TRAINING WORKSHOPS XDENT

DentalWize

MAY 2022

DentalWize XDENT Training Manual for Receptionist and Admin

INDEX

NOTE:

For the purpose of this training session, sections in this manual have been extracted from the extensive training manuals. All source documents are referenced and can be accessed at www.cgm.com/za-xdenttraining or by scanning the QR code below.

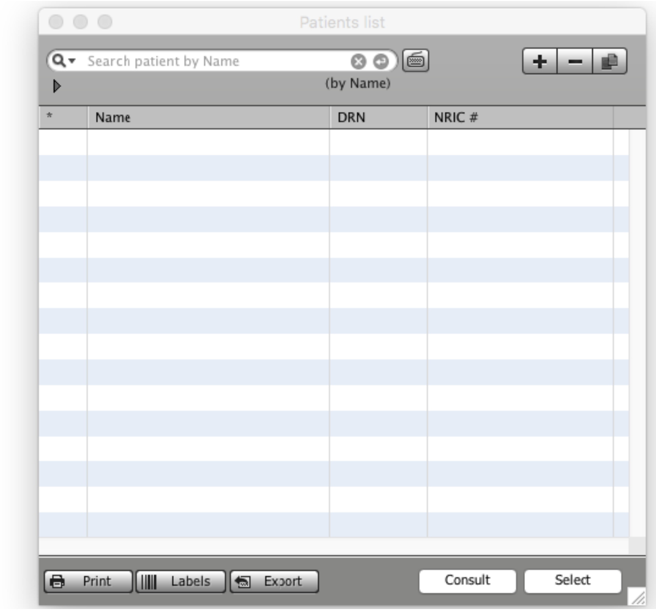
Scan for full training manuals

1. Creating / Registration of Patients

TRAINING GUIDE REFERENCE: Page 4 / XDENT Quick User Guide v0.9_20160317

How do you create a patient?

Click on Patients place a button on the toolbar and press “+” then enter the data.



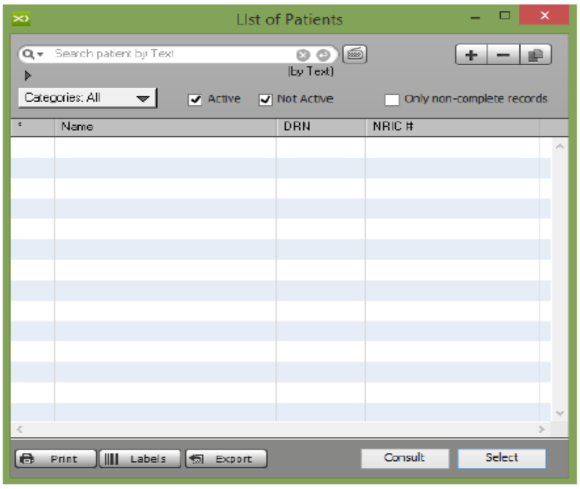
TRAINING GUIDE REFERENCE: Page 27 / XDENT_User_Guide_v1_2

7. PATIENTS

The patient list contains the list of patients present in XDENT and search mechanisms that are very powerful. To view patients in the database, press the Enter key on your keyboard, Use the appropriate search field to filter the patients to be displaced based on the “Name’’ value or any other search. Each time you press a keyboard character; Search is activated on that part of the display name.

Take note that setting search value as “Text ‘’at the dropdown on the magnifying glass allows you to search all fields.

To open a patient record, you must search for it, select and click ‘’View’’ or Double Click on the name of patient show in the the list.



Practice patients

The list of the patients managed by XDENT is accessible through *Patients List that* allows you to find, add, delete,browse, duplicate, print and export patients' data.

Find function can be activated through "ENTER" or by clicking on the corresponding icon, placed on the right of the Lookup Field. If the Lookup Field is left empty, all the patients are viewed in the personal data field; otherwise the search is filtered through the selected key search and what is written in the Lookup Filled.

The patients list can be viewed both as a table and as a *FORM* also displaying the patient photo and the phone details for instant VoIP call. Select your choice from Settings.

2. Searching for Patients

TRAINING GUIDE REFERENCE: Page 38 – 42 / Full Guide_XDENT_English_Clinical

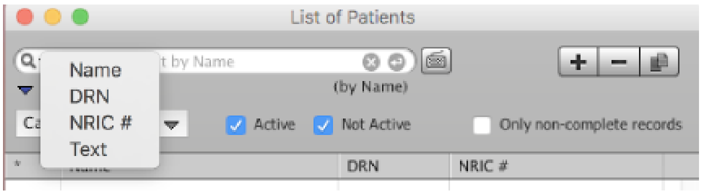
Search Filters

Once you have set the search parameters of a working session, these are stored for the next use of XDENT. In this way, the type of search filters (surname, name, text, …) or interest categories, usually used, do not need to be set again every time XDENT restarts. In addition to the filters Through personal data, there is also a filter that narrows the search of the patients according to their associated category.

In order to access the categories filter, click on the arrow under the Lookup Field in the patient list window. If you click on the filter, you can select one or more categories in order to view all the patients included.

The categories filter takes into account all the categories specified in the patient's records.

In the table layout (that can be activated from Setting Patients record), were the column displayed in the can be customized, the window can be set both Horizontally and Vertically.



Search in the Patients List

The search parameter int the patients list can be set by surname, name code, phone number or text as shown in Figure.

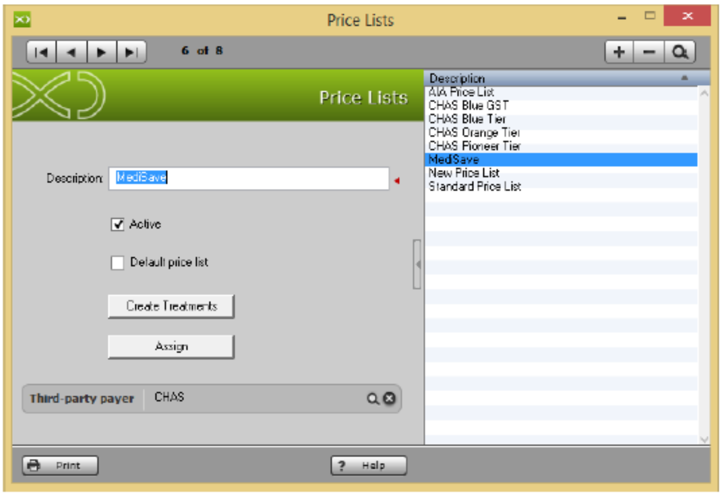
3. Linking Price Lists

TRAINING GUIDE REFERENCE Page 114 / XDENT_User_Guide_v1_2

How to Add/Edit/Delete Price List in XDENT?

The clinica can modify the price list for the treatments and adapt them from existing lists by clicking “assign” it will copy the treatment record from the other pricelist to the selected price list or create a new pricelist with a blank record and you can select Price list as Default.

To make changes to a Price list, access the Treatments and then Price list.



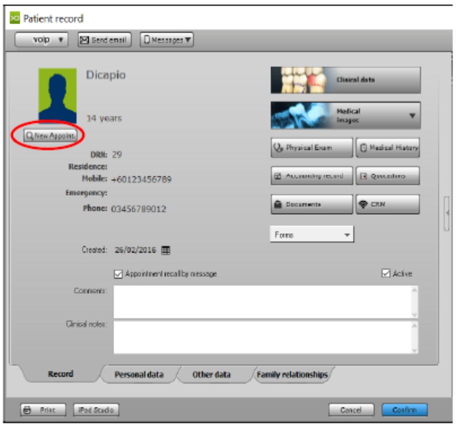
4. Navigating the Agenda (Calendar)

TRAINING GUIDE REFERENCE Page 5 / XDENT Quick User Guide v0.9_20160317

How do you fix a new appointment for a patient?

Open the patient's record, press the "New Appoint." button. Double-click on the time of the day of interest. Here you can indicate all appointment details.

See details in section PLANNING WEEKLY/DAILY



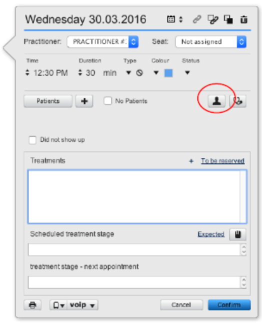
TRAINING GUIDE REFERENCE Page 13 / XDENT Quick User Guide v0.9_20160317

The weekly/daily planning is done in the Agenda of the clinic and presents various display options:

- **Planning Practitioner:** used to manage the appointments of an individual doctor.
- **Planning Multi-practitioners**: used to view and manage agendas simultaneously for more doctors.
- **Planning Practices**: used to manage appointments in relation to shared resources: XRAY Rooms, Dental Chairs, Other Rooms, etc.

Depending on the type of clinic organizations choose the desired planning. The window Weekly/Daily Planning is displayed at the time intervals of 15 minutes that allow the assignment of appointments (configurable option in the preferences).

To Insert a new appointment, double-click with the mouse on the time match desired, It opens a detailed of window ''appointment'' that lets you choose the patient among those in the database through the ''Patients'' button or enter a new one using the ''+'' button. You can also specify the duration of the appointment and performance planned, i.e. The type of treatment to be performed on the patient. From the appointment window, you can go directly to a patient's record through the appropriate button "Patient Record''.

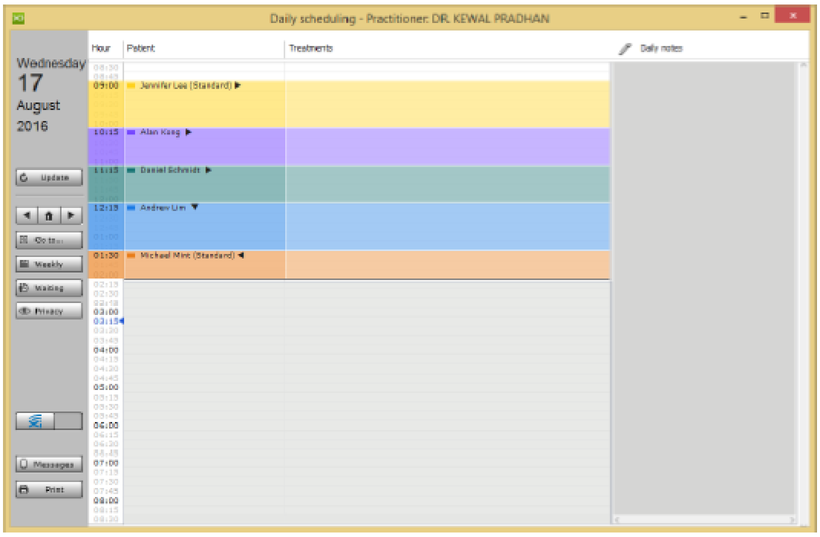


8.2 Daily Scheduling

How to view Daily Schedule of Practitioner in XDENT?

Go to Agenda > Daily Scheduling

This will show the daily schedule of individually selected practitioners.



TRAINING GUIDE REFERENCE Page 64 – 67 / Full Guide_XDENT_English_Clinical

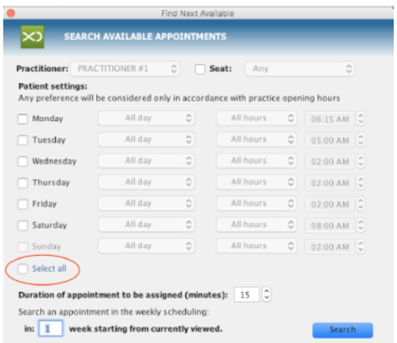
Searching for a new appointment

Through function 'search for a new appointment; specific hours and time ranges in which a patient is available for an appointment can be defined, obviously based on practice needs and the possible duration of the appointment.

If a patient has no preferences, check box *select all* can be used to enable or disable all days in this one click.

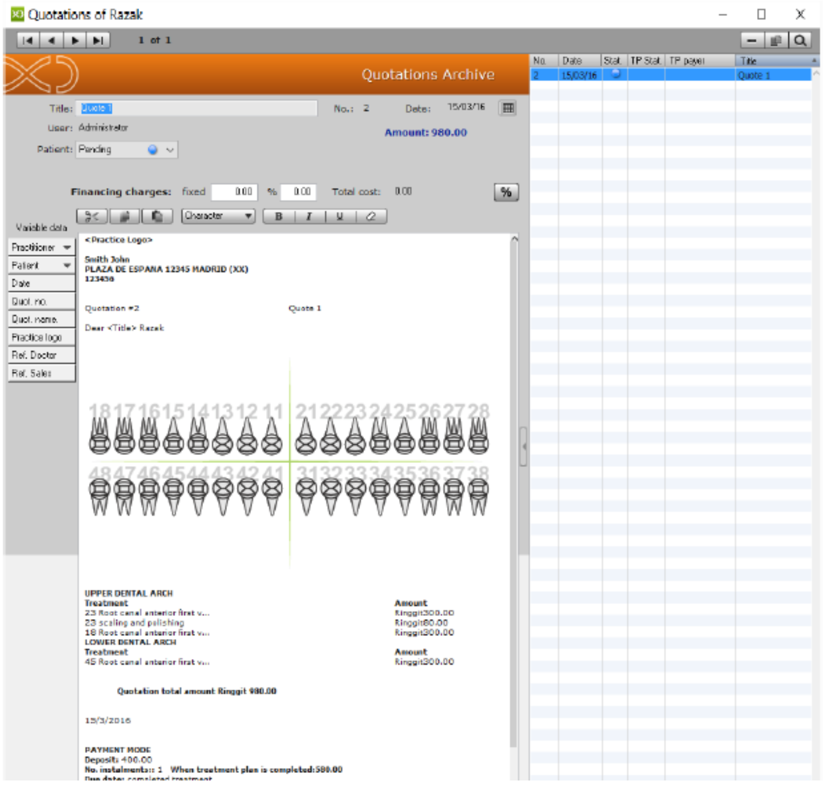
Tip

XDENT saves the last selection. Therefore, if assigning several appointments in a row is desired, conveniently configure the search parameters and assign the first appointment in the scheduling accordingly. By recalling the *New Appointment* function, a research starting from the first appointment assigned with the parameters already selected the first time activated.



5. Quotes

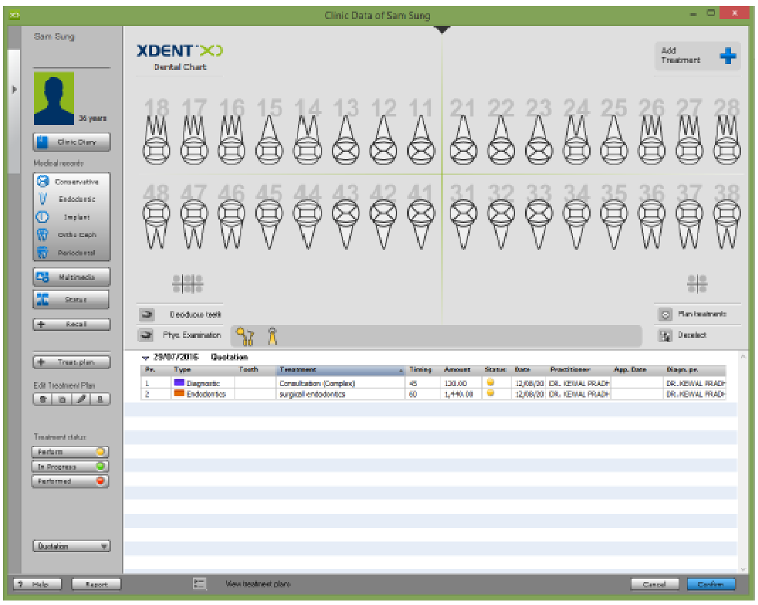
TRAINING GUIDE REFERENCE Page 17 / XDENT Quick User Guide v0.9_20160317



TRAINING GUIDE REFERENCE Page 61 – 65 / XDENT_User_Guide_v1_2

How to issue a Quotation for a Treatment Estimation to Patients in XDENT?

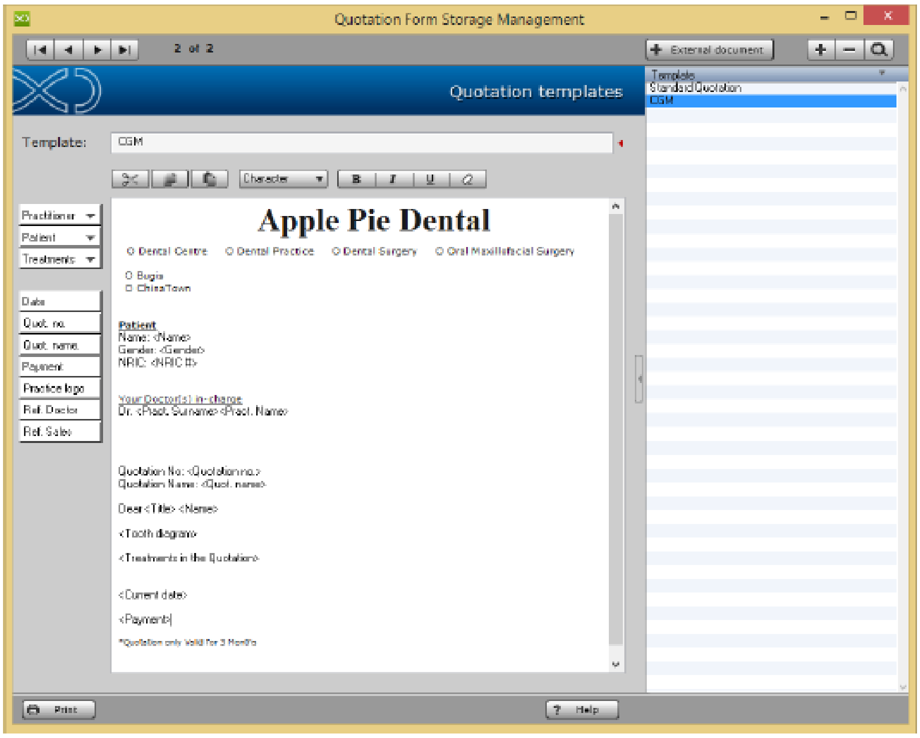
The QUOTATION contains all the patients estimates, and from here the Practitioner can generate a cost estimate for the patient with the agreed upon payment terms, change the state of each of them and eventually eliminate them or duplicate them to adduce changes. The Practitioner must create a NEW Treatment plan and ADD treatment then click Quotation Button on left bottom.



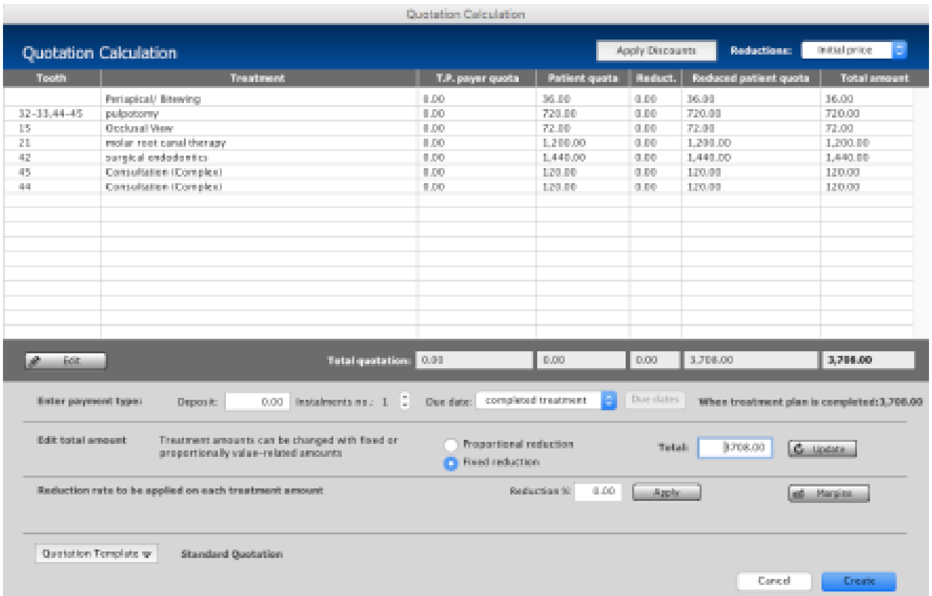
How to Create/Add/Edit/Delete Quotation Form in XDENT?

Documents > Quotation Form

Clinic able to Create/Add/Edit/Delete quotation form in this form module, Form field variable are available to select the field from the XDENT Database.



TRAINING GUIDE REFERENCE: Page 59 – 63 / Full Guide_XDENT_English_Clinical

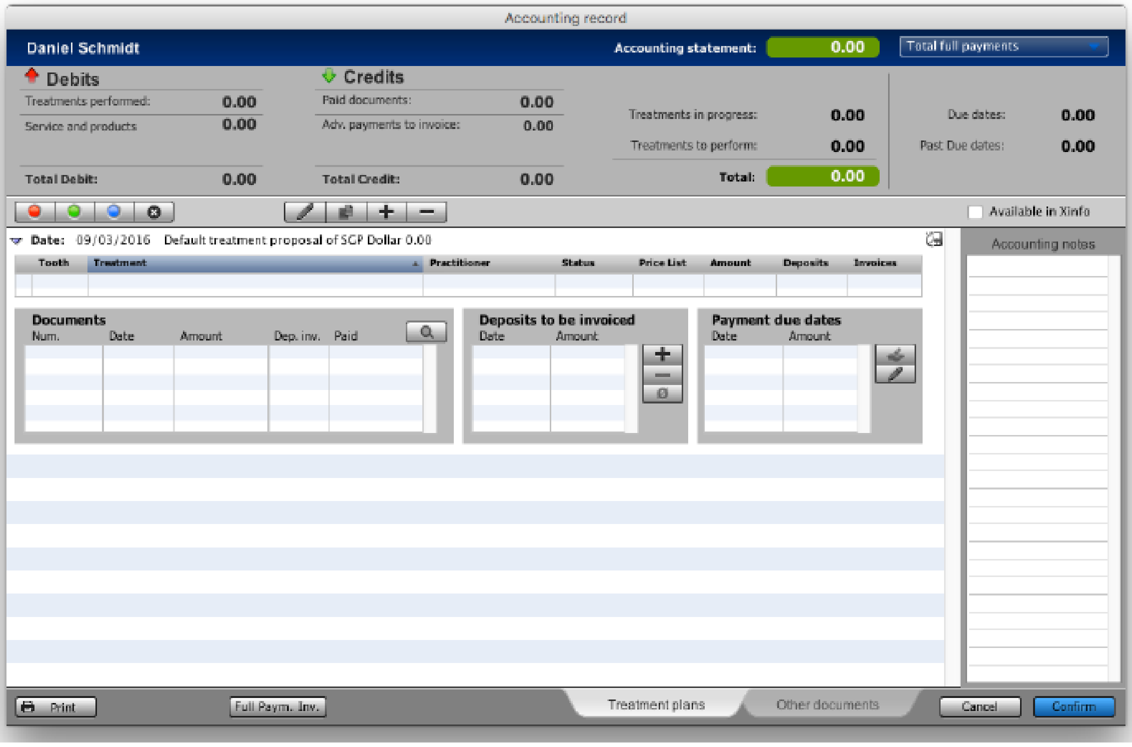


6. Billing and Invoicing

TRAINING GUIDE REFERENCE: Page 7 / XDENT Quick User Guide v0.9_20160317

How do you issue an invoice?

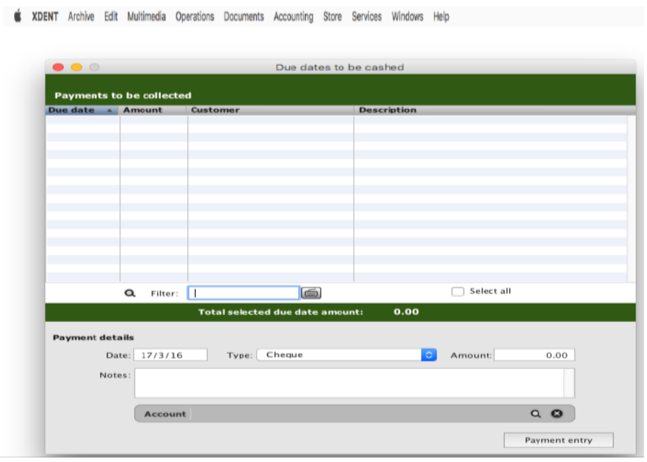
Open the patient's record, and press the "Accounting Record" button. Then choose whether to issue a Deposit invoice or to invoice performed treatments. To invoice performed treatments, you need to select the treatments to invoice from the treatment plan in the Accounting Record and click "Full Paym.Inv."



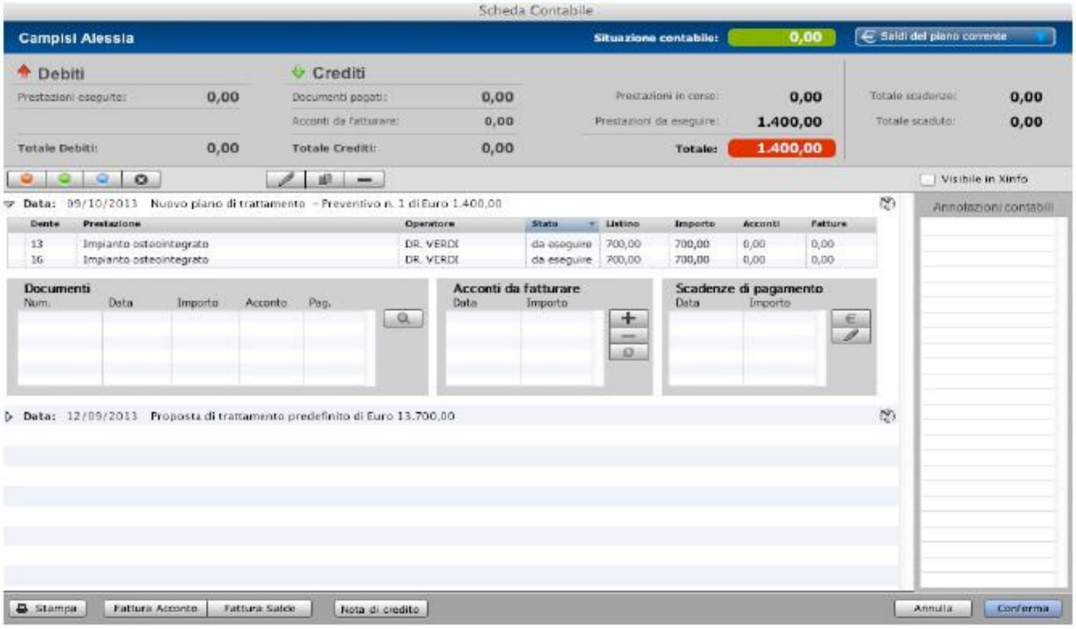
TRAINING GUIDE REFERENCE: Page 8 / XDENT Quick User Guide v0.9_20160317

How do you register a payment of an invoice?

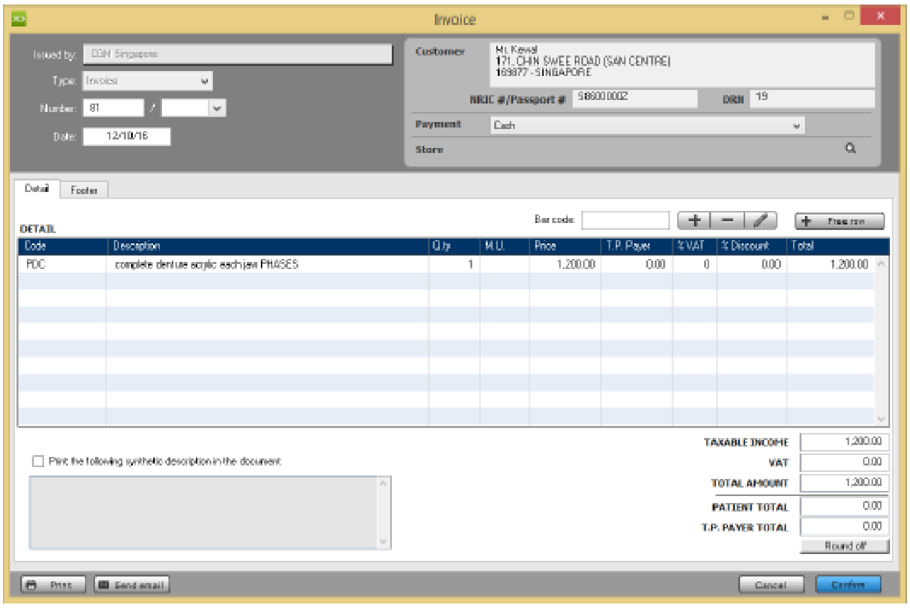
Go to the menu bar, click "Accounting" - followed by "Credit Collection"



TRAINING GUIDE REFERENCE Page 18 / XDENT Quick User Guide v0.9_20160317



TRAINING GUIDE REFERENCE Page 141 – 144 / XDENT_User_Guide_v1_2



7. Reports

TRAINING GUIDE REFERENCE: Page 24 / XDENT Quick User Guide v0.9_20160317

This function is accessible from the toolbar or from REPORT menu and allows you to obtain statistical information on the doctor's clinic. Such a tool is crucial for obtaining useful information to the economic management of the study.

The reports are divided into:

- Accounting
- Purchase
- Medical History
- Appointments
- Patients
- Stock

All reports can be applied to any period of interest by selecting the date of start and end date compared to what you want to get the results.

Reports can also be obtained in graphic form and results can be exported to Excel data sheets for a possible post-process.

TRAINING GUIDE REFERENCE: Page 1 – 7 / XDENT Suggested Reports (all main reports)

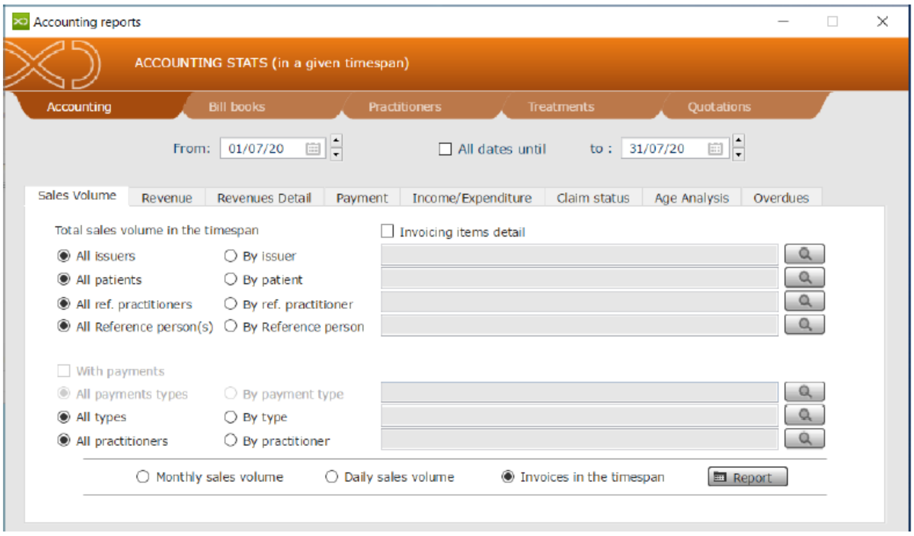
Suggest Day End reports

Patients Invoiced Report (Summary)

Function: To have a list of patients invoiced for a specific Day OR a Specific Date containing a summary of the invoiced totals.

Location: Report > Accounting Reports > Accounting Tab > Sales Volume option

Leaving all selections as default just update the "From:" and the "To: dates as required.



TRAINING GUIDE REFERENCE: Page 7 / XDENT Suggested Reports document (Age Analysis report only)

Suggested Month End reports

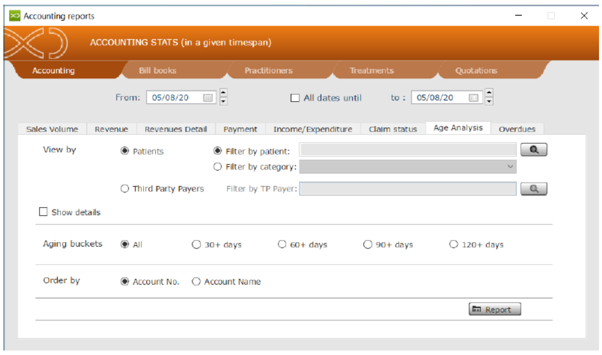
Age analysis (Summary)

Function: To get a list of all 30,60,90,120+ days outstanding accounts.

Location: Report > Accounting reports . Accounting Tab . Age Analysis option

Leaving all selections as default this will give you a summarised report on the patient account aging.

For more details as to what treatments are still outstanding select the “Show Details”



TRAINING GUIDE REFERENCE Page 155 – 156 / XDENT_User_Guide_v1_2

16. REPORT

Pending

This function is accessible from the toolbar or from REPORT menu and allows you to obtain statistical information on the doctor’s clinic. Such a tool is crucial for obtaining useful information to the economic management of the study.

The reports are divided into:

- Accounting
- Purchase
- Medical History
- Appointments
- Patients
- Stock

All reports can be applied to any period of interest by selecting the date of start and end date compared to what you want to get the results. Reports can also be obtained in graphic form and results can be exported to Excel datasheets for a possible post-process.

16.1 Accounting Reports

16.2 Purchase Reports

16.3 Medical History Reports

16.4 Appointment Reports

16.5 Patient Reports

16.6 Stock Reports

TRAINING GUIDE REFERENCE: Page 121 – 126 / Full Guide_XDENT_English_Clinical