



EXACT RECEPTION GUIDE

Northern Ireland

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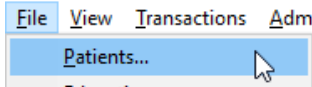
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PATIENT INFORMATION

Adding Patients

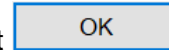
From the Patients Window

1. Go to File > Patients




2. Click on the  on the toolbar

3. Enter all of the relevant information for the patient and select



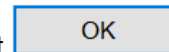
4. The patient will now show in your list.

From the Clipboard

1. From the appointment book double click on the  at the bottom left hand side of the appointment book columns.

2. Click on the  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

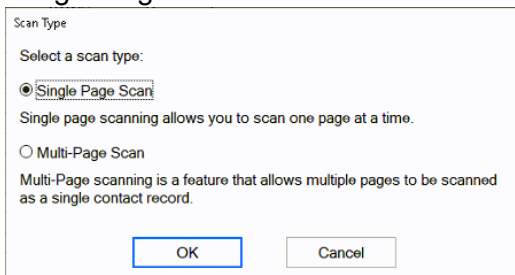
You can view a video guide using the link below:

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

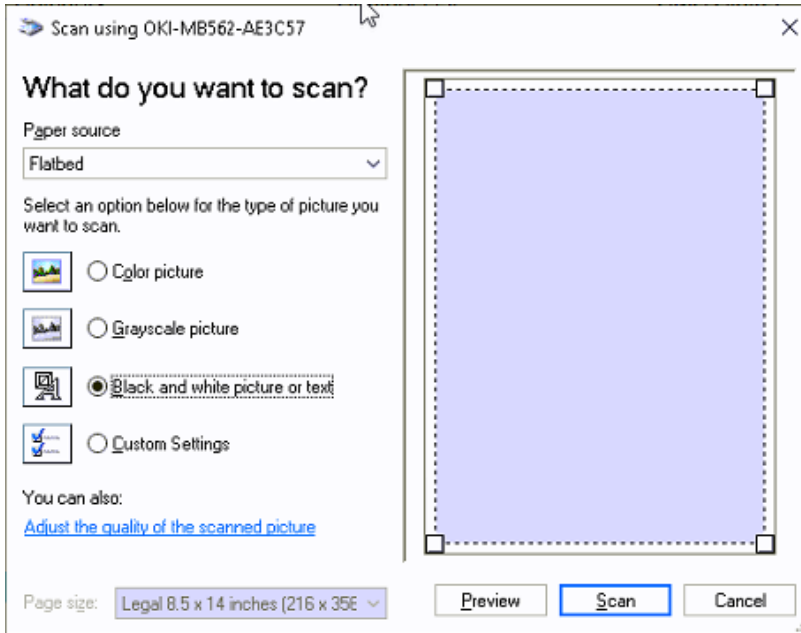
Scanning Patient Documents

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  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.



5. Click on
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 button and select from your available categories.

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>

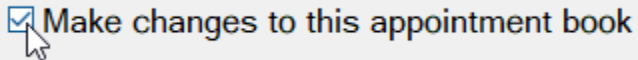
Configuring the Appointment Book

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.

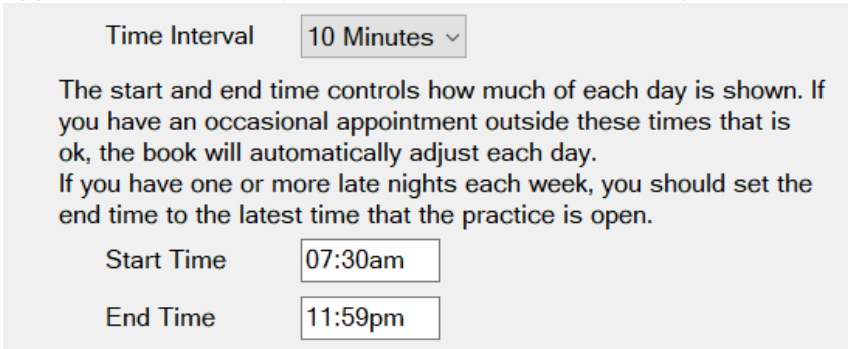


2. Add a check in 'Make Changes to this appointment book'



3. Select 

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.



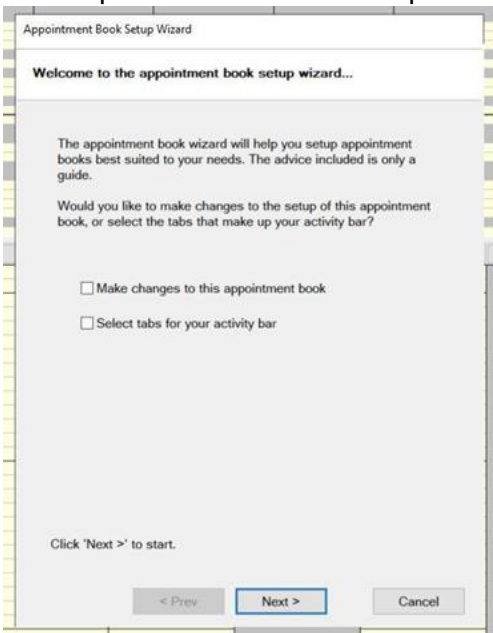
5. Once you have made the changes select ,  and 

Adding and Removing Tabs

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.



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



- Click on the option “select tabs for your activity bar” and press next twice and the next window should appear;



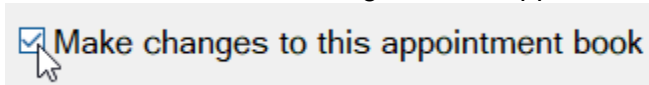
9. All of the available tabs should appear on this screen, the ones currently in use will appear in the right hand box. You can move the order they appear in but highlighting them and using the up and down arrows.
10. To add or remove a tab, highlight the option and then use the chevrons in the middle 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.



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

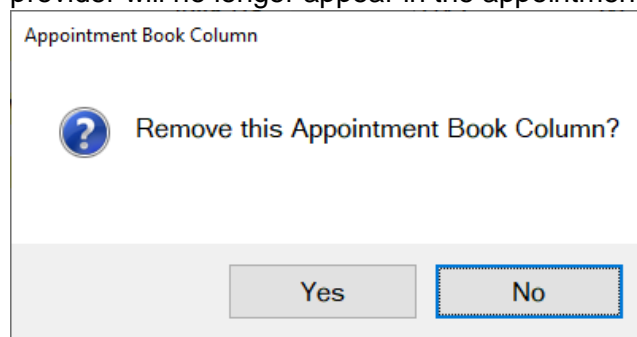


3. Select , and again

4. You will now see the 'Select the required columns.' Screen:

- I. To add a column – click on the providers initials in the 'Available Providers' window and click on the to move them into the 'Selected Columns' window. Once they appear under selected columns they will appear in the appointment book to can use the buttons to adjust the order of providers in the appointment book.

- II. To remove a column – Click on the provider in the 'Selected Columns' window then click on the button. Select on the window below and the provider will no longer appear in the appointment book.



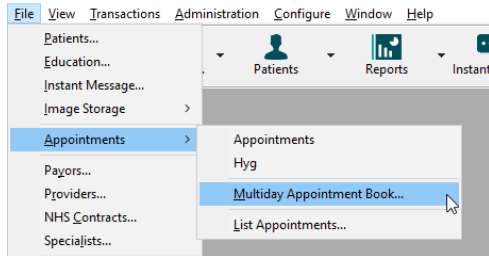
5. Once you are happy with your changes select .

Multiday Appointment Book

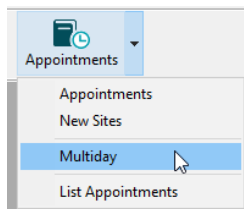
Opening the Multiday Appointment Book

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

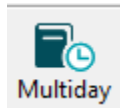
1. Go to File > Appointments > Multiday Appointment Book...



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

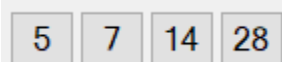


3. Click on the Multiday icon on the workspace

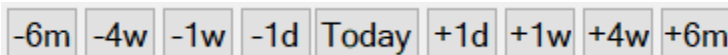


Multiday Options

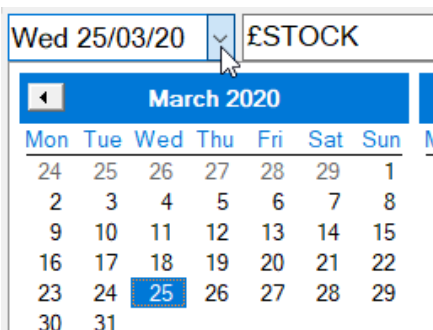
From the multiday appointment book you can view the appointments per provider over the course of five, seven, fourteen or twenty-eight days; you can do this by clicking on the respective numbers in the top right hand side of the screen



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



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

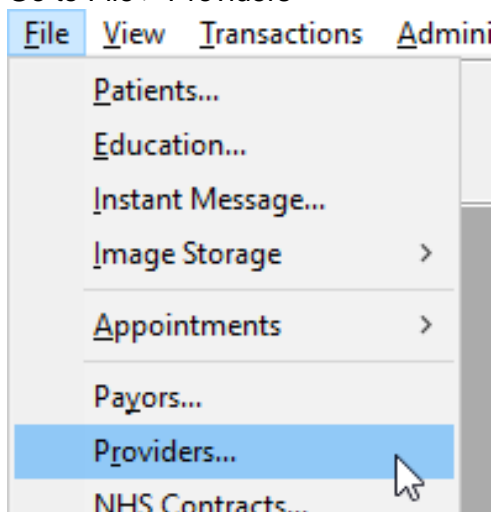


Amending the intervals and opening times

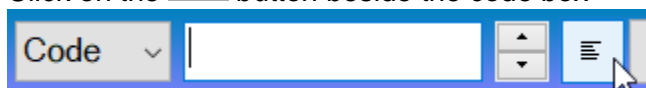
08:00
15
30
45
09:00

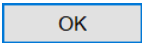
To adjust the time interval on the multiday appointment book as please follow the steps below:

1. Go to File > Providers





2. Click on the  button beside the code box



3. Choose the provider you would like to change the time interval for then select 
4. Click onto the **Appointments** tab
5. From this screen you can adjust the start and end time of the multiday appointment book and the Appointment Length (Time Interval)


Single Column and Multiday Book

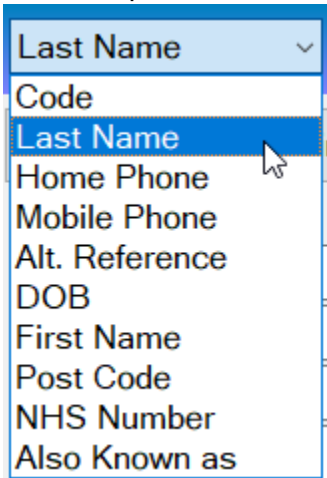
Appointment Book Start Time	<input type="text" value="07:30am"/>
Appointment Book End Time	<input type="text" value="06:00pm"/>
Appointment Length	<input type="text" value="00:15"/> 


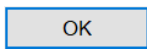
6. Once you have made your changes click on the  button on the toolbar.
7. To view the changes you will need to close the Multiday Appointment book and re-open it.

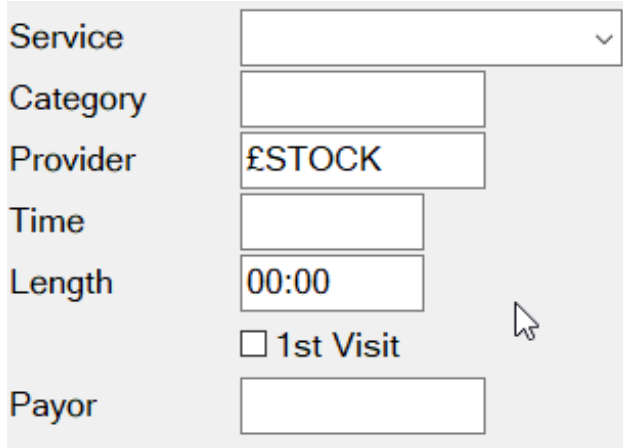
APPOINTMENTS

Booking Appointments

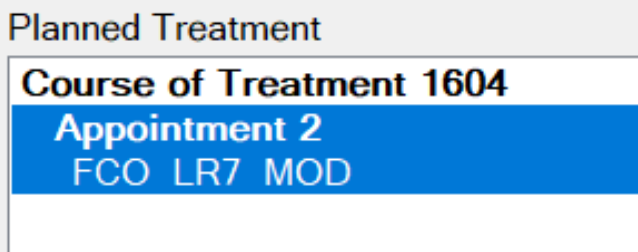
1. From the appointment book double click on the  at the bottom left hand side of the appointment book columns.
2. Select from the drop down list which filter you would like to use to find the patient. For this example I have used the last name field.



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 
5. Fill out the information shown below excluding the time field.



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

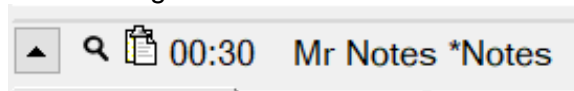


Once you have done this the information from the planned treatment will fill out the fields

Service	FCO LR7
Category	All Other Treatr
Provider	£STOCK
Time	
Length	00:30
	<input type="checkbox"/> 1st Visit
Payor	

Copy to Clipboard

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



- 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:

<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:

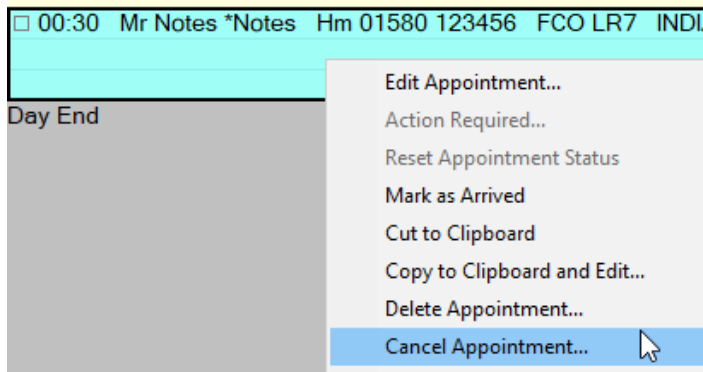
<https://www.youtube.com/watch?v=mph6ubJBOs>

Cancelling Appointments

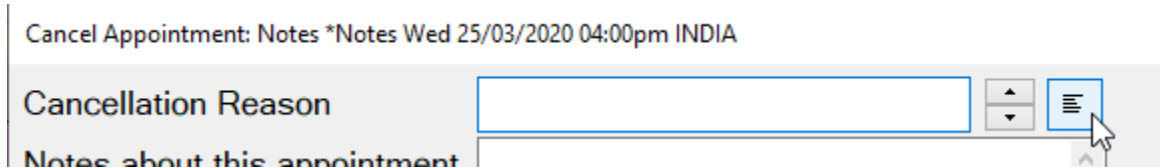
From the Appointment Book

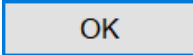
To cancel a patients appointment from the appointment book please follow the steps below:

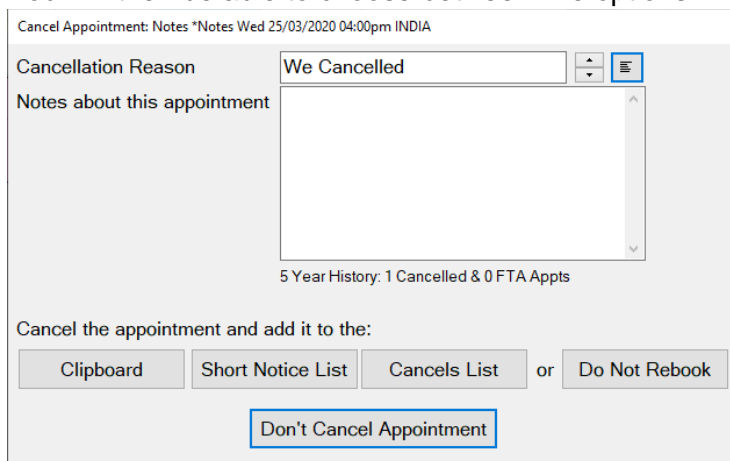
1. Right click on the appointment and select 'Cancel Appointment...'



2. Click into the 'Cancellation Reason' field then click on the  button.





3. Select a cancellation reason from the list then select 
4. Enter any notes that you require
5. You will then be able to choose between five options:




- Clipboard** – this will put the appointment on the clipboard. This is useful for when an appointment is being rearranged at the point of cancellation.
- 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.
- 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.
- 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.

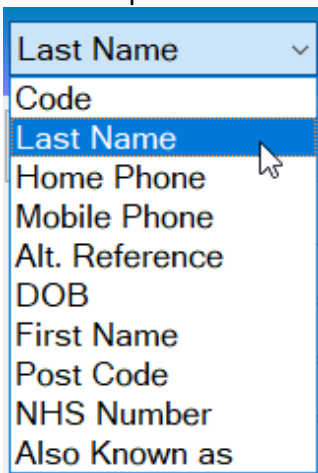
- V. Do Not Cancel Appointment – this will leave the appointment in the diary.
6. Once you cancel the appointment in will no longer show in the appointment book on that date/time but you will see a line on the ‘This patient’s appointments’ which shows the details of the appointment with the cancellation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


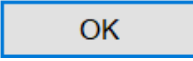
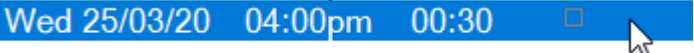

This patient's appointments

	Date	Time	Length	Status
	Wed 16/01/19	11:00am	00:30	✓
	Wed 19/02/20	09:15am	00:30	⊘ Con...
	Mon 23/03/20	03:00pm	00:30	283 ...
	Tue 24/03/20	09:30am	00:30	⊘
	Wed 25/03/20	04:00pm	00:30	⊘ We ...

From the ‘This patient’s appointments’ Window

1. From the appointment book double click on the  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.




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 
5. Click on the appointment you wish to cancel so that it is highlighted. 
6. Click on the  button
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.

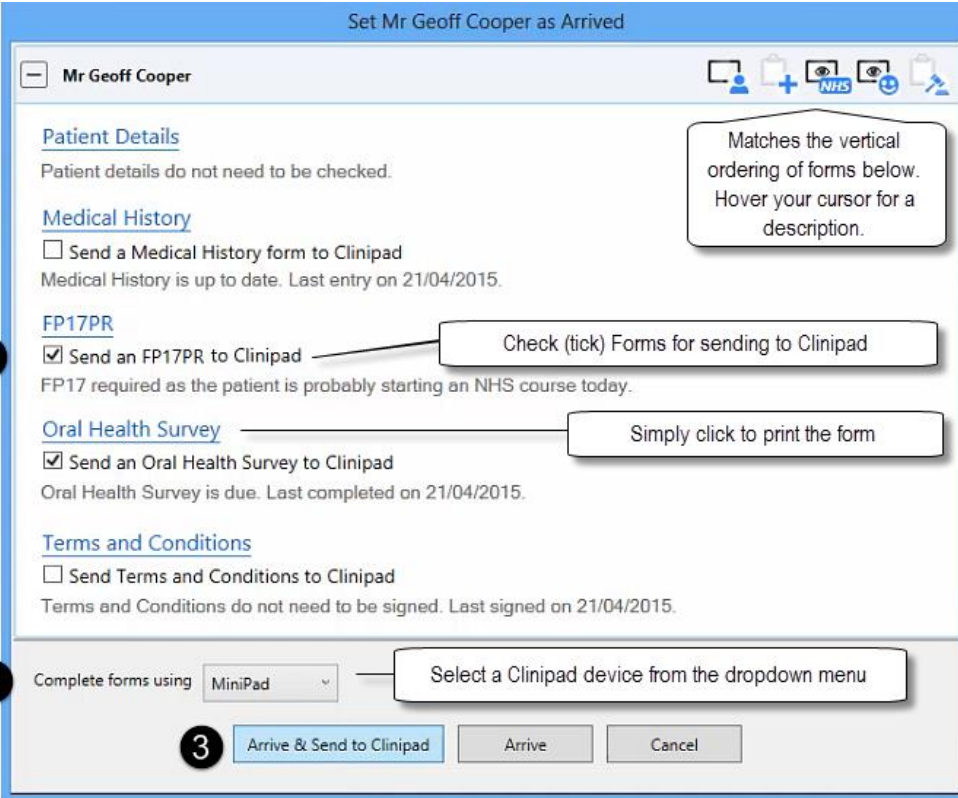
Reception Workflow

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)



The screenshot shows a software interface titled "Set Mr Geoff Cooper as Arrived". It contains several sections with checkboxes and callouts:

- Patient Details:** "Patient details do not need to be checked."
- Medical History:** "Send a Medical History form to Clinipad" (checkbox), "Medical History is up to date. Last entry on 21/04/2015."
- FP17PR:** "Send an FP17PR to Clinipad" (checkbox, checked), "FP17 required as the patient is probably starting an NHS course today." Callout: "Check (tick) Forms for sending to Clinipad".
- Oral Health Survey:** "Send an Oral Health Survey to Clinipad" (checkbox, checked), "Oral Health Survey is due. Last completed on 21/04/2015." Callout: "Simply click to print the form".
- Terms and Conditions:** "Send Terms and Conditions to Clinipad" (checkbox), "Terms and Conditions do not need to be signed. Last signed on 21/04/2015."
- Device Selection:** "Complete forms using" dropdown menu with "MiniPad" selected. Callout: "Select a Clinipad device from the dropdown menu".
- Buttons:** "Arrive & Send to Clinipad" (highlighted with a '3'), "Arrive", and "Cancel".

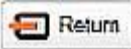
Additional callouts include: "Matches the vertical ordering of forms below. Hover your cursor for a description." and "1" next to the FP17PR checkbox.



The screenshot shows a software interface with a menu bar: "Cancels", "Contact Lists", "Arrivals", "Short Notice List", "Clinipad", "Follow Up", "Recalls", "Departures". The main area shows a patient list:

- Mr Wolverine Fullbellow (iPad Mini) - 2 Minutes, 26 Seconds - Return
- The Zindlestone Family (3) - Issue
- Mr Thornyn Yollershiel - Check & Dismiss, Issue

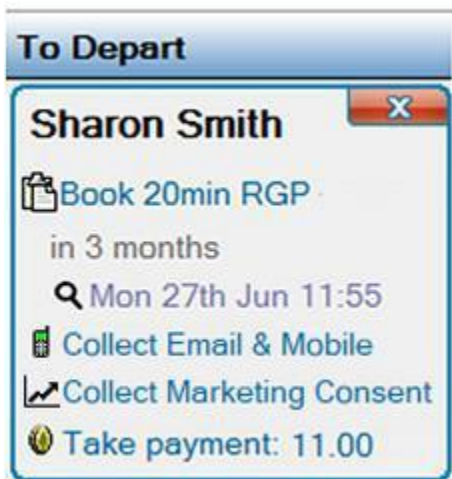
1. Check (tick) to specify which forms to send to Clinipad.
2. Select a Clinipad hardware device to issue to the patient.
3. Select Arrive and Send to Clinipad so that EXACT can prepare the Clinipad.
4. Issue the patient with the Clinipad and offer brief instructions.

5. When the patient returns it, click the  button

If you need the patient to use it again, click the  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 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.

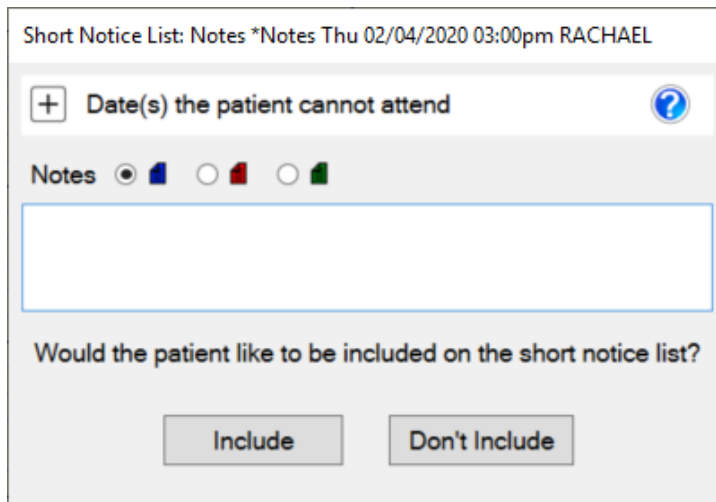
The receptionist will need to click on each of the items in the list and carry out the task.


Short Notice List


Adding a Patient to the Short Notice List

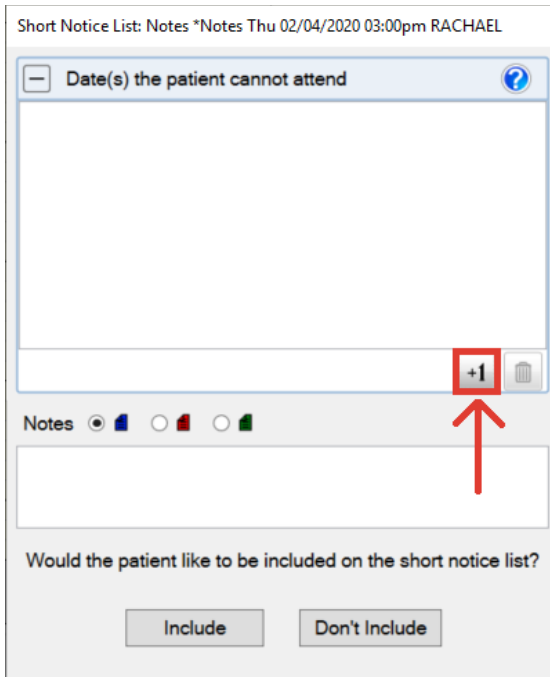
When you create a patients appointment in the next 7 to 40 days, you have the option of adding that patient to a **Short Notice List**, which appears on you appointment book tabs. To add a patient, simply make their appointment as normal, and follow the steps below:


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

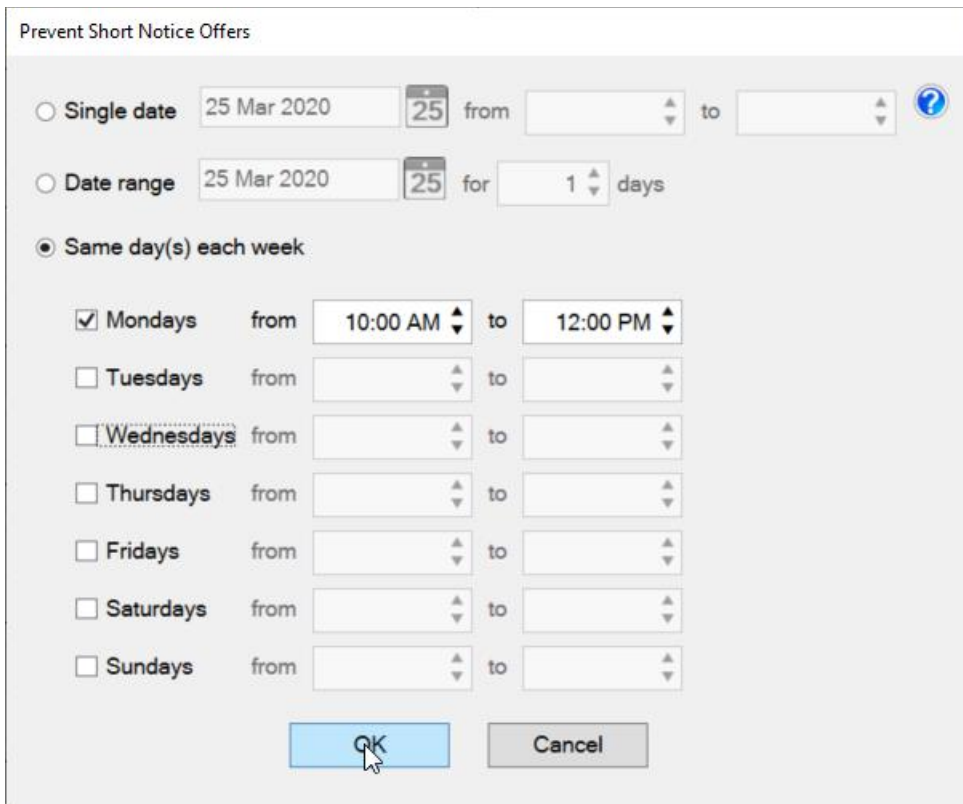


1. If the patient wants to be on this list you set the dates/times they cannot attend. To do this click on the  by **Date(s) the patient cannot attend**

2. Then click on the  button



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



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

Would the patient like to be included on the short notice list?

- Once you are happy with the availability click on and the patient will now show as available on the Short Notice List

Patient	Appointment	Length	Provider
Mr Notes *Notes	09/04/2020 02:30pm	00:30	RACHAEL

Best Suited Gaps for Mr Notes *Notes

Thu 26/03/2020 - 12:30pm - RACHAEL - 00:30

Contacting a Short Notice patient

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

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

SMS Patients to Fill Gap: Thu 03:00pm for 06:00 - BC

No suitable patients can be found to fill this gap. This may be due to patients not having SMS contact details or patients reaching their maximum contact limit. Please select the Short Notice List button to view all possible patients on the list.

- 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

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

Follow Up	Cancels		
Appt	Date	Time	S...
	25/03/20	12:00	⊘
	25/03/20	01:30	⊘
	25/03/20	02:30	⊘
	25/03/20	02:30	⊘
	25/03/20	03:30	⊘
	30/03/20	Cancelled	
	06/04/20	Deleted	
		Failed	
Appt Status	Cancelled		

- 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

- Click onto the **Cancels** tab
- Click on **No Rebook**
- 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 appointment from the cancel list? (It will still be recorded in the patient's history)

Remove the selected appointment only

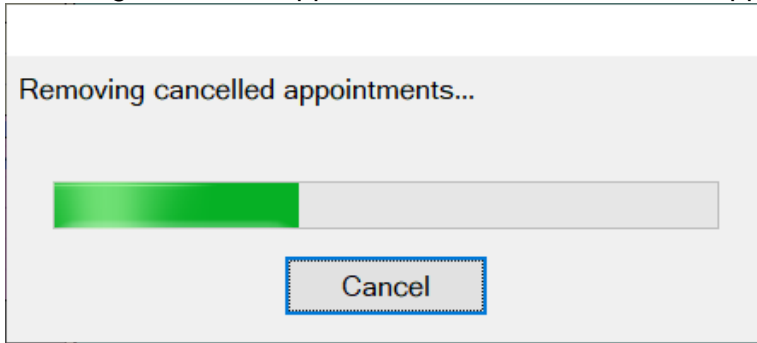
Remove a range of cancelled appointments

From Date

To Date 

- Select

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



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 £ or from the 'To Depart' bar click on 'Take Payment' as shown below



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'

A screenshot of the "Payment" form in the Exact software. The form includes several fields: "Code" (value: *NOTES N), "Date" (value: 07/10/2019), "Provider" (value: INDIA), "Paid By" (value: Mr Notes *Notes), "Type", "Family Members", "Stock Items", "Discount Amount" (value: 0.00), "Discount Reason", "Current Owing" (value: 100.00), "Add Planned:" (value: 0.00), "Payment Due" (value: 100.00), "Payment Amount" (value: 100.00), "Payment Method" (value: Cash), and "Comment". The "Process" button at the bottom is circled in red. The "Payment Amount" field is also circled in red.

- 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.

Payment

Print Receipt

Print NHS Receipt


Print Statement

Don'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:

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

Transactions: Mr Notes Notes

						Statement Account			
Date	Num	COT	Provider	Particulars	Fee	Debit	Credit	Open Amt	
07/10/2019	2905	1414	INDIA	Invoice		100.00			
07/10/2019	1009		INDIA	Cash			200.00	-34.00	

Key: Non Account Items Resubmissions

Current: -34.00

30+ Days: 0.00 **Total Due:** -100.00 Stop Credit Alert

60+ Days: 0.00 Payor Due: 0.00 Don't Include in Statement Run


90+ Days: -66.00 No Statement Aging Messages

Family Total: -100.00

Mr Notes Notes -100.00

Mrs Notella Notes 0.00

Close Statement Payment Refund Adjust **Transfer** Write Off Allocate Opening Balance FP17 Resubmit

- 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

Transfer Wizard

Transfer Transaction(s)

Please select the transaction(s) to transfer.

Date	Provider	Num	Amount	Open
07/10/2019	INDIA	1009	34.00	

Select All

Amount: 34.00

Transfer to: Patient

< Prev Finish Cancel

- 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.
- Once you have filled out all the items on the screen select 'Finish'
- You will then see a line showing the transfer amount as a debit on the patient file as show below

Transactions: Mr Notes Notes

Date	Num	COT	Provider	Particulars	Fee	Debit	Credit	Open Amt
07/10/2019	2905	1414	INDIA	Invoice		100.00		
07/10/2019	1009		INDIA	Cash			200.00	
07/10/2019	1009		INDIA	Transfer to Mrs ...		34.00		

Key Non Account Items Resubmissions


Current: 0.00
 30+ Days: 0.00 **Total Due: -66.00**
 60+ Days: 0.00 Payor Due: 0.00
 90+ Days: -66.00

Stop Credit Alert
 Don't Include in Statement Run
 No Statement Aging Messages

Family Total: -100.00

Mr Notes Notes -66.00
 Mrs Notella Notes -34.00


Buttons: Close, Statement, Payment, Refund, Adjust, Transfer, Write Off, Allocate, Opening Balance, FP17, Resubmit

- 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...	Type	Num	Comment	Provider	Alloc. Date	Amount
07/10/2019	Receipt	1009		INDIA	07/10/2019	-34.00

Total allocations: -34.00
 Total Open: 0.00
 Total Amount: 34.00

Name: Mr Notes Notes 
 Comment: Mrs Notella Notes

Close

- 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:

Refund Wizard

Choose Credit, Refund or Correction Type

Credit note
Issue a credit note to the patient to use against existing or future work.

Refund unused deposit (Max 200.00)
Return money to the patient where they have overpaid or paid in advance for treatment they no longer intend to have.

Refund money paid for work done
Return money to the patient where treatment was provided. The patient's balance will not be changed, as the treatment will be discounted by the same amount as the refund.

Correct a receipt
Fix up a receipt where the amount was entered incorrectly. The patient's balance will change up or down depending on the correction.

Click 'Next >' to start.

< Prev Next > Cancel

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.

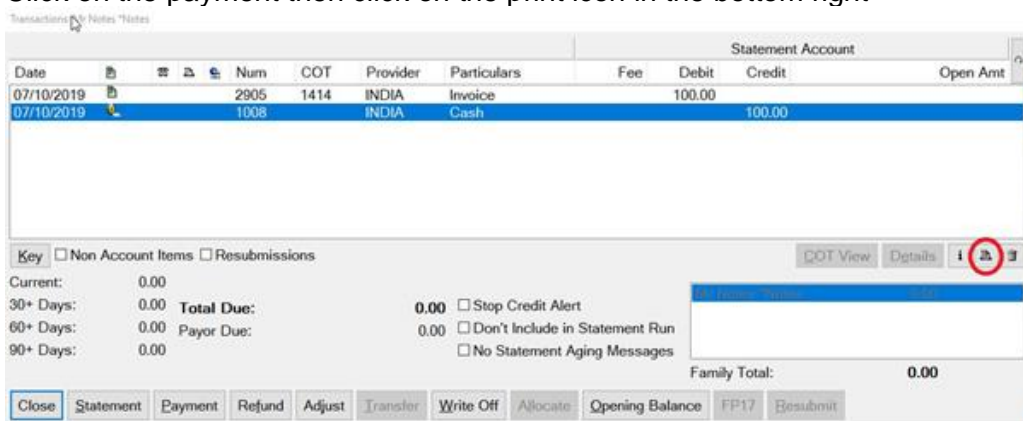
Printing a Receipt

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

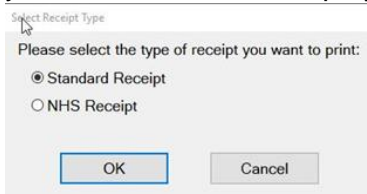
1. Go to the patients records and click on the



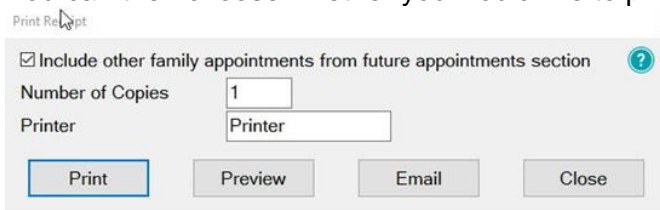
- Click on the payment then click on the print icon in the bottom right



- 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




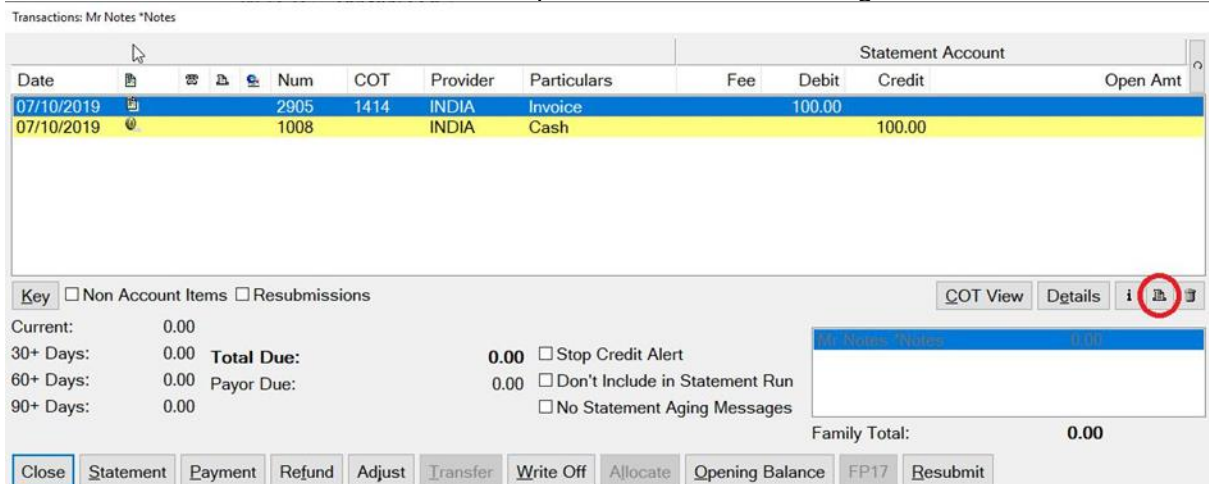
- You can then choose whether you would like to print or email the receipt to the patient



Printing an Invoice

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

- Go to the patients records and click on the 
- Click on the invoice line then click on the print icon in the bottom right



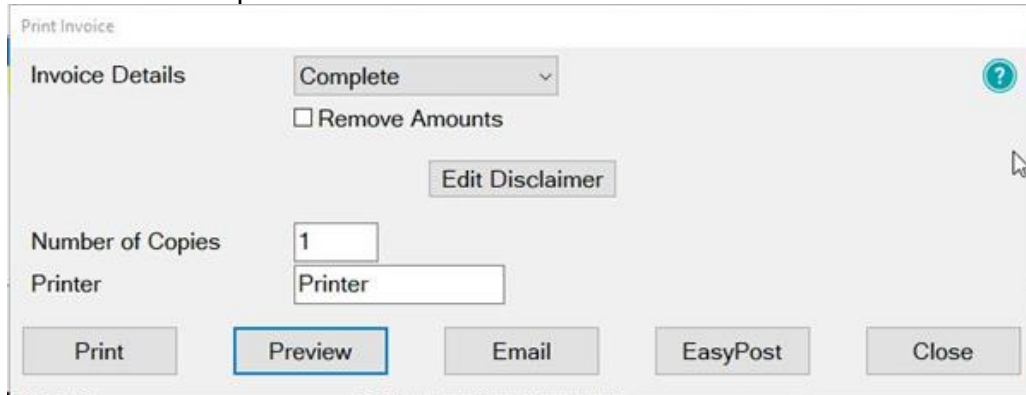
- You can then use the drop down to choose the level of detail in the invoice



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


Remove Amounts

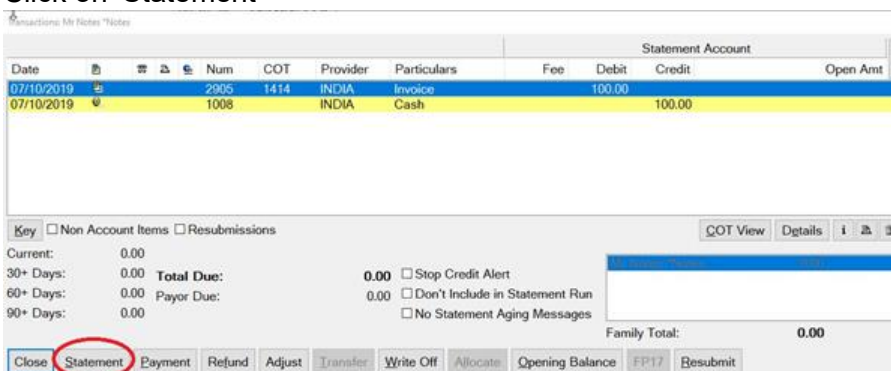
- Once you are ready you can print, email or select easy post (if you are using it) to send the invoice to the patient.



Printing a Statement

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

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



- 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.

Print Statement

Provider(s) Multiple ?

As at 07/10/2019

Days For Aging 30

Which Transactions Auto Selection

Invoice Detail Group By Payor Code

Patient Balance Total Owing

Edit Messages

Number of Copies 1

Printer Printer

Print Preview Email EasyPost Close

- 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

Transaction Selection

Select transactions to include on the statement

Date	Number	Provider	Amount
07/02/19	1262	INDIA	200.00
07/02/19	1262	INDIA	-200.00
27/03/19	1486	INDIA	200.00
27/03/19	1487	INDIA	-34.00
27/03/19	1486	INDIA	-200.00
27/03/19	1487	INDIA	34.00
27/03/19	1488	INDIA	166.00
17/06/19	1488	INDIA	-166.00
07/10/19	2905	INDIA	100.00
07/10/19	1008	INDIA	-100.00

Select All Select None Total Selected: 0.00

OK Cancel

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

- 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

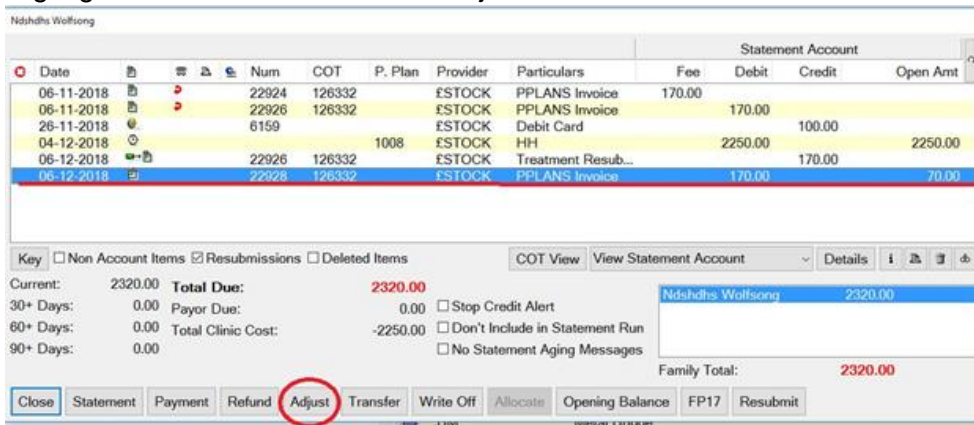
- Go to any patient file
- Click on '£' sign
- Highlight either an invoice or payment in the box
- Click on 'Adjust'

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



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.

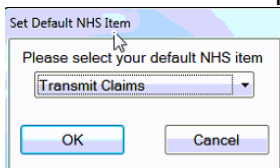
TRANSMISSIONS & RESPONSES

How to Transmit

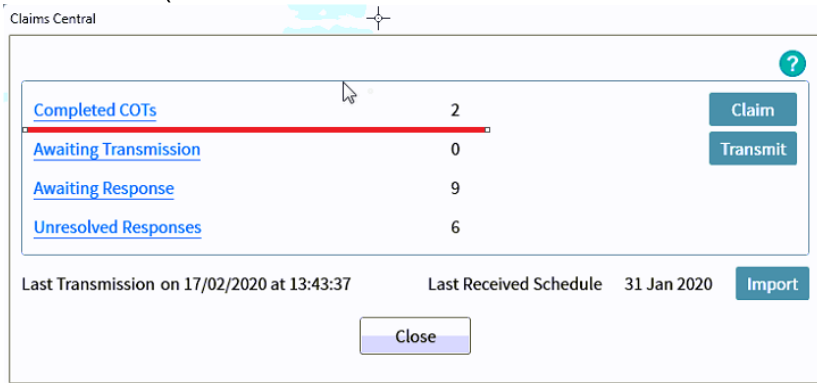
1. Click on the NHS icon on the workspace at the top of Exact



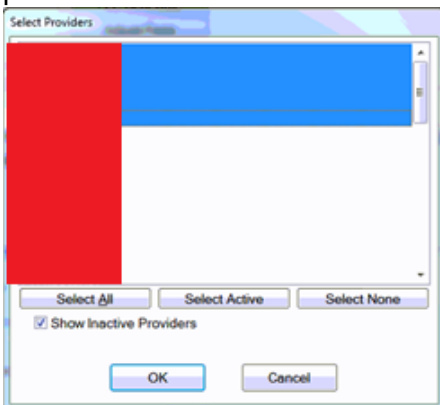
- a. You may be presented with the window shown below ensure 'Transmit Claims' is selected and press OK – this screen will only appear once.



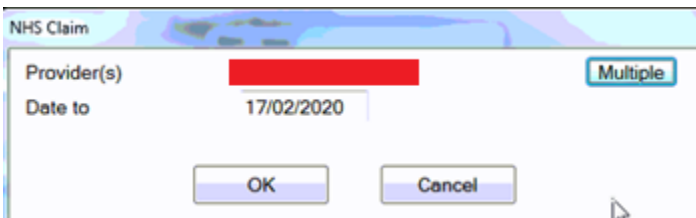
- Click on **Claims Central**
- From the screen you will see the number of COTs awaiting to be sent on the 'Completed COTS' line. (these are all the claims the dentist has TC'd since your last transmission)



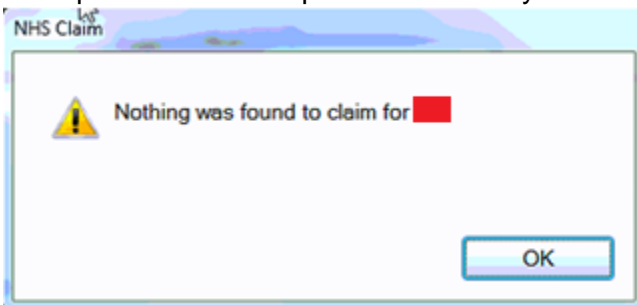
- Click on **Claim**
- Click on **Multiple** then select all of the providers than carry out NHS treatment at the practice then select OK.



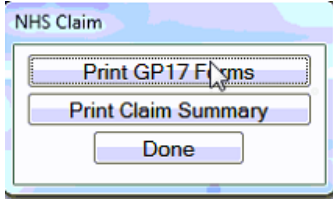
- You will then see the screen shown below ensure that the 'Date to' shows today's date and select OK.



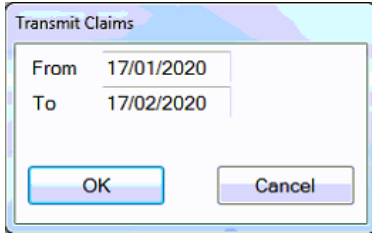
- If the provider has completed no claims you will be shown the box below select OK.



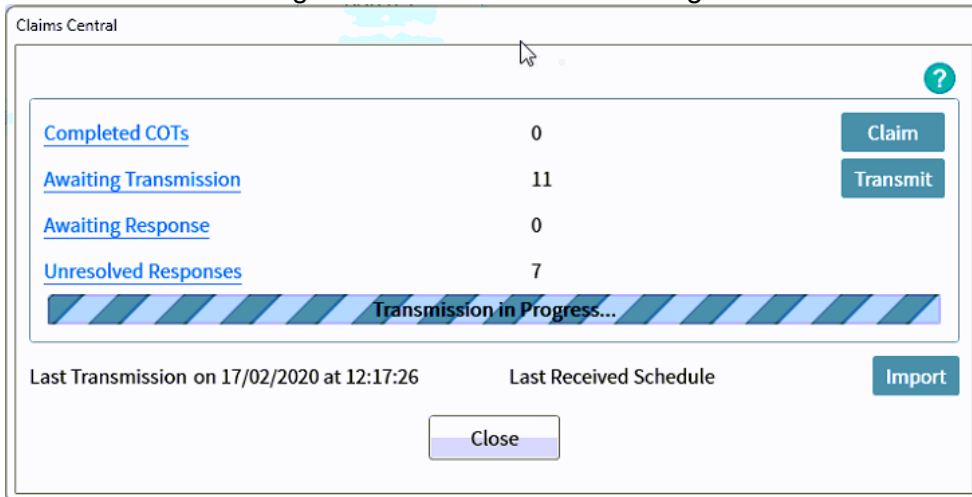
- You should then see the screen below, if you would like to print a list of all the claims sent select 'Print Claim Summary' if not select 'Done'



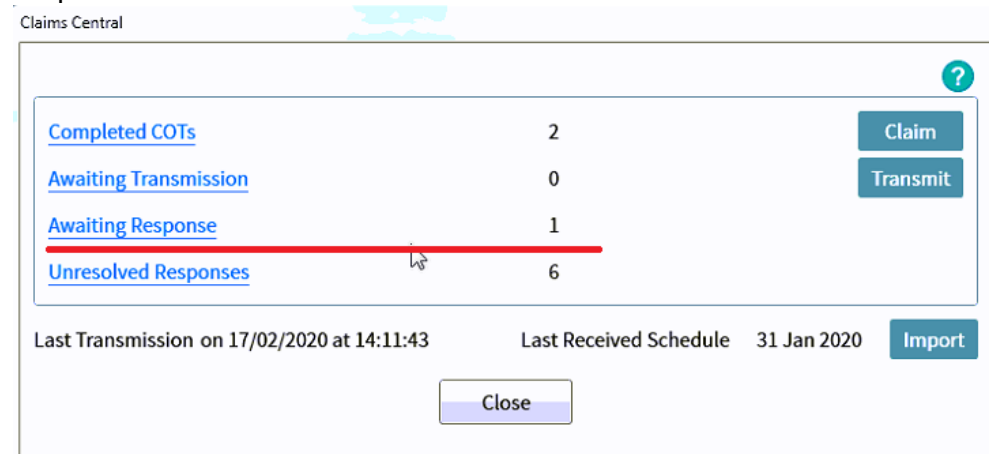
- You will then see the screen below and it will automatically display a three month window. Do not amend these dates and select OK.



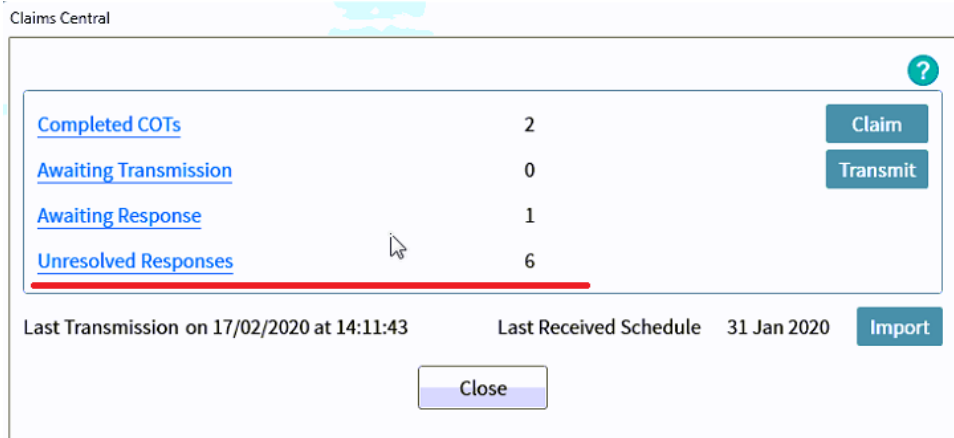
- The screen will then show the transmission in progress bar along the bottom and the number of claims being sent will show in the 'Awaiting Transmissions' line



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



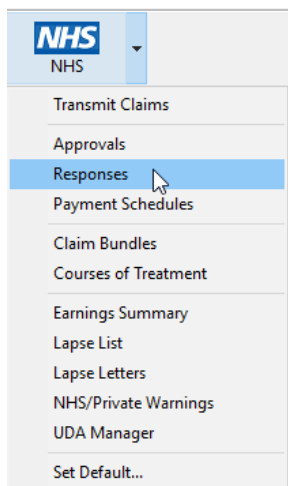
12. Once you do another transmission anything responses the board have sent regarding your claims will come back in. They will show under 'Unresolved Responses'



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 Responses

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.



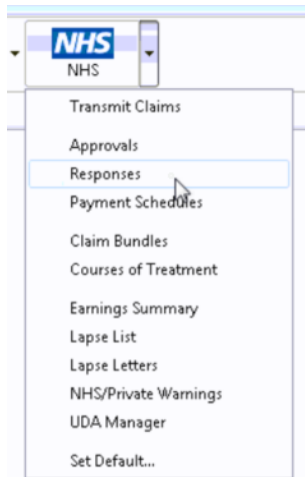
Dealing with NHS Responses

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

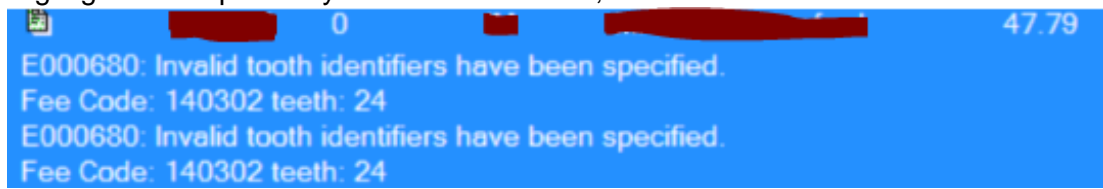
<https://www.soessupport.co.uk/edental/responses.html>

How to Resubmit Responses

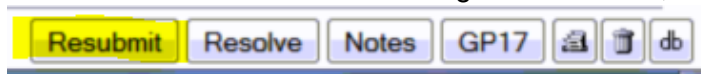
1. To amend / resolve any responses you receive;
2. Click into responses under the NHS drop down.



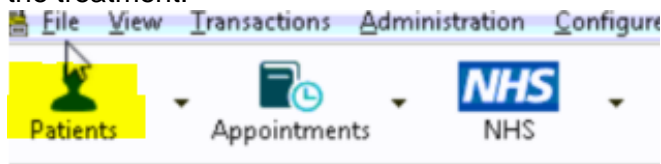
3. Highlight the responses you want to deal with;



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.



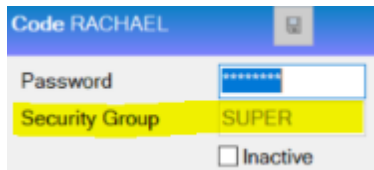
6. Before you TC the treatment back through, please check that you have “**prompt for date when charging**” checked under your **user settings**;

USER SETTINGS

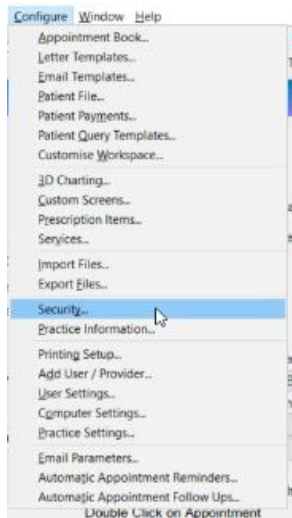
Adjusting Security

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

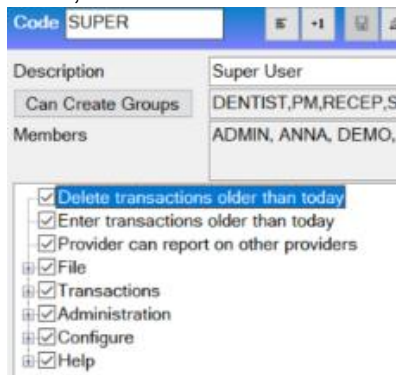
1. First to find out what security group someone is in, go into **configure > user settings**
2. Find the user you want to look at and you can then see the security settings underneath the users name and password;



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



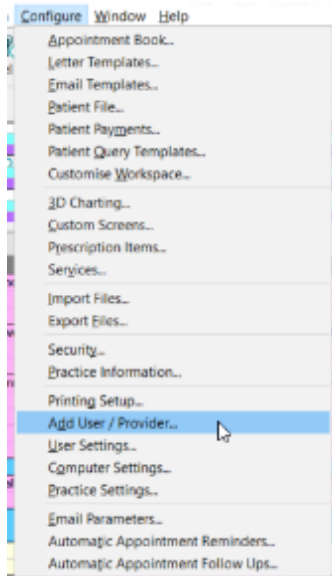
4. Using the **Code** section find the group you want to amend. Everyone listed underneath is in this security group and everything ticked it what they have the ability to do;



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.

A screenshot of the 'Add User Wizard' window. The title is 'Please enter the initials of the user that you wish to add'. There is a text input field for 'New User' containing 'AB'. Below it, there is a question 'Does this user require an appointment book?' with two radio buttons: 'Yes' (selected) and 'No'.

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 as the providers name and qualifications. This is the section where you fill in the provider type;

People - Security

A screenshot of the 'People - Security' window. The title is 'Enter the security settings for this user below'. The text says 'The security group determines which areas of EXACT a user has access to. Which security group should this user belong to?'. There is a dropdown menu for 'Security Group' with 'DENTIST' selected. Below that, there is a section 'Choose from below to implement your password policy' with three checkboxes: 'User must change password at next login' (checked), 'Cannot change password', and 'Password never expires'. There is a text input field for 'User must change password every' with '30' entered and 'days' next to it. At the bottom, there is a text input field for 'Enter a password for them to use on their next login' with 'Password' and two asterisks next to it.

What kind of work does this provider do?

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.

Rota Length (Weeks)

Start Date Tue

Extend to Sun

Week 1

Starting:	Works On:	Day Start	Day End	<input checked="" type="checkbox"/> Lunch	Length
18/02/2020	<input checked="" type="checkbox"/> Mon	08:00am	05:00pm	01:00pm	01:00
19/02/2020	<input checked="" type="checkbox"/> Tue	08:00am	05:00pm	01:00pm	01:00
20/02/2020	<input checked="" type="checkbox"/> Wed	08:00am	05:00pm	01:00pm	01:00
21/02/2020	<input checked="" type="checkbox"/> Thu	08:00am	05:00pm	01:00pm	01:00
22/02/2020	<input type="checkbox"/> Sat				
23/02/2020	<input type="checkbox"/> Sun				

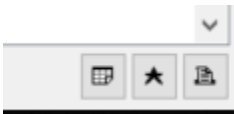
10. The next two pages will asked you which appointment book (if you have more than one) that you want the provider to show in and how they want their stickman (patient at the door) settings to show.
11. Press **Next >** and this is where you can add in the provider NHS details and press **Finish**,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

Enter the name and description of this report

Name

Description

Group on Favourite Reports

- Check
- Monthly**
- Weekly

⏪ -1 📄

- 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 ?

From

To

Simple Summary
 Summarise by Patient's Dentist
 Summarise by Who Got Paid

Hide Advance Payments
 Include NHS and Other Payor Payments

Number of Copies

Printer



- 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:		10/15/2005 17:58														
Printed By:		DEMO														
Printed At:		All Providers														
From Date:		10/10/2005														
To Date:		10/15/2005														
Breakdown By Providers:		X														
Use Rosters:		X														
Daily Summary:		X														
Weekly Summary:																
Monthly Summary:																
Date	Days	Pts. Seen	Hours Avail.	-Unbooked- Hrs.	Extra %	Hours Worked	Used %	Failed Pts.	Failed Hrs.	Failed Val.	Cancelled Pts.	Cancelled Hrs.	Cancelled Val.	New Pts.	New Val.	
10/10/05																
AP	1	0	37:00	00:20	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	93.0	00:00	00:00	0.0	6	00:00	0.00	0	00:00	0.00	0	0.00
RES	1	0	37:30	00:30	88.7	00:00	00:00	0.0	3	01:00	00.00	0	00:00	0.00	0	0.00
AGP	1	0	36:20	04:40	73.7	00:00	00:00	0.0	4	01:40	0.00	0	00:00	0.00	0	0.00
SW	1	0	34:00	23:30	67.9	00:00	00:00	0.0	1	00:30	0.00	0	00:00	0.00	0	0.00
Sub Totals	5	0	168:50	65:00	94.4	00:00	00:00	0.0	11	03:50	\$0.00	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  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.

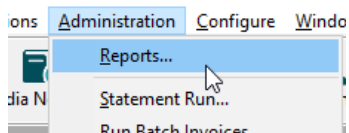
The report includes the following:

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').

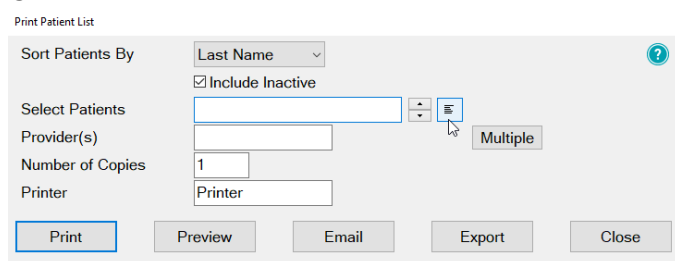
FTA List (Patient List)

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

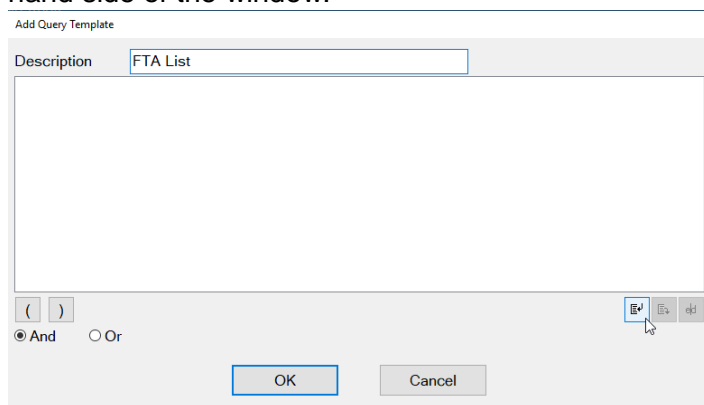
1. Go to Administration > Reports



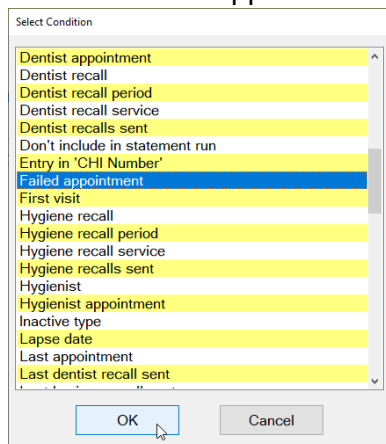
2. Scroll through the list and select 'Patient List' and double click on it.
3. Click into the 'Select Patients' field then click on the list button to the left



4. Click on the **+1** 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.



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

To Date

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.

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

Include Inactive

Select Patients

Provider(s)

Number of Copies

Printer

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

To Date

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.

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

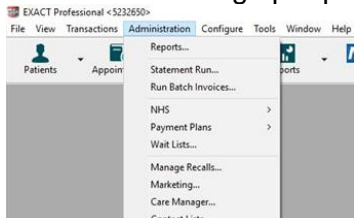
Cashing Up Report

Running the Cashing Up Report

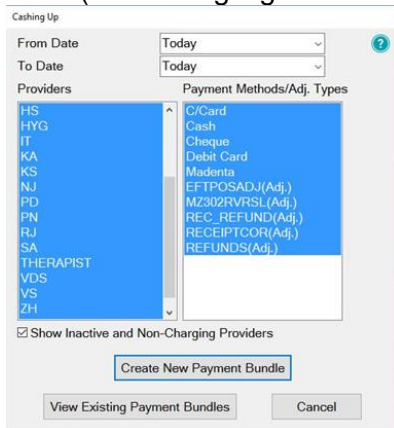
The 'Cashing Up' report is used to summarise all current payments received for the practice on a given day or for a date range. This report is run daily for all payments taken at the practice. It is not necessary to create a 'Cashing Up' slip for any payment method deposited directly into the Bank Account;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

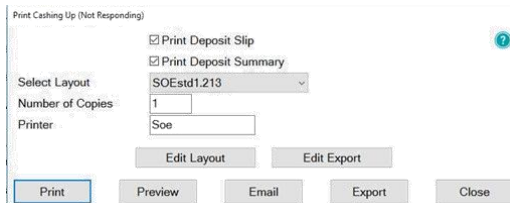
1. To run the cashing up report go to Administration > Reports



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)



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
4. Select the bundle with today's date from the list
5. Click on
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 **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 to 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	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 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	459
June 2012	452
July 2012	494
August 2012	501
September 2012	507

Detail:



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	<p>Failures: Patients who failed to be recalled, with no further planned recalls or appointment bookings.</p>	<p>"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.</p>
--	-----	--	---

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.

Performer ZH	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	0.00
Total for contract 5664700001 (UDA) effective 01-04-2014 - 31-03-2015			14099.00	14.00	0.00
--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
 to days from today

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 days

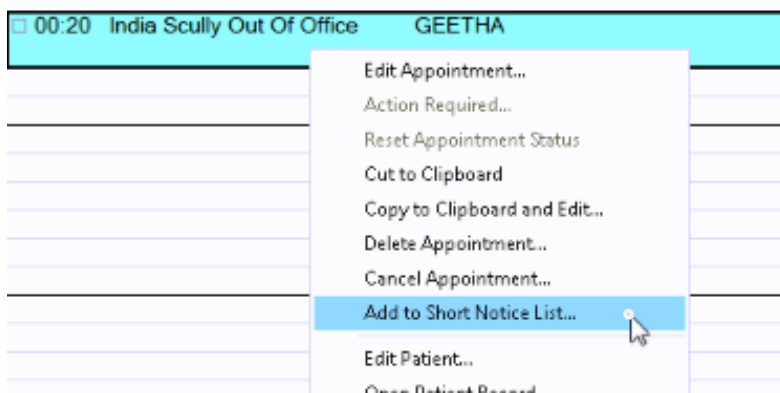
Remove cancelled and FTA appointments if they are not rebooked within weeks

Short Notice Period

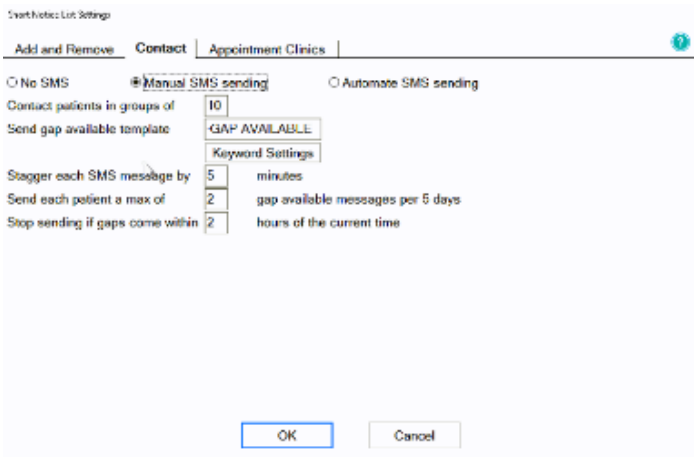
Identify gaps in the appointment book up to days ahead

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'

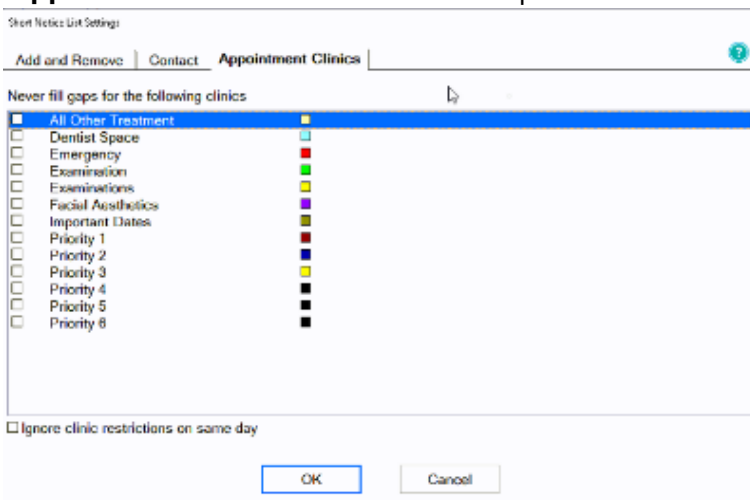


3. You can Tick/Untick box to add FTA appointments automatically.
4. You can also decide when to remove appointments from the Short Notice List by setting a time intervals in the two removal conditions shown above.
5. You will need to specify the short notice period itself. So the length of time from 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

PATIENT COMMUNICATIONS

Presentation Manager

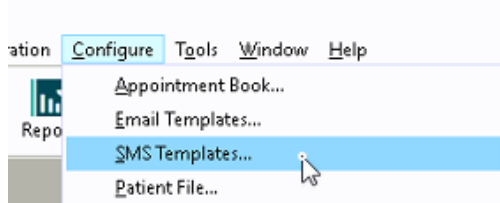
You can view a video guide using the link below:

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

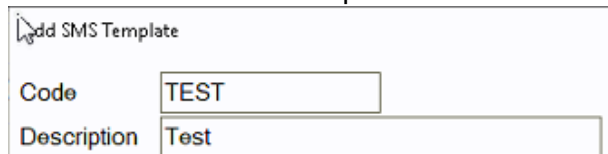
SMS


How to add SMS template

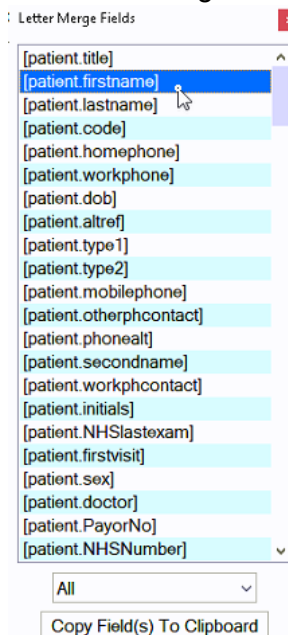
1. Go to Configure > SMS templates



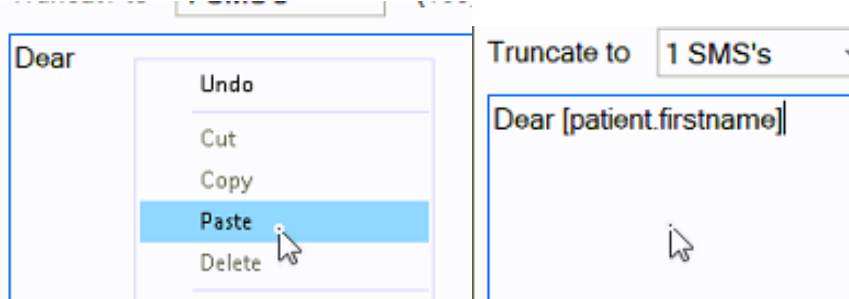
2. Click on  from the toolbar
3. Enter a code and a description. Please note: the code needs to be unique



4. Type your message into the available field.
5. To automatically pull information from the patient file click on  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'



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




- 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.

Truncate to (160) characters

- Once you have finished your template click

How to contact patients by SMS

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

- Select the email template from the list and then click on
- Click
- You will be shown a preview of your SMS – if you have not used a template you will need to type your SMS here
- Once you are finished click and the SMS will go to your patient. Any SMS sent will be stored in the 'Contacts' tab.

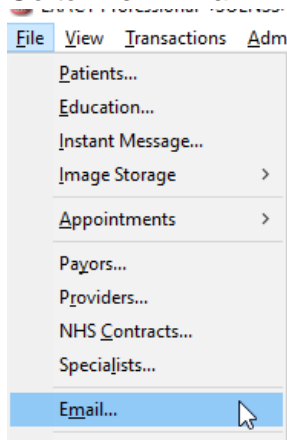
Email

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:

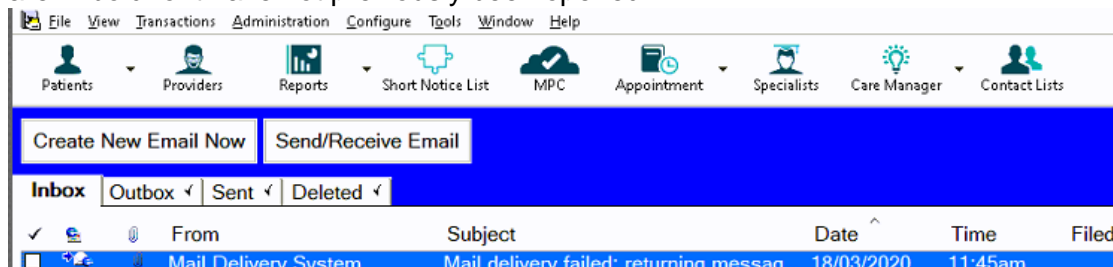
It is important to check your emails at least twice a day.

1. Go to File > Email



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
3. 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



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.

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'

- 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.

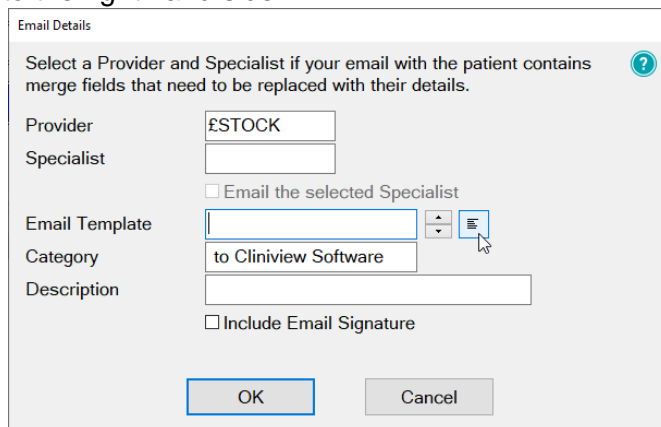
How to add email templates

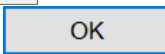
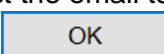
You can view a video guide using the link below:

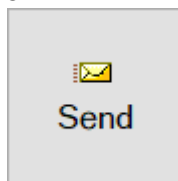
<https://www.youtube.com/watch?v=KgAX2dUrHU8>

How to contact patients by email

- Go to the patients file that you wish to email
- Click on the  icon on the patients toolbar
 - If you would like to free type your email please go to step 5
- On the 'Email Details' screen click into the 'Email Template field and then click on the list button to the right hand side

a. 

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



- 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 Practitioner 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