INSTANT WEB-BASED PATIENT COMMUNICATION

POWERED BY:

bLink PRO

Users Guide

bLINK PRO

A Division of Solutions by Design, Inc.

559 436 8380 • 800 888 4084 • Fax 559 436 5263 • www.solutionsbydesign.com

Table of Contents

bLink PRO
Users Guide

System Requirements and Practice Management Integrations

bLink Pro System Requirements

These guidelines must be followed to ensure that bLink Pro works reliably and effectively for your practice. Other equipment not meeting these specifications may not allow bLink Pro to function properly.

Operating System

(Windows) XP, Vista, Windows 7, 8.0 and 8.1

(Mac) OS 10.5 and Safari 5 or newer

Processor

(Windows) 2 GHz Intel Core 2 Duo or above recommended for smooth video playback.

(Mac) 2 GHz Intel Core 2 Duo or above recommended for smooth video playback.

Hard Drive

Only 2 GB of space is required. However it is imperative that the machine on which bLink Sync is installed remain powered on to facilitate the daily transfer of data.

Video Card

All basic video cards including PCI, ISA, AGP and integrated motherboard cards support bLink Pro.

Internet Connection

bLink Pro is a web based program and requires a high speed internet connection. Our tech staff will test your connection speed during installation.

Hardware Requirements

Desktop computer, monitor, keyboard and mouse

Additional Hardware (Optional)

Printer

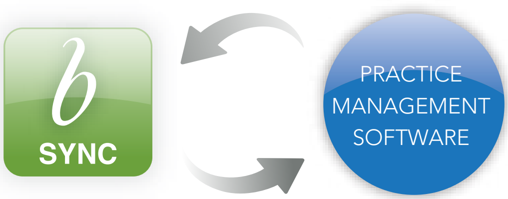
Practice Management Software Integration Partners:

INTRODUCTION AND OVERVIEW

Welcome to blink Pro! bLink Pro is a multi-faceted application that provides an efficient means of communicating with your patients and vice versa. bLink Pro includes several key features to enhance the communication process within your practice including email and text appointment reminders, on-line patient payment processing, automated distribution of educational videos as your patients progress through treatment and on-demand videos to play educational videos chair-side. bLink Pro syncs with your Practice Management Software to accumulate the data necessary to distribute information as you have defined in your setup.

bLink Pro is a web-based application that provides doctor and patient services. It is comprised of 4 modules:

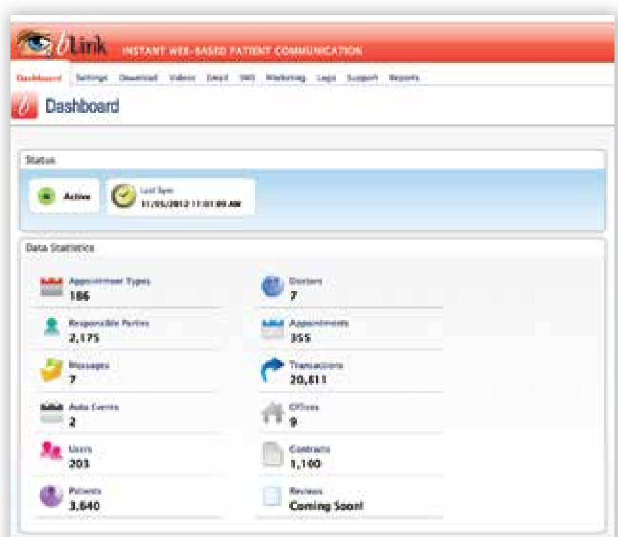
- **bLink Sync**
- **bLink Doctor Portal**
- **bLink Patient Portal**
- **ANDI Account**



bLink Sync

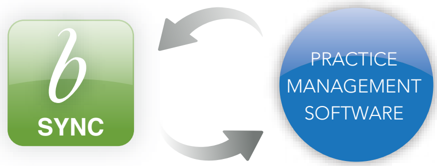
bLink Doctor Portal

bLink Patient Portal



ANDI

What is bLink Sync?



This is a utility module that synchronizes your **Practice Management Software** with **bLink Pro** to automate transactions and pass data. Our support team will remotely install bLink Sync on your office computer and establish all of the required settings for activation. It is vital that the computer where bLink Sync is installed remain powered on and connected to the internet. If the power fails or the internet connection is disabled, bLink Pro will not be able to sync with your Practice Management Software and pull current data, and subsequently no messaging will be activated.

IF YOUR COMPUTER INADVERTENTLY POWERS OFF, please follow the steps below in order to complete an update push and re-establish the connection between bLink Pro and your Practice Management Software:

1. Open the bLink Sync application on the computer. This should be located on your desktop or in the **Applications > Solutions by Design > bLink > bLink Sync.app.**

2. Make sure that in the bottom left hand corner it says database connected.
   if it does not say Database Connected try the Reset Database Connection button. If it still does not connect please contact Solutions by Design Support.

3. If the database is connected ***click the Force Update Push button.***

4. The boxes will be grayed out and bLink Pro should begin syncing with our database.

5. When the update is finished the boxes will return to normal and the update should be complete.

6. Please leave the bLink Sync application open after syncing.
   bLink Pro will not sync if the sync application is not open.

What is bLink Doctor Portal?

This is a user-friendly web-based interface that you access by clicking a downloaded shortcut or your website Patient Login button. You will be able to check messages sent from your patients through their Patient Portal, make changes to notification settings for your patients and access On Demand videos.

Note: When logging into your Doctor Portal use the same credentials as your ANDI account.

bLink Doctor Portal

What is bLink Patient Portal?

The bLink Patient Portal is accessed from a login button located on your website.

Similar to the Doctor Portal, the Patient Portal is comprised of several tabs. The Home tab is a snapshot of relevant data pertaining to that particular patient. Patients can check their Message Center on their dashboard, review their scheduled appointments, check their account balance, make online payments, send messages to your practice, adjust their personal notification settings for email and text correspondence and complete a patient survey.

bLink Patient Portal

Note: You can choose the color of the Patient Login button that will appear on your website under Settings within ANDI. If Solutions by Design is not hosting your website, your webmaster can download the code that creates the login on your website in any of the featured colors.

What is ANDI?

ANDI

APPLICATION NETWORK & DATA INTERFACE

ANDI is Solutions by Design's **web-based content management system.** As our client, you will use ANDI to manage the content and settings for all your Solutions by Design products. Upon receiving your bLink Pro order, login credentials will be sent to you via email. You will need these credentials to access and manage your bLink Pro settings. If you are already a SBD client, you will use your existing ANDI login credentials.

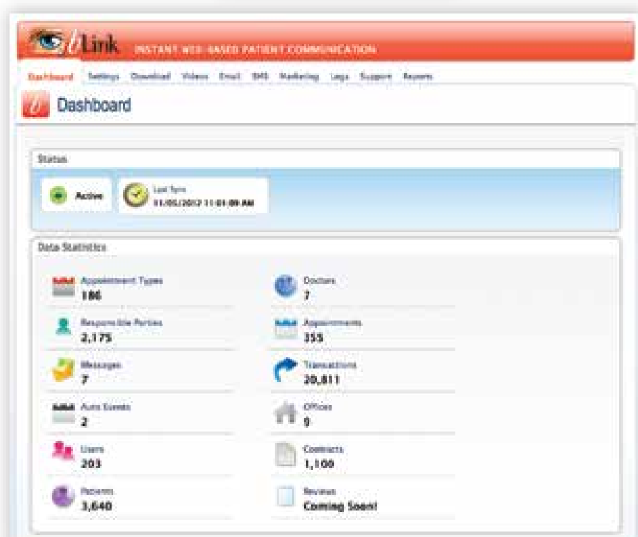
Manage your bLink Pro Settings via ANDI:
There are 2 ways to log into ANDI.

1) You can login to ANDI by clicking on the downloaded shortcut .

2) Or going to **www.andisolutions.com** and entering your user name and password.

Once logged in, you will see icons that represent each of the Solutions by Design products that you utilize in your office. Select the red bLink Pro icon. This is where you control all of your settings for bLink Pro.

Dashboard



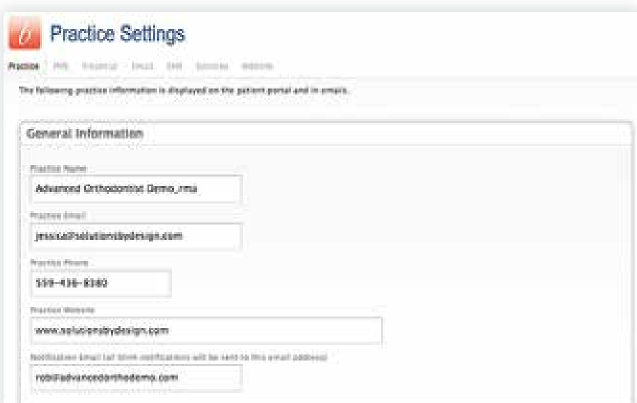
- Shows status of bLink Pro and date of last sync with your Practice Management Software
- Overview of the data bLink Pro has received from your Practice Management Software

Settings

- **Practice:** Set your practice demographics
- **PMS:** Activate the connection between your Practice Management Software and bLink Pro
- **Financial:** Select your Payment Processor for online payment within bLink Pro
- **Email:** Create email account name and setup your email signature
- **SMS:** Set the calling parameters for outgoing text messages
- **Services:** Activate features in bLink Pro including email and text messaging
- **Website:** Patient Login icon and code for your website provider

Practice

Set your practice Information and practice demographics here by entering the requested information. bLink Pro displays this data in the header of the Patient Portal.



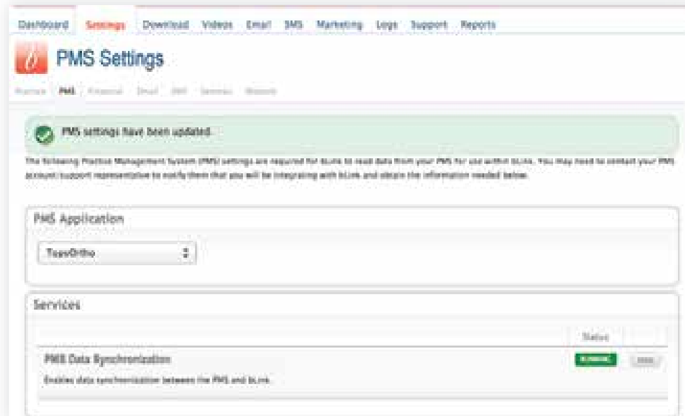
Note: For practices with multiple locations, please use the address and phone number for your main office. The Email Signature can be used to list all location contact info and Reminders can be customized with specific location details.

The Practice Email is used for all bLink Pro email message replies, but is not displayed in the Patient Portal.

The Notification Email can be different than the Practice Email since it is used only by Solutions by Design to announce any updates or changes to bLink Pro.

PMS

This is where a SBD Technician will input the necessary selections to connect bLink Pro with your Practice Management Software.

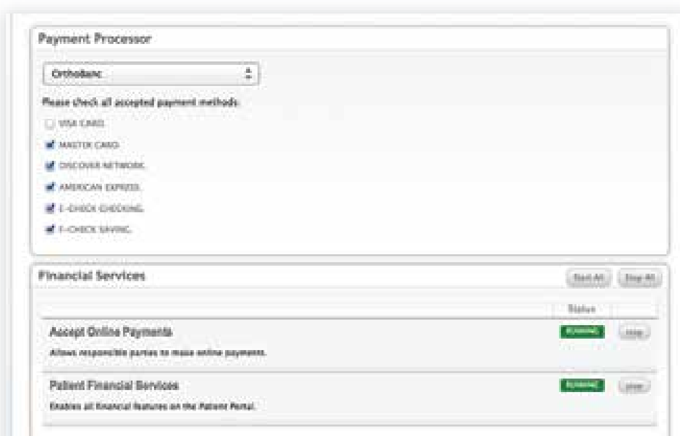


Note: Please do not make any changes to these fields unless directed to do so by a Solutions by Design technician. Any changes can disable the connection with your PMS.

Financial

Choose your desired Payment Processor Service from our dropdown menu.

Please fill out all fields that appear after selecting the Payment Processor as each has different requirements. All Payment Processors will require an account number.



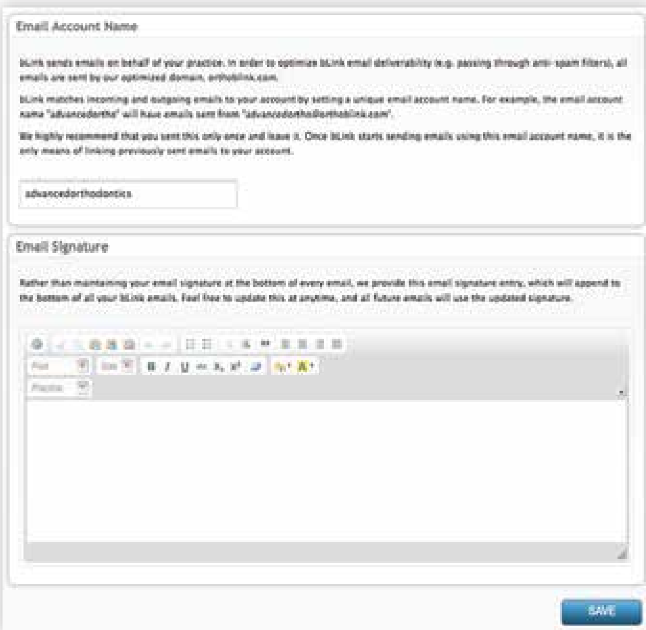
Note: You may need to consult with your payment processor if you do not have some of this information. Enter a minimum amount that you are willing to accept as an online payment.

Make sure you click the blue SAVE button at the bottom of the page to update your settings.

Email

Email Account Name
bLink Pro sends emails on behalf of your practice. In order to optimize email deliverability (e.g. passing through anti-spam filters), all emails are sent by our optimized domain, **orthoblink.com.** The Email Account name is added in front of the domain so your patients will recognize who is sending the email. *For example, the Email Account Name "AdvancedOrtho" will have emails sent from "AdvancedOrtho@orthoblink.com".*

The Email Account Name can only be changed prior to starting your bLink Pro services. Once bLink Pro starts sending emails, it is the only means of linking previously sent emails to your account.



Note: To preview your Email Signature go to the Email tab, select any of the email types and click on the PREVIEW AND SAVE button at the bottom of the page. It will preview the entire email message including your Email Signature.

Email Signature
Rather than typing a signature at the bottom of every email, we provide this email signature, which will append to the bottom of all your bLink Pro emails. Feel free to update this at any time, and all future emails will use the updated signature.

You can use the provided options to enhance your Email Signature such as font, size, bold, font color, etc. The Practice drop down menu allows you to use a "token", which will appear highlighted within brackets. A token is information pulled directly from your PMS, saving you the time of typing everything out. Tokens will appear highlighted and within brackets, but upon previewing the message the text will show normally.

Don't forget to SAVE your settings.

SMS: Texting Services

Outgoing Mobile Number: This is the local number we have procured for you to allow SMS messages to be sent. This is not an active phone number, so no replies or calls can be received at this number.

Note: DURING INSTALLATION, OUR TECH STAFF WILL PROGRAM THe SMS SETTING FOR YOU. We will be adding "DO NOT REPLY" or "Call our office" to all SMS messages so your patients will not hit reply to contact your office.

International Prefix: If your patients reside outside of the United States, you will need to enter the international calling prefix as SMS messages are sent from the United States. For more information on what the international calling prefix visit **http://www.howtocallabroad.com.**

Remember to always click SAVE to update your settings.

Services

Under the Services sub tab you will see a listing of all bLink Pro features and services. You can see which of these features are currently Running and those you have chosen to Stop. You can use the Start All and Stop All to start or stop all services in each category or individually activate and deactivate each service.

This page does not require you to Save your settings, as each Start or Stop button auto saves for you once selected.

Website

Here is where you can copy the graphics and link code for the Patient Login button. If Solutions by Design is not hosting your website then your website administrator will need this code to allow the Patient Login button to appear on your website. You can copy and paste this code into an email and send it to your website administrator.

Downloads

- **View PMS Settings**
- **Download bLink and ANDI shortcuts**
- **Download bLink Sync**

Under the Download Tab you will see the selected Practice Management Software utilized by your practice. *Please do not make any changes unless directed to do so by a Solutions by Design technician, as it will disrupt the connection with your PMS.*

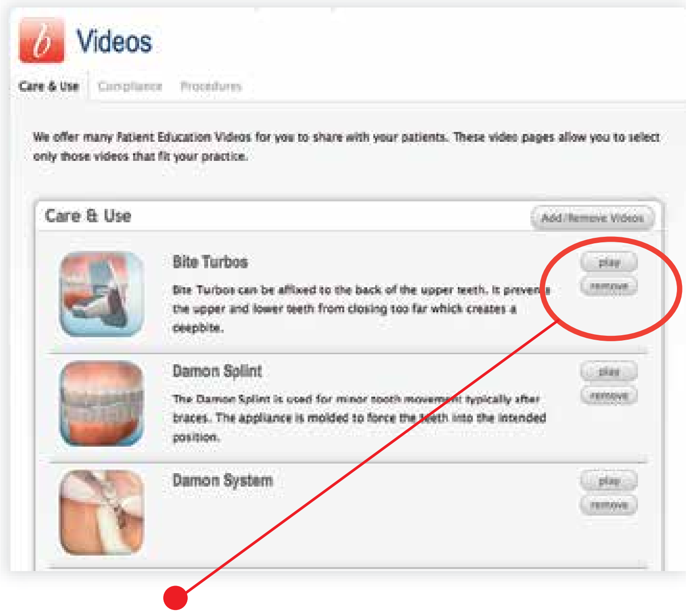
The second area is to download shortcuts on all the computers in your office for ANDI and your Doctor Portal login. Just click on either Mac OS or Windows depending on which type of computer you are downloading onto.

You will also see a bLink Sync download button. This is for use by our technicians and will have been installed on your server. *Please do not download unless directed to do so by a Solutions by Design technician, as it will disrupt the current connection with your PMS.*

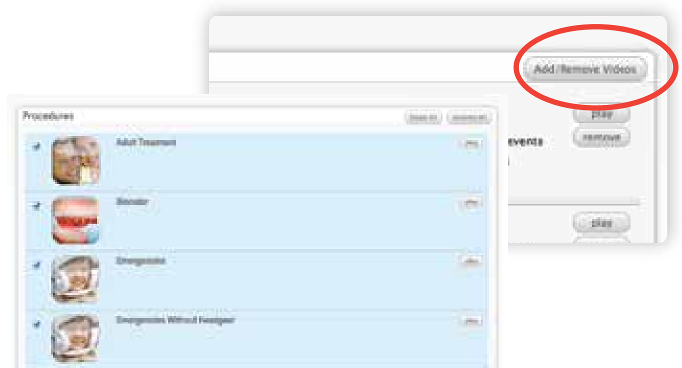
Video

- **Review videos**
- **Select Care and Use of Appliances videos for your library**
- **Select Compliance videos for your library**
- **Select Procedural videos for your library**

The video section allows you to select the videos that correspond to the way you practice. All of the available videos are preloaded for your practice. You can preview any of the videos by clicking on the Play button next to each description.

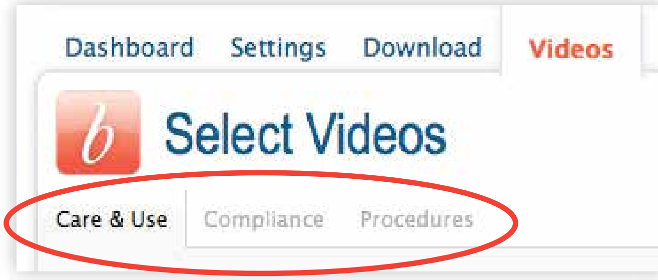


You can remove any of the videos from your video library by simply clicking the Remove button at the right hand side of each video description. Don't worry, that video is not gone forever. If you change your mind and wish to add it back to your practice's library, **click on the Add/Remove Videos button** at the top of the section. You will see the complete list of videos with your currently selected videos highlighted in blue.



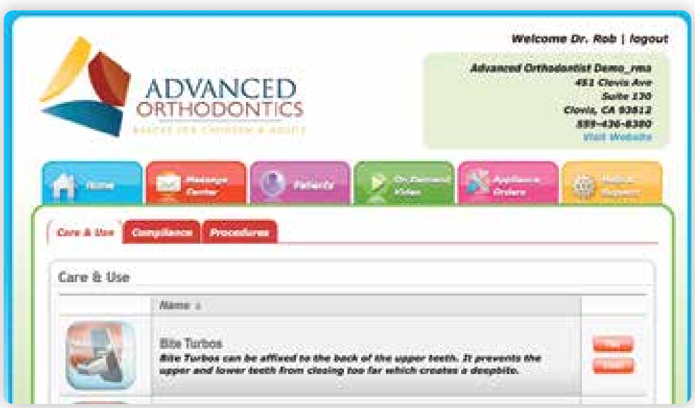
To add a video back, click on the small box located to the left of the video image and scroll all the way to the bottom of the page to Save.

There are 3 tabs for videos:



- **Care and Use** refers to videos on the care and use of specific appliances.
- **Compliance v**ideos demonstrate to the patient how to comply with the clinical guidelines.
- **Procedure** videos provide treatment animations for a variety braces types, removable appliances, fixed appliances, extraction and surgical cases.

Videos are utilized in 2 different ways: On Demand or playing videos one at a time in the office, and **Patient Education Emails**, as automated email distribution.



bLink Doctor Portal

On Demand allows you to call up any of our educational videos instantly through your **Doctor Portal** for patient chair-side presentation. You also have the option of emailing the video home for the patient by clicking the Email button. A new screen will open. Start typing in the patient's last name and the program will begin listing patients. Select from the drop down which patient and it will automatically list emails you have on file for that patient. You can then type in a subject and message to accompany the video and then click Send. The patient will have a message waiting for them when they arrive home.

Auto-event distribution of Patient Education Videos
bLink Pro can be synchronized with your practice management software applications to pre-schedule the automatic distribution of patient educational videos as the patient progresses through treatment. You can select videos that correspond with each appointment type and designate the desired timetable for the distribution.

This auto-event distribution is called Patient Education Emails and includes the following features:

- Synchronize each appointment type with corresponding educational videos
- Preset the timing for the email distribution of each message up to 30 days prior to the appointment or 30 days after
- Customize an email message including any pertinent information based on the appointment type

To read more on this subject see Patient Education under the Email tab.

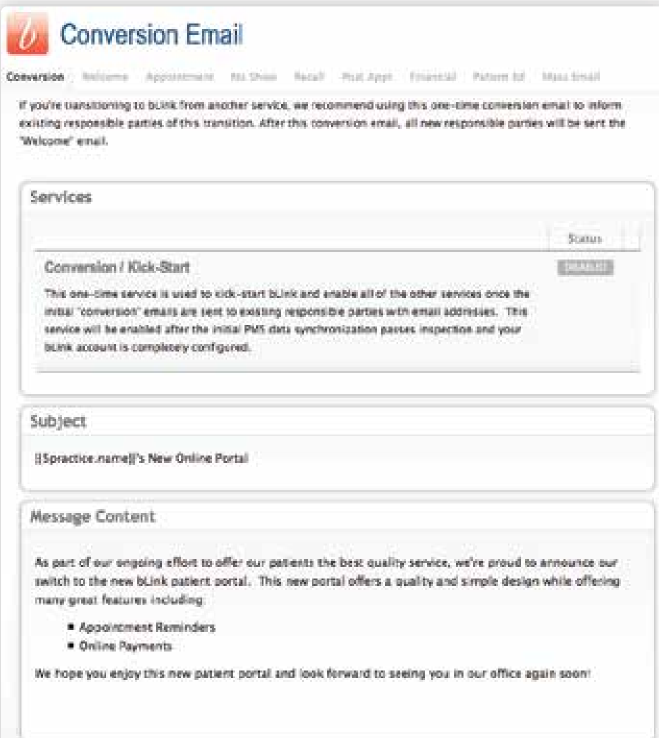
Email

- **Edit Conversion Message Content**
- **Edit Welcome Message Content**
- **Edit Appointment Reminder Message Content & Settings**
- **Edit No Show Email Message Content**
- **Edit Recall Email Message Content & Settings**
- **Edit Post Appointment Email Message Content & Settings**
- **Edit Late Payment Email Message Content & Settings**
- **Edit Patient Education Email Message Content & Settings**
- **COMING SOON: ETOONS Email Module**

All of the email settings located under each sub tab follow the same formatting guidelines and are simple to use. You can use our default messages or you can customize each to your preferred script.

Conversion Email:

If you are transitioning to bLink Pro from another reminder service, we recommend using this one-time Conversion Email to inform your patients of this change. The system will create new login credentials using the Financial Responsible Party's email address and a computer generated password for all existing patients. This Conversion Email will only be sent once upon starting your bLink Pro services. After that, any new patients joining your practice will receive a Welcome Email.



Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.

There is also a SEND TEST EMAIL button which sends an email example to the email address used to sign into ANDI.

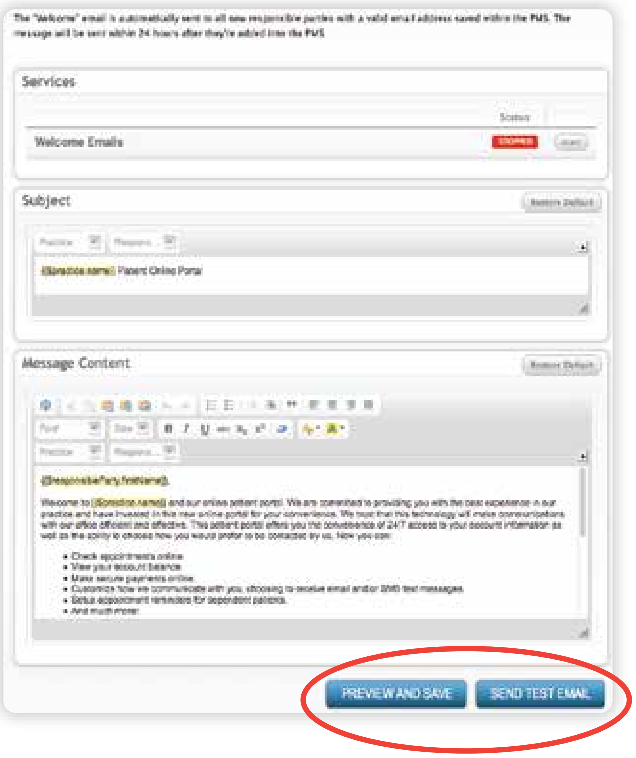
Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Welcome

Upon going live with your bLink Pro services, the Welcome Email is sent to all **Financial Responsible Parties** with a valid email address saved within your Practice Management Software. After that, any new patients joining your practice will receive a Welcome Email within 24 hours of being entered into your Practice Management Software.

Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.



There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

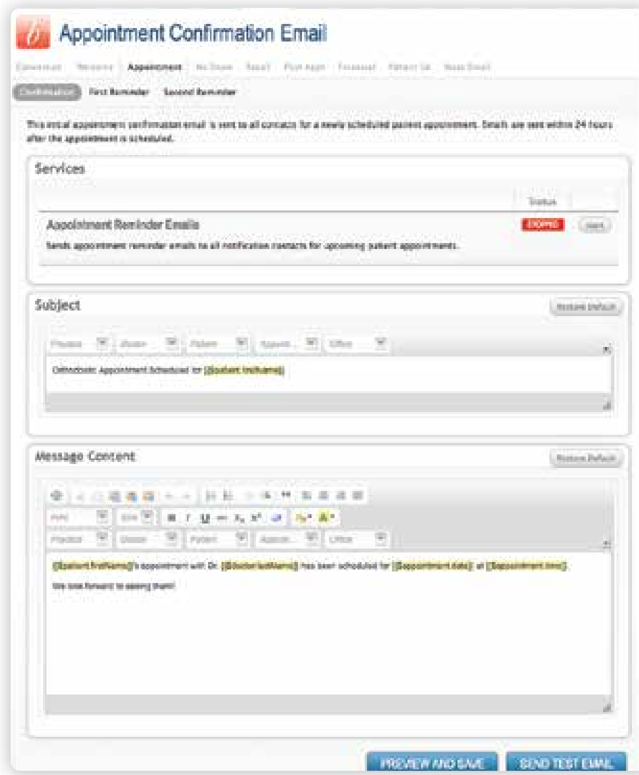
Appointment

There are 3 Appointment Emails:

- **Confirmation**
- **First Reminder**
- **Second Reminder**

Confirmation Email

This initial appointment Confirmation Email is a digital version of a “Your Next Appointment is…” card. It is sent to the **Financial Responsible Party** and any additional contacts that have been added to the patient’s bLink Pro Notification settings for a newly scheduled patient appointment. Emails are sent within 24 hours after the appointment is scheduled.



Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.

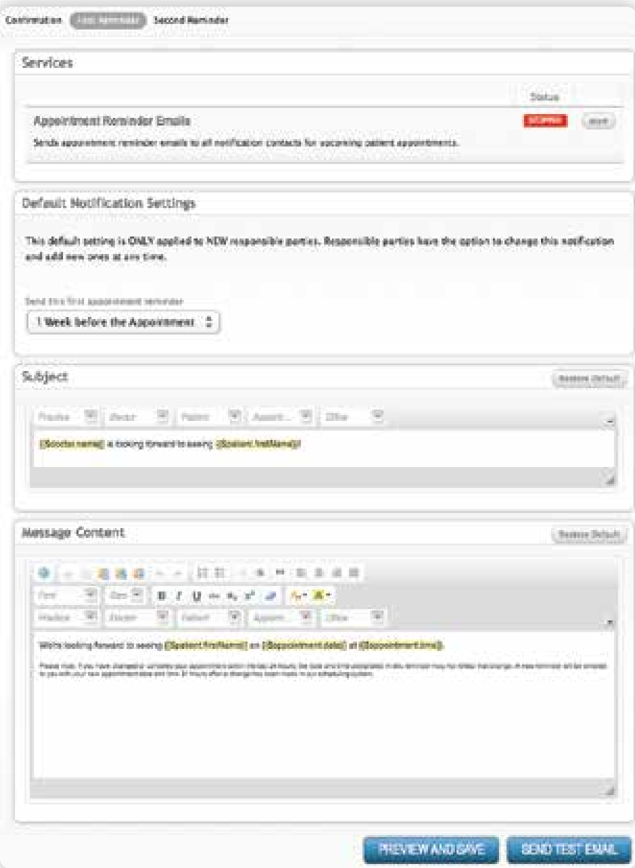
There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

First Appointment Reminder Email

The First Appointment Reminder Email is sent to the Financial Responsible Party and any additional contacts that have been added to the patient's bLink Pro Notification settings.



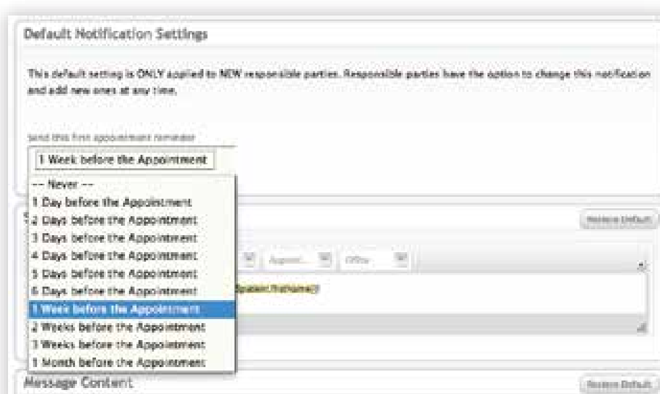
Default Notification Settings
This default setting is set prior to going live with your bLink Pro service and any later changes will ONLY apply to NEW patients. This is a general setting for your practice that can be overridden by individual settings selected by Financial Responsible Parties though their Patient Portal.

Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click **SAVE.**

There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

Note: You must preview any changes, and then SAVE to update the message settings.

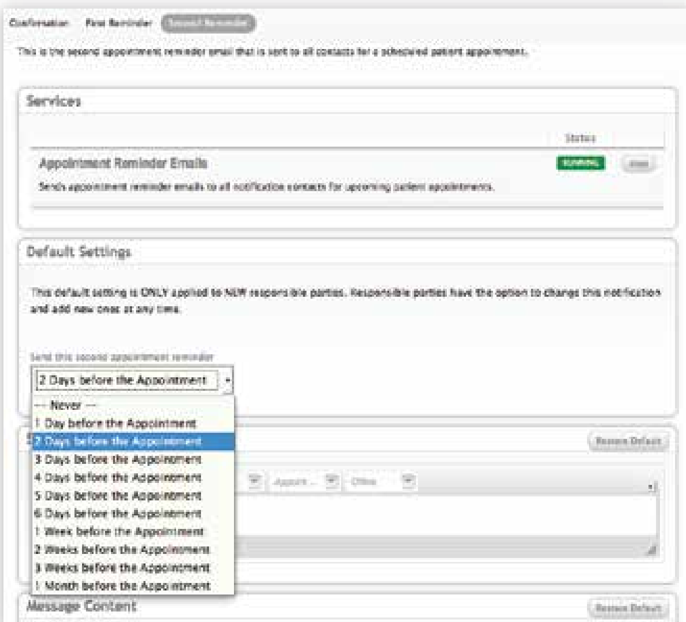
If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.



Second Appointment Reminder Email

The Second Appointment Reminder Email is sent to the Financial Responsible Party and any additional contacts that have been added to the patient's bLink Pro Notification settings.

Default Notification Settings
This default setting is set prior to going live with your bLink Pro service and any later changes will ONLY apply to NEW patients. This is a general setting for your practice that can be overridden by individual settings selected by Financial Responsible Parties though their Patient Portal.



Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.

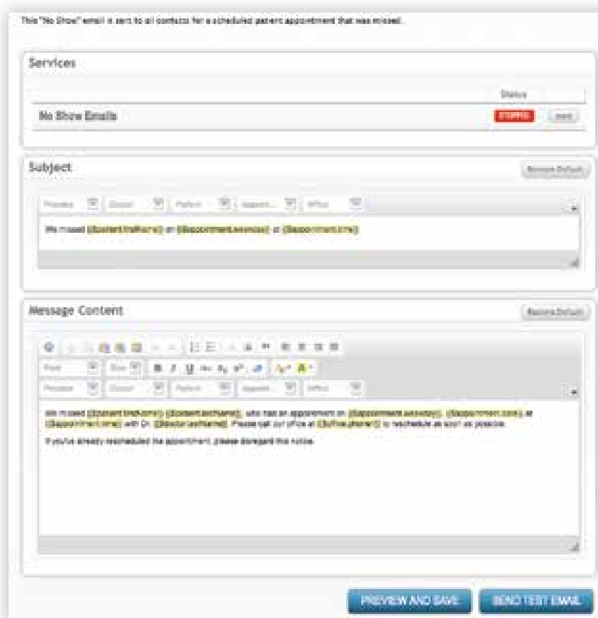
There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

No Show Email (Missed Appointment)

The No Show Email is sent to the financial responsible party and any additional contacts that have been added to the patient's bLink Pro Notification settings when an appointment is marked as missed in your Practice Management Software.



Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.

There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Recall Messages

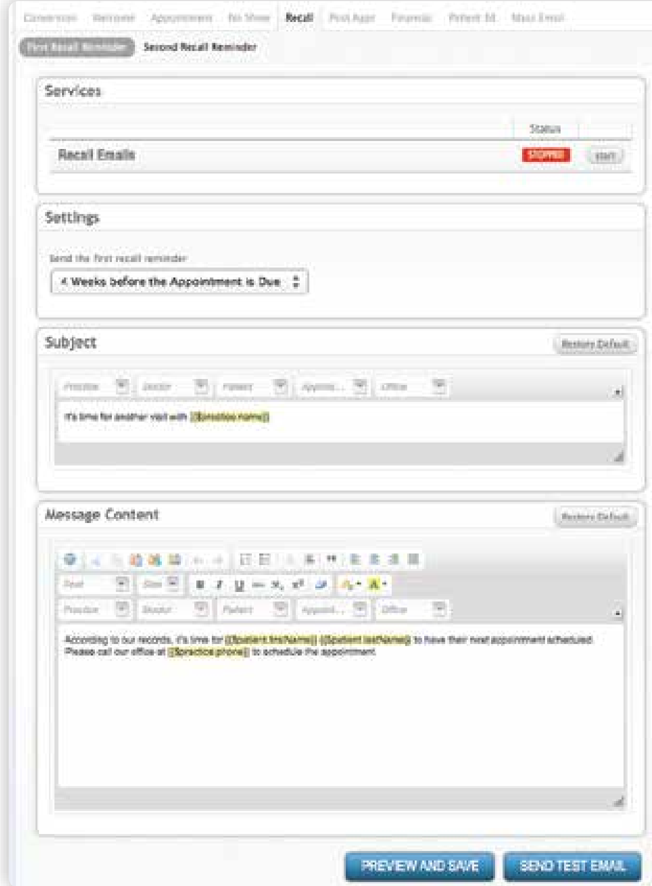
There are 2 Recall Emails:

- **First Recall Reminder**
- **Second Recall Reminder**

First Recall Reminder Email

The First Recall Reminder Email is sent to the Financial Responsible Party and any additional contacts that have been added to the patient's bLink Pro Notification settings.

Default Notification Settings
This default setting is set prior to going live with your bLink Pro service and any later changes will ONLY apply to NEW patients. This is a general setting for your practice that can be overridden by individual settings selected by Financial Responsible Parties though their Patient Portal.



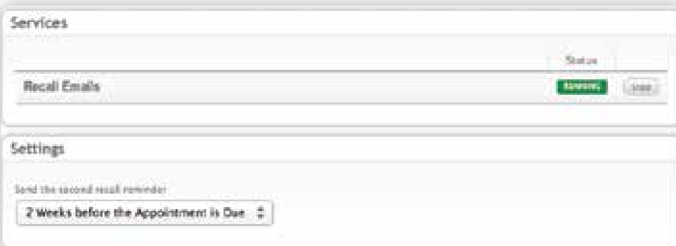
Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.

Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Second Recall Reminder Email

The Second Recall Reminder Email is sent to the Financial Responsible Party and any additional contacts that have been added to the patient's bLink Pro Notification settings.



Default Notification Settings
This default setting is set prior to going live with your bLink Pro service and any later changes will ONLY apply to NEW patients. This is a general setting for your practice that can be overridden by individual settings selected by Financial Responsible Parties though their Patient Portal.

Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.

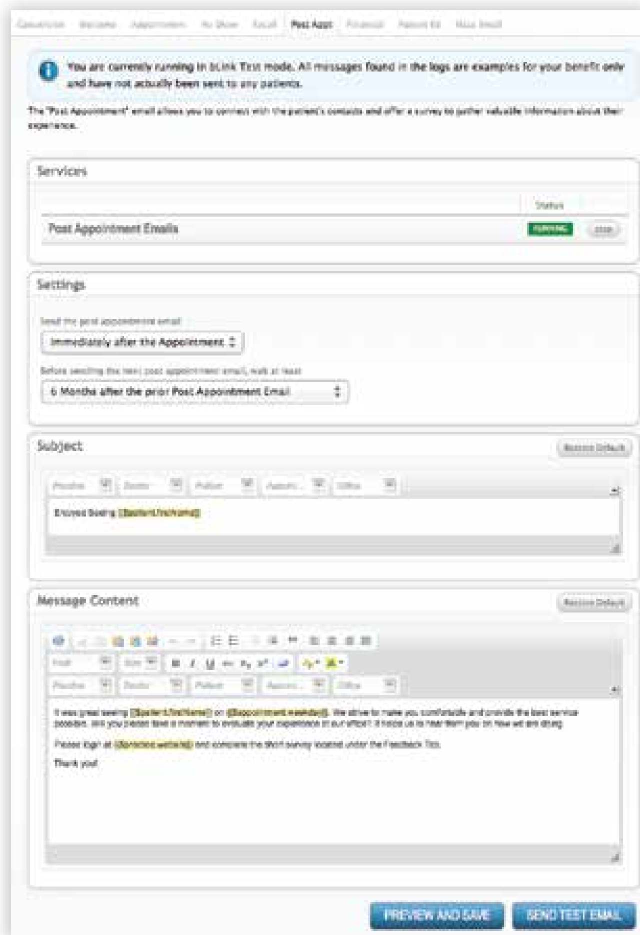
There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Post Appointment Email

The Post Appointment Email is sent to the Financial Responsible Party and any additional contacts that have been added to the patient's bLink Pro Notification settings. This email allows you to connect with the patient following their appointment time and offer a survey to gather valuable information about their experience.



Settings
The first drop down menu allows you to select when you want to send the email.

The second drop down menu allows you to select how often you want the email sent.

Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.

There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

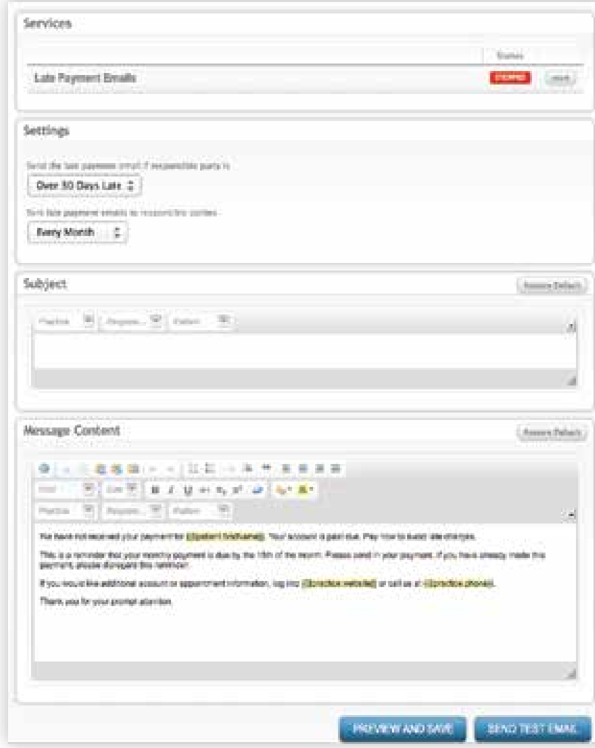
Financial Email: $ Due or Past Due

The Financial Email is sent to the Financial Responsible Party when an account is past due according to the records in your Practice Management Software.

Settings

The first drop down menu allows you to select how late the account must be to be considered past due.

The second drop down menu allows you to select how often you want the email sent until the account is current according to your Practice Management Software.



Use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click SAVE.

There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

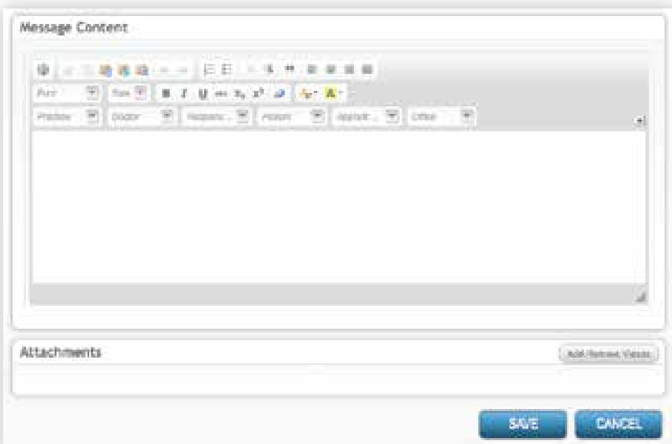
Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

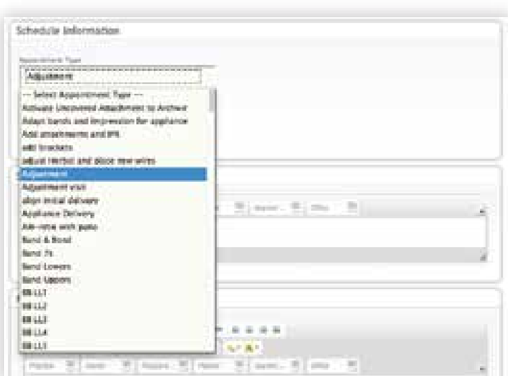
Patient Education Emails

Educate your patients automatically with patient education emails and videos. These emails are scheduled based on appointment types and can be sent before or after an appointment.

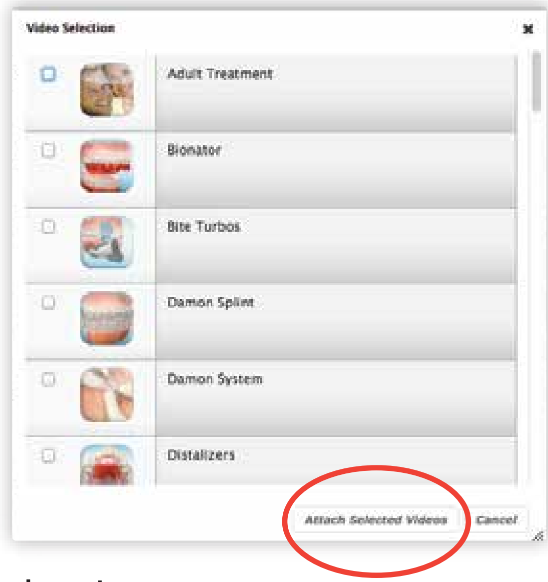
Click on the ADD button to create a new Patient Education Email.



Schedule Video Distribution by Appointment Type
The first drop down displays a list of appointments from your Practice Management Software. The second drop down is used to schedule when you would like to send the email, either before or after the Treatment date.



Type a subject line for your email and message content. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but when the message is sent the text will display normally.



Attachments

Click on the ADD/REMOVE VIDEOS button to include/attach any of the videos in the email. There is no limit to how many videos can be included and you can choose not to include any videos.

Click SAVE. bLink Pro will now send this email to all patients with this appointment type scheduled in your Practice Management Software.

To edit an already existing Patient Education Email

Simply click the EDIT button from the Patient Education Email screen, make your changes and click SAVE at the bottom of the page.

You can also DELETE an entire Patient Education Email\ by clicking the DELETE button from the Patient Education Email screen.

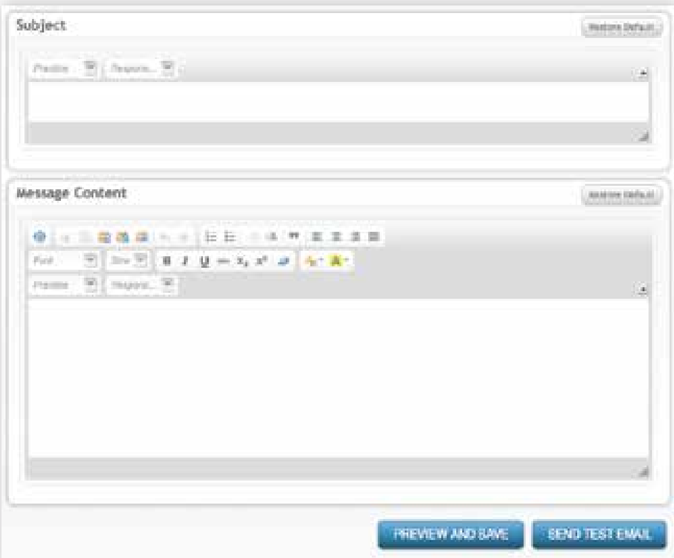
Mass Emails

Need to notify all of your patients all at once? Use the Mass Email feature. This one time email will be sent to all Financial Responsible Parties in your Practice Management Software.

Email Design Settings

The drop down displays a list of the design templates available for the background of the email.

Note: to review the design, select it form the drop down menu then click on PREVIEW AND SAVE at the bottom of the page.



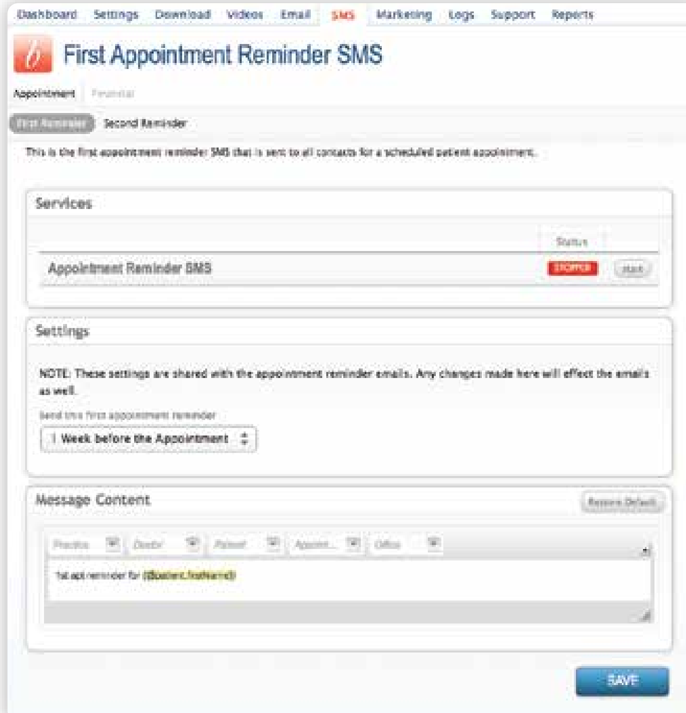
Type a subject line for your email and message content. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but when the message is sent the text will display normally.

Click **SAVE.** bLink Pro will **IMMEDIATELY** begin sending this email to all Financial Responsible Parties in your Practice Management Software.

SMS

- **Edit Appointment Reminder Text Message Content & Settings**
- **Edit Late Payment Email Message Content & Settings**

All of the SMS or text message settings are located under each sub tab and follow the same formatting guidelines as the email messages. You can use our default messages or you can customize each to your preferred script.



First Appointment Reminder SMS

The First Appointment Reminder SMS is sent to the Financial Responsible Party's cell phone number and any additional contacts that have been added to the patient's bLink Pro Notification settings.

Settings
This default setting is set prior to going live with your bLink Pro service and any later changes will ONLY apply to NEW patients. This is a general setting for your practice that can be overridden by individual settings selected by Financial Responsible Parties though their Patient Portal.

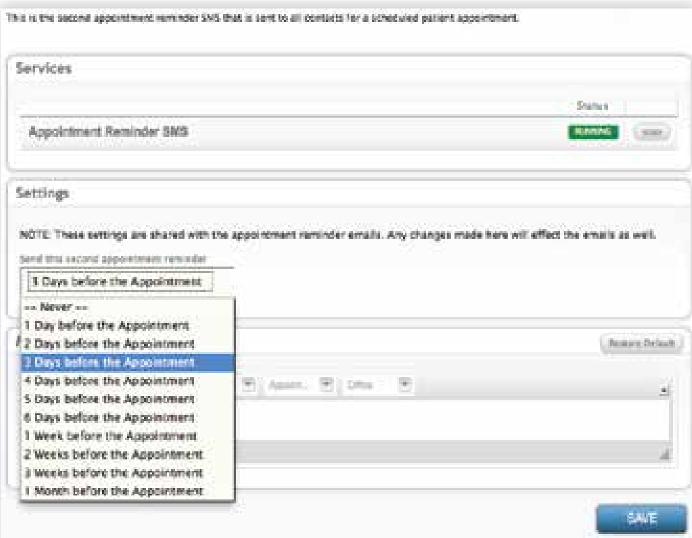
Feel free to use our default message, make changes or create an entirely new message. Due to some hone carriers not supporting certain design elements, the SMS message only contain text in a simple font that is compatible with all cell phone services. You are able to still utilize the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but when the message is sent it will display normally. Since there are no images or formatting options there is no PREVIEW option for SMS messages. Simply click the **SAVE** button when you are satisfied with the message.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Second Appointment Reminder SMS

The Second Appointment Reminder SMS is sent to the Financial Responsible Party's cell phone number and any additional contacts that have been added to the patient's bLink Pro Notification settings.

Settings
This default setting is set prior to going live with your bLink Pro service and any later changes will ONLY apply to NEW patients. This is a general setting for your practice that can be overridden by individual settings selected by Financial Responsible Parties though their Patient Portal.



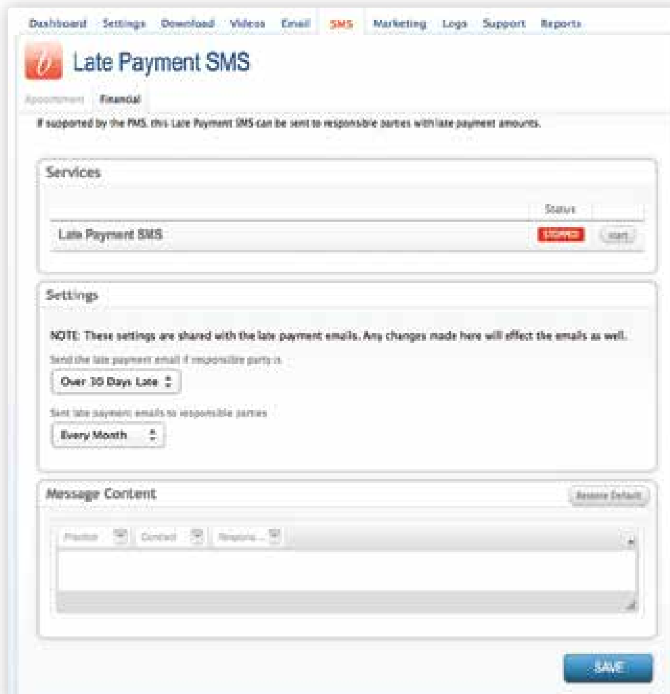
Feel free to use our default message, make changes or create an entirely new message. Due to some hone carriers not supporting certain design elements, the SMS message only contain text in a simple font that is compatible with all cell phone services. You are able to still utilize the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but when the message is sent it will display normally. Since there are no images or formatting options there is no PREVIEW option for SMS messages. Simply click the **SAVE** button when you are satisfied with the message.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Financial SMS

The Financial SMS is sent to the Financial Responsible Party when an account is past due according to the records in your Practice Management Software.

Settings
The first drop down menu allows you to select how late the account must be to be considered past due.
The second drop down menu allows you to select how often you want the text message sent until the account is current according to your Practice Management Software.



Feel free to use our default message, make changes or create an entirely new message. Due to some hone carriers not supporting certain design elements, the SMS message only contain text in a simple font that is compatible with all cell phone services. You are able to still utilize the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but when the message is sent it will display normally. Since there are no images or formatting options there is no PREVIEW option for SMS messages. Simply click the **SAVE** button when you are satisfied with the message.

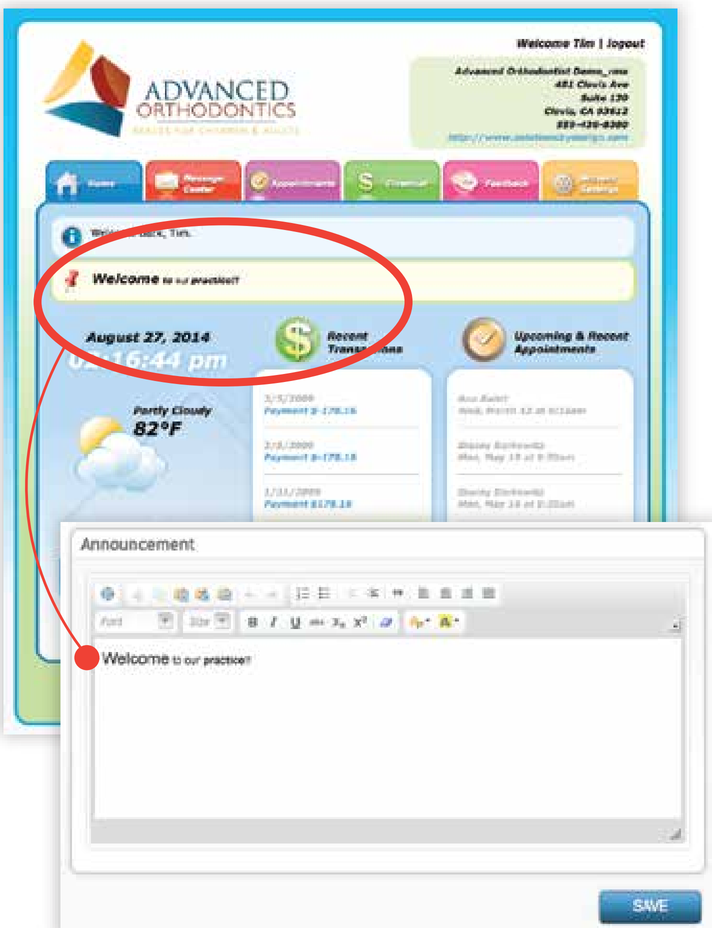
If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Marketing

- **Patient Portal Announcement**
- **Birthday Email**
- **Birthday SMS**

Patient Portal Announcement

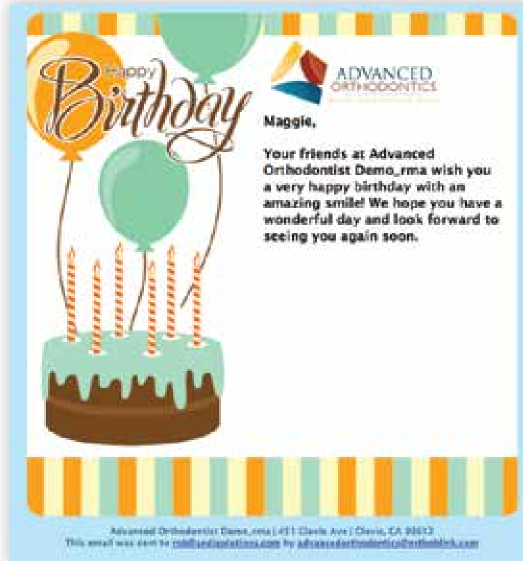
The Announcement is a message displayed at the top of every page of the Patient Portal.



Type any message that you wish your patients to see upon opening their Patient Portal. This feature can be used to announce new office hours, specials, contests, etc.

Note: If there is nothing typed in the Announcement area, no yellow box will appear in the Patient Portal, even if the Announcement Service is RUNNING.

Birthday Messages



The Birthday Email is sent to the Financial Responsible Party and any additional email contacts that have been added to the patient's bLink Pro Notification settings on the patient's birthday.

Feel free to use our default message, make changes or create an entirely new message. You can use the provided options to enhance your Email signature such as font, size, bold, font color, etc. Again you will notice the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but upon previewing the message the text will show normally. To see how the email will look to your patients, click on the **PREVIEW AND SAVE** button. This is exactly what your patients will see upon opening the email. If you like the way it looks click **SAVE**.

There is also a **SEND TEST EMAIL** button which sends an email example to the email address used to sign into ANDI.

Note: You must preview any changes, and then SAVE to update the message settings.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Birthday SMS

The Birthday Email is sent to the Financial Responsible Party's cell number and any additional SMS contacts that have been added to the patient's bLink Pro Notification settings on the patient's birthday.

Feel free to use our default message, make changes or create an entirely new message. Due to some phone carriers not supporting certain design elements, the SMS message only contain text in a simple font that is compatible with all cell phone services. You are still able to utilize the Token drop down menus, which pull info directly from your PMS. They will appear highlighted and within brackets, but when the message is sent it will display normally. Since there are no images or formatting options there is no PREVIEW option for SMS messages. Simply click the **SAVE** button when you are satisfied with the message.

If you save changes and want to revert back to our default message click the Restore Default button. This will re-load our default message and wipe out any changes you had made.

Logs

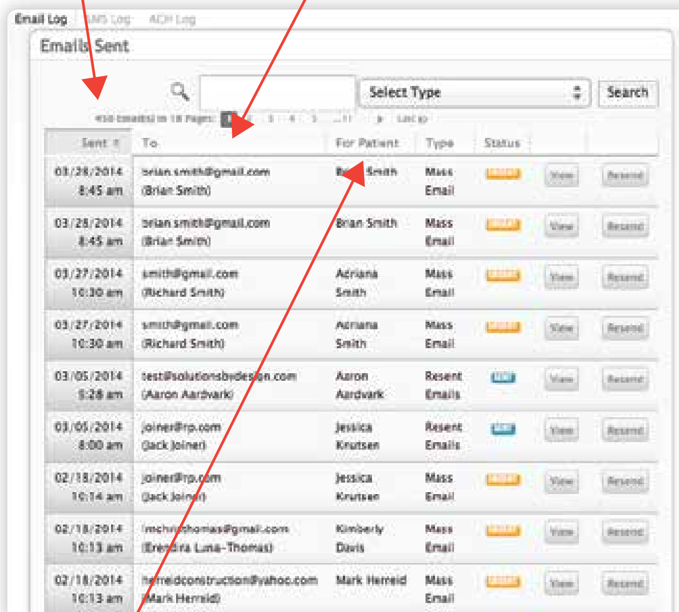
- **Review log of all bLink Pro Email messages**
- **Review log of all bLink Pro SMS messages**
- **Review log of all ACH payments**

Email Log

This is a list of all the email messages that bLink Pro has sent in the last six (6) months.

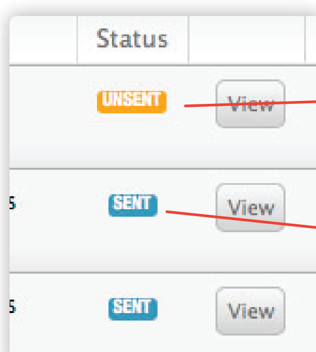
You can click on any of the column titles to sort by that field, click twice to change the order from descending to ascending.

To navigate the multiple pages click on the arrows or specific page number at the top of the section.



You have search options available to help you locate a specific email. Type in the patient's name, Financial Responsible Party's name or email address and select from the drop down menu the message type and click on search.

Status Codes

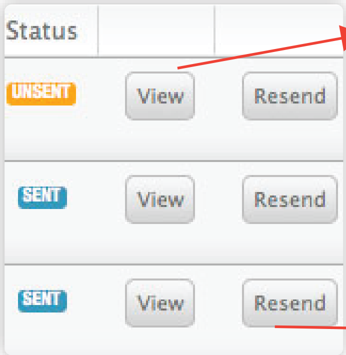


The message is waiting in the queue to be sent.

The message was successfully sent.

.

You should only see this status while in Test Mode.



Click on the View button to see the error message.

The View button shows you exactly what the patient received in their email inbox.

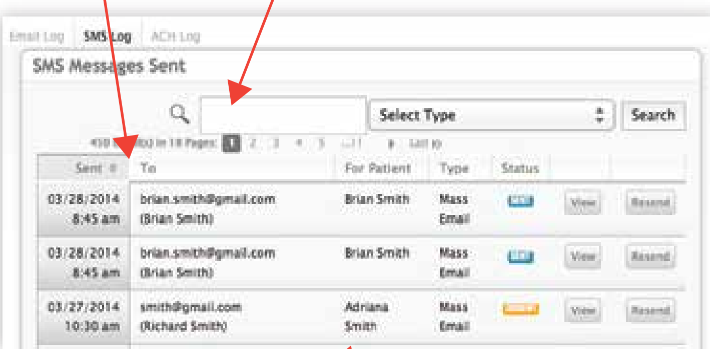
The Resend button resends the message to that specific email address.

SMS Log

This is a list of all the SMS messages that bLink Pro has sent in the last six (6) months.

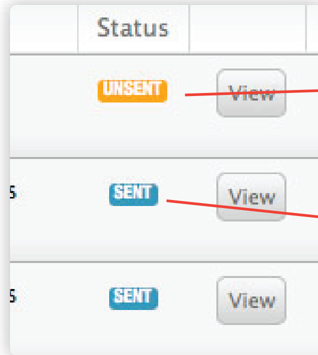
You can click on any of the column titles to sort by that field, click twice to change the order from descending to ascending.

To navigate the multiple pages click on the arrows or specific page number at the top of the section.



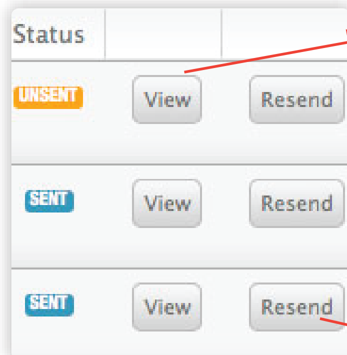
You have search options available to help you locate a specific text message. Type in the patient's name or Financial Responsible Party's name and select from the drop down menu the message type and click on search.

Status Codes



The message is waiting in the queue to be sent.

The message was successfully sent.



Click on the View button to see the error message.

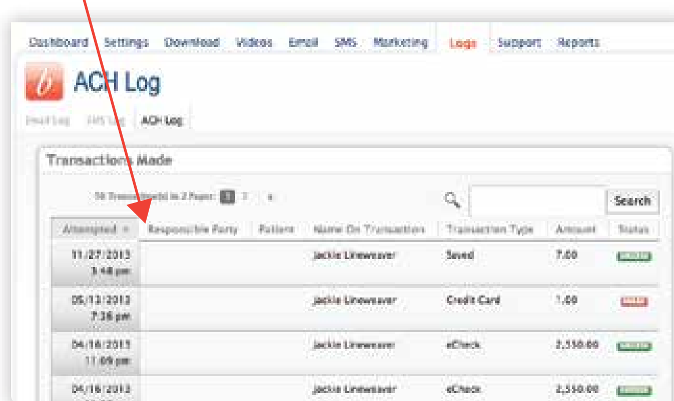
The View button shows you exactly what the patient received in their email inbox.

The Resend button resends the message to that specific email address.

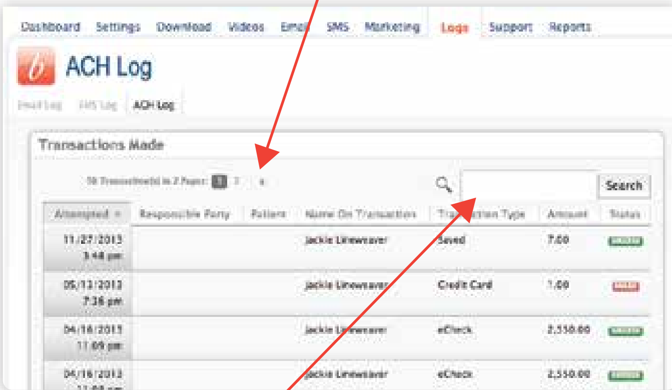
ACH Log

ACH stand for **Automated Clearing House** and refers to online payments made by your patients through their Patient Portal. This is a list of all the online payments processed through bLink Pro last six (6) months.

You can click on any of the column titles to sort by that field, click twice to change the order from descending to ascending.



To navigate the multiple pages click on the arrows or specific page number at the top of the section.



You have search options available to help you locate a specific transaction. Type in the patient's name, Financial Responsible Party's name or card holder's name and click Search.

Status Codes

Transaction Type	Amount	Status
Saved	7.00	SUCCESS
Credit Card	1.00	FAILED
eCheck	2,550.00	SUCCESS

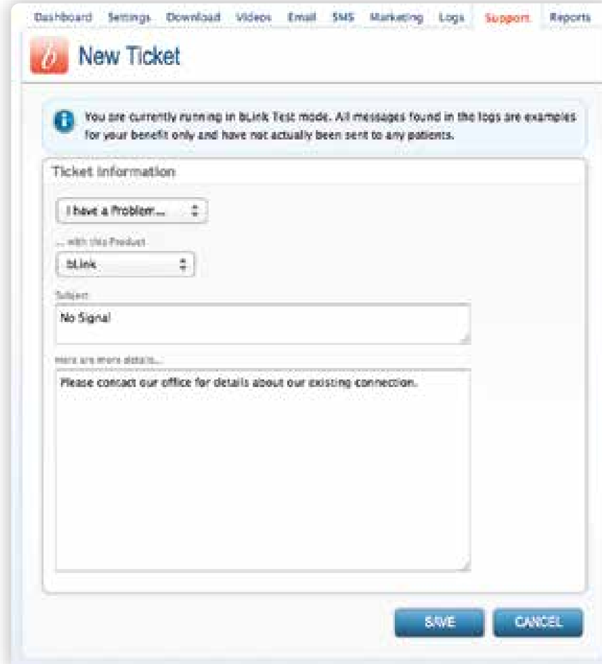
The payment was processed.

The payment did not process correctly.

Contact Solutions by Design for further details.

Support

This allows you to send a message to the Solutions by Design Support Team.



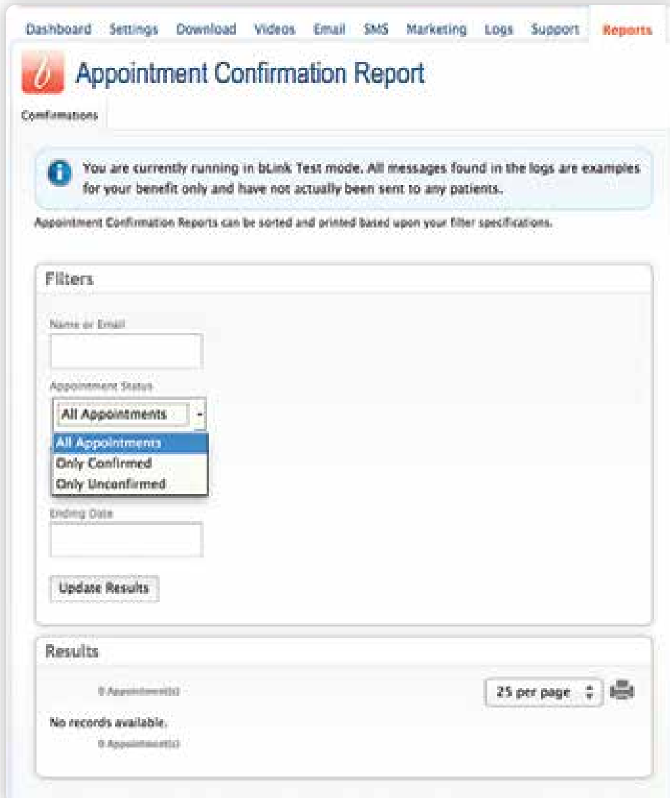
- Click New Ticket to create a message.
- The Account field will automatically populate with your practice's account name so we know who the message is from.
- Select the message type.
- Select the Product.
- Type a Subject and message details then click SAVE to send the message to one of our Support Team. A technician will then reply via email or call your office to offer assistance.

Reports

Review the confirmation status of all future appointments. Remember that green Confirmation button included in your First and Second Appointment Reminders? This where bLink Pro keeps track of everyone who has confirmed from those Appointment Reminder Emails. This report can be filtered by the following criterias:

- **Patient Name**
- **Financial Responsible Party Name**
- **Appointment Status**
- **Specific Starting and Ending Dates**

Once you have selected your filter criteria(s) click Update Results to refresh the page.



You can click on any of the column titles to sort by that field, click twice to change the order from descending to ascending. You can select how many results you wish to display and the printer icon allows you to print the report.

Note: the Action column is purposely left blank to allow space for written notes when the report is printed.

bLink®

INSTANT WEB-BASED PATIENT COMMUNICATION

Doctor Portal

This is a user-friendly web-based interface that you access by clicking on a downloaded shortcut or your website Patient Login button. You will be able to check messages sent from your patients from their Patient Portal, make changes to notification settings for your patients and access On Demand videos.

Note: When logging into your Doctor Portal use the same credentials as your ANDI account.

bLink Doctor Portal

Home Tab

- The time and weather are based on the location entered in your ANDI account.
- The feed includes current posts regarding bLink Pro and its features such as updates, announcements, content changes, etc.
- The News feed is streaming news and events from the list of providers located at the bottom of the post area.
- Click on the down arrow to switch feed providers. We are planning on continually adding additional RSS feeds.
- The Live Support link allows you to chat online with our support staff. When one of our Support Technicians is available the “on-line” indicator will display.
- The Send Support Email is a quick link to send our Support Team an email.

Message Center

The Message Center lets you know if you have any new messages from your patients. Click on the red Message Center Tab to view these messages.

Compose – Write a message to your patients. Start typing in the patient's last name and the program will begin listing patients. Select from the drop down which patient and it will automatically list emails you have on file for that patient. You can then type in a subject, message, include any of the On Demand Videos and then click Send.

Inbox – displays messages from your patients. Click the red View button to view the complete message.

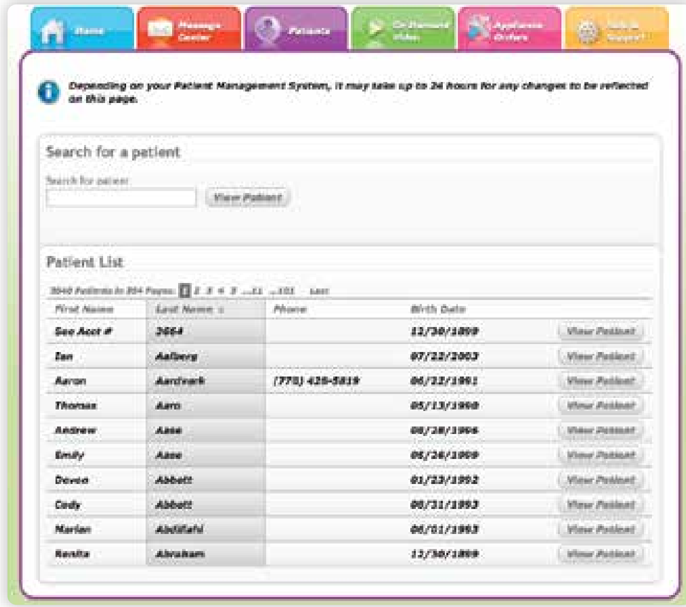
Sent – displays messages that you have sent to your patients. Click the red View button to view the complete message.

The grey **New Message** button directs you to the Compose tab to create a new message.

Patients

The Patients Tab gives you access to your patient accounts within bLink Pro. From here you can view the patient's account information, appointment history, transaction history (online payments), and current notification settings.

You can even make changes to a patient's notification settings if they are unable to do so themselves in their Patient Portal. This comes in handy for those patients that are not very tech savvy or maybe don't have internet access.



Note: Changes to the notification settings in BLink Pro DO NOT transfer back to your Practice Management Software.

On Demand Video

There are 3 tabs for videos: Care & Use, Compliance and Procedures.

- **Care and Use** refers to videos on the care and use of specific appliances.
- **Compliance** videos demonstrate to the patient how to comply with the clinical guidelines.
- **Procedure** videos provide treatment animations for a variety braces types, removable appliances, fixed appliances, extraction and surgical cases.

On Demand video allows you to play any of the selected educational videos instantly for patient chair-side presentation. Just click on the red Play button to the right of the video description.

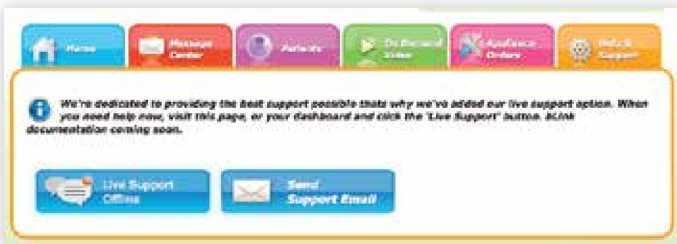
Note: To add or remove videos for your On Demand library, refer to Video Settings through ANDI.

You also have the option of emailing the video home for the patient by clicking the Email button. A new screen will open. Start typing in the patient's last name and the program will begin listing patients. Select from the drop down which patient and it will automatically list emails you have on file for that patient. You can then type in a subject and message to accompany the video and then click Send.

Help & Support

The Live Support link allows you to chat online with our support staff. When one of our Support Technicians is available the "on-line" indicator will display.

The Send Support Email is a quick link to send our Support Team an email.



Patient Portal

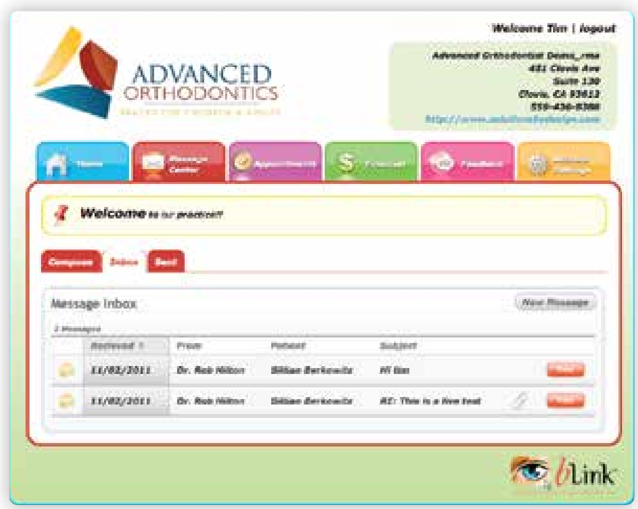
bLink Patient Portal

The Patient Portal includes the same weather feed, a quick link to complete a practice survey and a link to correspond via email with your office. A Recent Transactions and Upcoming Appointment register is also displayed *(if these features have been enabled by the practice)*. Any messages sent using the Doctor Portal are accessed through the patient's Message Center shortcut on the dashboard.

The bLink Pro patient interface is user friendly and very easy to navigate. Within the Patient Portal patients will be able to:

- Review messages sent using the practice's Doctor Portal including videos and send messages to the practice's Doctor Portal
- Review their upcoming and recent appointments
- Check their account balance (if this feature is enabled by the practice)
- Make a payment on their account and review their online payment history (if this feature is enabled by the practice)
- Submit a Patient Survey
- Change their password
- Personalize their notification settings including the frequency of email and text reminders, and add additional email addresses and cell phone numbers

Message Center



Compose - Allows your patients to send a message to your Doctor Portal. Select from the drop down which patient the message pertains to, type in a subject, type the message, and then click Send.

Inbox – displays messages from your Doctor Portal to the patient. Click the red View button to view the complete message.

Sent – displays messages that your patient has sent to your Doctor Portal. Click the red View button to view the complete message.

The grey **New Message** button directs to the compose tab to create a new message.

Appointments

This displays both upcoming and past appointments for the patient. They can click on any of the column titles to sort by that field, click twice to change the order from descending to ascending.

Financial

This section is governed by the bLink Pro services enabled by the practice in ANDI.

Patients are able to **view their financial details, make an online payment and view their online payment history** (if these features are enabled by the practice).

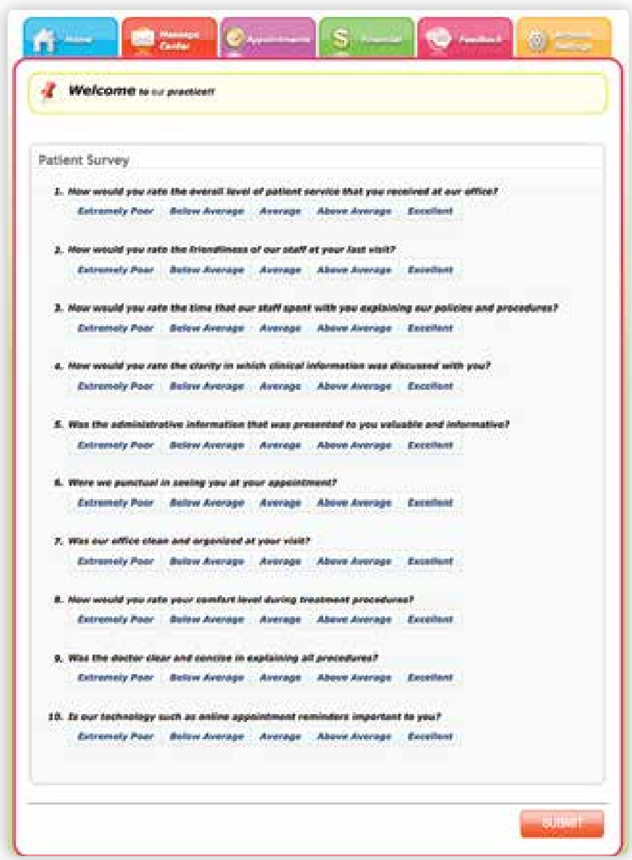
Each Practice Management Software and Payment Processor varies on the details displayed. Contact Solutions by Design for specific information pertaining to your Practice Management and Payment Processor.

COMING SOON!

Feedback

Patients are able to submit an anonymous survey regarding the practice overall as well as their latest visit using a scale system ranging from Extremely Poor to Excellent.

Note: the survey consists of 10 standardized questions. We plan to add customizable survey in a future update.



Account Settings

Patients have control over their notifications settings and can override the practice's default settings to better fit their communication needs. Patients can change their bLink Pro login password. This does not effect any other password associated with your practice and is not recorded in ANDI or your PMS.

Email Notifications

Patients can review what email address are currently being used for bLink Pro notifications. They can edit, remove and add additional contacts.

Select the patlent the email address pertains to, enter the new email address and select when they want to receive the different notifications.

Note: the Appt. Confirmation is the initial appointment email that is normally sent when an appointment is added to your PMS.

By checking the "I only wish to receive appointment reminders" box, all other bLink Pro notifications such as Birthday, No Show, Financial, Mass Email, etc. will NOT be sent this email address.

Text Message Notifications

Patients can review what cell phone number are currently being used for bLink Pro notifications. They can edit, remove and add additional contacts.

Select the patient the cell phone number pertains to, enter the new number and select when they want to receive the different notifications. Remember to include the area code.

By checking the "I only wish to receive appointment reminders" box, all other bLink Pro notifications such as Birthday and Financial will NOT be sent this cell phone number.

COMING SOON: ETOONS MODULE

We are developing a series of animated cartoon videos which can take the place of traditional messages.

Ask your sales rep for information and availability.