

Ms A Dentist  
1 Caries Road  
Toothton  
Brushshire  
A12 3BC

## Getting in Touch

Email : [dsorthoadmin@nhsbsa.nhs.uk](mailto:dsorthoadmin@nhsbsa.nhs.uk)

Website : [www.nhsbsa.nhs.uk/dental](http://www.nhsbsa.nhs.uk/dental)

Tel: 0300 330 1348

Our ref: **ORT-123456** Contract : **1234560001**

Date : **10 July 2025**

## Orthodontic Clinical Assessment

Dear **Name**,

As part of our orthodontic clinical monitoring procedures, we request that you submit clinical records for the patients listed in the appendix to this letter.

If any of these patients did not receive treatment at this contract, please contact NHS Dental Services by email to [dsorthoadmin@nhsbsa.nhs.uk](mailto:dsorthoadmin@nhsbsa.nhs.uk).

**All documents must be submitted electronically within 28 days of the date of this letter.**

## Clinical information required

You must complete an individual Orthodontic Clinical Assessment 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:

- all relevant radiographs
- any relevant pre- and post-treatment photographs
- 3-D STL pre- and post-treatment upper and lower study models, presented separately and in the correct occlusion
- the written 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 files of both upper and lower arches, presented separately and in occlusion
- 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.

Should we not receive your records within the 28 days as stated, we will contact your Integrated Care Board / Local Health Board.

If you have any questions, please contact [dsorthoadmin@nhsbsa.nhs.uk](mailto:dsorthoadmin@nhsbsa.nhs.uk)

Yours sincerely,

**Orthodontic Team**  
**NHS Dental Services**

## Appendix – Patient List

Performer Number	Patient Surname	Patient Forename	Date of Birth
PerformerNumber	PatientSurname	PatientForename	DD/MM/YYYY
PerformerNumber	PatientSurname	PatientForename	DD/MM/YYYY
PerformerNumber	PatientSurname	PatientForename	DD/MM/YYYY
PerformerNumber	PatientSurname	PatientForename	DD/MM/YYYY
PerformerNumber	PatientSurname	PatientForename	DD/MM/YYYY