

EXACT RECEPTION GUIDE

England & Wales

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

+44 (0)845 345 5767

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



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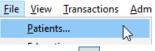


PATIENT INFORMATION

Adding Patients

From the Patients Window

1. Go to File > Patients



- 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.

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

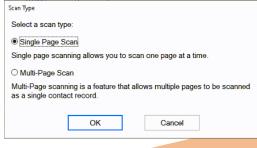
You can view a video guide using the link below:

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.

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 355 ~	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 button and select from your available categories.

Contact Information			
Date	19/10/2015		
Description			
Creator	CONV		
Category	SMS	<u>▲</u> ▼ ■	
	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.

	Break 1					50505	~
P	ayment	0	ekt	3	3	*	

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 occasic ok, the book will aut 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

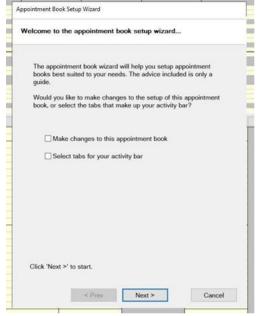
5.

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.

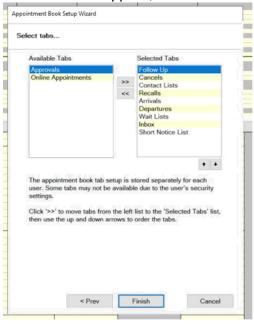




7. When you have pushed this the next window should appear with following options; (If these options are not available please login as an administrator)



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	5005005005	~
P	ayment	0	ekt	3	13	3	•

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

	Ma	ke changes t	o this appoin	tmer	nt book		
3.	Select	Next >	Next >	and	Next >	>	again
4.	You wil I. II.	window and cli Once they app book to can us appointment b	nn – click on th ck on the >> ear under sele e the + b ook. olumn – Click o	to n to n cted	oviders init nove them columns the s to adjus e provider	tials in n into hey il st the in the	8
		Provider will no	longer appear				book.
5.	Once y	ou are happy v	vith your chang	es se	elect	Finish	



Multiday Appointment Book

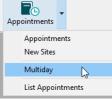
Opening the Multiday Appointment Book

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	ninistration	<u>C</u> onfigu	re	<u>W</u> indow	<u>H</u> elp	
	<u>P</u> atients <u>E</u> ducation Instant Message Image Storage	>	. Pa	atients	•	Report	l ,	Instant
	<u>Appointments</u>	>	Арро	intments				
	Payors		Hyg					
	Providers		Multi	day Appoi	intm	ient Book		
	NHS <u>C</u> ontracts Specia <u>l</u> ists		<u>L</u> ist A	ppointme	nts.			20

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

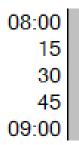
-6m -4w -1w	-1d Today	+1d +1w	+4w +6m
-------------	-----------	---------	---------

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>Transactions</u>	<u>A</u> dn	mini
		Patients			
		<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> ovid	ers		
		NHS C	ontracts	63	
2.	Click	on the	■ button besi	de the	ne code box
	Cod	e ~			
3.	Choos	se the p	rovider you wou	uld lik	ke to change the time interval for then selectοκ
4.	Click	onto the	Appointmer	its	tab
5.			een you can ad intment Length	,	the start and end time of the multiday appointment book ne Interval)
	Sin	gle C	olumn and	Mu	ultiday Book
	Α	ppoint	ment Book	Star	rt Time 07:30am
	Α	ppoint	ment Book	End	d Time 06:00pm
	Α	ppoint	ment Lengt	h	00:15
6.	Once	you hav	/e made your cl	nange	es 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 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.

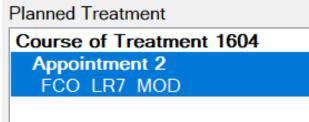
Last Name	~
Code	
Last Name	
Home Phone	63
Mobile Phone	
Alt. Reference	
DOB	
First Name	
Post Code	
NHS Number	
Also Known as	

- 3. Type in the patients last name into the field then click on the button
- 4. 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:

• • • 100:30 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 H	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.		n Reason' field then click on the button.
	Cancellation Reason	
3. 4. 5.	Enter any notes that you	Son from the list then select OK require hoose between five options:
0.	Cancel Appointment: Notes *Notes Wed 25/03/202	•
	5 Year Cancel the appointment and add it to Clipboard Short Notice Li	
		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.



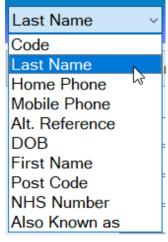
- V. Do Not Cancel Appointment this will leave the appointment in the diary.
- 6. Once you cancel the appointment in will no longer show in the appointment book on that date/time but you will see a line on the 'This patient's appointments' which shows the details of the appointment with the cancellation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

This patient's appointments

\$* 1	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	[®] 283
·	[°] 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 Arriv	ed
Mr Geoff Cooper	C_ C_ @_@
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 21/04/2015.	Matches the vertical ordering of forms below. Hover your cursor for a description.
FP17PR Check (tick)) Forms for sending to Clinipad
I Send an FP17PR to Clinipad Clieck (lick) FP17 required as the patient is probably starting an NHS course too	
Oral Health Survey	Simply click to print the form
Z Complete forms using MiniPad Select a Clinipad de	ovice from the dropdown menu
Arrive & Send to Clinipad Arrive	Cancel
ancels Contact Lists Arrivals Short Notice List Clinipad Follow	
Ar Wolverine Fullbellow 📮 iPad Mini	2 Minutes, 26 Seconds 🔁 Return
C C C C C C C C C C C C C C C C C C C	
Image: Antipage of the state of the sta	 ✓ 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 State 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



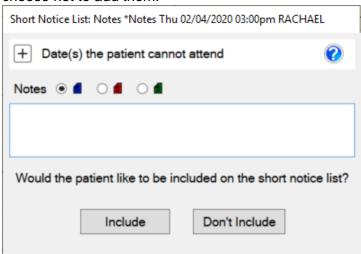
The To Depart bar will allow the receptionist to carry out the tasks needed before the patient leaves the surgery e.g. pay, rebook or collect any additional information.

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	RACHAEL
Date(s) the patient cannot attend	0
	+1
Notes 🖲 🔳 🔿 📾 🔿 📾	\mathbf{T}
Would the patient like to be included on the sho	t notice 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.

⊖ Single date	25 Mar 202	0 25 f	rom	4	to	÷ 🕐
O Date range	25 Mar 202	0 25 f	or	1 👻 days		
Same day(s) e	ach week					
🗹 Mondays	from	10:00 AM 🗘	to	12:00 PM 🗘		
Tuesdays	from	Å. V	to	÷		
Wednesda	ays from	Å V	to	Å		
Thursdays	from	Å V	to	¢		
Fridays	from	Å V	to	÷		
Saturdays	from	Å V	to	¢		
Sundays	from	Å V	to	÷		
		qĶ	_			

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



Short Notice List: Notes *Notes Thu 09/04/2020 02:3	0pm 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				
Once you are happy with the availation how as available on the Short Not	ability click on	Include and h	e patient will n	ow
Arrivals - Cancels - Follow Up - Short Notice I	List ·			
Patient Mr Notes "Notes	Appointment	30pm	Length 00:30	el Provider
	0	Best Suited Gaps for Mr N	12:30pm - RACHAEL -	

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.

	AU	MS	DU	
			***	- -
SMS P	Patients to Fill Gap: Thu 03:	00pm for 06:00 - BC	0	- -
having	able patients can be found to SMS contact details or patier he Short Notice List button to	ts reaching their maximum	contact limit. Please	
	Sh	ort Notice List		
		2	0	EX

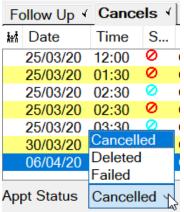


2. If you have patients that fit the criteria then you will be able to select send SMS and it will contact the patients that fit the appointment criteria on the Short Notice List.

Cancels List

Using the Cancels list

- 1. Click on the **Cancels** I 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	nent from the cancel list? (It will still be nt's history))
○ Remove the sele	cted appointment only	
Remove a range	of cancelled appointments	
From Date	3 months ago 🛛 🗸	
To Date	Today ~ 🖽	
(OK Cancel	
Select OK		



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

Removing cancelled appointments
Cancel

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	X
Collect Contact	Consent
Take payment:	£100.00

- 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 ~ *N	DTES N	ti dt	Paid By	Mr Notes "Notes
Date	07/10/2019		Туре	
Provider	INDIA			
Family Members	3			
Stock Items	-		1 1 ••	.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 ~	omment		
-	-	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 Accou	unt		
Date	Ð	=	a <u>e</u>	Num	COT	Provider	Particulars	Fee	Debit	Credit		Open Am	nt
07/10/2019	2		а	2905	1414	INDIA	Invoice		100.00				_
07/10/2019	<u>و</u>			1009		INDIA	Cash			200.00		-34.0	0
Key Non	Account	t Item	ns 🗆 R	esubmis	sions					207	View Dgtails	i A	
mine a	Account		ns ⊡ R	esubmis	sions				DOWN	LITELUIS .	Contractor incontraction	i A	
Current:	-34	00	ns 🗆 R		sions	-100.00	Stop Credit Aler	t		COT	View Dgtails	i A	
Current: 0+ Days:	-34. 0.	00		Due:	sions	- 100.00 0.00			Mrs I	otes Notes	-100.00	i A	
Key Non Current: IO+ Days: IO+ Days: IO+ Days: IO+ Days:	-34. 0.	00	Fotal (Due:	sions	100000000000000000000000000000000000000		Statement Run	Mrs I	otes Notes	-100.00	i A	1

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

	the transaction(s) to trans	sfer.	
Date	Provider	Num	Amount Open
07/10/2019	INDIA	1009	34.00
Amount	l₂ 34.00 Patient →	÷ E	Select All
Transfer to	Pratitional ~		



- 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

											Statemen	t Account			
Date	Ð	=	ъ	💁 Nu	um	COT	Provider	Particulars	Fee	Debit	Credit		(Open	Amt
07/10/2019	-		8	29	905	1414	INDIA	Invoice		00.00	1				
07/10/2019	0			10	009		INDIA	Cash		Alexandra -	200.00				
07/10/2019	40.			10	900		INDIA	Transfer to Mrs		34.00					
					4										
					HC.										
Key ONor	Accour	nt Iter	ns 🗆	-	000000	ms						COT View	Dgtails	i	A
		nt Iter 1.00	ns 🗆	-	000000	ons				11111	latas Mata			i	B
Surrent:	0	.00		-	ıbmissic	vns	-66.0	10 Stop Credit Alert)		iotes Note Notella No	5	Dgtails -66.00 -34.00	1	B
Key Nor Current: 30+ Days: 30+ Days:	0	.00. .00	Tota	Resul	ubmissio »:	wis	12,737	10 Stop Credit Alert	tatement Run	Mrs		5	-66.00	i	A
Surrent: 10+ Days: 10+ Days:	0 0 0	.00. .00	Tota	Resul	ubmissio »:	wis.	12,737			Mrs		5	-66.00	i	A
Current: I0+ Days:	0 0 0	00. 00.	Tota	Resul	ubmissio »:	ns	12,737	00 Don't Include in S		Mrs		5	-66.00	1	A

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 9
07/10/2019	Receipt	1009		INDIA	07/10/2019	-34.00
⊳		24.00				
Total allocati	ons.	-34.00				Details i
Total Open:		0.00				
Total Amount	t:	34.00				
Name		Mr Notes Notes	dd			
		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:

oose Credit, Refund or	r Correction Type	
○ Credit note		
Issue a credit note to future work.	the patient to use ag	ainst existing or
O Refund unused depos	it (Max 200.00)	
Return money to the p paid in advance for tre		
O Refund money paid fo	r work done	
Return money to the p The patient's balance will be discounted by	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

Instantions D^{e Notes Thirtes}

										Stateme	ent Account		
Date	Ð	25 1	2 6	Num	COT	Provider	Particulars	Fee	Debit	Credi	t	Open A	Amt
7/10/2019	Ð			2905	1414	INDIA	Invoice		100.00				
07/10/2019	¥.			1008		INDIA	Cash			100.0	0		
Key 🗆 Nor	Accourt	t Item	s 🗆 R	esubmiss	ions						COT View	w Dgtails 1	
Key Nor		t Item	s 🗆 R	esubmiss	ions							w Details 1	Э
	0	.00	s 🗆 R otal (ions	0.	00 □ Stop Credit Ale	ert		trans. Tu		w Dgtails 1	9
urrent: 0+ Days:	0 0	00 00 T	otal (Due:	ions		00 □Stop Credit Ale 00 □Don't Include in			1000-00		w Dgtails i	2
urrent: 0+ Days: 0+ Days:	0 0 0	.00	otal (Due:	ions			n Statement Ru	n	hinn "h		w Dgtails i	D
urrent:	0 0 0	00 00 T 00 p	otal (Due:	ions		00 Don't Include in	n Statement Ru	n s	ily Total:		ev Dgtails i	2

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

ase 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

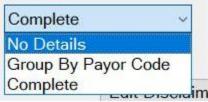
Transactions: Mr Notes *Notes

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

	B									Stateme	nt Account	
Date	B	28 B	Se Num	COT	Provider	Particula	rs	Fee	Debit	Credit		Open Amt
07/10/2019	۵		2905	1414	INDIA	Invoice		1	00.00			
07/10/2019	0		1008		INDIA	Cash				100.00)	
Key Non	n Account	t Items [] Resubmiss	ions							COT View	v D <u>e</u> tails i
Current:	0.0	00							100 No	ans Thu	100	0.00
		00 -	I Due:		0.	00 Stop	Credit Alert					CT CT CT
80+ Days:	0.0	ou lota	i Due.			an Don't	Include in (Statement Run				
					0	.00 Don't	include in a	statement run				
60+ Days:	0.0	00 Tota 00 Paye 00			0			ing Messages				
60+ Days:	0.0	00 Paye			0				Family	y Total:		0.00
30+ Days: 60+ Days: 90+ Days: Close <u>S</u> ta	0.0	00 Paye	or Due:	Adjust	0 Iransfer						esubmit	0.00

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 Current: 0.00 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											Statemen	it Account			
07/10/2019 ♥ 1008 INDIA Cash 100.00 Key □Non Account Items □ Resubmissions Uurrent: 0.00 30+ Days: 0.00 Total Due: 0.00 □Stop Credit Alert 30+ Days: 0.00 Payor Due: 0.00 □On't Include in Statement Run 30+ Days: 0.00 □No Statement Aging Messages	Date	8		2 9	Num	COT	Provider	Particulars	Fee	Debit	Credit		(Open A	mt
Key Non Account Items Resubmissions QOT View Dgtails i A Current: 0.00 000 Stop Credit Alert Image: Control of the contro	07/10/2019					1414				100.00					
Jurrent: 0.00 Jurrent: 0.00 Stop Credit Alert Million 60+ Days: 0.00 Payor Due: 0.00 Don't Include in Statement Run Include in Statement Aging Messages Include in Statement Aging Messages	07/10/2019	v			1008		INDIA	Cash			100.00				
N0+ Days: 0.00 Total Due: 0.00 Stop Credit Alert N0+ Days: 0.00 Payor Due: 0.00 Don't Include in Statement Run N0+ Days: 0.00 □No Statement Aging Messages															
0+ Days: 0.00 Total Due: 0.00 Stop Credit Alert 0+ Days: 0.00 Payor Due: 0.00 Don't Include in Statement Run 0+ Days: 0.00 Onon't Include Aging Messages Onon't Statement Aging Messages	Key Non	Account	Item	ns ⊡R	esubmis:	sions						COT View	Dgtails	1 2	1
00+ Days: 0.00 □No Statement Aging Messages				s ⊡R	esubmis:	sions						<u>COT</u> View	1	i 2	4 1
00+ Days: 0.00 □No Statement Aging Messages	Current:	0.0	00			sions	0.	00	ert			<u>C</u> OT View	1	i 2	4 8
Family Total: 0.00	Current: 0+ Days:	0.0	00	Total [Due:	sions						<u>C</u> OT View	1	i 2	4
	Current: 30+ Days: 30+ Days:	0.0 0.0 0.0	00 70 7	Total [Due:	sions		00 Don't Include in	n Statement Ru		and the second	<u>C</u> OT View	1	i 2	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	Ð		1487	INDIA	-34.00
27/03/19	5	D	1486	INDIA	-200.00
27/03/19	64 C-	<u>ت</u>	1487	INDIA	34.00
27/03/19	西		1488	INDIA	166.00
17/06/19	-	2	1488	INDIA	-166.00
07/10/19	西		2905	INDIA	100.00
07/10/19	0		1008	INDIA	-100.00
Select All	Sel	ect None		Total Sel	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

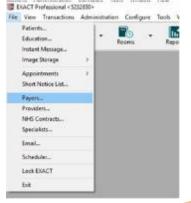
											Staten	ent Account		
0	Date	ð		a e	Num	COT	P. Plan	Provider	Particulars	Fee	Debit	Credit	Open Am	at
	06-11-2018	Ð	2		22924	126332		£STOCK	PPLANS Invoice	170.00				-
	06-11-2018	2	•		22926	126332		£STOCK	PPLANS Invoice		170.00			
	26-11-2018	0			6159			ESTOCK	Debit Card			100.00		
	04-12-2018	0					1008	£STOCK	HH		2250.00		2250.0	0
	06-12-2018	9-D			22926	126332		ESTOCK	Treatment Resub			170.00		
	06-12-2018	1			22928	126332		ESTOCK	PPLANS Invoice		170.00		70.0	0
Ke	Non Ar	sociant lite	me D	Res	hmission		d Items		COT View View Sto	itement Ac	touror	Datai	6 i 76 97	
	y 🗆 Non Ad					s 🗆 Delete			COT View View Sta	itement Ac	count	~ Detail	ls i 26 17	d
Cur	rent:	2320.00		Resu		s 🗆 Delete	d Items 2320.00		Contraction (Contraction		count		ls i 20.1 1	d
Cur			Tota		¢	s 🗆 Delete		2	Contraction (Contraction				Sea (Service and Sea	d
Cur 30+	rent:	2320.00	Tota Payo	l Due r Due	¢	s 🗆 Delete	2320.00	Stop Cr	Contraction (Contraction	Ndshdh			Sea (Service and Sea	d
Cur 30+ 60+	rent: Days:	2320.00 0.00	Tota Payo	l Due r Due	¢ :	s 🗆 Delete	2320.00 0.00	□ Stop Cr □ Don't In	edit Alert	Ndshdh			Sea (Service and Sea	d
Cur 30+ 60+	rent: Days: Days:	2320.00 0.00 0.00	Tota Payo	l Due r Due	¢ :	s 🗆 Delete	2320.00 0.00	□ Stop Cr □ Don't In	edit Alert clude in Statement Run	Ndshdh	Wolfsong	23	Sea (Service and Sea	d

- 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. Go to File – Payors or if you have one, the 'NHS' button along the top.





2. To the right of 'Sort by name/Sort by code', find NHS.



3. To the right of this screen, click on the button that says 'Claim'.

		Fee Schedule	
		Adjust Fees	
.00	<	Claim	D
VHS England	*	Transmit Claims	
20.00%		Transmit Setup	
	- 1	PDS Setup	
		Bands Setup	
]	Demplan Setup	
01-08-2003	390.00	372.00 ^	
01-05-2004	390.00	378.00	
01-04-2005	390.00	384.00	
		dt +1 12 ds	

4. On the next screen, select the providers you wish to bundle claims for, leave blank for all providers, or select multiple to the right. The date field is set to todays date, so it will bundle everything up to today. Click 'OK'.

Provider(s)		÷ •	Multiple
Date to	31-08-2018		
1	ОК	Cancel	

5. The system will bundle the claims, and once finished, will prompt you to print the list of claims, press print if you would like to print, or cancel to skip this.

Number of Copies	1		0
Printer	Soe		
	Edit L	ayout	
	Preview	Email	Close

- 6. If you get a message saying 'No Claims Found', nothing is ready to send, and if you get a message saying 'There are too many claims for the bundle...', once finished, you will need to press the 'Claim' button and bundle again, to bundle these extra claims ready to transmit.
- 7. You will then get the 'Transmit Claim' screen click ok, the transmission is complete.

Transmit C	laims	
From	31-07-2018]
То	31-08-2018]
C	Ж	Cancel

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
Claim Bundles
Courses of Treatment
Earnings Summary
Lapse List
Lapse Letters
NHS/Private Warnings
UDA Manager
Set Default

Dealing with NHS Responses

Response		EXACT		
125	Unacceptable combination of treatments on a claim			
	Reg 11 with Band 1, 2 or Urgent	1. Resubmit the COT		
		Copy the banded treatment and the reg 11 onto two new		
	More than one of the following	COTS		
	entered on the same FP17O claim:	TC the original COT as a deletion		
	 Assess and review 	4. Wait 48 hours		
	 Assess and refuse 	5. Transmit the two new COTS.		
	 Assess appliance fitted 			
	 Treatment abandoned - 			
	patient failed to return			
	 Treatment abandoned – 			
	patient requested			
	 Treatment discontinued 			
	- Treatment continued			
	- Repair to appliance			
	- Reg 11			
	NICE guidance recall interval present	1. For UOA resubmit the COT		
	/ Treatment on Referral indicator	TC the new COT and remove the indicators from the		
	present	FP17		
128	Invalid quantity associated with treatment code			
	Zero recall interval or value greater than 24	Call dental board 0300 330 1348		
	months recorded against NICE guidance			
	Invalid value submitted for Ethnic	 Resubmit the COT with the wrong code 		
	Origin	TC the new COT, ensuring the ethnicity is entered on		
		the FP17		
		Transmit the claim(s) to the Board. We would recommend		
		calling the Dental Board about an hour after transmission,		
		on 0300 330 1348, to check the claims have been received		
		and the ethnicity code is correct.		
		You will need to provide the Dental Board with the claim		
		bundle number and the practice postcode		
312	No significant treatment on a claim			
		1. Resubmit the COT		
		2. Add the banded treatment (you may get this response if		
		you mark urgent treatment as a continuation - in that		
		EXACT		

be paid for both courses. If new sites get this response it is usually because they have sent the claim off in both systems. Get the site to check the old system and if there is one there. Resubmit the COT and TC again as a deletion. Site will be paid for the one in the old software. FP17 submitted that contains duplicate patient and duplicate details to a FP17 that has already been processed. 1. Resubmit the COT 869 Further treatment within 2 months Invalid. If there are more than two months between courses of treatment, remove the further treatment indicator. If the dates are incorrect, amend them. 1. Resubmit COT 3. Cick exemptions box on the new COT and remove the ohcek in further treatment to a new COT and remove the check in further treatment. 1. Resubmit COT The previous course of treatment is a lower band than the further treatment If the original COT is a band 1 the new COT cannot be marked as a continuation of treatment check on the exemptions box on the new COT has a higher band. The original course of treatment was urgent If original should be urgent: 1. Resubmit the COT Resubmit the COT 2. Resubmit the new COT Resubmit the new COT 3. TC the COT Remove the continuation of treatment check on the exemptions window 3. TC the COT Remove the continuation of treatment from the exemptions window. 3. TC the COT Remove the check in continuation of treatment from the exemptions window. 3. TC the COT Re			case you will need to remove the check in continuation of treatment on the exemption screen) 3. TC the COT
If new sites get this response it is usually because they have sent the claim off in both systems. Get the site to check the old system and if there is one there. Resubmit the COT and TC again as a deletion. Site will be paid for the one in the old software. FP17 submitted that contains duplicate patient and duplicate details to a FP17 that has already been processed. 869 Further treatment within 2 months Invalid. If there are more than two months between courses of treatment, remove the further treatment indicator. If the dates are incorrect, amend them. 1. Resubmit COT 2. Corport to a new COT ensuring the dates are correct 3. TC the COT 3. Corport to a new COT ensuring the dates are correct 3. Click exemptions box on the new COT and remove the check in further treatment. 4. TC the COT 3. Click exemptions box on the new COT cannot be marked as a continuation if the new COT cannot be marked as a continuation of treatment check on the exemptions window 3. TC the COT 3. The original course of treatment was urgent 4. Resubmit the COT 5. Remove the continuation of treatment from the exemptions window 3. TC the COT 4. Resubmit the new COT 5. Remove the check in continuation of treatment from the exemptions window. 3. TC the COT 4. Resubmit the new COT 5. Remove the check in continuation of treatment from the exemptions window. 3. TC the COT 4. Resubmit the original COT (if this COT is outside of the 2 month window call the board as it may remove UDA's from you) 5. Resubmit the COT making use it is not an urgent code and shows the correct UDA's 4. Wait 44 hours 5. Charge through the newer COT with the continuation of	401	FP17 submitted that contains overlapping dates with an FP17 that has already been	Go to the patients transactions (£ button) and check the date of the last FP17. If the dates of the new COT and the last do not overlap, then Also check in the Chart History that there is not already a Course of Treatment that has been created on the same day with the same treatment. If the courses do overlap, contact the board as you may not
 and duplicate details to a FP17 that has already been processed. 2. Correct the planned and completed dates on the services 3. TC the COT 2. Correct the planned and completed dates on the services 3. TC the COT 2. Correct the planned and completed dates on the services 3. TC the COT 4. Resubmit the new COT and remove the check in further treatment. 4. TC the COT 4. The previous course of treatment is a lower band than the further treatment 4. TC the COT 4. The previous course of treatment was urgent 4. The original course of treatment was urgent 4. Resubmit the COT 4. Resubmit the COT 5. Remove the continuation of treatment from the exemptions window 3. TC the COT 4. Resubmit the new COT 5. Charge through the newer COT with the continuation of the continuation of the original course of the continuation of the response was received on. 4. The original COT should not be urgent: 5. Charge through the newer COT with the continuation of the continuation of the continuation of the original course of the continuation of the continuation of the continuation of the continuation of the previous window 4. The COT 5. Charge through the newer COT with the continuation of the conti		Get the site to check th	y because they have sent the claim off in both systems. e old system and if there is one there.
If there are more than two months between courses of treatment, remove the further treatment indicator. If the dates are incorrect, amend them. 1. Resubmit COT The previous course of treatment is a lower band than the further treatment 3. Click exemptions box on the new COT and remove the check in further treatment. The previous course of treatment is a lower band than the further treatment If the original COT is a band 1 the new COT cannot be marked as a continuation if the new COT has a higher band. The original course of treatment was urgent If enorginal COT is a band 1 the new COT cannot be marked as a continuation of treatment check on the exemptions window The original course of treatment was urgent If original should be urgent: Nesubmit the COT Remove the check in continuation of treatment from the exemptions window. The original course of treatment was urgent If de original COT should be urgent: 1. Resubmit the original COT should not be urgent: 1. Resubmit the original COT (if this COT is outside of the 2 month window call the board as it may remove UDA's from you) 2. Resubmit the COT making sure it is not an urgent code and shows the correct UDA's 3. TC the criginal COT making sure it is not an urgent code and shows the correct UDA's		and duplicate details to a FP17 that has	Correct the planned and completed dates on the services
band than the further treatment marked as a continuation if the new COT has a higher band. 1. Resubmit the COT 2. Remove the continuation of treatment check on the exemptions window 3. TC the COT If original should be urgent: 1. Resubmit the new COT 2. Remove the check in continuation of treatment from the exemptions window. 3. TC the COT 1. Resubmit the new COT 2. Remove the check in continuation of treatment from the exemptions window. 3. TC the COT 3. TC the COT 1. Resubmit the original COT should not be urgent: 1. Resubmit the original COT should not be urgent: 1. Resubmit the original COT (if this COT is outside of the 2 month window call the board as it may remove UDA's from you) 2. Resubmit the COT the response was received on. 3. TC the original COT making sure it is not an urgent code and shows the correct UDA's 4. Wait 48 hours 5. Charge through the newer COT with the continuation of	869	If there are more than two months between courses of treatment, remove the further treatment indicator. If the dates are incorrect,	 Resubmit COT Copy the treatment to a new COT ensuring the dates are correct Click exemptions box on the new COT and remove the check in further treatment.
exemptions window 3. TC the COT The original course of treatment was urgent If original should be urgent: 1. Resubmit the new COT 2. Remove the check in continuation of treatment from the exemptions window. 3. TC the COT If the original COT should not be urgent: 1. Resubmit the original COT (if this COT is outside of the 2 month window call the board as it may remove UDA's from you) 2. Resubmit the COT the response was received on. 3. TC the original COT making sure it is not an urgent code and shows the correct UDA's 4. Wait 48 hours 5. Charge through the newer COT with the continuation of		•	marked as a continuation if the new COT has a higher band. 1. Resubmit the COT
 Resubmit the new COT Remove the check in continuation of treatment from the exemptions window. TC the COT If the original COT should not be urgent: Resubmit the original COT (if this COT is outside of the 2 month window call the board as it may remove UDA's from you) Resubmit the COT the response was received on. TC the original COT making sure it is not an urgent code and shows the correct UDA's Wait 48 hours Charge through the newer COT with the continuation of 			exemptions window 3. TC the COT
 Resubmit the original COT (if this COT is outside of the 2 month window call the board as it may remove UDA's from you) Resubmit the COT the response was received on. TC the original COT making sure it is not an urgent code and shows the correct UDA's Wait 48 hours Charge through the newer COT with the continuation of 		The original course of treatment was urgent	 Resubmit the new COT Remove the check in continuation of treatment from the exemptions window. TC the COT
			 Resubmit the original COT (if this COT is outside of the 2 month window call the board as it may remove UDA's from you) Resubmit the COT the response was received on. TC the original COT making sure it is not an urgent code and shows the correct UDA's



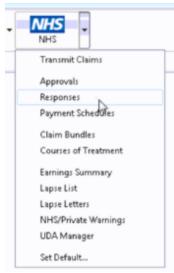
870	Free repair/replacement within 12 months inv	
	The date of acceptance is more than 12 months after the date of completion of the previous course of treatment	 Resubmit the COT Remove the free replacement check on the service (this will now have a patient charge) TC the new COT
	Treatment band 2, 3 or urgent are not selected on the FP17	Dentures, bridges or orthodontic appliances are not available for free repair or replacement if lost or broken.
		 (Free repair is only available for fillings, root fillings, inlays, porcelain veneers or crowns. This will not normally apply if: within the 12-month period another dentist has carried out any treatment on the same tooth that has been restored, or the patient was advised at the time of the restoration that it was temporary or a different restoration was more appropriate, but the patient insisted on a different form of restoration, or the repair or restoration is a result of trauma)
	The FP17 with free repair/replacement contains a higher band than the original FP17	A free repair can only be selected for the same service on the same tooth e.g a bridge cannot be marked as a free repair for a filling.
		The claim will need to be resubmitted and the free repair/replacement removed from the exemptions. Follow steps above.
@012	Invalid or missing contract number and / or performant of the second sec	Check the location is correct and the contract number is correct in the drop down on the FP17 If the contract number is correct in Exact you will need to contact the board.
		If the contract number is wrong because you have multiple contacts at the practice
		 Resubmit the COT TC the COT making sure the correct contract is on the FP17.
	The six digit performer number is incorrect	 Go to File-> Providers Bring up the provider in question and click on NHS details tab Check that the performer number is correct. If it is correct or you are not sure of the number, call the board and ask why this was sent. If the number is wrong, change the performer number then: a) Resubmit the COT b) TC the COT.
@212	Claim already present based on claim reference	
		If the treatment has been charted on a resubmitted COT that has been resubmitted copy all the treatment onto a new COT and TC.
	3	

		(If the original should not have been claimed for send as a deletion and put treatment onto a new COT wait 48 hours and TC again)
@285	Treatment dates are outside the period of the co	ontract or the performer's tenure If the dates are already correct contact the board on 0300 3301348 1. Resubmit the COT 2. Amend the dates to ensure they are correct or change the contract that has been put on the FP17 3. TC the COT
@307	Invalid Location ID	
		 Check the location number in Exact (configure > practice information) is incorrect make the change (this number needs to be 6 digits – f your location number is shorter add the required amount of 0's in front e.g. 1234 becomes 001234. Confirm with the DPB/PCT the claim numbers needed to Resubmit the COTs TC the COT again.
@320	No band on a further treatment claim	
		 Resubmit the COT Double click on the service and ensure there is a band – if there is not you will need to give the service a band or chose a service with a payor code. TC the treatment again. If this should not be further treatment e.g if it is urgent you will need to remove the further treatment option on the exemptions screen
@329	KPI treatment codes on a claim for non-PDS PI	
		 Call the board on 0300 330 1348 to confirm the correct contract them 1. Resubmit the COT 2. Copy the treatment to a new COT number 3. TC the original COT as a deletion 4. Wait 48 hours 5. Transmit the new COT
@330	SQ Ind claim where original cannot be found	
		 Resubmit the COT Copy treatment to a new COT ensuring the dates are correct TC the original COT ensuring there is a tick in the delete claim box Wait 48 hours then TC the new COT ensuring the invoice date is correct (set user settings to prompt for date when charging)
@331	SQ Ind claim where original has already been d	eleted or is in error
		 Resubmit the COT Copy treatment to a new COT ensuring the dates are correct TC the original COT ensuring there is a tick in the delete claim box Wait 48 hours then TC the new COT ensuring the invoice date is correct (set user settings to prompt for date when charging)



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;

13/02/13	05/11/12	b	123609	92	SA	Master Dluth Lendleland
		Response	Code: @21	2CLAIM	ALREADY R	ECEIVED. IF YOU
		WISH OR	IGINAL TO I	BE DELE	ETED AND T	TH IS CLAIM
		SUBSTITU	JTED, PLEA	ASE RET	RANSMIT W	ITH OBSERVATIONS.
		OTHERW	ISE PLEAS	E DO N	OT RETRAN	SMIT.

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

Resubmit	Resolve	Notes	FP17	3	Ì
----------	---------	-------	------	---	---

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;

You can turn this on by going to configure > user settings then making sure there is a Prompt for date when charging which shows under the chart section on

tick in the left hand side.



USER SETTINGS

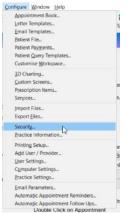
Adjusting Security

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	
Password	******
Security Group	SUPER
	Inactive

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



 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

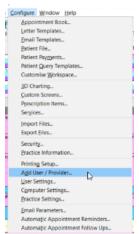


5. You can then click in these subsections and amend the security settings for that group.

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

People - Security

- 4. Click Next > and the next screen will want you to select the security group that the provider requires and add in a temporary password for them to just get logged in (make sure you tick "User must change password at next login"
- 5. Press Next> and the next page will be for any additional details you wish to add such a

Enter the security	settings for this	s user l	below	
The security grou access to. Which				EXACT a user has er belong to?
Security Group	DENTIST	÷	Б.	
Choose from belo	w to implement	your pa	asswor	d policy
				- F
User must ch	hange password	at nex	Rogin	
User must cl		l at nex	Rogin	
	ge password	l at nex	Rogin	
Cannot chan	ge password ver expires	-		days
Cannot chan	ge password wer expires nge password e	very 3	5	days

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

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

 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.

lota Length (Weeks)	1 ~			
Start Date	18/02/2	2020	~ Tue	
Extend to	18/02/2	2024	~ Sun	
Week 1				
Starting: Works On:	Day Start	Day End	Lunch	Length
Mon	08:00am	05:00pm	01:00pm	01:00
18/02/2020 I 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	terrestation and the second second	-		Territoria de la companya de la comp
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.
- 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 a	and description of this report	
Name	Allocated Payments	
Description	Use To Pay Performers	
Group on Favour	ite Reports	
Check Monthly		^
Weekly		
		~
		dd +1 🗊
		38



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 🕜
From	Start of last month ~	
То	End of last month	
	Simple Summary	
	O Summarise by Patient's Dentist	
	O Summarise by Who Got Paid	
	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	esta	on 8	s F						Sı	ırg	jeo	on	s	
Product On Product Dy Provident Dy Provident Dy Francisco To Darks Granitation Use Roster Darky Tairton Weektly So Elizabetha So	By Po	annen L		14/11/200 (20540) AE/Provide 14/11/200 14/11/200 X X	8/10 25											
Date De	nya	Pts. Seen	Hours Avel.	- Unbook Hrs.	н., г	Ertra Hrs.	Hours Us Worked			Hrs.	Vel	Pts	Hrs.	Val.	Pit.	
14/11/05 AF DERO ACS RGP UN Sub Totals		00000	97.00 24.00 97.30 39.20 24.00 68.50	00 20 20 00 00 20 00 20 20 20 45:00	9015 9010 9017 757 914 944	00:00 07:00 00:00 00:00 00:00 00:00	00 00 90 00 90 00 90 00 90 00 90 00 66 95	00 00 00 00 00 00 00		00.40 00.00 01.00 01.40 00.30 03.50	0.00 0.00 0.00 0.00 0.00 0.00		(0.00 (0.00 (0.00 (0.00 (0.00 (0.00	0.00 0.00 0.00 0.00 0.00 0.00		0.00 0.00 0.00 0.00 0.00
							-Ex00	1 Report	é,							- 12

1. Leave the **Provider(s)** field blank to summarise the Appointments for the whole practice.

An individual provider can be selected from a list by using either the 🖶 button or the 🔳 button.

- 2. Clicking the Multiple button will allow a combination of providers to be selected.
- 3. The 'From' and 'To' Date fields are used to define the date range for the report.
- 4. Other fields / options:



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

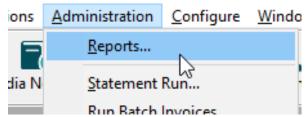
The report includes the following:

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

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

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

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



Add Query Template				
Description	FTA List			
				 E4 E2 ed
() ● And ○ Or				<u>G</u> ≁ E⊅ eio
		ОК	Cancel	

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

Select Condition	
Dentist appointment	^
Dentist recall	
Dentist recall period	
Dentist recall service	
Dentist recalls sent	
Don't include in statement run	
Entry in 'CHI Number'	
Failed appointment	
First visit	
Hygiene recall	
Hygiene recall period	
Hygiene recall service	
Hygiene recalls sent	
Hygienist	
Hygienist appointment	
Inactive type	
Lapse date	
Last appointment	
Last dentist recall sent	~
0	_
OK Cancel	

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 ~ Pro	mpt for entries
Failed appointment:	
From Date	25/03/2020 ~
To Date	25/03/2020 ~
Treatment Codes	
Provider	
Tip: You can specify multiple codes by so of codes by placing ' <to>' between two Tip: You can leave the Provider blank 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	* E	
Provider(s)		Multiple	
Number of Copies	1		
Printer	Printer		
Print	Preview Email	Export	Close

OK

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

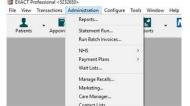
When you run this list again skip steps 4 – 7.

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)

From Date	Today ~	
To Date	Today ~	
Providers	Payment Methods/Adj. Types	
HS HYG TT KA KS PD PD PN RJ SA THERAPIST VDS VS ZH	 C/Card Cash Cheque Debit Card Madenta EFTPOSADJ(Adj.) MZ302RVRSL(Adj.) REC_REFUND(Adj.) REC_REFUND(Adj.) REFUNDS(Adj.) 	
	d Non-Charging Providers Create New Payment Bundle	
View Existing	Payment Bundles Cancel	



- 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 Dep	osit Slip osit Summary		0
Select Layout	SOEstd1.21			
Number of Copies	1			
Printer	Soe			
	Edit Layo	eut E	dit Export	
Print	Preview	Email	Export	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

File View	Transactions	Administration	Configure	Tools	Window	Help
1	5	Reports				
Patients	Appoin	Statement Run Batch			ports	
		NHS		>		
		Payment P	lans	>		
		Wait Lists				
		Manage Re	calls			
		Marketing.				
		Care Mana	ger			
		Contact Lis	te			

- 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 $\boxed{\mathscr{A}}$ **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.

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

B . 10	• 10 •	reservices inter	ACT Manager In	-		tang tana
4.0	Patiente	1star Hacarts	Durind	Hyperied	Effectiveness	
et #109 2011	246	255	155	100	NAME AND ADDRESS OF TAXABLE PARTY.	
lanth 2011	420	435	215	198	States	
erii 2011	451	400	242	218		
far 2011	481	508	295	213		
lano 2011	413	424	258	104	the second se	
Mr 2011	462	425	266	195		
kopari 2011	.440	453	248	205		
Heplember 2011	461	421	278	183	No All	
Actiober 2011	453	464	272	102	Co far fard f	
iovember 2011	467	103	341	202	and a second sec	
ecenter 2011	414	434	352	172	Investigation and Investigation	
lansory 2012	482	454	247	207	And a second sec	
whiteway 2012	502	548	335	212	and the second se	_
farch 2012	467	510	317	193		
crit2912	403	504	368	198		
far 2012	454	432	260	203		
ane 2012	452	155	308	156		
My 2012	493	510	326	184		
stant 2012	247	518	395	191		
Rotempor 2012	567	517	341	1.78		
icksbar 2012	467	402	319	163		
iorembe: 2012	460	478	304	128		
400012 w 2012	128	541	363	161		
arkury 2013	187	381	342	38		_
struary 2013	348	347	343			
Geuth 2013	182	313	350	1		
0102319	185	1994	363			
fav 2013	185	308	384			
and 2013	415	420	416			
uly 2013	182	152	181	1	the second se	
opent 2013	0	0	9	0		
eptember 2013	0	6	8	0		
Adam 2015	0	0	0	0		
ionomber 2013	- 10	-0	-10	0		
wowniter 2015		1	1			
and a set of the						

By default the current month is identified in bold:

May 2012	400
June 2012	452
July 2012	494
August 2012	501
Sontombor 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	Ecoked: 0
February 2012	532	548	335	213	Entered 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	Barren 1. 1. 2014
September 2011	461	471	278	78 193 July 2011	July 2011 ■ Inactive: 2
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 future who do not have appointments.	Still good. Patients remain as likely revenue for the future.
Light blue	Completed: Patients who completed treatment.	Indicates work done.
Dark blue	Moved On: Patients with appointments that have been postponed.	Okay. "The appointment did not happen, but we haven't lost them yet; they are still in the system."
Grey	Inactive: patients who are permanently lost to the Practice.	Lost - there will be no further business from these patients.
Dark red	Do not recall: whether due to a patient decision or a Provider decision.	Not lost just yet. We will not recall them, but these patients may still choose to come back for further treatment.
Red	Failures: Patients who failed to be recalled, with no further planned recalls or appointment bookings.	"The life blood of the Practice draining away". These patients were allowed to walk away. NOTE: The Recall Display should not show much red. If the Practice hasn't seen patients for a few years, or if they are otherwise lost to the Practice, they should either be de-activated (grey status), or the Practice should have a marketing drive to bring them back; they should not be left at "red" status.

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

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.

ate From	Days	Target	Claimed	Confirmed
1-04-14	30	141.51	0.00	0.00
1-05-14	31	113.21	0.00	0.00
1-08-14	30	113.21	0.00	0.00
1-07-14	31	141.51	0.00	0.00
1-08-14	31	113.21	0.00	0.00
1-09-14	30	141.51	0.00	0.00
1-10-14	31	113.21	0.00	0.00
1-11-14	30	113.21	0.00	0.00
1-12-14	31	141.51	0.00	0.00
1-01-15	31	113.21	0.00	0.00
1-02-15	28	113.21	0.00	0.00
1-03-15	31	141.51	0.00	0.00
otal for Performer ZH	365	1500.00	0.00	0.0
otal for contract 5664700001 (UE	DA) effective 01-04-2014 - 31-03-2015	14099.00	14.00	0.0

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	0
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 v 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 Offic	e 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	R.	
	Edit Patient	13	

- 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 Manual SI	MS sending O 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 Cancel	

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.

Sken Netics List Settings Add and Remove Contact Appointment CI	inics 🧕
Never fill gaps for the following clinics All Other Treatment Dentist Space Emergency Examinations Facial Asythetics Important Dates Priority 2 Priority 4 Priority 5 Priority 6	
Ignore clinic restrictions on same day	Carool

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

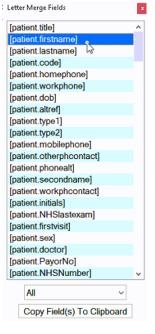
1. Go to Configure > SMS templates



- 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'

	Truncate to 1 SMS's v
Undo	
Cut	Dear [patient.firstname]
Сору	
Paste	i N
Delete 13	43
	Cut Copy 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.

OK

- Truncate to 1 SMS's ~ (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 site 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
- 6. 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.

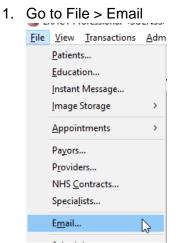


Email

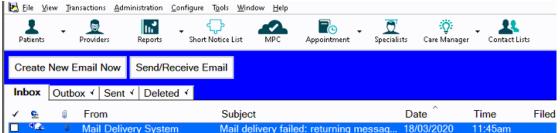
Checking Inbox/Outbox

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	^
	eit +1 3
	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'

Address from this email:		
File to patient		
Patient's existing Email Address		~ ~
	eit +1 🗄	5
	Add this address to patient's email addresses	
File to specialist Contact Information Description	Accessing SOE Connect	_
	Accessing SOE Connect	



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 stients 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

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 01364 266 800

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

Contact NHS Switchboard on 0113 825 0000

NHS Local Area Teams

Primary care providers and other NHS organisations can find regional contact details by accessing the link below:

https://www.england.nhs.uk/about/regional-area-teams/

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

