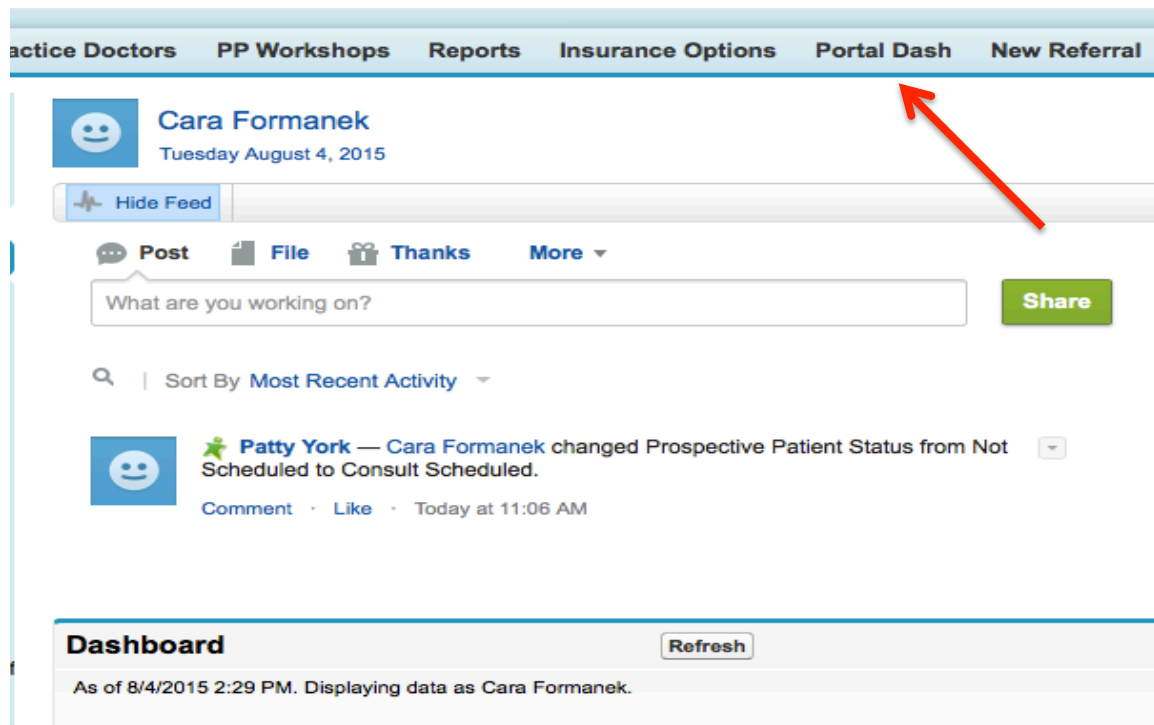


Using the Chatter Feed

1. To access the Chatter Feed login into SalesForce and click “Portal Dash” on the toolbar of your home page.



2. Once your Portal Dash opens there will be a list a patients you have referred, find the patient that you want to post information about and click on the patients name or simply search their name in under the **Referral Name bar**.

Home Dental Practices Practice Doctors PP Workshops Reports Insurance Options **Portal Dash** New Referral +

Displaying Info for : All Partner Practices Show Center View

Referral Name : Start Date : Referral Track : Any Track Search Referrals

Clinical Status : Any Status End Date : Records Per Page : 25

Referral Summary

	# Patients	Anticipated GP Fee	Close Rate	Lead-Consult Rate
YTD	25	\$ 10,165.44	62.50 %	32.00 %
Lifetime	25	\$ 10,165.44	62.50 %	32.00 %

Referral Details

Name	Referral Date	Contacts	Clinical Status	Treatment Plan	Track
<u>Lisa Avrett</u>	7/28/2015	2	Consult - No Show	N/A	N/A
<u>Test Referral 2</u>	7/27/2015	0	Lead Referred	N/A	N/A
<u>First Referral</u>	7/27/2015	6	Consult Incomplete	AO4 Upper	Track II
<u>Second Test Referral</u>	7/23/2015	0	Lead Referred	N/A	N/A
<u>new referral</u>	7/23/2015	6	Consult Incomplete	AO4 Upper	Track II

3. The chatter feed for that specific patient will open and it looks like this.

Search... Search

Practice Doctors PP Workshops Reports Insurance Options **Portal Dash** New Referral +

Prospective Patient **Patty York** Customize Page | Edit Layout | P...

Hide Feed

Post File Thanks More

Write something... Share

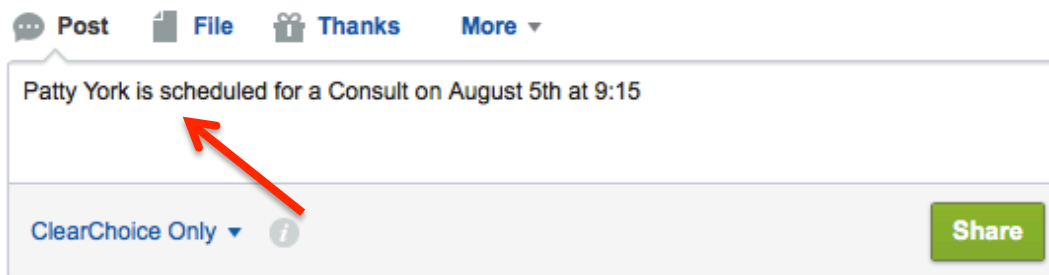
Following Followers Show All (1)

Show All Updates

Cara Formanek changed Prospective Patient Status from Not Scheduled to Consult Scheduled.

Comment Like Today at 11:06 AM

4. To post something to that patient specific feed, simply click “Post” and where it says, “*Write something...*” Click inside that box. Type updates, questions, or anything that you want ClearChoice to see.



5. Once you have clicked the green button “Share,” the post will be shared on the main chatter feed.

