

# EXACT RECEPTION GUIDE

Scotland

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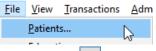


# **PATIENT INFORMATION**

# **Adding Patients**

#### From the Patients Window

1. Go to File > Patients



- 2. Click on the <sup>+1</sup> on the toolbar
- 3. Enter all of the relevant information for the patient and select OK
- 4. The patient will now show in your list.

#### From the Clipboard

- 1. From the appointment book double click on the appointment book columns.
- 2. Click on the +1 on the toolbar
- 3. Enter all of the relevant information for the patient and select
- 4. The patient will now show in your list.

# **Printing Patient Details**

You can view a video guide using the link below:

https://www.youtube.com/watch?v=-BmMKIoQiUs

# **Popup Notes**

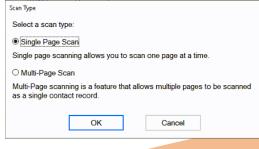
You can view a video guide using the link below:

https://www.youtube.com/watch?v=EPPNISwmh3s

# **Scanning Patient Documents**

Please use the steps below to scan any paper document into the patients file:

- 1. Click on the 'Contacts' tab of a patients file
- 2. Click on Scan in the bottom right hand corner
- 3. From the screen below select the scan type if your document is only one page select 'Single Page Scan' and if it is more than 1 select 'Multi-Page Scan'





4. From the screen below select the paper source from the drop down (this is whether you will be using your flatbed or feeder) and choose the picture type – I would advise to use Black and White as this will be a smaller file.

پ Scan using OKI-MB562-AE3C57	×
What do you want to scan?	<u> </u>
Paper source	
Flatbed ~	
Select an option below for the type of picture you want to scan.	
Color picture	
Grayscale picture	
Black and white picture or text	
Custom Settings	
You can also: Adjust the quality of the scanned picture	
Page size: Legal 8.5 x 14 inches (216 x 356 ~	Preview Scan Cancel

- 5. Click on Scan
- 6. You will see the screen below:
  - I. The **date** will automatically generate to the date you are scanning the item in. If you need to backdate this you can.
  - II. You will need to enter a description so that people can easily identify the document is.
  - III. The **creator** will automatically be set as the person who is logged in when the scanning is taking place.
  - IV. The category will automatically set as the first in your list. To change the category click on the subtron and select from your available categories.

Contact Information			
Date	19/10/2015		
Description			
Creator	CONV		
Category	SMS	÷ =	
Г	ОК	Cancel	12



# **APPOINTMENT BOOK**

# How to Print the Day List

You can view a video guide using the link below:

https://www.youtube.com/watch?v=aDc35cbizCg

# **Configuring the Appointment Book**

Amending the opening hours and Time Interval

1. On the main appointment book screen, in the bottom right hand corner there is a little black spanner icon, this is where the appointment book tabs can be configured.

and a second sec	Break 1				11:0	5005005	,
P	ayment	0	ekt	3	13	4	1000

2. Add a check in 'Make Changes to this appointment book

Make changes to this appointment book
---------------------------------------

- 3. Select Next >
- 4. On this screen below you can adjust the time interval (increments on the sides of the appointment columns) and start and end time of the practice.

Time Interval	10 Minutes ~
you have an occasio ok, the book will auto If you have one or m	ne controls how much of each day is shown. If nal appointment outside these times that is omatically adjust each day. ore late nights each week, you should set the t time that the practice is open.
Start Time	07:30am
End Time	11:59pm
Once you have made	the changes select Next > , Next > and Finish

#### Adding and Removing Tabs

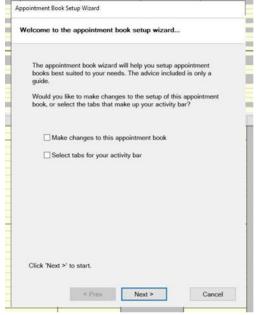
5.

6. On the main appointment book screen, in the bottom right hand corner there is a little black spanner icon, this is where the appointment book tabs can be configured.

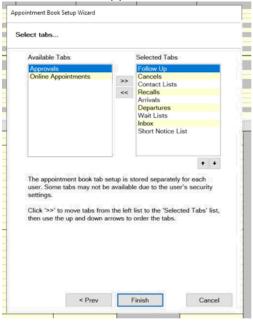




7. When you have pushed this the next window should appear with following options; (If these options are not available please login as an administrator)



8. Click on the option "select tabs for your activity bar" and press next twice and the next window should appear;





- 9. All of the available tabs should appear on this screen, the ones currently in use will appear in the right hand box. You can move the order they appear in but highlighting them and using the up and down arrows.
- 10. To add or remove a tab, highlight the option and then use the chevrons in the middle of the boxes, anything appearing in the left hand box will not show on your appointment book.
- 11. When happy with the layout, press finish. You may have to close out the appointment book and reopen for changes to appear.

#### **Adding and Removing Columns**

1. On the main appointment book screen, in the bottom right hand corner there is a little black spanner icon, this is where the appointment book tabs can be configured.

	Break 1				11:0	5005005	~
P	ayment	0	ekt	3	13	3	•

3. 4.

5.

2. Add a check in 'Make Changes to this appointment book'

Ma	ke changes t	o this appoin	tmen	t book		
Select	Next >	Next >	and	Next >	<b>`</b>	again
I.	window and cli Once they app book to can us	nn – click on th ck on the >> ear under sele e the + b	e pro to m cted o	viders init nove them columns th	ials in into ney il	en: n the 'Available Providers' the 'Selected Columns' window. I appear in the appointment order of providers in the
II.	then click on the provider will no	olumn – Click o ne b longer appear	Selec	Yes		e 'Selected Columns' window on the window below and the book.
	Appointment Book C	ove this Appointn	nent E	3ook Colum	nn?	
		Yes		No		
Once v	ou are happy v	vith your chang	es se	lect	inish	



# **Multiday Appointment Book**

#### **Opening the Multiday Appointment Book**

In order to view the multiday appointment book you will need to do one of the following:

1. Go to File > Appointments > Multiday Appointment Book...

<u>F</u> ile	View Transactions	<u>A</u> dm	inistration	<u>C</u> onfigure	<u>W</u> indow	<u>H</u> elp	
	<u>P</u> atients <u>E</u> ducation Instant Message		. Pa	tients	Repor	ts I	
	Image Storage	>	Appoi	intments			
	Payors		Hyg				
	P <u>r</u> oviders		Multic	day Appointr	ment Book		
	NHS <u>C</u> ontracts Specia <u>l</u> ists		<u>L</u> ist A <sub>l</sub>	ppointments	i		

2. Click on the arrow besides appointments and select 'Multiday' from the drop down.



3. Click on the Multiday icon on the workspace



#### **Multiday Options**

From the multiday appointment book you can view the appointments per provider over the course of five, seven, fourteen or twenty-eight days; you can do this by clicking on the respective numbers in the top right hand side of the screen



You can use the icons at the top of the daily columns to move between time periods

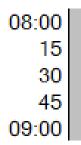
-6m -4w -1w	-1d Today	+1d +1w	+4w +6m
-------------	-----------	---------	---------

If you wish to jump to a particular date please use the date field at the top left of the columns.

Wed 25/03/20 £STOCK							
•	March 2020						
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Ν
24	25	26	27	28	29	1	_
2	3	4	5	6	7	8	
9	10	11	12	13	14	15	
16	17	18	19	20	21	22	
23	24	25	26	27	28	29	
30	31						



#### Amending the intervals and opening times



To adjust the time interval on the multiday appointment book as please follow the steps below:

1. Go to File > Providers

	<u>F</u> ile	<u>V</u> iew	<u>T</u> ransactions	<u>A</u> dn	nini			
		<u>P</u> atient	ts					
		<u>E</u> ducat	ion					
		<u>I</u> nstant	Message					
		<u>l</u> mage	Storage	>				
		<u>A</u> ppoir	ntments	>				
		Payors						
		P <u>r</u> ovide	ers					
		NHS C	ontracts	43				
2.	Click	on the	■ button besi	de the	e code box			
	Cod	e ~						
3.	Choos	se the p	rovider you wou	uld lik	e to change th	e time	e interval fo	or then select Οκ
4.		onto the			tab			
5.			een you can ad intment Length			d time	e of the mu	ltiday appointment book
	Sin	gle C	olumn and	Mu	Itiday Boo	ok		
	Α	ppoint	ment Book	Star	t Time			07:30am
	Α	ppoint	ment Book	End	Time			06:00pm
	Α	ppoint	ment Lengt	h				00:15
6	Once	vou hav	ve made vour cl	nande	es click on the		button on t	he toolbar

- 6. Once you have made your changes click on the button on the toolbar.
  7. To view the changes you will need to close the Multiday Appointment book and re-open it.



# **APPOINTMENTS**

# **Booking Appointments**

- 1. From the appointment book double click on the <sup>1</sup>/<sub>1</sub> at the bottom left hand side of the appointment book columns.
- 2. Select from the drop down list which filter you would like to use to find the patient. For this example I have used the last name field.

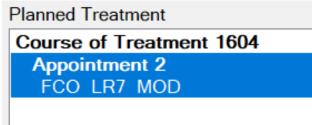
Last Name	~
Code	
Last Name	
Home Phone	63
Mobile Phone	
Alt. Reference	
DOB	
First Name	
Post Code	
NHS Number	
Also Known as	

- 3. Type in the patients last name into the field then click on the button
- Choose the correct patient from the list and select
- 5. Fill out the information shown below excluding the time field.

Service		~
Category		
Provider	£STOCK	
Time		
Length	00:00	N
	□ 1st Visit	2
Payor		

If you are booking an appointment for treatment that is already planned you can double click on in from the planned treatment window

OK





Once you have done this the information from the planned treatment will fill out the fields

Service	FCO LR7 ~
Category	All Other Treatr
Provider	£STOCK
Time	
Length	00:30
	□ 1st Visit
Payor	
Select	Copy to Clipboard

7. The appointment will now show on the clipboard on your appointment book and you can do two things:

▲ ۹ 🛱 00:30 Mr Notes \*Notes

- I. Use the appointment search tool to find an available appointment space
- II. Drag and drop the appointment into white space in the appointment book.

# **Adding Family Members and Appointments**

You can view a video guide using the link below:

6.

https://www.youtube.com/watch?v=2xec7ihLsaY

# **Using the Appointment Search Tool**

You can view a video guide using the link below:

https://www.youtube.com/watch?v=y2QITGmWTb8

# **Printing a Patients Appointment Card**

You can view a video guide using the link below:

https://www.youtube.com/watch?v=mphl6ubJBOs

# **Cancelling Appointments**

#### From the Appointment Book

To cancel a patients appointment from the appointment book please follow the steps below:

1. Right click on the appointment and select 'Cancel Appointment...'



	00:30 Mr Notes *Notes Hr	m 01580 123456 FCO LR7 INDI.	
		Edit Appointment	
	Day End	Action Required	
		Reset Appointment Status	
		Mark as Arrived	
		Cut to Clipboard	
		Copy to Clipboard and Edit	
		Delete Appointment	
		Cancel Appointment	
2.	l .	n Reason' field then click on th Notes Wed 25/03/2020 04:00pm INDIA	
	Cancellation Reason	pintment	
3. 4. 5.	Enter any notes that you	on from the list then select require boose between five options:	ОК
	Cancel Appointment: Notes *Notes Wed 25/03/2020	•	
	Notes about this appointment	ancelled	
	5 Year H	listory: 1 Cancelled & 0 FTA Appts	
	Cancel the appointment and add it to	the:	
	Clipboard Short Notice Lis	t Cancels List or Do Not Rebook	
	Don't Ca	ncel Appointment	

- I. **Clipboard** this will put the appointment on the clipboard. This is useful for when an appointment is being rearranged at the point of cancellation.
- II. Short Notice List this will place the patients' appointment on the short notice list and allow you to contact them when an appointment space that fits the criteria of their appointment becomes available. This is useful if the patient is unsure when they can rebook or your books are full until a considerable amount of time in the future.
- III. Cancel's List this will place the patients' appointment on the cancels list. This can be useful if the patient doesn't know when they want to rebook as when they is space in the diary you can work through these patients to hopefully fill out your appointment book.
- IV. Do Not Rebook this will remove the patients' appointment from the diary without prompting you to do anything else. This is useful if the patient will not be coming to the practice again.



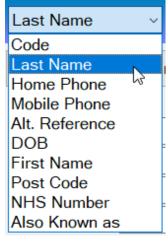
- V. Do Not Cancel Appointment this will leave the appointment in the diary.
- 6. Once you cancel the appointment in will no longer show in the appointment book on that date/time but you will see a line on the 'This patient's appointments' which shows the details of the appointment with the cancellation status.

#### This patient's appointments

ÅR.Å	Date	Time	Length	Status
	Wed 16/01/19	11:00am	00:30	N.
	Wed 19/02/20	09:15am	00:30	O Con
1	Mon 23/03/20	03:00pm	00:30	<sup>®</sup> 283
, i	<sup>°</sup> Tue 24/03/20	09:30am	00:30	0
	Wed 25/03/20	04:00pm	00:30	Ø We

#### From the 'This patient's appointments' Window

- 1. From the appointment book double click on the appointment book columns.
- 2. Select from the drop down list which filter you would like to use to find the patient. For this example I have used the last name field.



- 3. Type in the patients last name into the field then click on the button
- 4. Choose the correct patient from the list and select OK
- 5. Click on the appointment you wish to cancel so that it is highlighted. Wed 25/03/20 04:00pm 00:30
- 6. Click on the Obutton
- 7. Select the correct option (please see the section above for descriptions of each option)

#### Please note: you cannot ad an appointment to the clipboard when cancelling this way.



# **Reception Workflow**

#### To Arrive Patients (Paper)

- 1. As a patient arrives in the practice, click on the small box next to their name to check them in on the appointment book screen as normal.
- 2. An Arrival screen will appear, allowing you to select which patient information you want updated/printed.
- 3. Click the button at bottom centre to register the patient as arrived in the normal manner (see also the Arrive button in the screenshot below)

#### To use Clinipad with Patient arrival (summary of procedure)

Set Mr Geoff	Cooper as Arrived
Mr Geoff Cooper	ெெெெ
Patient Details Patient details do not need to be checked. Medical History Send a Medical History form to Clinipad Medical History is up to date. Last entry on 21/04/20	Matches the vertical ordering of forms below. Hover your cursor for a description.
FP17PR Send an FP17PR to Clinipad	Check (tick) Forms for sending to Clinipad
FP17 required as the patient is probably starting an	NHS course today.
Oral Health Survey	Simply click to print the form
Complete forms using MiniPad  Complete forms using Arrive & Send to Clinipad  Arrive & Send to Clinipad	st signed on 21/04/2015. ct a Clinipad device from the dropdown menu Arrive Cancel
ancels  Contact Lists Arrivals Short Notice List  Cl Mr Wolverine Fullbellow	inipad Follow Up Recalls Departures
□ a fun wowenne Fullbeidw □ Pad with □ a □ a □ a □ a □ b □ b □ b □ b □ b □ b	
Image:	✓ Check & Dismiss Sub Issue
	30

- 1. Check (tick) to specify which forms to send to Clinipad.
- 2. Select a Clinipad hardware device to issue to the patient.
- 3. Select Arrive and Send to Clinipad so that EXACT can prepare the Clinipad.
- 4. Issue the patient with the Clinipad and offer brief instructions.



5. When the patient returns it, click the

button

If you need the patient to use it again, click the subscripts button and hand the Clinipad back.

Once you have returned the Clinipad the patient will now show in the chair for the dentist and the patient can go to into the surgery.

#### **Patient Departure**



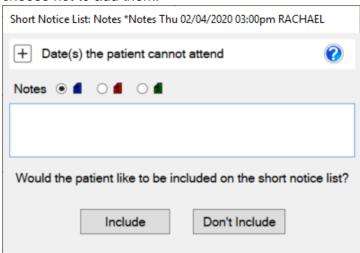
The To Depart bar will allow the receptionist to carry out the tasks needed before the patient leaves the surgery e.g. pay, rebook or collect any additional information.

The receptionist will need to click on each of the items in the list and carry out the task.

#### Short Notice List Adding a Patient to the Short Notice List

When you create a patients appointment in the next 7 to 40 days, you have the option of adding that patient to a **Short Notice List**, which appears on you appointment book tabs. To add a patient, simply make their appointment as normal, and follow the steps below:

1. When booking a box like below will appear; You can add the patient on with no notes, or choose not to add them.



If the patient wants to be on this list you set the dates/times they cannot attend. To do
this click on the + by Date(s) the patient cannot attend



2. Then click on the 💷 button

Short Notice List: Notes *Notes Thu 02/04/2020 03:00pm R	ACHAEL
Date(s) the patient cannot attend	0
	+1
Notes 🖲 🔳 🔿 📕 🔿 📕	$\mathbf{T}$
Would the patient like to be included on the shor	t notice list?
	. Houde list?
Include Don't Include	

3. Once you press the 🗐 you will see the screen below which will allow you to select the dates/times then select OK.

O Single date	25 Mar 202	0 25 f	rom	÷	to	¢ 🕐
⊖ Date range	25 Mar 202	0 25 f	or	1 🛓 days		
Same day(s)	each week					
Mondays	from	10:00 AM 🗘	to	12:00 PM 🗘	]	
Tuesdays	from	Å.	to	÷		
U Wednesd	ays from	Å V	to	÷		
Thursday	s from	Å	to	÷		
🗌 Fridays	from	Å.	to	÷		
Saturday:	s from	Å V	to	÷		
Sundays	from	Å V	to	÷		
		qK	_	Cancel		

4. Once you have set the dates you should see the screen below



Short Notice List: Notes *Notes Thu 09/04/2020	02:30pm RACHAEL				
Date(s) the patient cannot attend					
Every Monday 10:00 - 12:00 Every Tuesday 08:00 - 17:00 Every Thursday 08:00 - 12:00					
Notes 🖲 🛋 🔿 🛋	+1				
Would the patient like to be included on	the short notice list?				
Once you are happy with the ave show as available on the Short I	allability click on	lude and he pa	itient will no	wc	
	celist⊀				
Patient	Appointment		Length	fi	Provide
Mr Notes *Notes	D 09/04/2020 02:30pm		00:30	11	RACHA
		Suited Gaps for Mr Notes * Thu 26/03/2020 - 12:30pr Don't Contact for 1 day			

#### **Contacting a Short Notice patient**

When you have white space in the appointment book please use the short notice list steps below;

1. Hover over the space in the appointment book and you will see the screen below if there is no suitable patients.

	AD	MD	DU	
			***	
SMS P	atients to Fill Gap: Thu 03:	00pm for 06:00 - BC	6	
having S	ble patients can be found to SMS contact details or patien the Short Notice List button to	ts reaching their maximum	contact limit. Please	
	Sh	ort Notice List		
		2	0	

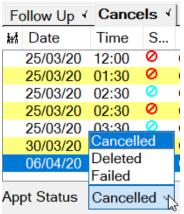


2. If you have patients that fit the criteria then you will be able to select send SMS and it will contact the patients that fit the appointment criteria on the Short Notice List.

# **Cancels List**

#### Using the Cancels list

- 1. Click on the **Cancels**  $\checkmark$  tab on the appointment book
- 2. Set the 'Appt Status' in the bottom left to the type of appointments you are looking for



3. If you have contacted a patient from this list and would like to reschedule their appointment you can drag and drop them into the appointment book, alternatively, you can drag them to the clipboard and use the search tool.

#### Removing appointments in a date range from the list

- 1. Click onto the Cancels 4 tab
- 2. Click on No Rebook
- 3. Select 'Remove a range of cancelled appointments' and set the date range you wish to remove the appointments in the list between.

Appointment Status			
Remove this appointr recorded in the patier		ancel list? (It will still be	
$\odot$ Remove the sele	cted appointme	nt only	
Remove a range	of cancelled ap	pointments	
From Date	3 months ago	~	
To Date	Today	~ 🖽	
(	ж 🖒	Cancel	
Select OK			



5. A loading screen will appear whilst Exact removed the appointments

Removing cancelled appointments	
Cancel	
terra and the second	

6. The appointments within the date range will be removed from the cancels List.

# **PATIENT TRANSACTIONS**

#### **Taking Payments**

In order to take a payment in Exact please follow the steps below:

1. Go to the patient record and click on the *f* or from the 'To Depart' bar click on 'Take Payment' as shown below

To Depart	
Notes *Notes	<b>X</b>
Collect Contact	Consent
Take payment:	£100.00

- 2. The amount this patient owns will automatically be entered into the 'Payment Amount ' box if the amount needs to be different you will need to manually adjust this.
- 3. Select a payment method and then select 'Process'

Code v N	OTES N	tis 1	Paid By	Mr Notes "Notes
Date	07/10/2019		Туре	
Provider	INDIA			
Family Members	2			
Stock Items			<b>I1</b> <<	.BMF Maryland Bridge
Discount Amount	0.00	Discount Reason		
Current Owing	100.00			
Add Planned:	0.00			
Payment Dee	100.00	Edit Allocations		
Payment Amount	100.00	\		
Payment Method	Cash ~	comment		
-		Process	Close	
		22		EXACT 13

4. You will then be prompted to print a receipt by the window shown below, please note that once you chose a receipt type (NHS or Private) this will be the only one available.

Pri	int Receipt
Print	NHS Receip
Prin	t Statement
D	on't Print

#### **Transferring Payments**

When family members attend the practice they may not pay for their treatment separately and instead opt to make the payment from one card such as when parents attend with their children. Instead of taking multiple payments you can add the full amount to one patient file then send part of the amount to other patients.

In order to transfer money between patients please follow the steps below:

- 1. Go to the patients records and click on the
- 2. Take the payment for the full amount of everyone's treatment
- 3. Click on 'Transfer'

										Statement Ar	ccount			
Date	Ð	=	a <u>e</u>	Num	COT	Provider	Particulars	Fee	Debit	Credit		(	Open A	Amt
07/10/2019	b		a	2905	1414		Invoice		100.00					
07/10/2019	<u>د</u>			1009		INDIA	Cash			200.00			-34	4.00
Key Non	Accoun	t Item	is 🗆 R	esubmis	sions					C	OT View	Details	1 1	a t
Key Non	Account		ns ⊡ R	esubmis	sions					1.00	OT View		1	at
and the second sec	-34	00	ns ⊡ R Total I		sions	-100.00	Stop Credit Alert			Cotes Notes		-100.00	1 1	a :
Current: 0+ Days:	-34. 0.	00		Due:	sions	- <b>100.00</b> 0.00			Mrs N	otes Notes			1	a i
Current:	-34. 0.	00 100 100	Total (	Due:	sions	100000000000000000000000000000000000000		Statement Run	Mrs N	otes Notes		-100.00	1	a t

4. Enter the amount you would like to transfer to the patient then click into the field next to 'Patient' and click on to get a list of all the patients at the practice

lease select	the transaction(s) to transfe	r.	
Date	Provider	Num	Amount Open
07/10/2019	INDIA	1009	34.00
Amount Fransfer to	34.00           Patient ~	÷ E	Select <u>A</u> ll
	< Prev	Finish	Cancel



- 5. The easiest way to search for a patient is to click on 'Last Name' at the top of the window so that all family members appear closer together. Choose the patient you would like to transfer the amount to and then click OK.
- 6. Once you have filled out all the items on the screen select 'Finish'
- 7. You will then see a line showing the transfer amount as a debit on the patient file as show below

										Stateme	ent Account			
Date	Ð	=	ъ	Num	COT	Provider	Particulars	Fee	Debit	Credi	it	(	Open	Amt
07/10/2019	-		8	2905	1414	INDIA	Invoice		100.00	1				
7/10/2019	0			1009		INDIA	Cash			200.0	0			
7/10/2019	40.			1009		INDIA	Transfer to Mrs		34.00					
			ns 🗆		ssions						COT View	Dgtails	i	a
		nt Iter ).00	ns 🗆		ssions				177815	lates Na			i	R
arrent:	C	0.00			ssions	-66.0	00 🗆 Stop Credit Alert	)	And in case of the local division of the loc	lotes Not Notella N	tes	Dgtails -66.00 -34.00	i	R
Key Nor Current: 0+ Days: 0+ Days:	0	0.00	Tota	Resubm	ssions	- <b>66.</b> (		tatement Run	Mrs	shad you and a feature	tes	-66.00	1	A
ourrent: 0+ Days: 0+ Days:	0	0.00	Tota	Resubm	ssions	12000			Mrs	shad you and a feature	tes	-66.00	i	A
Current: 0+ Days:	0	0.00 1.00 1.00	Tota	Resubm	ssions	12000	00 Don't Include in S		Mrs	shad you and a feature	tes	-66.00	i	R

8. If you would like to see the full patient name that the transfer was made to click on and you will see the screen below with the recipient's name in the comments.

Show Allocations	Transfer 1009					
Trans. D	Туре	Num	Comment	Provider	Alloc. Date	Amount
07/10/2019	Receipt	1009		INDIA	07/10/2019	-34.00
↓ Total allocati		-34.00				D
	ons.					Details i
Total Open:		0.00				
Total Amoun	t:	34.00				
Name		Mr Notes Notes	eld			
		Mrs Notella Not	tes			

9. Please note that when you transfer the recipient's name will appear when a statement is printed.



#### **Refunding a Patient**

1. The Refunds button is along the row of buttons along the bottom. Simply press this button and you will be presented with this screen:

○ Credit note		
Issue a credit note to future work.	the patient to use ag	ainst existing or
O Refund unused deposi	it (Max 200.00)	
Return money to the p paid in advance for tre		
O Refund money paid for	r work done	
Return money to the p The patient's balance will be discounted by t	will not be changed,	as the treatment
O Correct a receipt		
Fix up a receipt where The patient's balance the correction.		
Click 'Next >' to start.		

There are three different types of refunds which are:

- I. **Credit Note**: You will use this option to give the patient a discount against work that they have received, or to enter a credit note so they don't have to pay for future work. No money changes hands as a result of this option, and the patients balance will change so that they owe less money.
- II. **Refund unused deposit**: You will use this option to refund the patient money where they have overpaid, or have paid for treatment that they now decide not to continue with. The patient will receive money as a result of this, and their credit balance will be reduced.
- III. **Refund money paid for work done**: You will use this option to refund the patient money where they have had treatment provided and are being reimbursed. The patient will receive money, but their balance will not be changed as the invoiced amount will be adjusted to compensate.
- 2. Select the Refund option, enter in the refund amount and the reason. Then press Next.
- 3. Follow the steps in the wizard to the end then select Finish.

#### **Printing a Receipt**

In order to print a receipt in Exact please follow the steps below:

1. Go to the patients records and click on the



£

2. Click on the payment then click on the print icon in the bottom right

unsactions Dr Notes "Notes

										Stateme	nt Account	B
Date	Ð	22	a e	Num	COT	Provider	Particulars	Fee	Debit	Credi	1	Open Amt
7/10/2019	Ð			2905	1414	INDIA	Invoice		100.00			
07/10/2019	¥.			1008		INDIA	Cash			100.0	)::	
Key 🗆 Nor	n Accour	nt Item	s 🗆 R	esubmiss	ions						COT VA	ew Dgtails 1(A)
Key Nor		nt Item	s⊡R	esubmiss	ions							ew Dgtails 1
	0	.00	s 🗆 R		ions	0.	00 □ Stop Credit Ak	ert		none Tu		ew Dgtails 1
urrent:	0	.00 .00 1	otal (	Due:	ions		00 □Stop Credit Ale 00 □Don't Include i			(hue Till		ow Details i
urrent: 0+ Days:	0	.00	otal (	Due:	ions			n Statement R	un	ting Th		ow Dgtails i
urrent: 0+ Days: 0+ Days:	0	.00 .00 1 .00 p	otal (	Due:	ions		00 Don't Include i	n Statement R	un Hs	ily Total:		ow Details i (a)

3. If you have not printed a receipt before you will see the box below, please note that once you have chosen a receipt type it cannot be changed

ease select the type of	receipt you want to print
Standard Receipt	
O NHS Receipt	

4. You can then choose whether you would like to print or email the receipt to the patient

Number of Copies	1		
Printer	Printer		
Print	Preview	Email	Close

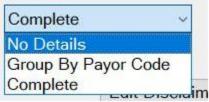
#### **Printing an Invoice**

In order to print an invoice in Exact please follow the steps below:

- 1. Go to the patients records and click on the  $\pounds$
- 2. Click on the invoice line then click on the print icon in the bottom right Transactions: Mr Notes "Notes

	6									Statem	ent Account	
Date	B	5 A	💁 Nu	m COT	Provider	Particula	rs	Fee	Debit	Cred	t	Open Amt
07/10/2019	8		290	05 1414	INDIA	Invoice			100.00			
07/10/2019	0		100	)8	INDIA	Cash				100.0	0	
Key 🗆 Non	Account	tems	Resub	omissions							COT View	w Details i 🗈
Current:	0.0	D							-	_		
Jurient.												
	0.0	0 Tot	al Due:		0.	.00 Stop	Credit Alert		W. 0	toms The	ites	0:00
30+ Days: 30+ Days:	0.0 0.0				0.00		Credit Alert Include in St	atement Run		lanes (W	iles:	0(00
30+ Days:		0 Pay	al Due: or Due:		0.00	.00 Don't			1	iones (N	HES	0:00
30+ Days: 50+ Days:	0.0	0 Pay			0.00	.00 Don't	Include in St			y Total:		0.00
30+ Days: 50+ Days: 90+ Days:	0.0 0.0	0 Pay	or Due:	fund Adjust	0	.00 Don't	Include in St atement Agir		Family	y Total:	}esubmit	

3. You can then use the drop down to choose the level of detail in the invoice



- I. No details Will only show 'For Professional Services' as the items done
- II. Group by Payor Code Will order the services by the NHS code
- III. Complete Will give the dates completed and service description
- 4. If you would like to remove the breakdown of the total by service item click on 'Remove Amounts'

Remove Amounts

5. Once you are ready you can print, email or select easy post (if you are using it) to send the invoice to the patient.

Invoice Details	Complete	~		0
	Remove	Amounts		
		Edit Disclaimer		G
Number of Copies	1			
Printer	Printer			
Print	Preview	Email	EasyPost	Close

#### **Printing a Statement**

In order to print a statement in Exact please follow the steps below:

- 1. Go to the patients records and click on the
- 2. Click on 'Statement'

07/10/2019 ♥ 1008 INDIA Cash 100.00  Key □Non Account Items □ Resubmissions Current: 0.00  Very: 0.00 Total Due: 0.00 □Stop Credit Alert  00+ Days: 0.00 Payor Due: 0.00 □Don't Include in Statement Run											Statemen	t Account			
Image: Non Account Items         □ 1008         INDIA         Cash         100.00           Key         □ Non Account Items         □ Resubmissions	Date	8	17	2 9	Num	COT	Provider	Particulars	Fee	Debit	Credit		(	Open A	Int
Key       Non Account Items       Resubmissions       COT View       Dgtails       i       A         Current:       0.00       000       Stop Credit Alert       Image: Construction of the statement Run       Image: Constatement Run       Image: Construction	07/10/2019					1414				100.00					
Current:         0.00         Total Due:         0.00         Stop Credit Alert           50+ Days:         0.00         Payor Due:         0.00         Don't Include in Statement Run           60+ Days:         0.00         □No Statement Aging Messages	07/10/2019	U			1008		INDIA	Cash			100.00				
30+ Days:         0.00         Total Due:         0.00         Stop Credit Alert           50+ Days:         0.00         Payor Due:         0.00         Don't Include in Statement Run           60+ Days:         0.00         □No Statement Aging Messages															
00+ Days:         0.00         Total Due:         0.00         Stop Credit Alert           00+ Days:         0.00         Payor Due:         0.00         Don't Include in Statement Run           00+ Days:         0.00         Dno Statement Aging Messages         Distance	Key Non	Account	ltem	s ⊡R	esubmis	sions						COT View	Dgtails	i 2	h 1
0+ Days: 0.00 □No Statement Aging Messages				is ⊡R	esubmis	sions						<u>COT</u> View		i 2	A 1
00+ Days: 0.00 □ No Statement Aging Messages	Current:	0.0	0			sions	0.	00 🗆 Stop Credit Ale	ert			<u>COT</u> View		i 2	h d
Family Total: 0.00	Current: 30+ Days:	0.0 0.0	10 10 1	Fotal I	Due:	sions					11. <sup>11</sup> 144	<u>C</u> OT View		1 2	h d
	Current: 30+ Days: 30+ Days:	0.0 0.0 0.0	10 10 1 10 F	Fotal I	Due:	sions		00 Don't Include i	n Statement Ru			<u>C</u> OT View		1 2	h 1

 You then choose an individual provider if you would only like to show one dentist/hygienists work or leave this field black if you need to show treatment for everyone



The 'As at' date is best left as the date the statement is being created as it will give the patients total owing as the amount of the date set – having an up to date value will be easier for the patient to read.

Provider(s)			Multiple	(?)
As at	07/10/201	9 ~		
Days For Aging	30			
Which Transactions	Auto Sele	ction		
Invoice Detail	Group By	Payor Code ~		
Patient Balance	Total Owi	ng v		
		Edit Messages	]	
Number of Copies	1			
Printer	Printer			

 For 'Which Transactions' you have three options to choose from: Auto selection – this will choose all treatment and exclude resubmissions Manual Selection – this will allow you to choose which items are included on the statement and you will be presented with the box below to make your selections

Date			Number	Provider	Amount
07/02/19	Ð		1262	INDIA	200.00
07/02/19		西	1262	INDIA	-200.00
27/03/19	Ð		1486	INDIA	200.00
27/03/19	в		1487	INDIA	-34.00
27/03/19	2	E.	1486	INDIA	-200.00
27/03/19	64 C-	в	1487	INDIA	34.00
27/03/19	西		1488	INDIA	166.00
17/06/19	•	2	1488	INDIA	-166.00
07/10/19	Ð		2905	INDIA	100.00
07/10/19	6		1008	INDIA	-100.00
Select All	Sel	ect None		Total Se	lected: 0.00

**All transactions** – will bring up all lines from the transaction window including resubmissions.

5. Once you are happy select print, email or easy post to send this to the patient

#### Adjusting an invoice

If you have not used adjustments before you may need to use the steps below to set up a new adjustment type in Exact.

# Please Note: You may need to be logged in as a SUPER user to carry out the following steps:

If you already have an adjustment types set please ignore the steps below

- 1. Go to any patient file
- 2. Click on '£' sign
- 3. Highlight either an invoice or payment in the box
- 4. Click on 'Adjust'



- 5. Where it says 'Adjustment Type', click in the box and click the lined icon to the right of this a list of all correct adjustment types will be listed
- 6. Click +1 located in the bottom right hand corner of the 'View Adjustment Types' box
- 7. Enter a code of your choice
- 8. Enter a full description of your choice
- 9. Select 'Invoice Corrections
- 10. Click OK

The new adjustment type has now been set up.

To adjust the price of an invoice please follow the steps below:

- 1. Go to the '£' sign on the patients file
- 2. Highlight the invoice then click on adjust

												Statem	ent Accou	int		
0	Date	ð		a	<u>e</u>	Num	COT	P. Plan	Provider	Particulars	Fee	Debit	Credit		Oper	n Amt
	06-11-2018	: Ð	2			22924	126332		£STOCK	PPLANS Invoice	170.00					
	06-11-2018	1	•		3	22926	126332		£STOCK	PPLANS Invoice		170.00				
	26-11-2018				1	6159			ESTOCK	Debit Card			100.00			
	04-12-2018	0						1008	£STOCK	HH		2250.00			22	50.00
	06-12-2018	-B				22926	126332		ESTOCK	Treatment Resub			170.00			
	06-12-2018				- 3	22928	126332		ESTOCK	PPLANS Invoice		170.00				70,00
Ke	w TNon A	coount It	ome (	2 Res	suba	niccinne		ditens		COT View View Sta	tement Acr	nunt	- Dat	taile	1 10	
	y 🗆 Non A					nissions	Delete			COT View View Sta	tement Acc	ount	~ Det	tails	i A	3 4
	ay □Non A rent:	ccount It 2320.00		2 Res		nissions	Delete	d Items 2320.00	1	COT View View Sta				or other the		3 4
Cur			Tot		ue:	nissions	Delete		8 <u></u>	Transferration Transferration		ount Wallsong		tails 2320.0		3
Cur 30+	rent:	2320.00	Tot Pay	al Du	ue: ie:		Delete	2320.00 0.00	Stop Cr	Transferration Transferration				or other the		<b>3</b> d
Cur 30+ 60+	rent: Days:	2320.00	Tot Pay Tota	al Du	ue: ie:		Delete	2320.00	□ Stop Cr □ Don't In	edit Alert				or other the		3
Cur 30+ 60+	rent: · Days: · Days:	2320.00 0.00 0.00	Tot Pay Tota	al Du	ue: ie:		Delete	2320.00 0.00	□ Stop Cr □ Don't In	edit Alert clude in Statement Run		Wolfsong		or other the	0	3

- 3. On the 'create adjustment' screen add the amount that you need to adjust it by. If you add a whole number it will mean the patient owes more and adding a minus number means the patient pays less.
- 4. Press OK and this will either increase or decrease your invoice amount.

# **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.

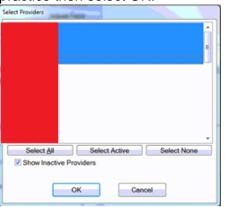
Set Default NHS Item
Please select your default NHS item
Transmit Claims
OK Cancel



- 2. Click on Claims Central
- 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)

		0
Completed COTs	2	Claim
Awaiting Transmission	0	Transmit
Awaiting Response	9	
Unresolved Responses	6	
Last Transmission on 17/02/2020 at 13:43:37	Last Received Schedu	le 31 Jan 2020 Import
	Close	
Claim		

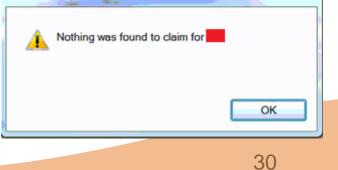
- 4. Click on
- 5. Click on <u>Multiple</u> then select all of the providers than carry out NHS treatment at the practice then select OK.



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

NHS Claim		
Provider(s)		Multiple
Date to	17/02/2020	
	OK Cancel	Ň

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'

NHS Claim
Print GP17 F ms
Print Claim Summary
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.

Transmit C	laims	
From	17/01/2020	
То	17/02/2020	
	ж	Cancel

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

Claims Central		
	-2-	0
Completed COTs	0	Claim
Awaiting Transmission	11	Transmit
Awaiting Response	0	
Unresolved Responses	7	
Transı	mission in Progress	
Last Transmission on 17/02/2020 at 12:17:26	Last Received Schedule	Import
	Close	

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

laims Central		
		?
Completed COTs	2	Claim
Awaiting Transmission	0	Transmit
Awaiting Response	1	
Unresolved Responses	6	
Last Transmission on 17/02/2020 at 14:11:43	Last Received Schedule	31 Jan 2020 Import
	Close	



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'

Liaims Central		•	
			0
Completed COTs		2	Claim
Awaiting Transmission		0	Transmit
Awaiting Response		1	
Unresolved Responses	2º	6	
Last Transmission on 17/02/2020 at	14:11:43	Last Received Schedule	31 Jan 2020 Import
		Close	

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.

NHS -	
Transmit Claims	-
Approvals	=
Responses	-
Payment Schedules	n
Claim Bundles Courses of Treatment	J
Earnings Summary Lapse List Lapse Letters	
NHS/Private Warnings	ī
UDA Manager	1
Set Default	C

### **Dealing with NHS Responses**

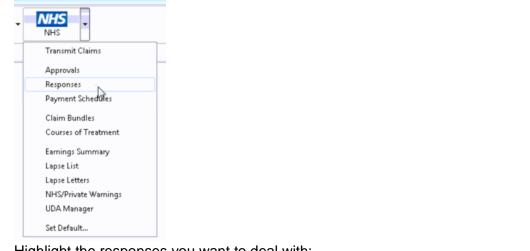
Please use the link below with a link to the most common NHS responses and how to resolve them within Exact.

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

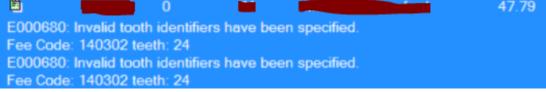


### How to Resubmit Responses

- 1. To amend / resolve any responses you receive;
- 2. Click into responses under the NHS drop down.



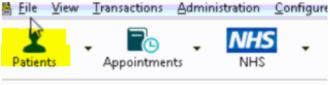
3. Highlight the responses you want to deal with;



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

Resubmit	Resolve	Notes	GP17	a 🗊 do
----------	---------	-------	------	--------

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**;



# **USER SETTINGS**

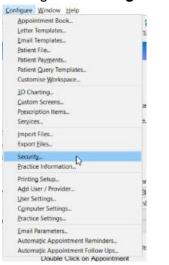
# **Adjusting Security**

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** 

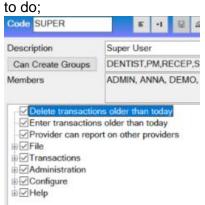
- First to find out what security group someone is in, go into configure > user settings
- 2. Find the user you want to look at and you can then see the security settings underneath the users name and password;

Code RACHAEL	8
Password	•••••
Security Group	SUPER
	Inactive

#### 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

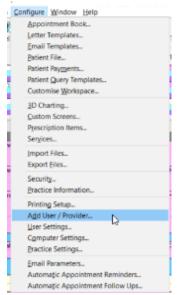


5. You can then click in these subsections and amend the security settings for that group.



### Adding New Users

 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.

Please enter the initials of the user that you wish to add				
New User	AB			
Does this use	er require an appointment book?	Yes		

- 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"
- 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;

35

Enter the security	settings for this	s user b	elow	
The security group access to. Which				
Security Group	DENTIST	-	к.	
Choose from below	ange password		(	
Cannot chang	in naceword			
Cannot chang	ver expires		-	
	ver expires ge password ev			



What kind of work does this	provider do?
Provider Type	Dentist ~

- 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.
- 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.

Rota Length (Weeks)	1 ~				
Start Date	18/02/2	18/02/2020 ~		Tue	
Extend to	18/02/2	18/02/2024 ~			
Week 1					
Starting: Works On:	Day Start	Day End	Lunch	Length	
🖂 Mon	08:00am	05:00pm	01:00pm	01:00	
18/02/2020 🖂 Tue	08:00am	05:00pm	01:00pm	01:00	
19/02/2020 Ved	08:00am	05:00pm	01:00pm	01:00	
20/02/2020 🗹 Thu	08:00am	05:00pm	01:00pm	01:00	
21/02/2020 🗹 Fri	08:00am	05:00pm	01:00pm	01:00	
22/02/2020 Sat	- Ferrer and a second second	Representation of the		*	
23/02/2020 🗌 Sun					

- 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.

# 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.



	and description of this report
Name	Allocated Payments
Description	Use To Pay Performers
Group on Favo	urite Reports
Check	urite Reports
Check Monthly	
Check	
Check Monthly	
Monthly	

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

Provider(s)	RACHAEL	Multiple	0		
From	Start of last month	Lances In Contrast			
То	End of last month				
	Simple Summary				
	O Summarise by Patient's Dentist				
	<ul> <li>Summarise by Who Got Paid</li> </ul>				
	Details and Summary ~				
	⊡ Hide Advance Payments				
	Include NHS and Other Payor Pay	ments			
Number of Copies	1				
Printer	Printer				

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.

		Pr	esto	on 8	s F						Sı	urg	geo	on	S	
Use Ros	fby: (LL) also	100000		14/11/200 02540 ALPOHA 14/12/200 3 X X	are D											
Date	Days	Pts. Seen	Hours Avel.	- Unbook Hrs.	nd - 1 %	Extra Hrs.	Hours Us Worked		P18.	Hrs.	Val	Pts	Hrs.	Val.	Pit.	Val.
14/11/05 AF DERD ACS HSP SWD Total		00000	97-00 24-00 97-20 36-20 24-00 68-50	00.20 20.00 00.10 20.00 00.10 00.10 00.10 00.10 00.00	90.5 900.0 90.7 75.7 94.4	00:00 07:00 00:00 00:00 00:00	00 00 00 00 00 00 00 00 00 00 00 00 00 00	00 00 00 00 00 <b>60</b>		00.40 00.00 01.00 01.40 00.10 03.50	0.00 0.00 0.00 0.00 0.00 <b>P0.00</b>		00.00 00.00 00.00 00.00 00.00 00.00	0.00 0.00 0.00 0.00 0.00 0.05		8-00 8-00 8-00 8-00 8-00 8-00 8-00 8-00 9-000 9-0000 9-000 9-000 9-000 9-000 9-000 9-000 9-000
							-E100	(Report	ė,							

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:

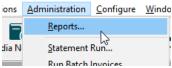
- 1. Number of failed or cancelled appointments
- 2. Number of new patients
- 3. Number of patients seen
- Estimated value of treatments. In order for the value to appear, treatment must be book from planned treatment, or the booked service must have a value associated with it (set under Configure >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



## FTA List (Patient List)

To get a list of patients who have failed their appointments in a given time period please follow the steps below:

1. Go to Administration > Reports



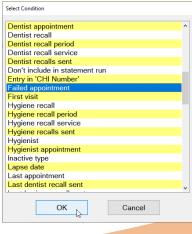
- 2. Scroll through the list and select 'Patient List' and double click on it.
- 3. Click into the 'Select Patients' field then click on the list button to the left

Last Name v
☑ Include Inactive
Multiple
1
Printer
Preview Email Export Close

- 4. Click on the <sup>+1</sup> in the bottom right hand corner
- 5. Enter 'FTA List' in the description field then click on the button to the bottom right hand side of the window.

Add Query Template	
Description	FTA List
( ) ● And ○ Or	E- dd
• And • O Or	
	OK Cancel

6. Choose 'Failed Appointment' from the list then select OK





7. On the screen that appears leave the dates as they are but put a check in 'Prompt for entries' (this will allow you to select the date range each time you run the report) the select OK and select OK again.

Edit Patient Selection					
Patients with ~ Prompt for entries					
Failed appointment:					
From Date	25/03/2020 ~				
To Date	25/03/2020 ~				
Treatment Codes					
Provider					
Tip: You can specify multiple codes by separating them with a comma, or a range of codes by placing ' <to>' between two codes. e.g. A<to>AZZ Tip: You can leave the Provider blank to mean any Provider.</to></to>					
ОК	Cancel				

- 8. Ensure 'FTA List' is highlighted and click
- 9. You should see the screen below where you can select 'Print' or 'Preview'

Print Patient List		
Sort Patients By	Last Name ~	?
	☑ Include Inactive	
Select Patients	FTA List	
Provider(s)	Multiple	
Number of Copies	1	
Printer	Printer	
Print	Preview Email Export Close	

10. Once you select 'Print' or 'Preview' you will see the screen below where you can enter your selected date range and then select OK and the report will run.

Patient Query	
Patients With:	
Failed appointment:	
From Date	1 week ago ~
To Date	Today ~
Treatment Codes	
Provider	
Tip: You can specify multiple codes by sep of codes by placing ' <to>' between two c Tip: You can leave the Provider blank to m</to>	odes. e.g. A <to>AZZ</to>
ОК	Cancel

When you run this list again skip steps 4 – 7.



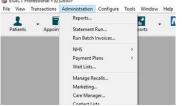
## Cashing Up Report

#### **Running the Cashing Up Report**

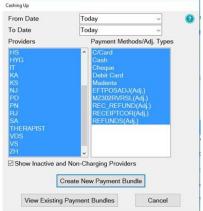
The 'Cashing Up' report is used to summarise all current payments received for the practice on a given day or for a date range. This report is run daily for all payments taken at the practice. It is not necessary to create a 'Cashing Up' slip for any payment method deposited directly into the Bank Account; e.g. Direct Debits.

Payments can be part of only one 'Cashing Up' report - once the report is run (using the Create New Payment Bundles button), previous payments can be viewed using the View Existing Payment Bundles button.

1. To run the cashing up report go to Administration > Reports



- 2. From the list of reports select 'Cashing Up' and double click on it
- 3. When you are shown the screen below set the to date and from date as 'Today' and select all the required providers and payment method/adjustment types by clicking on them (this will highlight them in blue)



- 4. Once this is done select 'Create New Payment Bundle'
- 5. If you would like the patents names select 'Print Deposit Slip' if you would only like to total amount taken then select 'Print Deposit Summary' (You can select both of these)

	Print Deposed Print Deposed	California (California)			
Select Layout	SOEstd1.213	5	~		
Number of Copies	1				
Printer	Soe				
	Edit Layou	ıt	Edit Export		
Print	Preview	Email	E	xport	Close

6. Click 'Print'



#### Using the report for two checks

The cashing up report is designed to be used for end of day banking. In order to run the cashing up report twice a day you will need to follow the steps above for the first time you run the cashing up e.g. before lunchtime then follow the steps below at the end of the day:

- 1. To run the cashing up report go to Administration > Reports
- 2. From the list of reports select 'Cashing Up' and double click on it
- 3. Click on View Existing Payment Bundles
- 4. Select the bundle with today's date from the list
- 5. Click on Update...
- 6. This will add any payments taken from after lunchtime to the end of the day to your existing bundle.

## 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  $\checkmark$  **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 deselected, 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.

- 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. Other options are:

Tick	То
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 TC'd 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.



# **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:



By default the current month is identified in bold:

May 2012	400
June 2012	452
July 2012	494
August 2012	501
September 2012	507

#### Detail:

Month	Patients	Total Recalls	Dentist	Hygienist	Effectiveness
August 2011	440	453	248	205	July 2011
September 2011	461	471	278	193	July 2011
October 2011	450	464	272	192	Do Not Recall 57
November 2011	497	503	301	202	Completed 121
December 2011	414	424	252	172	Moved On: 38
January 2012	482	494	287	207	Booked: 0
February 2012	532	548	335	213	E Future: 0
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:

Month	Patients	Total Recalls	Dentist	Hygienist	Effectiveness
August 2011	440	453	248	205	July 2011
September 2011	461	471	278	193	July 2011
October 2011	450	464	272	192	Do Not Recall 57
November 2011	497	503	301	202	Completed: 121
December 2011	414	424	252	172	Moved On: 38
January 2012	482	494	287	207	Booked: 0
February 2012	532	548	335	213	E Future: 0
March 2012	497	510	317	193	

Roll over any graph area for tooltip Effectiveness statistics display:



Со	lour	Representing	Good or bad Indicator?
	Dark green	Booked: Patients with recalls whose	Committed business - this is the best recall status. The
		appointments have been booked.	more dark green in the display, the better.
	Light green	Future: Patients with recalls in the	Still good. Patients remain as likely revenue for the
		future who do not have appointments.	future.
	Light blue	<b>Completed:</b> Patients who completed treatment.	Indicates work done.
	Dark blue	Moved On: Patients with	<b>Okay.</b> "The appointment did not happen, but we haven't
		appointments that have been postponed.	lost them yet; they are still in the system."
	Grey	Inactive: patients who are	Lost - there will be no further business from these
		permanently lost to the Practice.	patients.
	Dark red	Do not recall: whether due to a	Not lost just yet. We will not recall them, but these
		patient decision or a Provider decision.	patients may still choose to come back for further
			treatment.



Red	<b>Failures:</b> 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.

## **Old UDA/UOA Report**

Shows UDAs/UOAs claimed and completed over time, grouped by the date of TC.

From the reports list select the performers required for the report, can use **Multiple** to select specific providers. (Leaving blank will print the report for all providers in the practice)

- The report is run per contract you have entered in Exact
- You can select to show detail which will give the patient name and the COT number.
- The report can be run to group daily, weekly or monthly.

Date From	Days	Target	Claimed	Confirmed
01-04-14	30	141.51	0.00	0.00
01-05-14	31	113.21	0.00	0.00
01-06-14	30	113.21	0.00	0.00
01-07-14	31	141.51	0.00	0.00
01-08-14	31	113.21	0.00	0.00
01-09-14	30	141.51	0.00	0.00
01-10-14	31	113.21	0.00	0.00
01-11-14	30	113.21	0.00	0.00
01-12-14	31	141.51	0.00	0.00
01-01-15	31	113.21	0.00	0.00
01-02-15	28	113.21	0.00	0.00
01-03-15	31	141.51	0.00	0.00
Total for Performer ZH	365	1500.00	0.00	0.0
Total for contract 5664700001 (UDA)	effective 01-04-2014 - 31-03-2015	14099.00	14.00	0.0
	End Of Report			

The report will show the date from which will be the first of the month if run monthly or every seven days from the first day the contract started. It will give the details of how many days are in that period.

The target column will show the providers target as of that period/date. Then the claimed column shows how many UDA's have been TC'd through Exact and the confirmed column shows how many UDA's were confirmed by the board.

## **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.



Short Notice List Settings	
Add and Remove Appointment Clinics	?
Adding Appointments to the Short Notice List	
Prompt to add booked appointments to the list when booked within the following days	
7 to 40 days from today	
O Use a checkbox on the appointment workflow to add booked appointments to the list	
○ Don't prompt, add booked appointments manually	
Automatically add FTA appointments to the list	
Removing Appointments from the Short Notice List	
Remove booked appointments if they are still on the list & their appointment date is in 6 days	
Remove cancelled and FTA appointments if they are not rebooked within 2 weeks	
Short Notice Period	
Identify gaps in the appointment book up to $3 \rightarrow$ days ahead	
עד	
OK Cancel	

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'

00:20 India Scully Out Of O	ffice GEETHA	
	Edit Appointment	-
	Action Required	
	Reset Appointment Status	
	Cut to Clipboard	
	Copy to Clipboard and Edit	
	Delete Appointment	
	Cancel Appointment	
	Add to Short Notice List	
	Edit Patient	

- 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.



Short Notice List Settings		
Add and Remove Contact	Appointment Clinics	0
O No SMS	Automate SMS sending	
Contact patients in groups of	10	
Send gap available template	GAP AVAILABLE	
	Keyword Settings	
Stagger each SMS message by	5 minutes	
Send each patient a max of	2 gap available messages per 5 days	
Stop sending if gaps come within	2 hours of the current time	
	OK Canoel	

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.

Short N	ence mit search	
Add	and Remove Contact Appointment Clinics	0
Neve	r fill gaps for the following clinics	
	All Other Treatment	
	Dentist Space	
	Emergency	
	Examination	
H	Examinations	
E .	Facial Aesthetics	
	Priority 1	
ŏ	Priority 2	
ō	Priority 3	
	Priority 4	
	Priority 5	
	Priority 6	
Lian	ore clinic restrictions on same day	
L Ign	ore entitle resolutions on same day	
	OK	Canoel

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



# **PATIENT COMMUNICATIONS**

## **Presentation Manager**

You can view a video guide using the link below:

https://www.youtube.com/watch?v=9hzBacO1VZo&t=7s

### SMS

#### How to add SMS template

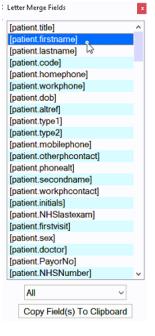
1. Go to Configure > SMS templates



- 2. Click on +1 from the toolbar
- 3. Enter a code and a description. Please note: the code needs to be unique

Code	TEST
Description	Test

- 4. Type your message into the available field.
- 5. To automatically pull information from the patient file click on <u>View Merge Fields</u> at the bottom left of the window and it will open the 'Letter Merge Fields' window
- 6. Select the merge field you need then click on 'Copy Field(s) to Clipboard'





7. To paste the merge field into the body of your SMS right click in the space and select 'Paste'

Dear		Truncate to 1 SMS's
	Undo	
	Cut	Dear [patient.firstname]
	Сору	
	Paste	i N
	Delete 18	45

8. A single SMS is 160 characters long – if the template you create is longer than 160 characters you will need to change the truncate option to as many texts as you need.

OK

- Truncate to 1 SMS's v (160) characters
- 9. Once you have finished your template click

#### How to contact patients by SMS

- 1. Go to the patients file that you wish to send an SMS to
- 2. Click on the substant button on the patients tool bar If you would like to free type your SMS please go to step 5
- 3. On the screen below click into the SMS Template field and then click on the list button to the right hand side

Provider	KP	
Specialist		
SMS Template		
Category	Admin Document	
Description		

- 5. Click OK
- You will be shown a preview of your SMS if you have not used a template you will need to type your SMS here
- 7. Once you are finished click OK and the SMS will go to your patient. Any SMS sent will be stored in the 'Contacts' tab.

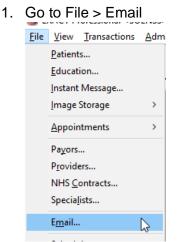


## Email

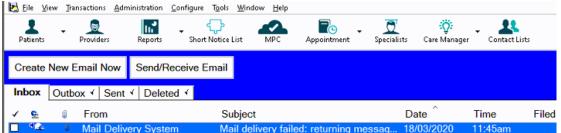
#### **Checking Inbox/Outbox**

In order to check emails that patients have sent to you and make sure that your emails have left the outbox follow the steps below:

It is important to check your emails at least twice a day.



- 2. Once the screen opens you will see four tabs
  - I. Inbox This will include any emails that have been sent to you. Any emails that are in bold font have not previously been opened.



II. Outbox – These are all the emails that are due to send but have not gone out yet (this may be because the email server is set to check itself every 10 minutes.

You can override this by clicking on Send/Receive Email

- III. Sent This contains all of the emails you have sent from Exact
- IV. Deleted This contains all of the emails which have been deleted from any of the other three folders.

#### **Resetting Failed Messages**

If any messages in your outbox show with the message **Failed to send** follow the steps below to resolve.

- 1. Click on the email that shows Failed to send so that it is highlighted.
- 2. Click on Reset Failed Messages on the bottom right hand side
- The email should change to Ready to send



4. Click on Send/Receive Email and your email should now move to the sent tab.

#### Filing an email to a Patient

If you receive an email from a patient where their email is stored on their 'Details' tab it will automatically file to their 'Contacts' tab. If they have emailed you from another email address you will need to manually file this to their contacts tab, to do this please follow the steps below:

- 1. Go to the inbox
- 2. Click on the email that is not linked to a patient
- Scully, India Accessing SOE Connect 18/02/2020 09:12am 3. Click on File
- 4. On the screen that appears click on the list button beside the 'File to patient' field and select the correct patient from the list.

File Email	
Address from this email:	
File to patient	
Patient's existing Email Address	^
	v
	Add this address to patient's email addresses
File to specialist	
Contact Information	
Description	Accessing SOE Connect
Category	
	OK Cancel

5. Once you have selected the patient if you would like to add the email address to their patient file add a check in 'Add this address to patient's email addresses'

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Address from this email:		
File to patient	ADMINI I	
Patient's existing		~
Email Address		
	• bis	4
	Add this address to patient's email addresses	
File to specialist		
Contact Information		
Description	Accessing SOE Connect	
Category		



6. Once you are finished select OK and the email will now be stored on the selected patients contacts tab.

Please note: if you select 'Add this address to patient's email address' the email will be stored on the patients details tab as a sending email address.

#### How to add email templates

You can view a video guide using the link below:

https://www.youtube.com/watch?v=KgAX2dUrHU8

#### How to contact patients by email

- 1. Go to the patients file that you wish to email
- 2. Click on the 🔛 icon on the patients toolbar

a. If you would like to free type your email please go to step 5

3. On the 'Email Details' screen click into the 'Email Template field and then click on the list button to the right hand side

	need to be replaced with their details.	
Provider	£STOCK	
Specialist		
	Email the selected Specialist	
Email Template		
Category	to Cliniview Software	
Description		
·	□ Include Email Signature	
	OK Cancel	

- Select the email template from the list and then click on
- 5. Click OK
- 6. You will be shown a preview of your email if you have not used a template you will need to type your email here.



7. Once you are finished click and the email will go to your patient. Any emails sent will be stored in the 'Contacts' tab.



# **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

