XDENT®

Dental Information System

QUICK GUIDE

Synchronizing Healthcare

CompuGroup Medical

INTRODUCTION

The XDENT management software allows managing all aspects of a dental practice fast and conveniently. This quick guide will let you know the basic elements to use and describes the main functions of the software.

XDENT is designed according to the most modern standards of user interfaces, to be used with extreme simplicity and immediacy; therefore, it does not require much time learning. However XDENT is a complete software that can handle all clinic requirements, even the most complex. For a more in-depth knowledge, please read the additional documentation available or request training sessions with our XDENT staff.

This document is organized like a FAQ section that lists the answers useful for a fast start of use, and with a more detailed plan for the SECTIONS relating to the basic functionalities.

FREQUENT QUESTIONS

How do I access XDENT?

Starting for the first time XDENT, you'll be prompted for login credentials: username and password. Enter the user name and the password: **admin.**

To change the access credentials, see the section **users and access rights.**

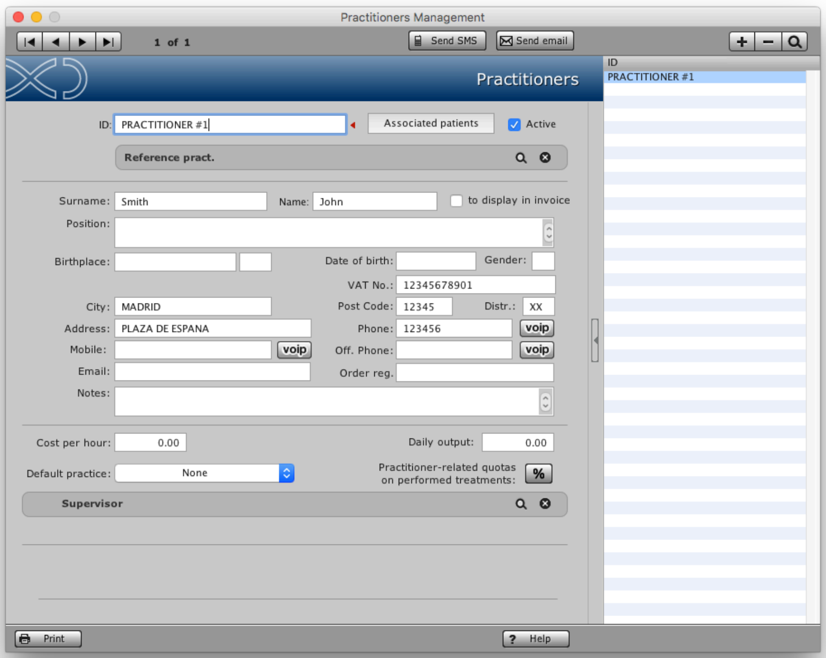
How do I access the functions of XDENT?

XDENT has a menu through which you enable all the features of the software. It also presents a bar of graphic buttons through which you can access the functions most commonly used

How do I set the clinic's Practitioner's?

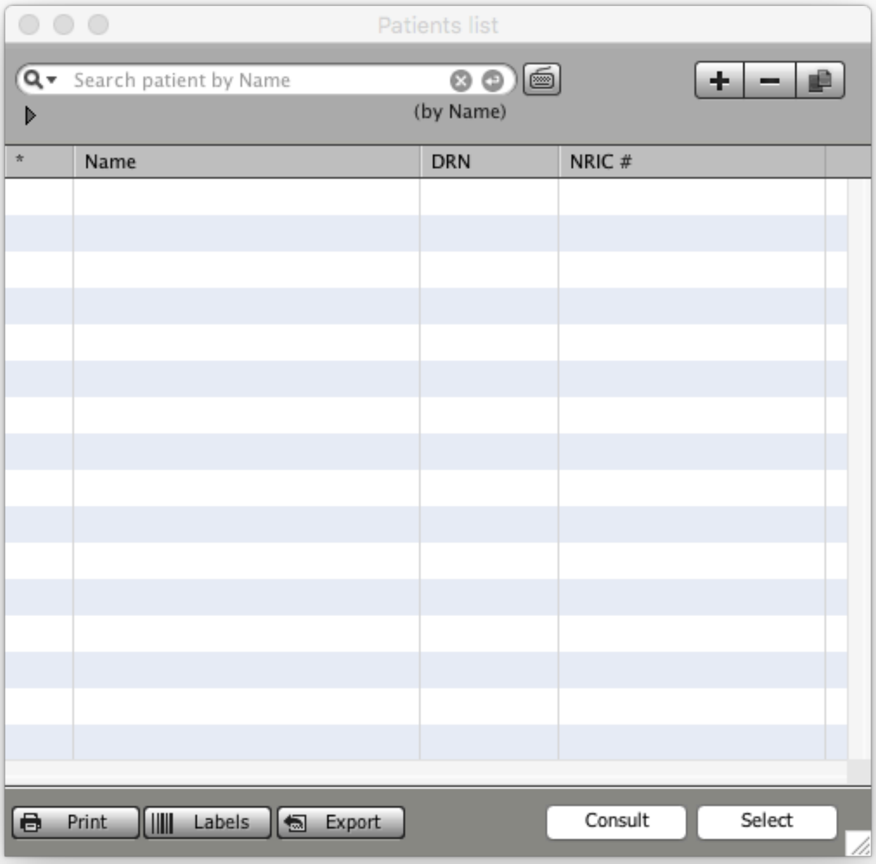
Practitioners are the people who perform the patient's treatment: Typically you define a practitioner for each doctor in your practice. Your base license is setup for 1 Practitioner unless you signed up for a multi-practitioner package.

To set the clinic's practitioners, go to the Archive menu and select Practitioners.



How do you create a patient?

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

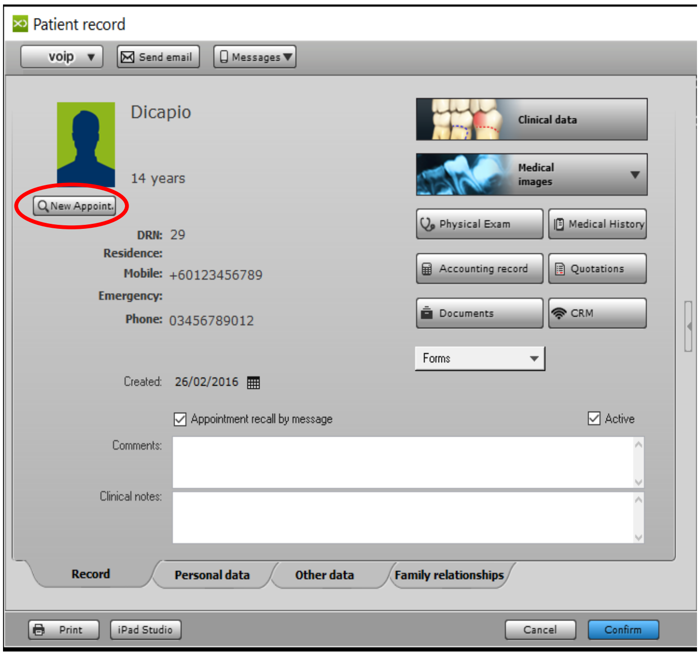


See details in section PATIENTS.

How do you fix a new appointment for a patient?

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

See details in section PLANNING WEEKLY / DAILY.



Alternatively, go to 'Agenda' in the toolbar, select one of the schedules (weekly, daily, etc.) and double click the requested time in the schedule.

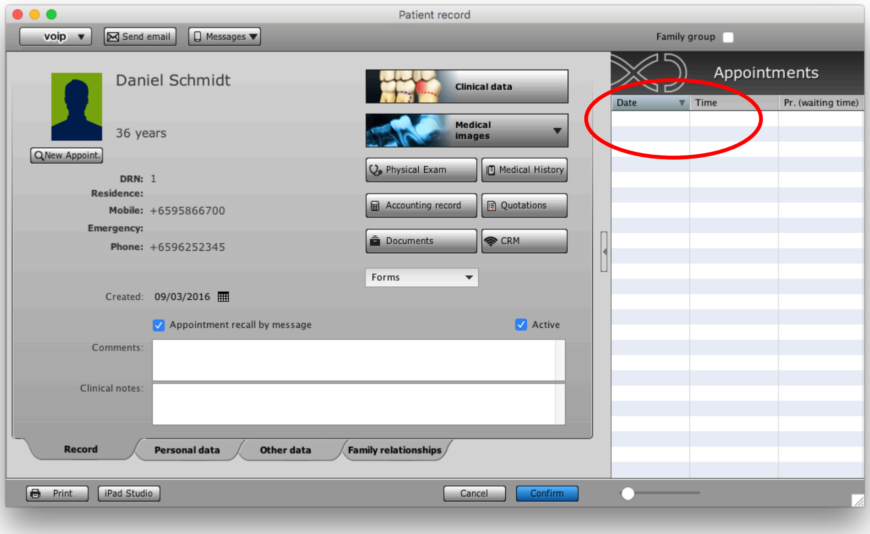
How to move an appointment?

Click the "Agenda" button in the toolbar to activate the daily or weekly planning. When you locate the event to be moved drag it to the new location, or use the cut and paste with a click of the right mouse button the appointment.

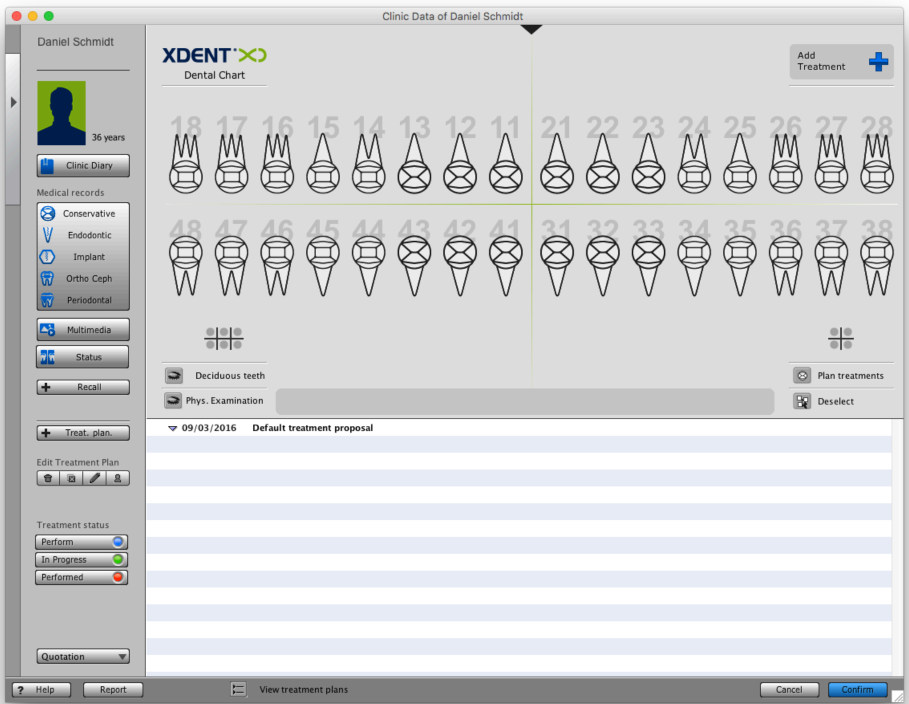
See details in section PLANNING WEEKLY / DAILY

How do you create a treatment plan?

Open the patient's record, and press the "Clinical Data" button.



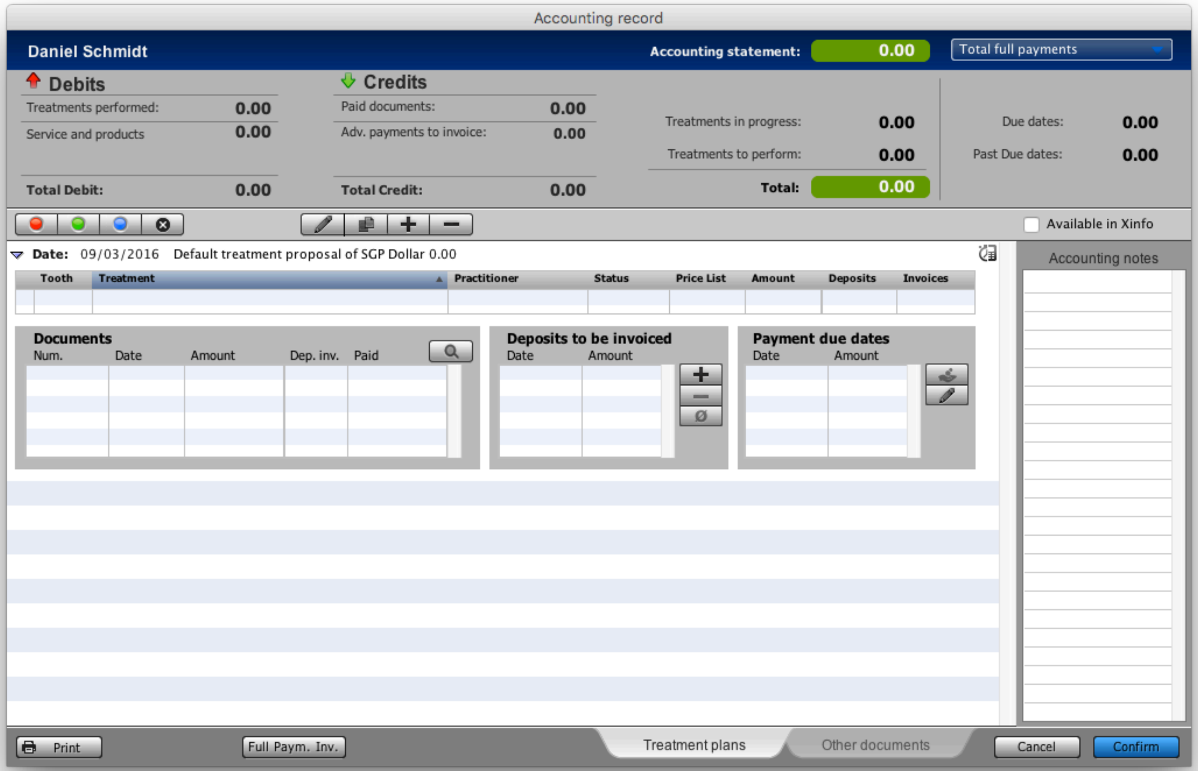
From the "Add service" button to select the services concerned and click "Confirmation".



See details in section PATIENT DATA.

How do you issue an invoice?

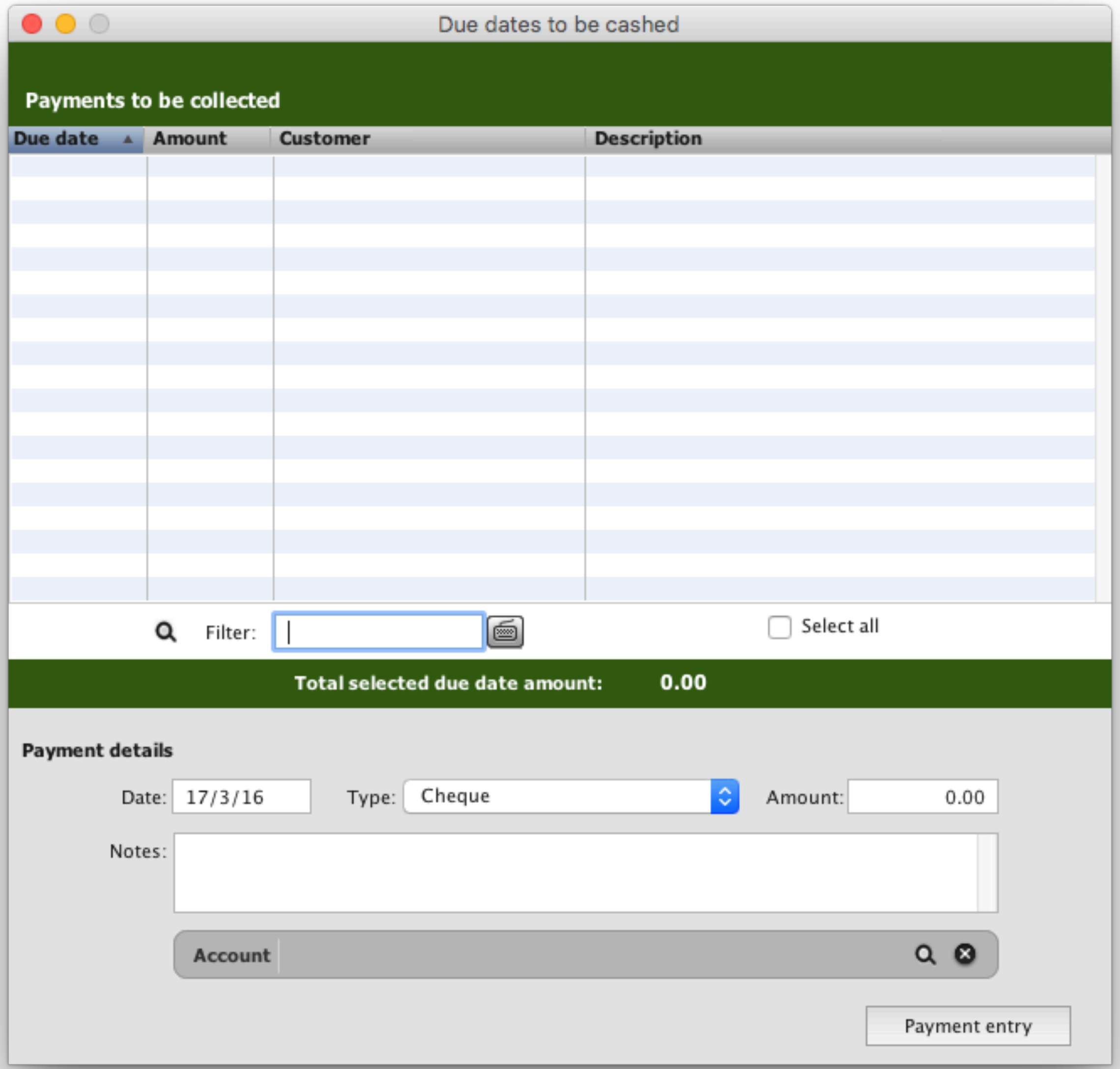
Open the patient's record, and press the "Accounting Record" button. Then choose whether to issue a Deposit invoice or to invoice performed treatments. To invoice performed treatments, you need to select the treatments to invoice from the treatment plan in the Accounting Record and click “Full Paym.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



See details in section PATIENT DATA.

How do you register a payment of an invoice?

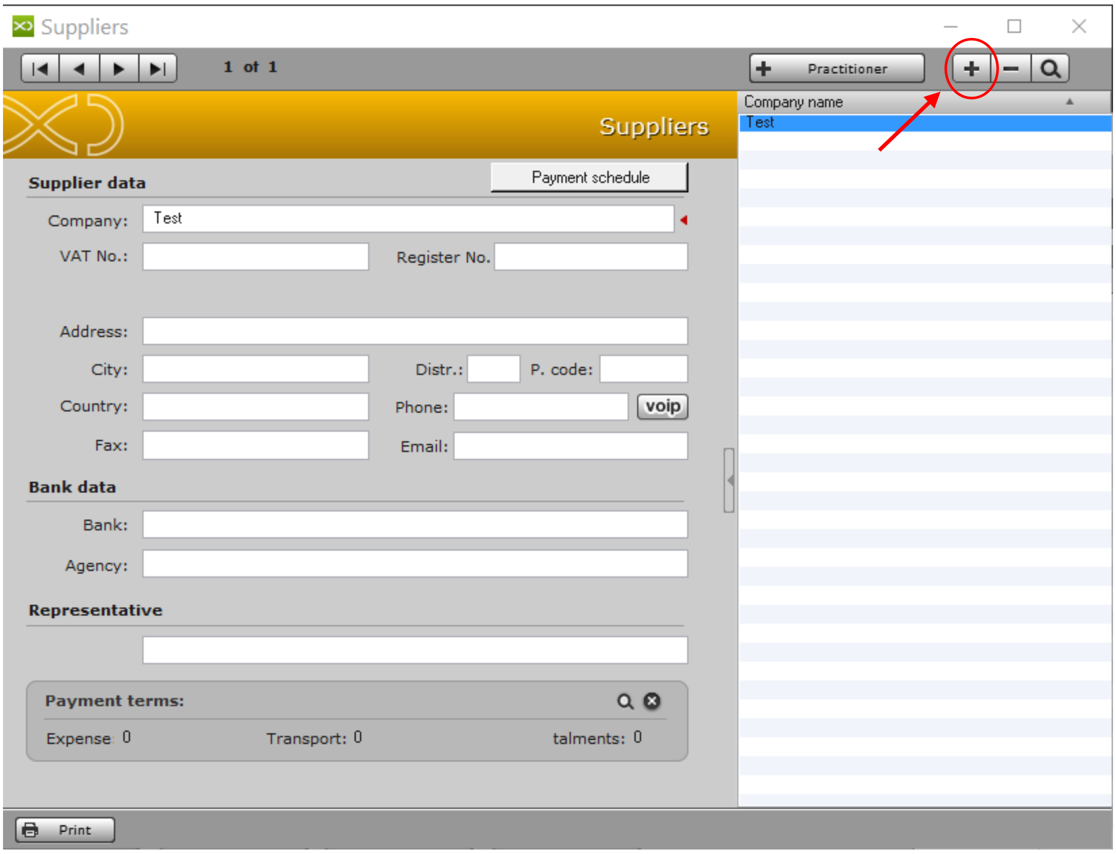
Go to the menu bar, click “Accounting” followed by “Credit Collection”



You will see the outstanding payments listed here and can perform payment collection.

How to register a supplier?

From the menu bar, go to the item ACCOUNTING / SUPPLIERS. Insert lists of the supplier by clicking the "+" button. See details at section SUPPLIERS.

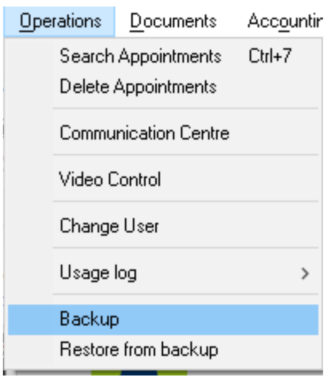


As you make a copy of the personal data?

From the menu OPERATION, enter the item BACKUP.

This feature allows you to save all data to a location of your choice. The data will be saved in a device selected in a folder with the date and time of the rescue.

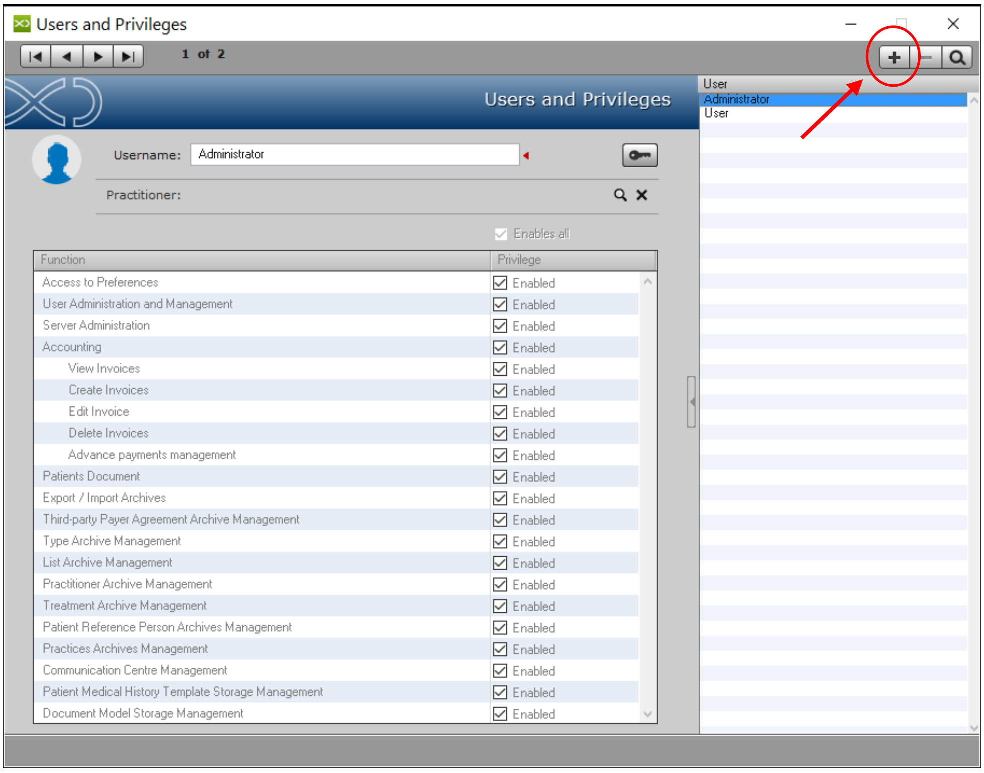
Backups can be restored at a later time, from the menu OPERATIONS / RESTORE FROM BACKUP.



USERS AND ACCESS RIGHTS

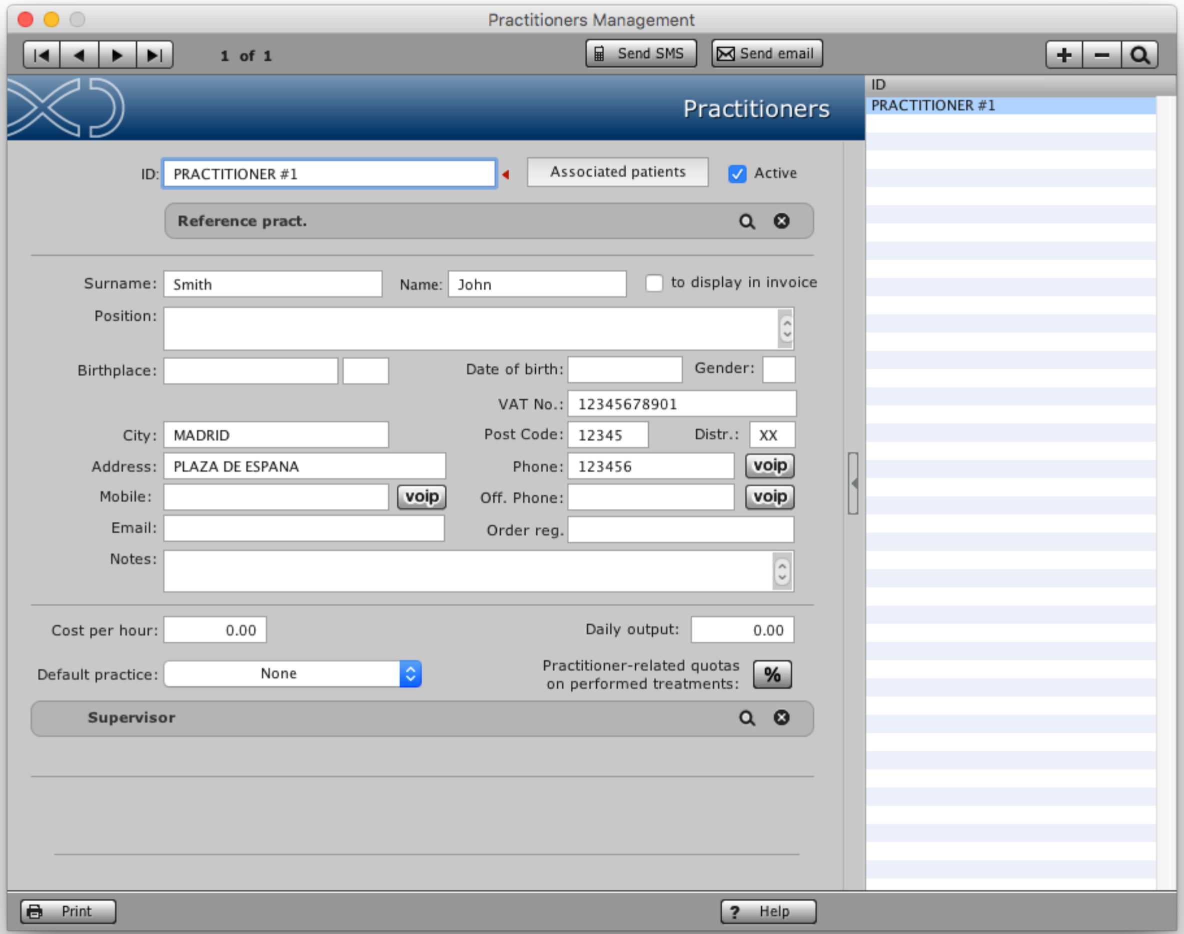
Access the menu ARCHIVE under USERS AND ACCESS RIGHTS.

The User Archive Management window contains the "+" button, "-" through which you can add or delete a user. These operations are shown in the management of all other files provided in the software. Selecting a user from the list, you can change your password and define the user's access permissions



PRACTITIONERS AND PRACTICES

Under Archive/Practitioners you can add and remove Practitioners if your license setup permits you to. If it does not, please contact us. In the Practitioners submenue, you can enter all details required per Practitioner.



PATIENT ARCHIVE

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

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

To open a patient record, you must search for it, select it and click "View" or making Double click on the name of patient shown in the list.

To insert a new patient, you need to click the "+" button and enter the personal data of the patient. XDENT allows you to choose which fields must be filled. These are indicated with a red triangle. To change those settings, call us and we will explain to you how it is easily done.

To permanently delete a patient from the archive, select it from the list and click the "-" button. The cancelation of a patient produces the elimination of all data to it associated (appointments, images, care plan, documents, etc.).

You can also duplicate a patient already present in the archive. The operation is carried selecting a patient from the list and clicking on the "Duplicate button Patient"

PLANNING WEEKLY / DAILY

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

- **Planning Practitioners:** used to manage the appointments of an individual doctors.
- **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.

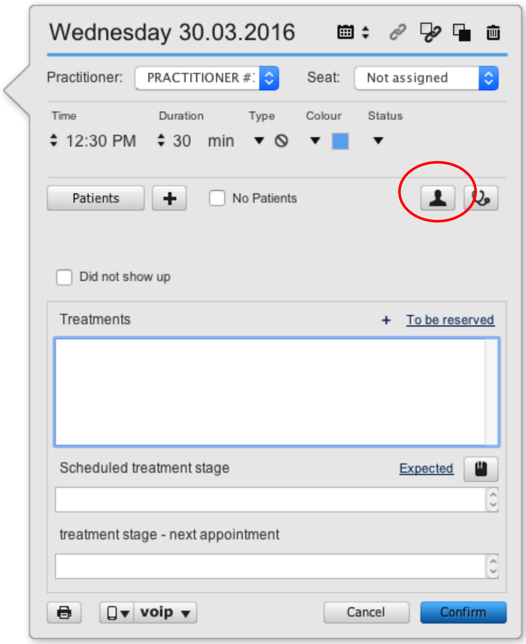
Depending on the type of clinic organization, choose the desired planning.

The window Weekly / Daily Planning is displayed at 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 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".



The calendar can be browsed through with the arrow buttons on the left wing of the window. These allow you to view day or the next / previous weeks compared to the current one.

The "Go" button in the calendar is used to move directly to the day or week desired to assign, for example, a later appointment.

To move an appointment, the fastest mode is to click on it with the right button of the mouse, select the action "Appointment Cut", locate the agenda where you want to reschedule and paste it to the new location. Alternatively you can drag and drop the appointment to another slot.,

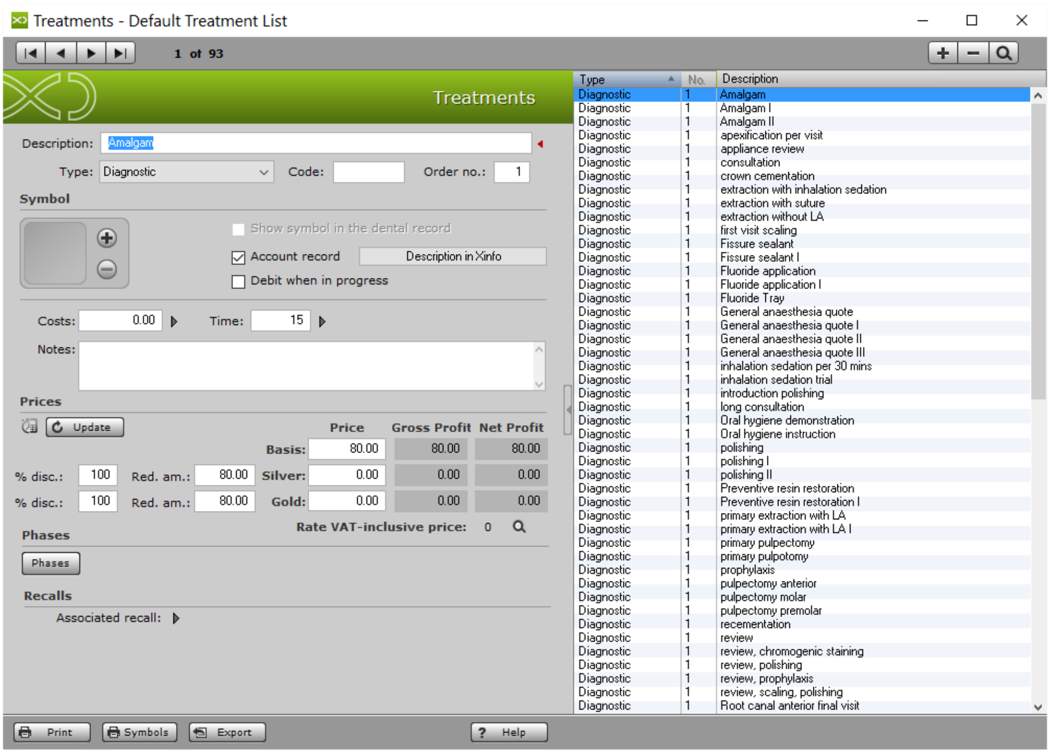
There is also a search function for the first available appointment. It is activated via the button "New App." in the left bar of the Schedule. It automatically detects the list of possible appointment available, depending on the patient's needs.

Via the "Waiting" button, XDENT allows you to manage emergencies and suspended appointments.

TREATMENTS – Default Treatment List

The clinic can modify preset treatments and adapt them to your rate, or create a new one. It can run any number of treatment lists.

To make changes to a treatment list, access to the Archive menu item, click Treatments and Management.

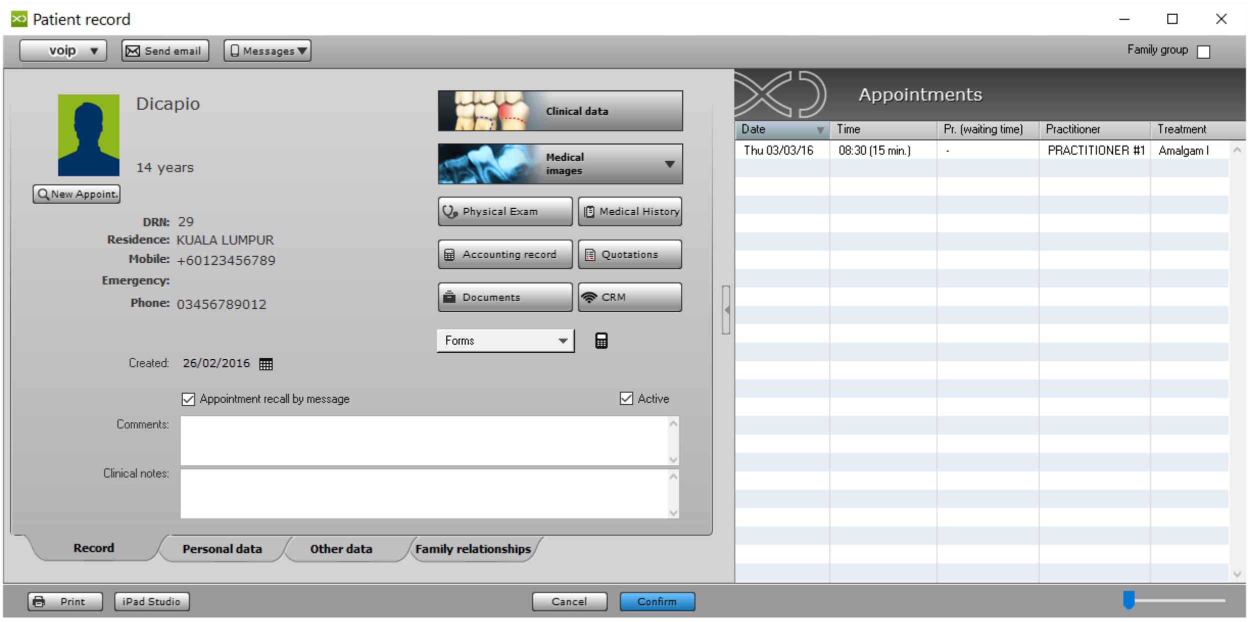


To create a totally new price list, select the Price Lists menu option in Archive.

PATIENT Record

The patient record allows you to consult all the information related to the patient; this tab provides information to the clinical type, accounting, medical images, documents, forms as well as questionnaires and administration.

The following will explain the main functions of patient management; patient data are inserted in the "Personal Data" tab accessible via the appropriate button.



Clinical Data

The function **Clinical Data** provides a collection of past service to the patient and inserts those to be carried out.

The main window has a gray arrow on the left from which you can access a list of services performed frequently by the clinic. To drop a charge or treatment plan in the planned treatment, you must drag the symbol of the relevant tooth.

In the case of services not related to the individual tooth, but to the entire mouth (plaque removal, orthodontic treatment, etc.), just double click on the symbol.

Services/Performance can also be added via the special "ADD Treatment "from which you can access the entire list.

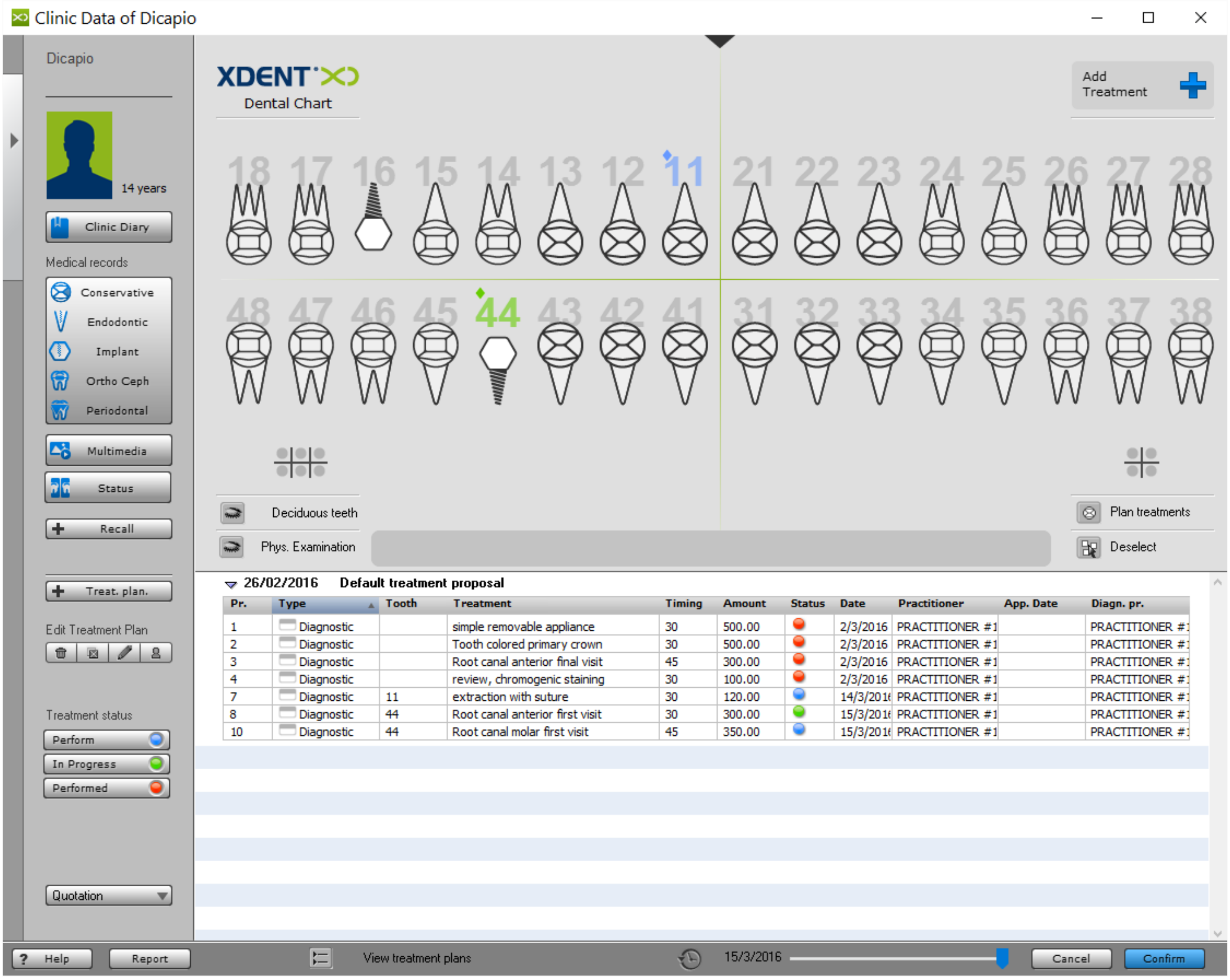
After insertion of the treatment, you can generate an estimate. The quote button opens a window where you can save to the entire plan treatment or individual performance and indicate the method of payment agreed with the patient.

The "Create" button creates the quote ready to be printed. You can access quotation via the button Quotations in the main Patient Record window. The state of the quote can be changed from the drop-down menu.

NB: The unaccepted quote is temporarily removed from the Treatment Plan. At the time of acceptance of the quotation, the performance will be automatically reflected in the care plan, ready to be executed.

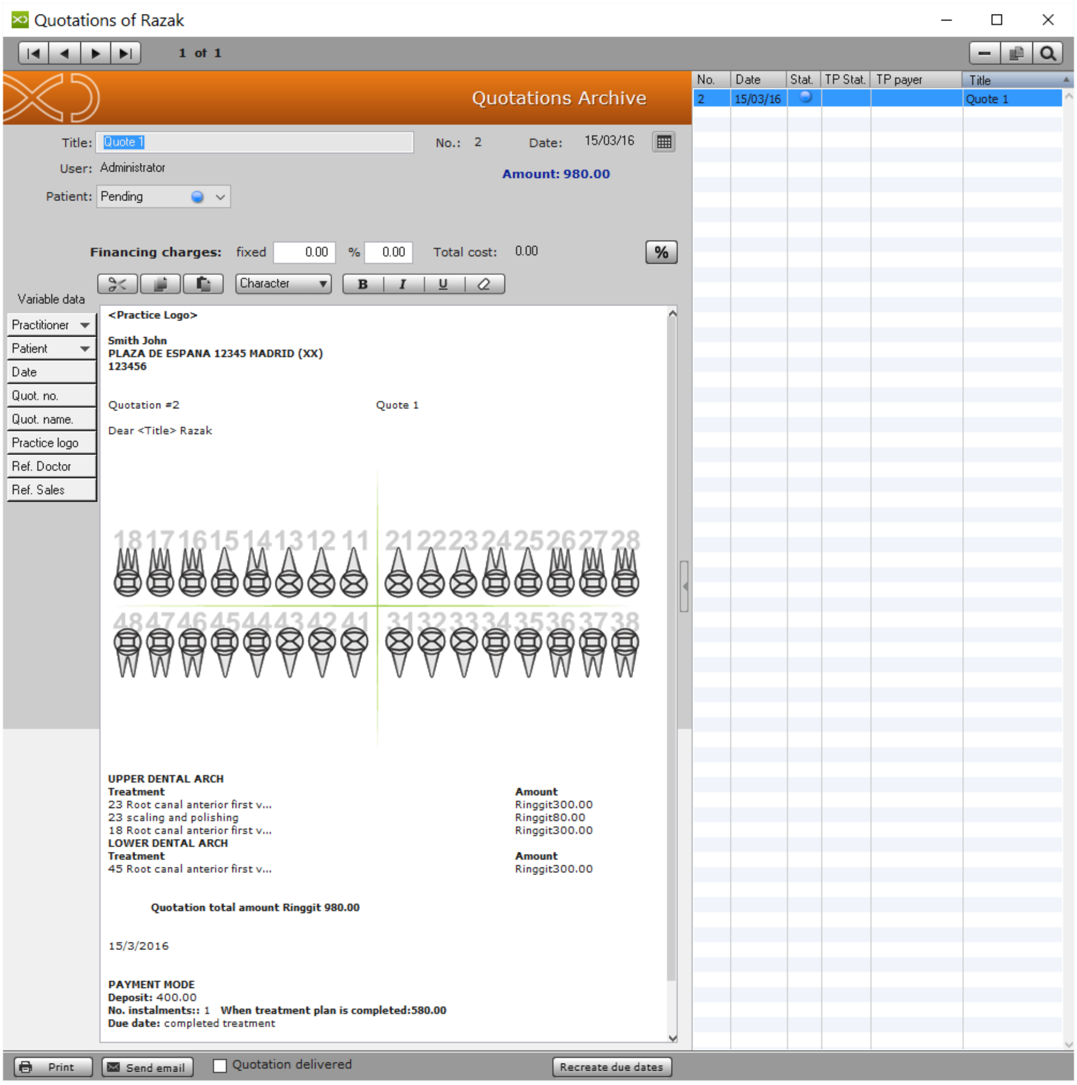
When the doctor performs a treatment to the patient, the state can be changed from “Perform” to "In progress" and" “Performed ". This is done bottom left.

In this case, the symbol present in the treatment plan changes color.



QUOTATION

The **QUOTATION** feature contains all the patient's estimates, from here you can generate a cost estimate for the patient with the payment terms agreed upon and change the state of each of them and eventually eliminate them or duplicate them to adduce changes.

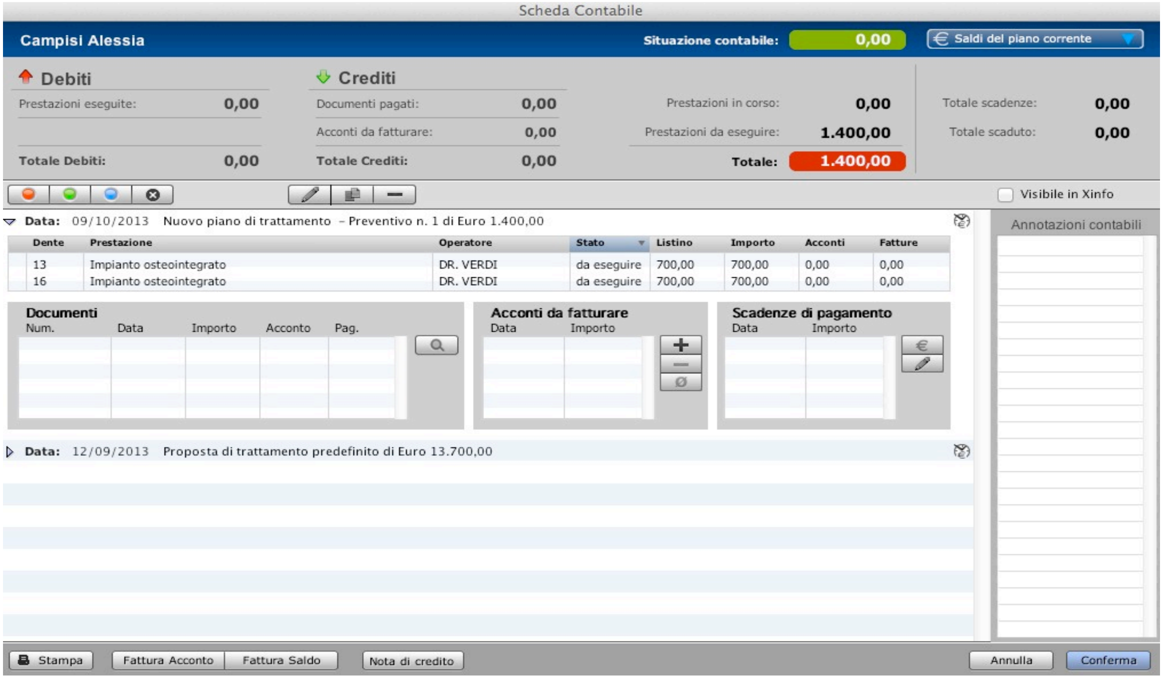


ACCOUNTING DATA

Via the button "ACCOUNTING Record", you can access the accounts of the patient.

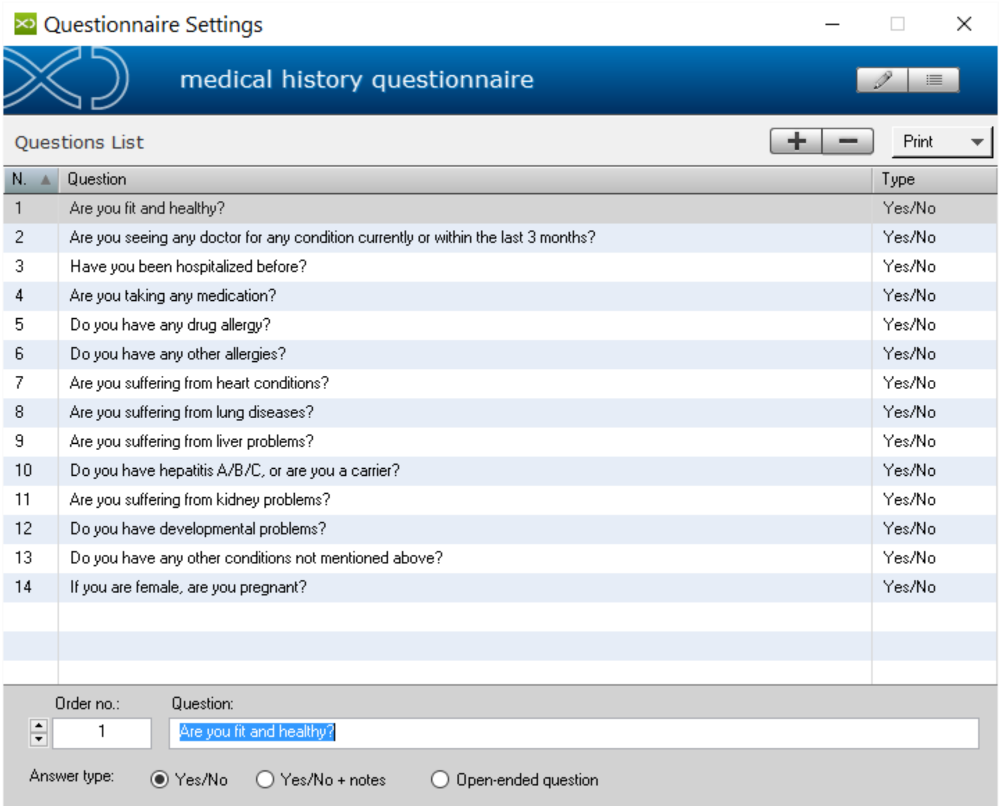
Here you will find all the features present in the treatment plan with the prices, and the debt of the patient's credit than the services provided.

See more details in Section INVOICES



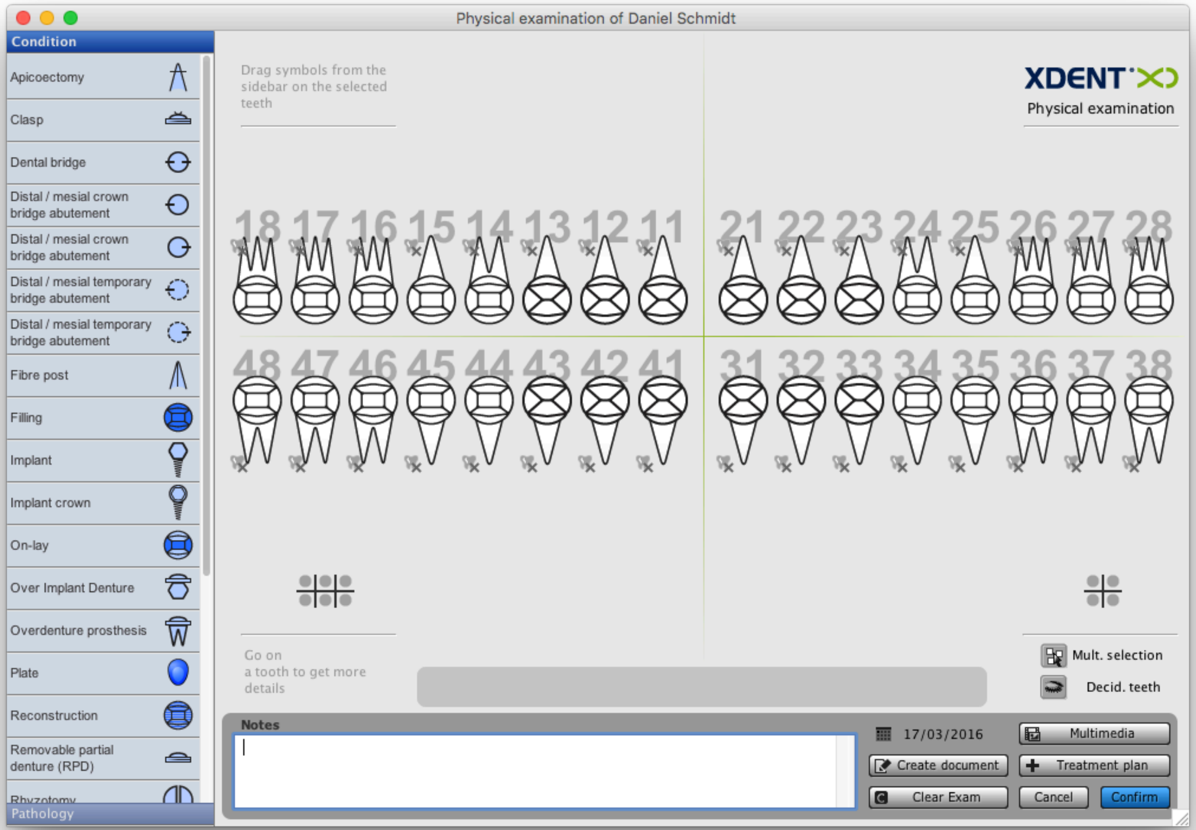
MEDICAL HISTORY

This function allows, via the "+" button, to enter the questionnaires present within the software and compile it. The same may be modified or created from the menu DOCUMENT / MEDICAL HISTORY QUESTIONNAIRES.



PHYSICAL EXAM

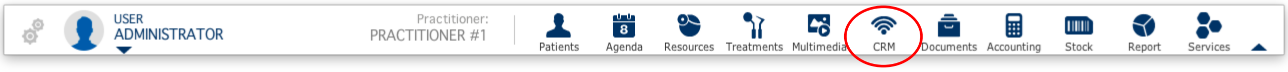
The function **PHYSICAL EXAM** allows you to document the state of the mouth detected at the first visit by the doctor.



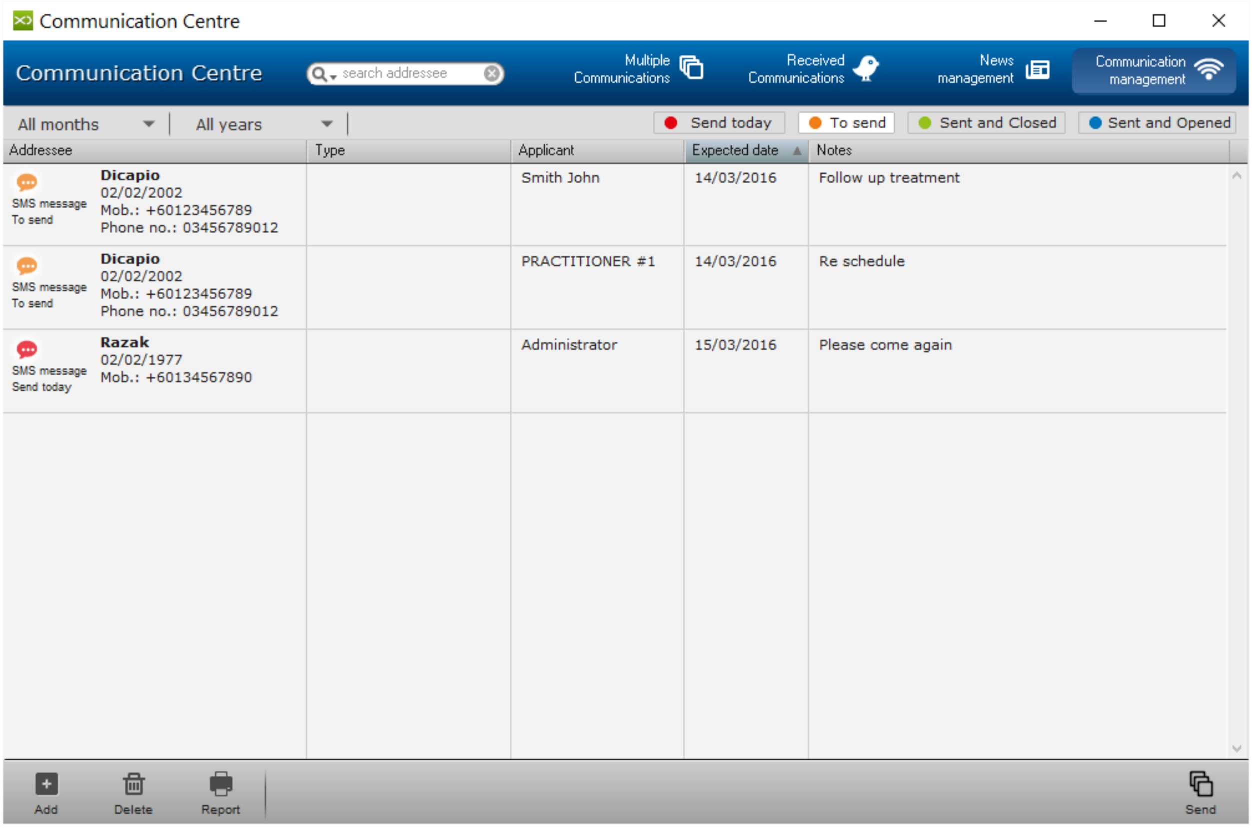
The diseases and states can be dragged onto the teeth by the symbols on the bar left. When done, click ‘Create Document’ to print and/or archive the status electronically.

It is possible to add new pathologies and conditions from the menu Archive/Pathologies and Conditions.

CRM



The **Callback** feature allows you to add automatic patient recalls. You can specify the type the 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.



All recalls in the communications center are marked with a "status". You can change the status with the buttons; "Telephone", "notification", "SMS", "E- mail "," Letter. "

Widely used is the SMS service, which lets you send a communication via SMS to the number patient's cell.

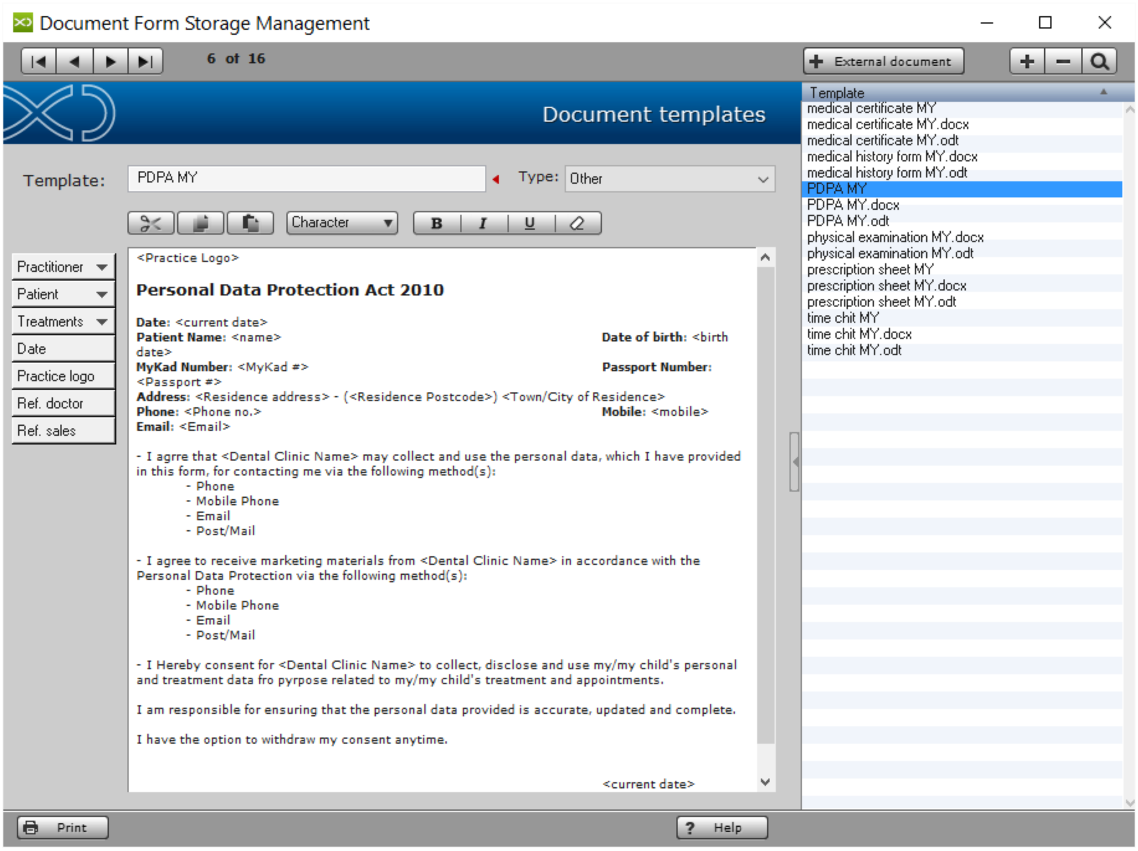
XINFO, the patient App available, will save you costs for sms as messages are directly sent to the patients App at no charge.

DOCUMENTS

Via the function **DOCUMENTS**, you can access the patient's document archive.

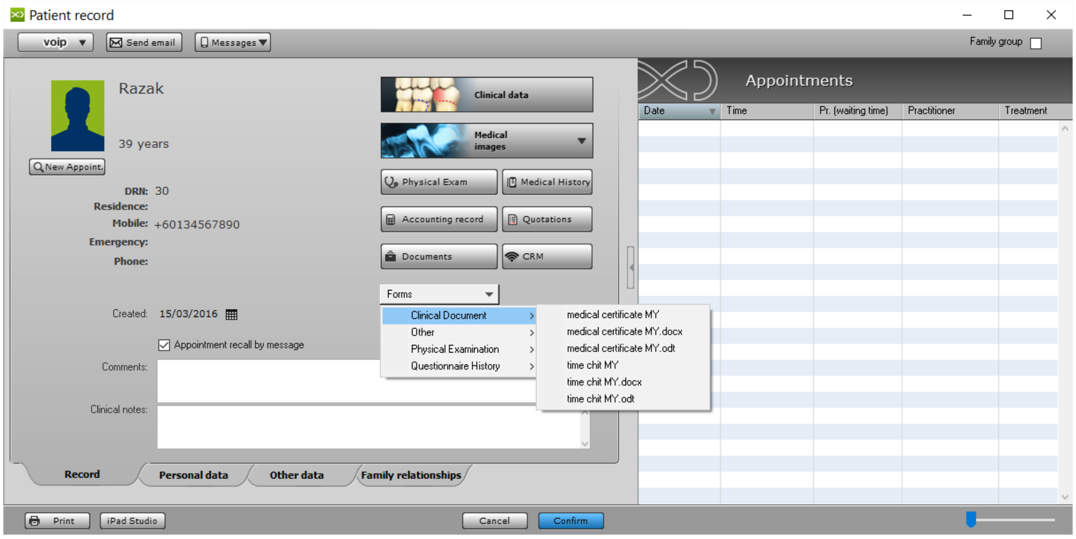
The documents are issued by the button "Forms" present in the Patient Record and they can be stored.

You can alternatively drag and drop any file from your workstation into the Document Archive, e.g. to archive paper records that you have scanned.

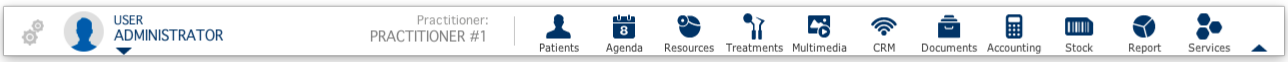


FORMS

The FORMS function contains a set of documents. The same can be edited and printed.



To create new documents, delete or modify existing ones, go to the menu DOCUMENTS and select Document Forms.



It also provided the inclusion of external documents in .docx or .odt format.

STATISTICAL REPORTS

This function is accessible from the toolbar or from REPORT menu and allows you to obtain statistical information on the doctor's clinic. It is such tool 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.

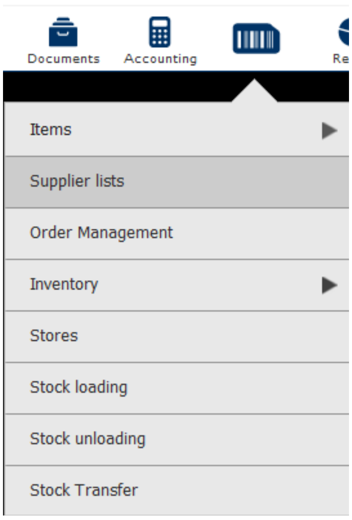
Reports can also be obtained in graphic form and results can be exported to Excel data sheets for a possible post-process

STOCK

From the menu STOCK, you can enter inventory items, consumable or any other sales items for your clinic.

Loading and unloading of stock may be made from STOCK / STOCK LOADING.

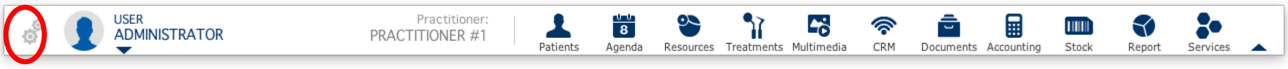
It is also possible to access the inventory study from STOCK / INVENTORY menu.



PREFERENCES XDENT

On the preferences, you can customize the functions available within the software based on their needs.

In "General" you can set the parameters concerning the use of the software. ‘Clinical’ sets the features that relate to the patient's medical record.



CONCLUSION

This Quick User Guide will enable you to use XDENT’s basic functionalities. It gives an overview on 10% of the software’s capabilities. Consult us for a detailed presentation and training to maximize the software’s capabilities.