How to Use the DXS Built-in Email Client

SystmOne

A guide on how to use the DXS built-in email client

Content

1. Introduction

This document outlines the steps required to send an email using the DXS built-in email client. Configuration can be set up on a per-user basis or practice-wide to align with the process used by your practice to manage email referrals.

2. Using the DXS Email Client to Send an Email

When you are ready to email the referral form from DXS please click the "Email" button located on the DXS Toolbar:

Figure 1: The Email Button Located in DXS

A confirmation box will appear asking if you would like to "Mark Form as Complete". Marking the form as complete removes the "Draft" watermark. The below image shows the default settings.
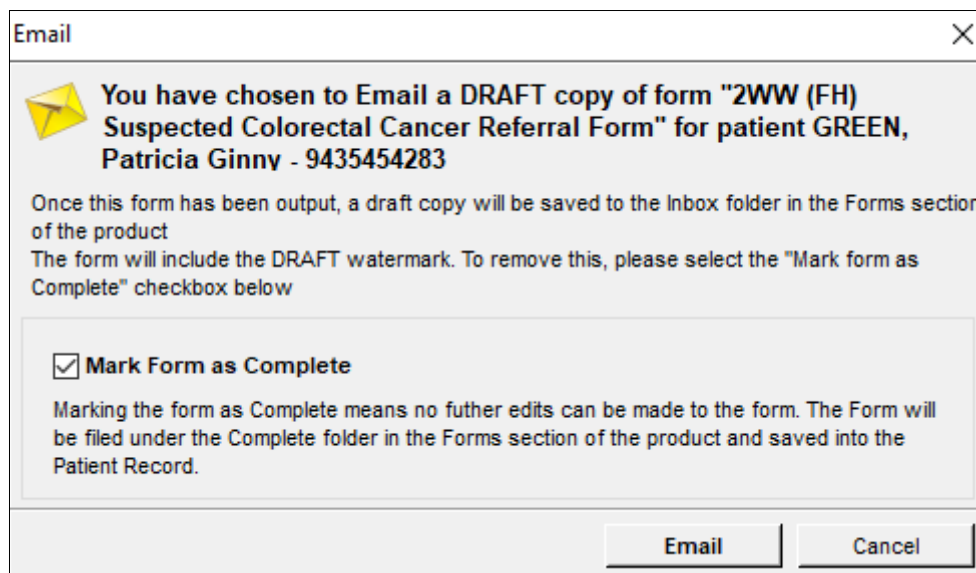

Figure 2: Marking a Form as Complete

NB. If for some reason you need to email the form as a draft BEFORE it is completed, please untick the checkbox.

It is recommended that all required fields are filled out before emailing the form.

You may email the form as is, but please be aware that the form may be rejected by the Service Provider.

Informational boxes may appear offering to add the entry to your PDP log.

NB. Ticking the "Do not prompt again" box will ensure that you do not see this message in the future. You only have to tick this box once.

A message advising you that the form is saving to the patient record will appear while DXS in running in the background.
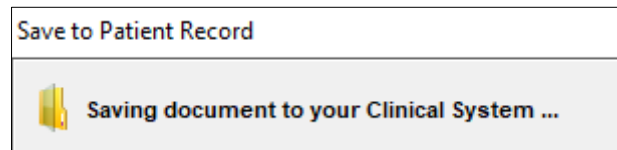

Figure 3: Saving Form to Patient Record

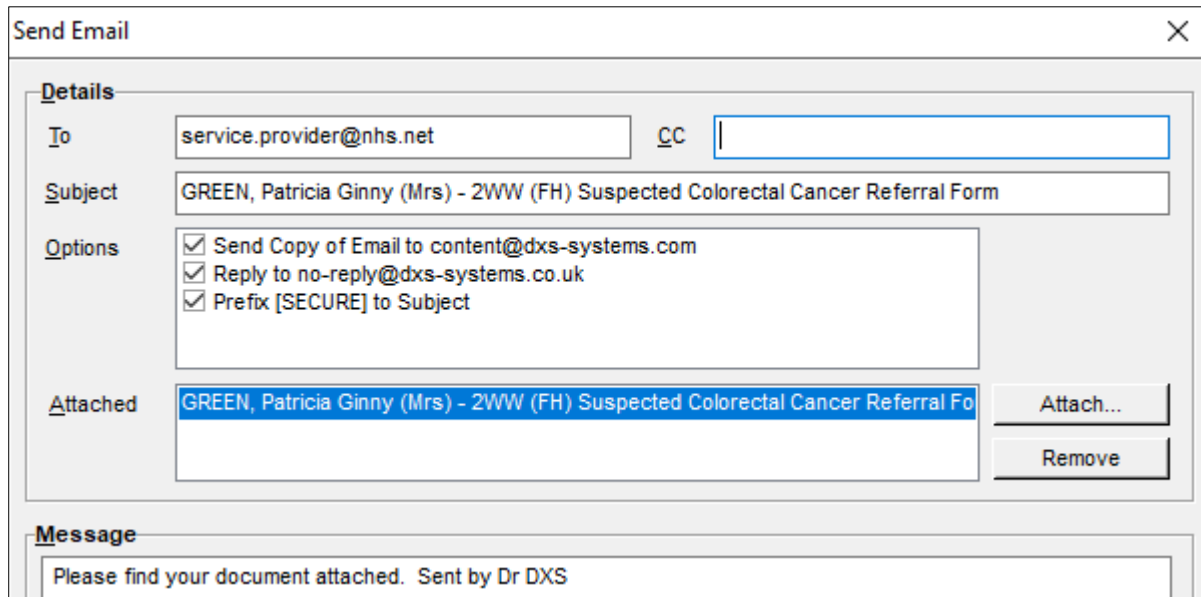When the form has been saved successfully, the "Send Email" window will be displayed.

Figure 4: Sending the Form per Email

All the features shown here are explained on the following pages.

2.1   Automatic populating of "To" field

If the Service Provider has specified an email address to which the referral can be sent, the address will automatically be populated into the "To" field. This will circumvent having to manually add the address, therefore avoiding mistyped email addresses.

If the referral form can be sent to multiple Service Providers then the "To" field will be blank.
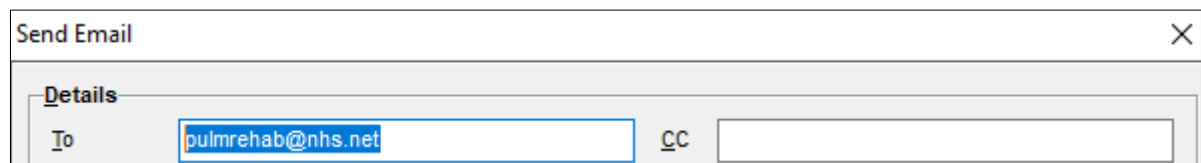

Figure 5: Populated "To" Field

2.2   Options

The DXS email client provides you with the opportunity to deselect certain options before sending the email. Simply find the option which you regard as unnecessary and untick the checkbox next to it. The changes made will only be applied to the current email.

- **"Send Copy of Email to"** – the name of the email account that the DXS email client has been configured with
- **"Reply to"** – the address to which replies will go (if configured)
- **"Prefix [SECURE]"** – the option to send the email with encryption to non-NHS email accounts (if configured)
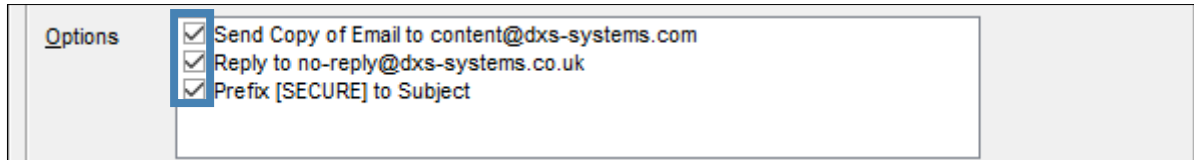

Figure 6: Selecting and Deselecting for Current Email

2.3   Attaching files

You can choose to attach supplementary documents to your email referral, including DocMan file extensions (.TIF.xx2) saved to disk.

1. Click the "Attach" button.
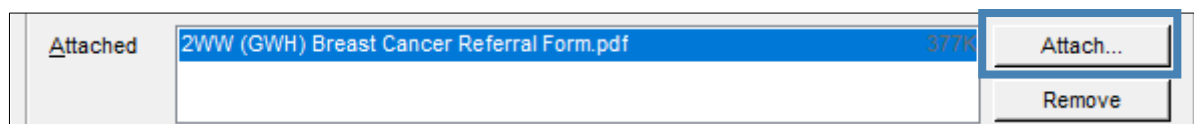

Figure 7: The Attach button in DXS

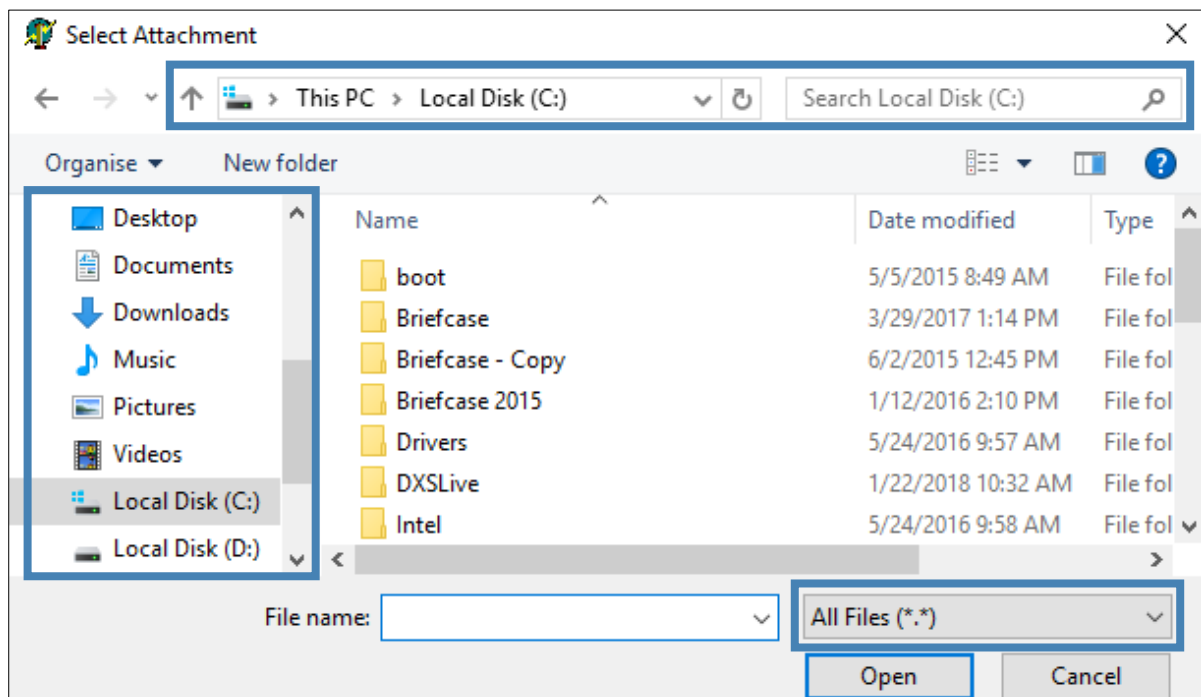2. The "Select Attachment" window will appear.

Figure 8: Selecting an Attachment

3. Select the location where your file is stored by using the standard file explorer icons (outlined above).

4. Click the "Files of Type" drop-down (outlined above) and choose the file type you require. It is set to "All Files" by default, but you may narrow your search by selecting, for example, "DocMan Files", as illustrated below.
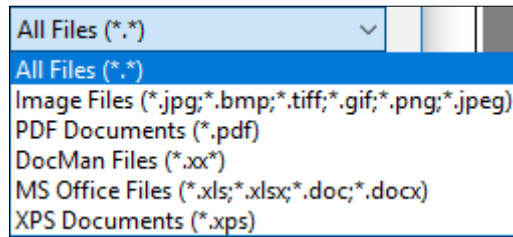
All Files (*.*)

All Files (*.*)
Image Files (*.jpg;*.bmp;*.tiff;*.gif;*.png;*.jpeg)
PDF Documents (*.pdf)
DocMan Files (*.xx*)
MS Office Files (*.xls;*.xlsx;*.doc;*.docx)
XPS Documents (*.xps)

Figure 9: Type of Files

5. The filtered list of files will now show in the main pane, outlined in the screenshot below.

Select Attachment

← → ∨ ↑ 📄 > This PC > Documents   ∨ ⟳   Search Documents   🔍

Organise ▼   New folder   📜 ▼   🔲   ❓

Name	Date modified	Type
Camtasia Studio	2/2/2018 10:25 AM	File fo
Custom Office Templates	3/14/2016 9:22 AM	File fo
Data	12/21/2017 2:05 PM	File fo
DXS Media	1/3/2018 9:52 AM	File fo
iFree Skype Recorder	5/12/2017 9:30 AM	File fo
Meeting Minutes	3/14/2016 12:22 PM	File fo
My Received Files	1/10/2018 2:25 PM	File fo

Desktop
Documents
Downloads
Music
Pictures
Videos
Local Disk (C:)
Local Disk (D:)

File name: | ∨   All Files (*.*)   ∨
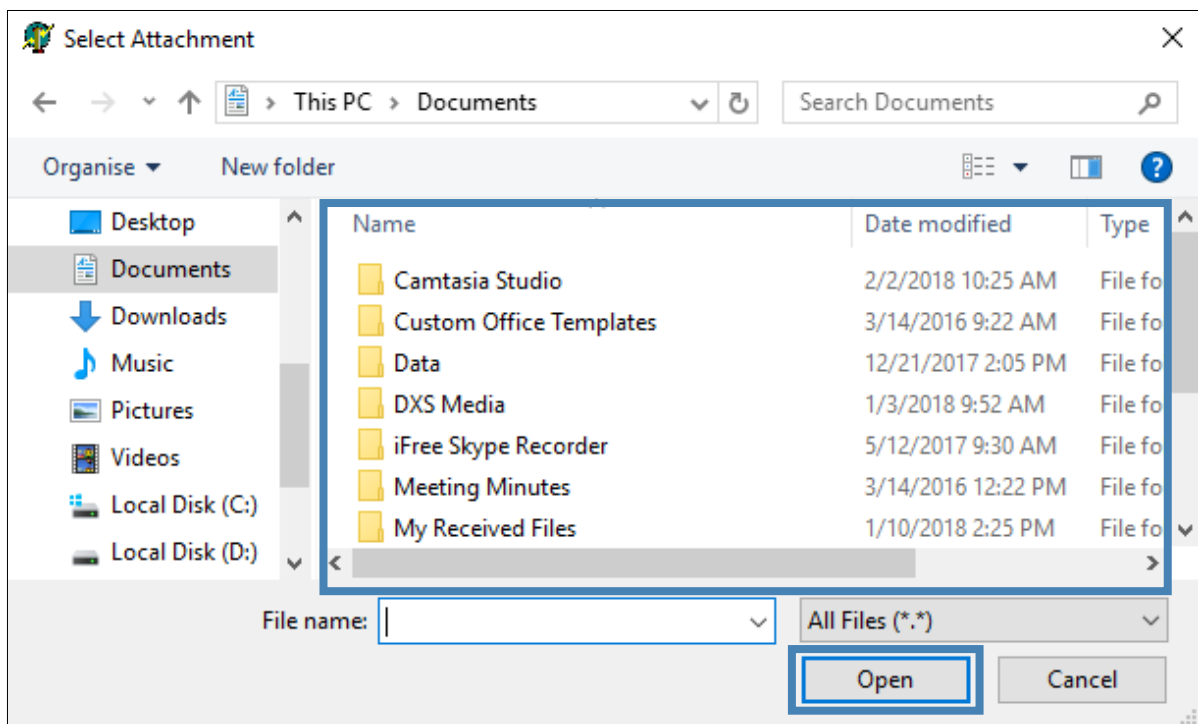
Open   Cancel

Figure 10: Filtered List of Files

6. Please select the file you wish to attach and then click the "Open" button.
7. The file that has been selected will now appear in the list of "Attached" files on the Send Email window. To attach additional files please repeat steps 1 to 6.
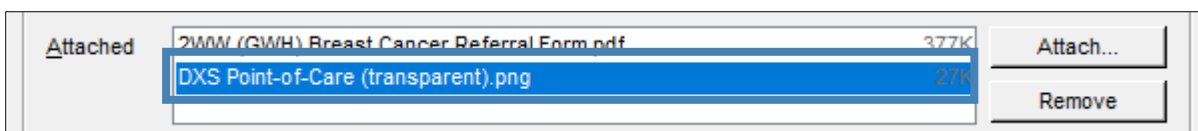
Attached   2WW (GWH) Breast Cancer Referral Form.pdf   377K   Attach...
            DXS Point-of-Care (transparent).png   27K
                                                                      Remove

Figure 11: Selected File to be Attached

8. When all the files have been attached click the "Send" button to send the email.

Send   Cancel

Figure 12: Sending the Email

2.4   Email sent confirmation

A notification will appear stating "Your email was successfully sent" to confirm that the email has been sent.
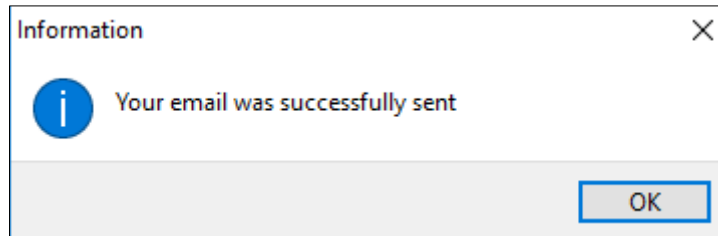

Figure 13: Confirmation Dialogue Box

Simply click "OK" when you are ready to move on.

3. DXS Support

3.1   Problems?

If you are having any problems regarding using the DXS email client or experiencing any technical issues with DXS Point-of-Care, please get in touch with our service desk and one of the members of our team will be more than happy to help you.

✉   **support-uk@dxs-systems.com**
☎   **0800 028 0004** option 1

3.2   Service desk hours of operation

Monday–Friday	07:30–19:00
Saturday	09:00–13:00
Sunday	Closed

3.3   DXS Training

To view more DXS Training Guides visit our training website at http://training.dxs-systems.com/.