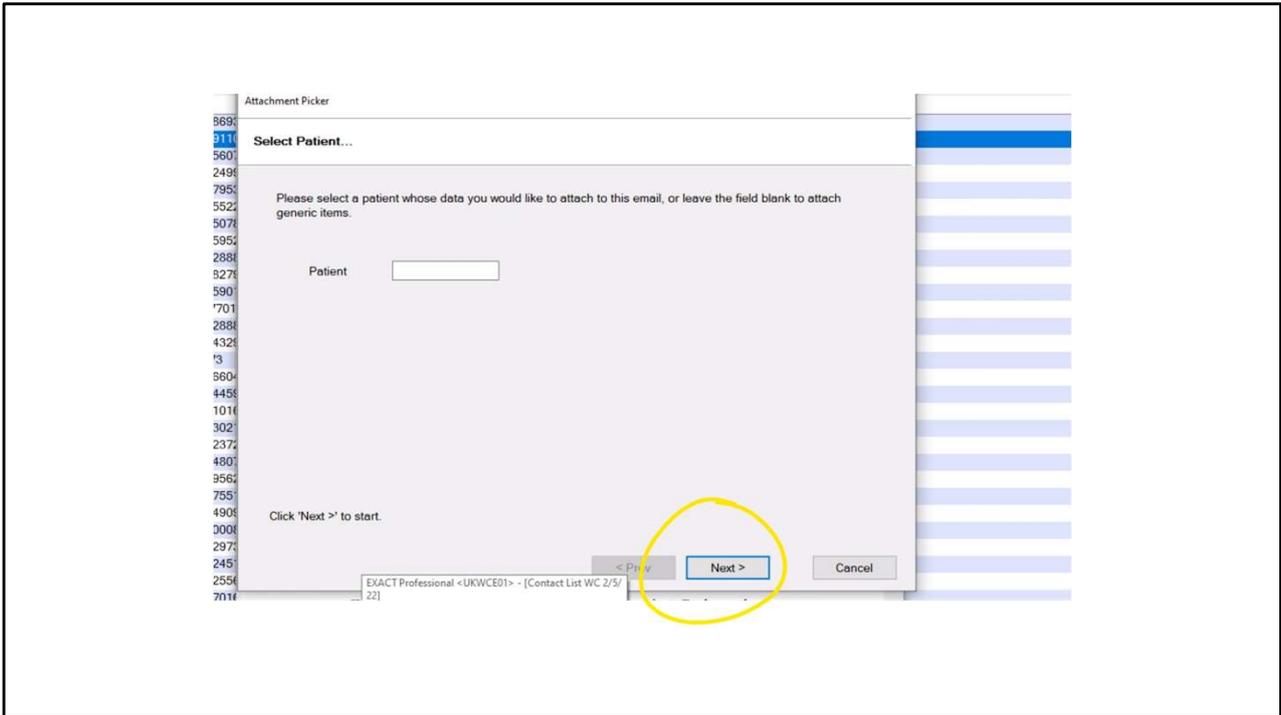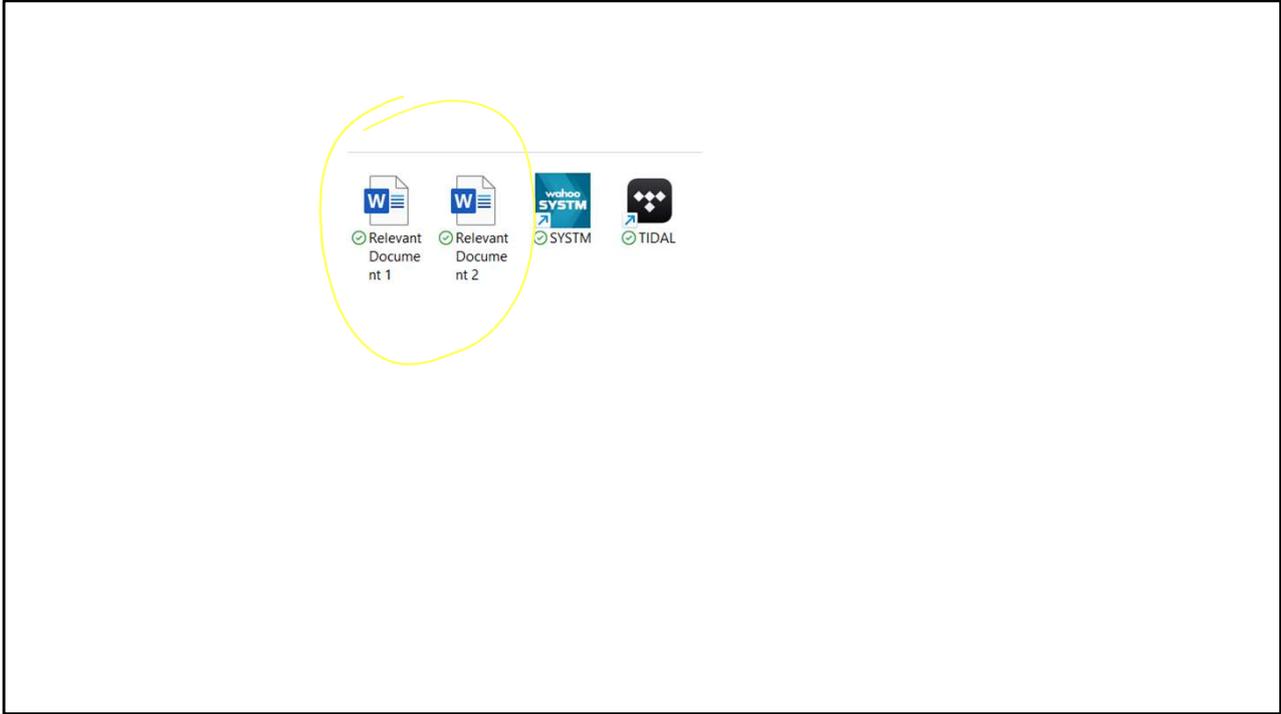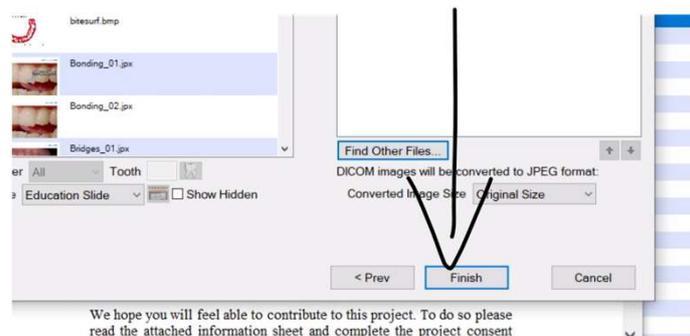
Click "Next"

Browse to the document)s) you wish to attach.

NB: Exact may default to allowing only pictures to be attached, so when browsing for the attachments, remember to select "All files" rather than just "Images" when browsing for the attachment in Windows.

Select the relevant document(s)

Click "Finish"