



TRAINING WORKSHOPS XDENT



MAY 2022

**DentalWize XDENT Training Manual
for Super Users**

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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.



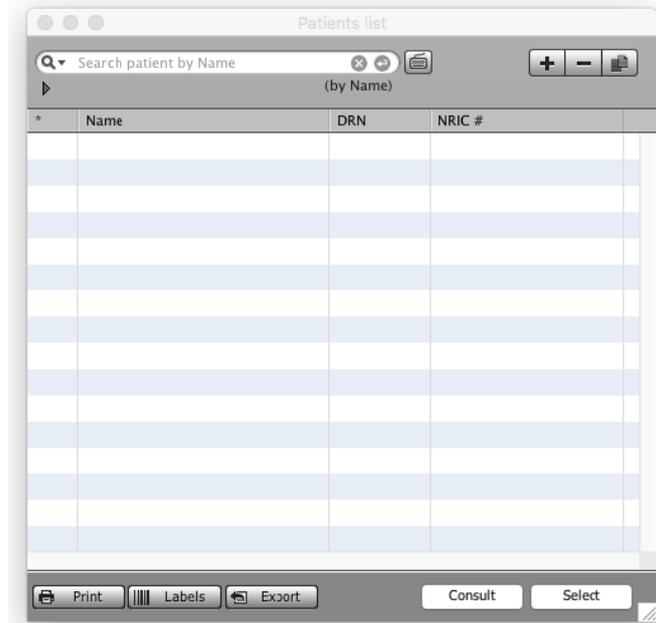
Scan for full
training manuals

1. Creating / Registration / Patients

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

How do you create a patient?

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



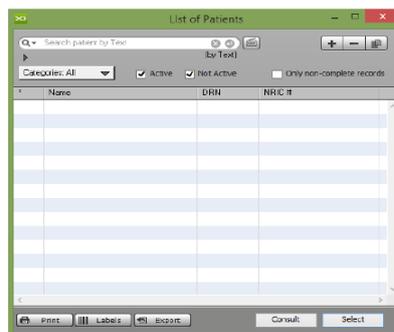
TRAINING GUIDE REFERENCE: Page 27 / XDENT_User_Guide_v1_2

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 as 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 field.

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

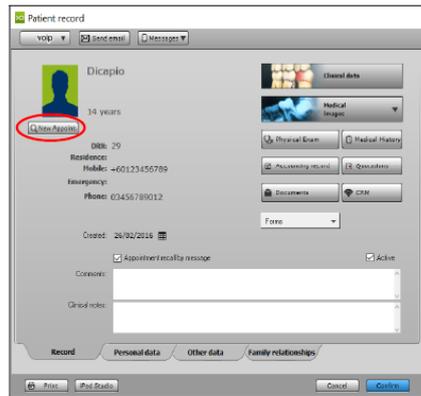
3. Navigating the Agenda (Calendar)

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:

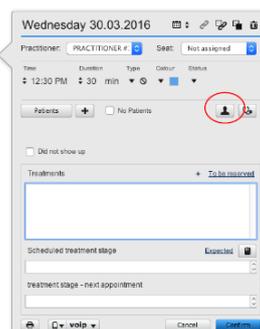
- **Planning Practitioner:** used to manage the appointments of an individual doctor.
- **Planning Multi-practitioners:** used to view and manage agendas simultaneously for more doctors.
- **Planning Practices:** used to manage appointments in relation to shared resources: XRAY Rooms, Dental Chairs,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

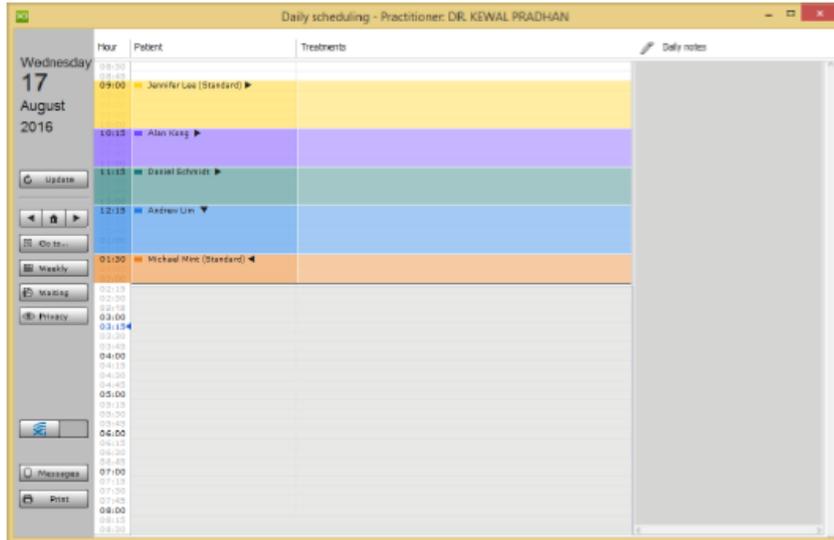


8.2 Daily Scheduling

How to view Daily Schedule of Practitioner in XDENT?

Go to Agenda > Daily Scheduling

This will show the daily schedule of individually selected practitioners.



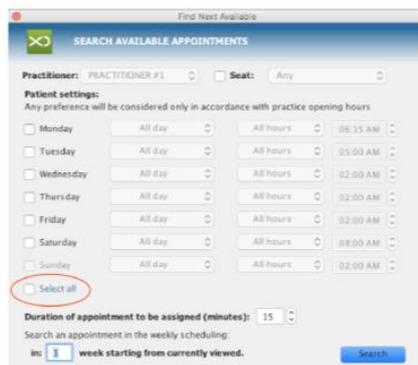
TRAINING GUIDE REFERENCE: Page 64 – 67 / Full Guide_XDENT_English_Clinical

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.

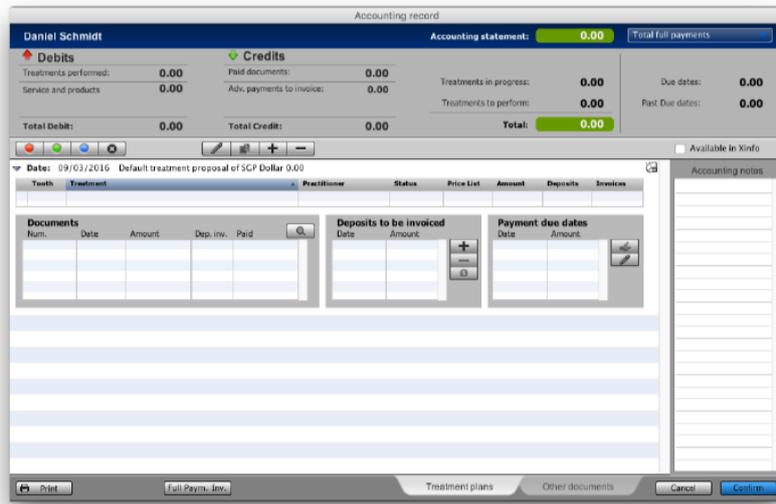


4. Billing and Invoicing

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

How do you issue an invoice?

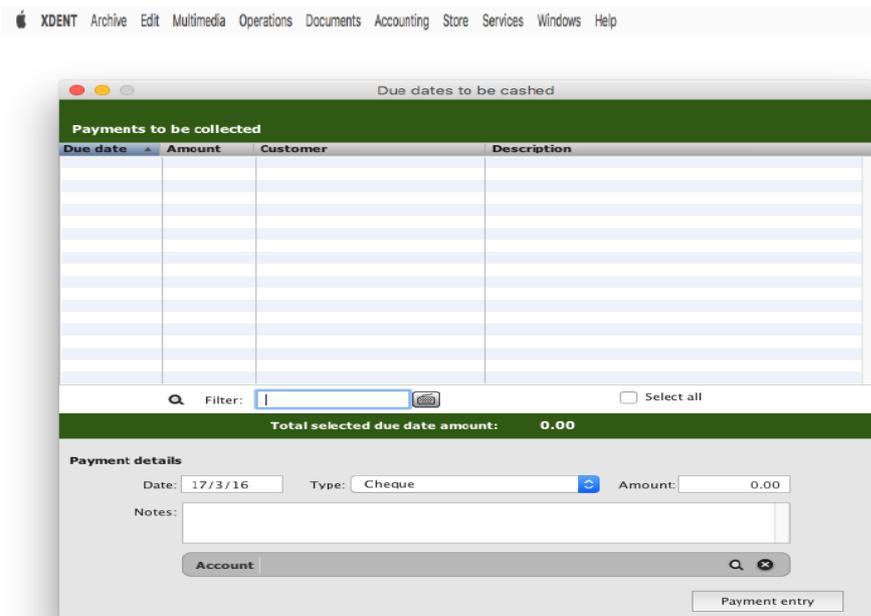
Open the patient's record, and press the "Accounting Record" button. Then choose whether to issue a Deposit invoice or to invoice performed treatments. To invoice performed treatments, you need to select the treatments to invoice from the treatment plan in the Accounting Record and click "Full Paym.Inv."

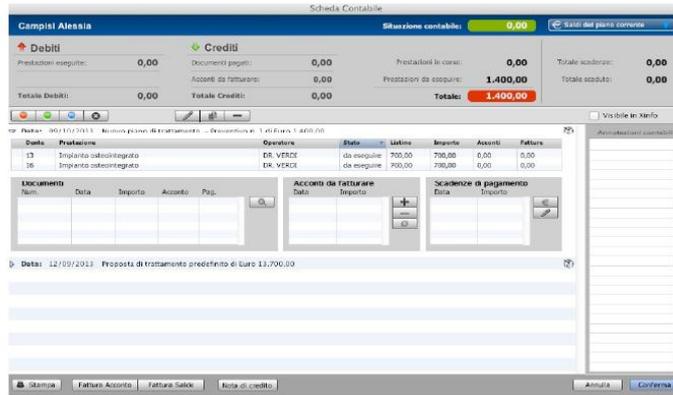


TRAINING GUIDE REFERENCE: Page 8 / XDENT Quick User Guide v0.9_20160317

How do you register a payment of an invoice?

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

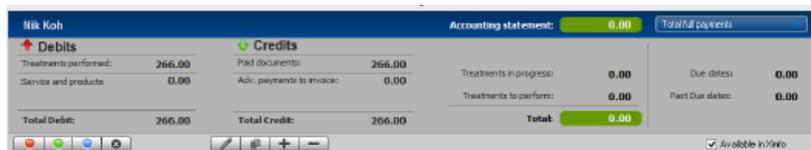




14. ACCOUNTING

Accounting record represents the main tool to obtain patient-related information in terms of profits and treatments provided at the practice.

For each treatment, the relevant total amount and collected amount are provided. The accounting situation of the patient is displayed against a blue background in the upper portion of the record. The total amount is displayed against a red background if the patient is in debt, otherwise against a green one in credits. All total amounts in the accounting record refer either to the treatment plan currently selected in the plan list or to the accounting record in its entirety.



Invoicing Preferences

To issue invoices, there are some options that can be set from preferences "Accounting record.

Concise description to be mentioned in the invoice: If it exceeds the length of a row, it automatically continues in the following line, which is repeated during formatting

Invoicing notes can be customized, with the possibility to enter what are relevant notes.

The screenshot shows the 'Xdent - Settings' window with the 'Accounting Data' tab selected. The 'Invoicing' section is visible, containing the following options:

- Invoicing Issue:**
 - with detailed description
 - with concise description
 - Summary invoice
 - Show total in invoices list
- Synthetic description to be reported in the invoice:** Dental treatments
- Invoicing type:**
 - Receipt
 - Invoice
 - Deduce stamp duty in the invoice
 - Show rows in the invoice
 - Do not allow non-treatment-related invoices
- Characters after invoice (i.e. 147/A):** CGM XDENT (Default issuer)
- Items to be reported in the invoice:**
 - Logo: Select (You can add a logo and/or text as an image file that will be placed TopRight on the print form. -select the logo in a jpeg, gif or png file or empty the field if you don't want to print any logo. The logo must cannot exceed 110x250 pts (height and width). If the image size is too large, it will be proportionally resized.)
 - Notes: (Empty text area)
 - Stamp Duty virtually paid
- Logo place on the print form:** Left Right
- Profit assessment:**
 - Profit margin: 50.00 %
 - Risk management: 500.00 Fixed
 - Taxation: 0.00 Fixed
- Alert for Time and cost record: NOT COMPLETED

5. Claim Submissions

TRAINING GUIDE REFERENCE: CGM XDENT Claim Submissions.pdf

Accounting record

Recording Demonstration Main Member > All Accounting statement: **7,415.14** Full payments of a plan

Debits		Credits		Due dates:		Accounting notes
Treatments performed:	8,877.82	Paid documents:	1,462.68	Past Due dates:	0.00	
Service and products:	0.00	Adv. payments to invoice:	0.00	Treatments in progress:	0.00	
				Treatments to perform:	905.56	
Total Debits:	8,877.82	Total Credit:	1,462.68	Total:	8,320.70	

Date: 10/05/2022 Claim Submissions and Remittance Demo Available in Xinfo
 Patient: Recording Demonstration Main Member of ZAR 257.79

Tooth	Code	Treatment	Practitioner	Status	Price List	Amount	T.R. quota	Adv. paym.	Invoices	Diag. Code	Place of services
	8145	Local anaesthetic - per visit	COSMETIC & DENT	10/05/202	62.03	62.03	0.00	0.00	0.00		Consulting Room
	8101	Oral examination	COSMETIC & DENT	10/05/202	158.91	158.91	0.00	0.00	0.00	200.0	Consulting Room
	8110	Sterilized instrumentation	COSMETIC & DENT	10/05/202	36.85	36.85	0.00	0.00	0.00		Consulting Room

Documents				Claims				Deposits to be invoiced		Payment due dates	
Num.	Date	Amount	Paid	Num.	Date	Status	Amount	Date	Amount	Date	Amount

- Date: 06/04/2022 Treatment plan from physical examination
 Patient: Recording Demonstration Main Member of ZAR 3,399.31
- Date: 15/03/2022 Demo of 2x visits treatments
 Patient: Recording Demonstration Main Member of ZAR 589.28
- Date: 15/03/2022 Treatment plan from physical examination
 Patient: Recording Demonstration Main Member of ZAR 503.01
- Date: 11/03/2022 New treatment plan
 Patient: Recording Demonstration Main Member of ZAR 500.00

Date: 01/06/2023 Crown implant

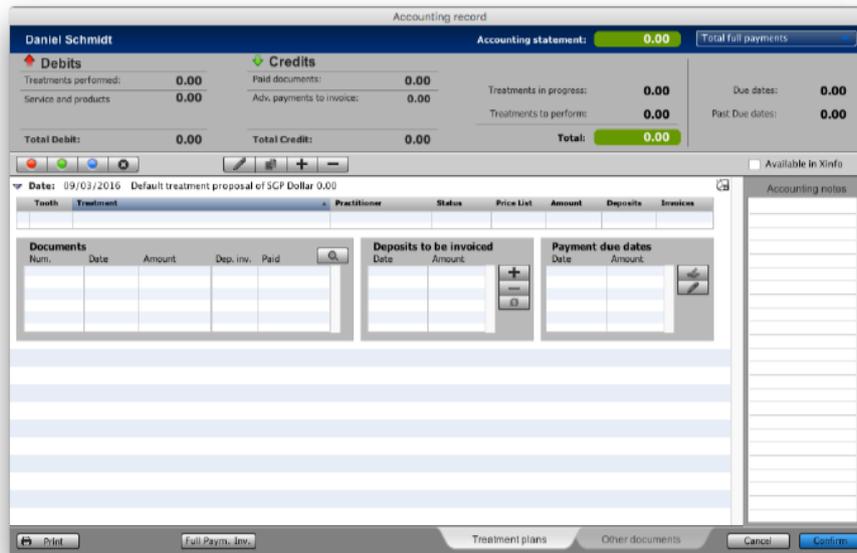
Acc. Statement Print Full Paym. Inv. **Submit Claim** Treatment plans Other documents Cancel Confirm

6. Payments

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

How do you issue an invoice?

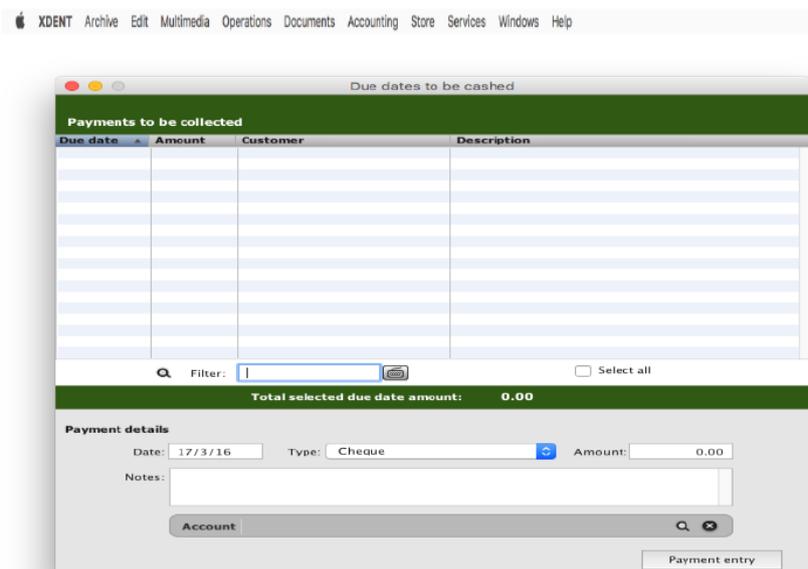
Open the patient's record, and press the "Accounting Record" button. Then choose whether to issue a Deposit invoice or to invoice performed treatments. To invoice performed treatments, you need to select the treatments to invoice from the treatment plan in the Accounting Record and click "Full Paym.Inv."



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"



Scheda Contabile

Campisi Alessia Situazione contabile: **0,00** [Saldi del piano corrente](#)

Debiti	Crediti	Prestazioni in corso:	0,00	Totale scadenze:	0,00
Prestazioni eseguite: 0,00	Documenti pagati: 0,00	Prestazioni da eseguire:	1.400,00	Totale scadute:	0,00
Accconti da fatturare: 0,00					
Totale Debiti: 0,00	Totale Crediti: 0,00	Totale:	1.400,00		

Data: 09/10/2013 Nuovo piano di trattamento - Preventivo n. 1 di Euro 1.400,00

Dente	Prestazione	Operatore	Stato	Utinio	Importo	Acconti	Fatture
13	Implanto osteointegrato	DR. VERDI	da eseguire	700,00	700,00	0,00	0,00
16	Implanto osteointegrato	DR. VERDI	da eseguire	700,00	700,00	0,00	0,00

Documenti

Num.	Data	Importo	Acconto	Pag.

Acconti da fatturare

Data	Importo

Scadenze di pagamento

Data	Importo

Data: 12/09/2013 Proposta di trattamento predefinito di Euro 13.700,00

Stampa | Fattura Acconto | Fattura Saldo | Nota di credito | Annulla | Conferma

Invoice

Issued by: DGN Singapore

Type: Invoice

Number: 81 /

Date: 12/10/16

Customer: Mr. Kevul
171, CHN SWEE ROAD (S&N CENTRE)
169877 - SINGAPORE

NRIC #/Passport #: S86000002 DRN: 19

Payment: Cash

Store:

DETAIL

Code	Description	Qty	M.U.	Price	T.P. Payer	% VAT	% Discount	Total
PDC	complete denture each jaw PTHSES	1		1.200,00	0,00	0	0,00	1.200,00

Print the following synthetic description in the document

TAXABLE INCOME	1.200,00
VAT	0,00
TOTAL AMOUNT	1.200,00
PATIENT TOTAL	0,00
T.P. PAYER TOTAL	0,00

Print | Send email | Cancel | Confirm

7. Medical Certificates

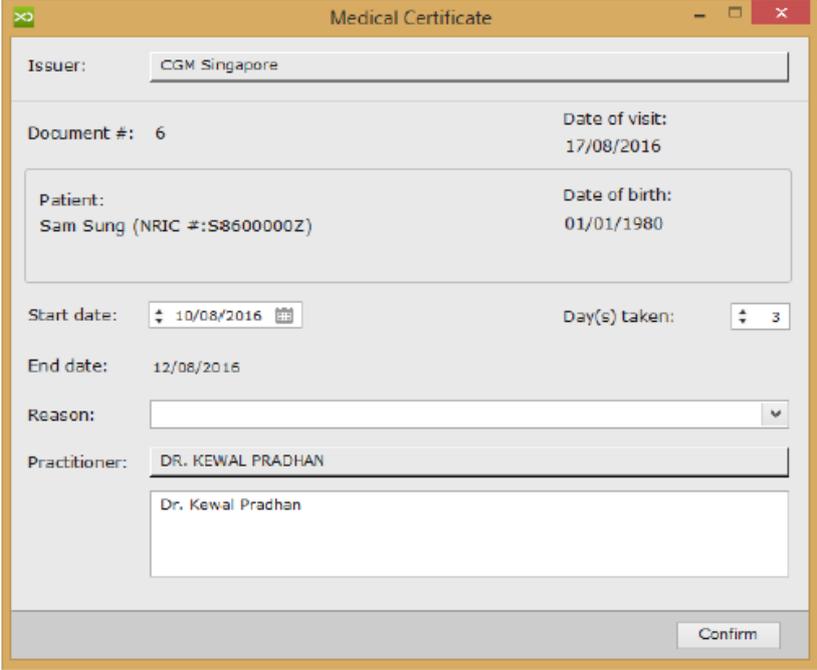
TRAINING GUIDE REFERENCE: Page 81 – 84 / XDENT_User_Guide_v1_2

How to issue Medical Certificate for a Patient in XDENT?

Patient Record > Medical Certificate

MEDICAL CERTIFICATE will allow you to generate an official Medical leave document for that Patient. After generating the MC, print and the Practitioner is required to endorse it with a signature.

Enter Start Date, Day Taken, and Reason and select Practitioner.



The screenshot shows a web-based form titled "Medical Certificate". The form is organized into several sections:

- Issuer:** A text field containing "CGM Singapore".
- Document #:** A text field containing "6".
- Date of visit:** A text field containing "17/08/2016".
- Patient:** A text field containing "Sam Sung (NRIC #:S8600000Z)".
- Date of birth:** A text field containing "01/01/1980".
- Start date:** A date picker field showing "10/08/2016".
- Day(s) taken:** A spinner field showing "3".
- End date:** A text field containing "12/08/2016".
- Reason:** A dropdown menu that is currently empty.
- Practitioner:** A text field containing "DR. KEWAL PRADHAN".
- Signature:** A large text area containing "Dr. Kewal Pradhan".
- Confirm:** A button located at the bottom right of the form.

13.5 Medical Certificates

How to View and Re-Print Medical Certificate in XDENT?

To View, go to Documents > Medical Certificate

It will show the list of all the Medical Certificate that has been created in XDENT.

To print the MC again, either double click on MC or select the record and click Consult button.

Date	Number	Patient	Practitioner	Void
17/08/2016	7	Sam Sung (NRIC #:S86000002)	DR. KEWAL PRADHAN	
17/08/2016	6	Sam Sung (NRIC #:S86000002)	DR. KEWAL PRADHAN	17/08/2016
20/07/2016	5	Edhi Lin (NRIC H.S7962214E)	DR. KEWAL PRADHAN	
21/07/2016	4	Michael Min (NRIC # S7988834E)	DR. KEWAL PRADHAN	
20/07/2016	3	Kewal (NRIC #S86000002)	DR. KEWAL PRADHAN	
20/07/2016	2	Kewal	DR. KEWAL PRADHAN	20/07/2016
20/07/2016	1	Kewal	DR. KEWAL PRADHAN	26/07/2016

8. Reporting

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

Accounting reports

ACCOUNTING STATS (in a given timespan)

Accounting Bill books Practitioners Treatments Quotations

From: 01/07/20 All dates until to: 31/07/20

Sales Volume Revenue Revenues Detail Payment Income/Expenditure Claim status Age Analysis Overdues

Total sales volume in the timespan

All issuers By issuer

All patients By patient

All ref. practitioners By ref. practitioner

All Reference person(s) By Reference person

Invoicing items detail

With payments

All payments types By payment type

All types By type

All practitioners By practitioner

Monthly sales volume Daily sales volume Invoices in the timespan

Report

Suggested Month End reports

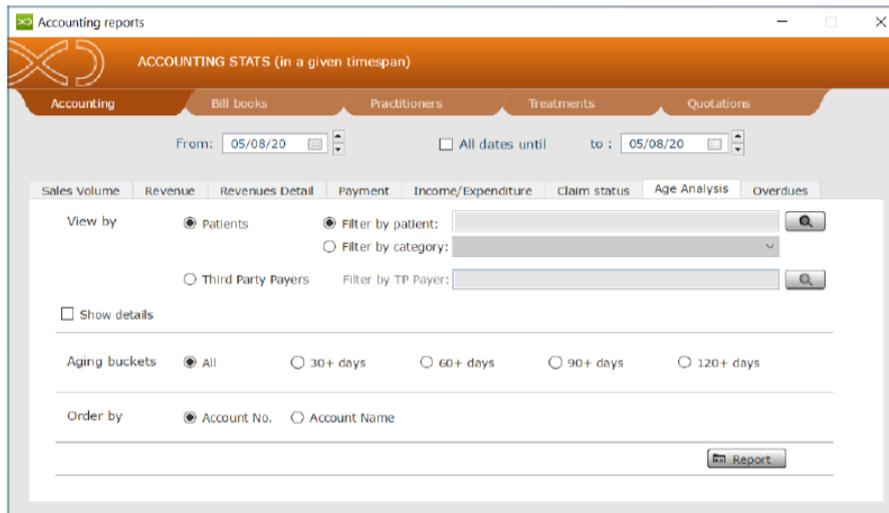
Age analysis (Summary)

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 data sheets 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

The screenshot shows a web-based interface for 'Accounting reports'. The main title is 'ACCOUNTING STATS (in a given timespan)'. Below the title, there are tabs for 'Accounting', 'Bill books', 'Practitioners', 'Treatments', and 'Quotations'. The 'Quotations' tab is currently selected. The interface includes a date range selector with 'From: 19/01/17' and 'to: 19/01/17'. Below this, there are sub-tabs for 'Quotas', 'Treatments', 'Treatments performed', and 'Output'. The 'Quotas' sub-tab is active. The main content area contains the following options:

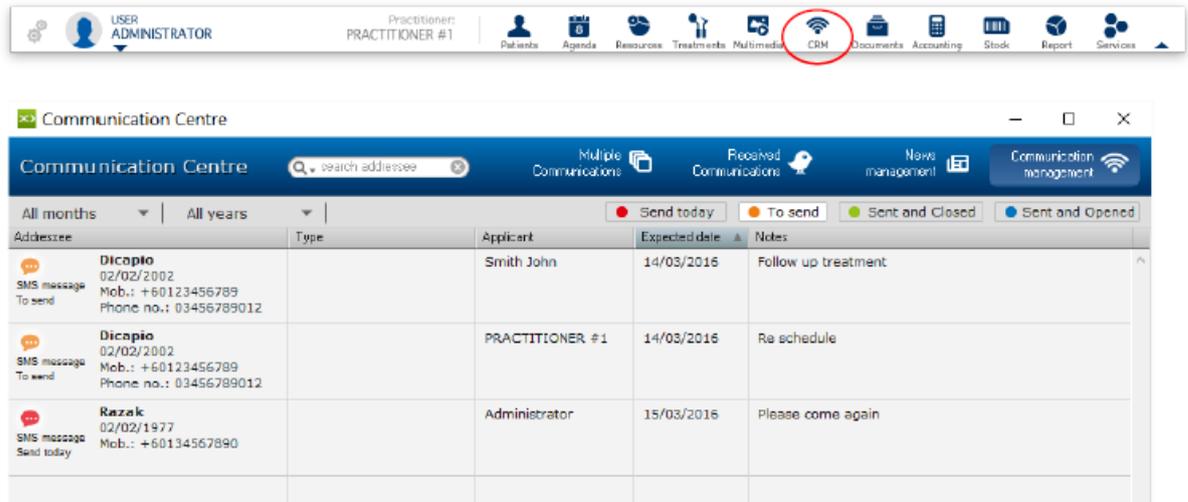
- Calculate quotas for Supervisors, Practitioners, Sales Representatives or Reference Persons in the period**
- All Clinic managers
- All Group Supervisors
- All Practitioners
- All Sales Representatives
- All Reference person(s)
- By single user [text input field]
- Consider also the performed phases
- Calculus on the revenue
- Quota gross of costs
- Quota net of financing costs
- Quota net of total costs
- [Report button]

9. Emails and SMS (Communications / CRM)

TRAINING GUIDE REFERENCE: Page 21 / XDENT Quick User Guide v0.9_20160317

The Callback feature allows you to add automatic patient recalls. You can specify the type of call and XDENT will automatically alert you by the CRM window when a patient is to be recalled. Alternatively, you can schedule automatic SMS or XINFO App reminders to go out.

CRM



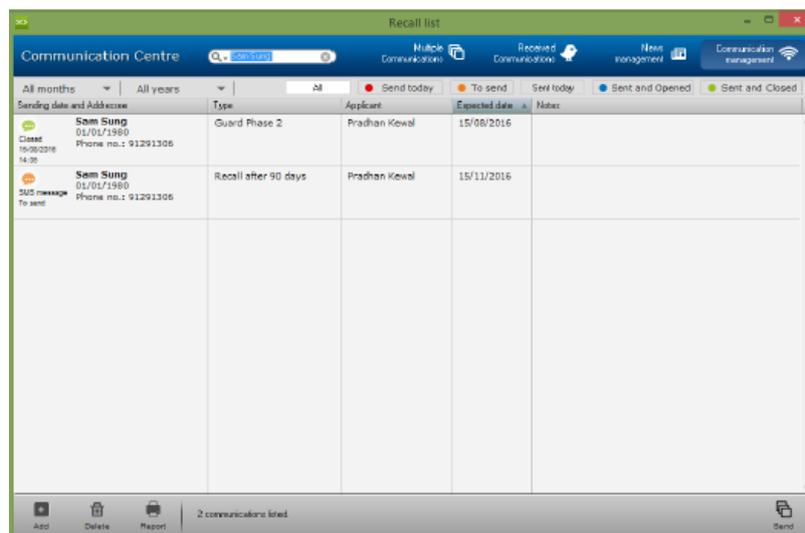
TRAINING GUIDE REFERENCE: Page 70 / XDENT_User_Guide_v1_2

How to View Patient Communication from Patient Record?

Patient Record > CRM

CRM is a communication Center which includes all the CRM functions of the office and therefore manages all the Practice/Patient interaction modes in both communication directions.

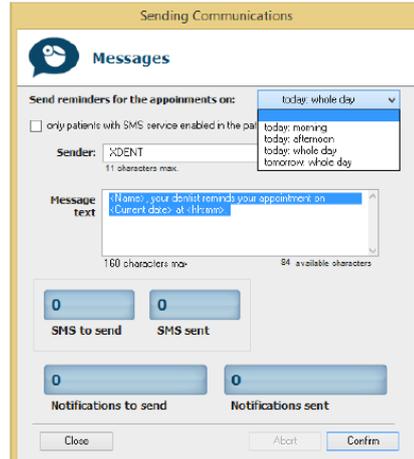
For more detail (Refer # 12.1)



How to send reminder to the Patient for the appointment Scheduled today and next day?

Click the “ message” button of the lower side of Schedule Screen and send a reminder to today and tomorrow-scheduled patients via SMS.

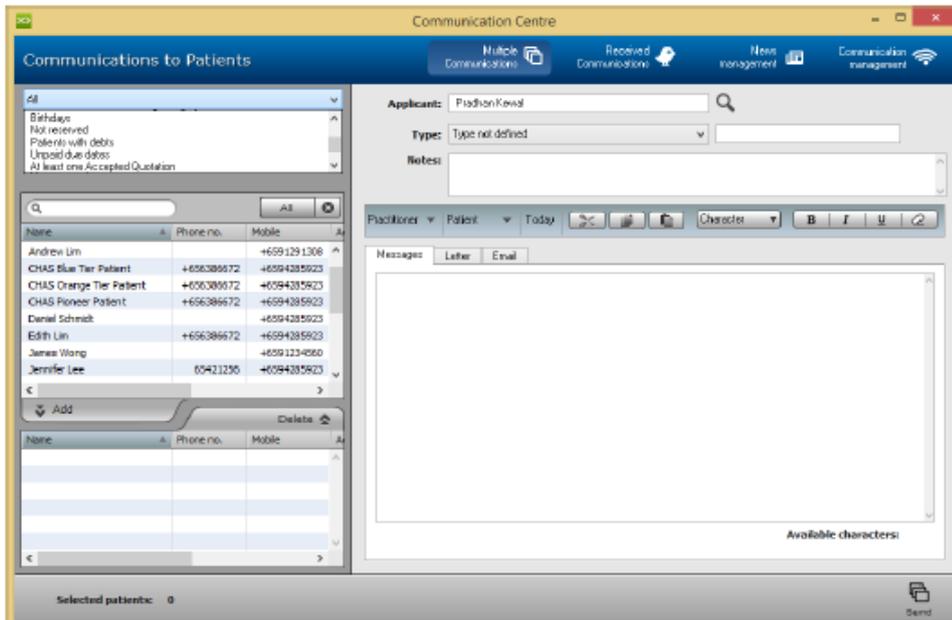
Default message text can be managed from XDENT general setting, under the communication tab (Refer # 4,4)



How to Manage Multiple Communication for a Patient in XDENT?

Communication Centre > Multiple Communication

In the multiple communication, a communication can be sent to more than one selected user based on some default criteria or by manually selecting them.



1. Managing Communications

When a new Communication Centre is opened, all inbound and out bound communications managed by the office are shown for a desired the range.

