Ms A Dentist
1 Caries Road
Toothton
Brushshire
A12 3BC

Our Reference: ORT-123456
Contract: 1234560001

Date: 01 January 2025

Orthodontic Clinical Assessment

Dear Name,

As part of our routine orthodontic clinical monitoring procedures, we request that you submit clinical records for the following patients:

Patient Surname	Patient Forename	Date of Birth	Performer Number
PatientSurname	PatientForename	DD/MM/YY	123456
PatientSurname	PatientForename	DD/MM/YY	123456
PatientSurname	PatientForename	DD/MM/YY	123456
PatientSurname	PatientForename	DD/MM/YY	123456
PatientSurname	PatientForename	DD/MM/YY	123456

If you did not provide treatment for any of these patients, please record this information when completing the Orthodontic Case Assessment (OCA) form.

All documents must be submitted electronically within 28 days of receiving this letter.

Clinical information required

You must complete an individual OCA form for each patient.

OCA forms are available on our website. You can complete these digitally by saving a copy for each patient and filling in the text boxes. Alternatively, you can print and complete the OCA forms before scanning them for digital submission.

For each patient you must also submit digital copies of:

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- all relevant radiographs
- any relevant pre- and post-treatment photographs
- 3D pre- and post-treatment study models
- the clinical records including the FP17DCO.

Which formats we accept

NHS Dental Services no longer accepts physical records, **all documents must be submitted electronically**.

We can only accept digital records sent in the following formats:

- radiographs and photographs: JPEG, BMP, PNG, and/or GIF,
- 3D study models: STL
- Documents: TXT, DOC, and/or PDF,
- Zipped files and folders: ZIP and/or RAR

If necessary, you can copy these requirements to send to your laboratory.

How to send us your documents

You must send your records to us using Egress. Egress is a secure platform for sending patient records.

When you have completed your OCA forms and collected all supporting documents:

- Log into Egress and navigate to your folder
- select 'Create New' then 'New Folder' to create separate sub-folders for each patient
- in each new sub-folder and select the 'Upload' button to the top-right of the screen
- upload the requested documents for each patient

Watch Egress user guidance on our YouTube channel.

Once all documents have been uploaded, NHS Dental Services will be notified automatically and can start your orthodontic clinical assessment.

If you have any questions, please contact orthosupport@nhsbsa.nhs.uk

Yours sincerely

Orthodontic Team
NHS Dental Services