EXACT PRACTICE MANAGEMENT GUIDE

Scotland

Software of Excellence
Medcare South
Bailey Drive
Gillingham Business Park
Gillingham
Kent ME8 0PZ

+44 (0)845 345 5767

Internet E-Mail: support@soeuk.com
Website: https://softwareofexcellence.co.uk/talk-to-an-expert/
Subscribers' Portal: https://portal.softwareofexcellence.com

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SOE CONNECT

SOE Codes

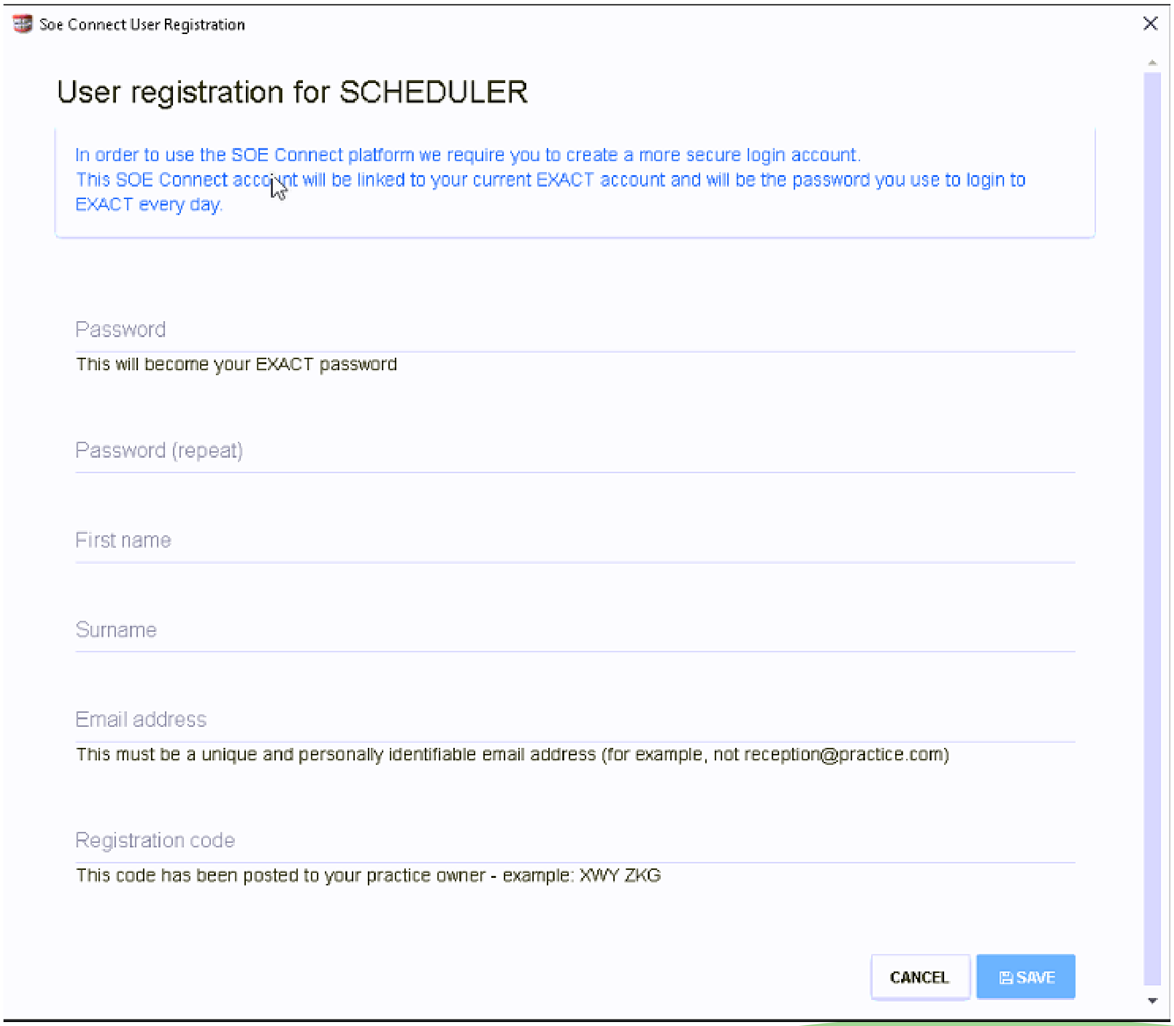
You will have been sent two codes for SOE connect shown in the format below. If you have misplaced your codes please call the support helpdesk on 01634 266 800; you will be required to provide a signed letter on practice headed paper confirming that these codes can be sent to you.

ADMIN: XXX XXX

USER: XXX XXX

When you first login to Exact you will be prompted with a box to register for SOE Connect. Please note each person that registers for SOE Connect will need to use a unique email address and the password which they create will need to be **ATLEAST** eight characters long and contain one non-alphanumeric character.

PLEASE NOTE: If the admin code is used it will give the user full access to Exact.



Soe Connect User Registration

User registration for SCHEDULER

In order to use the SOE Connect platform we require you to create a more secure login account.
This SOE Connect account will be linked to your current EXACT account and will be the password you use to login to EXACT every day.

Password
This will become your EXACT password

Password (repeat)

First name

Surname

Email address
This must be a unique and personally identifiable email address (for example, not reception@practice.com)

Registration code
This code has been posted to your practice owner - example: XWY ZKG

CANCEL SAVE

SOE Connect URL

You can access SOE Connect from any browser using the address format below. Please put your practice ACCPAC in place of 'YOURACCPAC'.

https://YOURACCPAC.soeconnect.net/account/login

In order to access SOE Connect after you have registered in Exact you can use the URL above on your chosen browser to access SOE Connect.

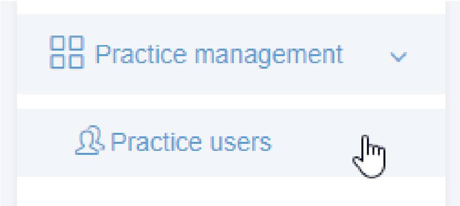
Logging into SOE Connect

Login to SOE Connect with the URL above. Your username and password will be the one that you set up when logging into Exact.

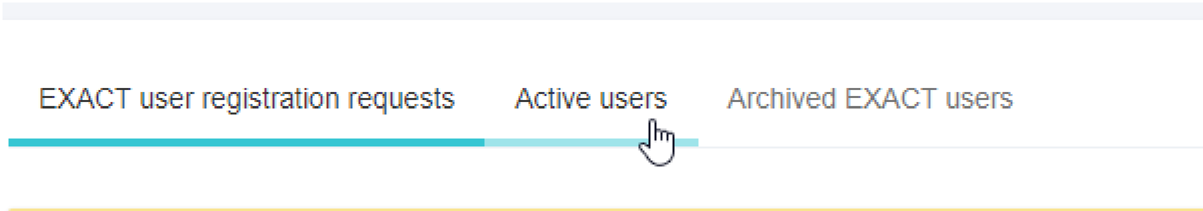
How to add list numbers in SOE Connect

Once a dentist has registered for SOE Connect they may report back that they are not appearing in the claiming dentist drop down when trying to send a PA. In order to make sure they appear in this list please follow the steps below:

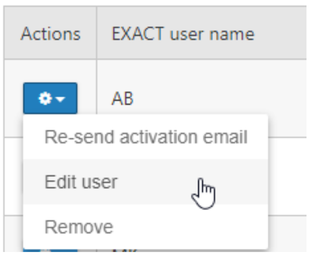
1. Login to SOE Connect with the steps in Logging into SOE Connect
2. Click on 'Practice management' then 'Practice users' in the top left hand side.



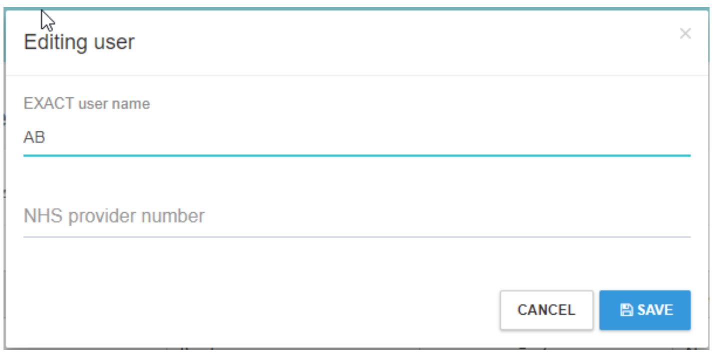
3. Click on 'Active users'



4. Click on the settings clog then select ‘Edit user’



5. On the screen that comes up add the dentists List Number into the ‘NHS provider number’ section then press save.

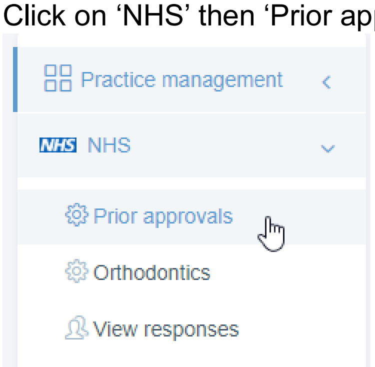


6. The dentist will now show in SOE Connect as a claiming dentist when applying for prior approval.

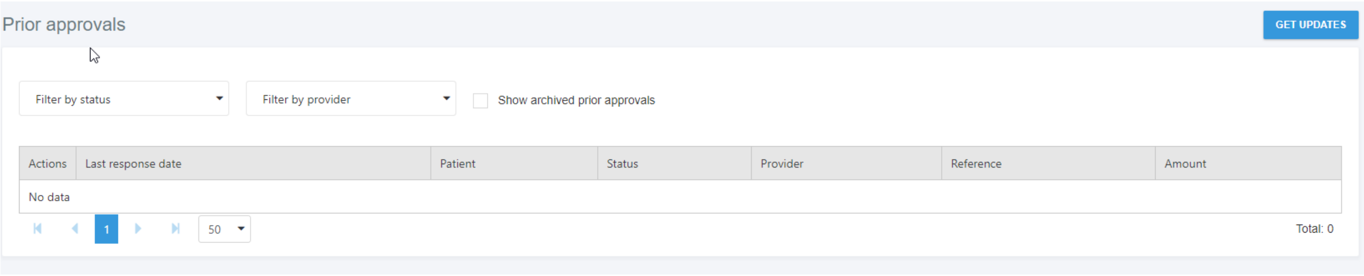
Checking Prior Approvals in SOE Connect

When a prior approval has been started or sent off you can check these in SOE connect.

1. Use the steps in Logging into SOE Connect to log into SOE Connect
2. Click on ‘NHS’ then ‘Prior approvals’



3. You will be shown the screen below. If the dentists at the practice have generated any prior approvals, they will show on this page detailing the patient name, status of the PA, provider that has sent it, COT and the amount that the PA is worth. You can filter at the top of the screen by status i.e. if you just want to view approved claims or by provider. If you are note sure that the information is up to date click on 'GET UPDATES' in the top right-hand corner.



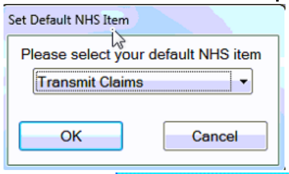
4. If you need to view any PA's that have been archived, you need to click in the box next to 'Show archived prior approvals'

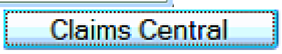
TRANSMISSIONS & RESPONSES

How to Transmit

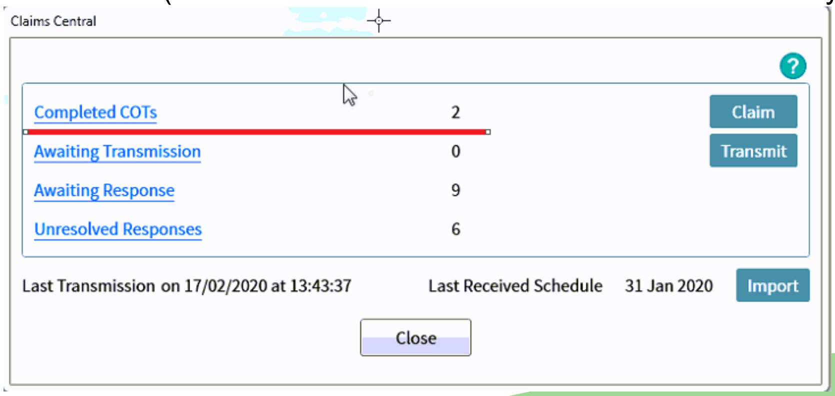
1. Click on the NHS icon on the workspace at the top of Exact

   a. You may be presented with the window shown below ensure 'Transmit Claims' is selected and press OK – this screen will only appear once.

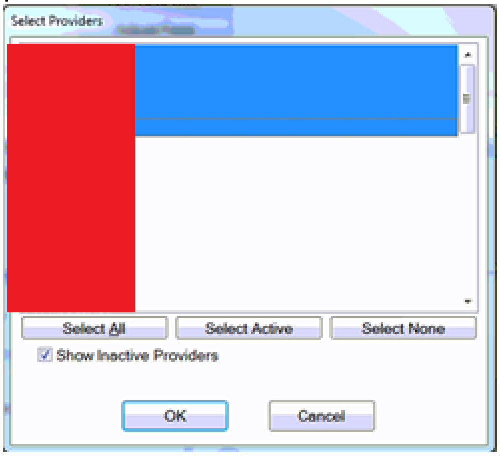


2. Click on 

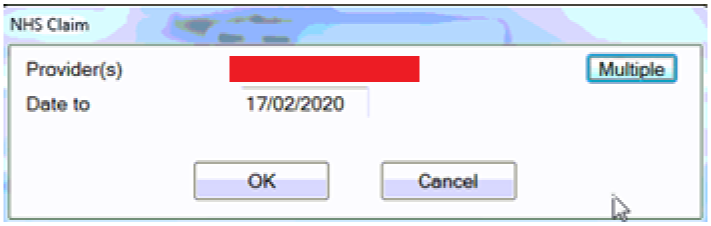
3. From the screen you will see the number of COTs awaiting to be sent on the 'Completed COTS' line. (these are all the claims the dentist has TC'd since your last transmission)



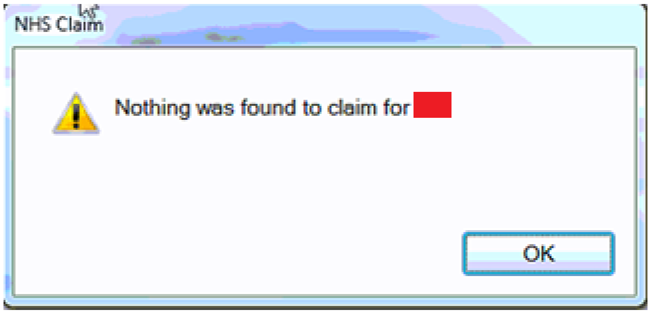
4. Click on Claim
5. Click on Multiple then select all of the providers than carry out NHS treatment at the practice then select OK.



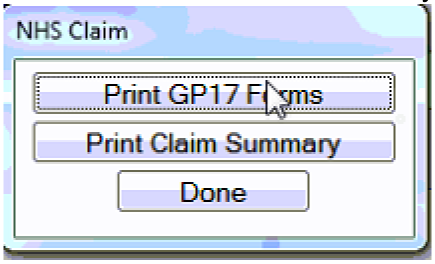
6. You will then see the screen shown below ensure that the ‘Date to’ shows today’s date and select OK.



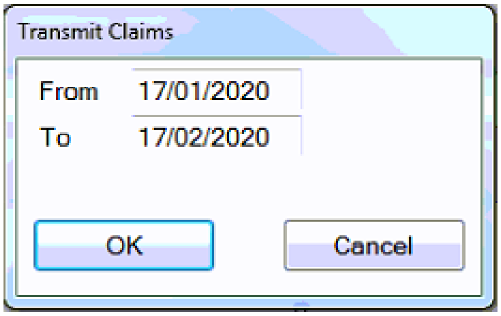
7. If the provider has completed no claims you will be shown the box below select OK.



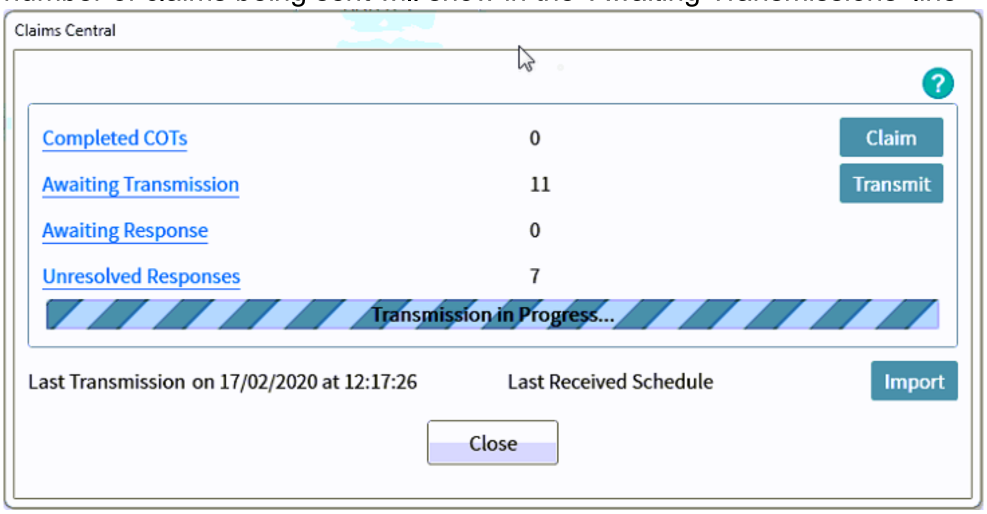
8. You should then see the screen below, if you would like to print a list of all the claims sent select ‘Print Claim Summary’ if not select ‘Done’



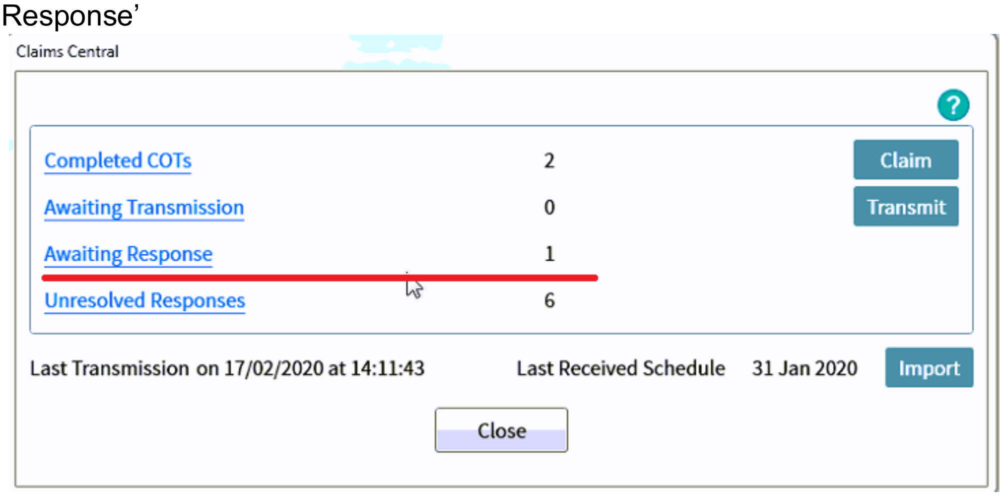
9. You will then see the screen below and it will automatically display a three month window. Do not amend these dates and select OK.



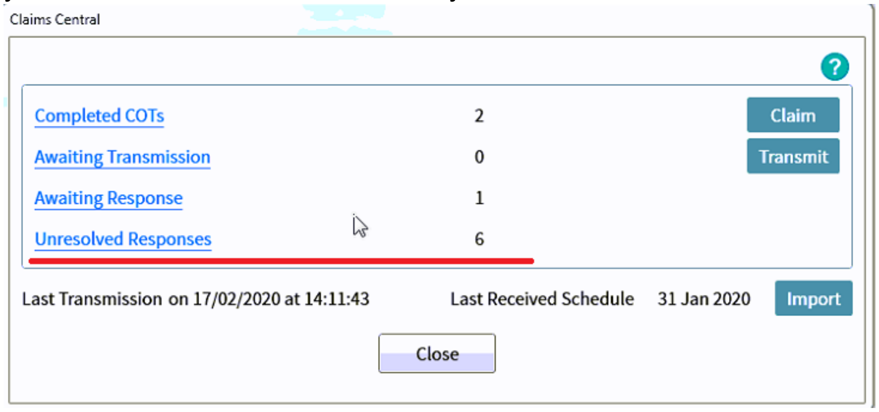
10. The screen will then show the transmission in progress bar along the bottom and the number of claims being sent will show in the 'Awaiting Transmissions' line



11. Once the transmission has completed the claims will move down into 'Awaiting Response'



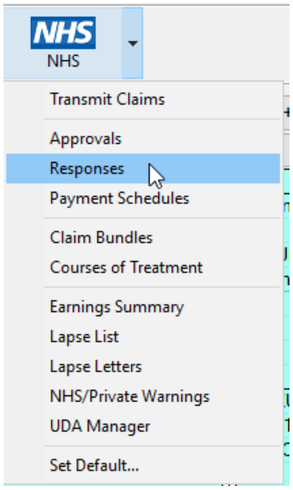
12. Once you do another transmission anything responses the board have sent regarding your claims will come back in. They will show under 'Unresolved Responses'



13. To view responses you can click on 'Unresolved Responses' on the claims central screen on select the arrow shown next to the NHS button and select 'Responses'

Viewing NHS Reponses

You can view NHS responses by clicking on 'Unresolved Responses' from the claims central screen shown in the 'How to Transmit' section. Alternatively, you can access NHS responses from the NHS button on the workspace by clicking on the drop down arrow and selected responses as shown below.



Dealing with NHS Responses

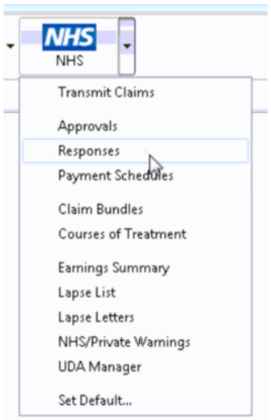
Please use the link below with a link to the most common NHS responses and how to resolve them within Exact.

https://www.soesupport.co.uk/edental/responses.html

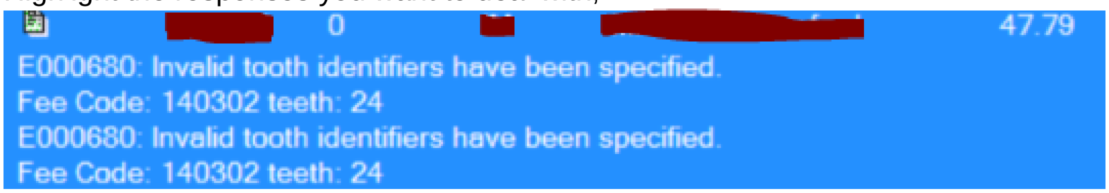
How to Resubmit Responses

1. To amend / resolve any responses you receive;

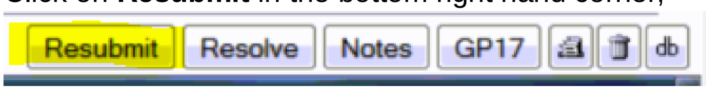
2. Click into responses under the NHS drop down.



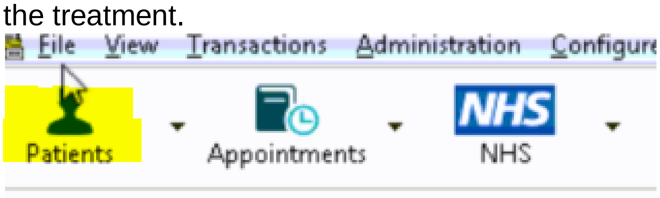
3. Highlight the responses you want to deal with;



4. Click on **Resubmit** in the bottom right hand corner;



5. Once you have resubmitted, click on to the **Patient** icon at the top of your screen and it will load the patient that you have resubmitted the treatment for and allow you to amend the treatment.



6. Before you TC the treatment back through, please check that you have **"prompt for date when charging"** checked under your **user settings;**

NHS SCHEDULES

Viewing NHS Schedules

NHS Schedules will be received once a month, and you will notice they come in when you transmit. To deal with the schedule:

1. Go to - Administration - NHS - Payment Schedules.
2. It will ask you to select dates and providers, to do the most recent for all providers, leave the screen as it is and click ok.
3. A list of schedules will appear, with dates and schedule numbers that will relate to the paper version.
4. Double click on the schedule you wish to check.
5. This screen will display differences. If its blank, there are none. If it has entries:
6. 5a. if you agree with the difference, which you can check by double clicking, click the 'adjust' button at the bottom. This will adjust the amounts on the system, and you are accepting what the board has paid you.
7. 5b. If you disagree with the difference, you cannot resend the claims through EXACT, you will need to ask the PSD for 283 adjustment forms, they can advise on how these should be done, these have to be sent by paper.
8. Once the differences have been dealt with, by adjusting it will auto tick, but if disagree you can tick the box on the far left. Once empty, the schedule has been dealt with, close the screen(small cross on the top right), and then highlight the schedule you have just done, and click 'Process Payments' on the bottom left. This will clear the open amount, and put a tick in the box on the far left. The schedule is now processed.

If a response has come back but is not part of a schedule you can resubmit and resend

Adjusting Claims – 283 Forms

If any course of treatment comes back on a schedule as showing a difference you **will not** be able to amend this by resubmitting but will need to submit a 283 form to the PSD. You can send the form from your NHS.net email address which will act as your signature to nss.psd-customer-admin@nhs.net. You can find the form by visiting the link below:

https://nhsnss.org/services/practitioner/dental/payment-claims-and-fees/adjustment-claims/

Non-Payment – 286 Forms

For payments outstanding, contact our Helpdesk on 0131 275 6300. Please have the claim details ready, but note we can only look up one non-payment, as invariably this requires more detailed investigation

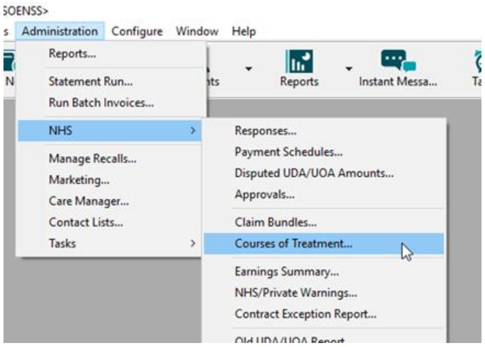
Orthodontic non-payment queries only should be requested by submitting a Dental 286 form. You can access the form using the link below:

https://nhsnss.org/services/practitioner/dental/payment-claims-and-fees/adjustment-claims/

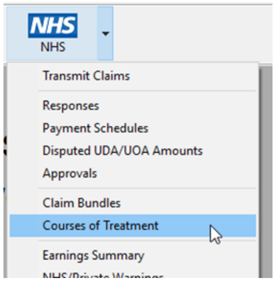
List Course of Treatment Report

In order to check if there are any Courses of Treatment that have been transmitted to the board within the scheduled cut off dates but have not come back on a schedule please use the steps below:

1. Go to Administration > NHS > Courses of treatment

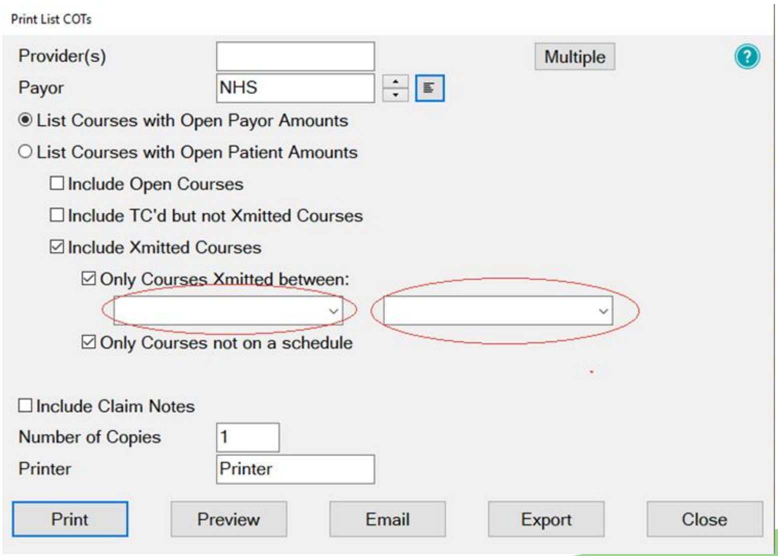


   a) If you have the NHS icon on your workspace you can click on the arrow beside NHS then select Courses of Treatment in the drop down.



2. Once the Courses of Treatment screen opens click on the  icon in the bottom right hand corner.
3. Set the report as shown below:

   In the circled fields enter to start and end date of the NHS cut off period. This will isolate the claims that should have come back on a schedule but haven't.

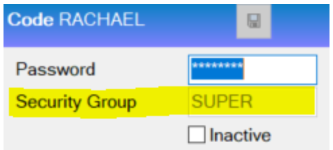


USER SETTINGS

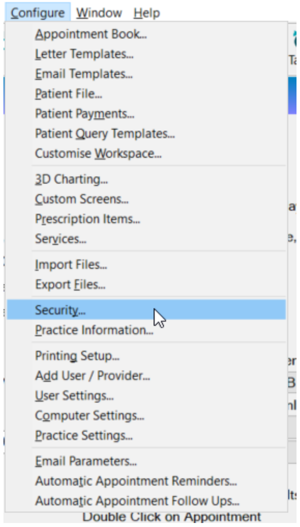
Adjusting Security

A users security defines what they have the ability to do one the system, these are divided into groups that users are a part of. If you adjust a security setting it will amend it for **all users in that group. You will need to be a super user or admin user to amend security groups**

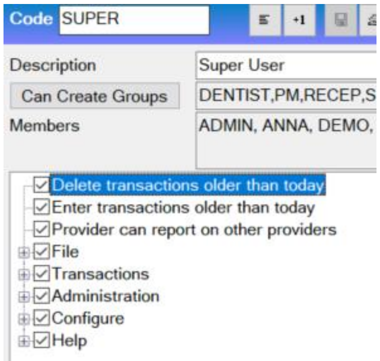
1. First to find out what security group someone is in, go into **configure > user settings**
2. Find the user you want to look at and you can then see the security settings underneath the users name and password;



3. Then go into **Configure > Security**



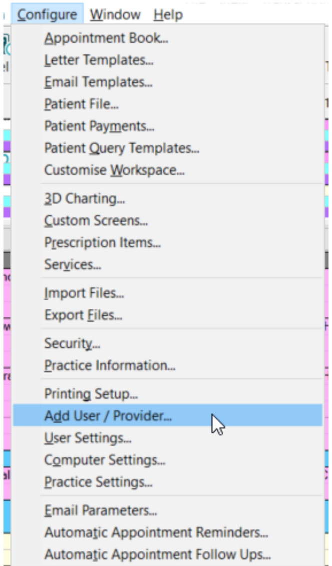
4. Using the **Code** section find the group you want to amend. Everyone listed underneath is in this security group and everything ticked it what they have the ability to do;



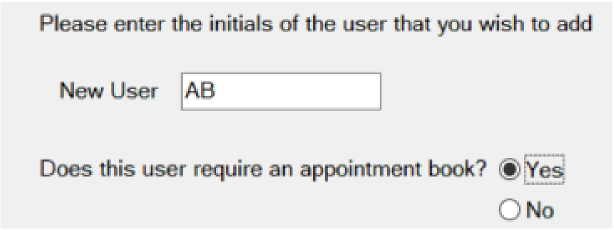
5. You can then click in these subsections and amend the security settings for that group.

Adding New Users

1. To add a new user or Provider into Exact you must first click on **configure > Add User / Provider;**

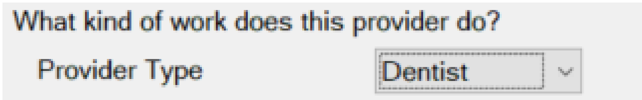


2. Then on the first window on the Add User Wizard, put in the way you want the user to appear on the appointment book and user name when logging in.
3. When selecting if they require an appointment book, if they are a provider but aren't starting yet, still click yes – this is what makes them a provider and not an admin user.

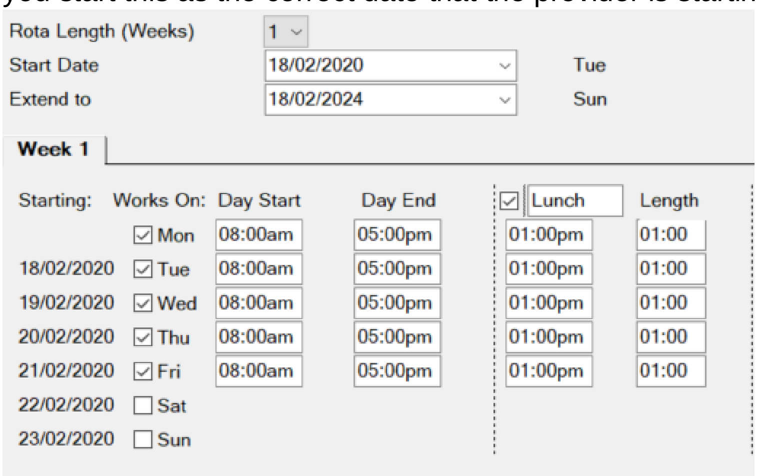


4. Click **Next >** and the next screen will want you to select the security group that the provider requires and add in a temporary password for them to just get logged in (make sure you tick **"User must change password at next login"**

5. Press **Next>** and the next page will be for any additional details you wish to add such a the providers name and qualifications. This is the section where you fill in the provider type;



6. Press **Next >** and this page you can add in the providers address / telephone numbers and an email address if they would like to receive an email every time an appointment is made with them.
7. Press **Next >** and this section is where you can pick the providers appointment book colour and text colour.
8. Press **Next >** where you will be asked to tick which recall type the provider will set, either dentist or hygienist
9. Press **Next >** and you will be prompted to add in the providers working rota, make sure you start this as the correct date that the provider is starting with you.



10. The next two pages will asked you which appointment book (if you have more than one) that you want the provider to show in and how they want their stickman (patient at the door) settings to show.
11. Press **Next >** and this is where you can add in the provider NHS details and press **Finish,** this will then add the new provider to the diary and open their rota from the dates you selected

CONTACT LISTS

Creating queries

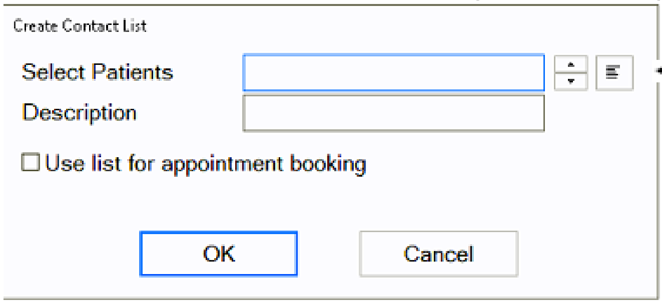
This document is to help you create some commonly used search queries in EXACT. These can be created and used from Administration > Contact Lists to enable you to contact a specific group of patients.

Method

Queries can be created from numerous places within EXACT but the preferred method is as below.

a) Go to Administration > Contact Lists.

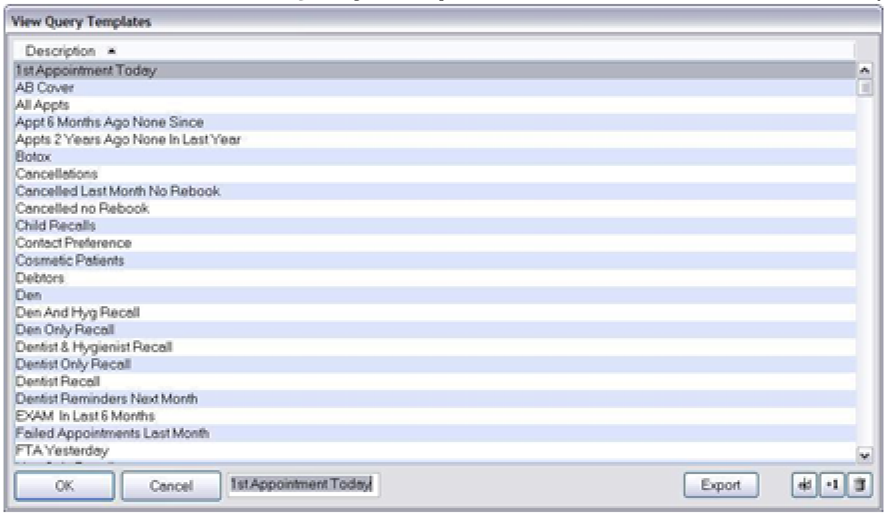
b) Click on Create List and the following screen will appear:



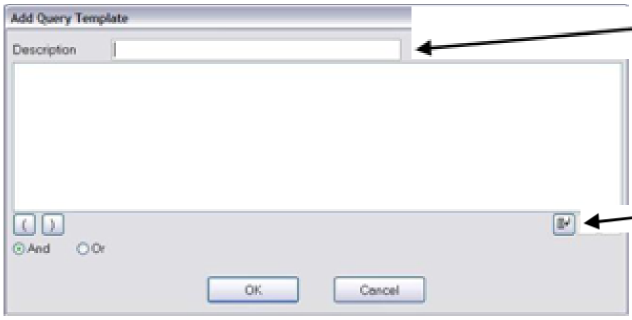
'**Select a Query Template**' list option.

c) Click in the select patients box and the lined menu button (Select a Query Template) will appear to right of that box

d) Click on the **Select a Query Template** button and this screen will appear:



e) Click on the **+1** button and the **Add Query Template** box will appear as below:



'**Description**' box

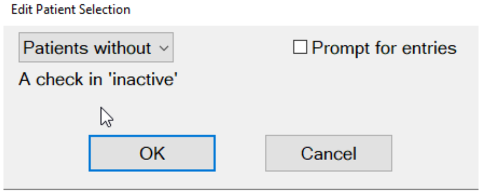
'**Insert a Patient Selection into the list**' button.

f) To start creating your new query click on to the button with the arrow pointing in (Insert a Patient Selection into the list) found under and to the right of the white area and start creating your new search queries as detailed in the options below.

Contact List Example: Searching for patients with no appointments in the last two years

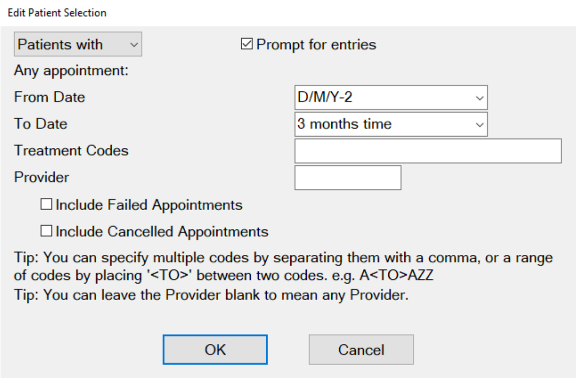
Follow the procedure above and then type in your description (e.g. Patients with no appts in last 2 years) and select the following search conditions:

a) A check in ‘inactive’, click on OK and select ‘Patients without’ from the drop down list (this means that your search will only pick up active patients). This should look like this



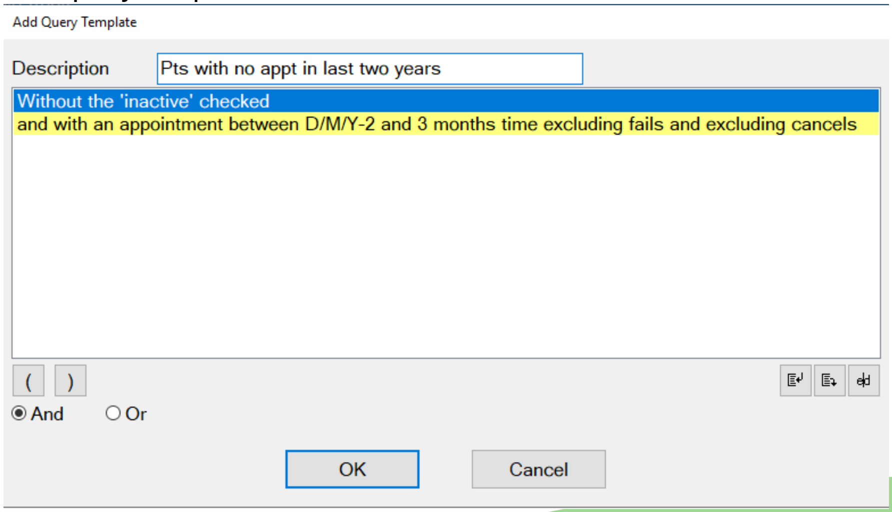
b) Click on OK

c) Any **Appointment**, click on OK and select ‘Patients without’ from the drop down list and then enter the date code of ‘D/M/Y-2’ in the **From Date** box and ‘D/M+3/Y’ in the **To Date** box (this means we are searching for patients with no appointments from 2 years ago up to 3 months into the future, this is done in case some of the patients realise they have not been in for some time and have booked an appointment). The screen should look like this:



d) Click on **OK**

e) The query template should look as below:



f) Click on ‘OK’ and the query will now be saved into your list of available search queries and can be used at any time.

To run the list click ok to all screens. Your patient search will now start to run. This may take a few minutes.

Contact List Video

Please use the link below to view how to create a contact List in Exact

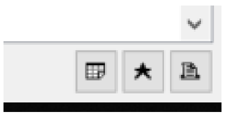
https://www.youtube.com/watch?v=Qb-44c7B5I0&t=4s

REPORTING

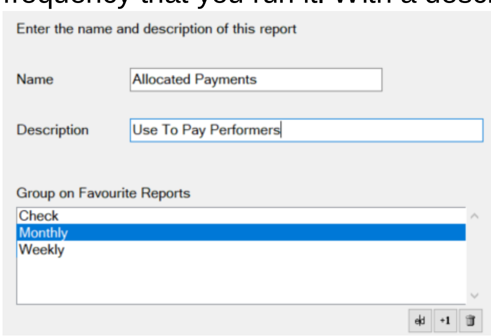
Adding Reports to Favourites

When you are in Exact Reports you have the ability to add reports that you use frequently into your favourites tab, this will be for the user that is currently logged in and each user will have to add their own favourites in.

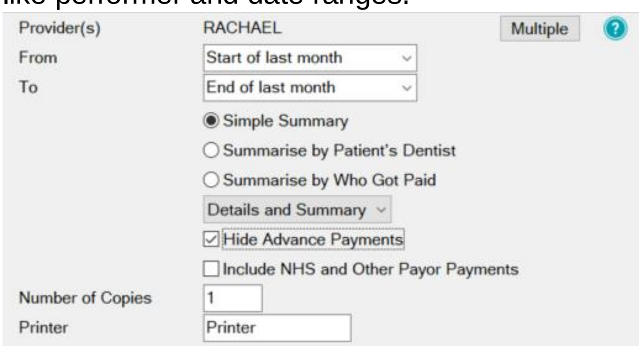
1. Go into reports and highlight the report you want to add into your favourites, and press the star icon in the bottom right hand corner;



2. You can then choose or add the group as monthly / weekly or daily, depending on the frequency that you run it. With a description if you would like.



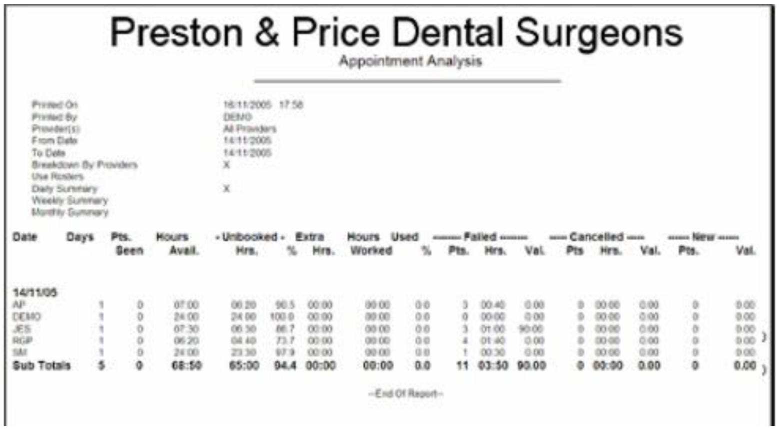
3. You will then be able to fill out the relevant fields that you use when running the report, like performer and date ranges.



4. This will then save into the favorites tab to be run easily with the prefilled dates / performers in place

Appointment Analysis Report

This report is used to print a summary of appointments, and should be run on a regular basis, usually weekly. As the information is taken from the appointment book, it is important to ensure the status of each appointment is accurate, by ensuring patients are being checked as having arrived, being moved into the chair, appointment complete, etc. This is accomplished by using the 'Arrivals Door' feature.



Preston & Price Dental Surgeons

Appointment Analysis

Printed On	16/11/2005 17:58
Printed By	DEMO
Provider(s)	All Providers
From Date	14/11/2005
To Date	14/11/2005
Breakdown By Providers	X
Use Rosters	
Daily Summary	X
Weekly Summary	
Monthly Summary	

Date	Days	Pts. Seen	Hours Avail.	Unbooked Hrs.	Unbooked %	Extra Hrs.	Hours Worked	Used %	Failed Pts.	Failed Hrs.	Failed Val.	Cancelled Pts	Cancelled Hrs.	Cancelled Val.	New Pts.	New Val.
14/11/05																
AP	1	0	07:00	06:20	90.5	00:00	00:00	0.0	3	00:40	0.00	0	00:00	0.00	0	0.00
DEMO	1	0	24:00	24:00	100.0	00:00	00:00	0.0	0	00:00	0.00	0	00:00	0.00	0	0.00
JES	1	0	07:30	06:30	86.7	00:00	00:00	0.0	3	01:00	90.00	0	00:00	0.00	0	0.00
RGP	1	0	06:20	04:40	73.7	00:00	00:00	0.0	4	01:40	0.00	0	00:00	0.00	0	0.00
SM	1	0	24:00	23:30	97.9	00:00	00:00	0.0	1	00:30	0.00	0	00:00	0.00	0	0.00
Sub Totals	**5**	**0**	**68:50**	**65:00**	**94.4**	**00:00**	**00:00**	**0.0**	**11**	**03:50**	**90.00**	**0**	**00:00**	**0.00**	**0**	**0.00**

--End Of Report--

1. Leave the **Provider(s)** field blank to summarise the Appointments for the whole practice.
   An individual provider can be selected from a list by using either the button or the button.
2. Clicking the Multiple button will allow a combination of providers to be selected.
3. The 'From' and 'To' Date fields are used to define the date range for the report.
4. Other fields / options:

Option	Field
Breakdown by Providers	This will separate the report into sections broken out by provider, with subtotals for each day.
Use Rosters	This will show any rostered time that is being used within the appointment book.
Daily, Weekly or Monthly Summary	This report can be summarised by day, week or month. Select the option required by clicking on the appropriate option.

The report includes the following:

1. Number of failed or cancelled appointments
2. Number of new patients
3. Number of patients seen
4. Estimated value of treatments. In order for the value to appear, treatment must be book from planned treatment, or the booked service must have a value associated with it (set under Configure > Services).
5. Average wait time (from the 'Arrivals door').

Open Transaction Reconciliation

The Open Transaction Reconciliation identifies money that could be paid to a provider but it is currently unallocated. The report will show all payments and receipts that have been entered into Exact that are unallocated from the beginning of use.

The debit column shows any invoice that a payment has not been allocated to. The credit column shows any payment that has not been allocated to an invoice, the amount of the payment and the amount left of that payment that can be allocated (if this is less that the total amount of the payment it means it has been partially allocated to another invoice.)

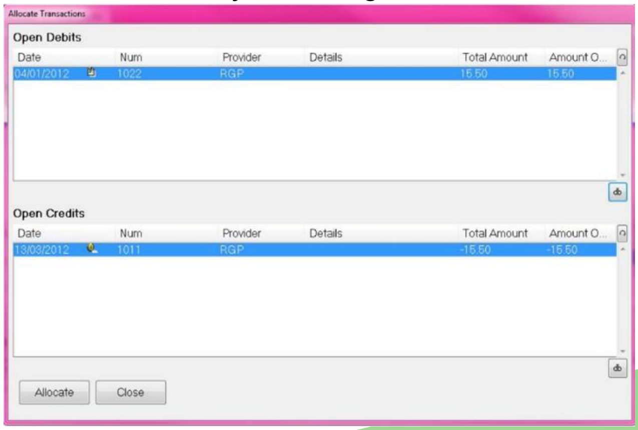
It is best to run this report before running the allocated payments report to ensure everything is allocated. When the payments are allocated together you will need to re-run the allocated payments report to view the updated totals.

Manually Adjusting Allocations

1. Go to the patients £ and find the selected invoices/payments that are allocated incorrectly.
2. Highlight one of the invoices and select the ‘i’ button on the bottom right corner of the transactions screen.

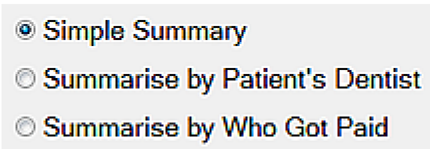
3. This will then show a screen showing what allocations are on this invoice, in this screen you highlight the allocations and click the dustbin icon in the bottom right of this screen, this will remove the allocation from that invoice.
4. Go through all of the invoices/payments that have incorrect allocations and do the same process as above for them. Then once all of the allocations are removed click on the allocate button on the transactions screen.

5. This will then give you a screen showing the invoices on the top that require an allocation and on the bottom the payments that have been made to allocate to the invoice.
6. Go through each invoice and select the payment to allocate to it and click the allocate button.
7. Continue manually allocating the invoices until they are all allocated



Allocated Payments Report

This report shows receipts (payments) allocated to invoices. Use it to show all payments that have been allocated during the specified period, summarised by Provider and Payor, in order to pay Providers for work that they have done that has been invoiced to and paid by the patient. The report summarises by Treatment Payor Type, which gives practices the choice to pay Providers at different percentage rates for treatment completed under different Payor Types. The option is also available to pay on advanced payments which are deposits. The report has a **detailed** section that shows more information per payment than is shown on the summary screen, which enables a practice to access more detail.



Simple Summary

The report will include a summary of the total allocated for each provider selected, by payor.

The summary is broken down by Provider into allocations and advances.

All payor types are listed for each Provider. For each of these payor types it shows any adjustments, payor invoices, patient invoices, and a total, for both the allocated and advance payment sections of the summary.

Summarise by Patient's Dentist

The report will include a summary of payments for work done for other Providers' patients. This may be useful if a dentist has covered for sickness or to see how many Providers are referring to a hygienist.

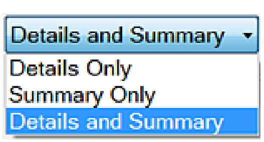
Both the detail and summary sections are the same as for the Simple Summary option above, except there is a Pats Prov. column that in each of the detail lines shows who the patients Provider was.

Summarise by Who Got Paid

This shows the allocations to Providers to whom the payments were made.

The summary section is the same as the Simple Summary option above, except that it has an extra column for Trns Provider and the report is broken down by the Provider to whom the payment for treatment was allocated, and shows under this the Providers who were actually paid for the treatment. It may include Providers who were not included in the selection criteria, if those Providers made or received allocations from one of the specified Providers.

For the report layout, specify either Details, Summary, or Details and Summary in the printout:



In this report you will need to decide if you are paying with advanced payments included (deposits are paid to the dentist) or not. If you are only paying the dentists for work completed click on ‘Hide Advanced Payments’

Option to hide advance payments:

☑ Hide Advance Payments

Option to include NHS and other Payor Payments:

☑ Include NHS and Other Payor Payments

Why is there a negative figure in the Advance Payment Column?

A patient has made a payment under Dentist A's name. Part of this payment has been allocated to an invoice that Dentist A has carried out today. The other part has been paid in Advance for treatment the patient is going to have done in the future.

In this scenario when you run the allocated payment report there will be a positive figure under the Advanced Payment Column.

The patient returns a month later for the rest of their treatment. This treatment has been carried out by Dentist B. The payment that was paid in the previous month under Dentist A has now been partly allocated to Dentist B too.

When you run the Allocated Payment Report now for Dentist A you will see that there is a negative figure under the Advanced Payment Column because this amount has been allocated to Dentist B not A.

Which total should I pay on?

You have 2 options on which total to pay your associates on and this is individual to each practice.

1. Total Column - The total column is the total number of allocations including any adjustments
2. Patient Invoice - This column ONLY shows Invoices that have been paid - for example work done. This does not include any adjustments

The resulting report shows:

1. Total Current Receipts
2. Total Receipts Allocated to Invoices (adjustments, payor invoices and patient invoices)
3. Total Unallocated Receipts (advance payments)
4. Total Extra Items sold.

Clyde Munro specify you should be paying from the total column without advanced payments.

Managing Advanced Payments

If you are collecting advanced payments you will need to have ‘prompt for payor on allocated’ set up so that the reception can select whether this is an NHS payment or any other payor. You can do this using the steps below:

Configuration option to prompt users to specify a Payor when payments are unallocated:

Configure > Patient Payments ☑ Prompt for payor on unallocated

Invoiced Work by Owning Dentist

This report calculates how much to pay providers who have worked on patients for other providers. The report displays the amount of treatment that has been invoiced, i.e. treatment that has been charged for; however the report does not show whether the treatment has actually been paid for.

To Run the 'Invoiced Work by Owning Dentist' Report

1. By using the **Select Patients** field, a query can be selected or created, making it possible to print this report for selected groups of patients as defined in the query.
2. Leaving the **Provider(s)** field empty will print an ‘Invoiced Work by Owning Dentist’ report for the entire practice; however an individual provider can be selected from the list by using the button.
3. Clicking the Multiple button will allow printing for a combination of Providers. Alternatively, you can leave the **Provider(s)** field blank and select all providers belonging to a provider Category by selecting a Category in the **Provider Category** field.
4. The ‘From’ and ‘To’ date fields are used to define the date range for the report.
5. Placing a tick in the check box next to ‘Show zero value invoices’ will include these in the report.
6. Placing a tick in the check box next to ‘Show Stock Items' will add invoices for stock items sold to patients to the report.
   The example below shows an ‘Invoiced Work by Owning Dentist’ report for the provider DEMO, with ‘Show Zero Value Invoices’ selected:

New Sites

Invoiced Work by Owning Dentist

Printed On	04/03/2020 12:59pm
Printed By	INDIA
Patients Selected	
Provider(s)	All Providers (ANNA, IAIN, INDIA, JULIE, MATTJ, NICKB, OVERFLOW, PAT, RACHAEL, RYAN, RYANB, £STOCK)
From	01/01/2019
To	04/03/2020
Show zero value invoices	X
Show stock items	
Separate Invoice Lines	X

Dentist RYAN's Private work on RYAN's patients

Patient	Invoice#	Date		Patient	Total Fee	Service Code(s)
*Banning Dental Care, UKHNB01	1879	03/06/19		0.00	0.00	
			0.00	0.00	0.00	UNAVAILABLE
			0.00	0.00	0.00	W1D1
*Banning Dental Care, UKHNB01	2026	14/06/19		0.00	0.00	
			0.00	0.00	0.00	AUTONOTE
			0.00	0.00	0.00	UNAVAILABLE
			0.00	0.00	0.00	UNAVAILABLE
			0.00	0.00	0.00	UNAVAILABLE
			0.00	0.00	0.00	W1D2
		Total		0.00	0.00	

Dentist RYANB's Private work on INDIA's patients

Patient	Invoice#	Date		Patient	Total Fee	Service Code(s)
*Ashford Periodontics, UKASN01	2686	10/09/19		0.00	0.00	
			0.00	0.00	0.00	C4NHS
*Heritage Dental Health LTD, UKHTG	2691	10/09/19		0.00	0.00	

List Outstanding Treatment Report

When to use this report:

It is recommended that this report is run at regular intervals, at least once a month or once a week, for each Provider.

Purpose:

This is used to print a report listing the patients who have:

- Unclaimed complete treatment plans (all items charged but not TC'd)
- Incomplete treatment plans (plans which are partially charged)
- Incomplete treatment plans with uncharged items (plans which have items which are ticked but not charged).
- For these three options, you can include
- All treatment plans (will show all three options above)
- Only plans with completed treatment

> ***NOTE:*** A Course of Treatment/Treatment Plan may have chart items whose planned or completed dates span a range of dates. In the case where some of the chart items have planned or completed dates ***outside*** the date range selected for the report, use the ☑ **Include all other treatment in the same COT/Treatment Plan** checkbox to specify whether those chart items will be included or not.

To run the 'Outstanding Treatment' Report

1. Select Administration > Reports > List Outstanding Treatment:
2. The Sort Patients By option allows the report to sort on a number of criteria:
3. Use the Select Patients field to select or define a query for the patients in the From and To date range.

In the case where some of the chart items have planned or completed dates *outside* this date range, use the ☑ **Include all treatment on matching COTs/Treatment Plan** checkbox to specify whether those chart items will be included in the Report or not.

For example: If you run the report for a date range over the last month with this option de-selected, it will display any COTs *with their information* from the last month only, and any COTs prior to the last month will display as headings only. However, if you select this option it will show those matching COTs prior to this last month *with their treatment item information*, and COTs within the last month also *with their treatment item information*.

TIP: A useful query to use would be for patients with no future appointments booked. That way any patient who appears on the list will either need to be invoiced for completed work or scheduled for another appointment.

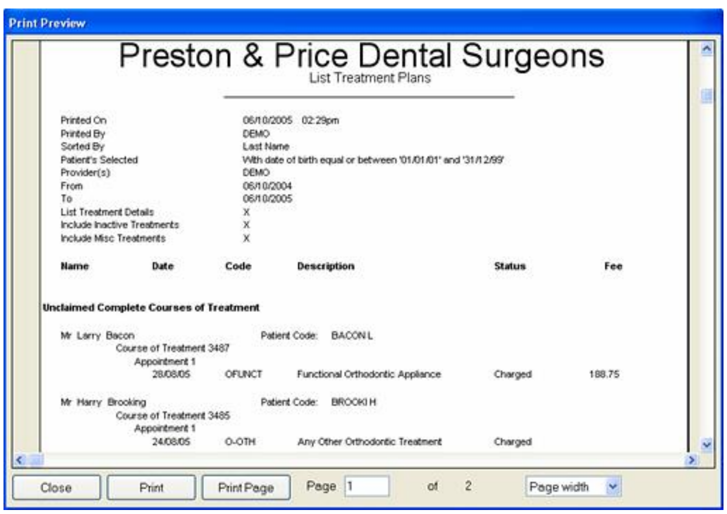
4. Optionally select a **Provider** from the list by clicking in the field and using the button. The report will then print for the selected provider only.
   Use the **Multiple** button ito select more than one provider.
5. Alternatively, you can select a **Provider Category** rather than one or more providers.
6. Use the Treatment **From** and **To** dates to specify the date range for the planned or completed treatment.
7. Other options are:

Tick	To
List Treatment Details	Include the Treatment Plan details in the report.
Include Inactive Treatments	Include any treatment that has been marked as inactive.
Include Misc Treatments	Include any miscellaneous treatment carried out.

Report Output

The example below shows an **Outstanding Treatment** report for all patients, with all checkboxes selected. Included in this report are:

- Patients who have had Treatment completed in the last 2 months that was not charged; e.g. the treatment has been saved in the **Chart** tab but the **Charge** button has not been pressed.
- Treatment that remains planned on the patients chart tab.
- Treatment details.



Ideally, the report will be run with each option selected.

For the **Treatments not completed** option, once the list has been printed, where the patient does not have any further appointments they can be contacted and if necessary the Course of Treatment closed and sent to the Payor as incomplete treatment.

For the **Treatments completed but not charged** and the **Treatments completed but not claimed (TCed)** options, there will be duplicates in the report, as TCing treatment also acts as a method of charging. If the treatment has not been TCed then it may not have been charged also.

When selecting these options it may save time when cross-referencing patients to run one of the reports, deal with the patients who appear on the list, and then run the other option separately.

Stock Sales Report

This report is used to print a list of the stock sales for a practice over a period of time. The resulting report shows the following:

- Open stock
- Number sold per item
- Stock on hand
- Unit Cost
- Total value sold.

Configuration

1. In the 'Configure' menu, click on 'Services'.
2. Double-click each service that is to be set up as a stock item, to open the 'Edit Service Item' window.
3. Make sure there is a tick in the 'List as Stock Item' checkbox: ☑ List as Stock Item
1. You can also enter the appropriate quantity in the "Number in stock" field, and in the "Full Stock Number" field.
4. Save the stock item record.

To Run the 'Stock Sales' Report

1. From the 'Administration' menu, click 'Reports' and select 'Stock Sales':
2. The 'From' and 'To' Dates can be changed to print the 'Daily Activity' report for a previous date or date range. If a date range is selected a report is printed for each day.
3. The level of detail required is selected by ticking the check boxes.

Tick	To show
Show Stock Summary	Opening and current stock.
Show All Stock Items	A list of the stock items sold.
Summary Provider Sales	Breakdown of stock sales by provider.

MANAGING LAB WORK IN EXACT

Configuring Lab Work Done/Due Reports

Setting up your lab companies

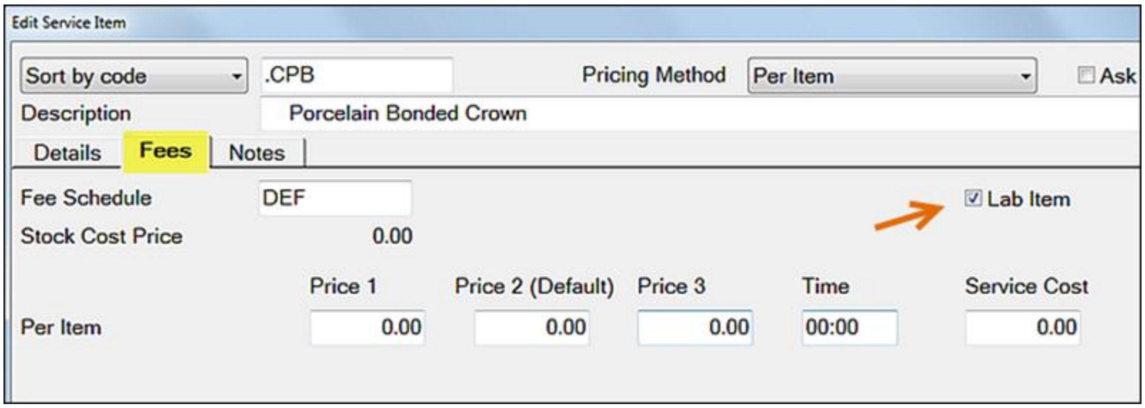
1. Go to File > Specialists

2. Click +1 located at the top of the screen - this will bring up an 'add specialist' box
3. Complete the details as specified (how much information is entered is your choice)

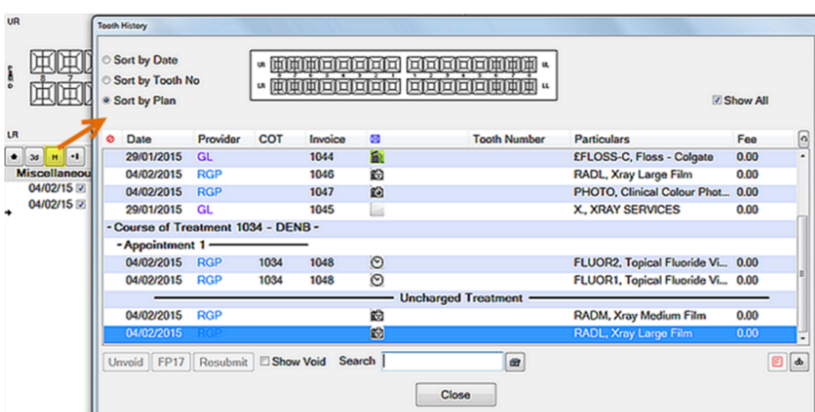
4. Tick the 'Lab' box ☑ Lab - located on the bottom right hand side of the window
5. Click OK
Repeat this for each Lab you need to add

Setting up Services as lab items

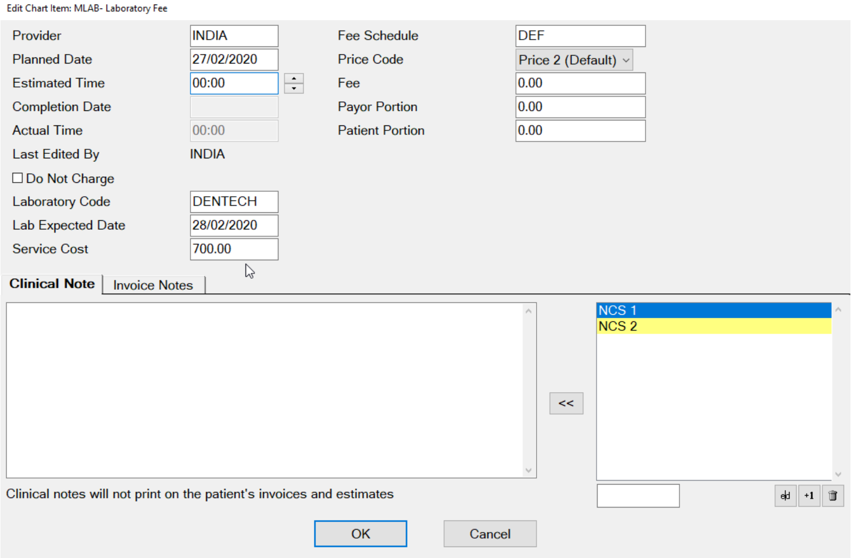
1. Select Configure > Services:
2. Double-click the service to open the Edit Service Item window.
3. Select the Fees tab and tick the box for Lab item:



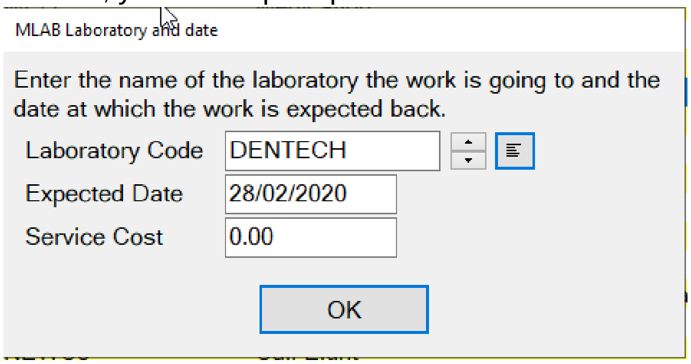
4. Click OK to close this window.
5. Set up the laboratories that are used as follows:
   a. Select File > Specialists.
   b. Click the +1 button to open the Add Specialist window:
   c. Enter a Code, and a description for the code in the First name field, then enter as much information as required.
   d. Recommended: an address, phone number and e-mail address.
   e. Be sure to check the Lab checkbox.
   f. Click OK.
   g. Repeat the above procedure until you have entered all laboratories' details.
   h. If entering the service cost once the treatment has been charged or TC'd, click the History H button within the Chart tab to view the tooth history:



6. Double-click on the service item to enter a service cost for. You will see that the service cost is the only field available for editing. Enter the cost and click ‘Close’.



7. With both the service configured and the lab details set up, the next time the service is charted, you will be prompted for a lab and due date.



8. Select the lab you wish to use by choosing a laboratory from the list or by using the button.
9. Select the date the lab work is due back and click ‘OK’.
10. When the lab item arrives, double-click on the appropriate service item and enter the cost of the lab item.

Lab Work Due Report

This report is used to print a list of patients who have pending lab work currently listed against their patient record.

For the 'Lab Work Due' report to run effectively, initially a certain amount of configuration is required to set up the laboratories that are used by the practice and set a prompt against the services that require lab work.

To Run the ‘Lab Work Due’ Report

1. Select Administration > Reports and select Lab Work Due:
2. Use the From and To date fields to define the date range for the report.

Print Preview example:

NHS England

Lab Work Due

Printed On	17-07-2018 11:12
Printed By	SOEUK
From	17-07-2010
To	17-07-2018

Date	Lab Code	Name	Phone	Patient Name	Service Code	Lab Fee
14-04-14	TEST3			Sevelda Rottooth	BNDN/PREC	0.00

--End Of Report--

Report fields include: Date, Lab Code, Name, Phone, Patient Name, Service Code, Lab Fee.

Lab Work Done Report

This report is used to print a list of patients who have lab work currently listed against their patient record (i.e., laboratory work has been done for them recently)

For the report to run effectively, initially a certain amount of configuration is required to set up the laboratories that are used by the practice and set a prompt against the services that require lab work. Once this has been done, then both lab work done and lab work due can be reported.

To 'Run the Lab Work Done' Report

1. From the 'Administration' menu, click 'Reports' and select 'Lab Work Done':
2.
3. You can report lab work done for <u>all</u> providers by leaving the **Provider(s)** field blank, otherwise enter or select a provider's name. To report on more than one provider, click the Multiple button then select the providers required.
4. Alternatively, you can select providers who belong to a particular Provider Category; leave the **Provider(s)** field blank, then enter/select a Provider Category.
5. To choose patients with a particular Payor, enter/select the appropriate Payor code.
6. The 'Summary Only' checkbox is used to limit the report to summary only: details are omitted.
7. The 'From' and 'To' date fields are used to define the date range for the report.

NHS England

Lab Work Done

Printed On	17-07-2018 10:57
Printed By	SOEUK
Provider(s)	All Providers (CONTRACT, DENTIST, DN, DO, DS, FRAN, GH, HS, HYG, IT, KA, KS, NJ, PD, PN, RJ, SA, THERAPIST, VDS, VS, ZH, £STOCK)
Payor	
Summary Only	
From	17-07-2010
To	17-07-2018

Date	Provider	Payor	Lab Code	Patient	Service	Cost
08-11-11	CONV	Private		Mr Orcslayer	Bonded Full or Jacket Crown Non-prec	0.00
08-11-11	CONV	Private		Mr Orcslayer	Bonded Full or Jacket Crown Non-prec	0.00
08-11-11	CONV	Private		Mrs Rotmouth	Bonded Full or Jacket Crown Non-prec	0.00
18-11-11	SA	NHS		Miss Sundpate	Bonded Full or Jacket Crown Non-prec	0.00
12-12-11	SA	NHS		Mrs Owlhoot	Bonded Full or Jacket Crown Non-prec	0.00
16-12-11	SA	NHS		Mrs Beasthunter	Bonded Full or Jacket Crown Non-prec	0.00
12-01-12	RJ	NHS		Mrs Brinorhin	Bonded Full or Jacket Crown Non-prec	0.00
12-01-12	RJ	NHS		Mrs Anwar	Bonded Full or Jacket Crown Non-prec	0.00

Summary

	Name	# Items	Cost
By Provider	**Name**	**# Items**	**Cost**
	CONV	3	0.00
	SA	3	0.00
	RJ	2	0.00
By Service	**Name**	**# Items**	**Cost**
	Bonded Full or Jacket Crown Non-prec	8	0.00
By Payor	**Name**	**# Items**	**Cost**
	Private	3	0.00
	NHS	5	0.00
	Total	8	0.00

--End Of Report--

MANAGING WHITE SPACE

Care Manager

Please use the link below to access a video guide for using Exact's Care Manager

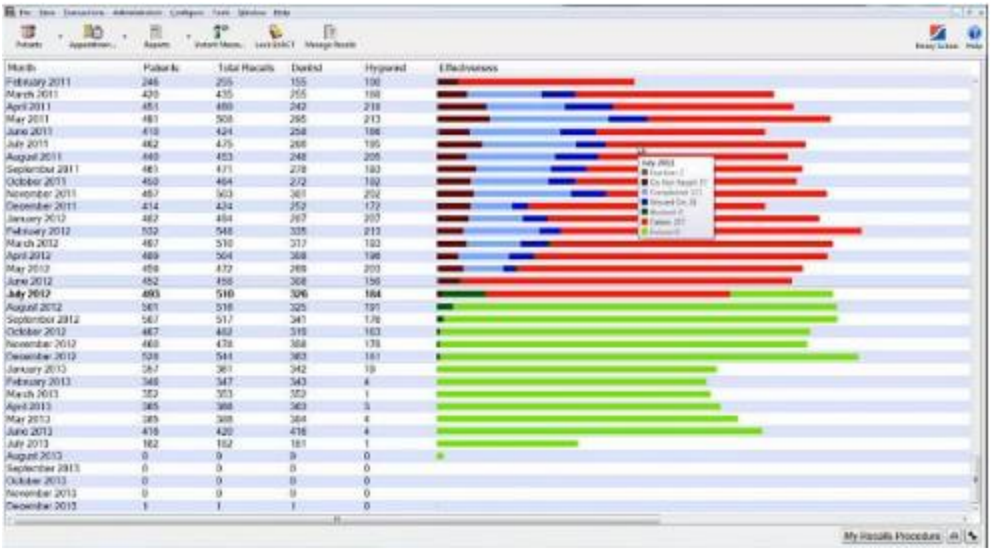
https://www.youtube.com/watch?v=uvpU10fjsdY

Recalls

Monitoring the graphic display

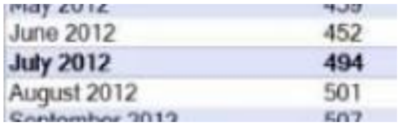
This is a Live, real time display, so if you change a recall date, the list updates immediately. You can double-click any month for a detailed Month View.

The main screen displays figures and a colour graphical display per month:



Month	Patients	Total Recalls	Dentist	Hygienist	Effectiveness
February 2011	246	255	155	100	
March 2011	420	435	255	180	
April 2011	451	460	242	218	
May 2011	481	508	295	213	
June 2011	410	424	258	186	
July 2011	462	475	268	195	
August 2011	440	453	248	205	
September 2011	461	471	278	193	
October 2011	450	464	272	192	
November 2011	497	503	301	202	
December 2011	414	424	252	172	
January 2012	482	494	287	207	
February 2012	532	548	335	213	
March 2012	497	510	317	193	
April 2012	489	504	308	196	
May 2012	459	472	269	203	
June 2012	452	456	308	156	
July 2012	**493**	**510**	**326**	**184**	
August 2012	501	516	325	191	
September 2012	507	517	341	176	
October 2012	467	482	319	163	
November 2012	460	478	308	170	
December 2012	528	544	383	161	
January 2013	357	361	342	19	
February 2013	346	347	343	4	
March 2013	352	353	352	1	
April 2013	365	368	363	5	
May 2013	385	388	384	4	
June 2013	418	420	416	4	
July 2013	182	182	181	1	
August 2013	0	0	0	0	
September 2013	0	0	0	0	
October 2013	0	0	0	0	
November 2013	0	0	0	0	
December 2013	1	1	1	0	

By default the current month is identified in bold:



June 2012	452
July 2012	**494**
August 2012	501

Detail:

Month	Patients	Total Recalls	Dentist	Hygienist	Effectiveness
August 2011	440	453	248	205	
September 2011	461	471	278	193	
October 2011	450	464	272	192	
November 2011	497	503	301	202	
December 2011	414	424	252	172	
January 2012	482	494	287	207	
February 2012	532	548	335	213	
March 2012	497	510	317	193	

For each month you can see numbers for Patients, the Total Recalls, and the Total figure split between Dentist and Hygienist.

Note that Therapist recalls could constitute part of either the Dentist or the Hygienist figures, depending how you have configured the Recall Manager.

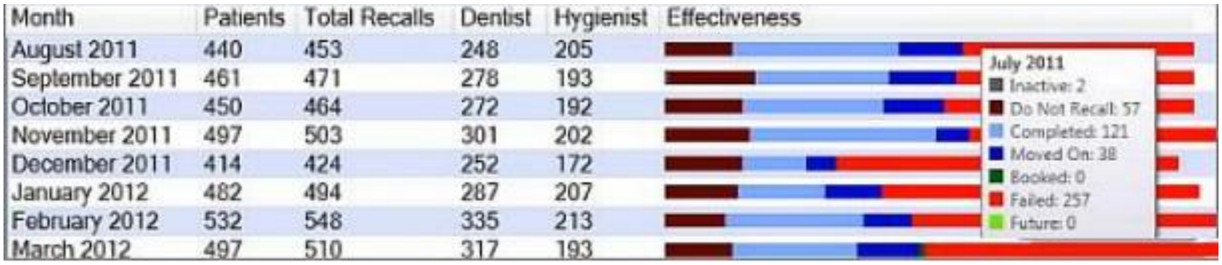
The Effectiveness graphic display has significant usage of colour, and you can mouse over any line to see a detailed tooltip breakdown of recall types. See Interpreting the Effectiveness display

Interpreting the colour display

Recall Manager provides automated, live, real time status information. The data in the graphical display is Live, so as you change recall dates in EXACT, it updates instantly, providing a visual snapshot of your recall effectiveness at any moment:

Because recalls are a critical element to the success of most dental practices, this display can be used as an instant snapshot of business health. Over time you can use it as a dynamic barometer to gauge the effectiveness of your recall policies.

For example, the predominance of red in this screen would be worrying:



Roll over any graph area for tooltip Effectiveness statistics display:

Colour		Representing	Good or bad Indicator?
	Dark green	**Booked:** Patients with recalls whose appointments have been booked.	**Committed business** - this is the best recall status. The more dark green in the display, the better.
	Light green	**Future:** Patients with recalls in the future who do not have appointments.	**Still good.** Patients remain as likely revenue for the future.
	Light blue	**Completed:** Patients who completed treatment.	Indicates **work done**.
	Dark blue	**Moved On:** Patients with appointments that have been postponed.	**Okay.** "The appointment did not happen, but we haven't lost them yet; they are still in the system."
	Grey	**Inactive:** patients who are permanently lost to the Practice.	**Lost** - there will be no further business from these patients.
	Dark red	**Do not recall:** whether due to a patient decision or a Provider decision.	**Not lost just yet.** We will not recall them, but these patients may still choose to come back for further treatment.
	Red	**Failures:** Patients who failed to be recalled, with no further planned recalls or appointment bookings.	**"The life blood of the Practice draining away".** These patients were allowed to walk away. **NOTE:** The Recall Display should not show much red. If the Practice hasn't seen patients for a few years, or if they are otherwise lost to the Practice, they should either be de-activated (grey status), or

			the Practice should have a marketing drive to bring them back; they should not be left at "red" status.

If your appointment book is showing a lot of white space it would be helpful to look at patients that have failed their recall.

NHS Lapse List

This report will produce a list of NHS patients who have a lapse date within the date range you specify.

The report will show the following information:

- Patient name
- Dentist
- Lapse Date
- Home & Work Phone
- Acceptance date of last treatment
- Date of Last Exam
- Patient Balance (if they are in debt/credit or 0 balance)

NHS Scotland

Lapse List

Printed On 27/02/2020 15:50
Printed By SOEUK
Patients Selected
Provider
From 01/01/2019
To 29/02/2020
Types
Type2

Patient	Dentist	Lapse Date	Hm ph	Wk ph	Accept. Date	Last Exam	Balance
Miss Vyne Lowbranch	CB	31/01/19	55528874	55533442	26/01/15	23/07/13	0.00
Mrs Hazelrah Shadowloop	CW	31/01/19	055539163		26/01/15	03/09/13	14.40

Total Patients Number of Lapsing Patients: 2

--End Of Report--

Short Notice List

The Short Notice List allows you to collate a list of patients who would like to be notified of sooner appointments or of any opening slots if they have had to cancel. One a space appears you will be able to hover over the gap in the appointment book and click on the puzzle piece icon to alert patients on any appointment spaces that become available.

Enabling the Short Notice List

If the short notice list is not visible on the appointment book you may need to turn this on. In order to do this you will need to be logged in as an administrator or SUPER user.

1. Go to configure > practice settings
2. Add a tick in the 'Enable Short Notice List' box located at the bottom left hand side.

Adding the Short Notice List tab

After you have ensured the Short Notice List is enabled you may need to add it to your appointment book.

1. Click on the spanner at the bottom of the provider column window
2. Put a tick in ‘Select tabs for your activity bar
3. Select ‘Next >’ twice
4. Select ‘Short Notice List’ in the ‘Available Tabs’ box then click on the >> to move it across into the ‘Selected Tabs’
5. Click on ‘Finish’

PLEASE NOTE: If you are an administrator you can add this for all users following the steps below:

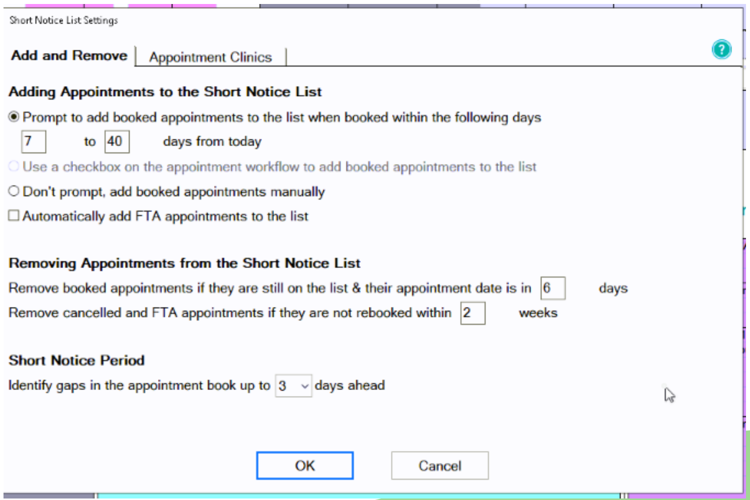
1. Click on Configure > User Settings
2. Click on the button and
3. Select the user from the list you would like to add the Short Notice List to and select OK.
4. Click on Setup next to ‘Multi ApptBook Tabs’
5. Click Next
6. Select ‘Short Notice List’ in the ‘Available Tabs’ box then click on the >> to move it across into the ‘Selected Tabs’
7. Click on ‘Finish’

Configuring the Short Notice List

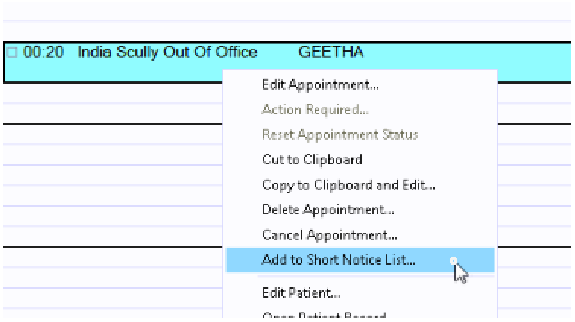
1. Go to the appointment book and go to the short notice tab, there should be a black spanner in the bottom right hand corner. You may need to be an administrator / SUPER user.

PLEASE NOTE: You can also access the Short Notice configuration by going to Configure > Practice settings and clicking on the spanner next to ‘Enable Short Notice List’.

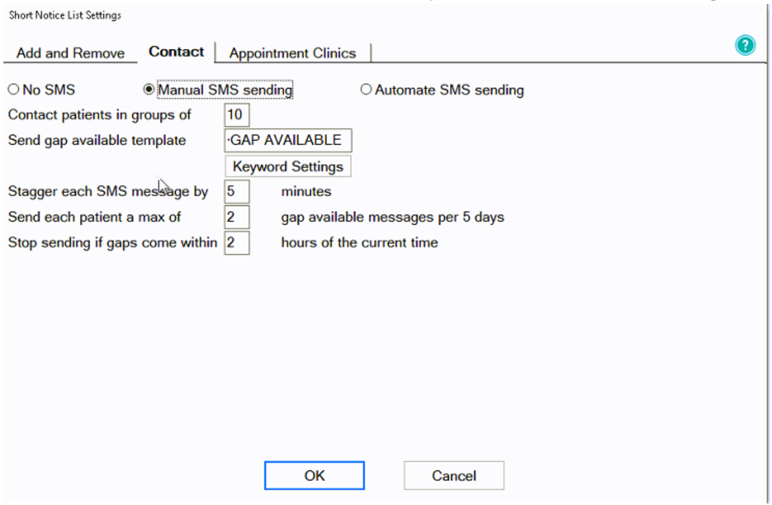
2. Opens on **'Short Notice List Settings'** window.



If you would like to be prompted to add appointments to the Short Notice List if booked within the specified date range (this is usually set to appointments between 7 to 40 days but can be amended for the practice’s needs) OR use a checkbox OR don't prompt and add manually. You can add an appointment to the short notice list when cancelling or by right clicking on the appointment and selecting ‘Add to Short Notice List’



3. You can Tick/Untick box to add FTA appointments automatically.
4. You can also decide when to remove appointments from the Short Notice List by setting a time intervals in the two removal conditions shown above.
5. You will need to specify the short notice period itself. So the length of time from today it may find an appointment for- **Maximum 5 days**
6. '**Contact'** tab is located to the top middle of the setting screen.

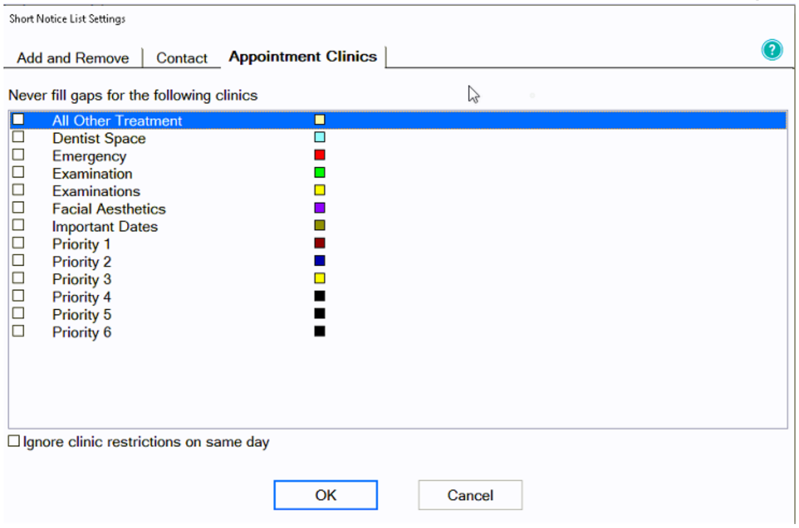


a) From this section you can decide how patients are contacted. You can select ‘No SMS’ if you would like to call your patients to advise of short notice gaps, ‘Manual SMS’ if you’d like to decide which patients you will send an SMS to or ‘Automate SMS sending’ and the system will send text messages to all who fit the criteria of the available space. .
b) Then select the size of groups to contact which will limit the amount of patients on the short notice list that you contact about the space.
c) Select the template to send to patients – the default will ask the patient to reply by text message. If you do not have SMS replies you will need to amend this message.
d) Enter the time you would like to stagger messages by in minutes – this will allow a gap between sending the text messages to allow the patient to reply should they want it before the next person is contacted.

e) To prevent patients from feeling hassled can limit the maximum amount of gap messages a patient receives within 3 days.

f) Select timeframe to stop sending SMS if gap within '*x*' hours.

7. **'Appointment clinics'** located at the top left of the setting screen.



a) Select which clinics you would like to prevent gaps being filled.

HELPFUL INFORMATION

Who should I contact for help?

General EXACT Queries

Contact the SOEUK Support Desk on 01634 266 800

NHS Queries (PIN Numbers, List Numbers, Transmissions, Regulations)

Contact Practicioner Services on 01312 756 918

Software of Excellence YouTube Channel

Please use the link below to access the software of excellence YouTube channel for helpful how to videos.

https://www.youtube.com/user/soebestpractice/videos

Accessing the portal

Please use the link below to view a video guide to accessing the Software of Excellence Customer portal

https://www.youtube.com/watch?v=J4h5gNas5Uc

Statement of Dental Remuneration

Please use the link below to access the SDR

http://www.scottishdental.org/professionals/statement-of-dental-remuneration/

NHS Discretionary fee guide

Please use the link below to access the Discretionary fee guide

https://nhsnss.org/media/3148/discretionary_fee_guide_nov_2018_final_ver2.pdf