EXACT CLINICAL USERS GUIDE

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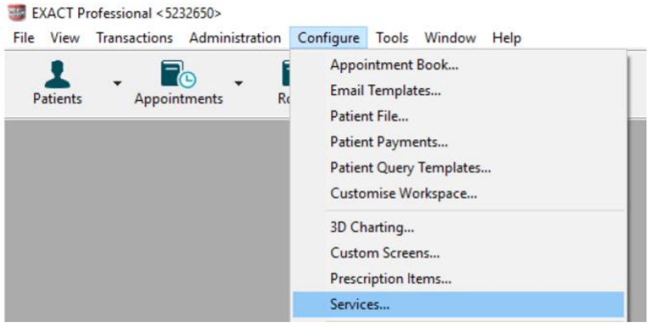
CONFIGURATION

Services

Please note for any of these changes you may need to be logged in as a SUPER user or an Administrator.

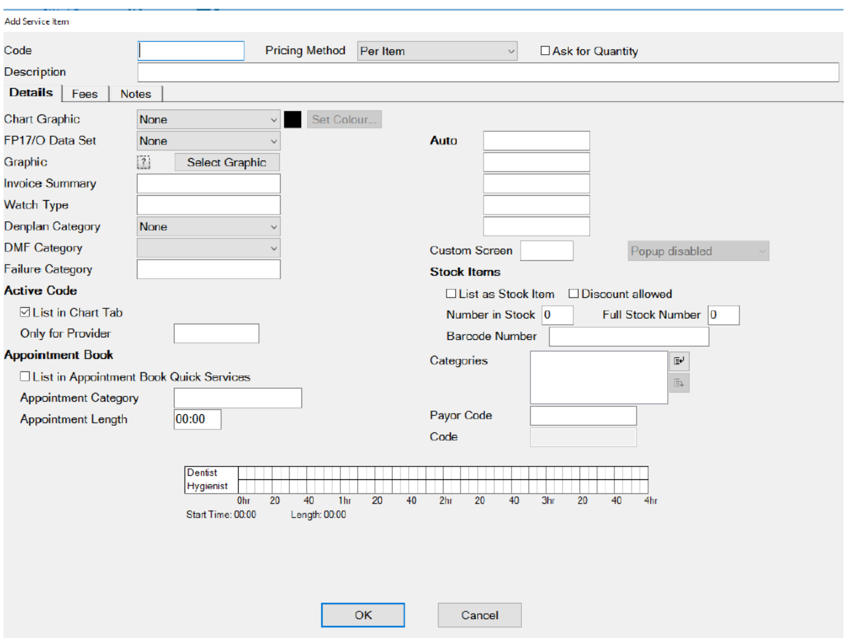
Adding Services

1. From the ‘Configure’ menu, select ‘Services’.

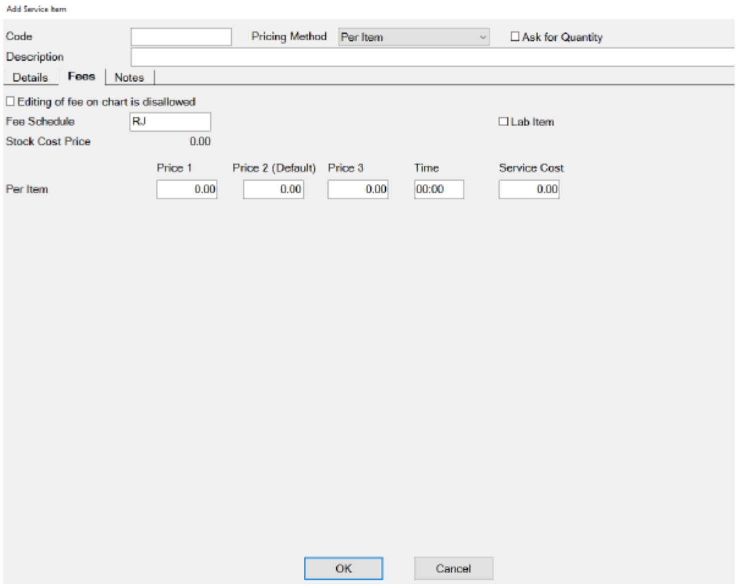


2. At the bottom right hand corner of the screen click on the 

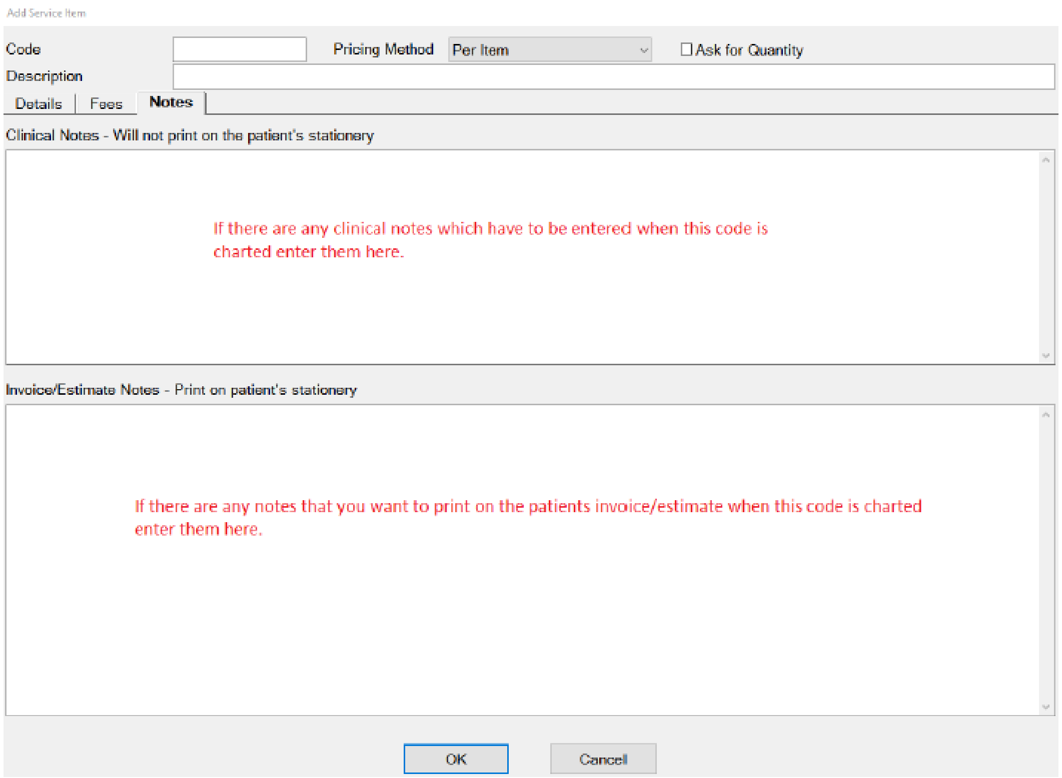
3. This will bring up the ‘Add service item’ screen. Enter a code for the new service
   Please note you can only use a code if it is not already present in the system.



4. Enter a description and select the Pricing Method. If applicable, tick the ‘Ask for Quantity’ box.
5. Configure the Details Tab information as necessary, i.e. selecting the price code, graphic and colour for the service and add it to any required category. These options control what the service will look like and how it will function.
6. Next click on the ‘Fees’ tab and enter the pricing information as appropriate.
   Enter the price in ‘Price 2 (Default)’ field as this is where the default fee schedule picks up the prices for charting.



7. If required, click on the ‘Notes’ tab to enter ‘Clinical Notes’ or ‘Invoice/Estimate’ notes for this service.
Please note that this will show for all patients the service is charted for – you can still edit the invoice/estimate and clinical notes on the chart tab.



8. Press the 

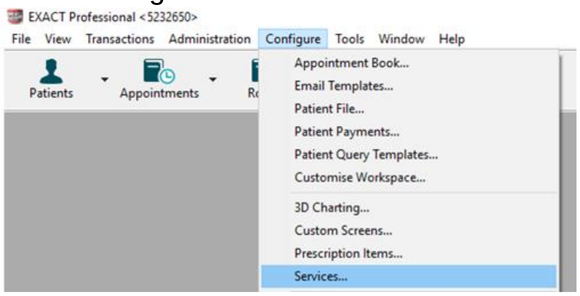
button to create the new service. This will return you to the ‘List Service Items’ screen.

You can also view a helpful video on adding services using the link below:

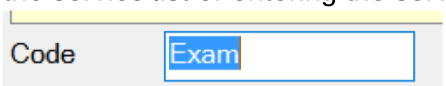
https://www.youtube.com/watch?v=C7zP0_6qPgI

Amending Service Fees

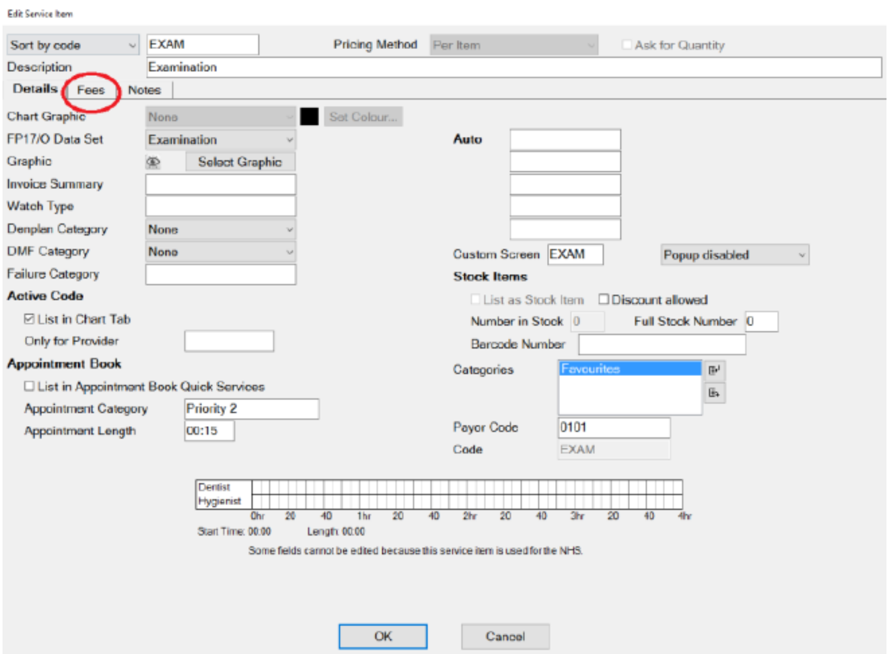
1. Go to Configure > Services



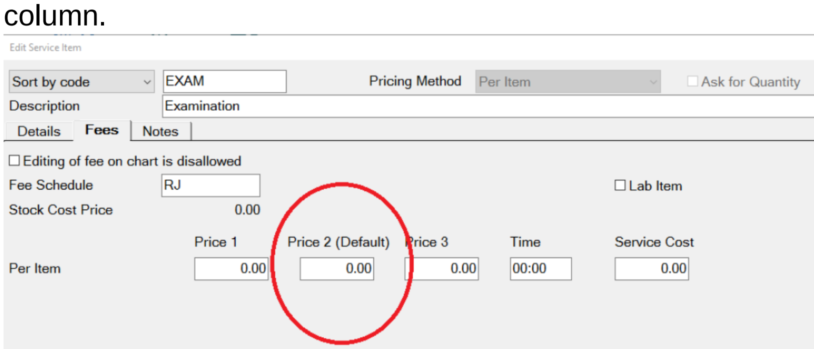
2. Locate the service you wish to change the fee of – you can do this by scrolling through the service list or entering the services code into the bottom left hand corner



3. Double click on the service and it will open the 'Edit Service Item' screen.
4. Click on the 'Fees' tab



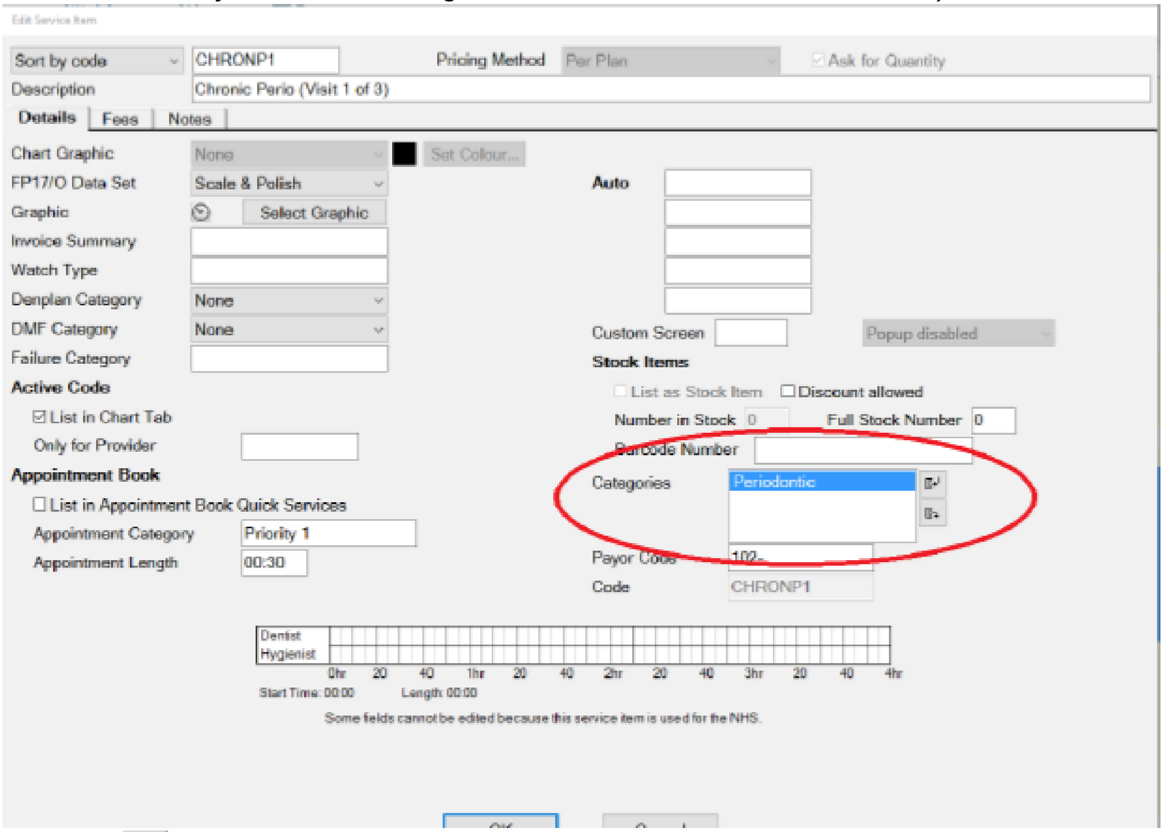
5. From this screen you can change the price of the service in the 'Price 2 (Default) column.



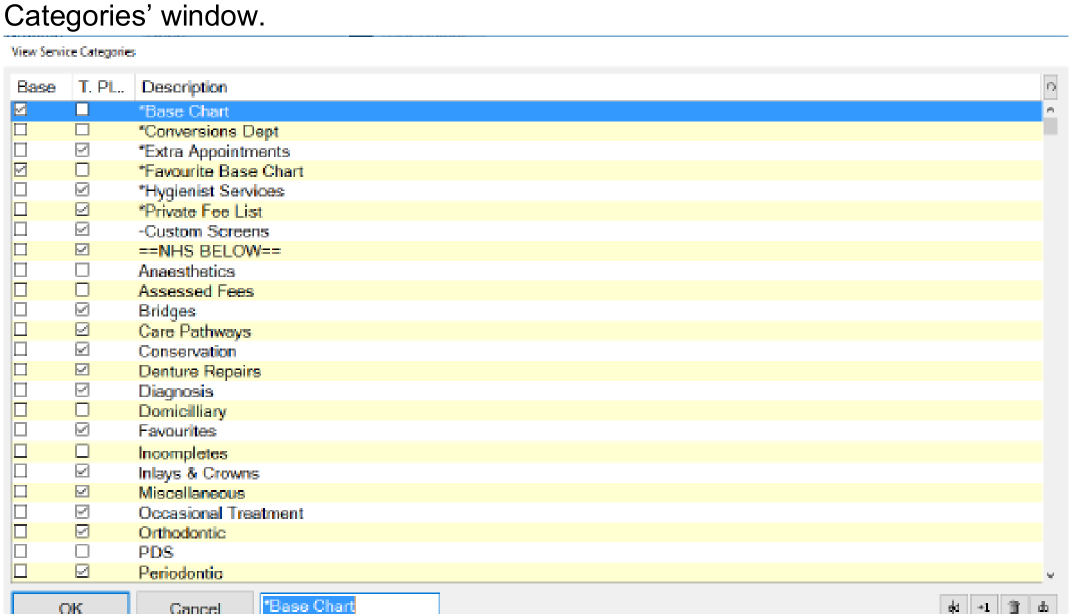
6. Repeat for any other services you need to amend.

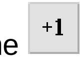
Adding Services to Categories

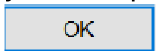
1. Have the required ‘Edit Service Item’ screen open. This is done by locating the service item in the service list and double clicking on it (please note if you are on the service list on the chart tab you will need to right click on the service and select edit)

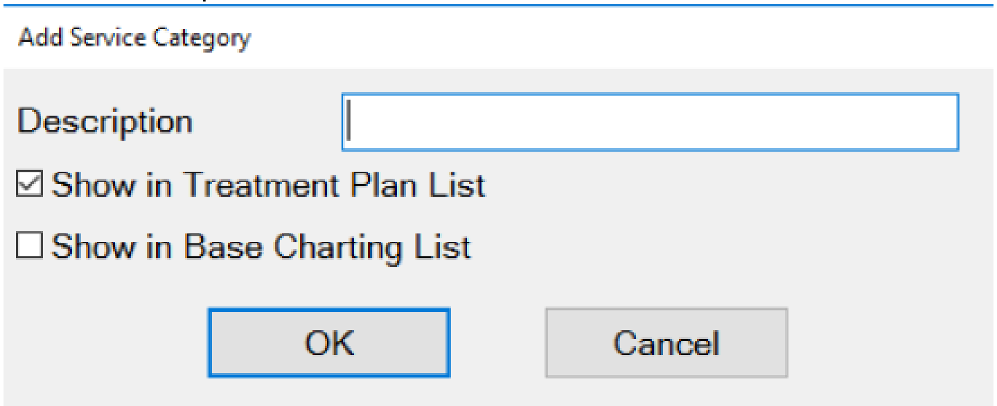


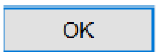
2. Click the icon to the right of the ‘Categories’ field; this will open the ‘View Service Categories’ window.



If the category that you would like to add the service to is not in the list click on the 

in the bottom right hand corner and you will see the 'Add Service Category' window. Give the new category a description and select whether it is for base charting or treatment then press 

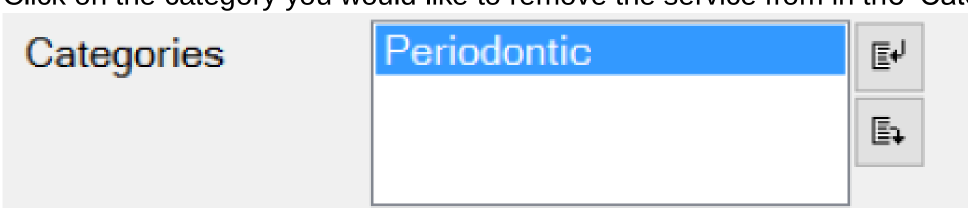


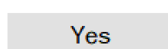
3. Ensure the category you would like to add the service to is highlighted and press 

.
4. You can add a service item to as many categories as you like. In order to add it to more categories follow steps 2 and 3.
5.

Removing a service from a category

1. Have the required 'Edit Service Item' screen open. This is done by locating the service item in the service list and double clicking on it (please note if you are on the service list on the chart tab you will need to right click on the service and select edit)
2. Click on the category you would like to remove the service from in the 'Categories' field



3. Click on the  on the right hand side and select 

Adding a Category to the Chart Tab

If a provider doesn't have a category available please follow the steps in the video.

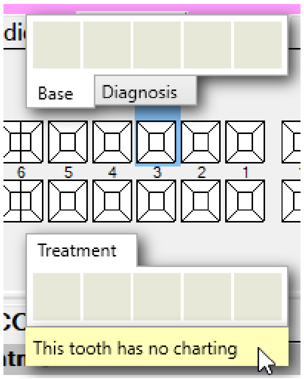
You can view the video guide using the link below:

https://www.youtube.com/watch?v=zSxtGjEv0JY

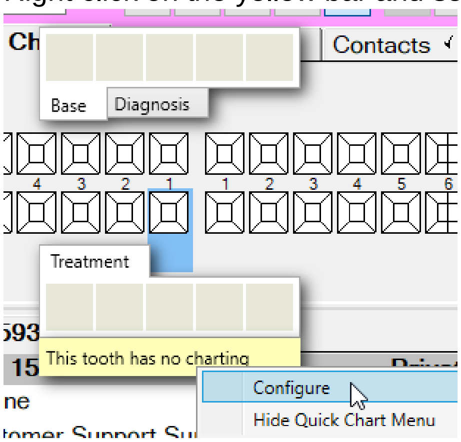
Configuring Quick Charting

Quick Charting is the hover box which displays a list of selected services when you move your cursor over the tooth chart.

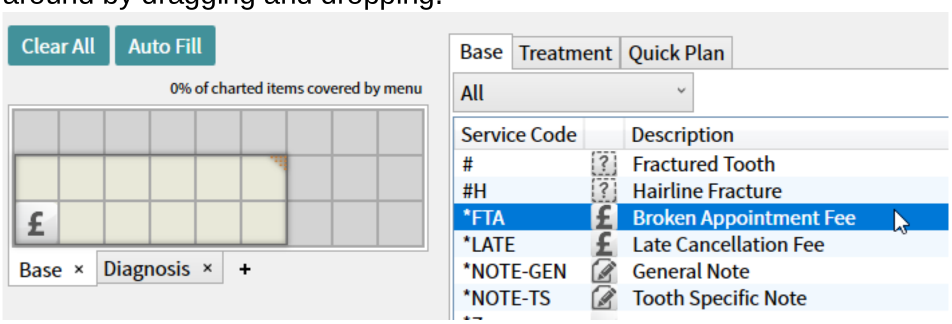
1. Go onto the chart tab of a test patient
2. Hover over the tooth chart and you should see the screen below

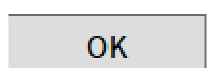


3. Right click on the yellow bar and select Configure



4. To add base items double click on them from the list on the right. You can move them around by dragging and dropping.



5. You can add up to 27 services to each tab to increase the amount of services you can add click on the triangle in the top corner of the selection window and drag as required.
6. Click onto the treatment tab and repeat step 4.
7. Once you are happy with your Quick Charting set up click on 

Quick Plans

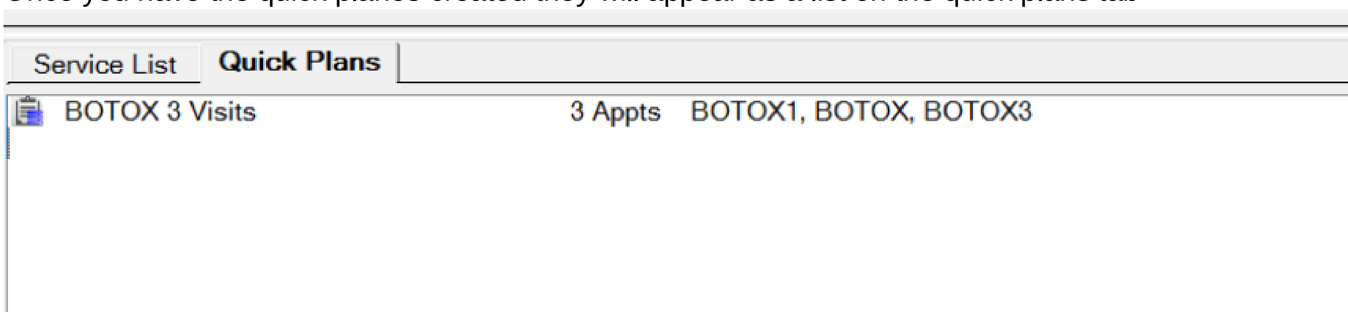
Creating Quick Plans

You can view a video guide using the link below:

https://www.youtube.com/watch?v=I1xWJ8pA-gY

Using Quick Plans

1. Once you have the quick planes created they will appear as a list on the quick plans tab



2. Double click on the required quick plan and the COT will be added to the chart.

PLEASE NOTE: Once you have created a quick plan the services that make up the quick plan cannot be amended. You will be able to change the name, graphic, quick plan action, payor and filter options using the button on the bottom right hand side of the quick plan window.

Creating Consent Forms for Clinipad

You can view a video guide using the link below:

https://www.youtube.com/watch?v=aHyS6MtIIGY

Adding Quick Notes

You can view a video guide using the link below:

https://www.youtube.com/watch?v=c55dncYoJoY

Adding/Removing Tabs in the Activity Area

You can view a video guide using the link below:

https://www.youtube.com/watch?v=bCd0inrNeGM

Creating Custom Screens

You can view a video guide using the link below:

https://www.youtube.com/watch?v=to6fbkM5kXE

CHARTING TREATMENT

Moving Patients to the chair

You can view a video guide using the link below:

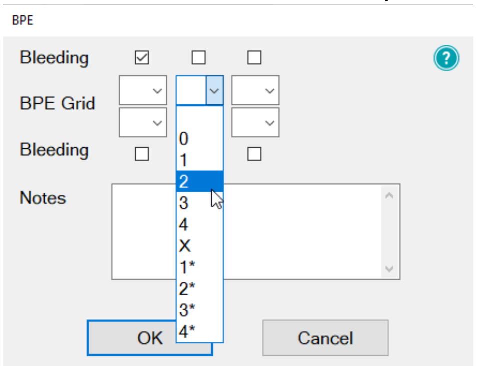
https://www.youtube.com/watch?v=xhvm6ssc1d0

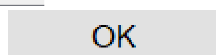
Recording BPE

Adding the BPE

1. Once you have opened the patient record click on the 'Perio' tab
2. Click on the 

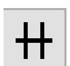
under the lower window on the left hand side of the screen
3. Use the check boxes and drop downs to record the patients BPE

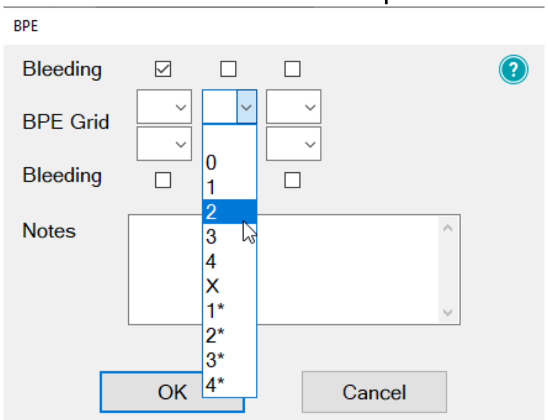


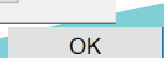
4. Once you have completed select 

BPE Shortcut

In order to add the BPE score for a patient follow the steps below:

1. Click on the  button on the patient tool bar
2. Use the check boxes and drop downs to record the patients BPE

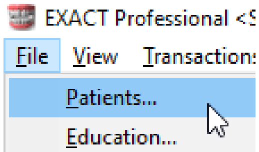


3. Once you have completed select 

Treatment Planning

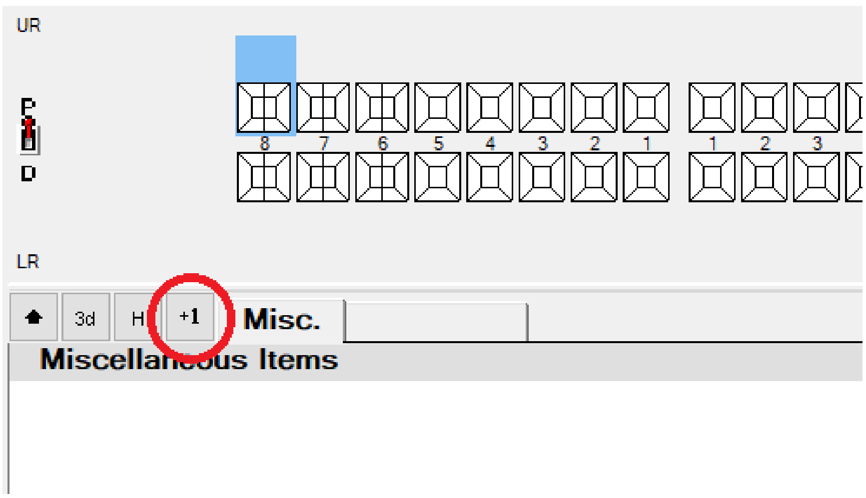
Opening a Course of Treatment

1. Go to File > Patients

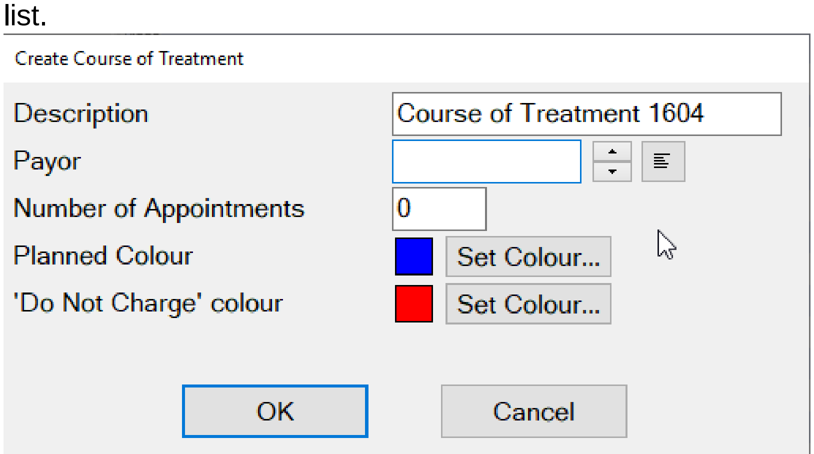


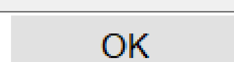
Or click on the patient's button on your workspace

2. Click onto the 'Chart' tab
3. Underneath the tooth chart to the left hand side click on +1

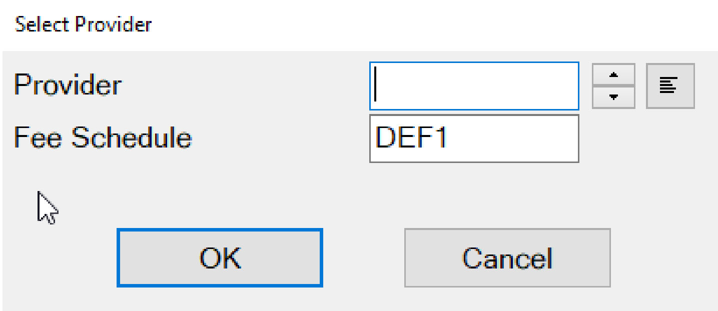


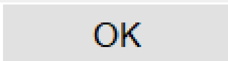
4. On the 'Create Course of Treatment' screen select which payor the course of treatment is for. If it is a Private course of treatment please the field blank. For any other payor you will need to click on the  button to the right hand side and choose from your available list.



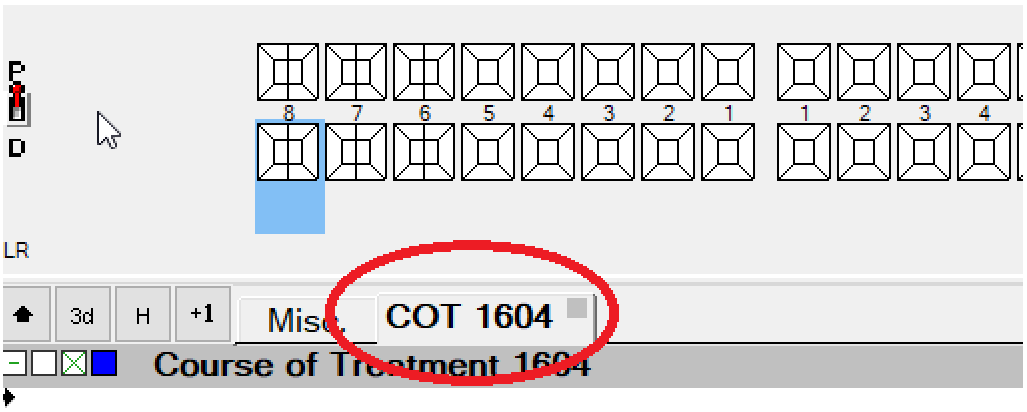
5. Once you have selected your payor click on 

6. If you are not logged in as a provider you will need to enter the dentist, hygienist etc. initials into the 'Provider' field – you can use the list button view all the available treatment providers at your practices



7. Click 

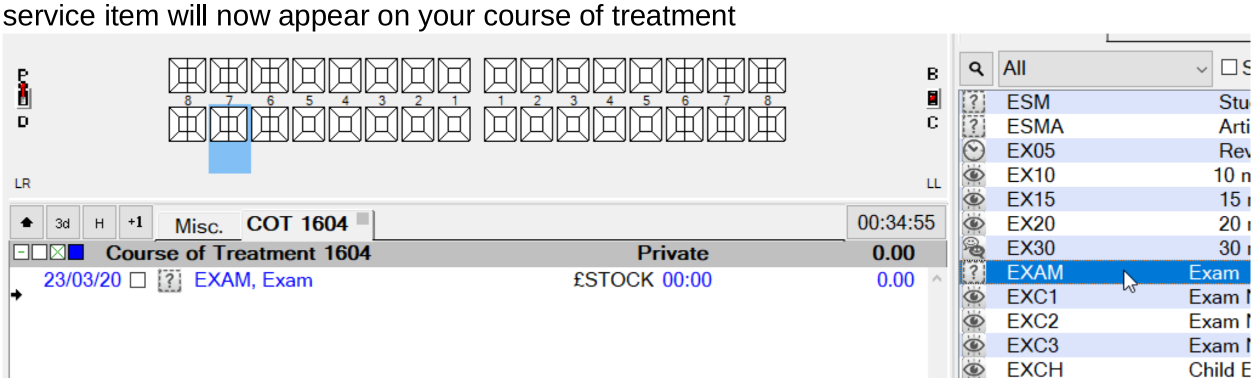
8. Your Course of Treatment will now show on the chart tab underneath the tooth chart



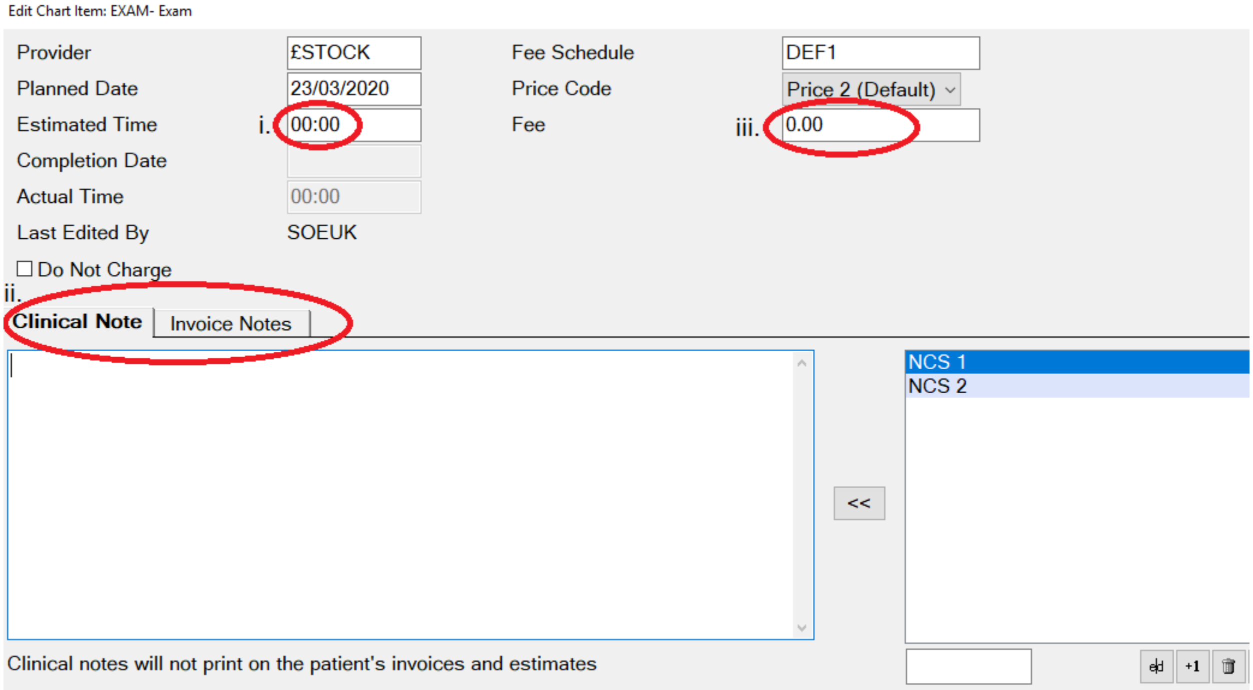
Charting Treatment

Once you have opened a Course of Treatment you can begin to chart your treatment

1. Select an item from your quick charting or double click an item from your service list. The service item will now appear on your course of treatment

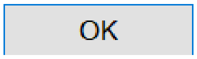


2. Double click on the service in the COT window



You can then do the following:

i. Add an estimate time that the service will take to complete
ii. Add any clinical notes/invoice notes
Please note anything added to the Invoice Notes tab will appear on all patient stationary e.g. estimates and invoices.
iii. Add or amend the fee for the item

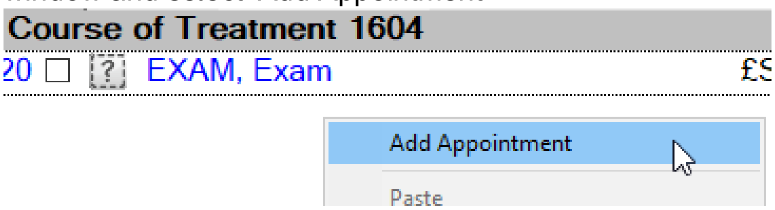
3. Once you are happy with the changed select 

4. Repeat for all services that you need to add to the COT

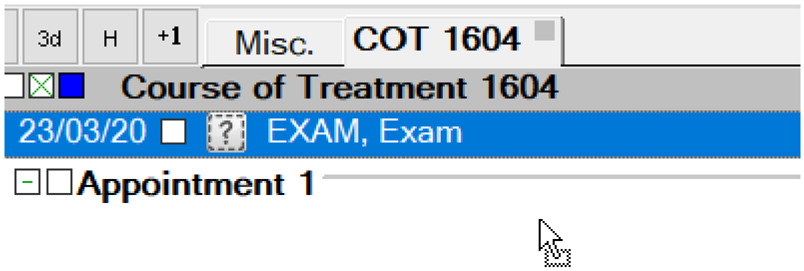
Adding Appointments

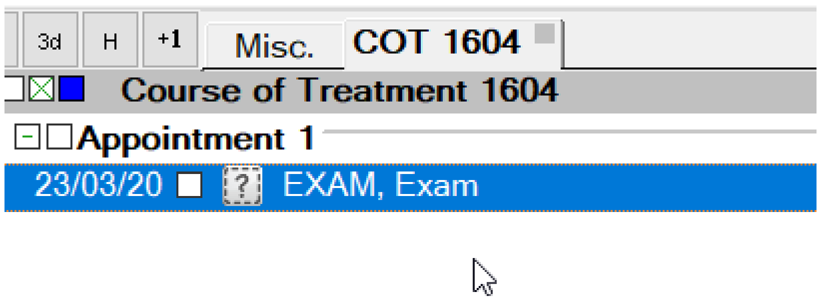
If you are planning a COT where multiple appointments will be required you can add appointments to your COT screen to break up the service items and make them easier to read.

1. Once you have added a service item to your COT right click on white space on the COT window and select ‘Add Appointment’



2. The appointment will appear underneath the item you have already charted. To move this service item into an appointment left click and hold down on and you will be able to drag this into Appointment 1

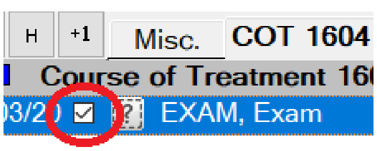




3. Repeat step 1 for each appointment you need to add charting your services as you go.

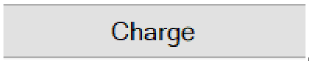
Marking Treatment as Complete

Once you have completed a service on a patient you will need to mark it as complete in Exact. You can do this by click on the check box to the right of the service.



Please note: treatment should be ticked as soon as it is completed as Exact picks up the completion date from the day the service item is ticked.

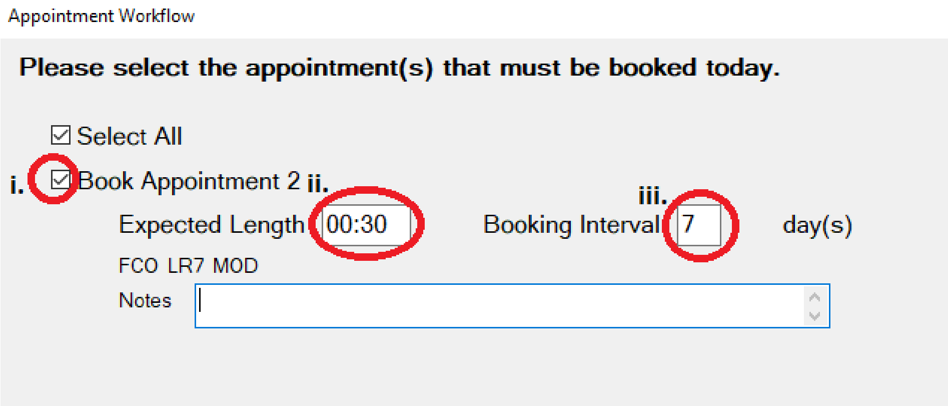
Charging Treatment

Once you have marked treatment as complete you will need to select 

. This will lock the completion date and fee for this item and send the required payment to the reception departure work flow.

Scheduling Future Appointments

Once you have charged your treatment if there are any future appointments you would like the reception team to book you will need fill out the screen below which will display once you have charged the first appointment through.



i. Add a tick in this box if you would like the receptionist to book this appointment.
ii. Add the length you would like the appointment to be
iii. Add how many days in the future you would like the appointment to be.

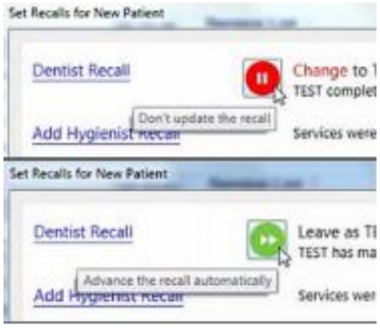
Once you are happy with the information entered select Close at the bottom of the screen.

Recalls

Depending on your recall set up you will be prompted to set a recall date for your patient when charging treatment. The recall date should automatically set to the default recall interval chosen by the practice.

Advancing and pausing recalls

From the recall prompt you can do the following:

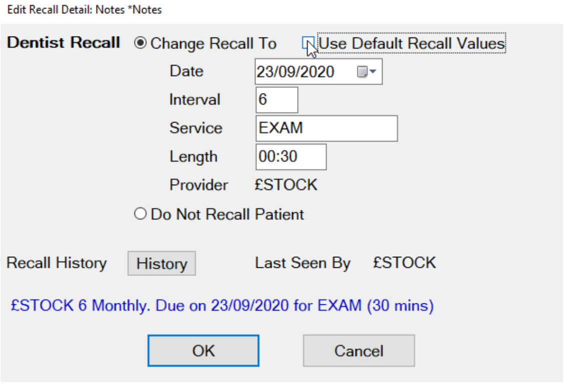


Will allow you to not advance the recall date.

Will allow you to advance the recall date to the suggested default.

Changing the recall interval

1. If you would to amend the recall interval from the default click on '[Dentist Recall]' or '[Hygienist Recall]' and you will see the screen below:

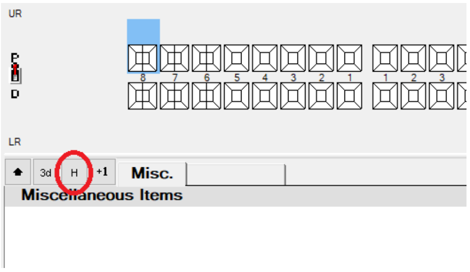


2. Untick 'Use Default Recall Values' and you will then be able to edit the recall interval, service and length as required.
3. From this screen you can also set the patient to 'Do Not Recall Patient' and this will stop them receiving any recall communications.

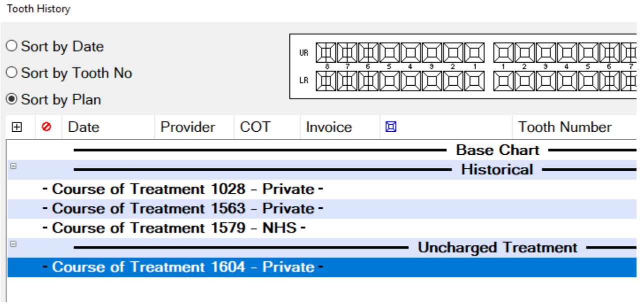
Viewing Treatment History

To view a patients full treatment history first go to the patients chart tab and follow the steps below:

1. Underneath the tooth chart to the left hand side click on H



2. This will open the patients treatment history broken down into three sections Base Chart items, Historical (items which have been charged) and Uncharged Treatment (planned work)

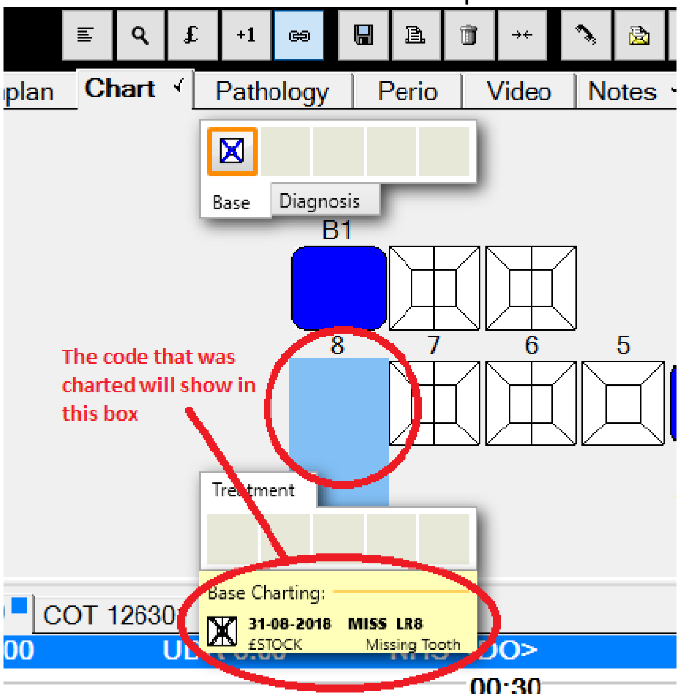


3. You can sort this screen in three ways:
   i. **Sort by Date** – this will show you the treatment in date order with the newest work showing at the bottom.
   ii. **Sort by Tooth No** – this will show all service items grouped together by tooth
   iii. **Sort by Plan** – this will show all service items grouped together by which Course of Treatment they were completed on.

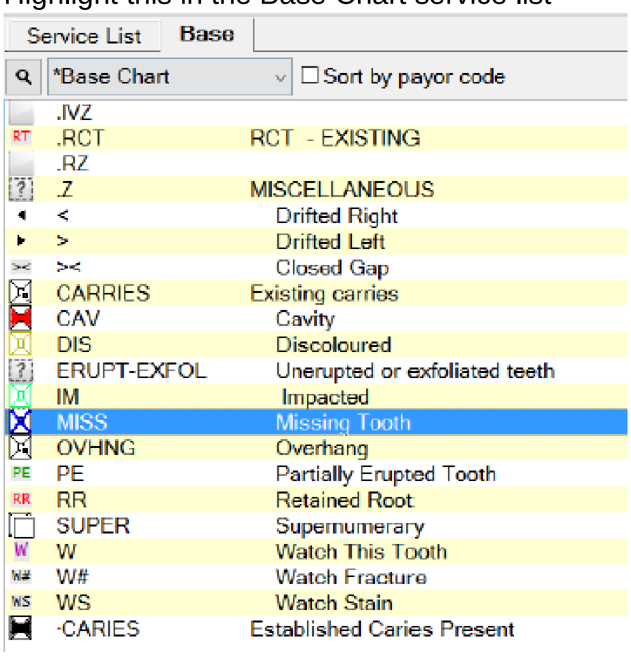
Removing Incorrect Base Charting (Voiding)

Voiding treatment from the tooth chart

1. Go to the patients chart that you wish to edit
2. Hover over the tooth to find out the precise code that was used originally



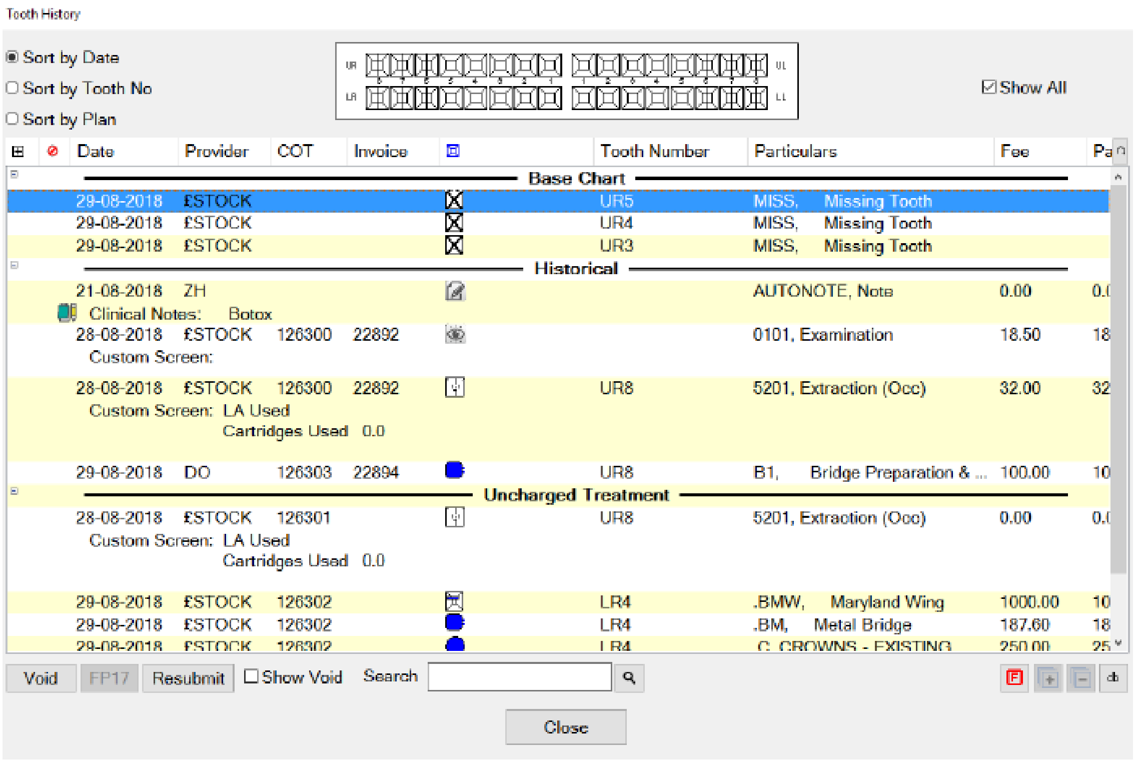
3. Highlight this in the Base Chart service list

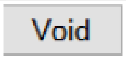


4. Click onto the tooth in question and this will remove the incorrect base charting on the patients tooth chart.

Voiding treatment from the patients history

1. Use the steps in ‘Viewing Treatment History’ to access the history window
2. Scroll up to find the base charting section and highlight the item you want to remove



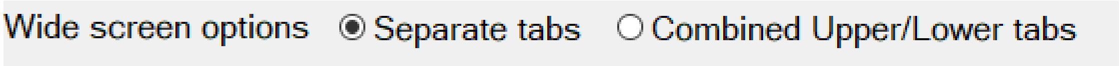
3. Then click on  in the bottom right hand corner and this will remove the charting.

THE PERIO TAB

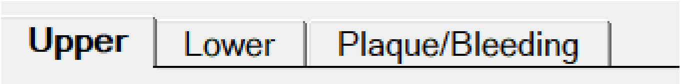
Classic Perio

Configuring classic perio

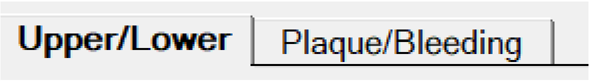
From the patients file select the ‘Perio’ tab you will see the options below



1. **Separate tabs** will allow you to record perio on the upper and lower arches on separate tabs



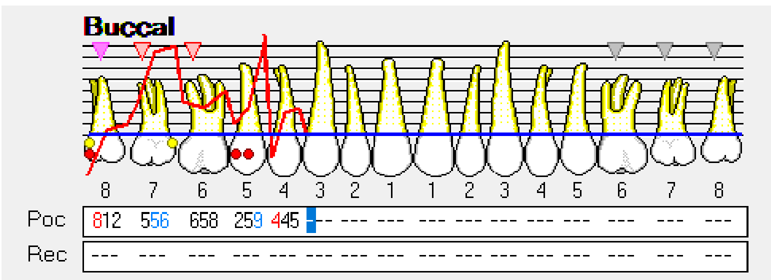
2. **Combined Upper/Lower tabs** will allow you to record perio on the upper and lower arches on the same tab.



Recording Perio using the classic perio screen

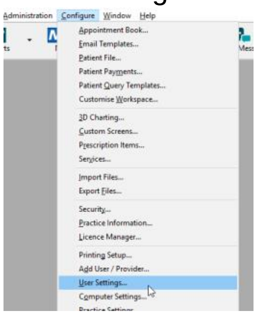
1. Go to the Perio tab
2. Click on the 

at the bottom of the top window to the left hand side
3. You can now begin charting from the R8 – L8 on each of the arches
    i. You can type numbers in to chart the pockets and recession. If the number is above 9 you will need to click on '+' on your keyboard followed by the number e.g. 15 is '+' followed by 5 – these will show in blue.In order to chart an overgrowth press the '–' key on your keyboard followed by a number these will show in red..
    ii. To add Furcation you will need to click on the triangles. One click will give you grade 1, two clicks grade 2 and three clicks grade 3.
    iii. To chart Suppuration click 's' on your keyboard and to add bleeding click the 'b' key.

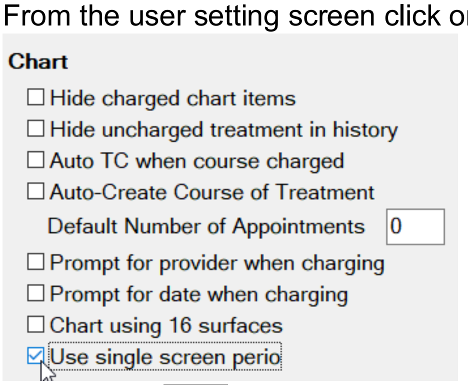


Turning on Single Screen Perio

1. Go to Configuration > User Settings



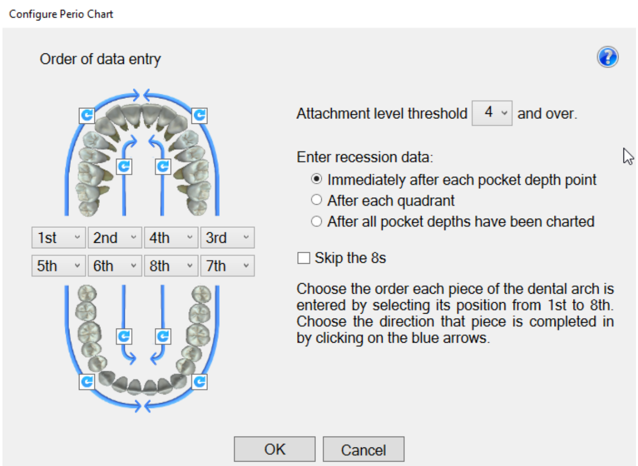
2. From the user setting screen click on the box next to 'Use single screen perio'



3. Click on the  icon on the tool bar.

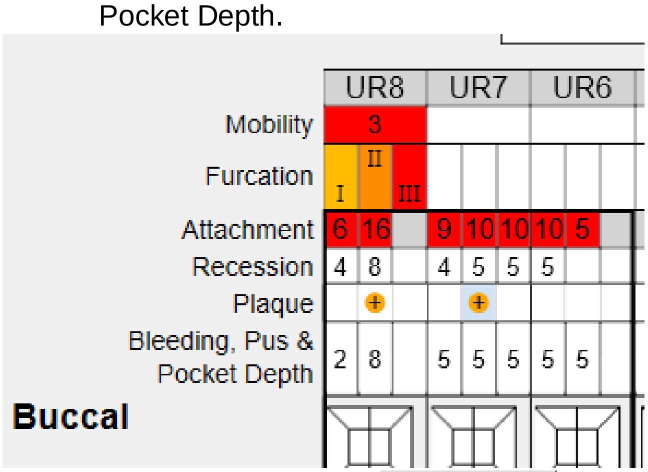
Configuring single screen Perio

1. Go to the 'Perio' screen on a patient file
2. Click on the in the bottom right hand corner
3. On the screen below you can set the way that you chart including the order in which date is entered, attachment level threshold and recession data.



Using Single Screen Perio

1. From the Perio tab click on the +1 beneath the top window on the left
2. Add a title for your perio charting
3. From the chart you can add the following
   i. **Mobility** – Click on the field; one click is 1,two clicks is 2 and three clicks is 3
   ii. **Furcation** – Click on the field; one click is 1,two clicks is 2 and three clicks is 3
   iii. **Plaque** – Click in the field
   iv. **Recession and Bleeding, Pus & Pocket Depth** – add numerical values
   v. Attachment – will automatically total from the recession and Bleeding, Pus & Pocket Depth.



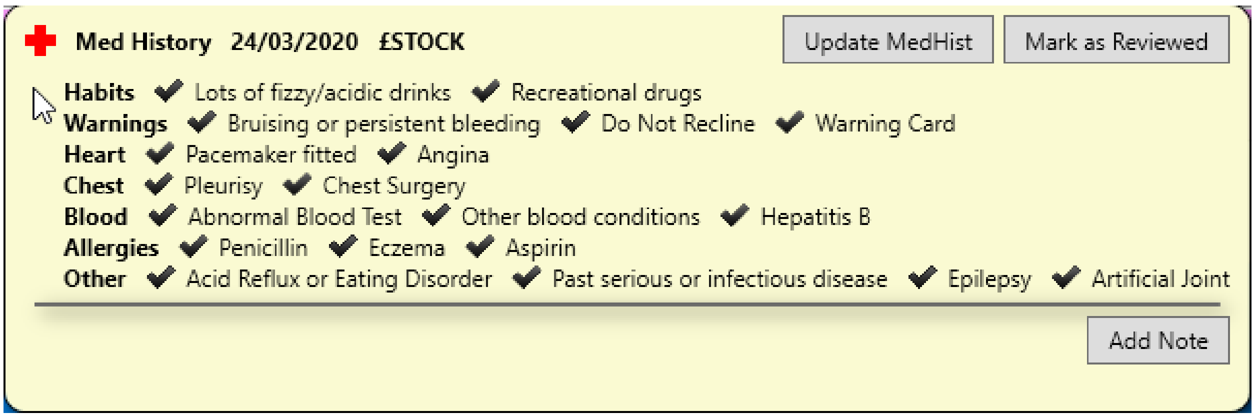
4. Once you are finished select OK and your charting will be saved.

THE MEDICAL TAB

Updating the medical history

Updating the Medical History with Clinipad

If you are using clinipad your patient would have filled out their medical history form on arrival. When you move the patient to the chair you should see the pop up box below

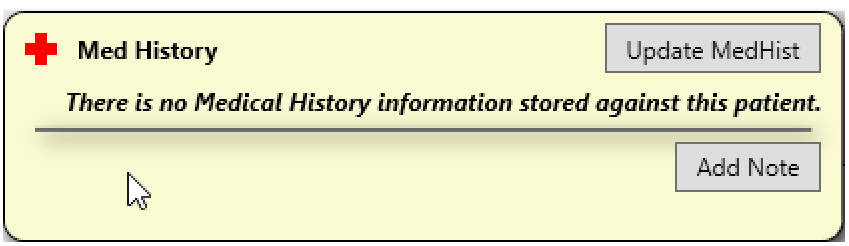


From this window you can do two things:

1. **Update MedHist** – this will need to be pressed if the patient remembers anything that they did not add when filling in the clinipad.
2. **Mark as Reviewed** – If there are no changes required and you have confirmed this with the patient click Mark as reviewed. This will save a line entry on the medical history tab with the date that you reviewed it.

Updating the medical history from a paper form

If you are working with paper based medical history forms when the patient arrives you will see the box below:

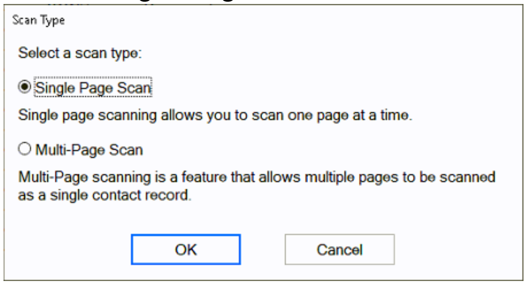


From this screen click on 'Update MedHist'. From the medical history window select all that apply and put a tick in ☐ Reviewed by at the bottom of the form then select Save.

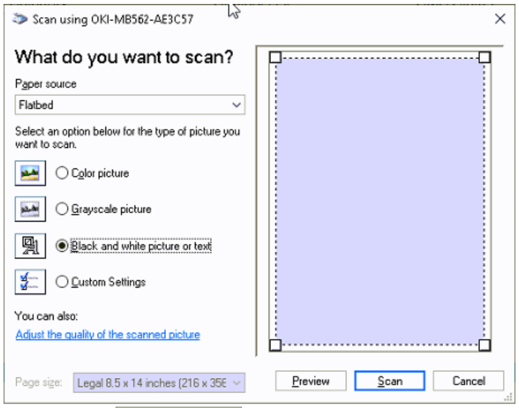
Please then scan the paper form into the patient file using the steps below:

1. Click on the contacts tab
2. Click on Scan in the bottom right hand corner

3. From the screen below select the scan type – if your medical history is only one page select ‘Single Page Scan’ and if it is more than 1 select ‘Multi-Page Scan’

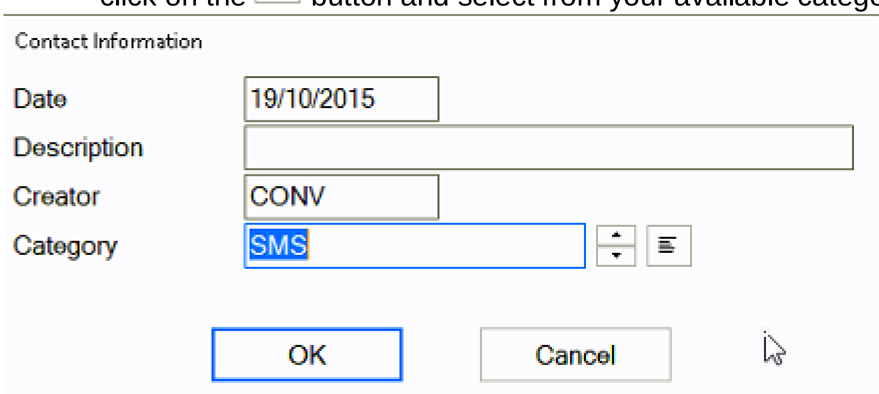


4. From the screen below select the paper source from the drop down (this is whether you will be using your flatbed or feeder) and choose the picture type – I would advise to use Black and White as this will be a smaller file.



5. Click on 

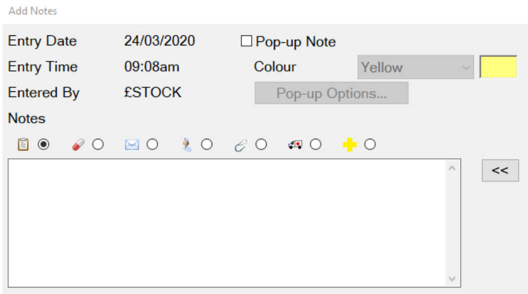
6. You will see the screen below:
   I. The **date** will automatically generate to the date you are scanning the item in. If you need to backdate this you can.
   II. You will need to enter a description so that people can easily identify the document is.
   III. The **creator** will automatically be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



Medical Notes

Adding a Medical Note

1. go to the 'Medical'
2. Click on Add Note in the top right hand corner
3. Enter you notes in the text field below, you can also chose the con that is relevant for your note.

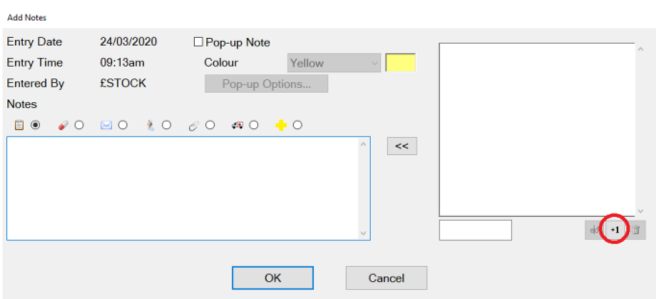


4. Once you have finished your note select OK
5. This will then save a line entry on the medical history.

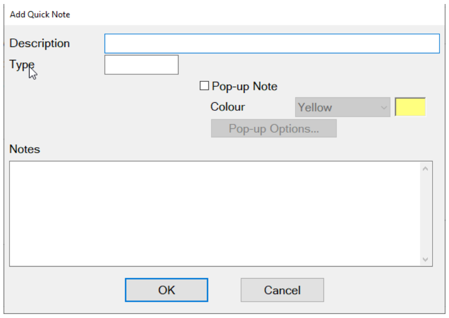
Setting up Medical Quick Notes

If you have medical notes than you will frequently need to use it would be handy for you to set these up as Medical Quick notes

1. Go onto a test patients file
2. Click on the 'Medical' tab
3. Click on Add Note in the top right hand corner
4. On the screen below select the +1



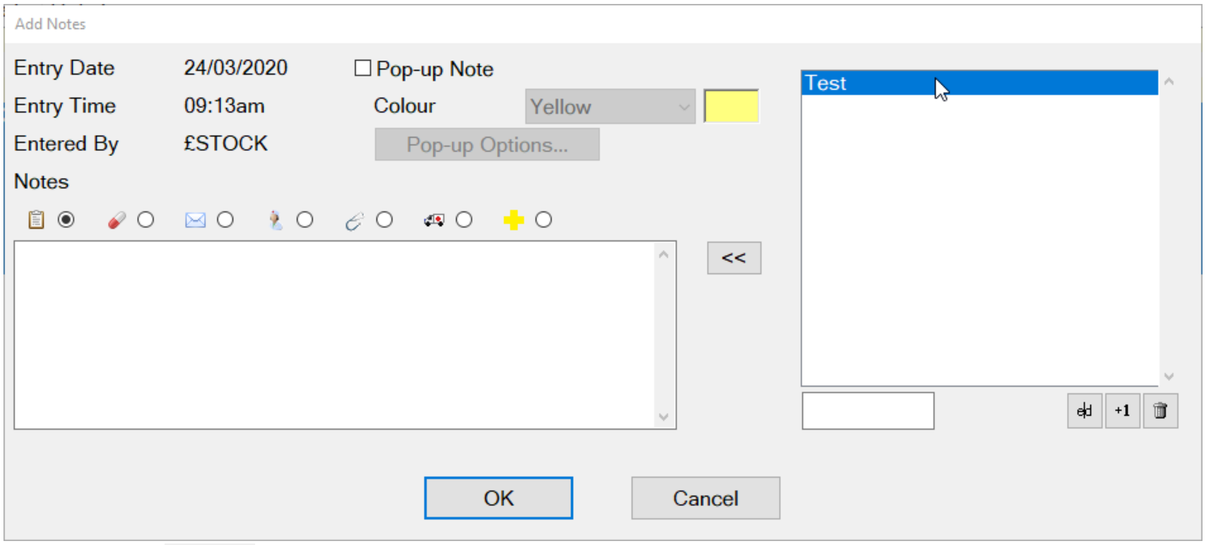
5. On the new window that opens below add a description then add the main body into the 'Notes' section



6. Once you are finished creating your template select OK

Using Medical Quick Notes

1. Go to the patients’ ‘Medical’ tab and select Add Note
2. Click on it in the list of the left

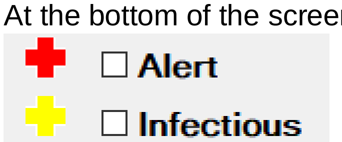


3. Click on the << to add it for the patient.
4. Edit as required then select OK.

Medical Alerts

Adding Medical alerts

1. Go to the patients ‘Medical’ tab
2. At the bottom of the screen you will see the icons below



3. Click into the relevant box to add an alert to a patient

Viewing Medical Alerts

On the patients tool bar you will see the medical history ‘+’. The icon will show in different colors depending on the alert set:

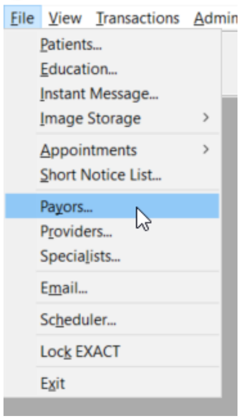
	No Medical Alert Set
	The Alert box is checked **or** both the Infectious and Alert box are ticked
	The infectious box is checked

PAYOR PAYMENTS

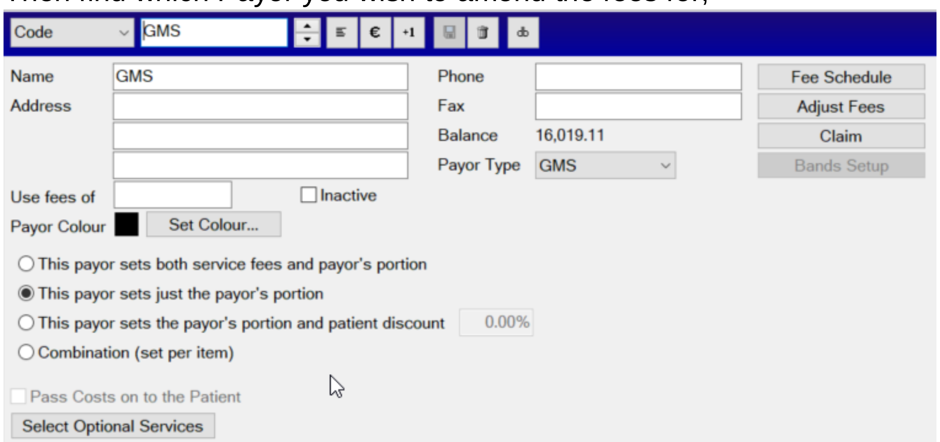
Payor Fee Schedule

GMS and PRSI fees can be amending within Exact;

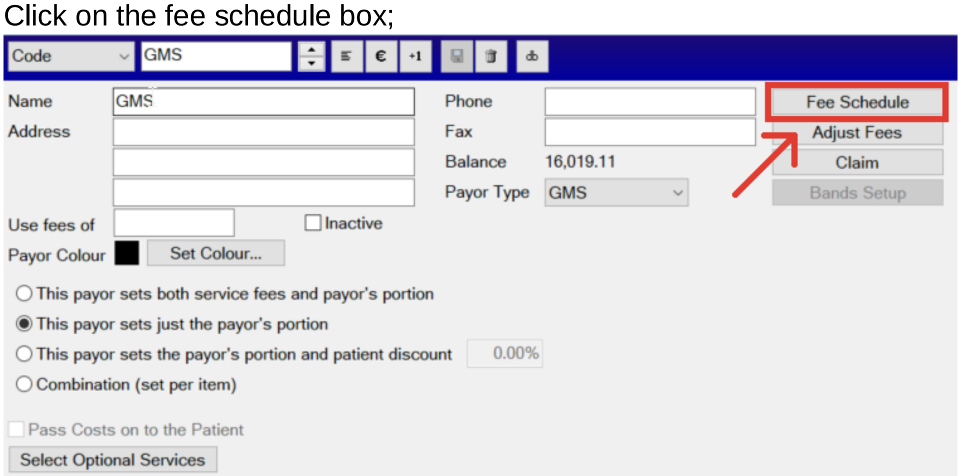
1. Click on **File > Payors**



2. Then find which Payor you wish to amend the fees for;

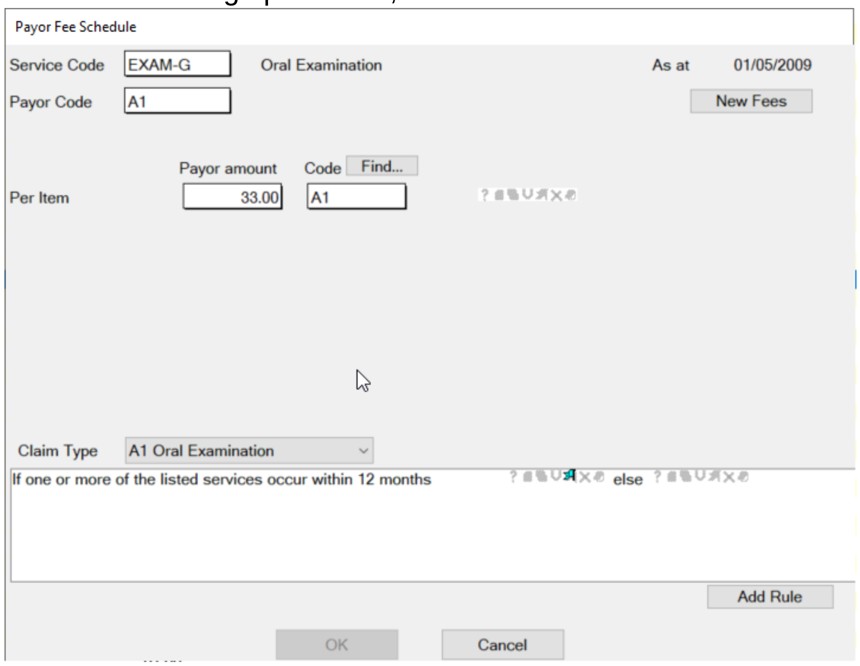


3. Click on the fee schedule box;

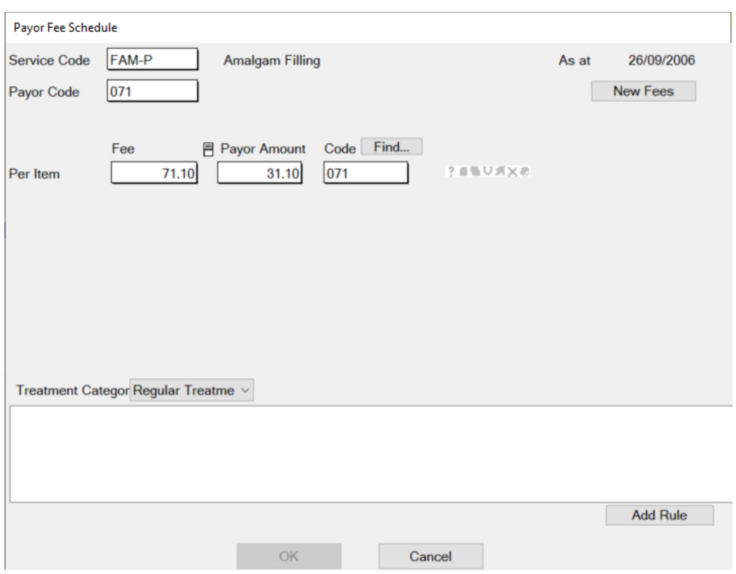


4. This will bring you into the list payor fees and will bring up all your service codes. Find which code you wish to amend the fee for, by either scrolling through the list, or by searching in the bottom left corner.

5. Click in the code you want to amend and with GMS where there is only the payor fee to amend if will bring up this box;



6. You can then amend the fee in the payor amount box. With PRSI fees, you can change the Payor amount and also the Patient contribution. When you follow the above steps but in the PRSI payor you will get this box when you click into the service you want to edit;

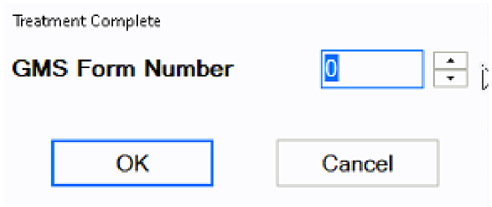


There is an additional box of **fee,** this is the total amount that you receive for the service being done, so the **patient contribution** and the **payor amount** added together will equal the **total fee**

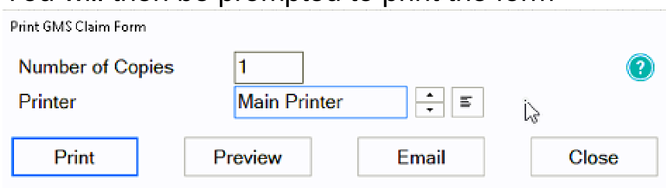
So using the service above the patient will pay **€40** and you will receive **€31.10** payor contribution, totaling **€71.10** for the total service fee.

GMS Claim Form

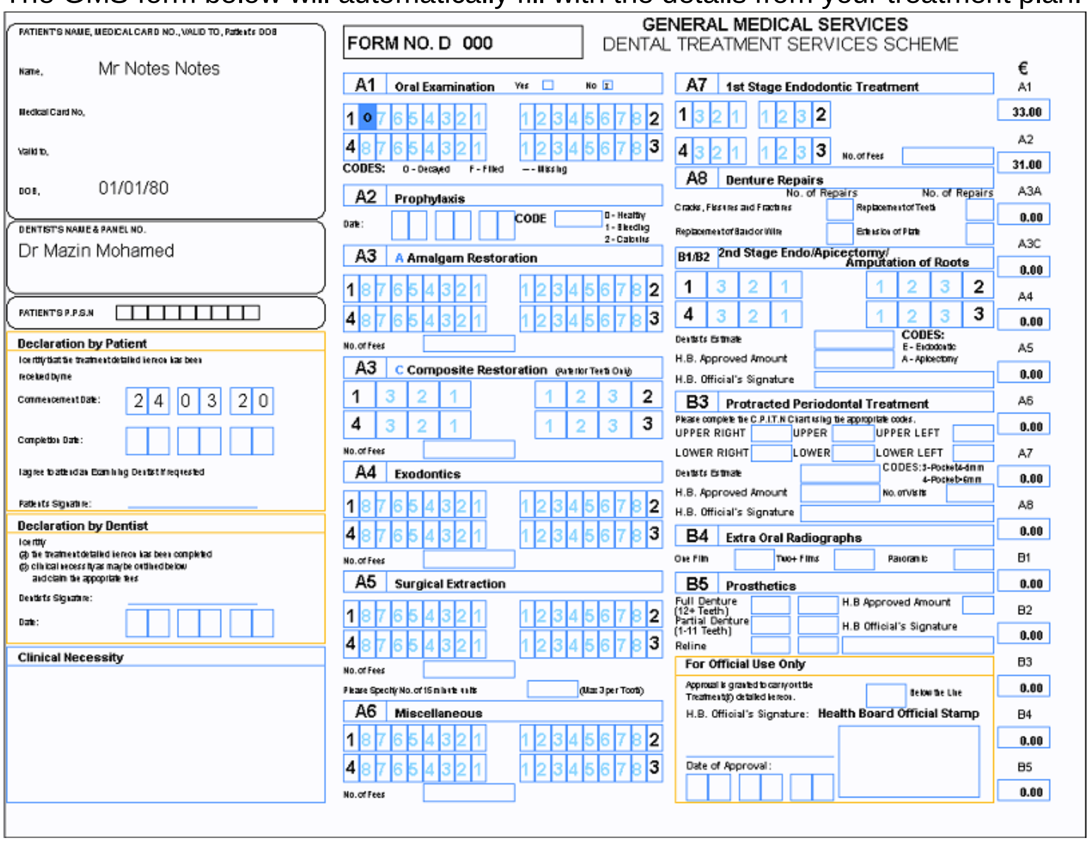
1. Open a GMS COT
2. Charted all the relevant treatment
3. Click on the  icon at the bottom of the COT window.
4. You will then see the 'Treatment Complete screen which will show the GMS Form number. This number should automatically generate from your system numbers



5. Select OK
6. You will then be prompted to print the form



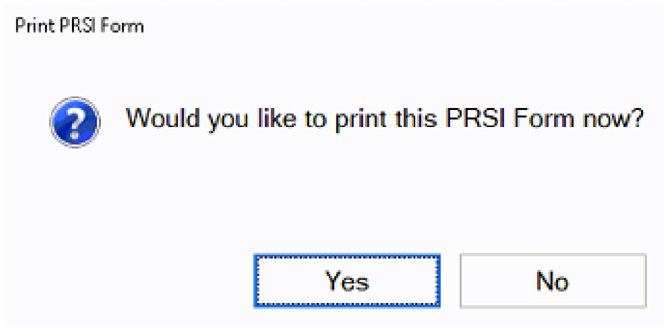
7. The GMS form below will automatically fill with the details from your treatment plan.



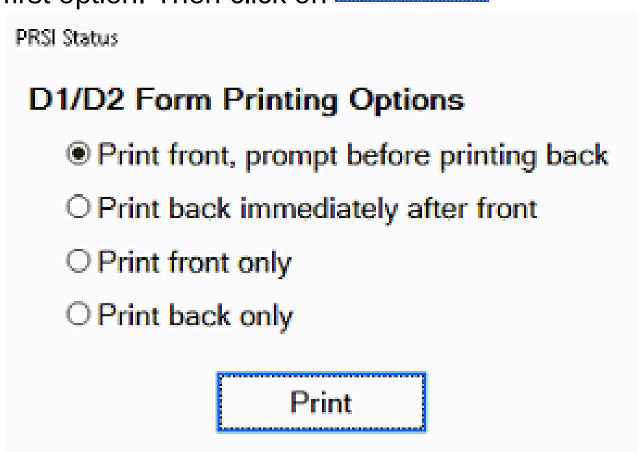
D1 Claim Form (PRSI)

Printing the form

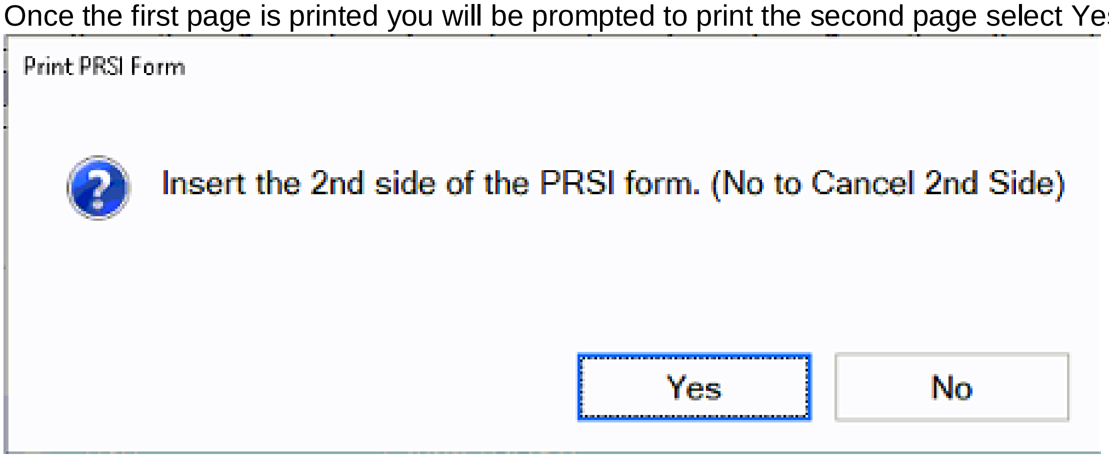
1. Open a PRSI COT
2. Click on the icon at the bottom of the COT window.
3. On the screen below select Yes



4. Choose the relevant option if you do not have a duplex printer I would advise to use the first option. Then click on Print



5. Once the first page is printed you will be prompted to print the second page select Yes



Page 1

This is to be filled out by the patient. If available the information for the form such as name and address will be pulled through from the patient file.

DEPARTMENT OF SOCIAL & FAMILY AFFAIRS

CLAIM FORM FOR DENTAL BENEFIT **D1**

Please answer all Questions fully and place a tick ☑ in the appropriate boxes

PART 1 Details about Yourself

PLEASE USE BLOCK LETTERS

Please state your:

PERSONAL PUBLIC SERVICE NUMBER (PPS No.) same as RSI/TAX NUMBER

Figures							Letters	

Old Insurance Number (if you were employed before 1979) ______

Full Name Mr Notes Notes

Address ______

	DAY	MONTH	YEAR
Date of Birth	1	1	1980

Birth Surname ______

Mother's Birth Surname ______

Telephone Number ______

Are you? Single ☐ Married ☐ Other ☐

Are you in paid employment? YES ☐ NO ☐

If 'YES' state present Employer's Name ______

If 'NO' state date you last worked ______

Are you getting any payments from this Department, a Health Board or from any other source? YES ☐ NO ☐

Type of Payment ______

Claim Number ______

If you are participating in a Scheme, i.e. FÁS, CES, etc. Please state:

Type of Scheme ______

If you attended college in the last two years state dates:

FROM MONTH ___ YEAR ___ TO MONTH ___ YEAR ___

Do you hold a medical card? YES ☐ NO ☐

PART 2 Working in another EEA Country

Did you ever work in the United Kingdom or in any other EEA Country? YES NO

If 'YES' state the Country ______

Period of employment in that Country

FROM MONTH ___ YEAR ___ TO MONTH ___ YEAR ___

FROM MONTH ___ YEAR ___ TO MONTH ___ YEAR ___

PART 3 Name your Dentist

If my application is approved, I wish to get my treatment from

Dentist's Name Dr Mazin Mohamed, BA BDentSC

Address Unit 16 Block C, Smithfield Market

Smithfield Dublin 7

PANEL NO. 8785814V

I understand that s/he must be on the Dental Panel.

I declare that all the details given are true and complete. I understand that I must not change my Dentist during this course of treatment without the consent of the Department.

SIGNED ______ **DATE** 24/03/20

DECLARATION

To be signed by you when treatment is finished

I declare that the treatment outlined overleaf has been carried out to my satisfaction.

SIGNED ______ **DATE** ______

To be signed by your Dentist

Complete and return within one month of finishing treatment.

I have completed the treatment in this case.

I claim payment of € ______

SIGNED ______ **DATE** ______

PANEL NO. ______

DATA PROTECTION AND FREEDOM OF INFORMATION. The Department of Social and Family Affairs will treat all the information and personal data which you give as confidential. It will only be disclosed to other bodies in accordance with Social Welfare law and it will be subject to the Department's responsibilities under the Data Protection Act and Freedom of Information Act.

Part 2

This is to be filled out by you

PART 4 TO BE COMPLETED BY YOUR DENTIST

Insert in the chart the number corresponding to any natural teeth missing from the mouth on examination.

A		B
D		C

REPORT
Clinical necessity, where required for specific treatments should be entered here.

Code						Treatment	Fee
			DAY	MONTH	YEAR		
0	2	0				History, Examination, Diagnosis, Report & X-Rays	€ 33.00
0	3	0	Scale & Polish (including mild gum treatment)				€ 0.00
0	5	1	Protracted Gum Treatment				€ 0.00

Code			Teeth (A B / D C)	Treatment	Fee
0	7	1	A B / D C	Single Compound/ Amalgam Fillings	€ 0.00
0	7	4	A B / D C	Composite Anterior Fillings	€ 0.00
0	7	5	A B / D C	Pin Retained Fillings	€ 0.00
0	7	8	A B / D C	Angle/ Incisal Tip Fillings	€ 0.00
0	9	1	A B / D C	Extractions	€ 0.00
0	8	0	A B / D C	Endodontic Treatment	€ 0.00
2	1	0	A B / D C	Apicectomy	€ 0.00
1	2	2	A B / D C	Partial Denture	€ 0.00

Code			Item	Fee	Code			Treatment	Fee
1	2	3	Full Upper Denture	0.00	1	3		Denture Relines Upper or Lower	€ 0.00
1	2	4	Full Lower Denture	0.00	1	3	3	Denture Relines Upper and Lower	€ 0.00
1	2	5	Full Upper & Lower Denture	0.00	1	4	0	Denture Repairs	€ 0.00

Code			Miscellaneous Items	Fee
9	9	0	Miscellaneous Items: Please state treatment code(s) and tooth reference (s) 15.00 42.00 Clean (PRSI)	€ 42.00

Alternative Treatment

TOTAL FEE CLAIMED
(This fee does not include the claimant's portion of the cost, if any.)

€ 75.00

Claimant's portion of set fee items

€ 15.00

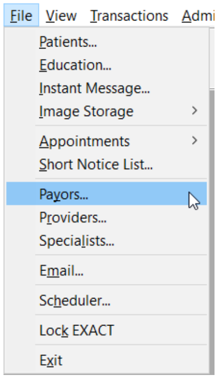
I accept this Dental Letter in accordance with the provisions of the Dental Agreement. I have examined the person named overleaf and have entered details above of all necessary treatment and its cost.

Signed: ______________ Panel No.: 8785814V Date: 24/03/20

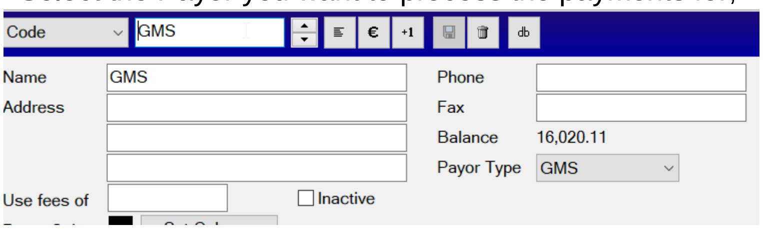
EXACT V13 PATIENT EXPERIENCE

Processing Payor Payments

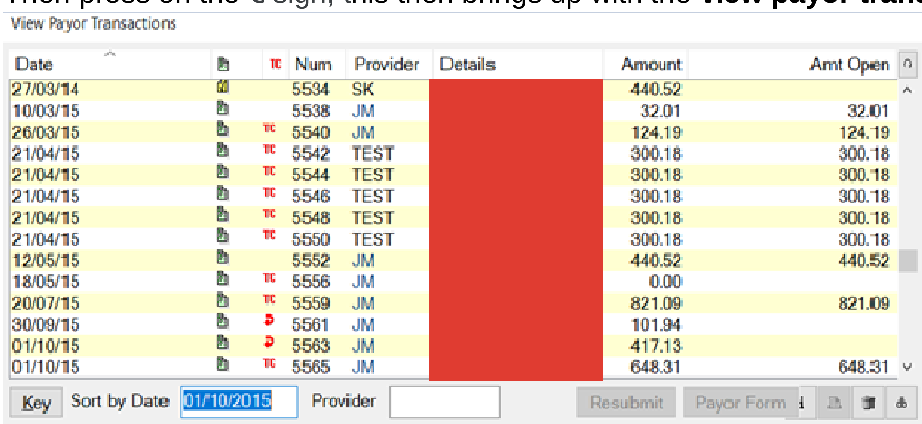
1. Click onto **File > Payors**



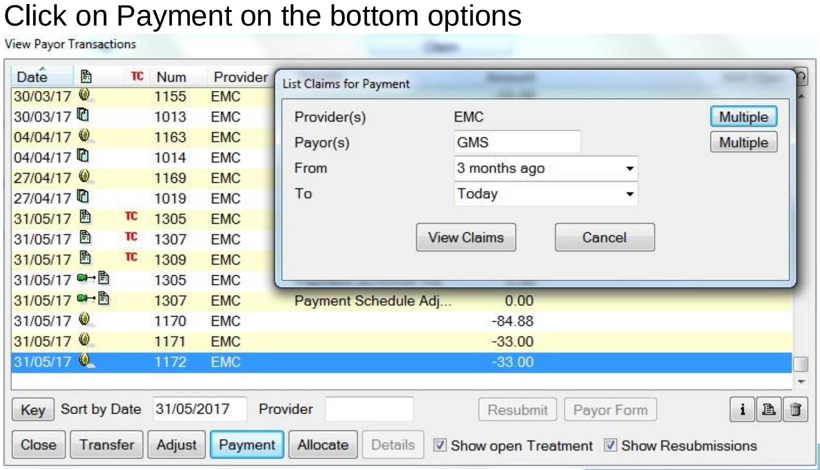
2. Select the Payor you want to process the payments for;



3. Then press on the € sign, this then brings up with the **view payor transaction** screen;

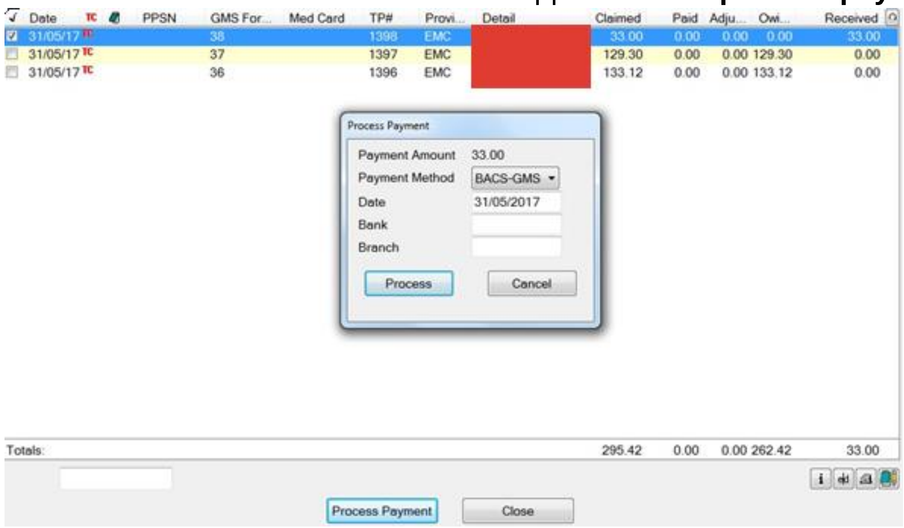


4. Click on Payment on the bottom options

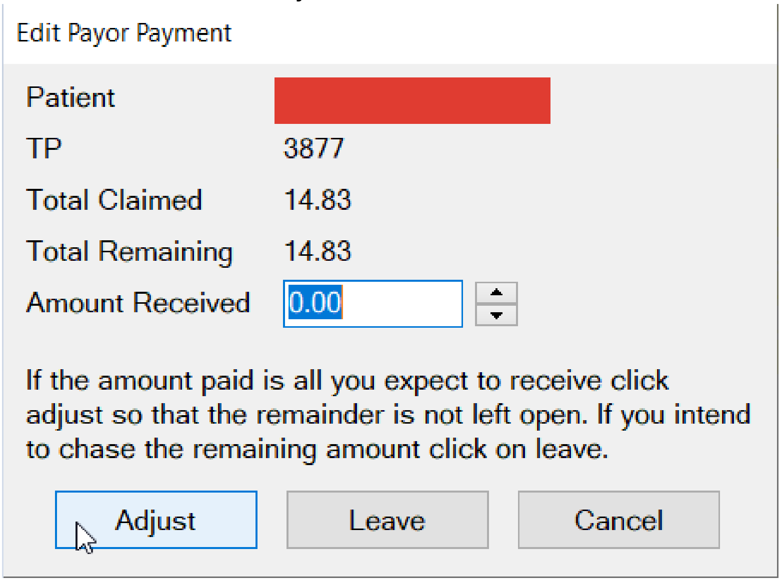


5. On the box that appears, select the provider and date range for the payments you want to view, and select **View Claims**

6. This will list the payor payments you are expecting, if they are correct and match, tick the box to the left of the claim so a tick box appears. **Click process payment**;



7. This will then bring up pop-up asking you to select payment method – usually BACS GMS and click **Process**.
8. If the payment is wrong or different to what you have received – double click on the claim and make the adjustment;



9. Then process by ticking it like a normal payment and **process payment**

Please note: when choosing a date range (steps 4/5) this date is taken from the date the COT is opened and **not** the date the treatment is planned or completed. As such if a COT is opened in January then left without charting and then treatment is added to it in July this COT will show under the January date range.

Resubmitting Treatment

You can view a video guide using the link below:

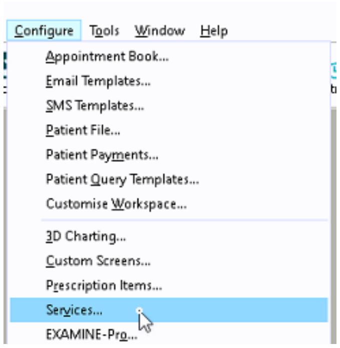
https://www.youtube.com/watch?v=Ndk7-lulPJQ&t=25s

MED2

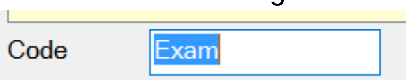
Setting Med2 Type on Services

The Med2 Type should already be set on services within Exact if you have added a new service and have not added the Med2 type, it will not appear on the Med2 form when printing this for a patient. To set this up complete the following steps:

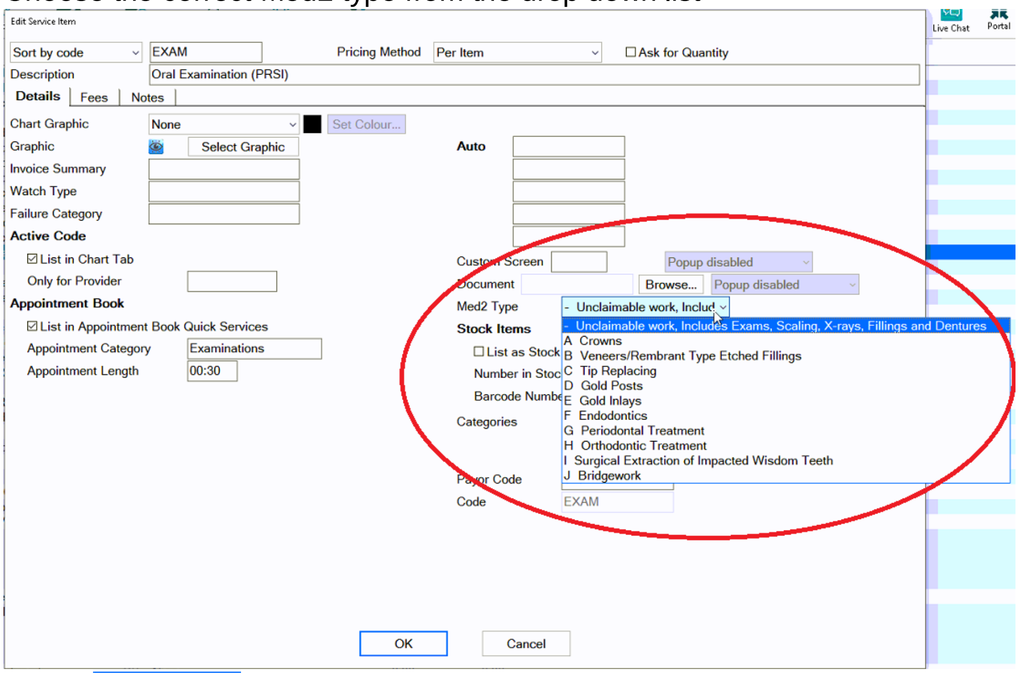
1. Go to Configure > Services

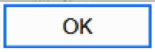


2. Locate the service you wish to set the type for – you can do this by scrolling through the service list or entering the services code into the bottom left hand corner



3. Double click on the service
4. Choose the correct Med2 type from the drop down list

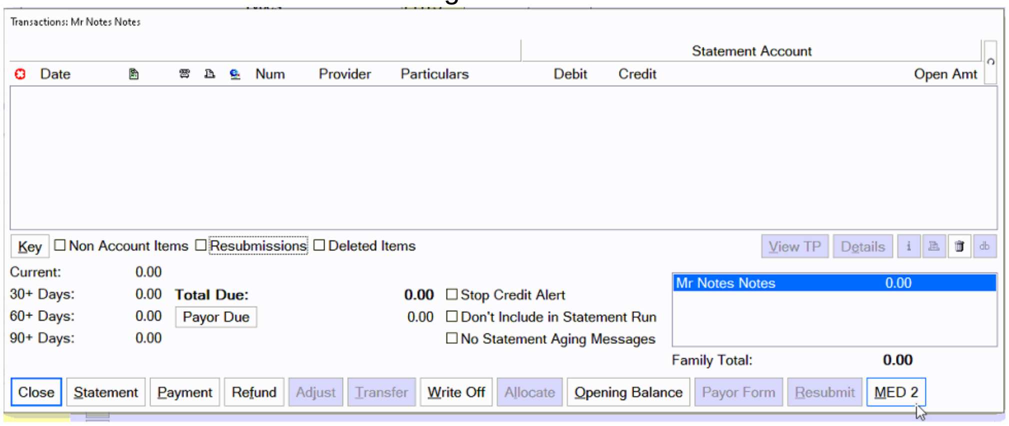


5. Select 

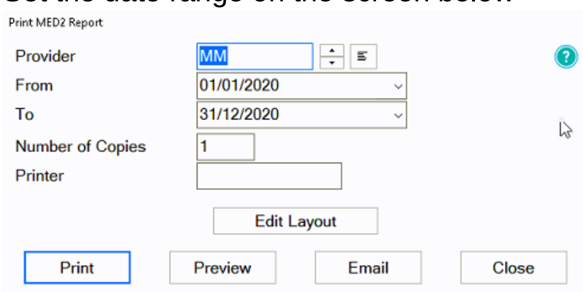
6. Repeat for any additional services you need to set the Med2 Type for.

Printing the Med2 form

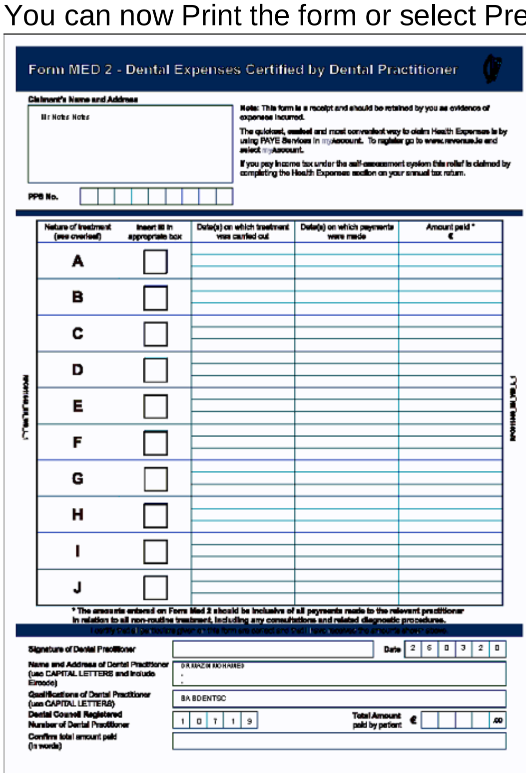
1. Click on the € from the patients tool bar
2. Click on MED 2 on the bottom right hand side of the screen



3. Set the date range on the screen below



4. You can now Print the form or select Preview to view it first



PATIENT INFORMATION REQUESTS

Printing Patient Details

You can view a video guide using the link below:

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

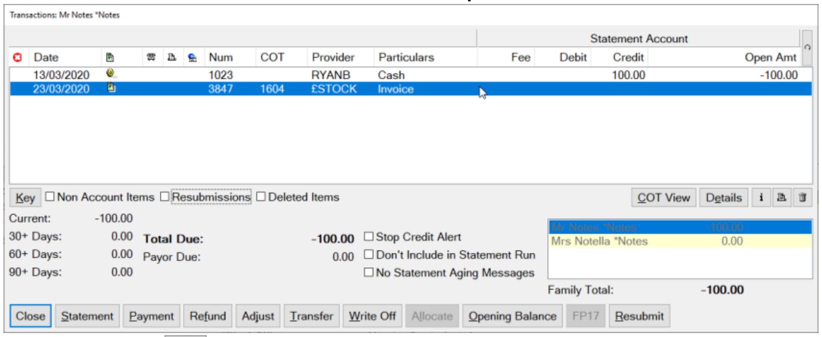
Estimates

You can view a video guide using the link below:

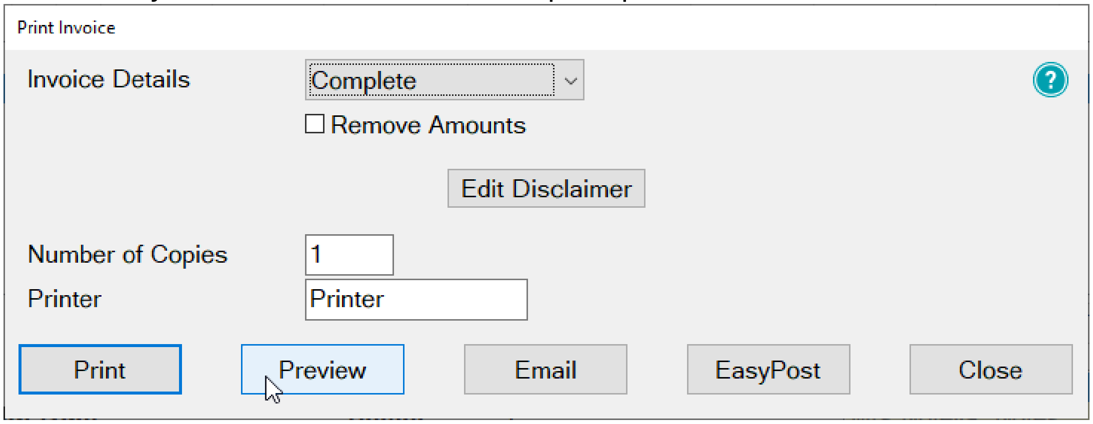
https://www.youtube.com/watch?v=supN2BLEf3A

Printing Invoices

1. To print an invoice click on the € button on the patients tool bar
2. Click on the invoice line for that the patient needs



3. Click on the icon under the transaction window on the right hand side
4. On the screen below select how to would like to give the patient their invoice
   I. Print – this will print at the practice and you can hand it to the patient
   II. Preview – will allow you to view the invoice before printing
   III. Email – will attach the invoice to an email as a PDF
   IV. EasyPost – will send a letter out top the patient.



5. Your estimate will contain the patients name and address and any items which have been charged through under that invoice line.

MANAGING OPEN COTs

Care Manager

You can view a video guide using the link below:

https://www.youtube.com/watch?v=uvpU10fjsdY&t=2s

List Outsanding 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.

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

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

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

To run the 'Outstanding Treatment' Report

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

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

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

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

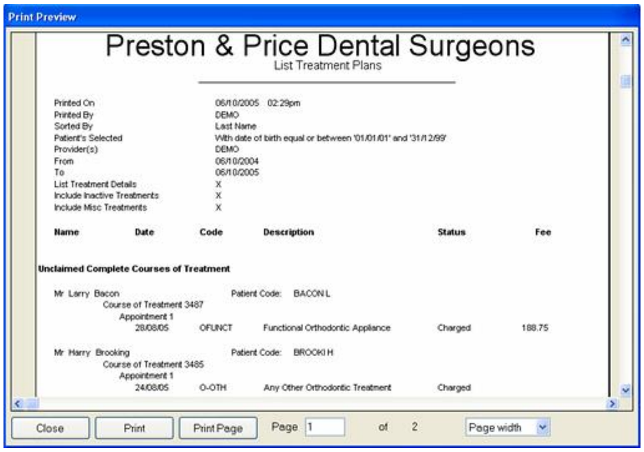
4. Optionally select a **Provider** from the list by clicking in the field and using the button. The report will then print for the selected provider only.
   Use the **Multiple** button ito select more than one provider.
5. Alternatively, you can select a **Provider Category** rather than one or more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

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

Report Output

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

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



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

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

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

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

PATIENT COMMUNICATIONS

Presentation Manager

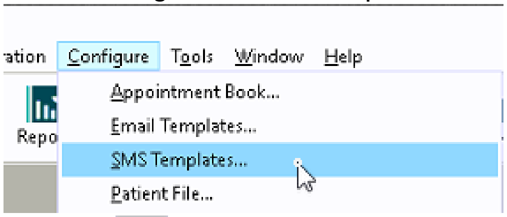
You can view a video guide using the link below:

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

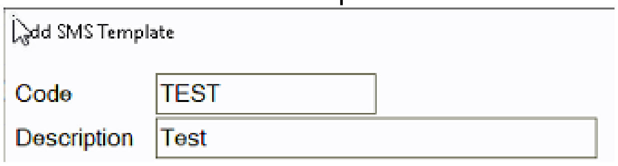
SMS

How to add SMS template

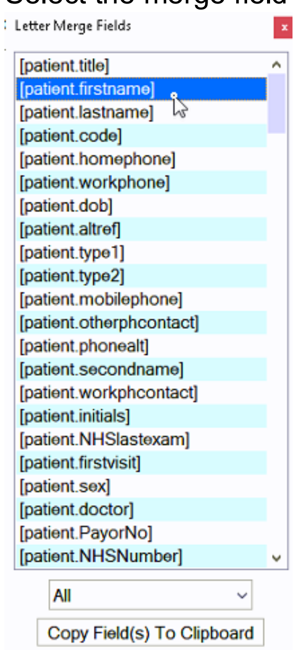
1. Go to Configure > SMS templates



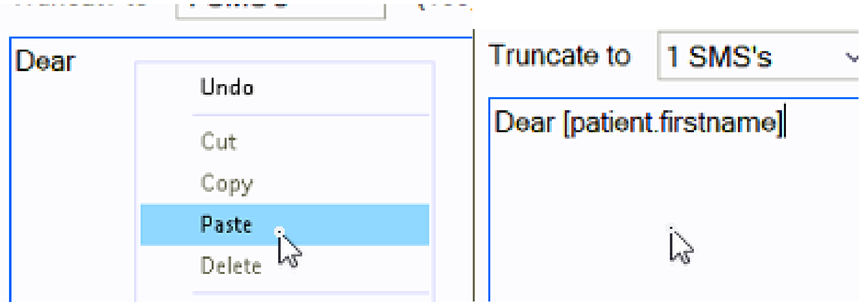
2. Click on +1 from the toolbar
3. Enter a code and a description. Please note: the code needs to be unique



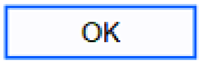
4. Type your message into the available field.
5. To automatically pull information from the patient file click on View Merge Fields at the bottom left of the window and it will open the 'Letter Merge Fields' window
6. Select the merge field you need then click on 'Copy Field(s) to Clipboard'



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



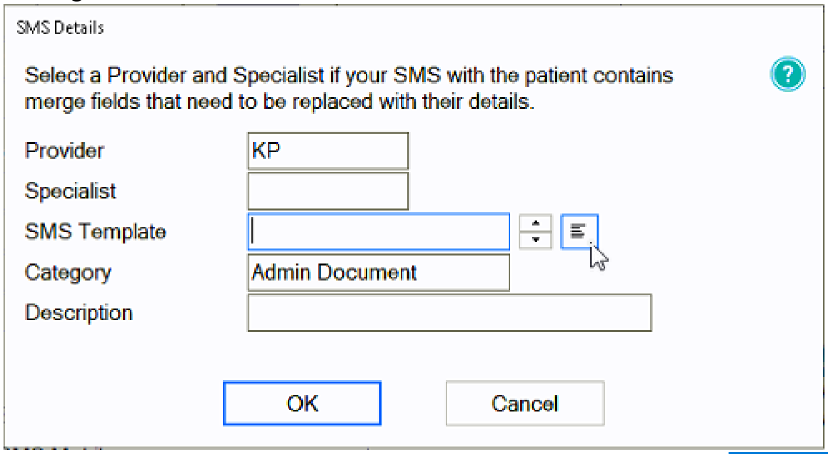
8. A single SMS is 160 characters long – if the template you create is longer than 160 characters you will need to change the truncate option to as many texts as you need.

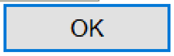
9. Once you have finished your template click 

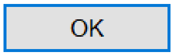
How to contact patients by SMS

1. Go to the patients file that you wish to send an SMS to
2. Click on the  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



4. Select the email template from the list and then click on 

5. Click 

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 

and the SMS will go to your patient. Any SMS sent will be stored in the ‘Contacts’ tab.

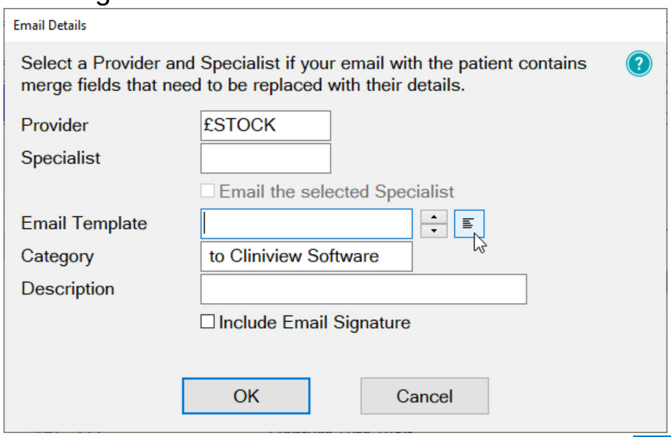
Email

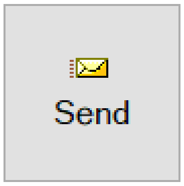
How to add email templates

You can view a video guide using the link below:

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

How to contact patients by email

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

4. Select the email template from the list and then click on OK
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 00441634 266 800

Department of Employment Affairs and Social Protection

Phone numbers: 01 704 3000

Emails: info@welfare.ie

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

Eligibility checker

Please use the link below to check a patients eligibility by treatment code.

https://www.sspcrs.ie/portal/dentchecker/pub/check

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