XDENT®

Dental Information System

QUICK GUIDE

Synchronizing Healthcare

CompuGroup Medical

Table of Contents

Revision History

Version	Revision Date	Modified by	Description of Revision
0.9	May 2016	Daniel	High level guide
1.0	June 2016	Kewal	Modified to detail guide
1.1	Oct 2016	Kewal	Reconstruction of document
1.2	Dec 2016	Kewal	Including new features like: – Default treatment notes – Medical certificate – Export Receipt list – Patient Document Transmission – Duplicate lookup for Patient Record

1. 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 to learn. In addition, XDENT is a complete software that can handle all clinic requirements, even the most complex. For a more in-depth knowledge of the programme, 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 most useful answers for a quick start usage, and includes a more detailed plan for the SECTIONS relating to the basic functionalities.

2. HARDWARE PLATFORM

No specific hardware is required in order to run XDENT as a server or client workstation: any standard commercial product on the market can be used.

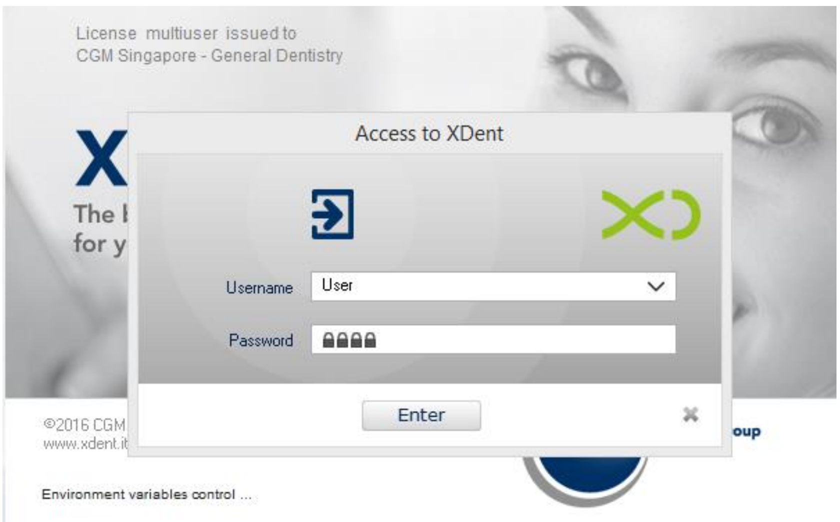
	Clinic with 4 workstations/computers or less (incl. XRAY Server)	Clinic with 5-10 workstations/computers (incl. XRAY Server)	Clinic with 11-20 workstations/computers (incl. XRAY Server)
Recommended Server Specs	Windows: Intel Core i5, 8GB RAM, 1TB HDD OS Window 7 & Above	Windows: Intel Core i7, 8GB RAM, 1TB HDD OS Window 7 & Above	Windows: Intel Core i7, 16GB RAM, 1TB HDD OS Window 7 & Above
Minimum Server Specs	Windows: Intel Core i3, 8GB RAM, 1TB HDD OS Window 7 & Above	Windows: Intel Core i5, 8GB RAM, 1TB HDD OS Window 7 & Above	Windows: Intel Core i7, 8GB RAM, 1TB HDD OS Window 7 & Above
Recommended Client/Computer Specs	Intel Core i5, 4GB RAM, 500GB HDD Windows OS 7 & Above MAC OS X Lion 10.7 & Above		
Minimum Client/Computer Specs	Intel Core i3, 4GB RAM, 250GB HDD Window OS 7 & Above MAC OS X Lion 10.7 & Above		
Mobile Device Specs	iPhone 5 (iOS 6.0) & Above iPad 4th Generation (iOS 6.0) & Above Android 4.4 KitKat & Above		

**Clinic with more than 20 Workstations required to use Windows Server 2012 R2*

3. LOGIN & ACCESS

How do I access XDENT?

When starting XDENT for the first time, you will be prompted for login credentials: username and password. Enter the user name and the password: example (user | user)
To change the access credentials, see the section on “users and access rights”.

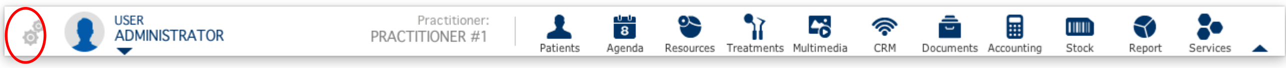


How do I access the functions of XDENT?

XDENT has a Top Bar Menu which displays all the features of the software. It also presents a bar of graphic buttons by which you can visually access the most commonly used functions.

4. GENERAL SETTING

Under Preferences, you can customize the functions available within the software based on your needs. "General" enables you to set the parameters concerning the use of the software.

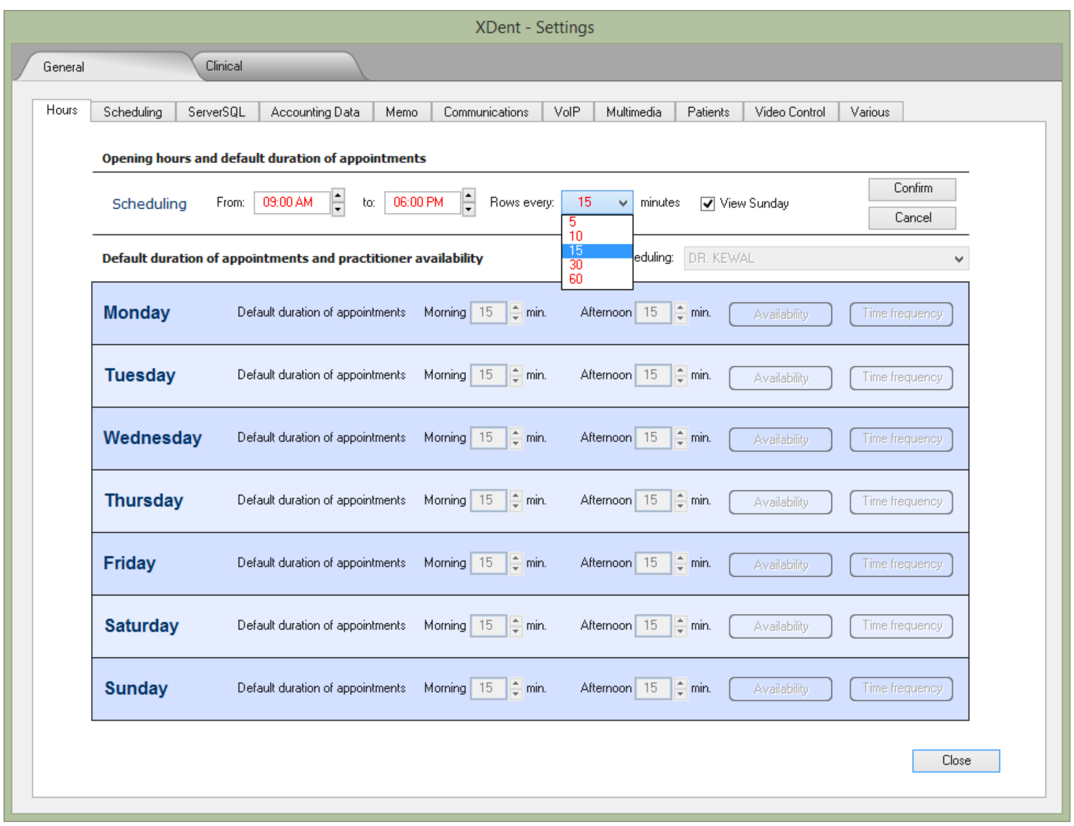


4.1. Clinic Hours

How to set Clinic Hours preference in XDent?

Each scheduling may be displayed using 5, 10, 15 and 30 minute intervals. This choice depends on the minimum duration of appointments scheduled by each practice. The default interval is 15 minutes.

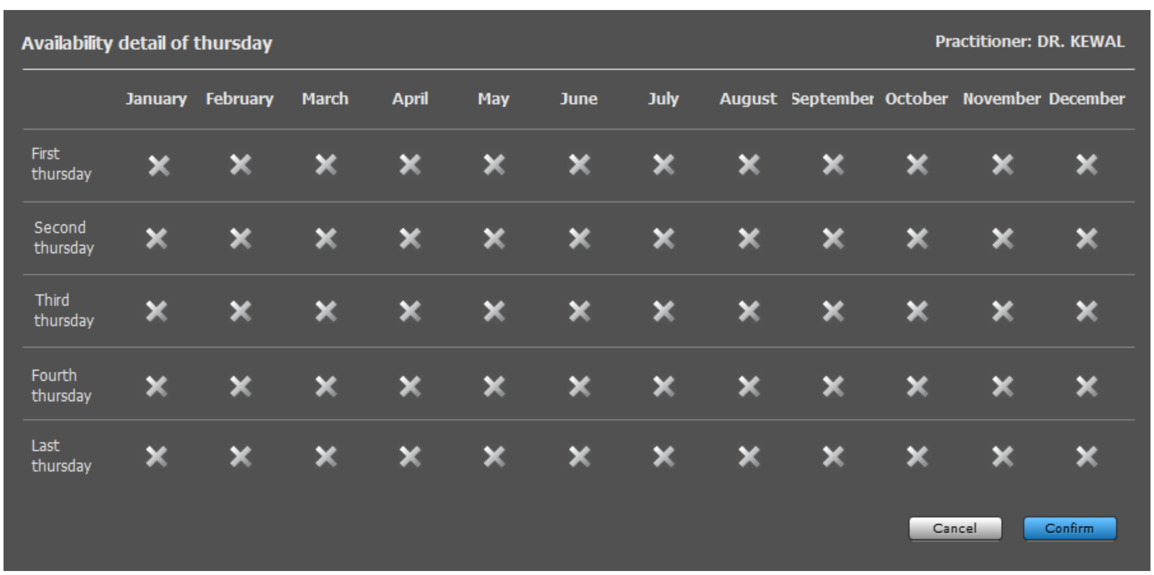
The schedule view can be set on a daily basis; furthermore, Sundays may be included in or excluded from the weekly view.



How to set Practitioner Appointment preference in XDent?

Practitioners' working hours can be customized, setting a default duration of appointments. A business day is split into morning hours (from 00:00 to 14:00) and afternoon hours (from 14:00 to 00:00)

The button Availability shows or hides available practitioners in daily morning or afternoon sessions. Multiple availability intervals for morning and afternoon sessions can be set. This option may be useful if there are practitioners who are available at specific time intervals only.

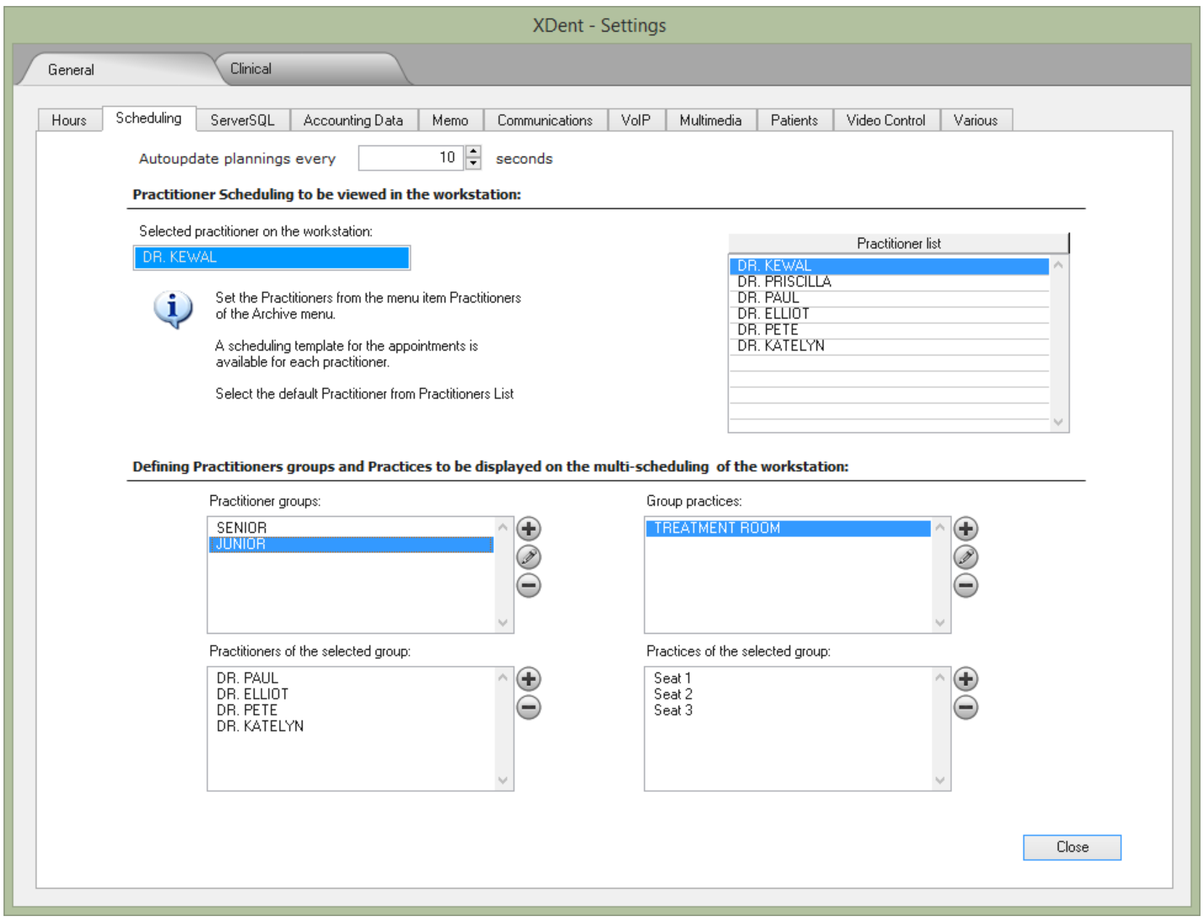


4.2. Scheduling

How do I group Practitioner and Practice in XDent?

In the case of practices with many practitioners, grouped scheduling views can be defined both for practitioner groups and group practices. This option allows a rapid view of both grouped practitioners’ and group practices’ weekly scheduling.

Settings can be defined for each workstation and are stored locally and independently. Each workstation can have different settings: therefore, in the case of similar settings in different workstations, each configuration has to be repeated.



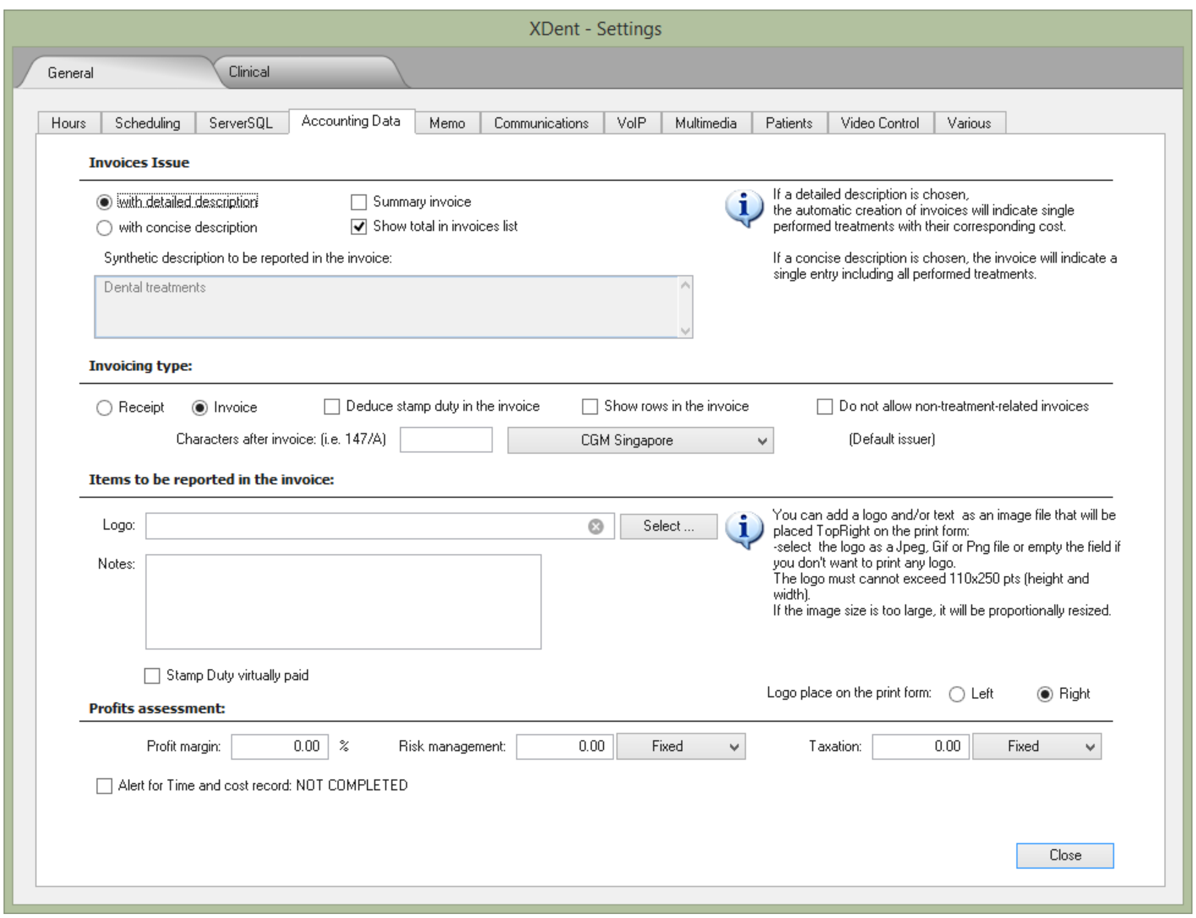
4.3. Account Data Preference

How to set Company Invoicing Preference in XDent?

Treatment-related invoices can be issued indicating a synthetic description or detailed description. In the case of detailed descriptions, invoices will be issued automatically indicating each performed treatment with its corresponding price. In the case of synthetic descriptions, the resulting invoice will show a single, synthetic item with all the performed treatments.

In addition, in the case of multiple invoicing details (e.g., practices with different practitioners issuing separate invoices), the default invoice issuer can be defined.

The invoicing system indicates the first available invoice number in a sequential order. In a specific field some characters can be defined after the invoice number. To print a customised practice logo, select an image (extensions allowed: Jpeg, Gif, Png). The logo must have a maximum size of 110x250 pixels (height x width) Images will be shrunk if they are too large in size.

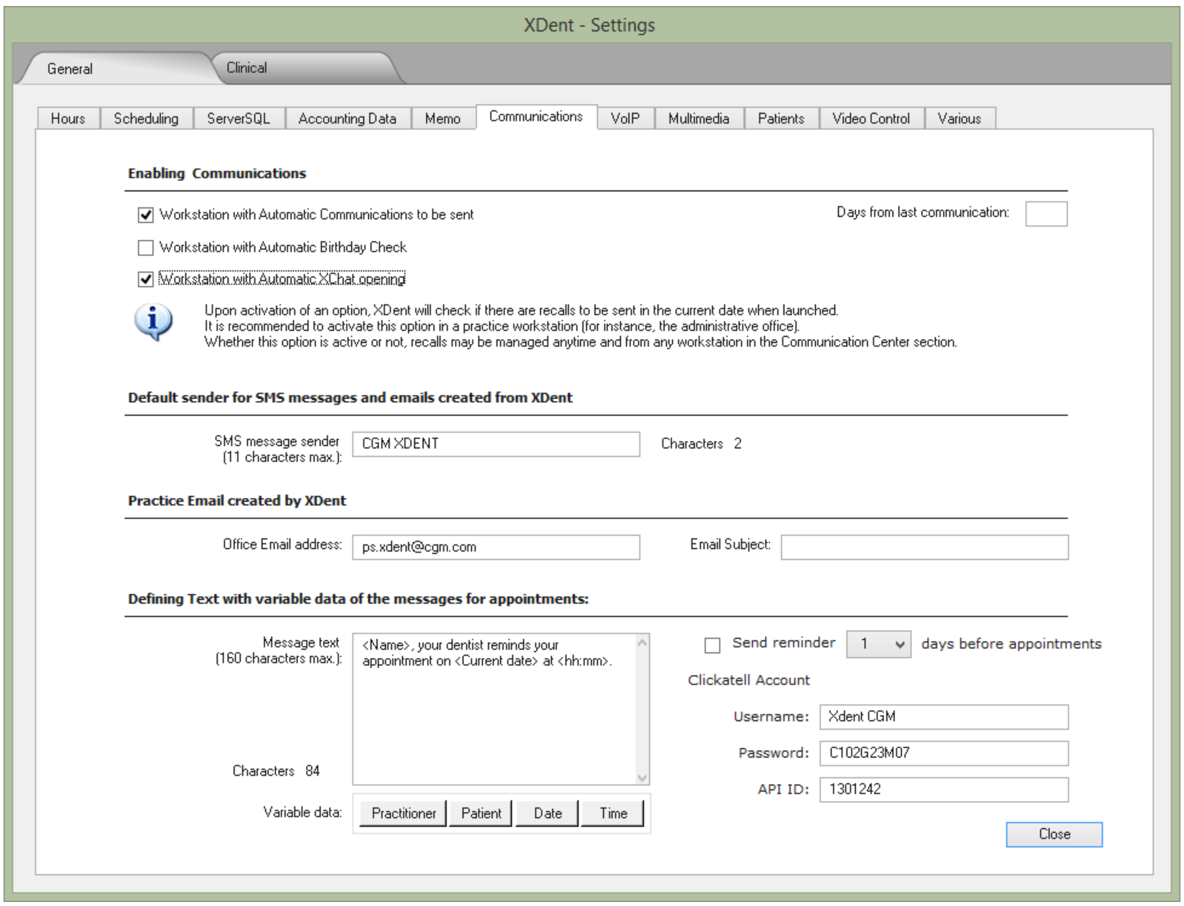


4.4. Email Setup and SMS Setup

How to set SMS Appointment Reminder and Text Message in XDent?

SMS text message settings are independent on each workstation and can be set differently on each workstation, as they are locally stored in each machine running XDENT. A default SMS text message to a Patient can be set as a reminder for an appointment.

For SMS Notifications, the Clinic is required to sign up for an account and purchase SMS credits with Clickatell (SMS Gateway)



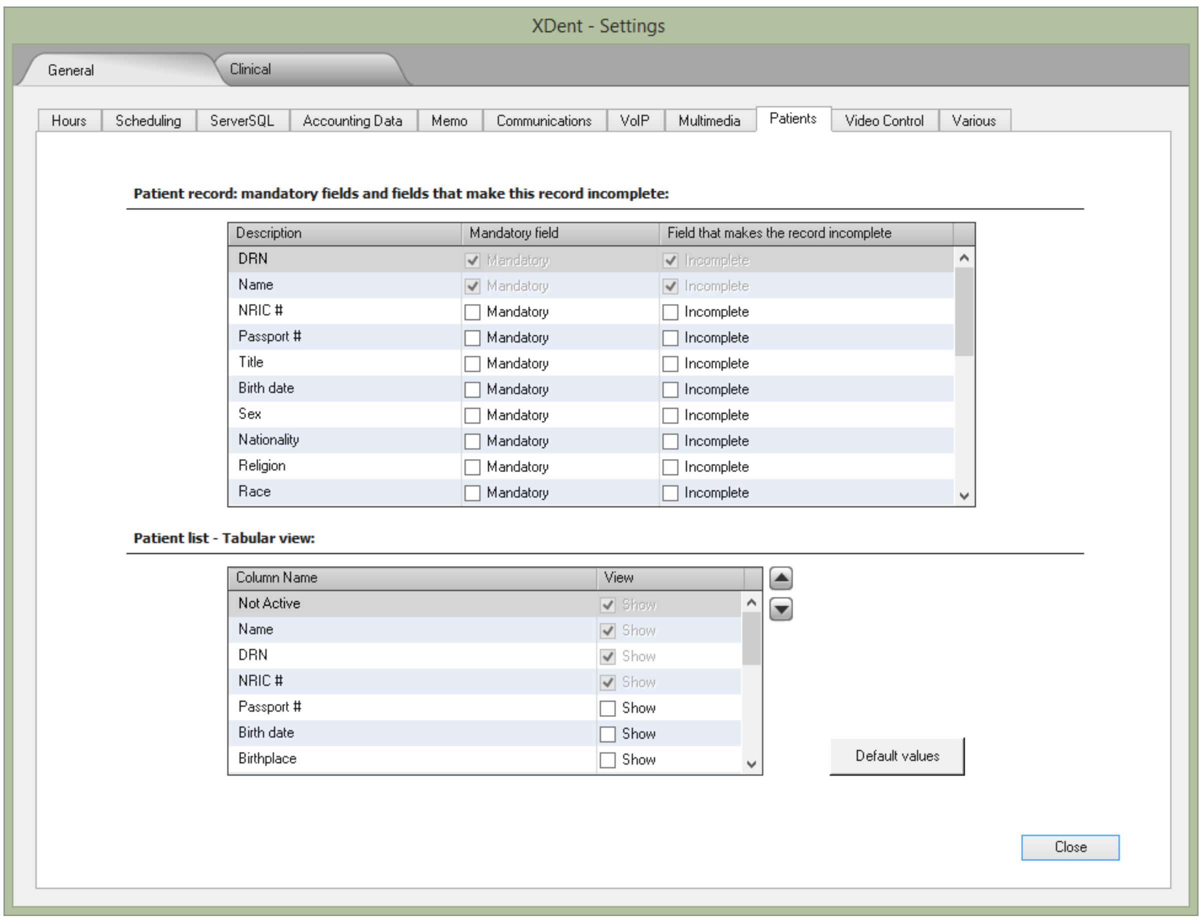
4.5. Patient Details

How to set Mandatory field for Patient Record in XDent?

Some specific fields in the patient record are indicated as mandatory and other fields activate the alert indicating a non-complete record.

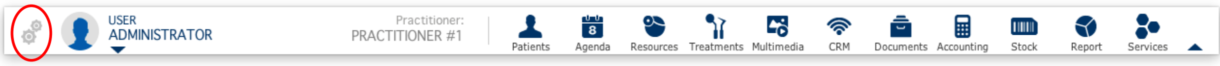
By default, mandatory fields are: DRN and Name. Mandatory fields are marked by a red arrow in the patient list.

In the patient list search, columns in the tabular view can be customised. If code, name and mobile number are chosen, these keys will be available in the search filter.



5. CLINICAL SETTING

In "preferences", you can customize the functions available within the software based on your needs. In 'Clinical' you can set the features that relate to the patient's medical record.

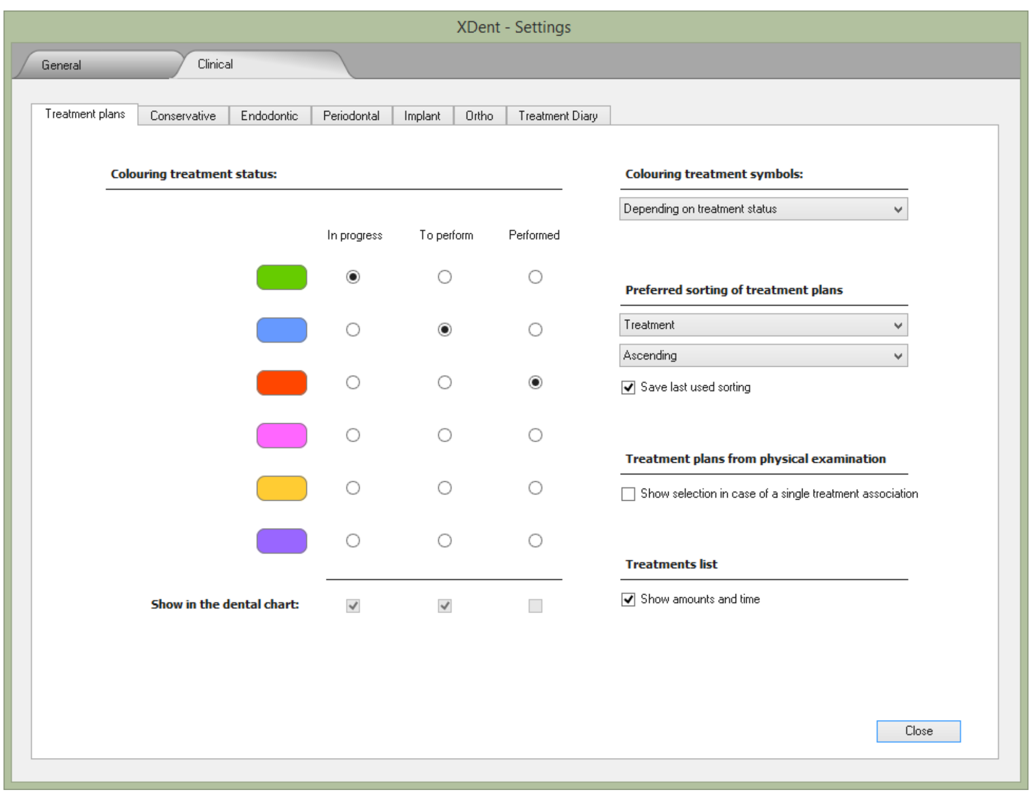


5.1. Treatment Plans

How to change Treatment Colour status in XDent?

Up to 6 different colours can be defined to differentiate the treatment-related operating status.

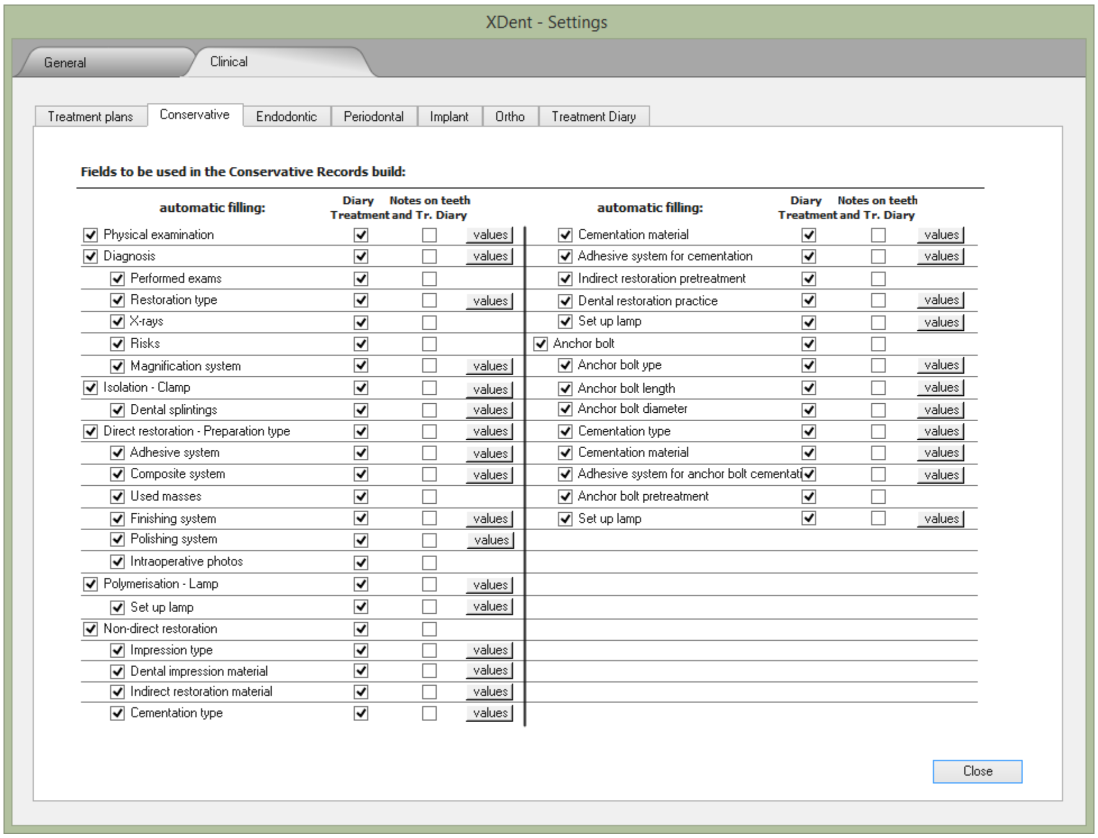
Default Example:
Green: in progress
Blue: to be performed
Red: Performed



5.2. Medical Record Templates

How to set Medical Record setting in XDent?

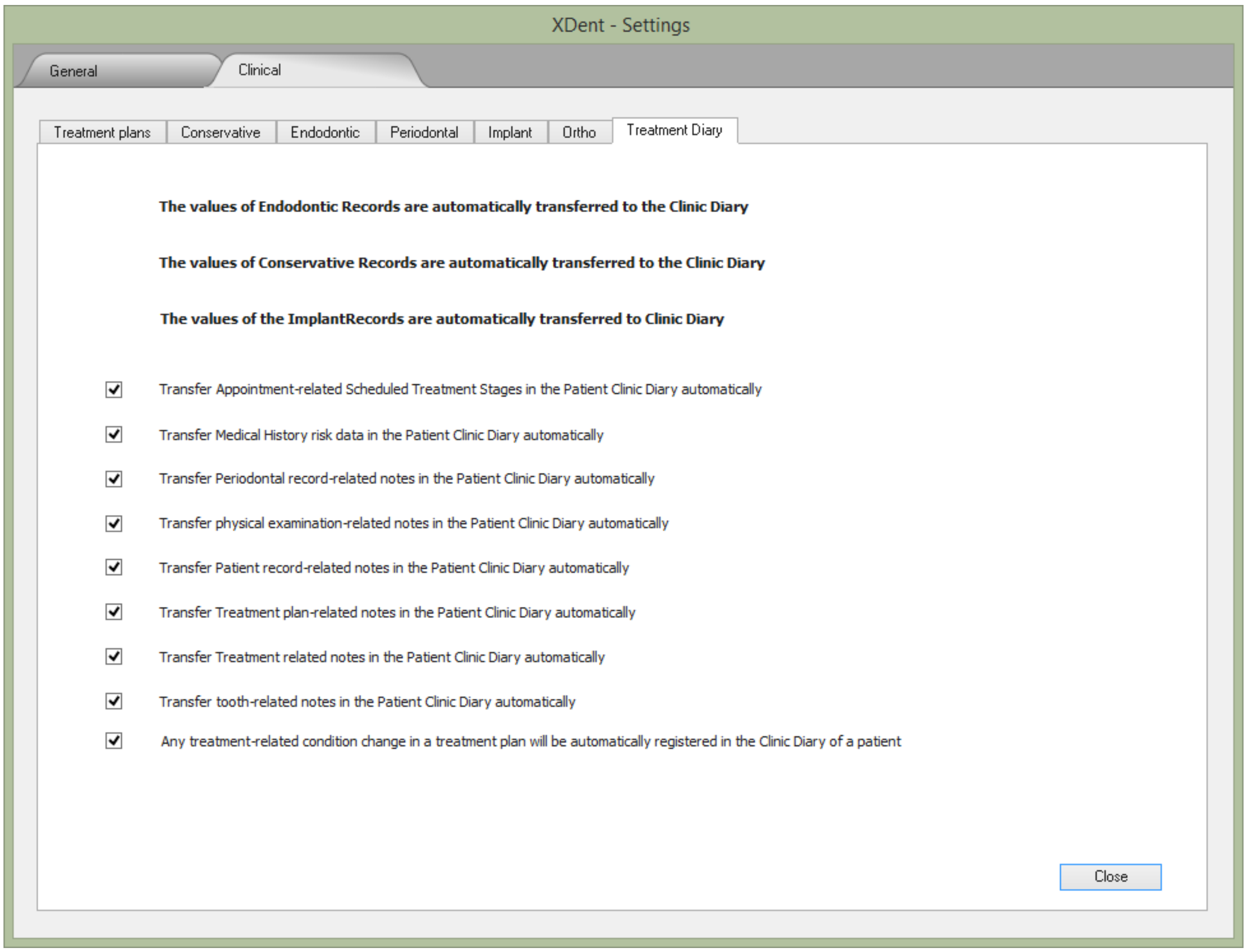
Users can customise medical record settings accordingly for Conservative; Endodontic; Implant; Periodontal and Ortho



5.3. Treatment Diary Records

How to set Treatment Diary setting in XDent?

Tick the checks belonging to the desired data to be included in the diary. Usually, all information that deals with a patient's medical history should be transferred. By default, all checks are enabled (ticked).

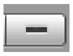


6. ARCHIVE

Archive consists of all the Major features in the XDent but the Guide will only describe those that are not available elsewhere from the Top Menu.

Legends:

 → To Add

 → To Delete

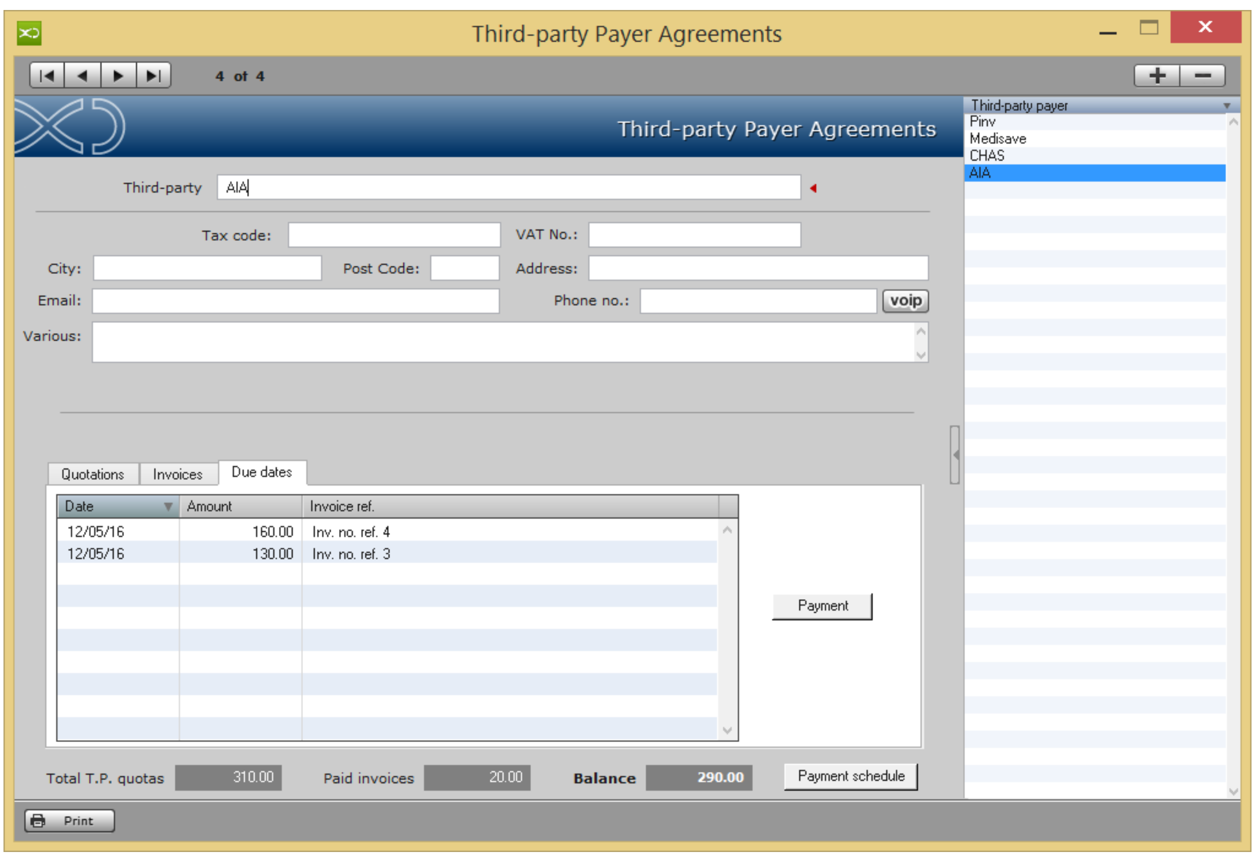
 → To Search

6.1. Third Party Payer Agreements

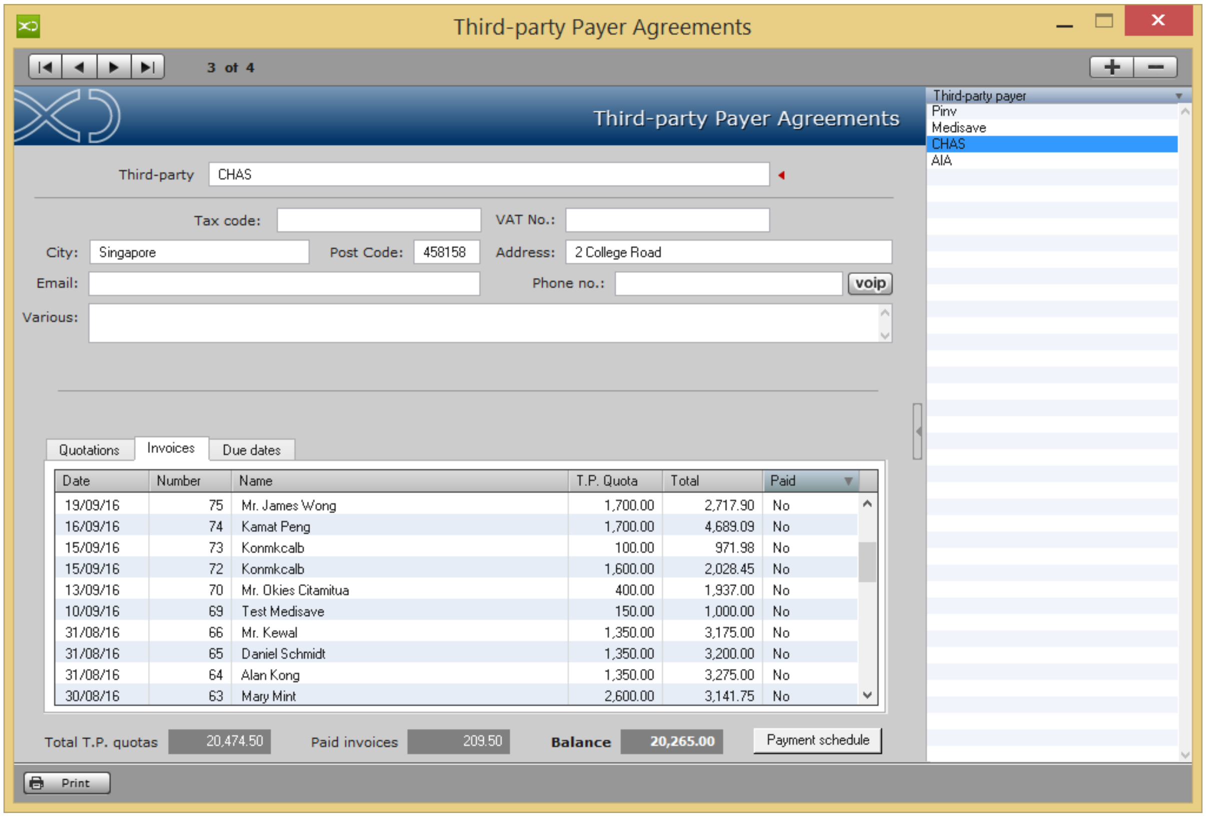
How to create Third Party Payer Agreements in XDent?

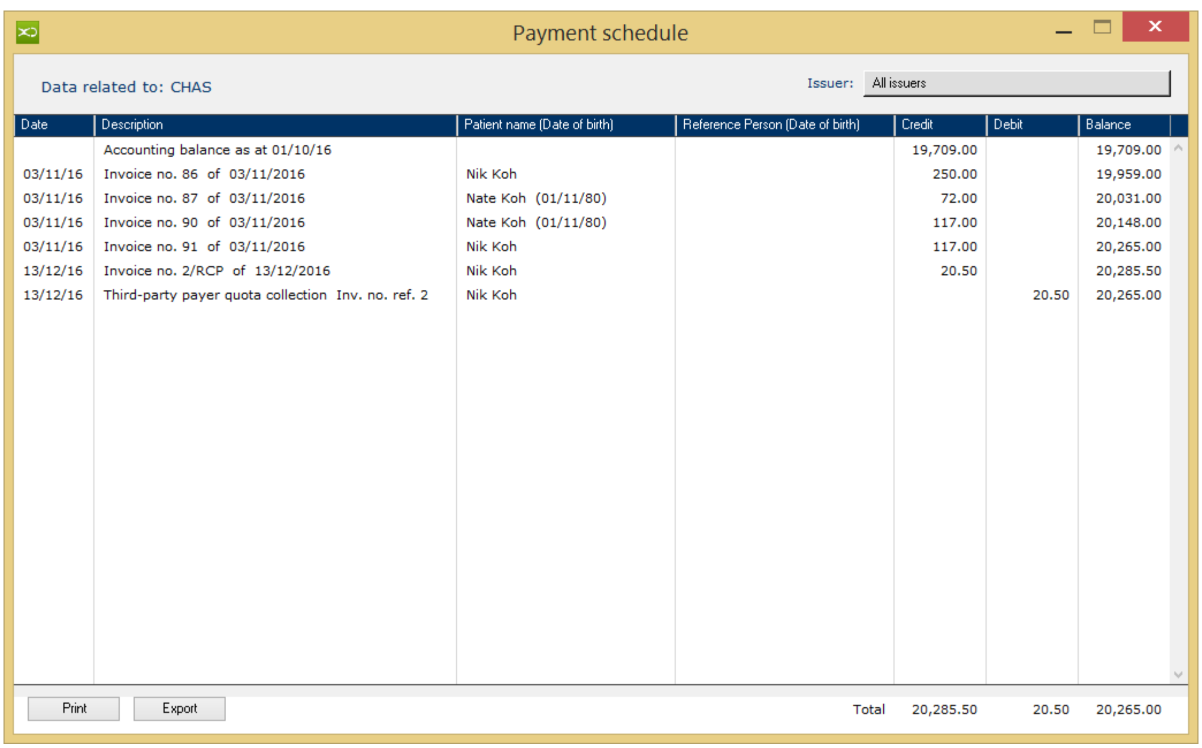
Archive > Third-party Payer Agreements

Click + to add a new third party payer, enter mandatory field



Able to check Invoice that has been issued with third-party payer and also create payment schedule and payment record.



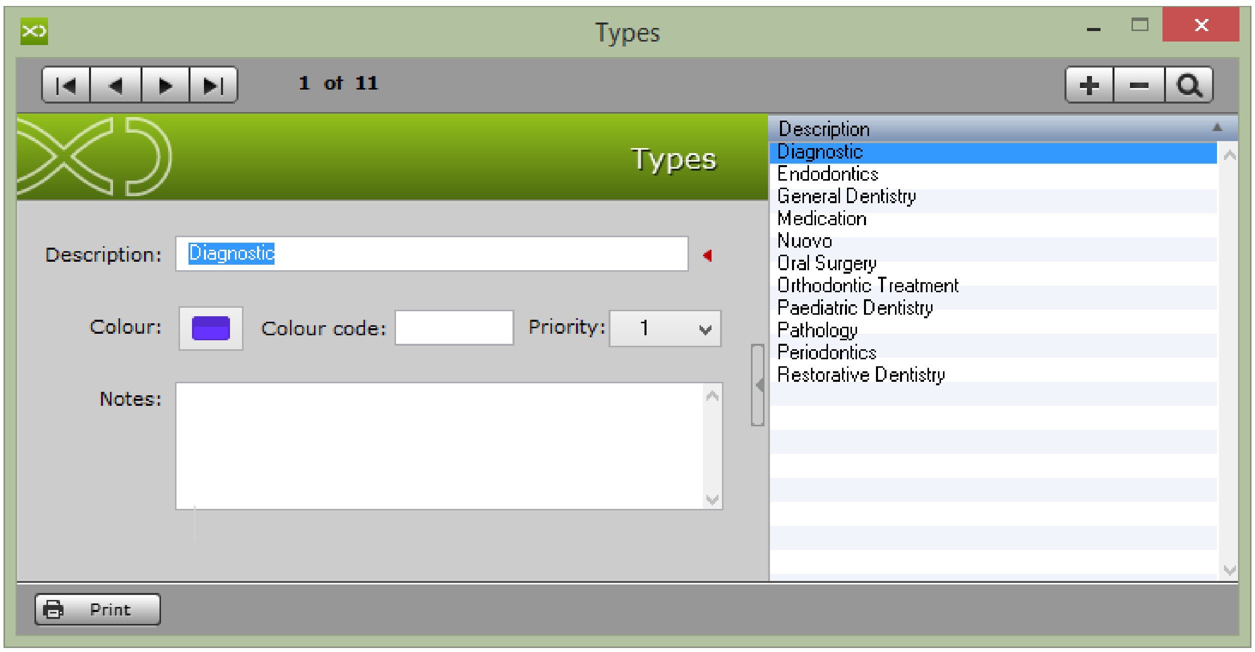


6.2. Treatment Types

How to create New Treatment Types in XDent?

Archive > Types

Click + to add a new treatment type, you can set colour and priority level to view in Clinical Data - Add Treatment



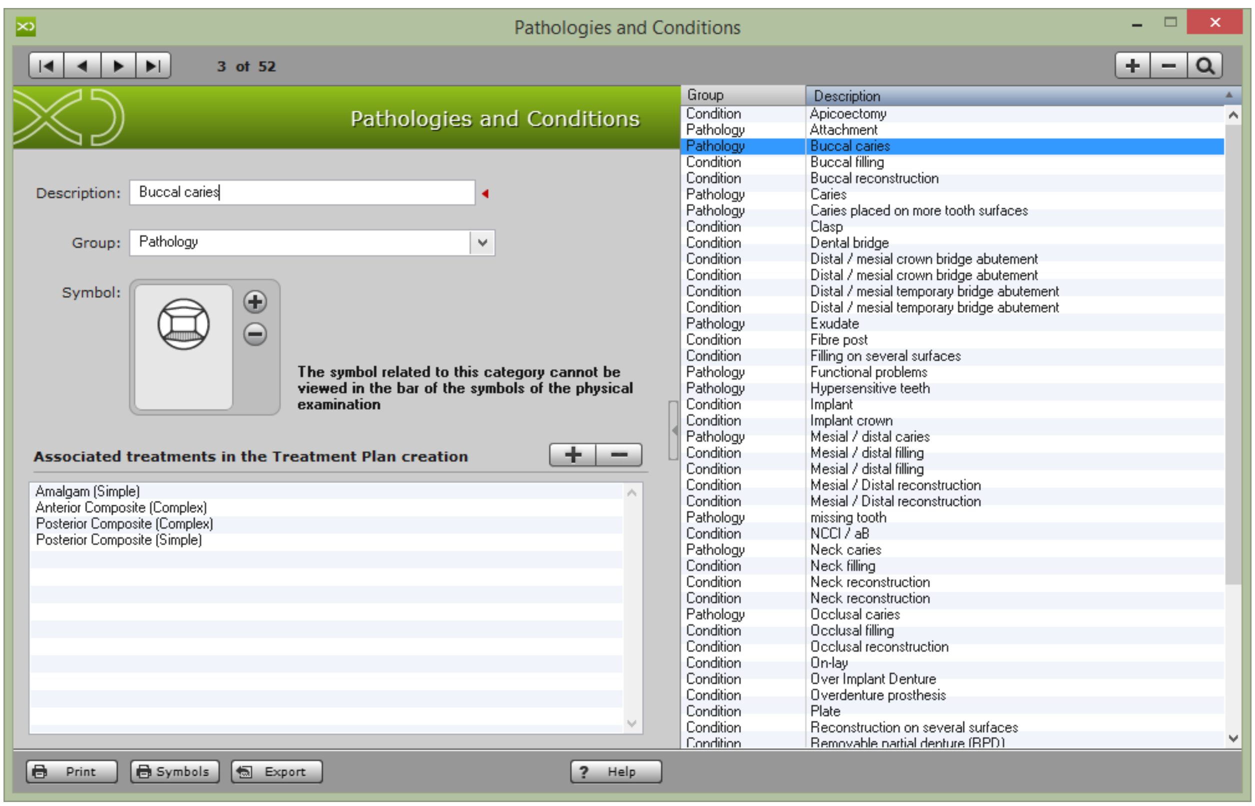
6.3. Pathologies and Conditions

How to create Pathologies and Conditions in XDent?

Archive > Pathologies and Conditions
Click + to add new pathologies and conditions, enter description and select group and select symbols from the list.

It allows you to manage a patient's pathologies that can be used when a physical examination is generated to describe the patient's initial state during his first practice visit. A graphic symbol can be linked to these pathologies; this can be drag & drop on the dental chart when the patient's physical examination is generated. In the same way, with drag & drop, treatments are added to the patient's treatment plan

For reference, the system is able to print symbols and also export pathologies and conditions contained in HTML, Text and Excel format.

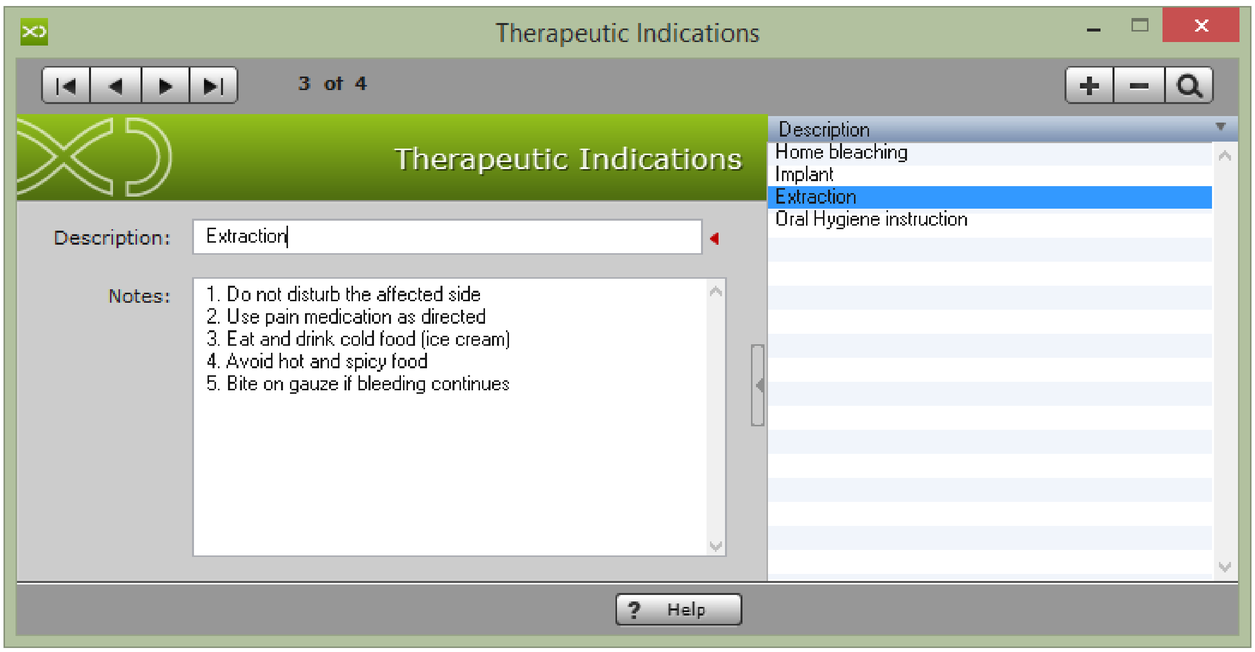


6.4. Therapeutic Indications

How to create Therapeutic Indications in XDent?

Archive > therapeutic indications
Click + to add a new therapeutic indication, enter description and notes.

It allows you to manage therapeutic indications than can be used in the treatment plans. Therapeutic indications can be associated to each treatment plan by clicking on the editing button of the treatment indicated in the treatment plan record.
All the therapeutic indications assigned to a treatment plan are available for the patient through XInfo service.

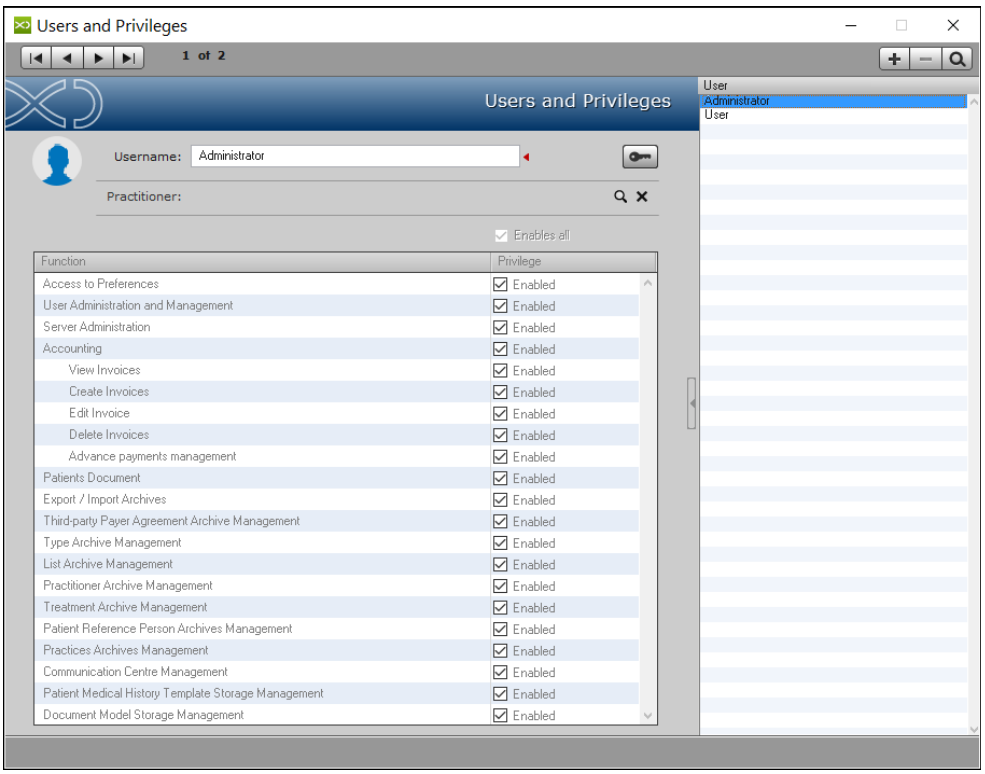


6.5. User and Privileges

How do I create new user for XDent? & How to set User and Privileges for my staff?

Archive > Users and Privileges

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

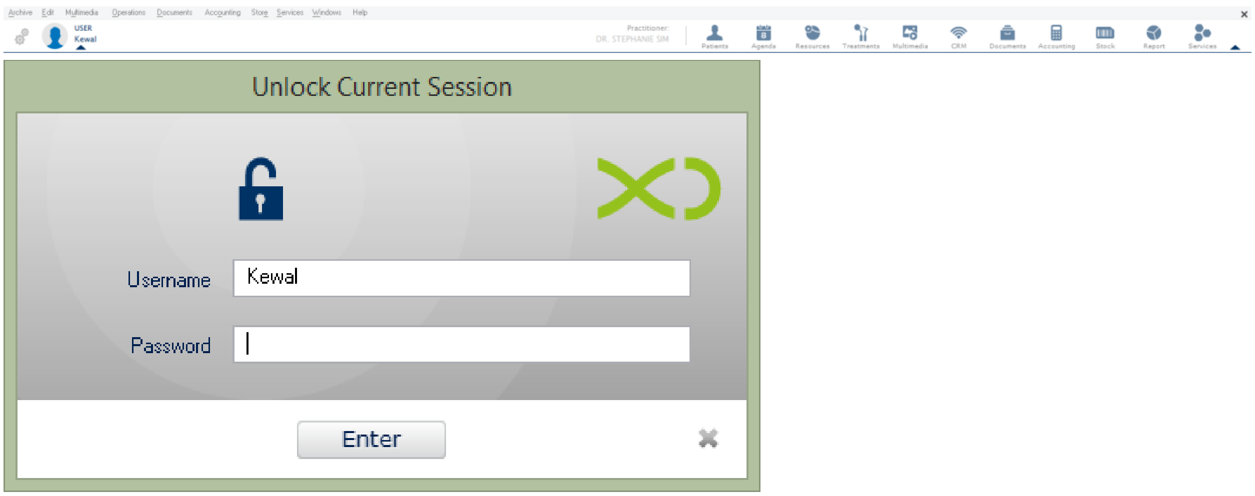


6.6. Lock Session

How do I lock my XDent session, if I am away from computer?

Archive > Lock Session

It is useful if the user is away from the computer and not using the XDent, but someone else is still able to use the computer while having no access to the current user XDent account.

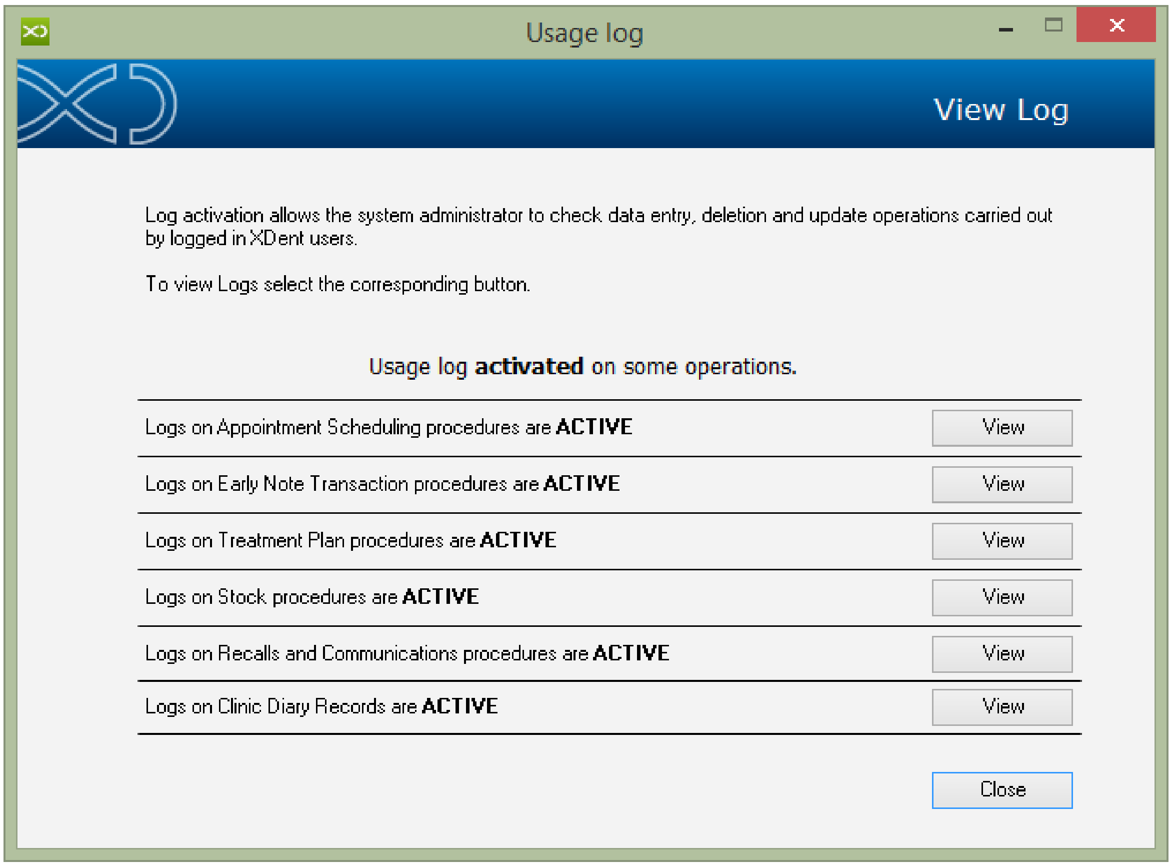


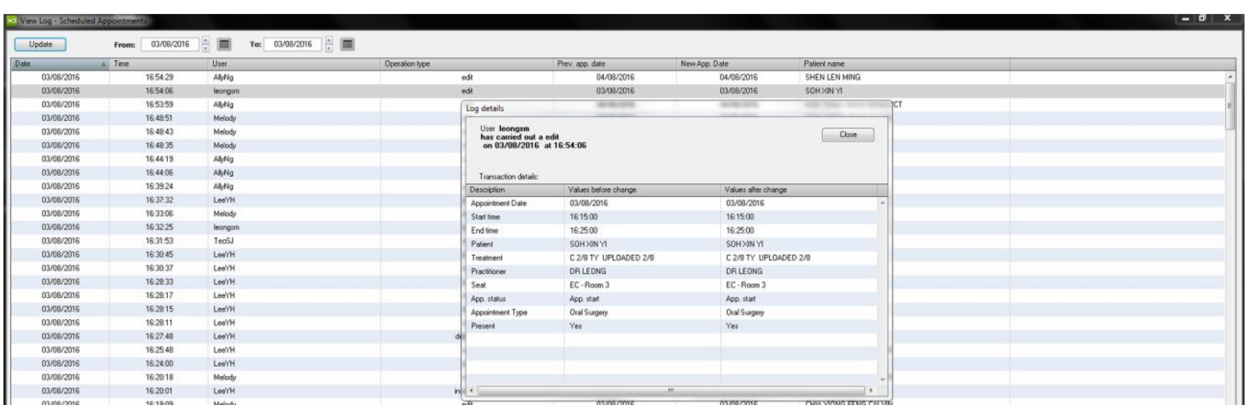
6.7. Usage Log

How to check Audit log in XDent?

Operation > Usage Log > View

It is very important to activate all the usage log, log activation allows the system administrator to check data entries, deletions and update operations carried out by a user logged in XDent.



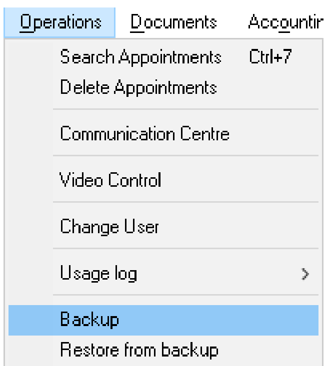


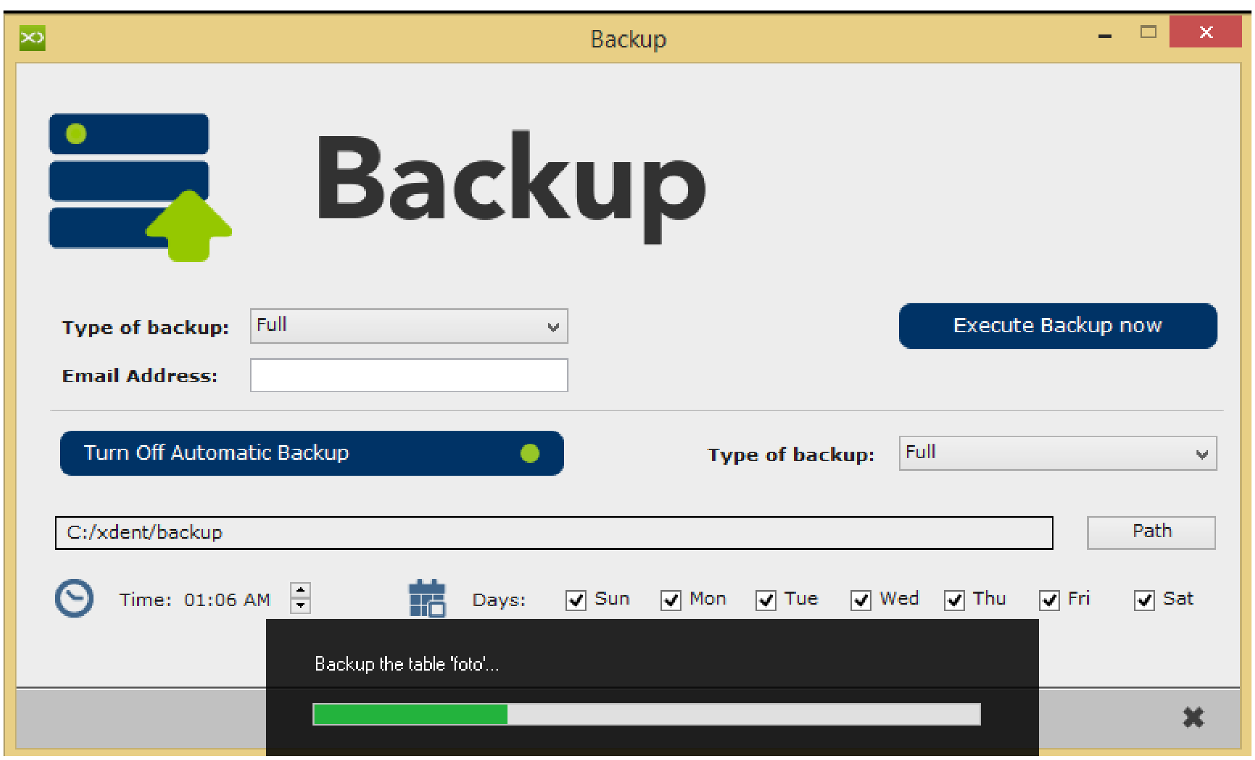
6.8. Back-Up

How to make a copy of Personal Data as Backup in XDent?

Operation > 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 auto backup.

Backups can be restored at a later time, from the menu Operations > Restore from Backup. You can select backup type like full backup or partial backup on some log, image, documents.



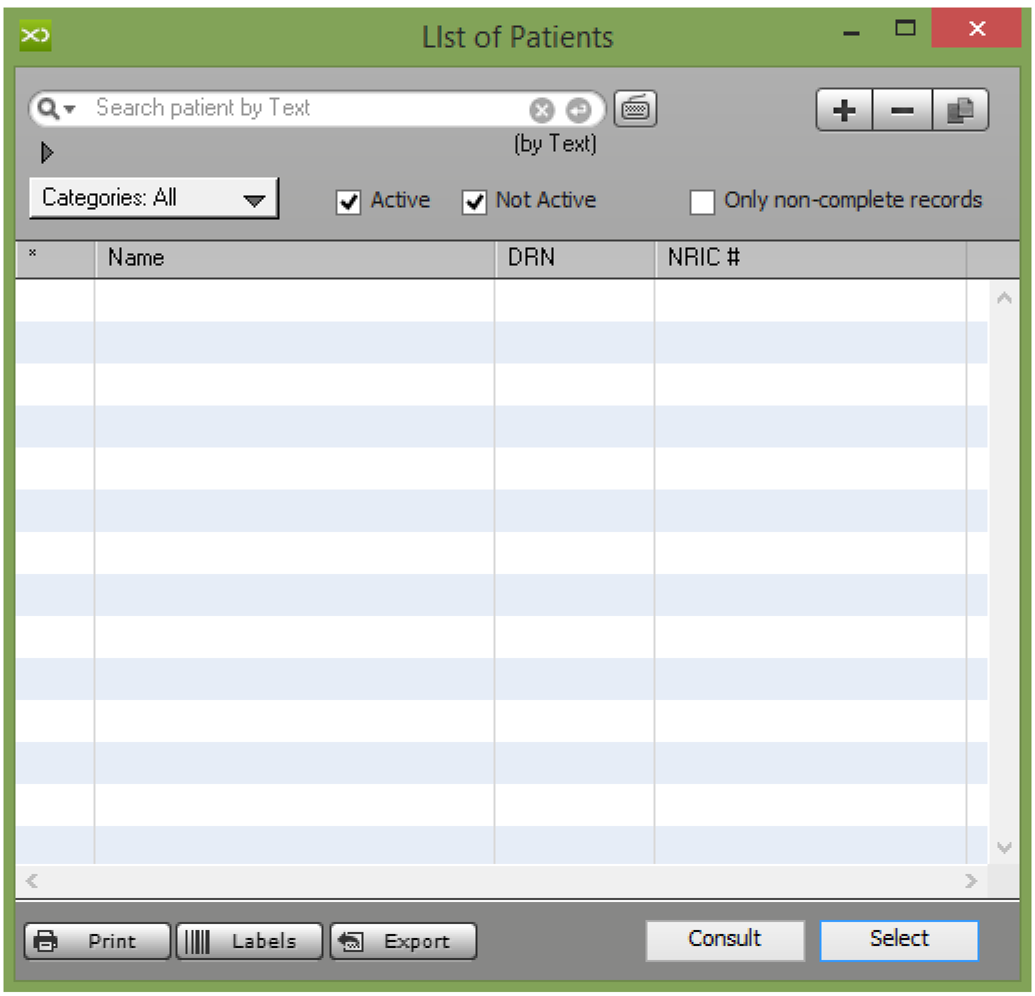


7. PATIENTS

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 “Name” value or any 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 search all fields.

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



7.1. Patients

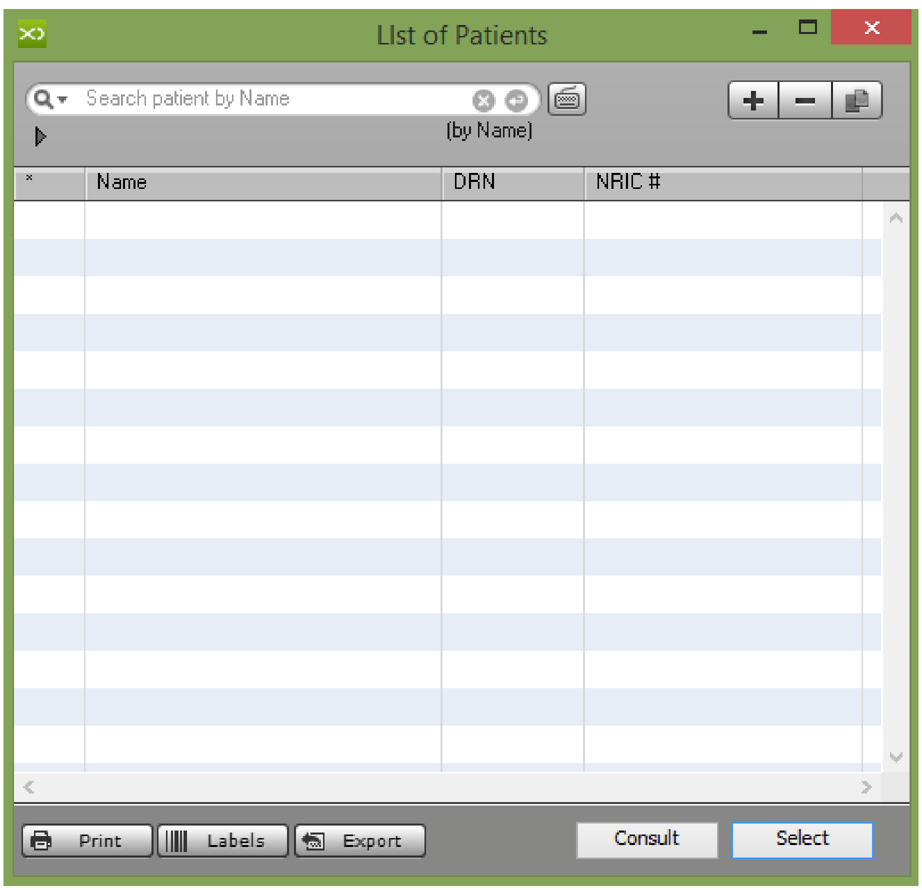
The patient record allows the User to consult all the information related to the patient; this tab provides information on clinical type, accounting, medical images, documents, forms as well as questionnaires and administration.

How to Add/Delete/Duplicate Patient in XDent?

Click on the PATIENTS button in the toolbar. To insert a new patient, 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 permanently delete a patient from the archive, select it from the list and click the "-" button. The deletion of a patient produces the elimination of all data associated with it (appointments, images, care plan, documents, etc.).

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

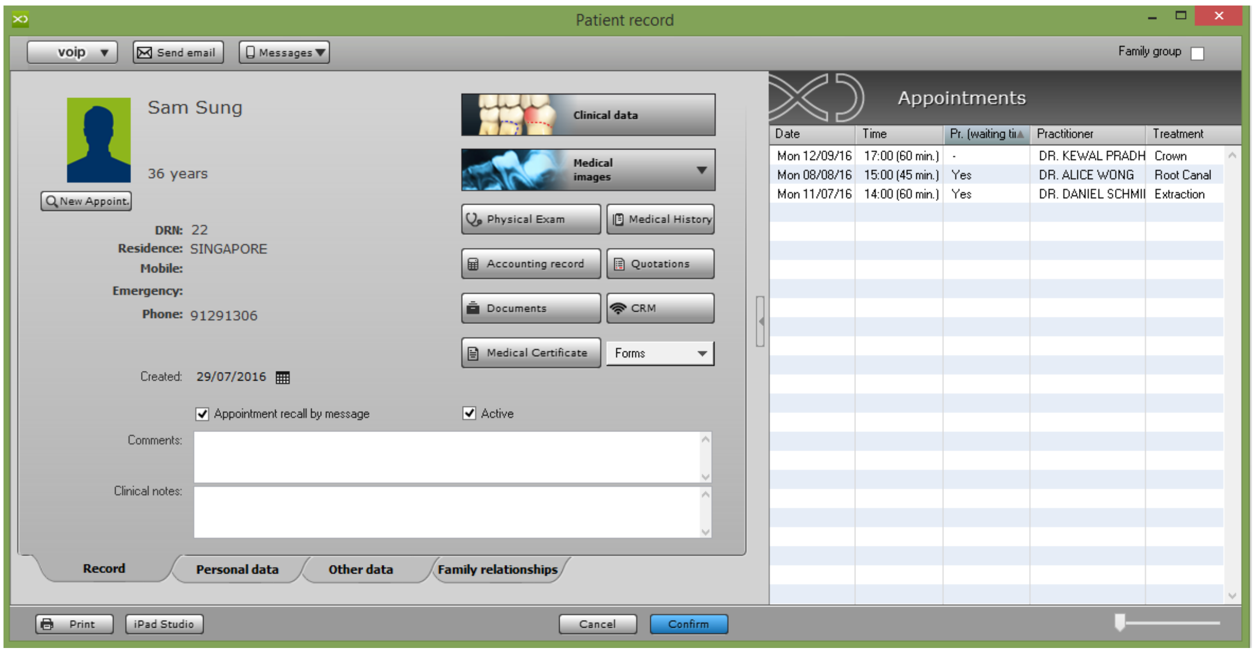


7.1.1. New Appointment

How to Fix a New Appointment for a Patient in Patient Record?

Open PATIENT RECORD, press the "New Appoint." button. Double-click on time at the day of interest. All appointment details will be indicated on the right Appointment tab, showing new and past appointments.

See details in section PLANNING WEEKLY / DAILY. (Refer #8)

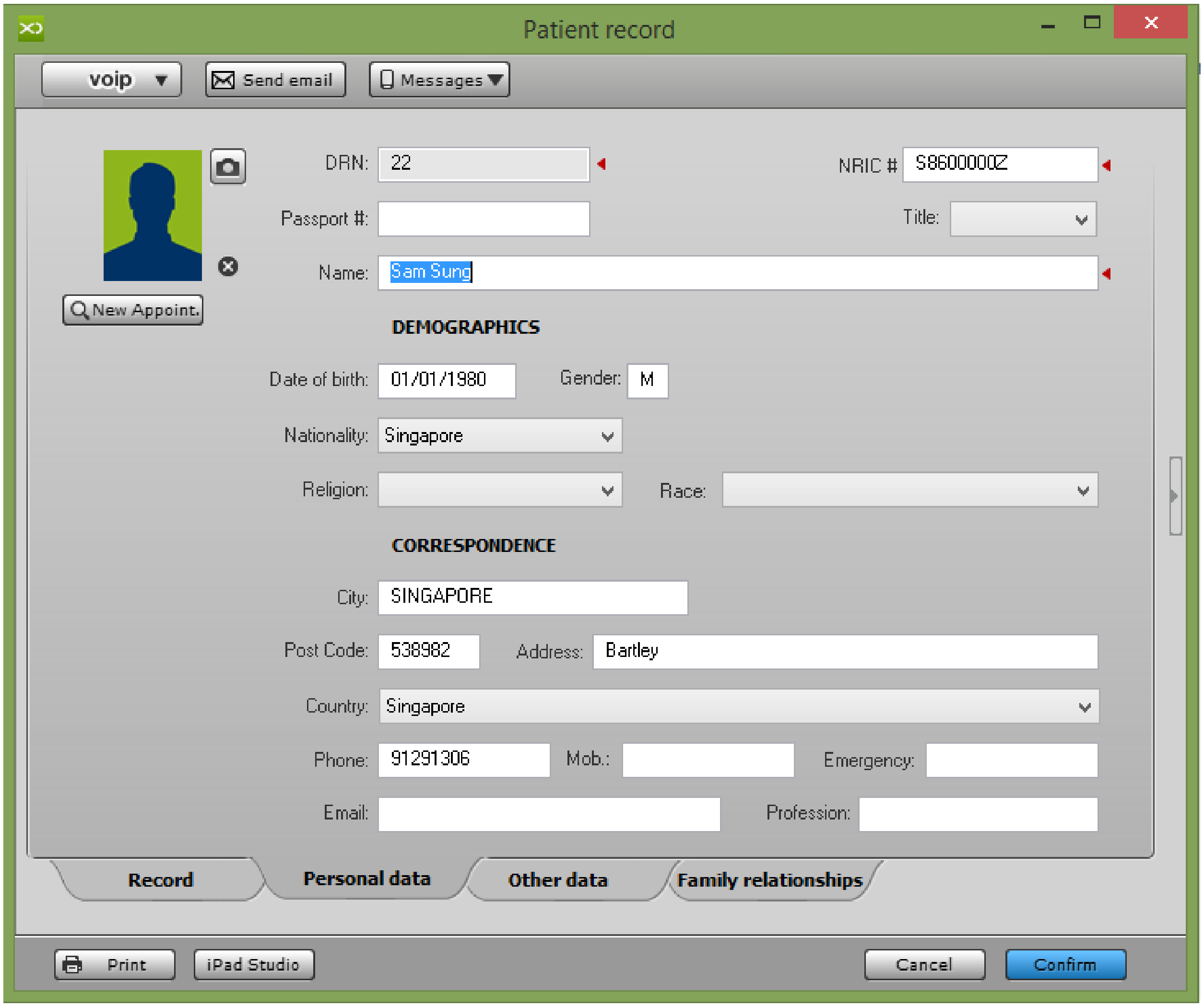


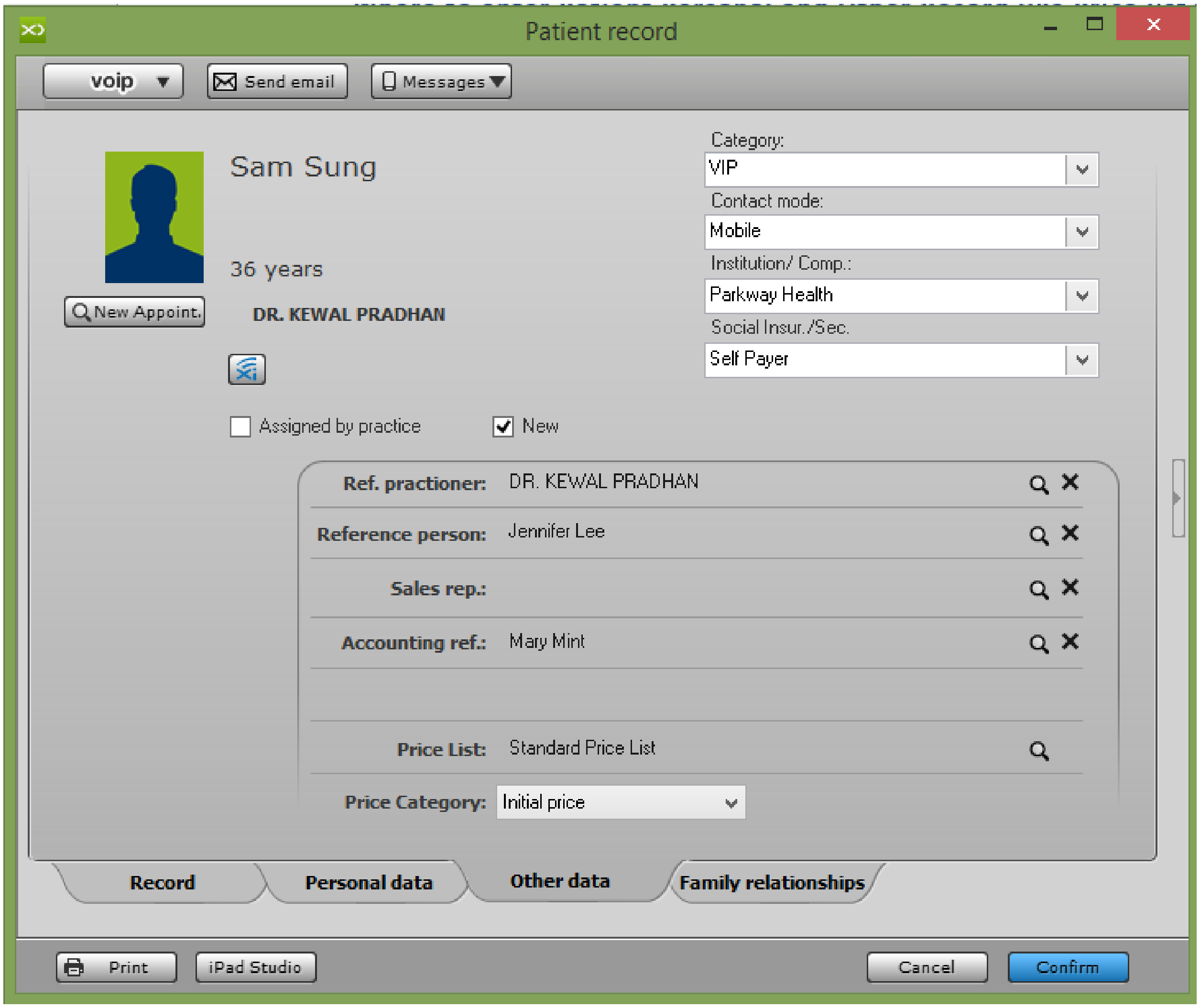
Alternatively, go to 'Agenda' in the toolbar, select one of the schedules (weekly, daily, etc.) and double click the requested time in the schedule.

7.1.2. Personal and Other Data

Where to enter Patient Personal and Other Record?

In Patient Record, the clinic administrator can manage patient data as inserted in the "PERSONAL DATA" and “OTHER DATA” tab accessible via the appropriate button.

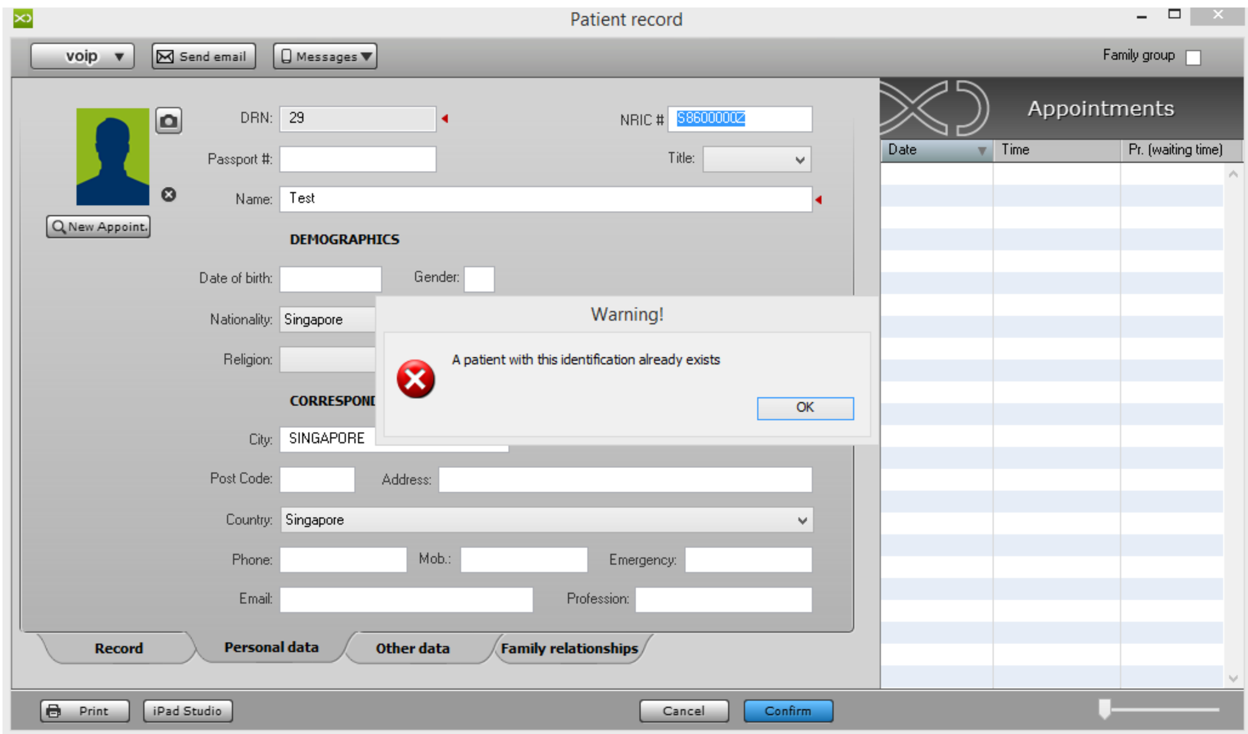


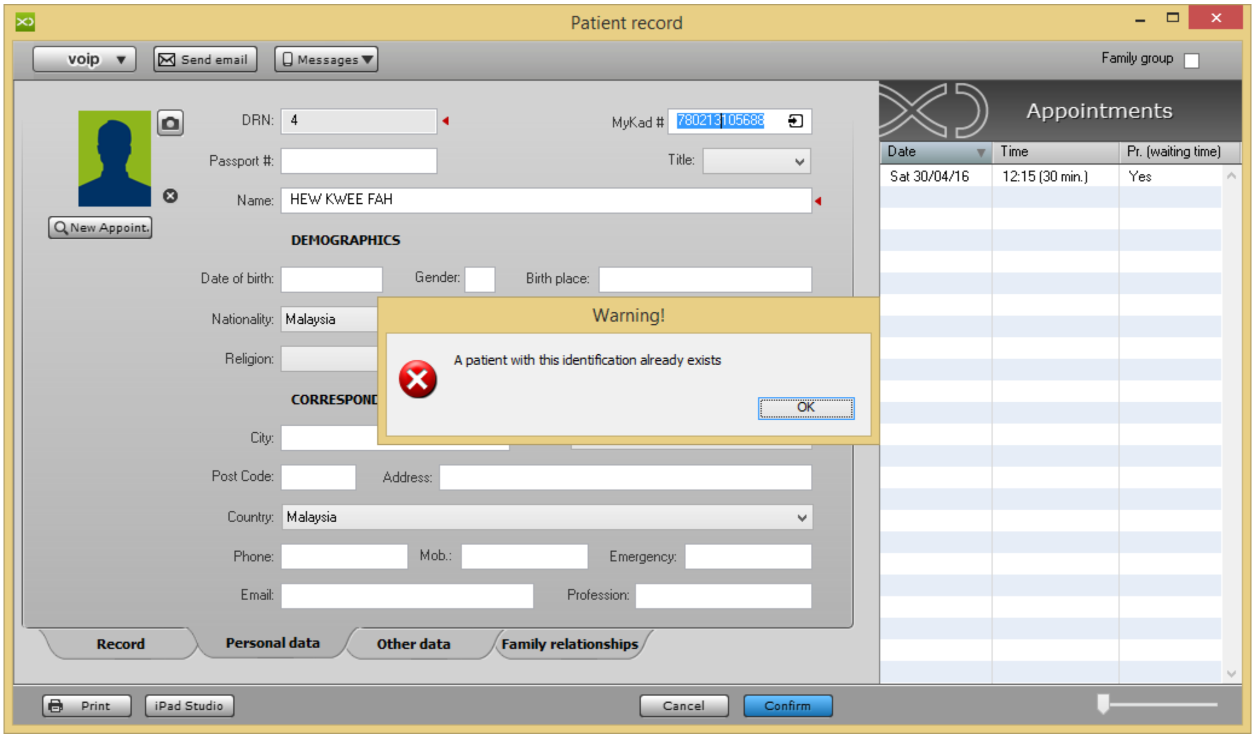

Patient record
voip
Send email
Messages
Sam Sung
36 years
New Appoint.
DR. KEWAL PRADHAN
Category:
VIP
Contact mode:
Mobile
Institution/ Comp.:
Parkway Health
Social Insur./Sec.
Self Payer
Assigned by practice
New
Ref. practioner: DR. KEWAL PRADHAN
Reference person: Jennifer Lee
Sales rep.:
Accounting ref.: Mary Mint
Price List: Standard Price List
Price Category: Initial price
Record
Personal data
Other data
Family relationships
Print
iPad Studio
Cancel
Confirm

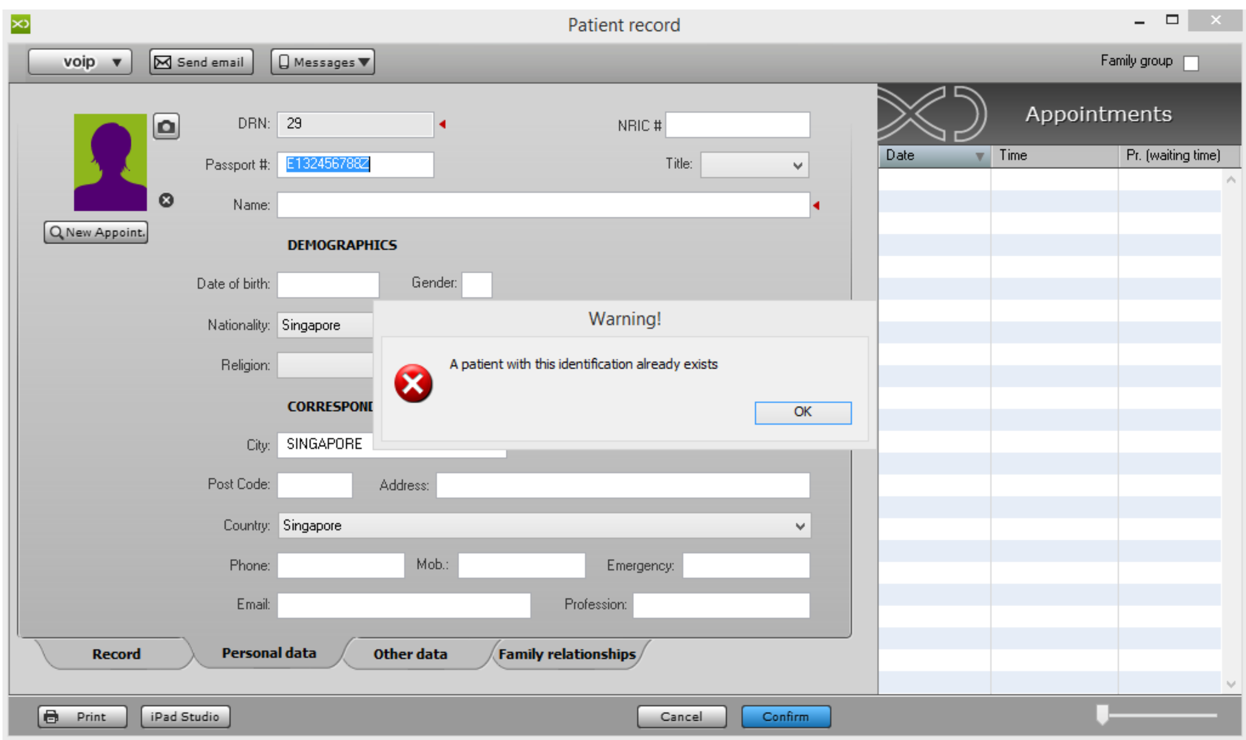
How to lookup for Duplicate Patient Record in XDent?

Use NRIC # / MyKad # or Passport # field in the Patient record to check with DB and prompt message if the Patient NRIC / MyKad or Passport already exist in the System.

Duplicate lookup Control is done directly when the user enter duplicate NRIC / MyKad or passport # field. In this way the user is immediately prompted about the data duplication after completing field editing. The check on DB data will be done if user edit the next field and even click outside the target field.



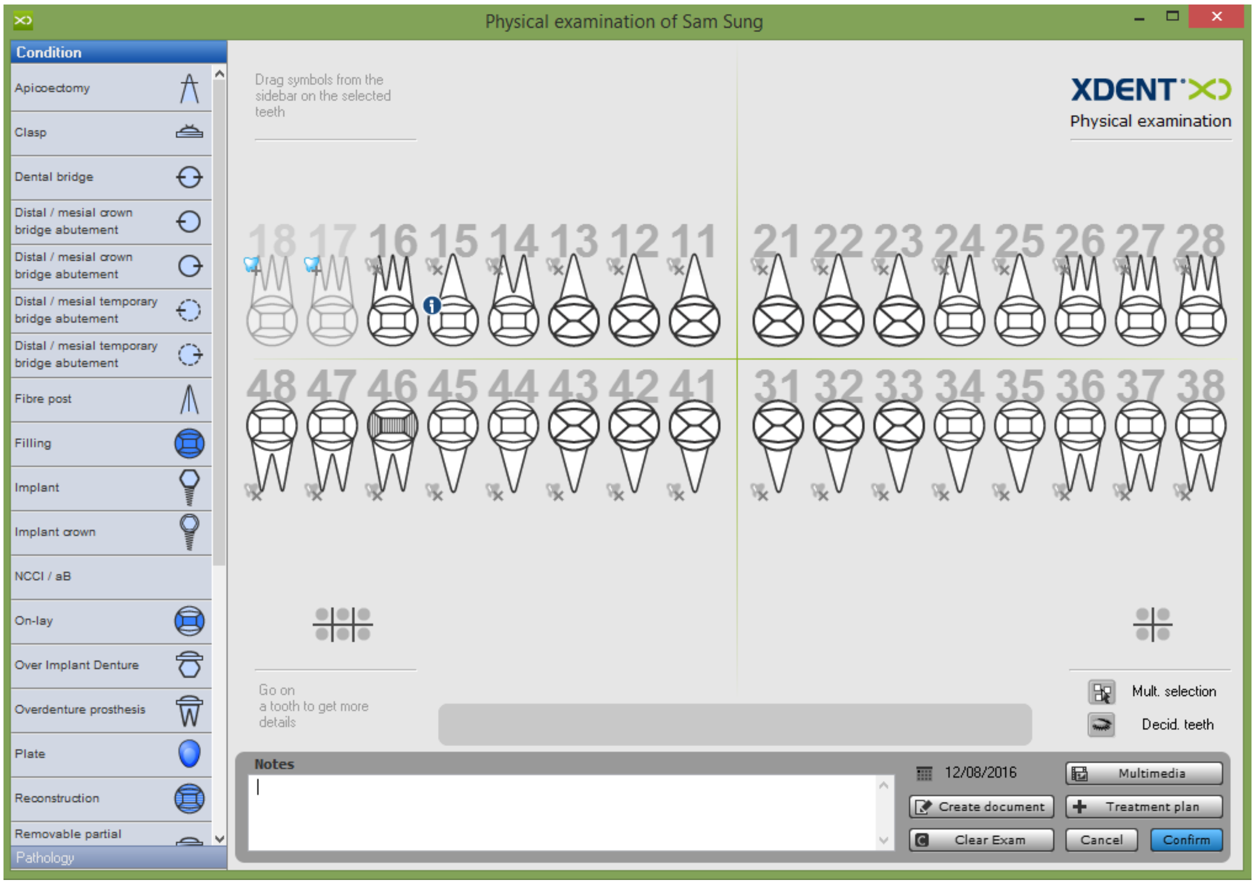

Patient record
voip
Send email
Messages
Family group
DRN: 4
MyKad # 780213105688
Passport #:
Title:
Name: HEW KWEE FAH
New Appoint.
DEMOGRAPHICS
Date of birth:
Gender:
Birth place:
Nationality: Malaysia
Religion:
CORRESPOND
City:
Post Code:
Address:
Country: Malaysia
Phone:
Mob.:
Emergency:
Email:
Profession:
Warning!
A patient with this identification already exists
OK
Appointments
Date
Time
Pr. (waiting time)
Sat 30/04/16
12:15 (30 min.)
Yes
Record
Personal data
Other data
Family relationships
Print
iPad Studio
Cancel
Confirm


Patient record
voip
Send email
Messages
Family group
DRN: 29
NRIC #
Passport #: E1324567882
Title:
Name:
New Appoint.
DEMOGRAPHICS
Date of birth:
Gender:
Nationality: Singapore
Religion:
CORRESPOND
City: SINGAPORE
Post Code:
Address:
Country: Singapore
Phone:
Mob.:
Emergency:
Email:
Profession:
Warning!
A patient with this identification already exists
OK
Appointments
Date
Time
Pr. (waiting time)
Record
Personal data
Other data
Family relationships
Print
iPad Studio
Cancel
Confirm

7.1.3. Physical Exam

How to Add a Physical Exam for a New Patient in XDent?

The function PHYSICAL EXAM allows Practitioner to document the state of the mouth detected at the first visit.



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.

 → Caries

 → Filing

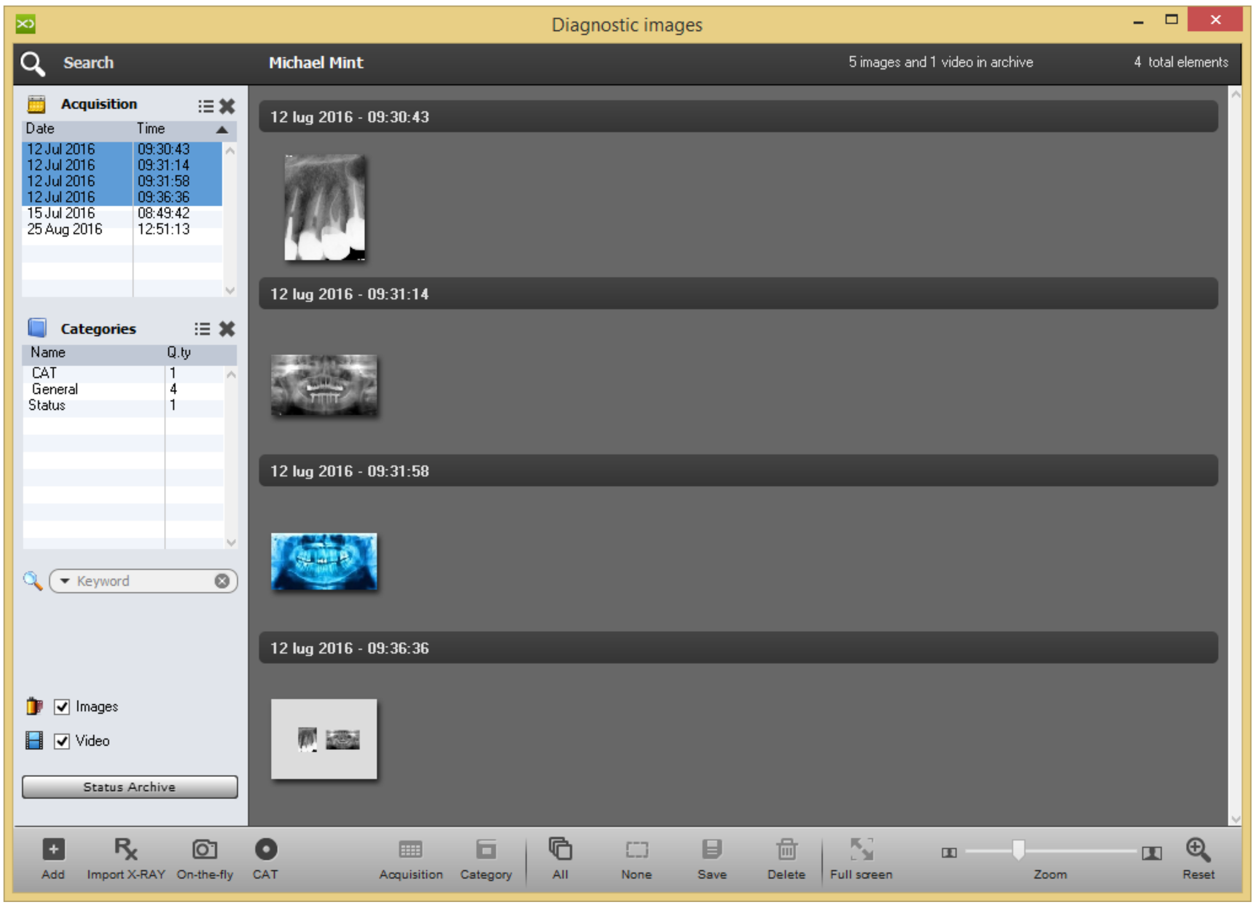
 → Reconstruction

It is possible to add new pathologies and conditions from the menu Archive/Pathologies and Conditions. (Refer #6.3)

7.1.4. Medical Images

How to View Medical Images and Video from the Patient Record?

Patient Multimedia Archive window shows a list of thumbnails of the stored images that can be filtered by acquisition event, category or keyword. Every thumbnail can be selected to be edited or displayed in a picture-comparison window.

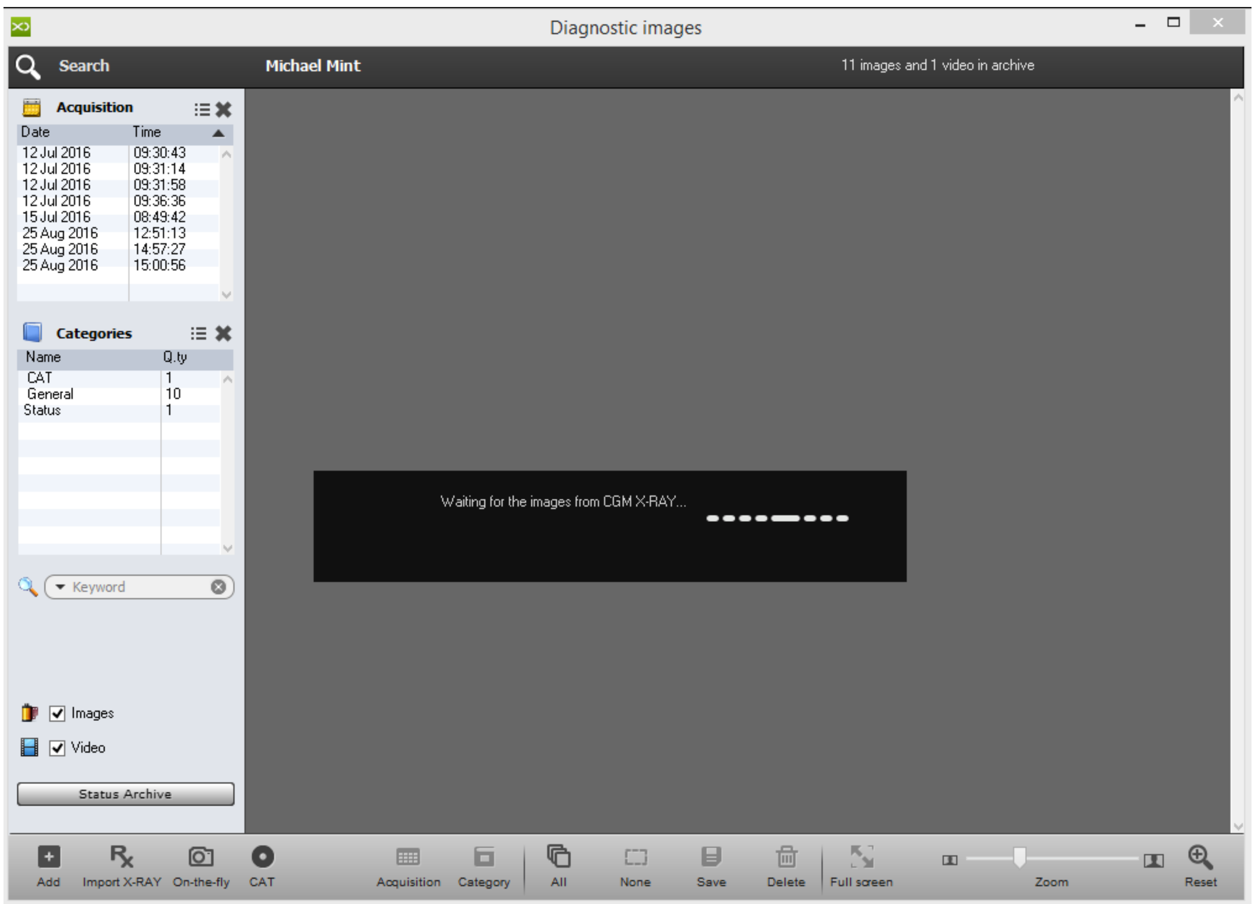


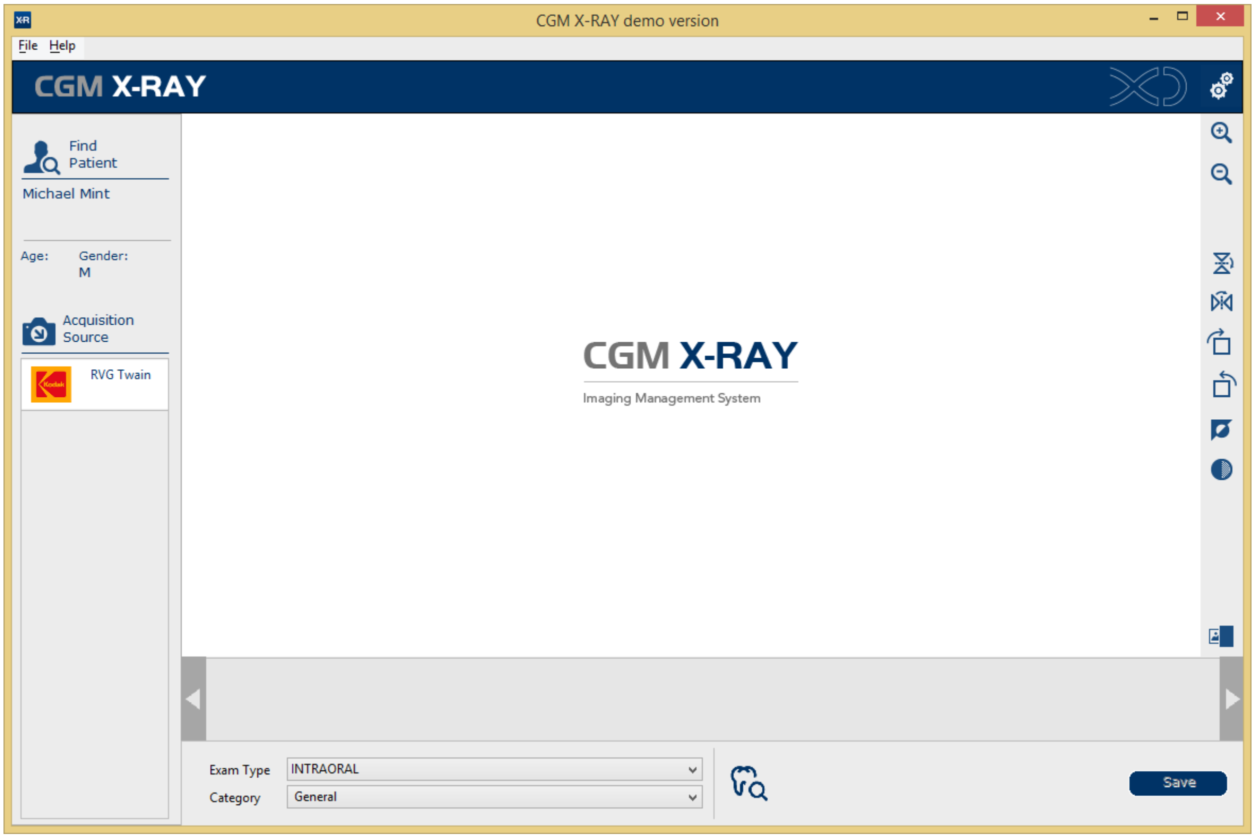
How to Import X-Ray for a Patient in XDent?

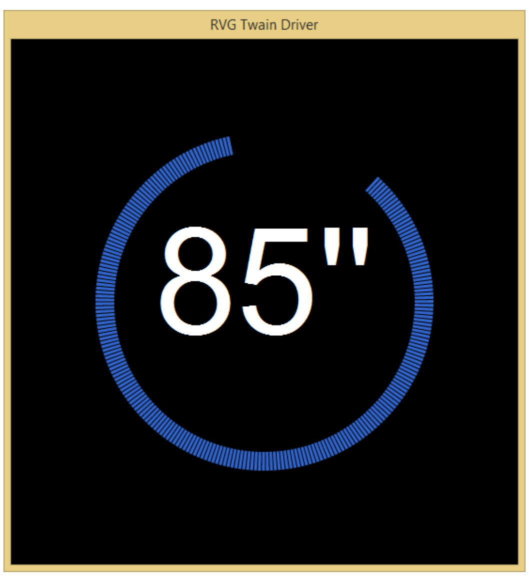
X-Ray import is based on XDENT integrated with XRAY scans software on PACS server. This important function allows you to quickly search and acquire the patient scans.

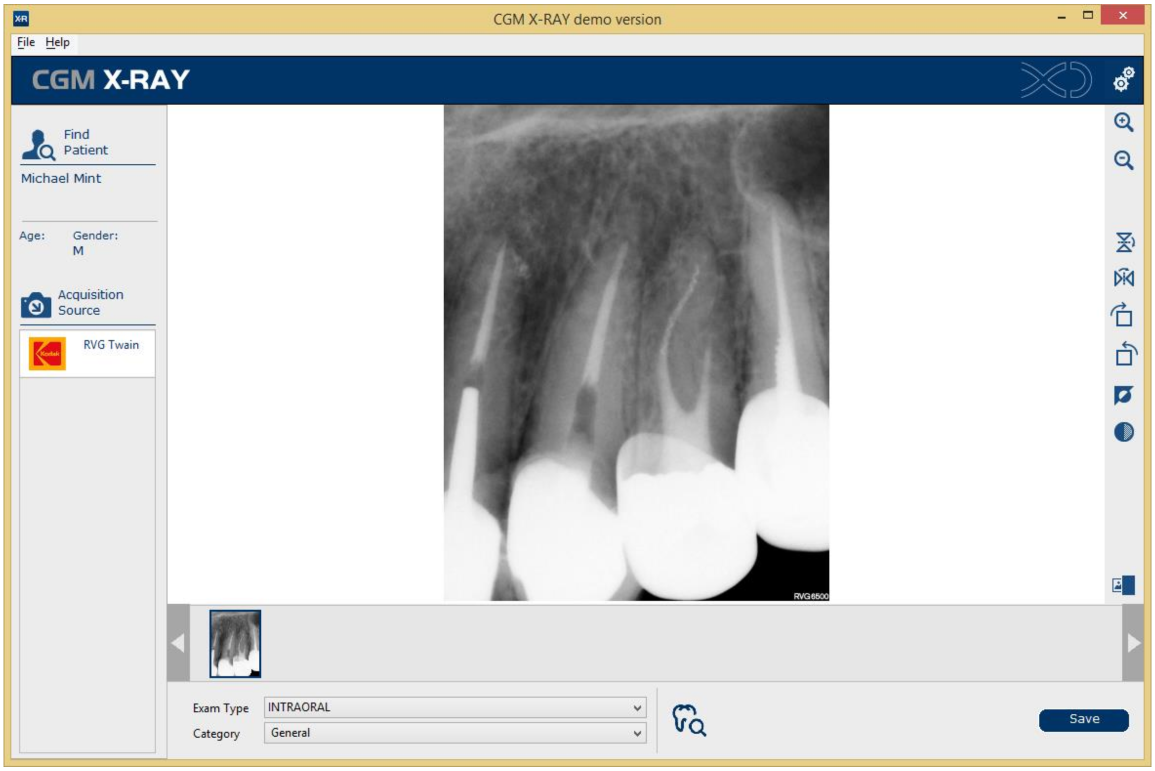
Once the procedure is enabled, the user can keep on working on XDENT during acquisition. When the acquisition procedure is complete, the patient multimedia archive will contain a reference to the scan acquired.

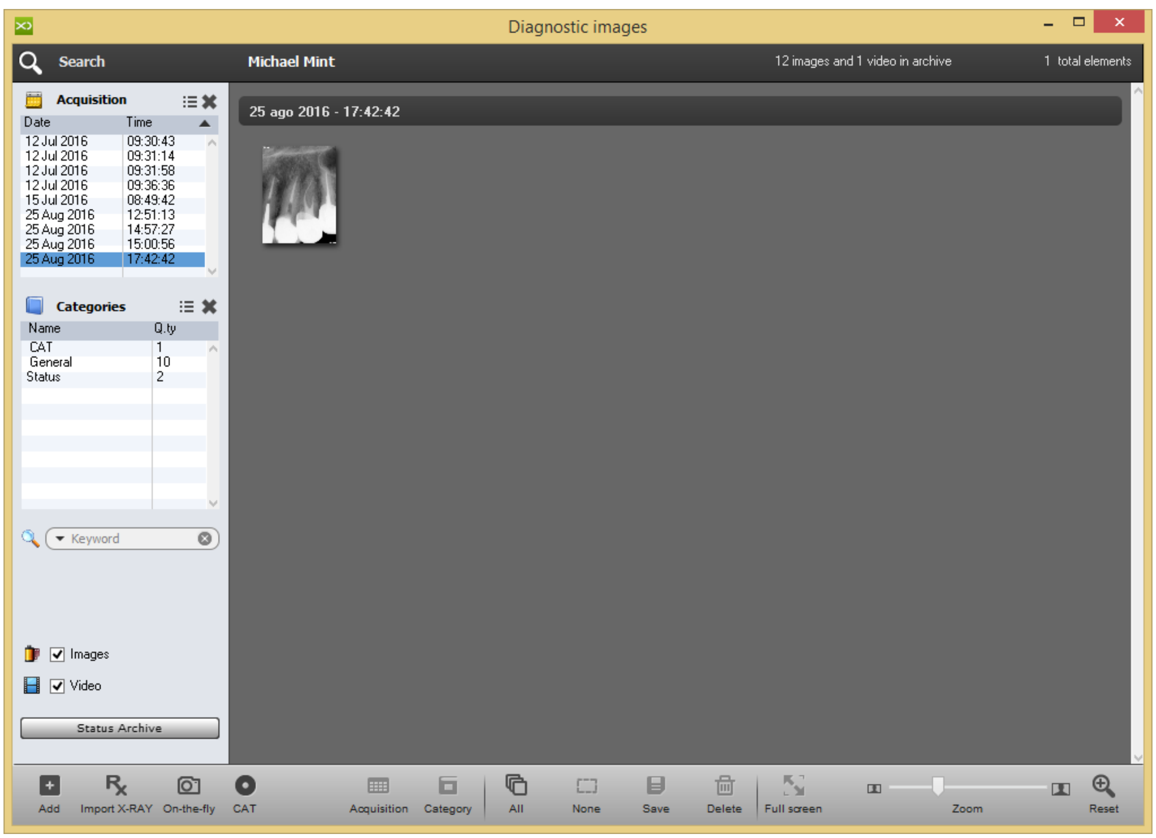
Click Import X-Ray on bottom right side and it will open CGM X-RAY and then click the Acquisition Source. Once the image is acquired, select the type and category and Save it. Upon saving the image it will be copied in Patient Multimedia Record.




CGM X-RAY demo version
File
Help
CGM X-RAY
Find Patient
Michael Mint
Age:
Gender:
M
Acquisition Source
RVG Twain
CGM X-RAY
Imaging Management System
Exam Type
INTRAORAL
Category
General
Save


RVG Twain Driver
85''


CGM X-RAY demo version
File Help
CGM X-RAY
Find Patient
Michael Mint
Age:
Gender: M
Acquisition Source
RVG Twain
Exam Type INTRAORAL
Category General
Save

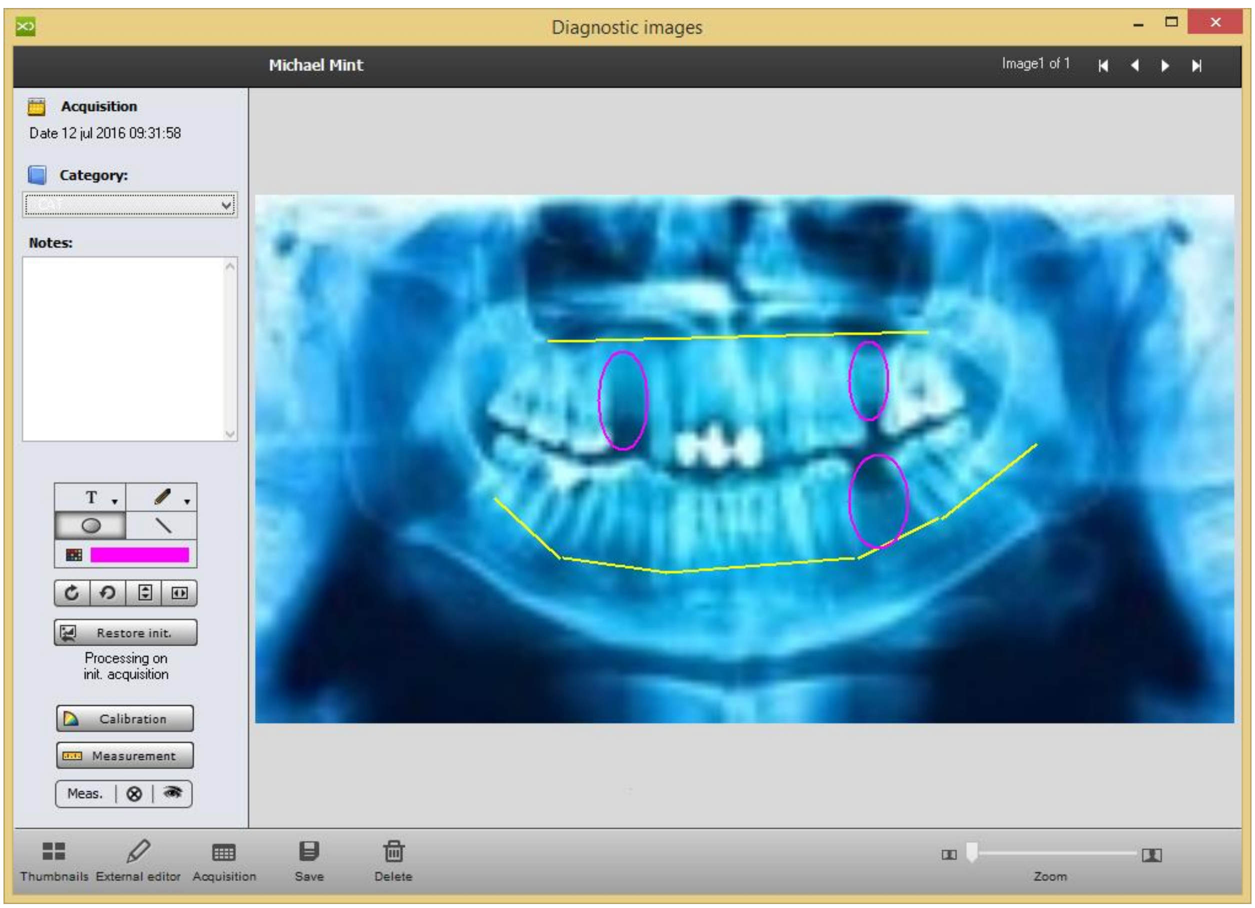

Diagnostic images
Search
Michael Mint
12 images and 1 video in archive
1 total elements
Acquisition
Date Time
12 Jul 2016 09:30:43
12 Jul 2016 09:31:14
12 Jul 2016 09:31:58
12 Jul 2016 09:36:36
15 Jul 2016 08:49:42
25 Aug 2016 12:51:13
25 Aug 2016 14:57:27
25 Aug 2016 15:00:56
25 Aug 2016 17:42:42
25 ago 2016 - 17:42:42
Categories
Name Q.ty
CAT 1
General 10
Status 2
Keyword
Images
Video
Status Archive
Add
Import X-RAY
On-the-fly
CAT
Acquisition
Category
All
None
Save
Delete
Full screen
Zoom
Reset

How to Edit Dental Image for the Patient in XDent?

Multimedia Archive of each patient is provided with tools to edit images and to carry out measurements.
By clicking the thumbnail of the medical imaging, the editing window can be accessed and the following tools can be used to

- Turn the image clockwise and anticlockwise
- Mirror the image vertically and horizontally
- Put a note on the image
- Highlight some parts of the image
- Draw circles
- Draw straight lines.

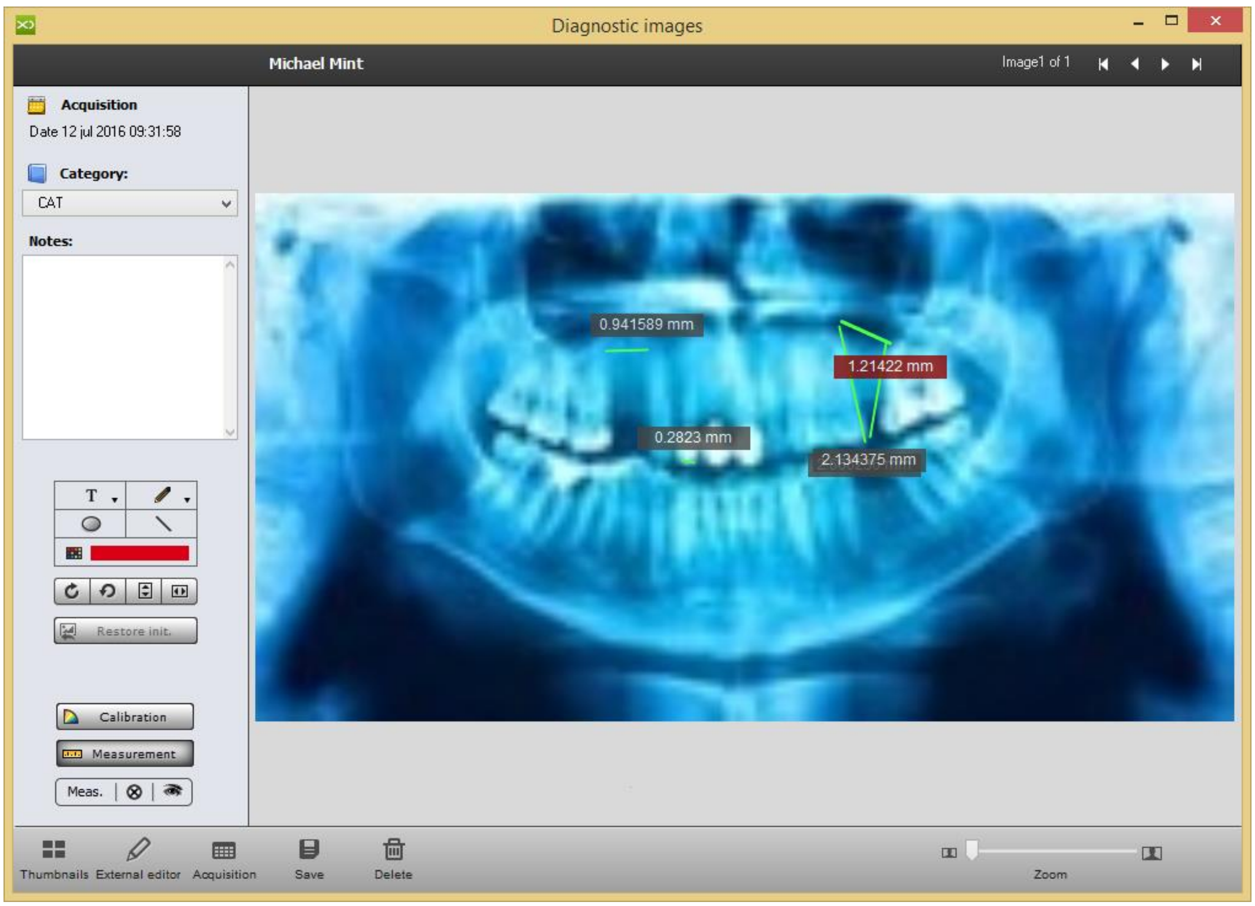
All the tools are associated with a list of colors from which to choose the color corresponding to the tool used. The editing operations on the image modify permanently the image itself.



In order to carry out the measurements on the image, it is necessary to carry out the calibration. Such an operation allows you to correctly detect measurements.

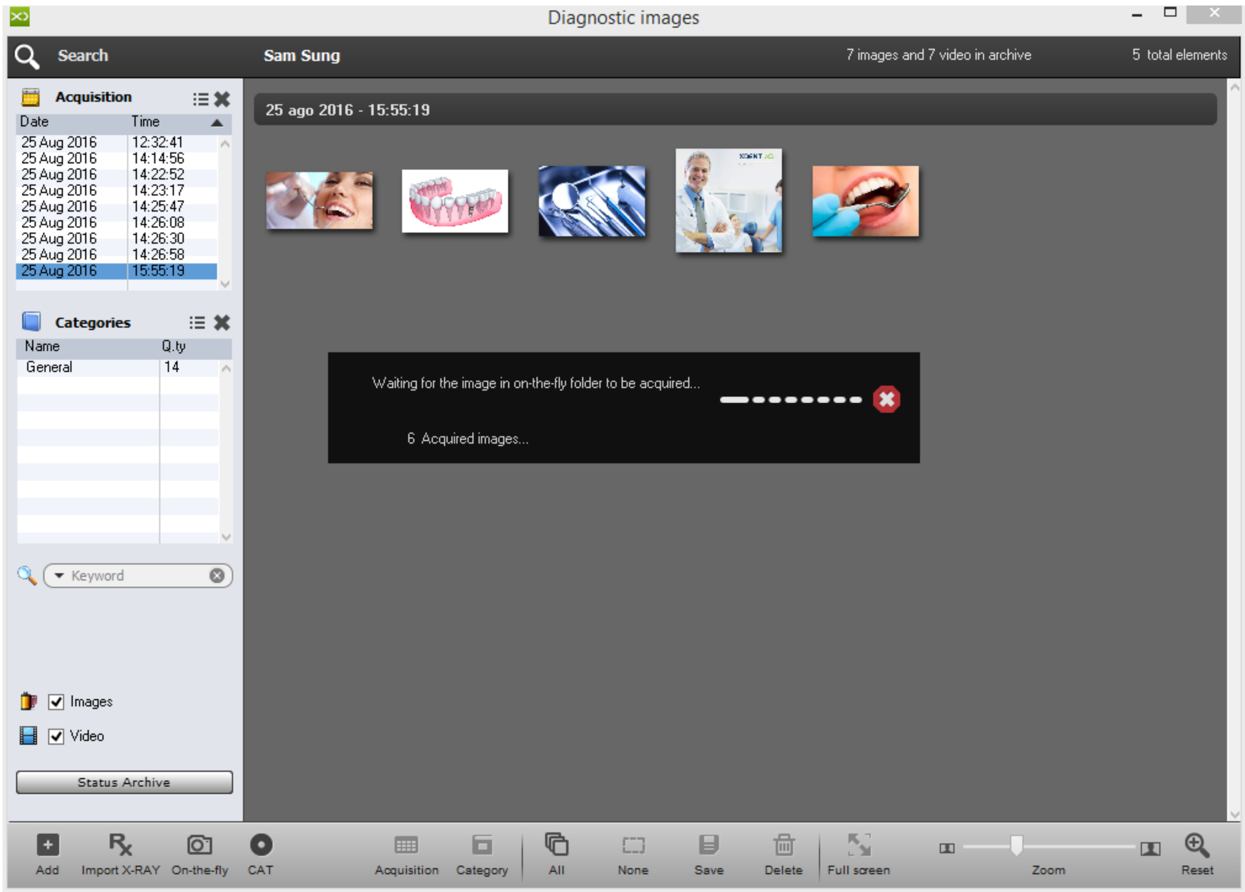
During a measurement, XDENT automatically signals the need to calibrate, if necessary.

The measurements carried out on the image are overlapped and can be seen or hidden by clicking a button. Each single measurement can be moved by dragging the measuring field with the mouse. A measurement can be cancelled by right clicking the measuring field. In order to cancel all measurements, use the button in the editing tools palette.



How to Acquire OnFly Image for a Patient in XDent?

By OnFly acquisition mode, XDENT waits to receive images into a target folder as defined in the settings. Setting of Folder is done from General Setting > Multimedia > On-the-Fly Capture Folder.
Such a function is designed to use the features of the new Wi-Fi SD Cards through which pictures can be taken and sent to the PC or to the Mac in Wi-Fi mode. By this mode, as soon as the PC or MAC receives the image, this is immediately acquired in the patient multimedia archive.



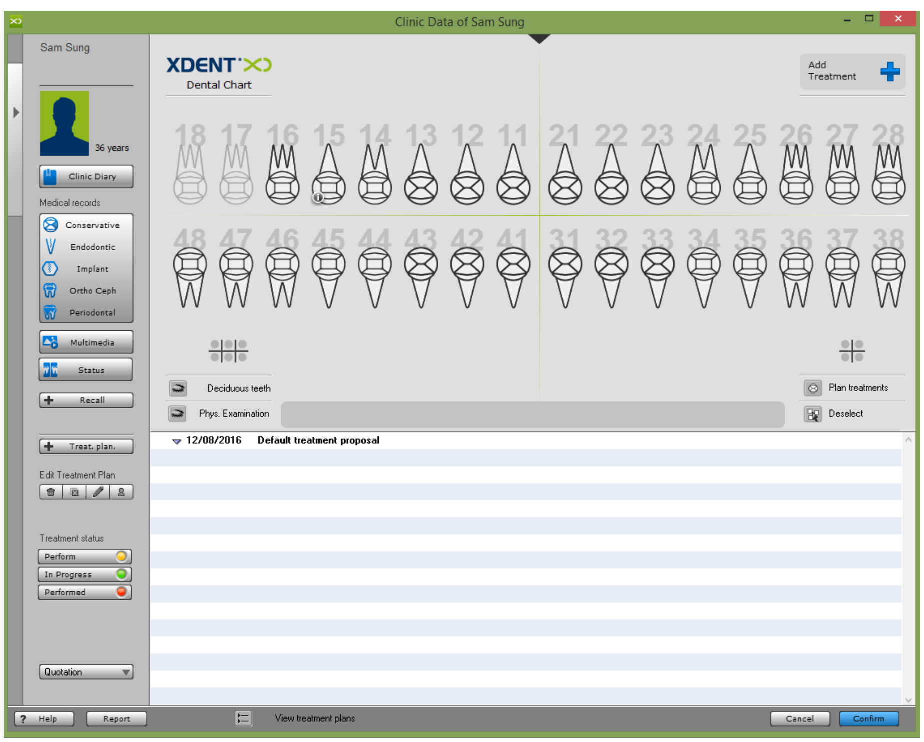
7.1.5. Clinical Data

CLINICAL DATA function provides a collection of past services to the patient and inserts those to be carried out. The main window has a gray arrow on the left from which you may access a list of services performed frequently by the clinic. To drop a charge or treatment plan in the planned treatment, 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.), 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 the entire treatment plan or individual performance and indicate the method of payment agreed with the patient.

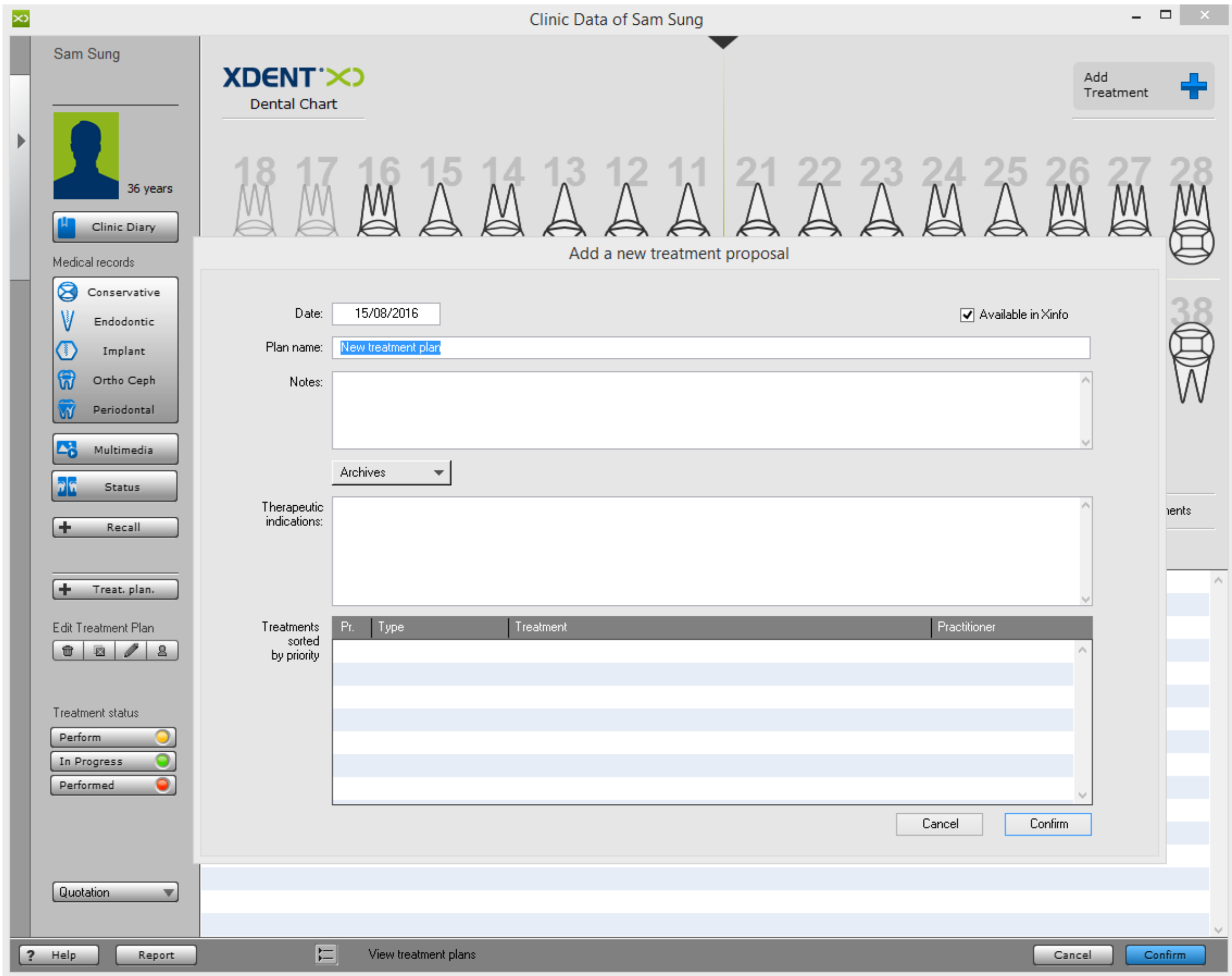
The "Create" button creates the quote ready to be printed. You can access the quotation via the button Quotations in the main Patient Record window. The state of the quote can be changed from the drop-down menu. (Refer #7.1.6)

When the doctor performs a treatment on 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 colour.



How to Create a Treatment Plan?

Open the patient's record, and press the "Clinical Data" button. On the Left hand side Click “Treatment Plan”. Practitioner is able to enter meaning name concern to the Treatment to perform and/or to plan, able to add notes and also therapeutic indication from archives (Refer #6.4)

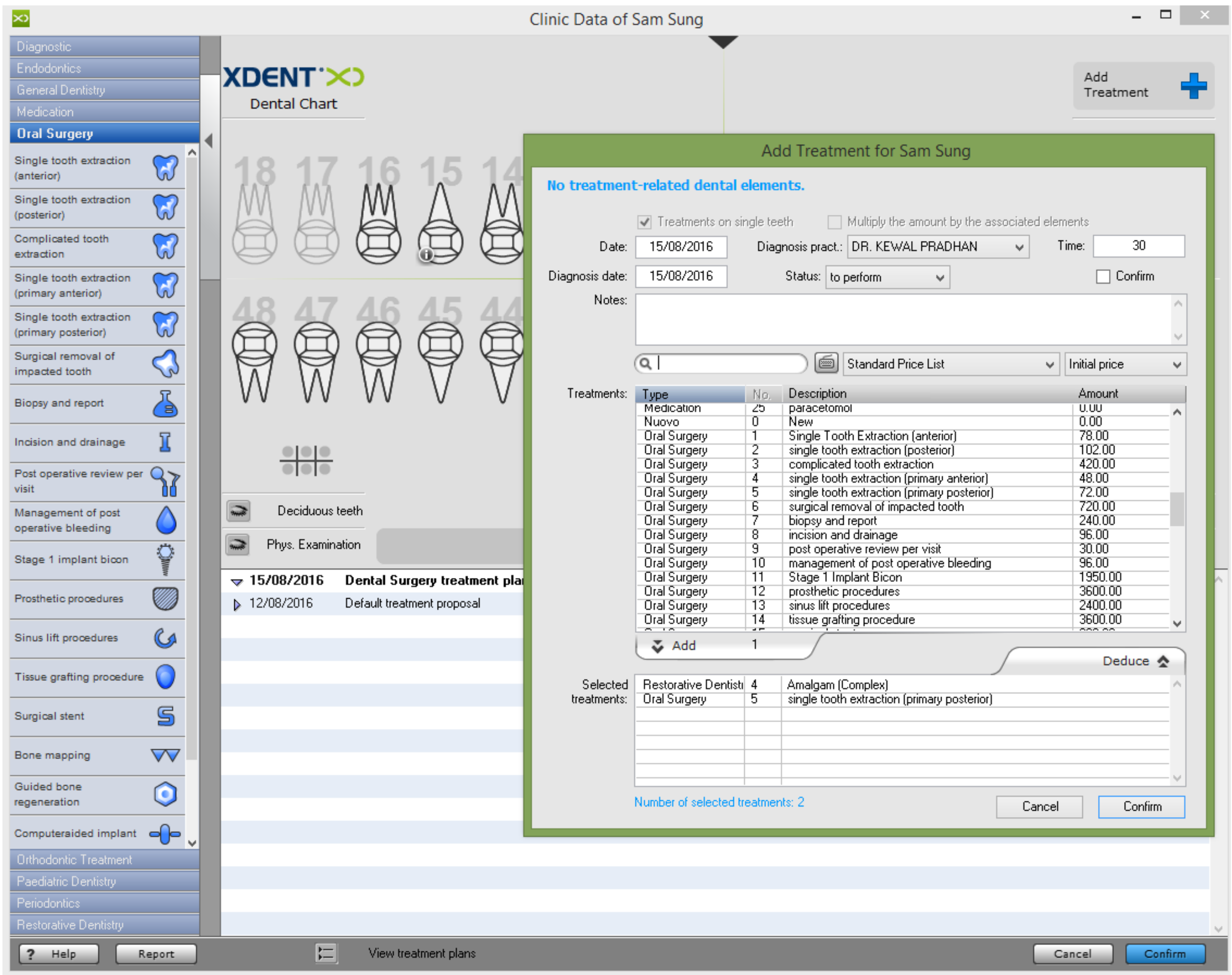


How to Add/Drop Treatments in a Treatment plan?

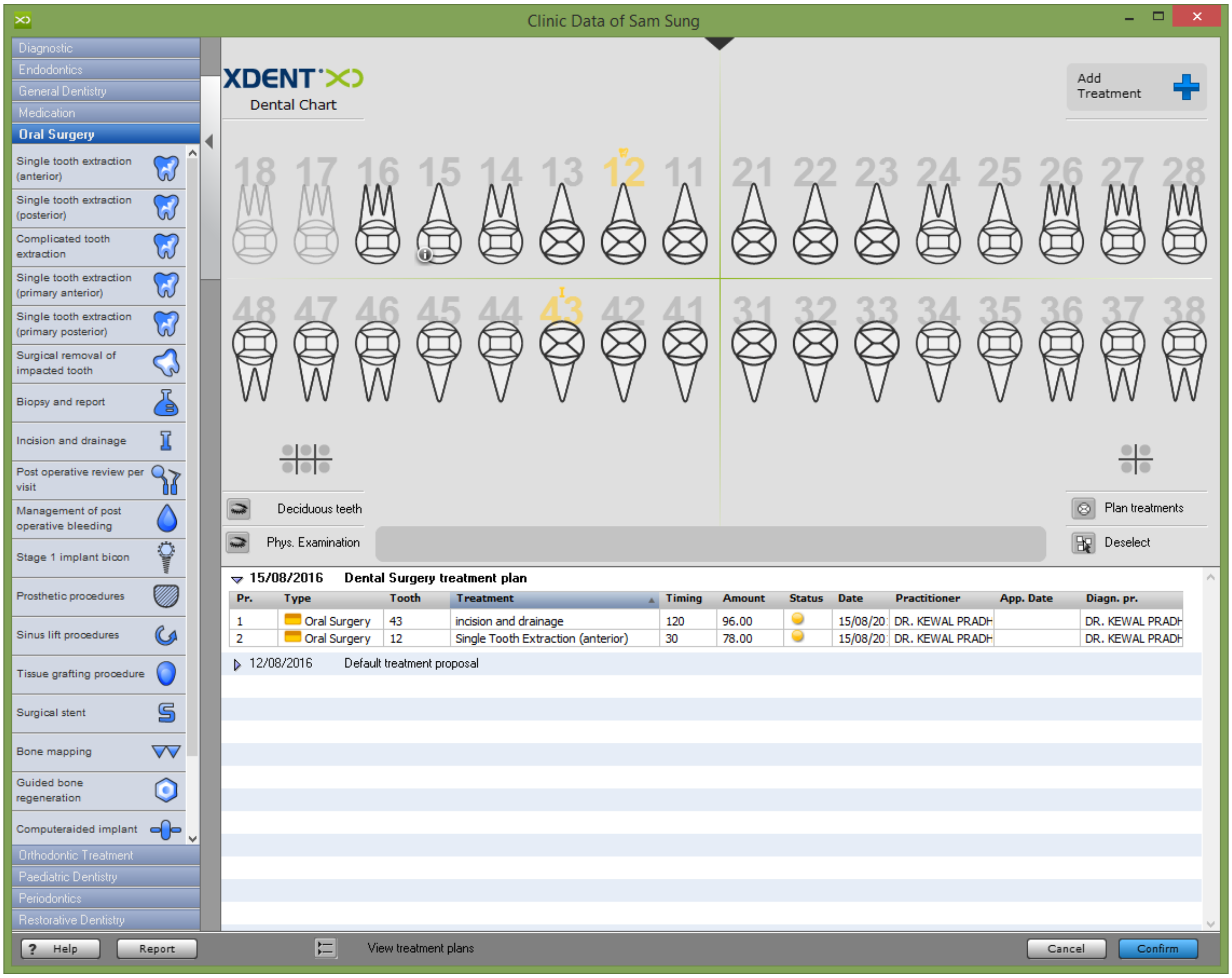
There are two ways to add/drop treatment in a treatment plan

1) On right hand side ADD TREATMENT button, select the services/treatment concerned and click "Confirm".

Here you can select pricelist, or select Practitioners before dropping the treatments



2) Drag and Drop the Symbols of the tooth from the left hand bar.



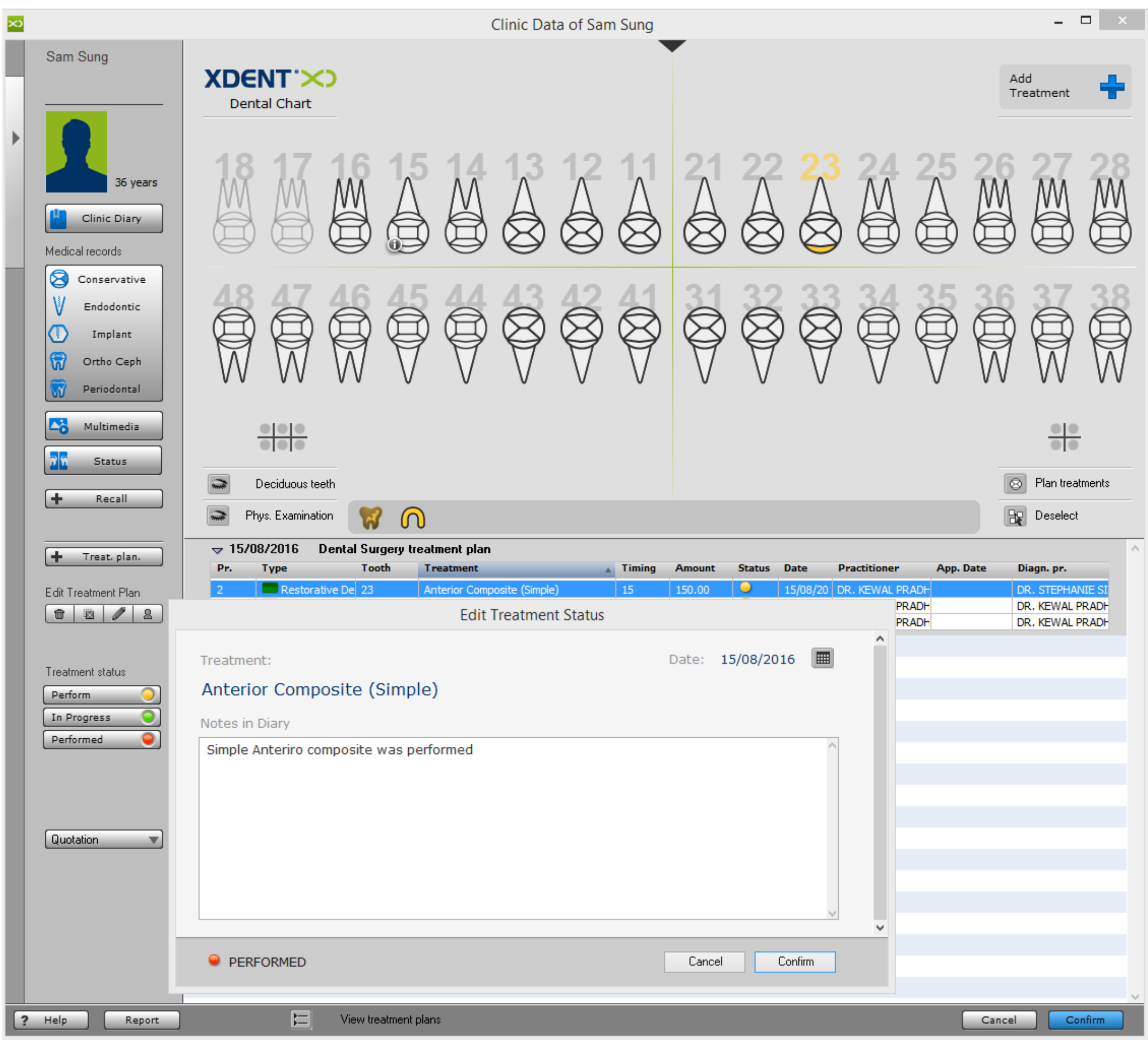
How to Change Treatment Status in XDent?

Treatments with Phases can be referred to as "In Progress" status until the full treatment is completed because it consists of regular monitoring and visits to the "Clinic". E.g. treatments such as guard, denture, etc. One-time treatments which can be completed within a session can be referred to as "Performed" status, for example treatments like: scaling and polishing, extraction, etc…

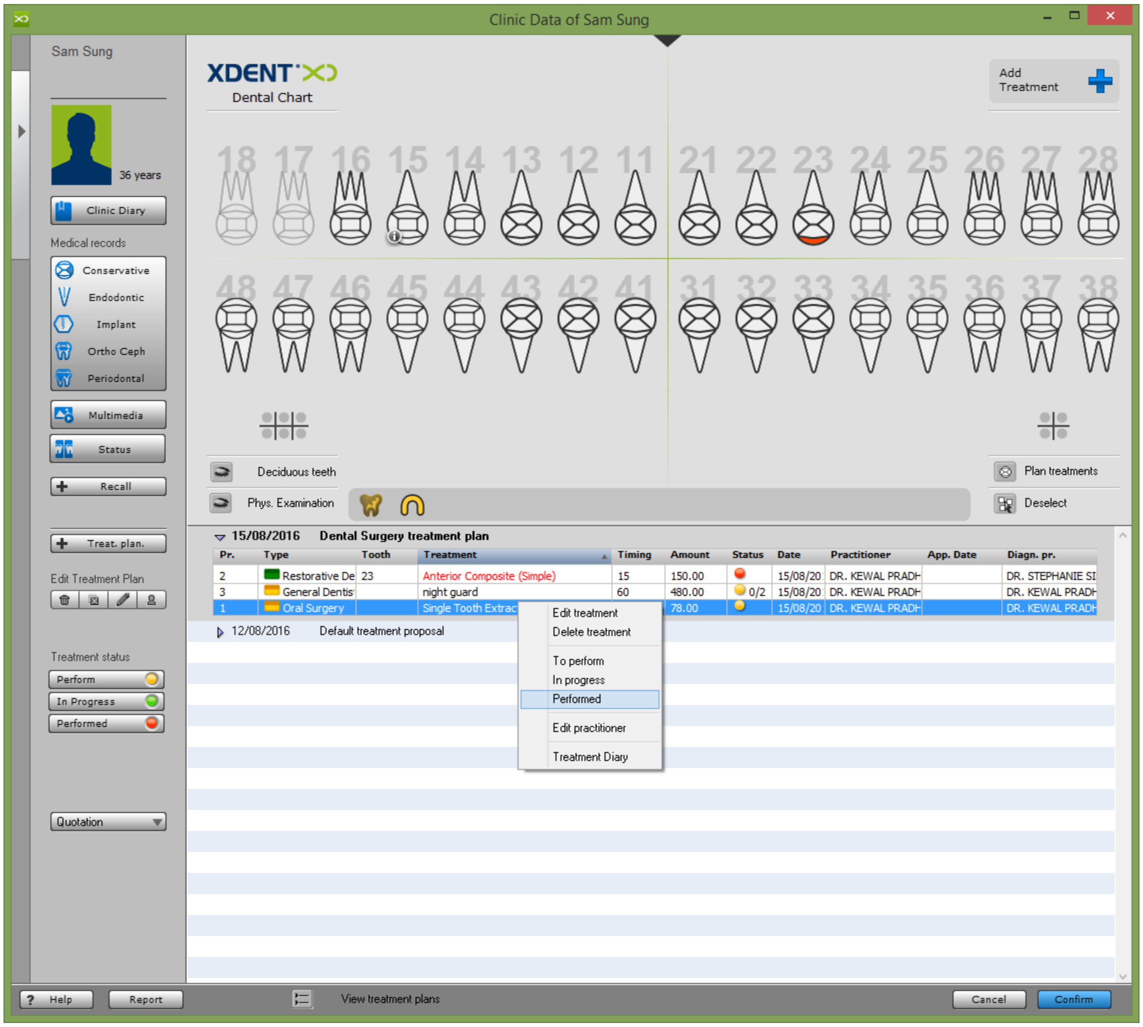
To change the Treatment colour status, (Refer #5.1)

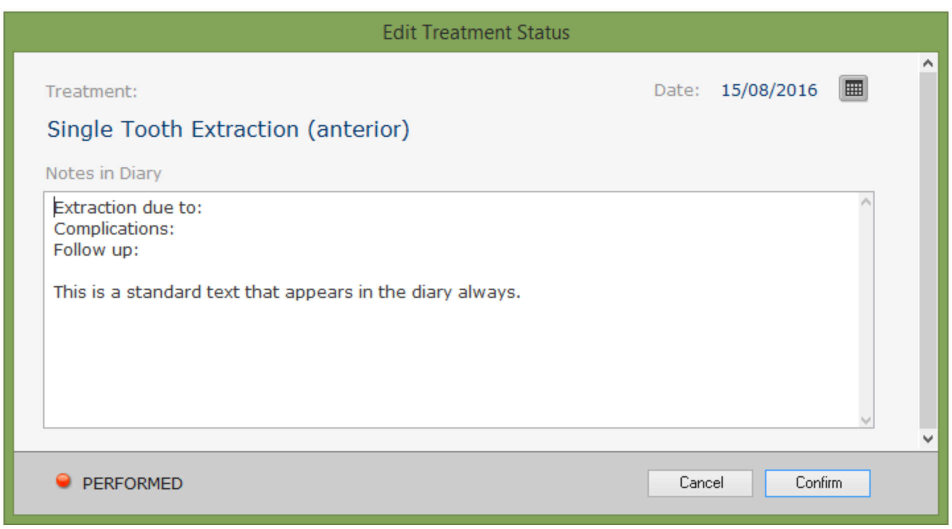
There are two ways to change treatment status:

1) Select the treatment and click treatment status on left "in progress" or "performed" and it will prompt you to enter clinical dairy notes

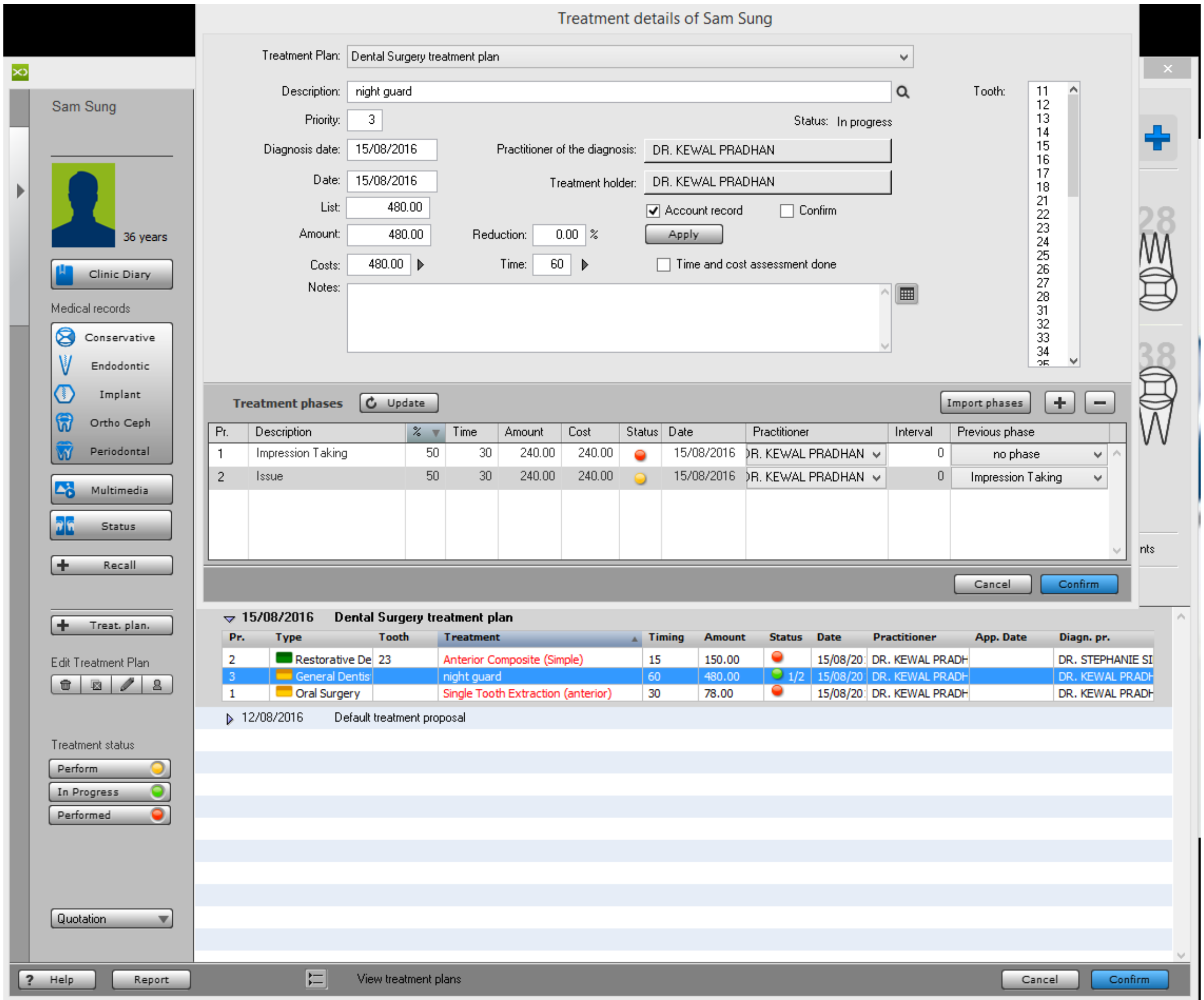


2) Right click on the treatment and select "in progress" or "performed" and it will prompt to enter clinical dairy notes



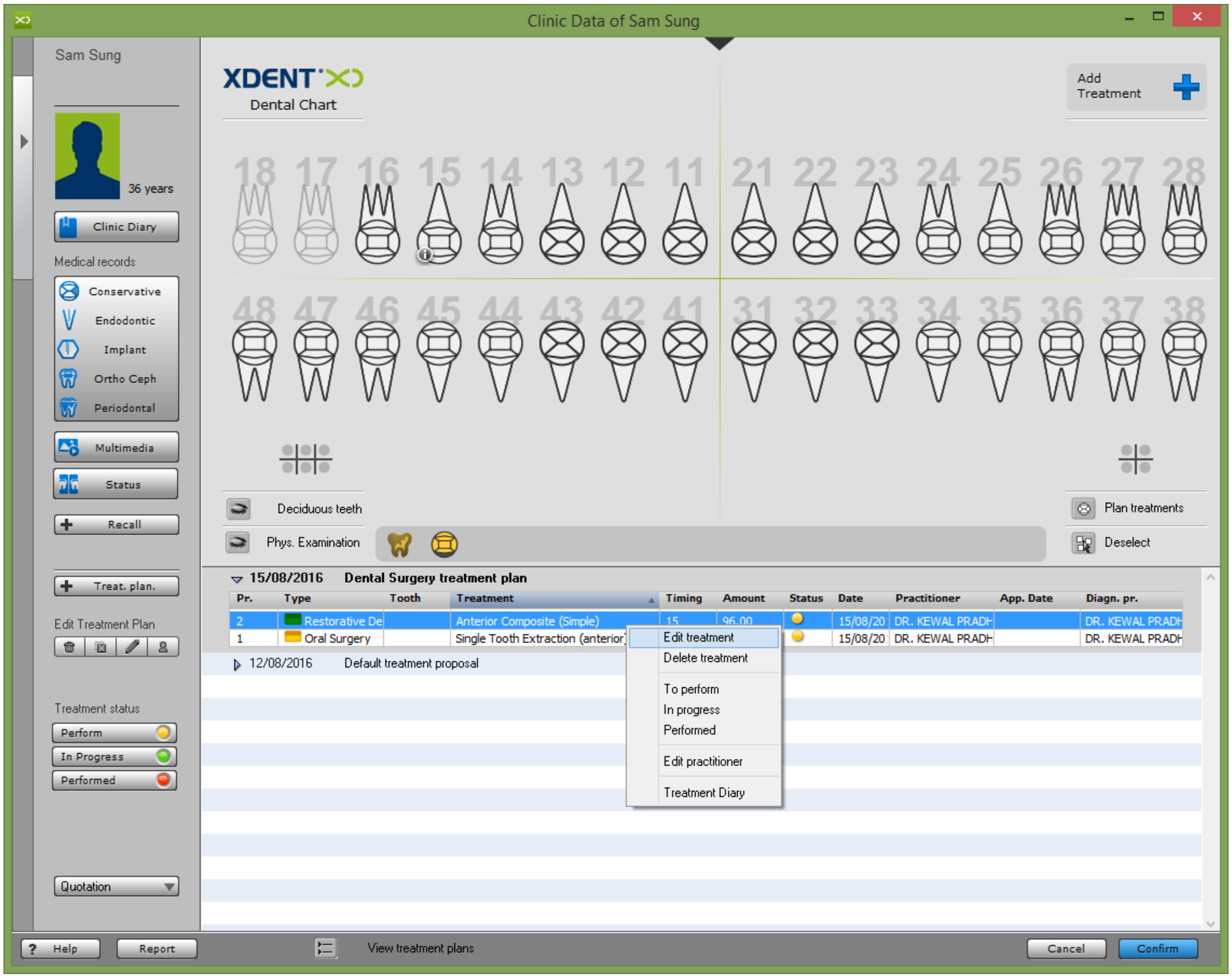


For those Treatment with Phases, the User is required to edit treatment and change the status of each phases one by one. If one of the phases is incomplete for that treatment, the whole treatment status will be "In Progress"

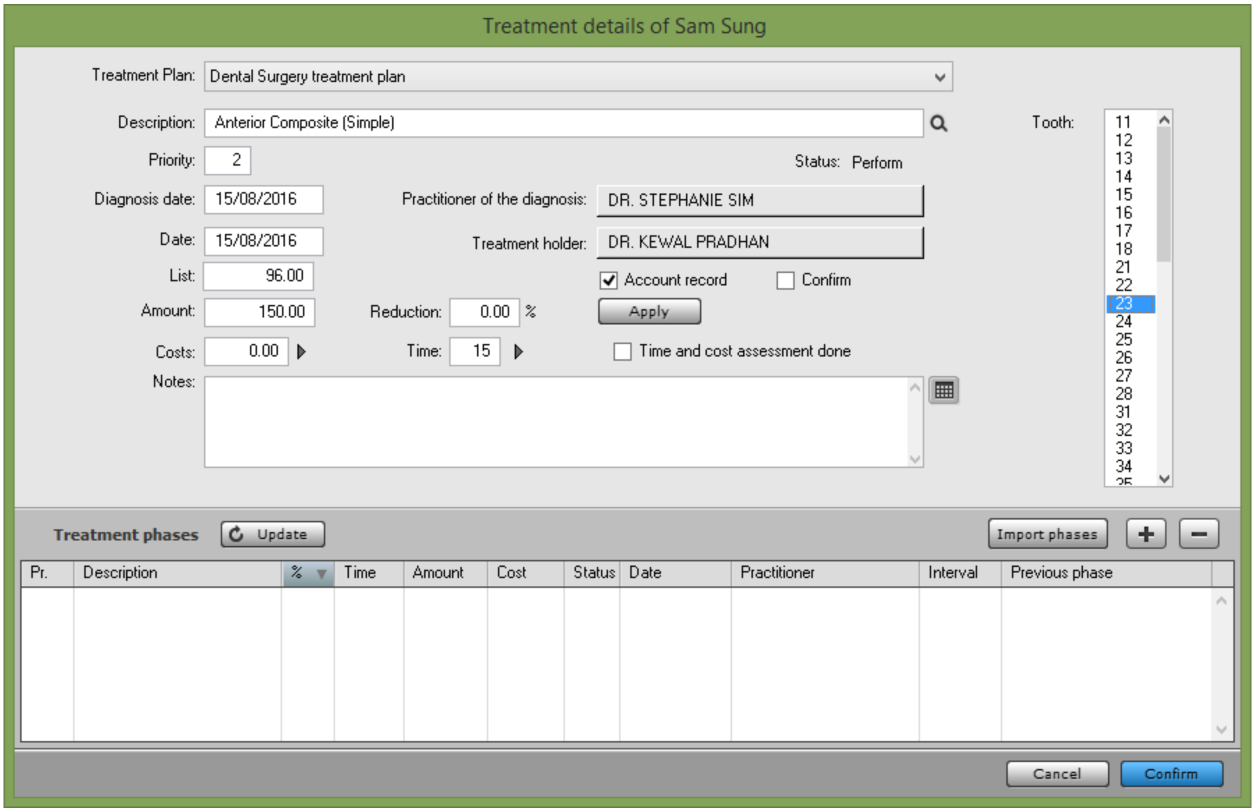


How to Edit Treatment to change Price in a Treatment plan?

There are two ways to edit a treatment in a treatment plan, either double click on treatment or Right click to edit the treatment.



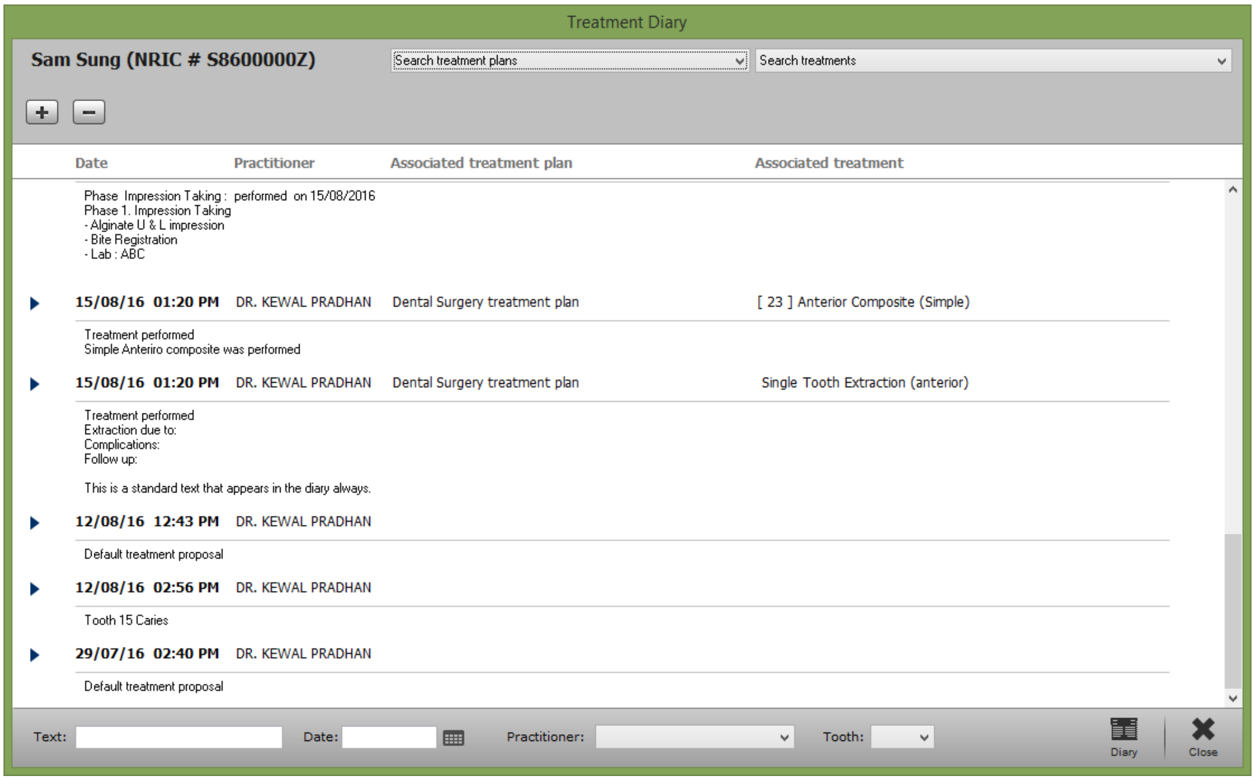
In Edit Treatment, you can change the Amount to be charged to the Patient, change Practitioner, or select Tooth that Treatment is applied to.



How to Edit Patient Clinical Notes in Treatment Dairy?

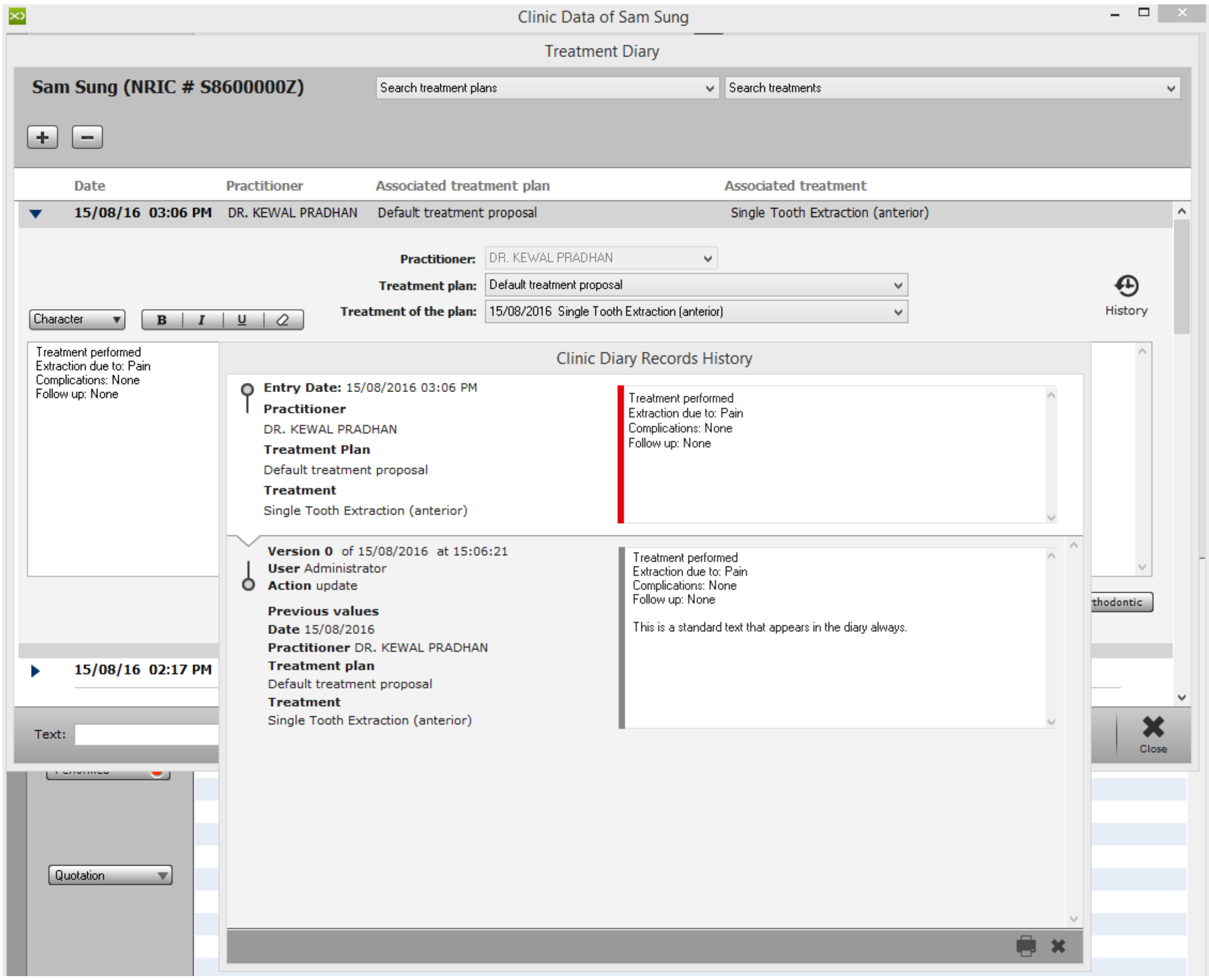
You can access the diary from the patient's Main Treatment Plan window or from appointment.

XDENT Treatment diary gathers all medical notes about patients which are defined in the various parts of the software or are explicitly entered by the practitioner in the Diary management window.



Date and timestamp is registered by the system as and when the Practitioner enters or edit the notes.

In Treatment Dairy, you are able to view the record history of when a note was changed.



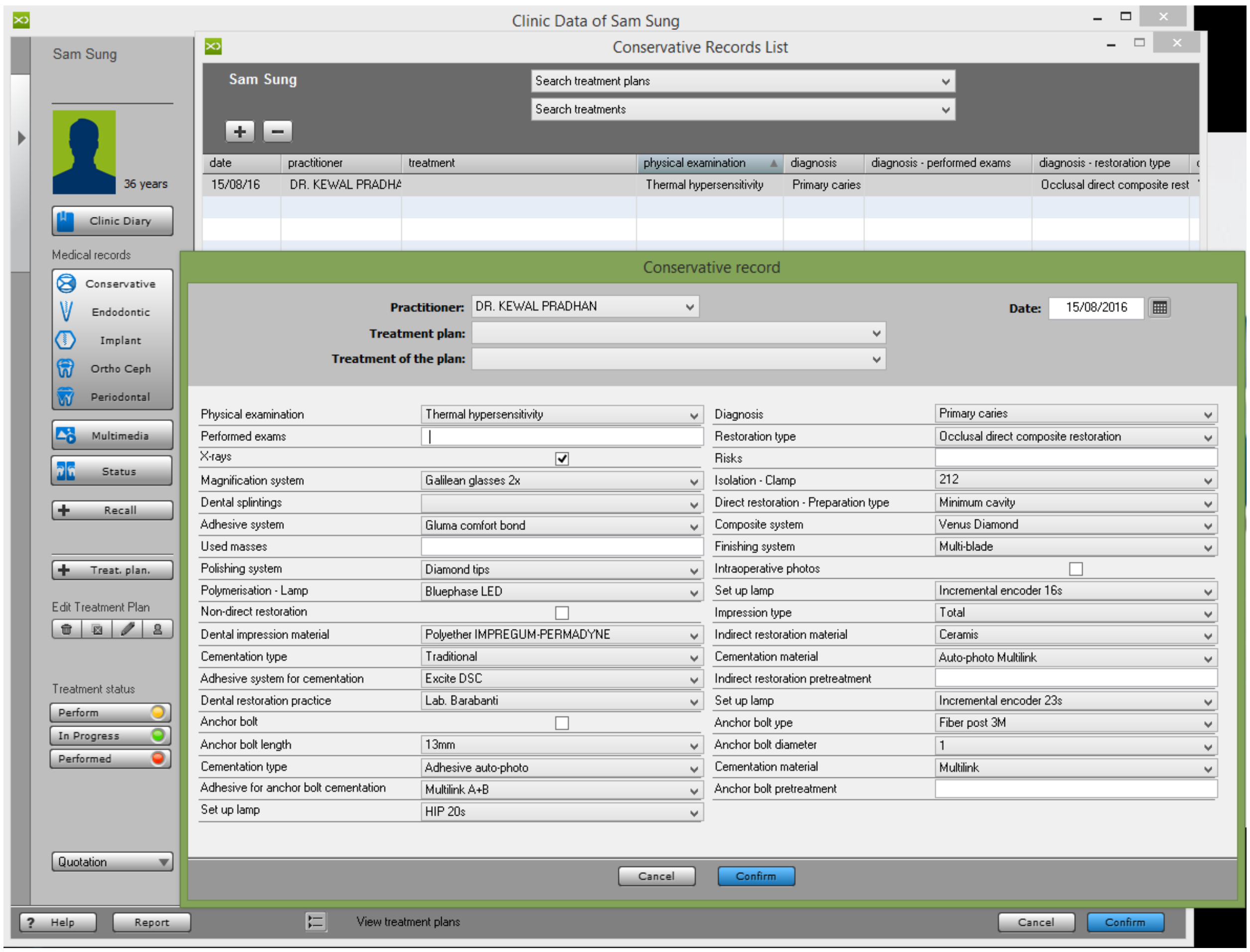
How to Add/Edit/Delete Medical Records in XDent?

The Practitioner can add or edit a medical record like Conservative, Endodontic, Implant, Ortho Ceph and Periodontal.

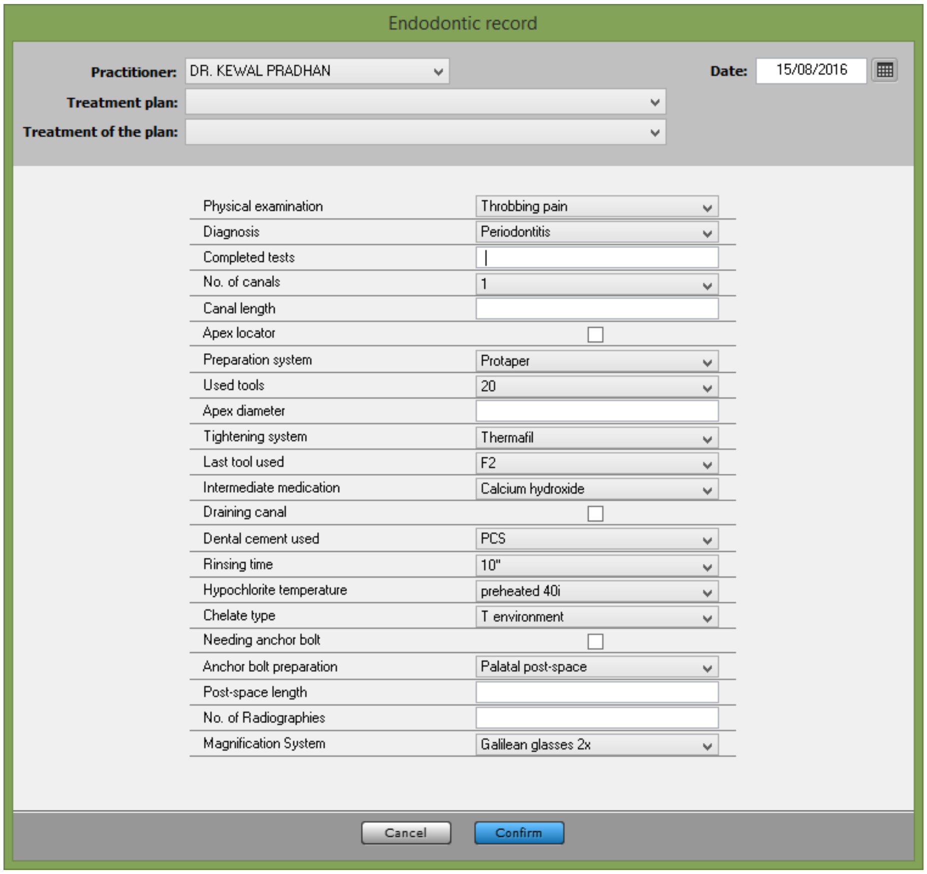
On left hand bar, under Medical Records, click the type to create a new Medical record and add click "+". To delete the record click "-"and double click the record to edit it.

To customise the Medical Records Values, (Refer #5.2)

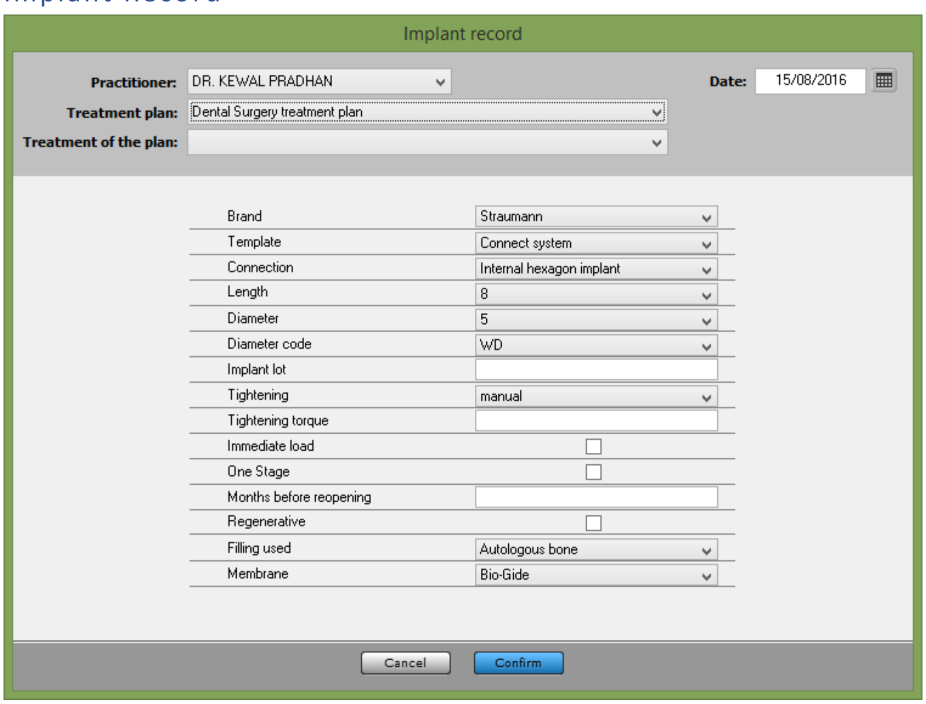
Conservative Record



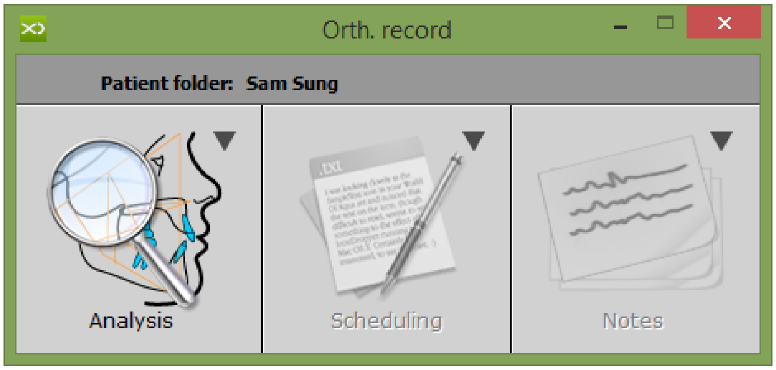
Endodontic Record

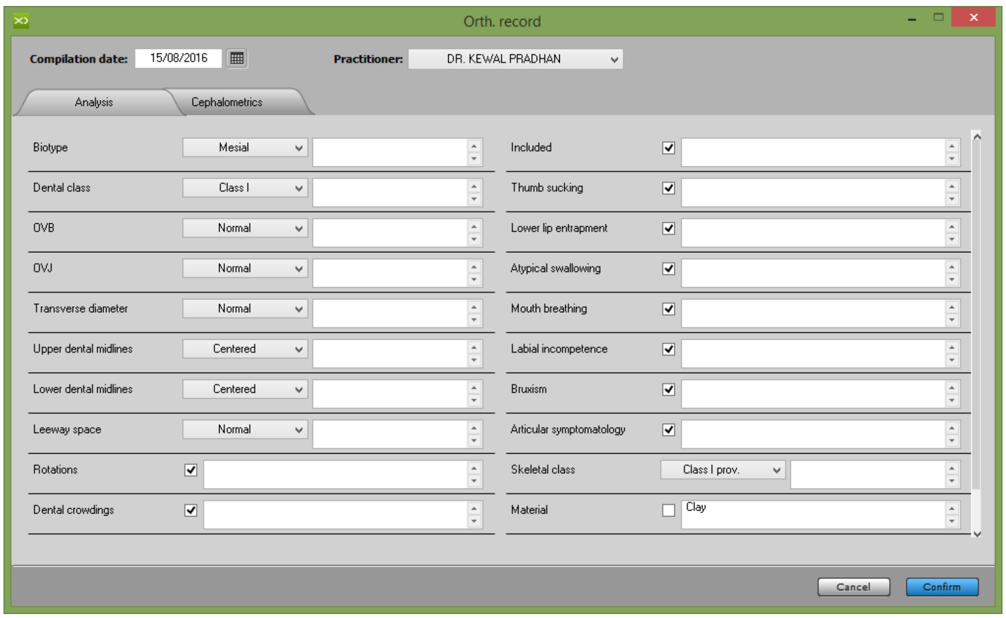


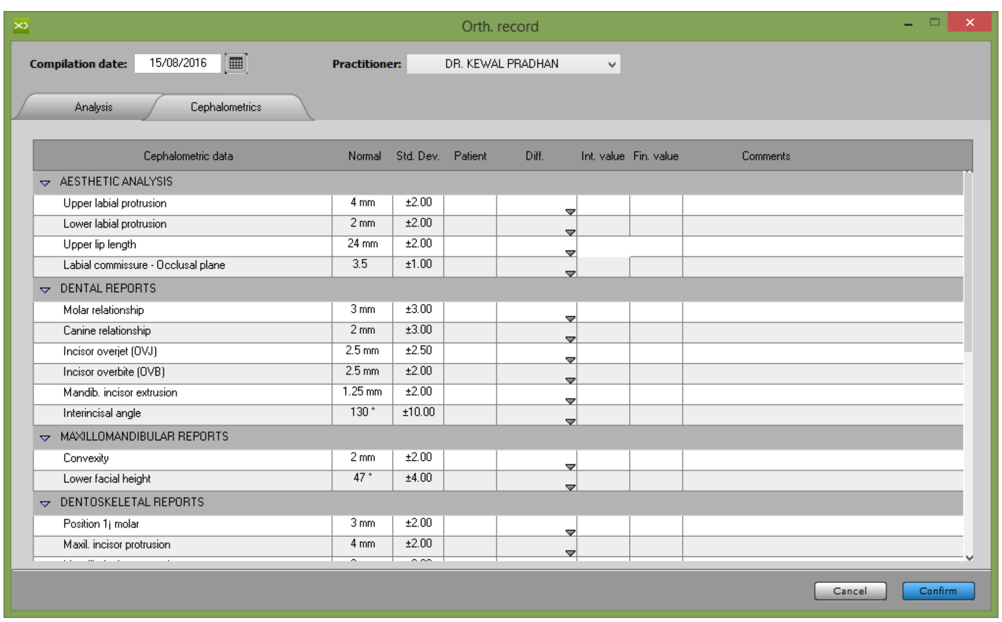
Implant Record



Ortho Ceph Record

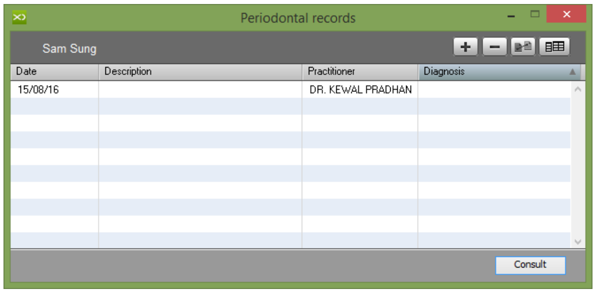


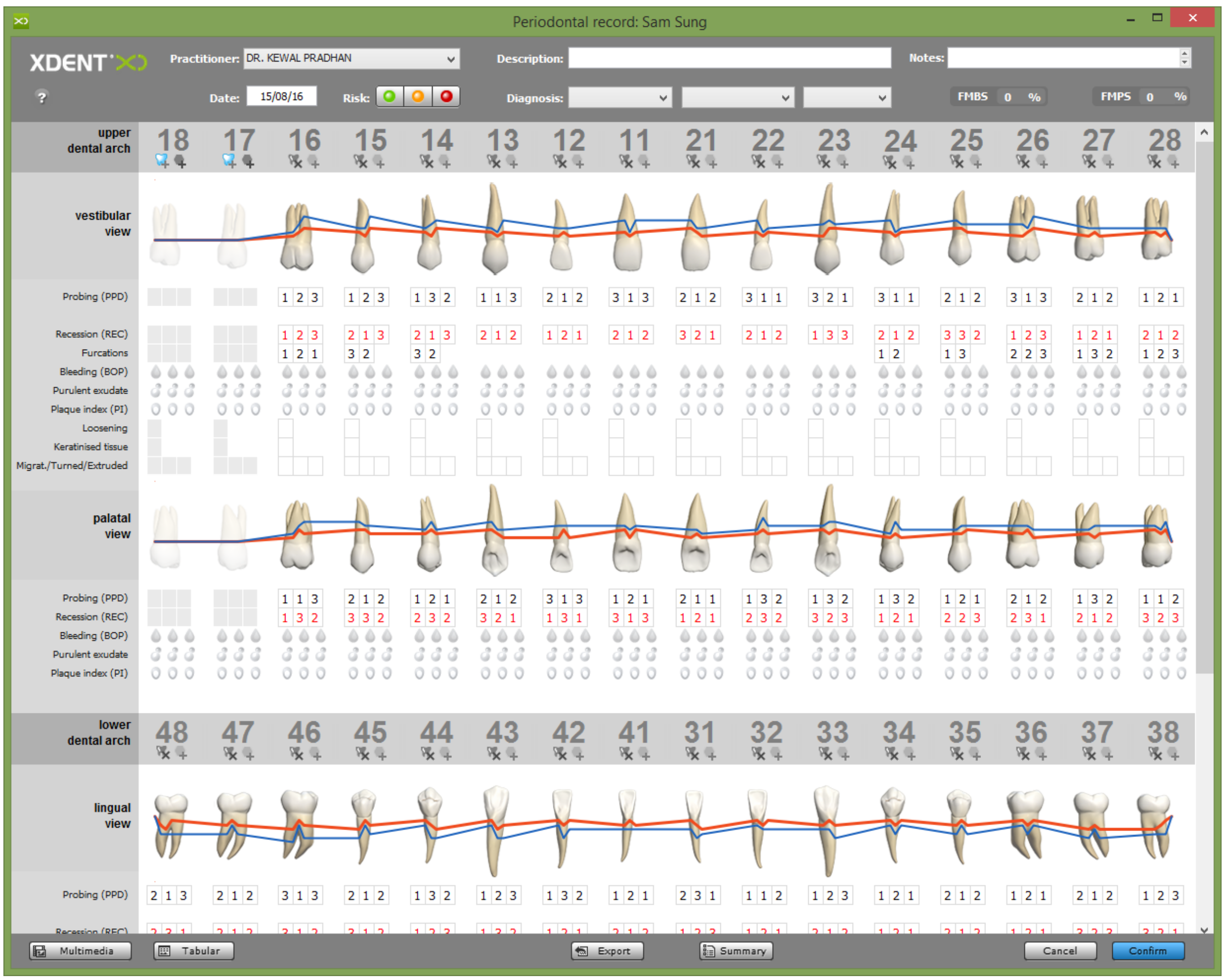




Periodontal Record

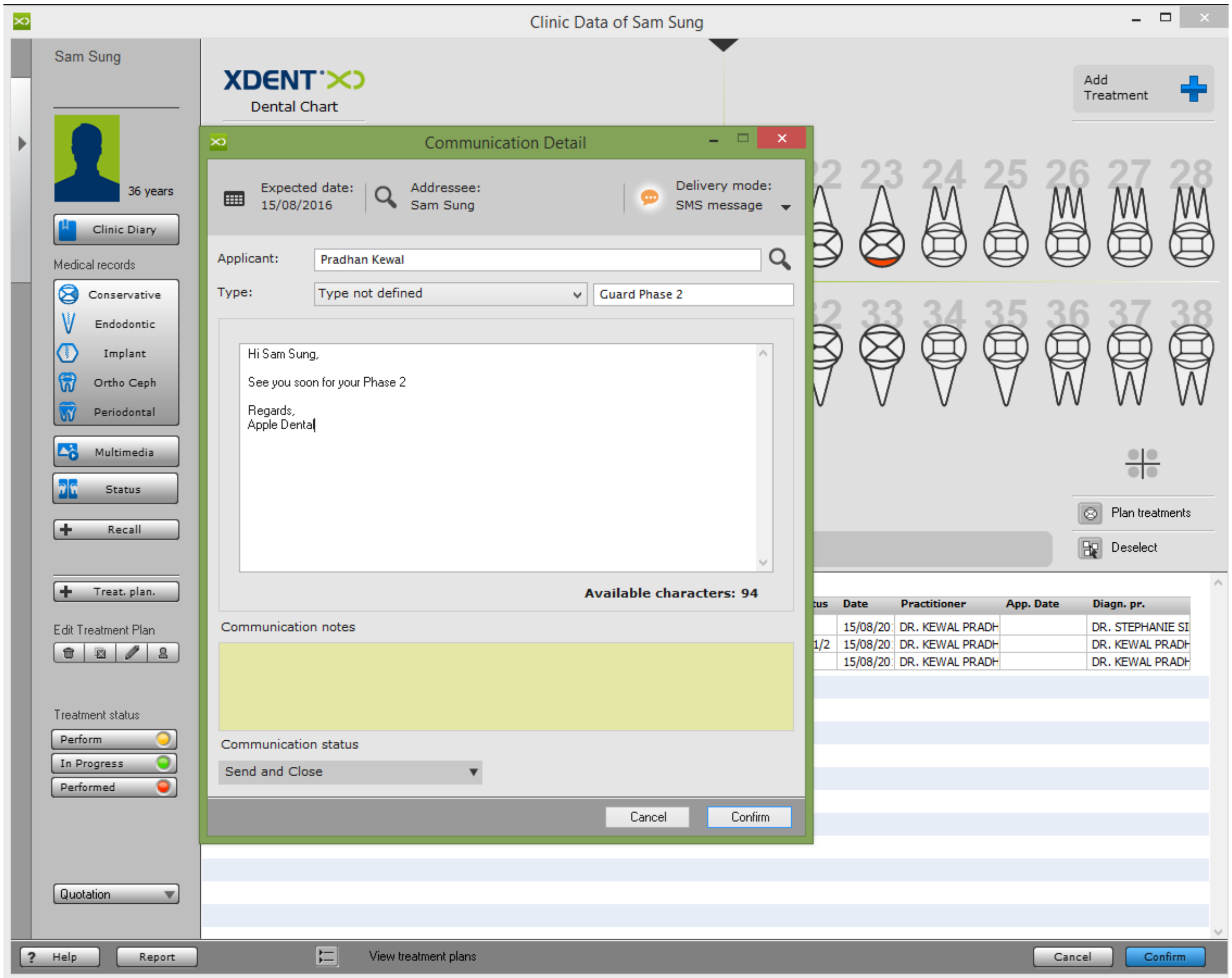
The Practitioner can make a comparison between 2 or more periodontal charts.





How to set Recall for Patient in XDent?

RECALL can be set from Clinic Data, either create a new recall or select from existing recall type, (Refer #13.3)



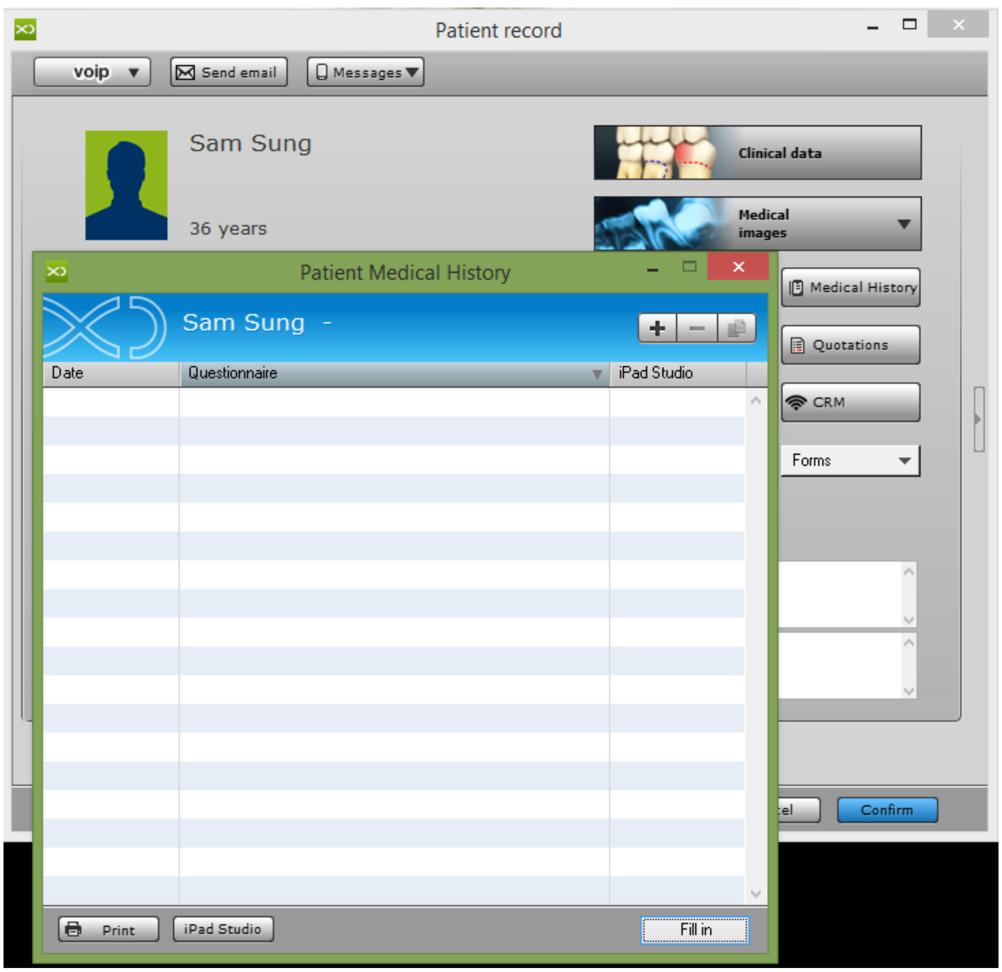
7.1.6. Medical History

How to add Medical History for a Patient in XDent?

MEDICAL HISTORY Questionnaire must be filled in by patients on their first visit and can be done in two ways:

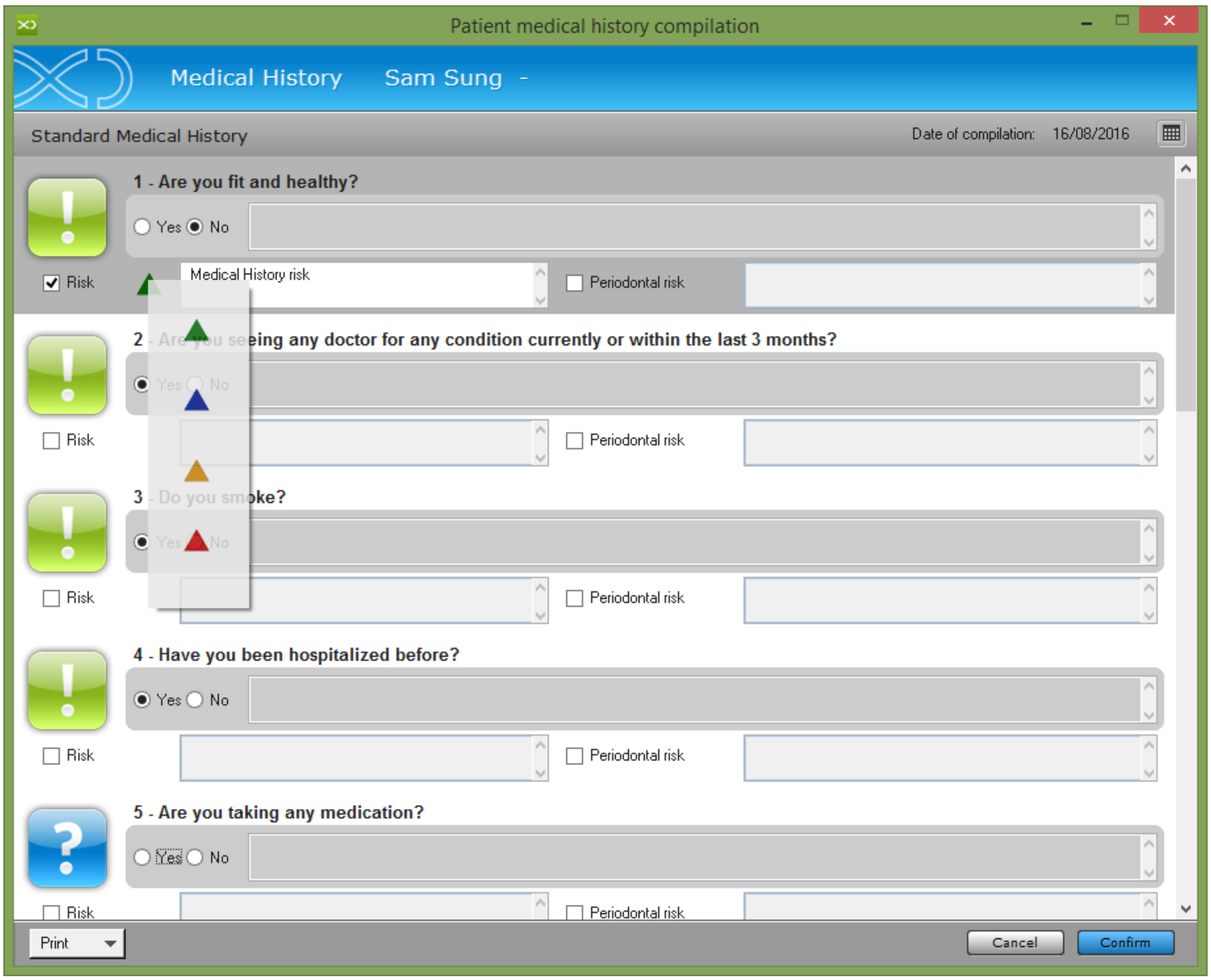
1. by using the corresponding section from patient record and so compiled by the practice assistant or
2. by using XDENT iPad Studio which allows patients to fill out the questionnaire by themselves: this option is extremely functional because the administrative staff gives the patient the iPad with a temporary code to fill out his/her medical history and/or personal data.

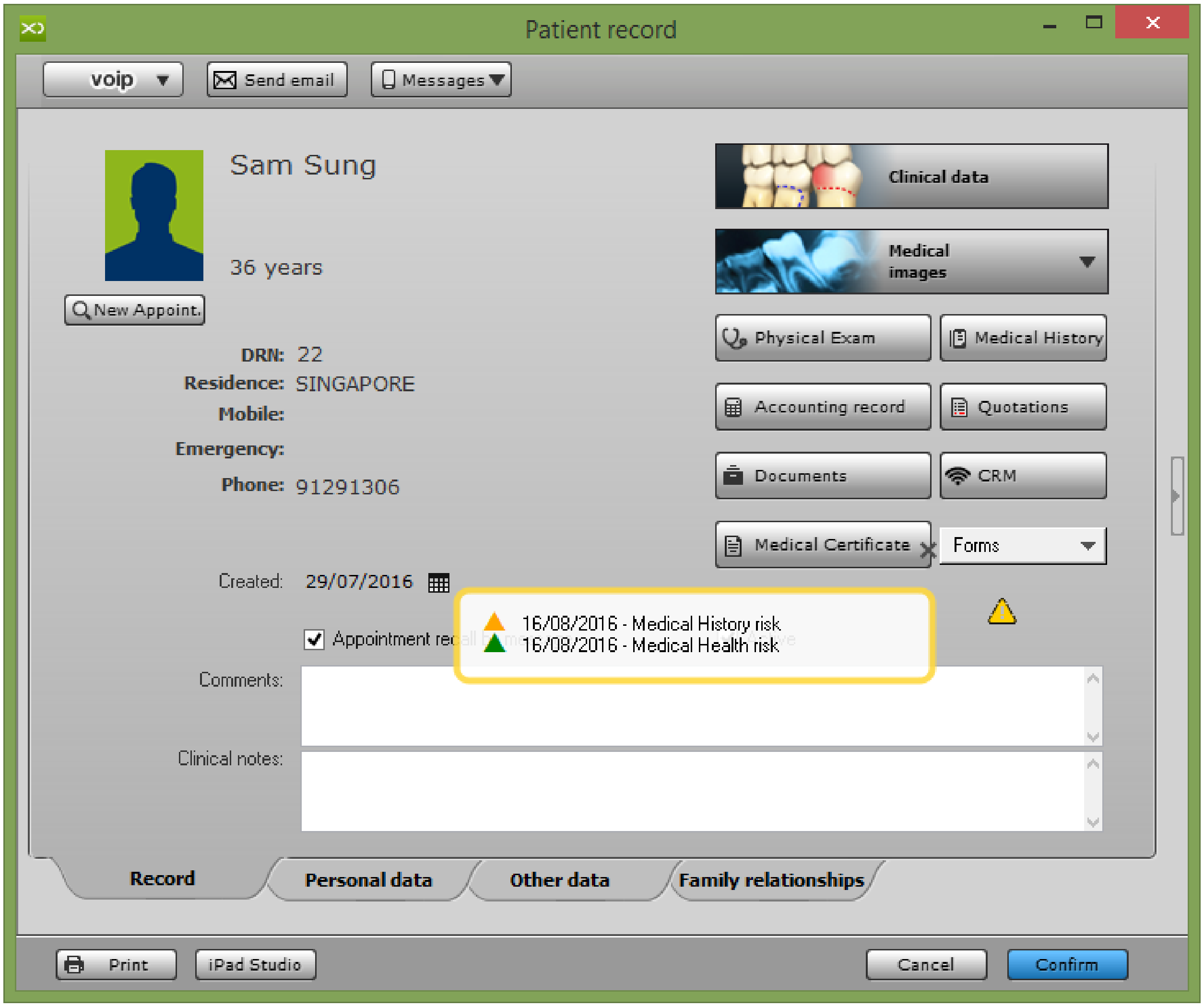
For Medical Questionnaires setup, (Refer #13.4)



How to add Medical History Risk for a Patient in XDent?

Medical History RISK can be added from Patient Record > Medical History, with some risk factors being associated with a patient's medical history, XDent provides you with some alerts that display the risk type, its degree, etc.
The Practitioner can associate the risk to an icon and set a colour to represent its corresponding severity grade. There are two types of alerts, indicating respectively a general medical risk and a periodontal risk. When preparing the questionnaire, first select the "risk" check to associate the anamnesis risk to the selected icon, then choose its colour by clicking on the icon.



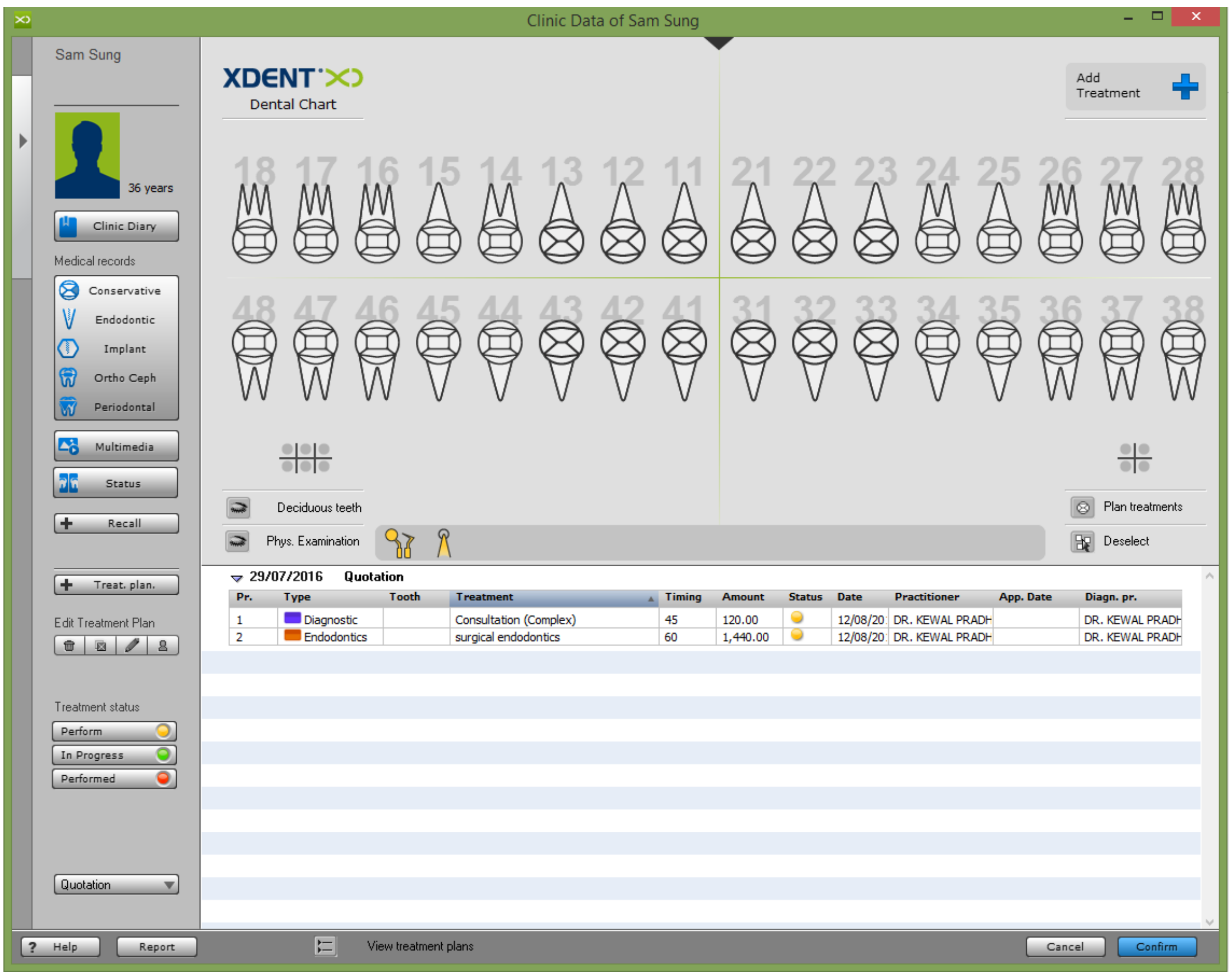

Patient record
voip
Send email
Messages
Sam Sung
36 years
New Appoint.
DRN: 22
Residence: SINGAPORE
Mobile:
Emergency:
Phone: 91291306
Created: 29/07/2016
Appointment re
Comments:
Clinical notes:
16/08/2016 - Medical History risk
16/08/2016 - Medical Health risk
Clinical data
Medical images
Physical Exam
Medical History
Accounting record
Quotations
Documents
CRM
Medical Certificate
Forms
Record
Personal data
Other data
Family relationships
Print
iPad Studio
Cancel
Confirm

7.1.7. Quotation

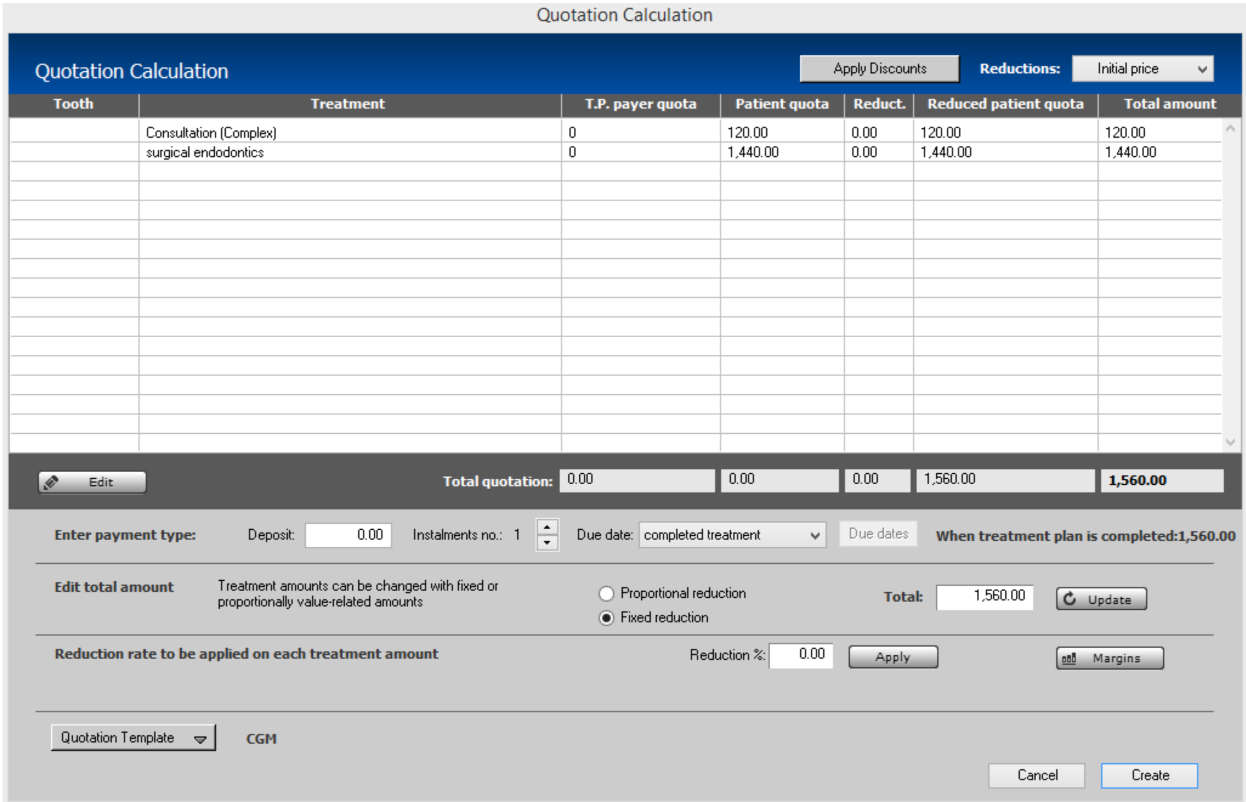
How to issue a Quotation for a Treatment Estimation to Patients in XDent?

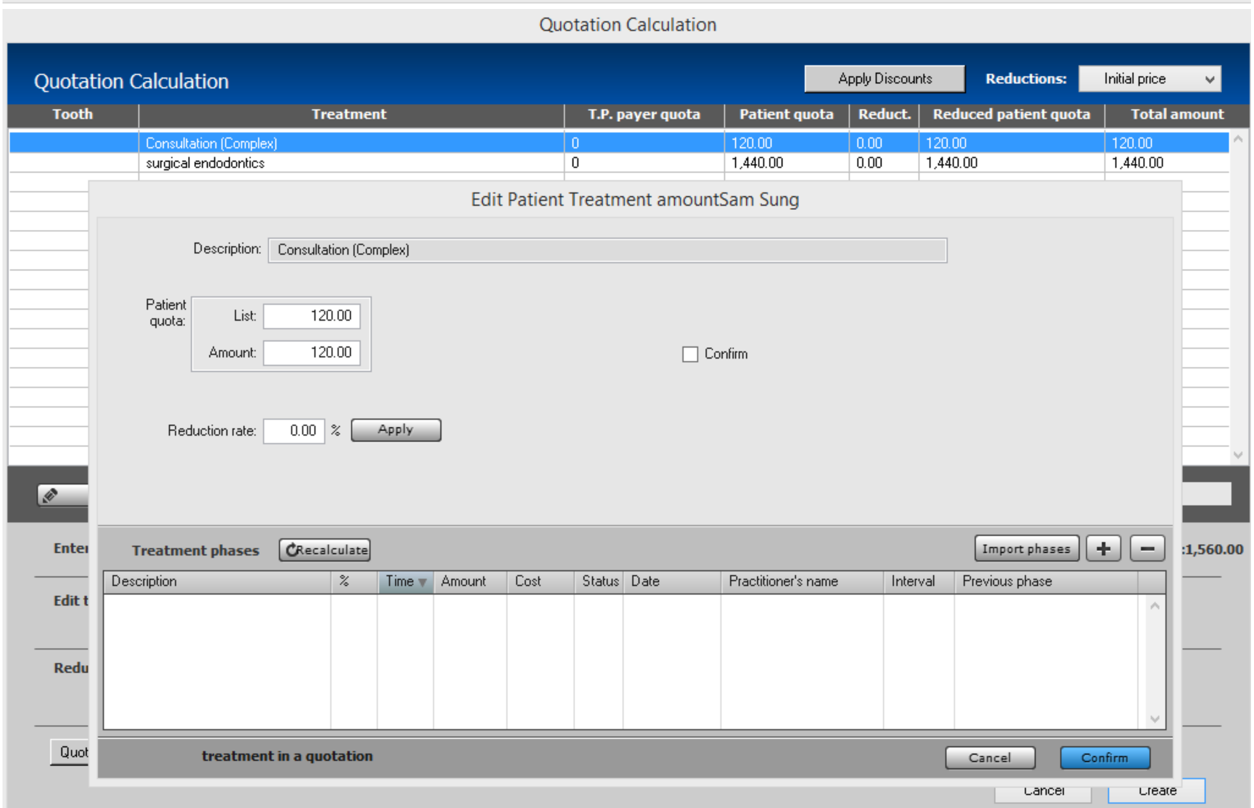
The QUOTATION contains all the patient's estimates, and from here the Practitioner can generate a cost estimate for the patient with the agreed upon payment terms, change the state of each of them and eventually eliminate them or duplicate them to adduce changes.

The Practitioner must create a NEW Treatment plan and ADD treatment then click Quotation Button on left bottom

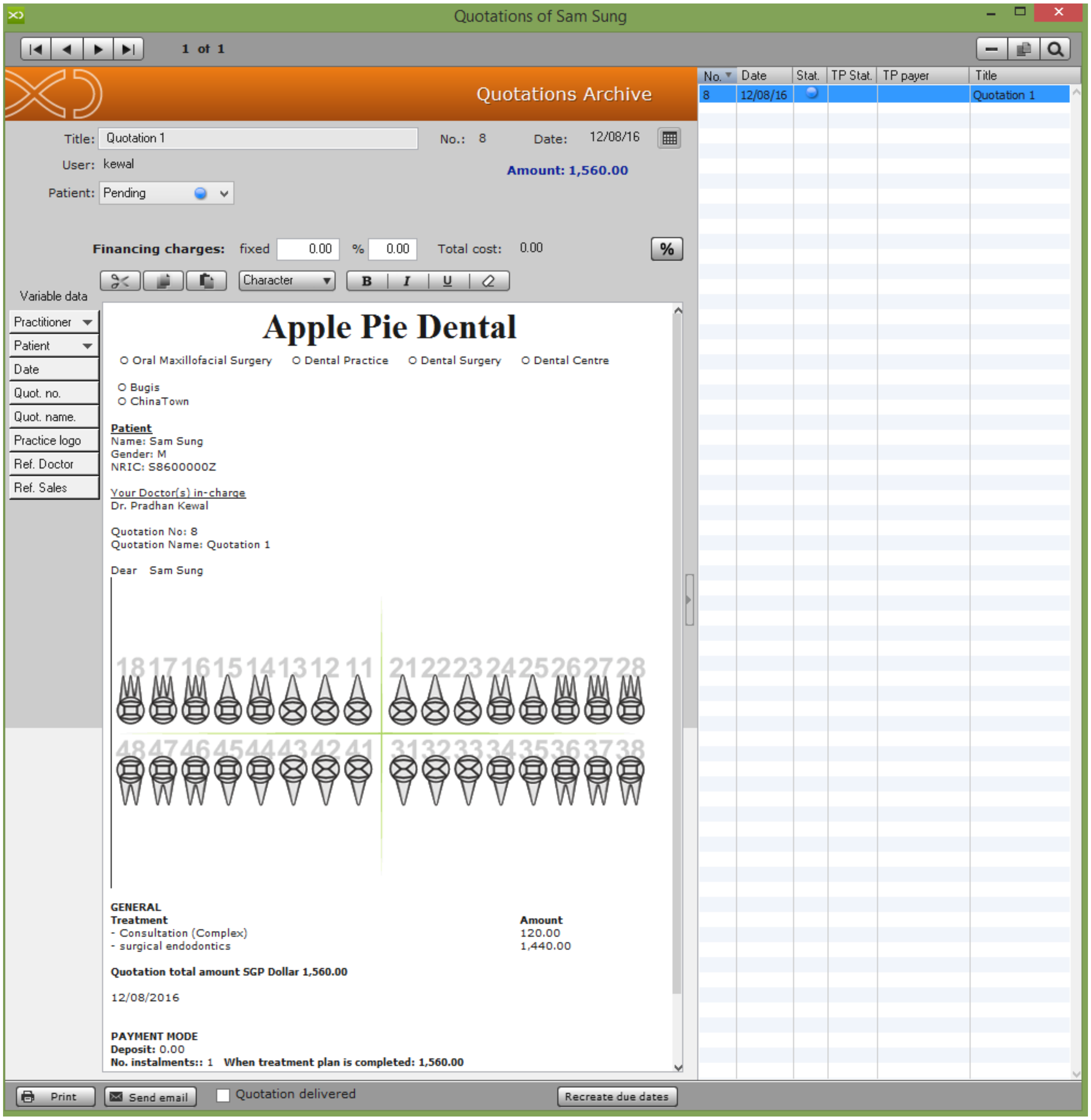


Select the Quotation template and Edit the Treatment (Amount, Discount)



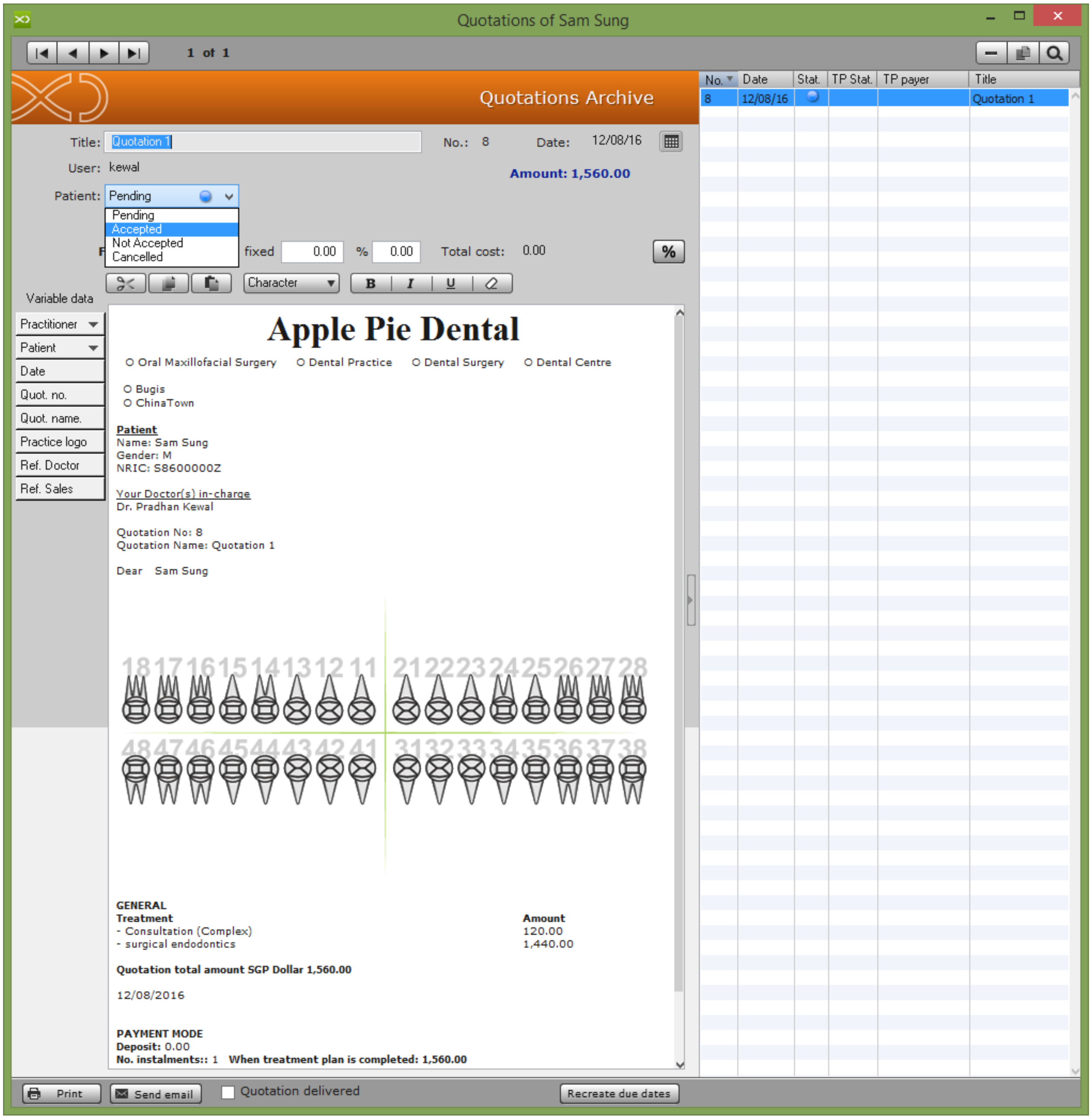


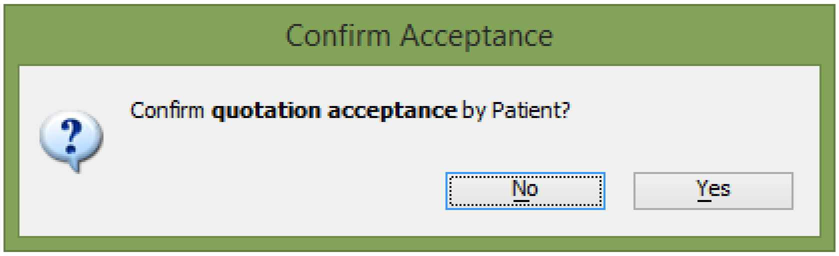
Based on the Quotation Template, a Quotation will be generated.

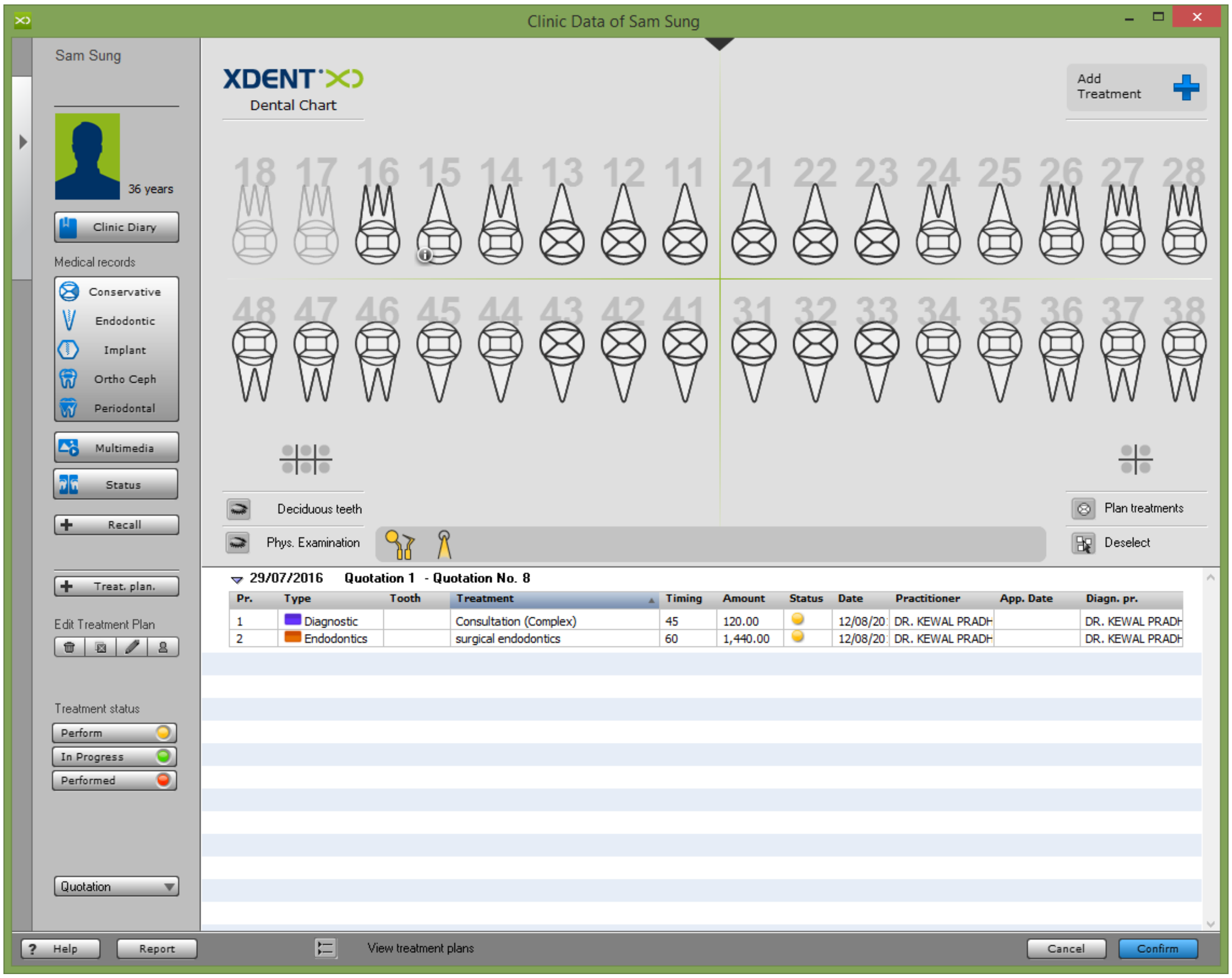


How to convert Accepted Quotation to a Treatment Plan in XDent?

In Quotation Document, change the Status of Quotation to "accept" and it will add in the Clinic Data of that Patient.







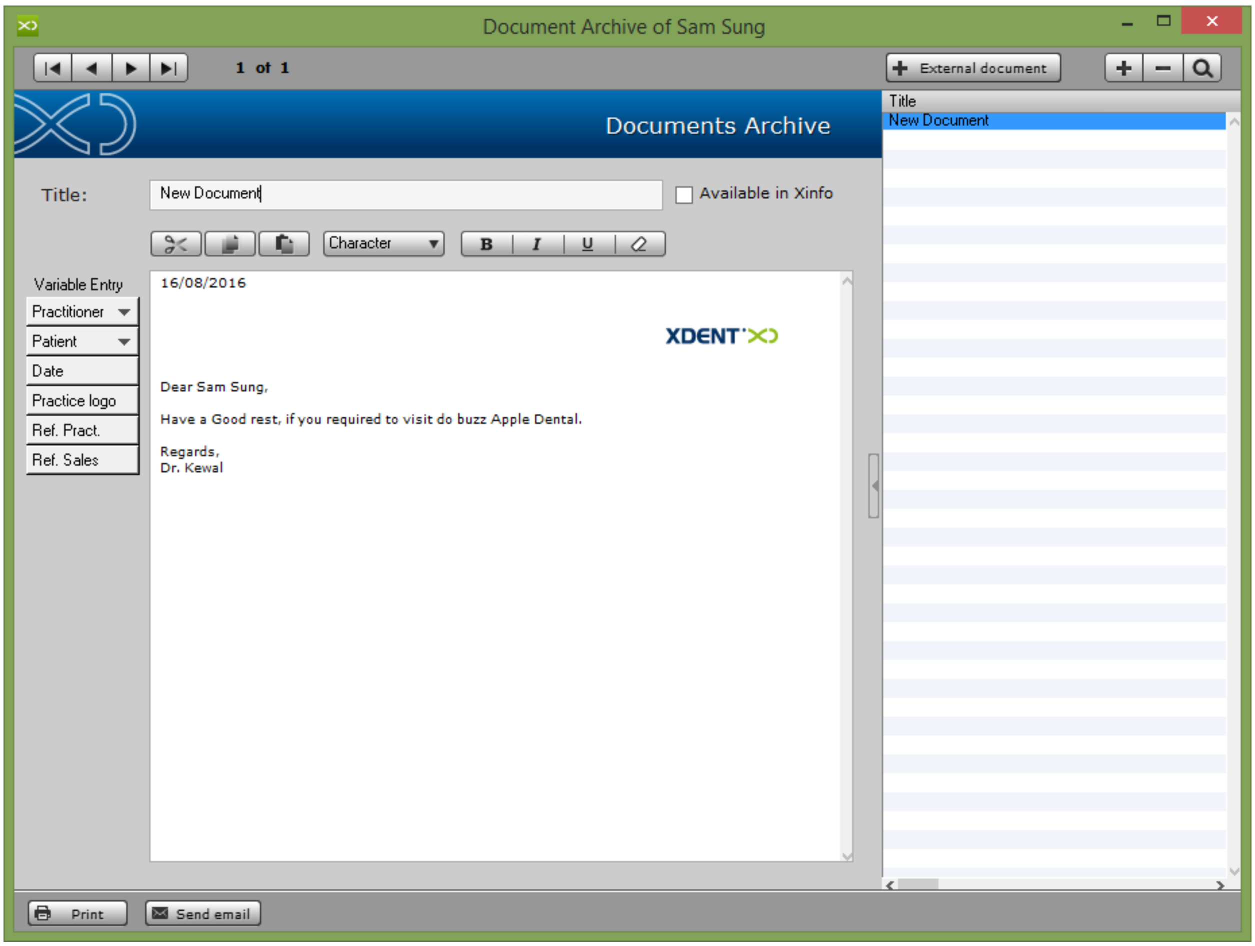
Note: The unaccepted quote is temporarily removed from the Treatment Plan. At the time of acceptance of the quotation, the performance will be automatically reflected in the care plan, ready to be executed.

7.1.8. Documents

How to Add/Edit/Delete/View Patient Document in XDent?

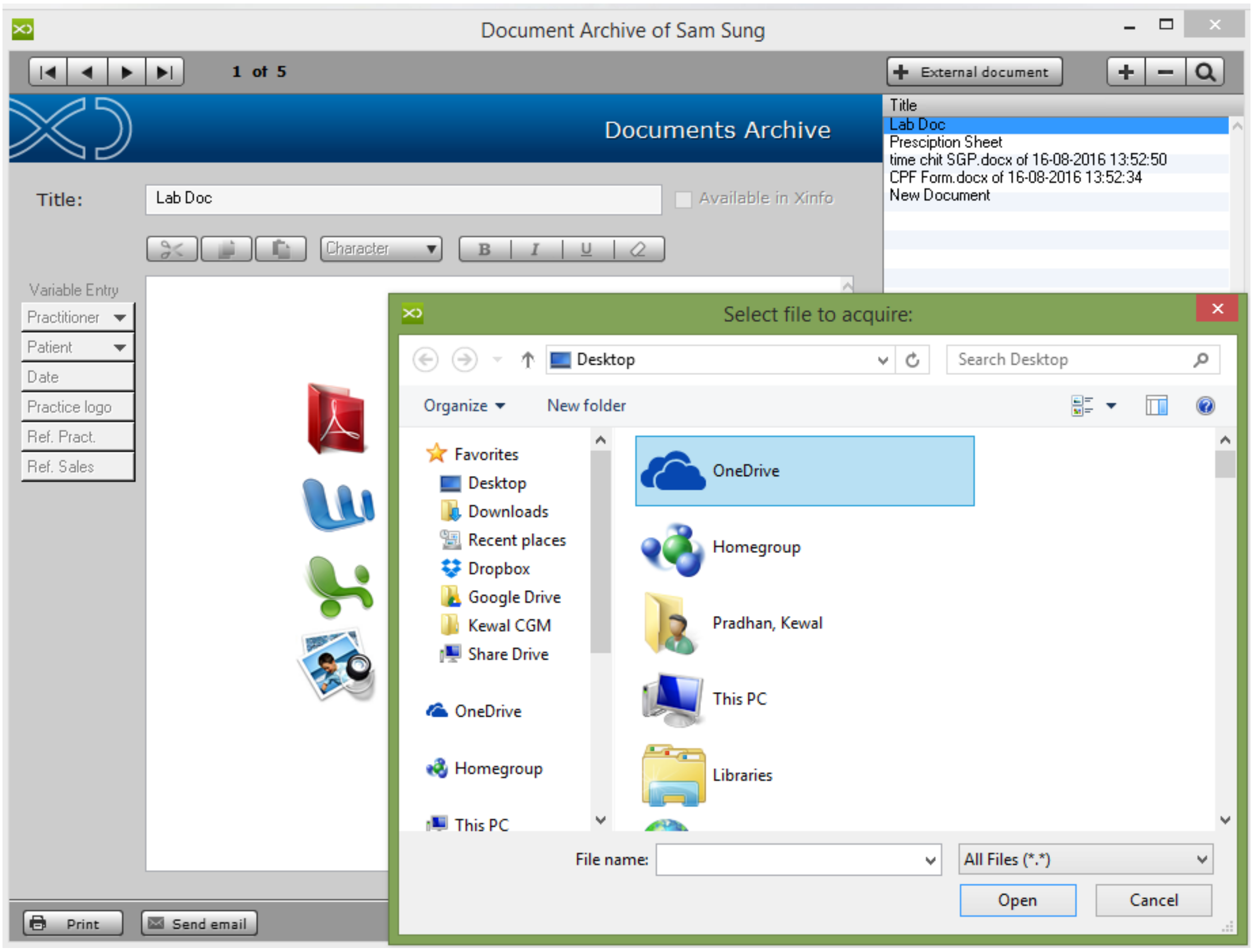
Patient Record > Documents

Patient DOCUMENT can be created directly from Document Archive, variable entry (document placeholder library) is available to pick field values to auto populate in the document of that Patient.



How to Attach Patient External Document in Patient Record?

To attach Patient external document in Patient record, click External document button and select patient external document from that workstation, there is no restriction on the type of document to be attached.
Example – Lab Document, Patient record from other clinic, Emails, etc.

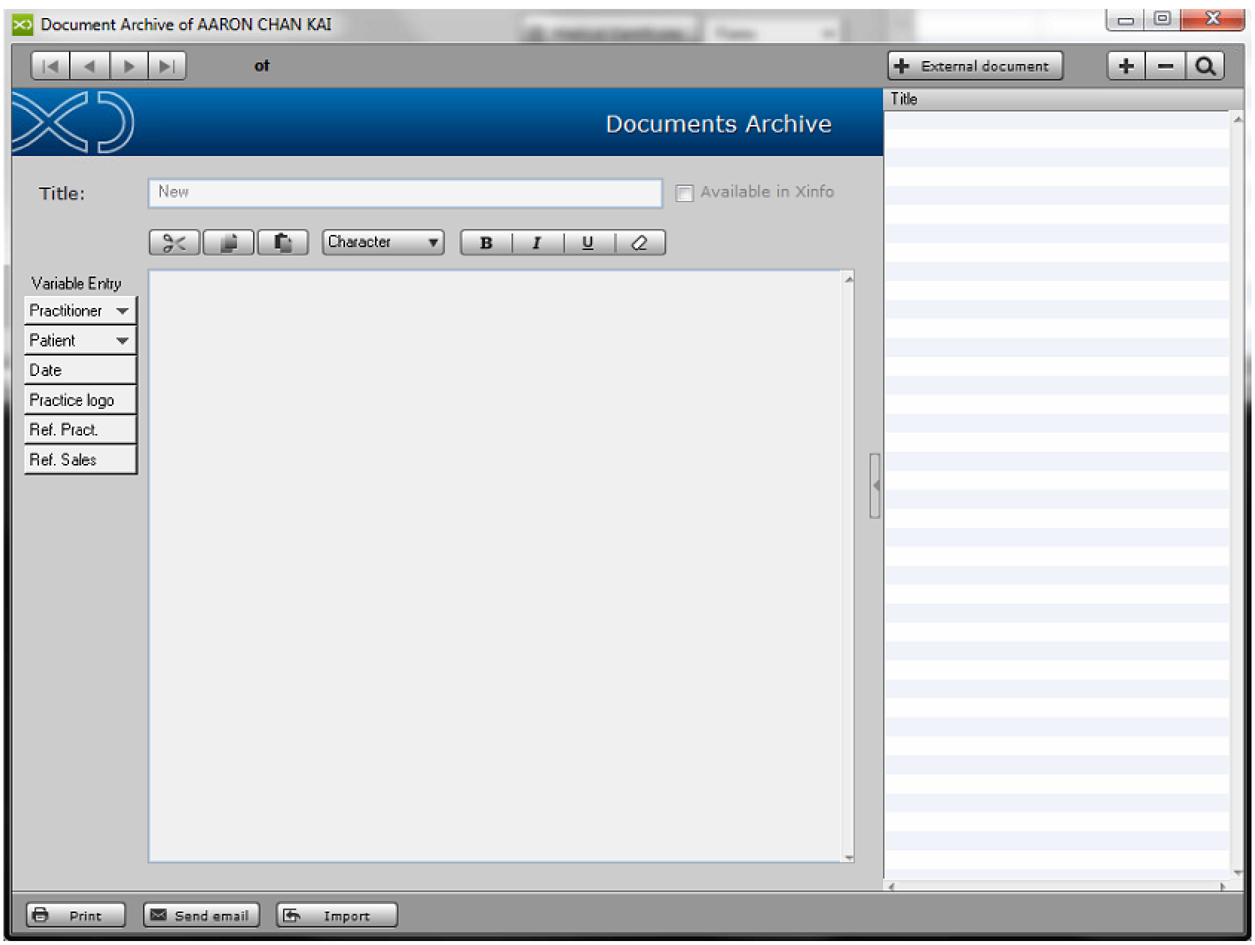


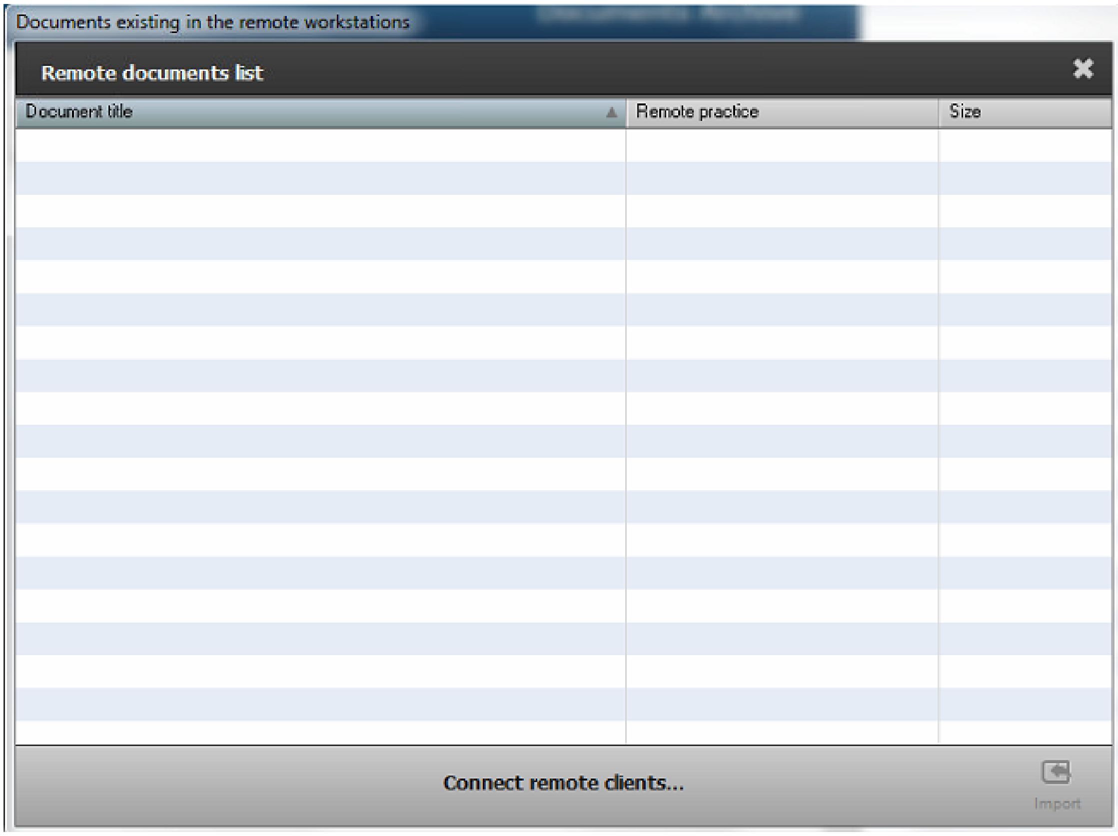
How to import Patient Document from other Clinic Location in XDent?

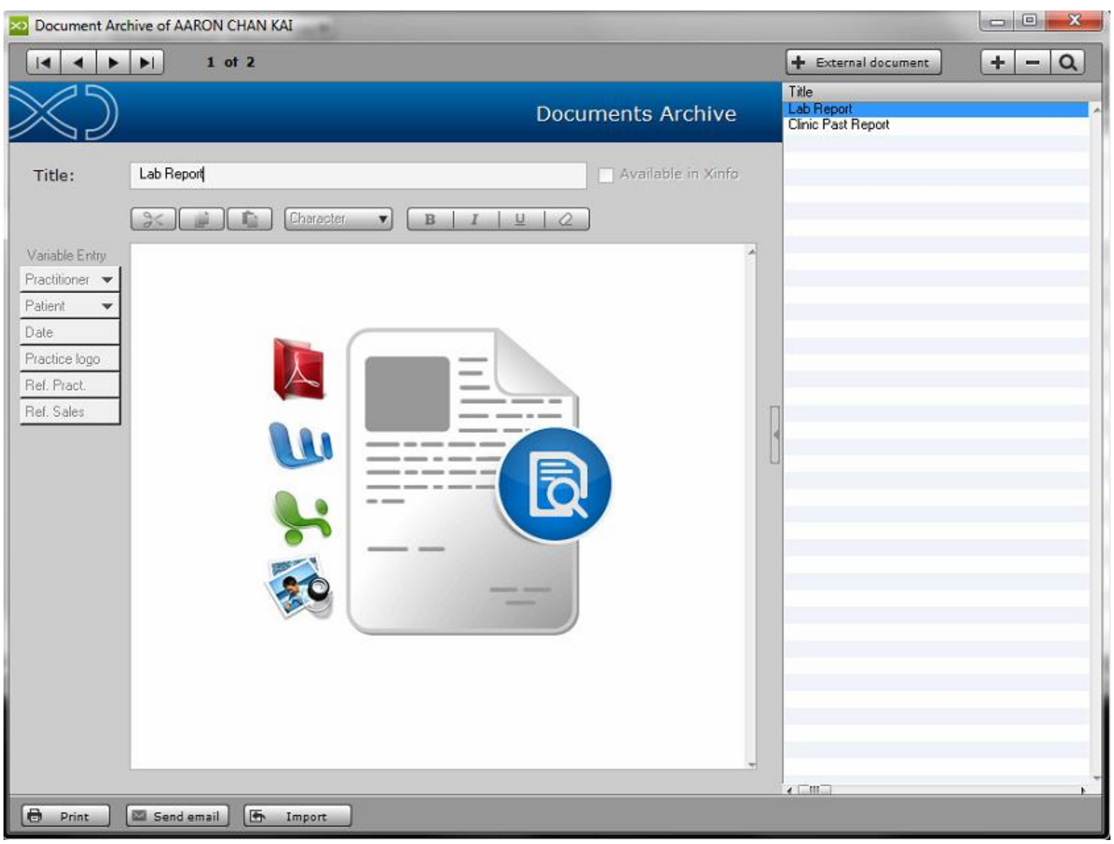
Patient's Document Transmission Module from a Clinic to Another Clinic in the same Pool and it apply to those clinic with more than one Location and have XSync Feature.

Document archive is managed in local server due to the fact that the external document or other types of file that is store in document archive (such as images, PDF, etc.) can be too "heavy" to transfer in the cloud but now If clinic upload Document from location it will Sync and will be available in Other Location.

Click Import button in Patient Document Archive and it will remote connect to other location system and retrieve Patient documents.




Documents existing in the remote workstations
Remote documents list
Document title
Remote practice
Size
Connect remote clients...
Import


Document Archive of AARON CHAN KAI
1 of 2
External document
Documents Archive
Title:
Lab Report
Available in Xinfo
Character
Variable Entry
Practitioner
Patient
Date
Practice logo
Ref. Pract.
Ref. Sales
Title
Lab Report
Clinic Past Report
Print
Send email
Import

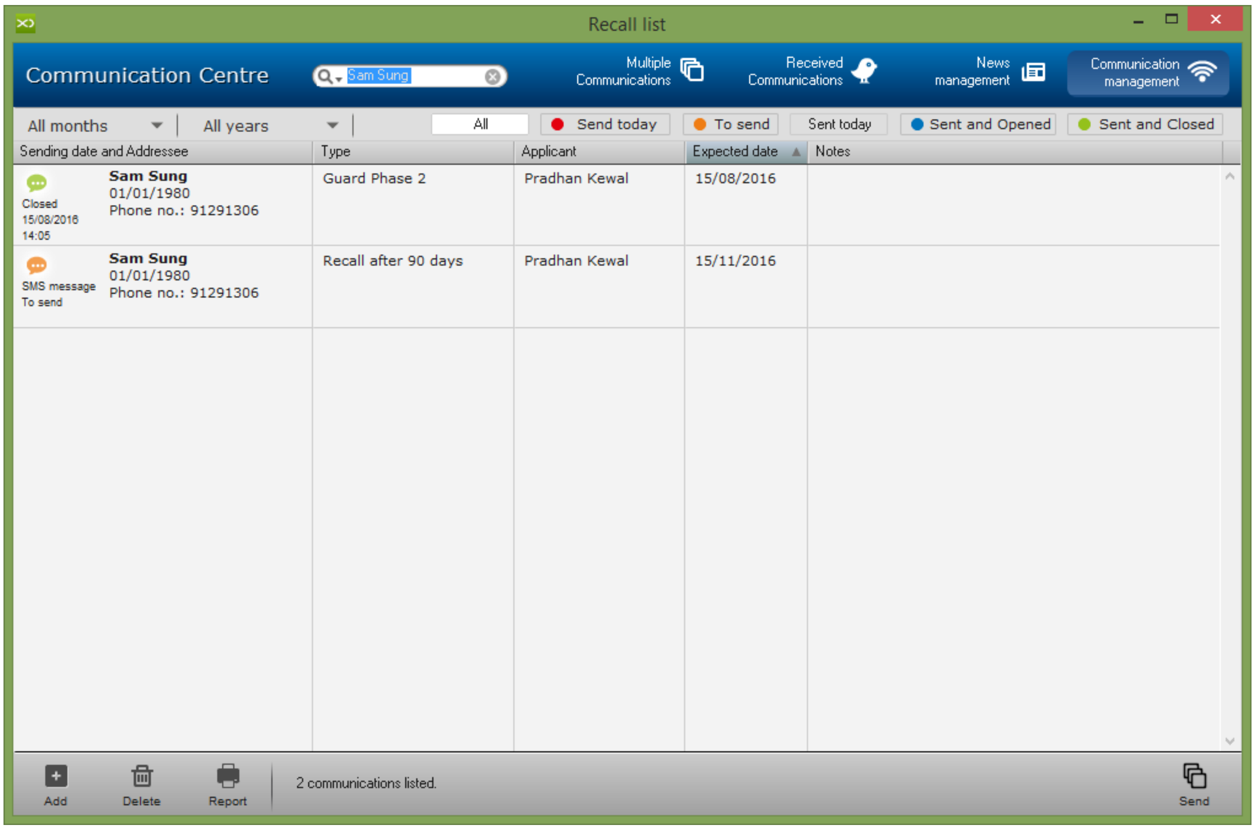
7.1.9. CRM

How to View Patient Communication from Patient Record?

Patient Record > CRM

CRM is a communication Centre 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)



7.1.10. Accounting Data

The ACCOUNTING DATA represents the main tool to obtain patient-related information in terms of profits and treatments provided at the practice.
Similarly to the main treatment plan, the list of treatments can be found. This is sorted by treatment plans in which accounting information relating to each treatment in the treatment plan is displayed. 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.
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.

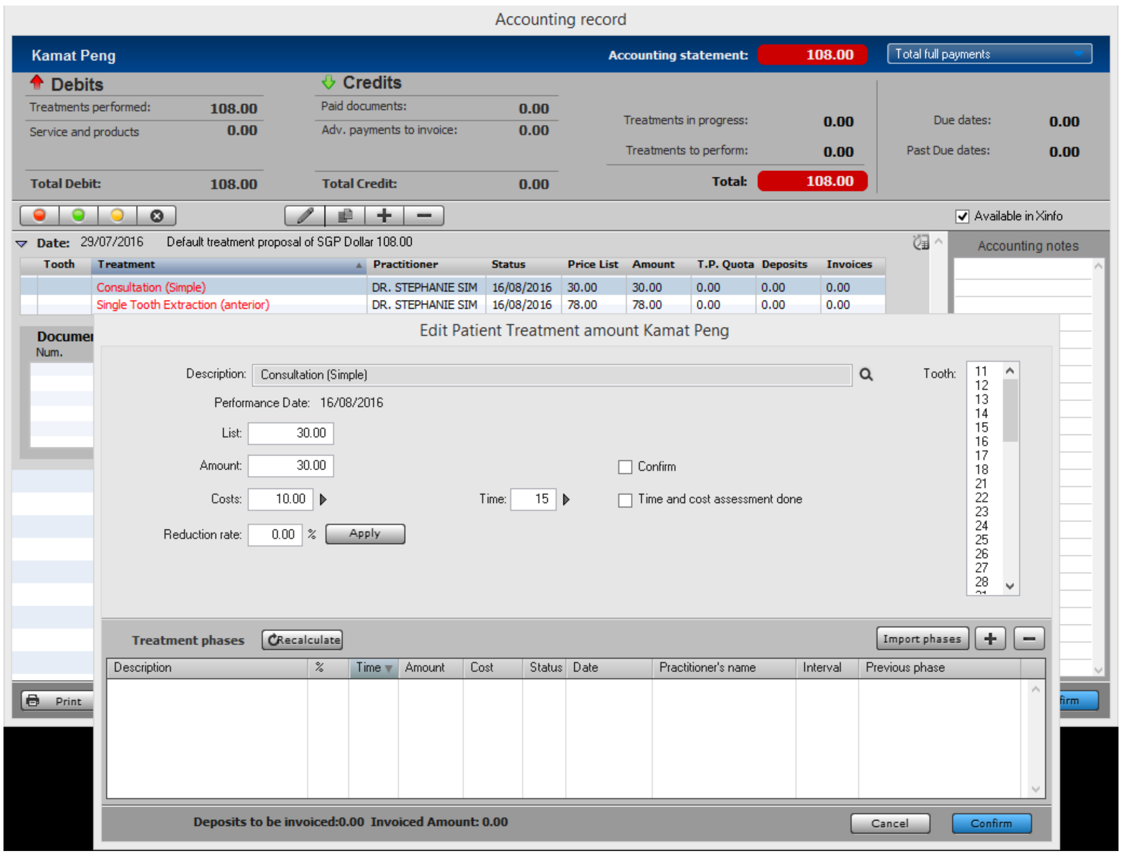
How to Edit Treatment Amount in Accounting Record?

Patient Record > Accounting

In Accounting Record, you can find all the features present in the treatment plan with the prices, and the debits and credit of the patient.

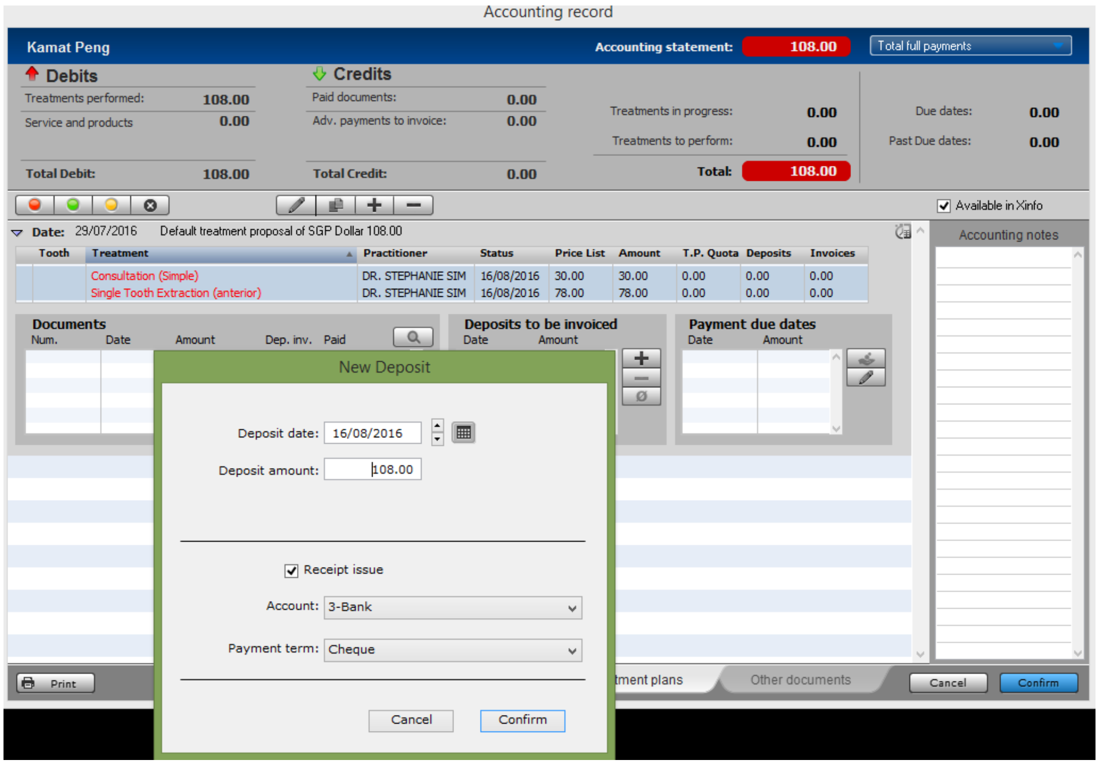
To Edit/Change, select the treatment and click edit to change the Amount and Tooth for that treatment.

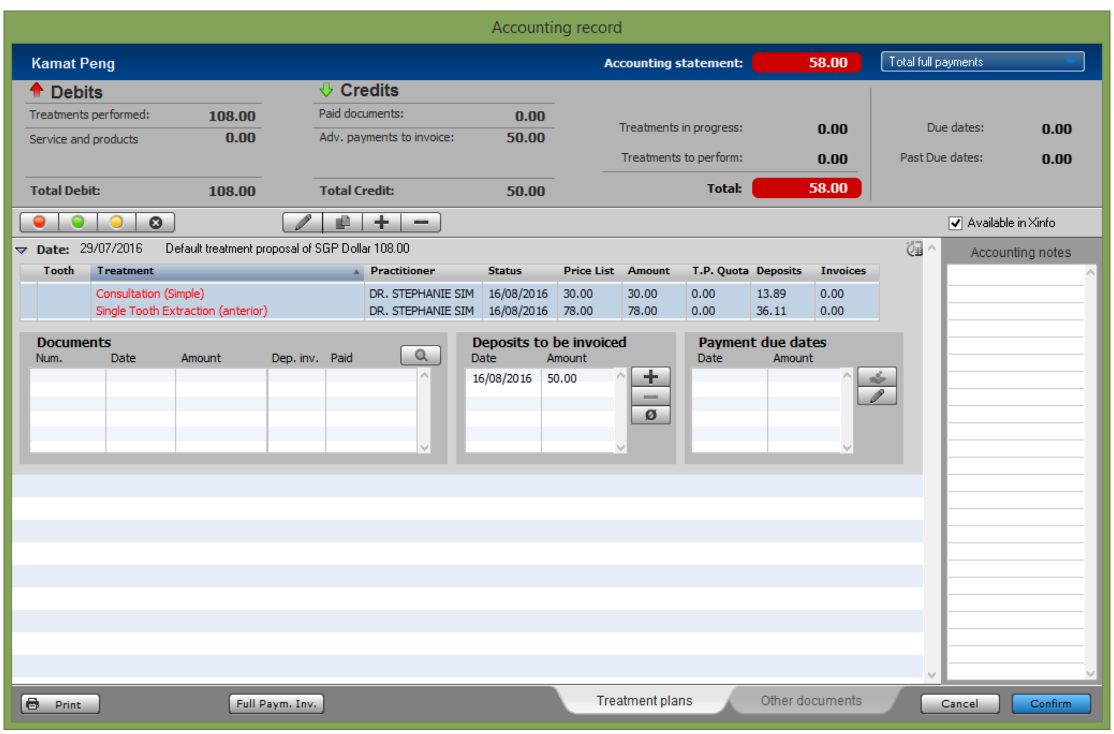
You can also ADD/DELETE the treatment from Accounting but this is not advisable.



How to Receive a Deposit in Accounting Record?

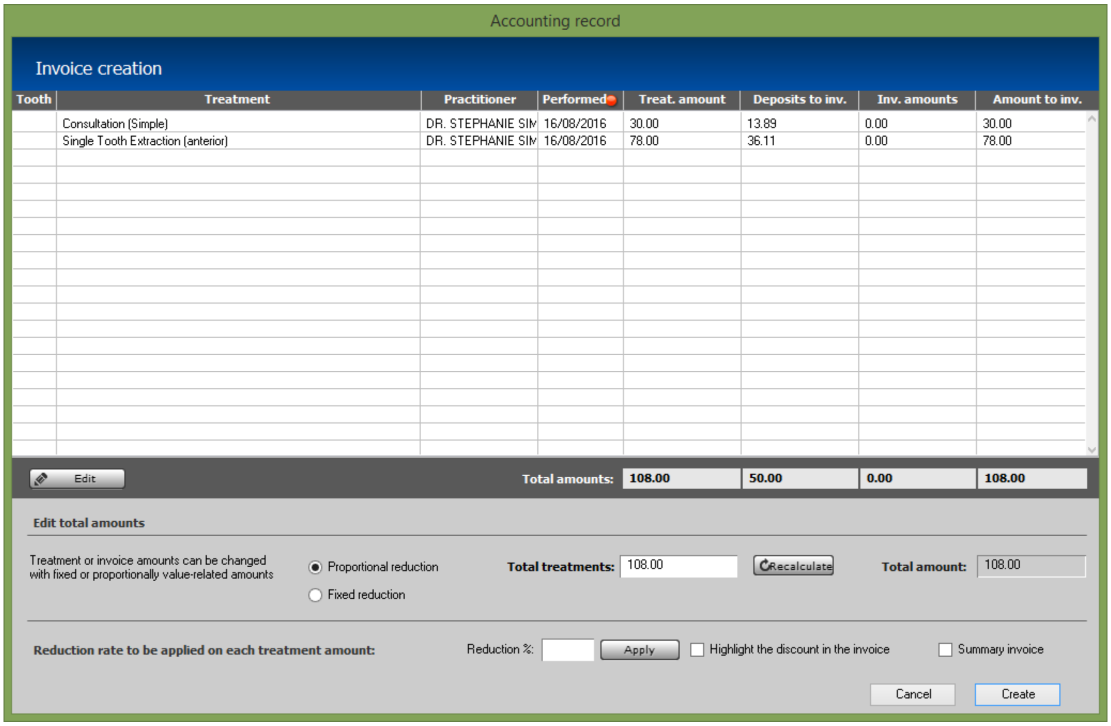
Open the patient accounting record, click “deposits to be invoiced” and enter the received amount and select payment mode.

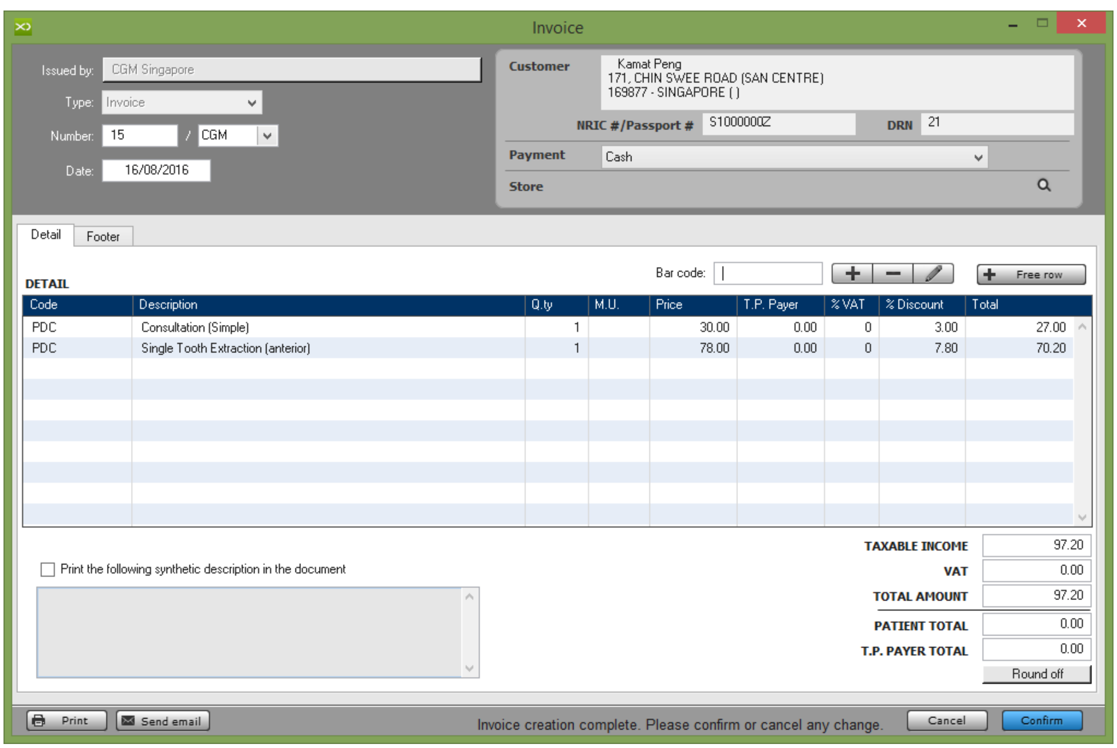




How to Issue an invoice in Accounting Record?

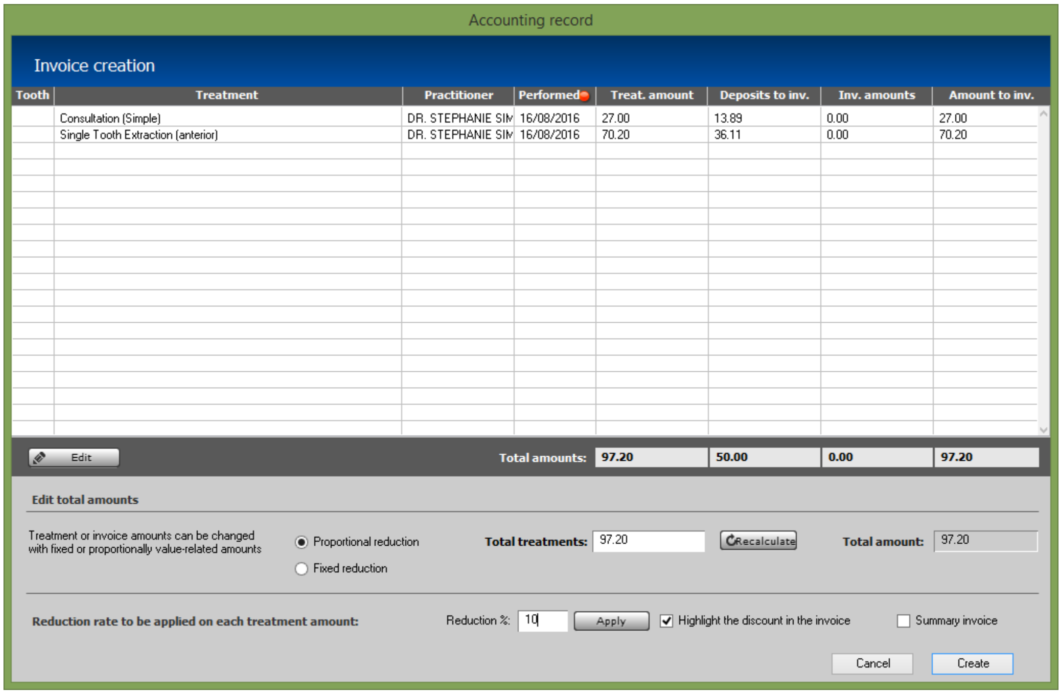
To invoice performed treatments, select the treatments to invoice from the treatment plan in the Accounting Record and click "Full Paym. Inv."

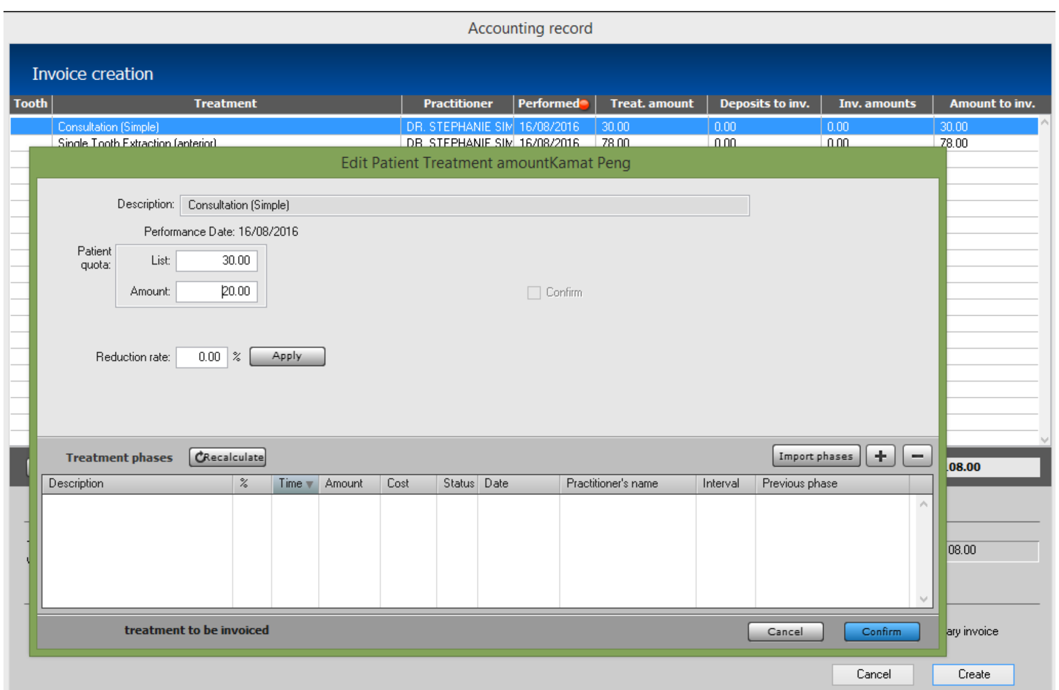




How to Indicate Discount in Accounting Record?

You can perform the Discount in Accounting record in 2 ways – either with an overall discount or discount specific to one or more treatments.
Discounts can be given in 2 types – either percentage or total amount
To highlight the discount in the invoice, tick the option.

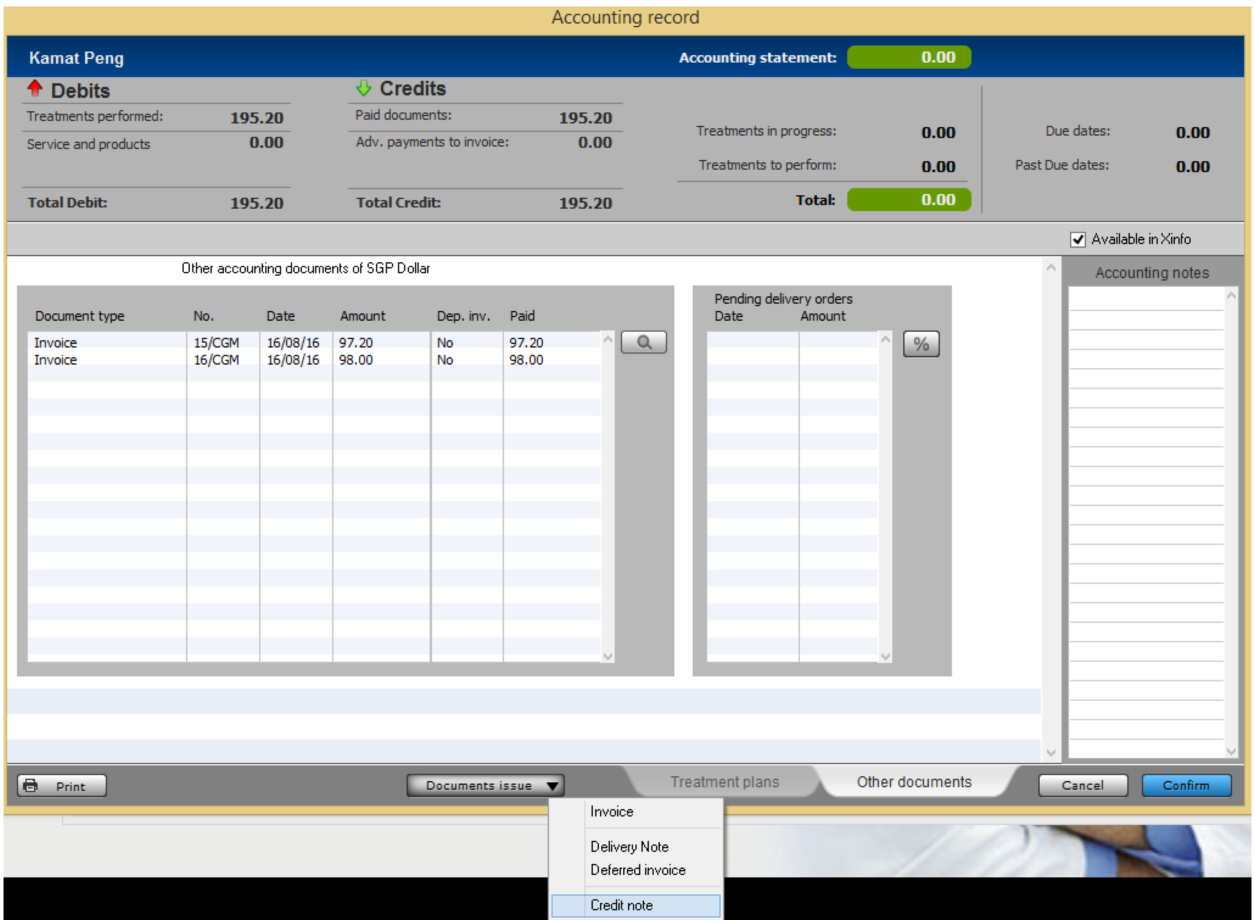


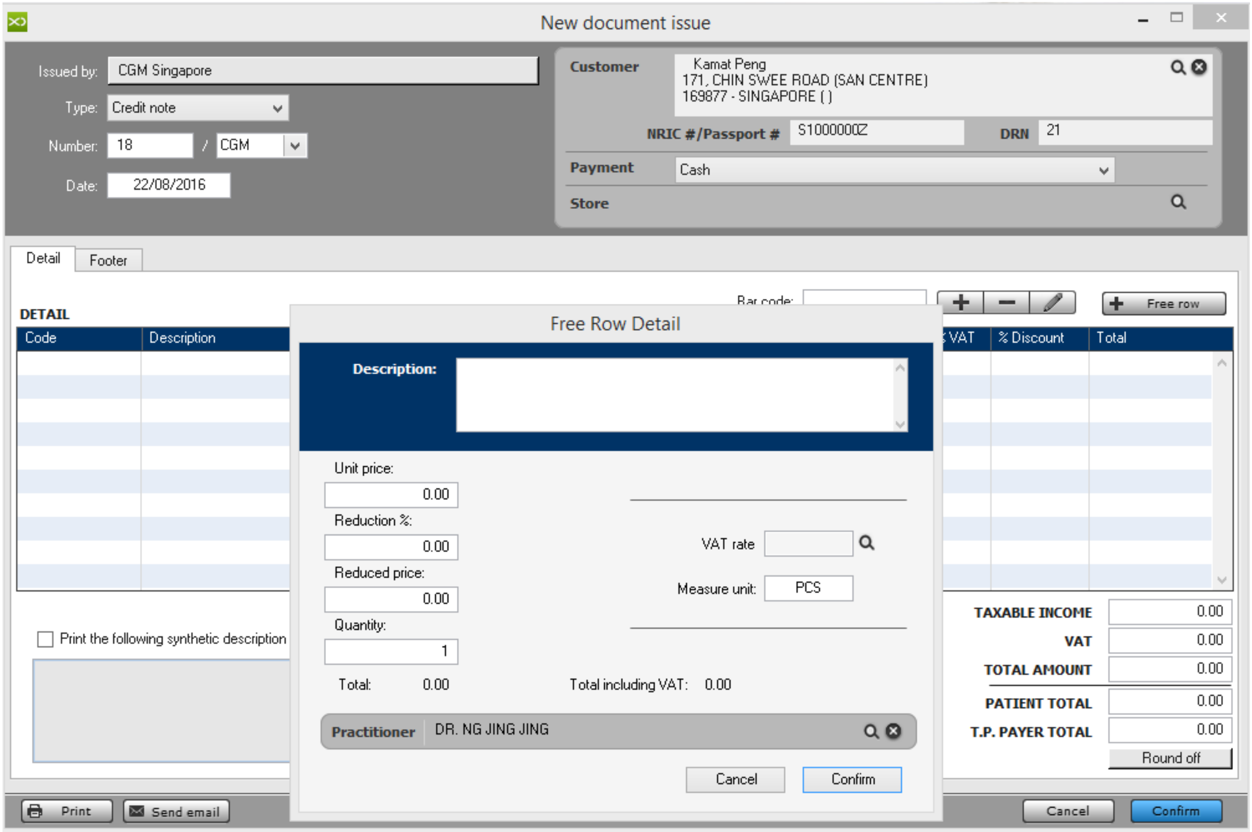


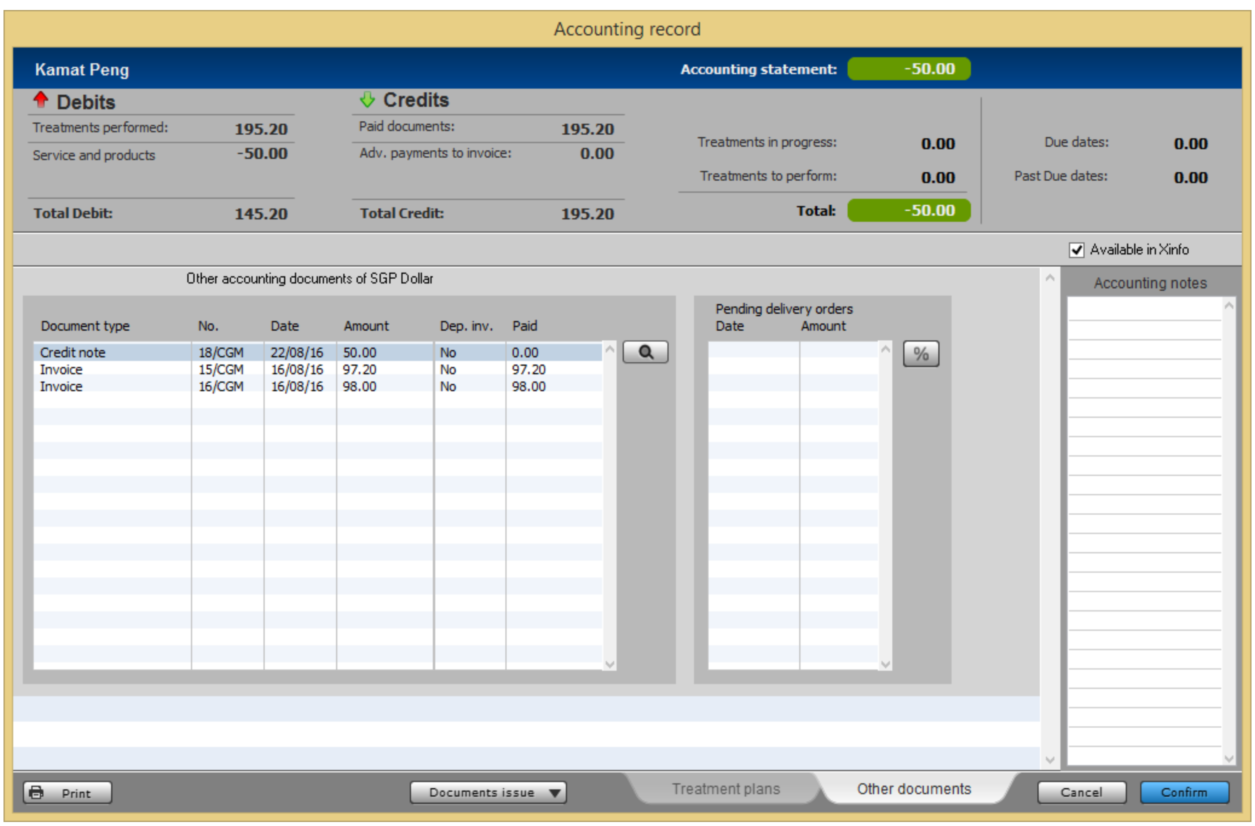
How to Issue Credit Note in Accounting Record?

For issuing a credit note in Accounting record, go to other documents and document to issue – Credit note.
A credit note can be issued directly from the patient accounting record, the payment of the credit note decreases the total amount of the documents paid. The issue of a credit note generates a prime entry transaction with "Issuing a Credit Note" type and its payment generates a prime entry transaction with "Payment of Credit Note" type.

For more detail (Refer #14.4)

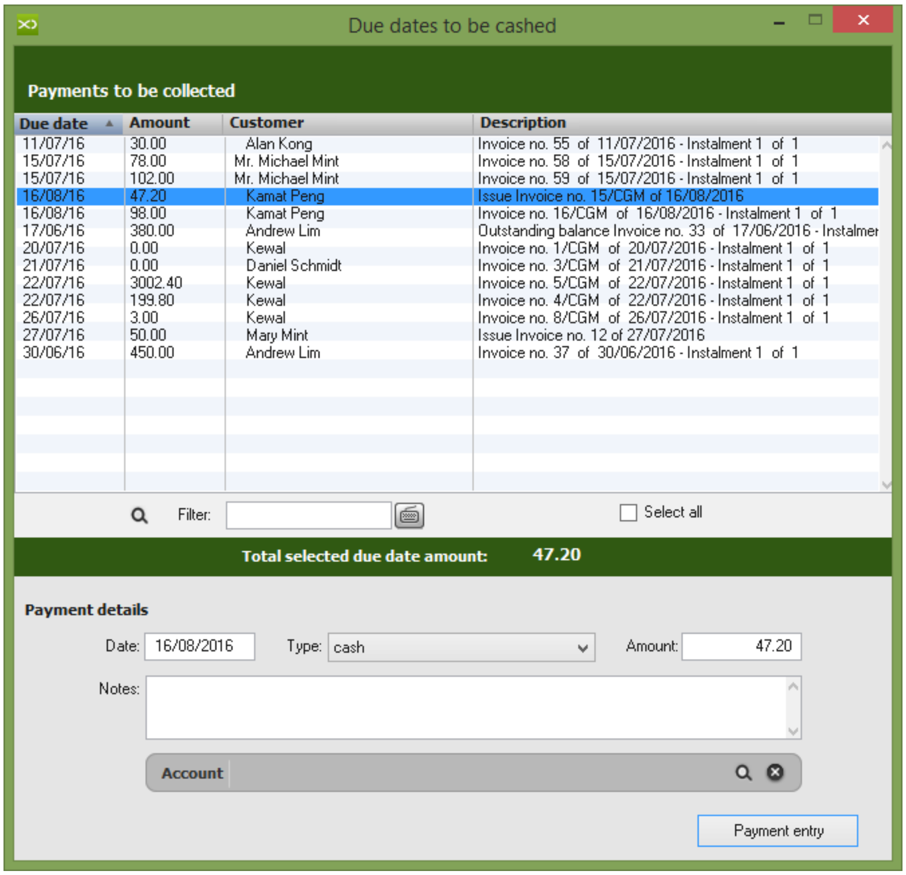


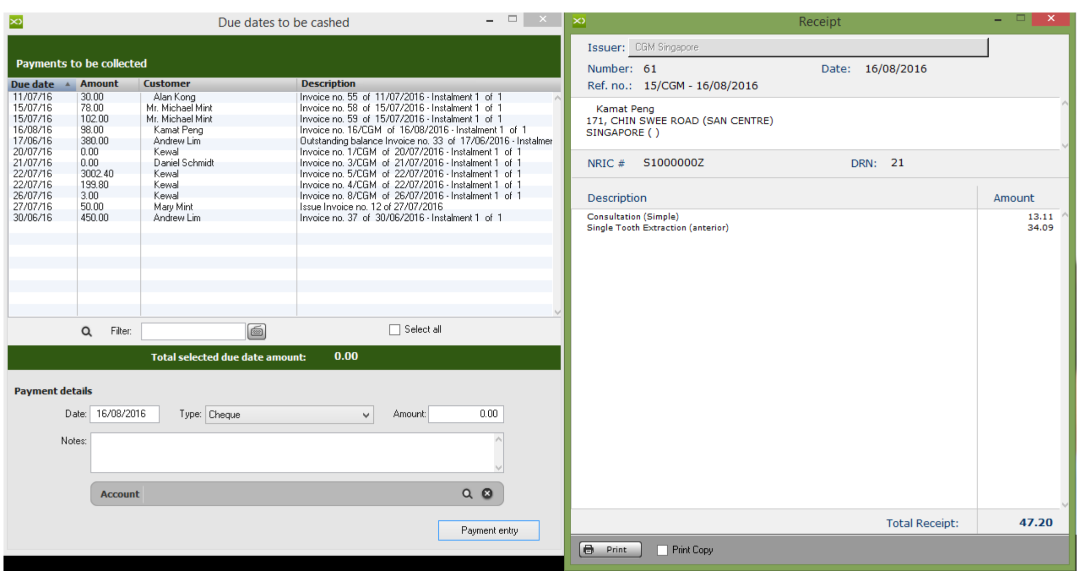

New document issue
Issued by: CGM Singapore
Type: Credit note
Number: 18 / CGM
Date: 22/08/2016
Customer
Kamat Peng
171, CHIN SWEE ROAD (SAN CENTRE)
169877 - SINGAPORE ( )
NRIC #/Passport # S1000000Z
DRN 21
Payment Cash
Store
Detail
Footer
Bar code:
Free row
DETAIL
Code
Description
VAT
% Discount
Total
Free Row Detail
Description:
Unit price: 0.00
Reduction %: 0.00
Reduced price: 0.00
Quantity: 1
Total: 0.00
Total including VAT: 0.00
VAT rate
Measure unit: PCS
Practitioner DR. NG JING JING
Cancel
Confirm
Print the following synthetic description
TAXABLE INCOME 0.00
VAT 0.00
TOTAL AMOUNT 0.00
PATIENT TOTAL 0.00
T.P. PAYER TOTAL 0.00
Round off
Print
Send email
Cancel
Confirm


Accounting record
Kamat Peng
Accounting statement: -50.00
Debits
Treatments performed: 195.20
Service and products -50.00
Total Debit: 145.20
Credits
Paid documents: 195.20
Adv. payments to invoice: 0.00
Total Credit: 195.20
Treatments in progress: 0.00
Treatments to perform: 0.00
Total: -50.00
Due dates: 0.00
Past Due dates: 0.00
Available in Xinfo
Other accounting documents of SGP Dollar
Document type No. Date Amount Dep. inv. Paid
Credit note 18/CGM 22/08/16 50.00 No 0.00
Invoice 15/CGM 16/08/16 97.20 No 97.20
Invoice 16/CGM 16/08/16 98.00 No 98.00
Pending delivery orders
Date Amount
Accounting notes
Print
Documents issue
Treatment plans
Other documents
Cancel
Confirm

How to Register a Payment of an invoice to issue Receipt in XDent?

Go to the menu bar, click “Accounting” followed by “Credit Collection”. You can view outstanding payments listed and perform payment collection.

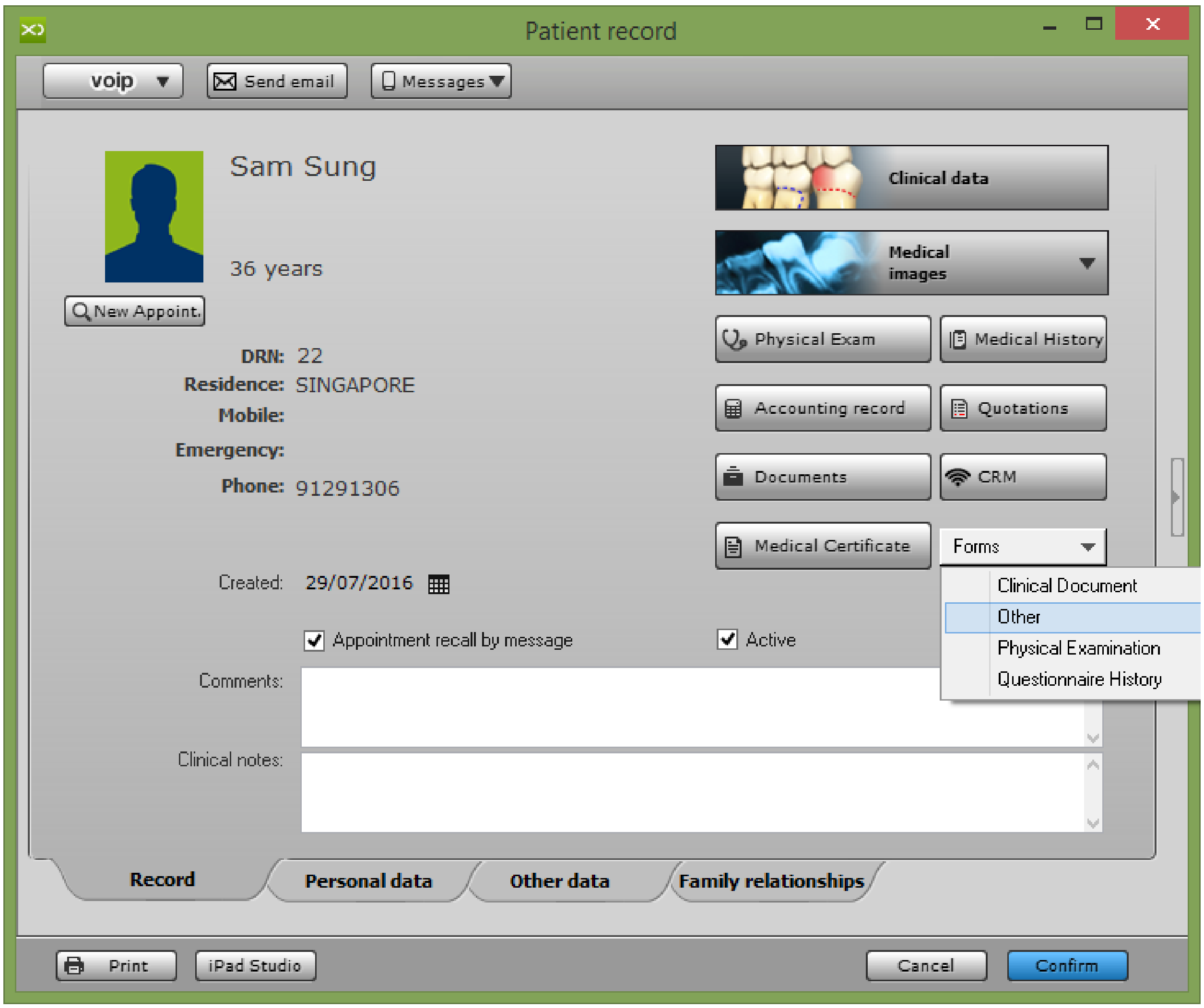


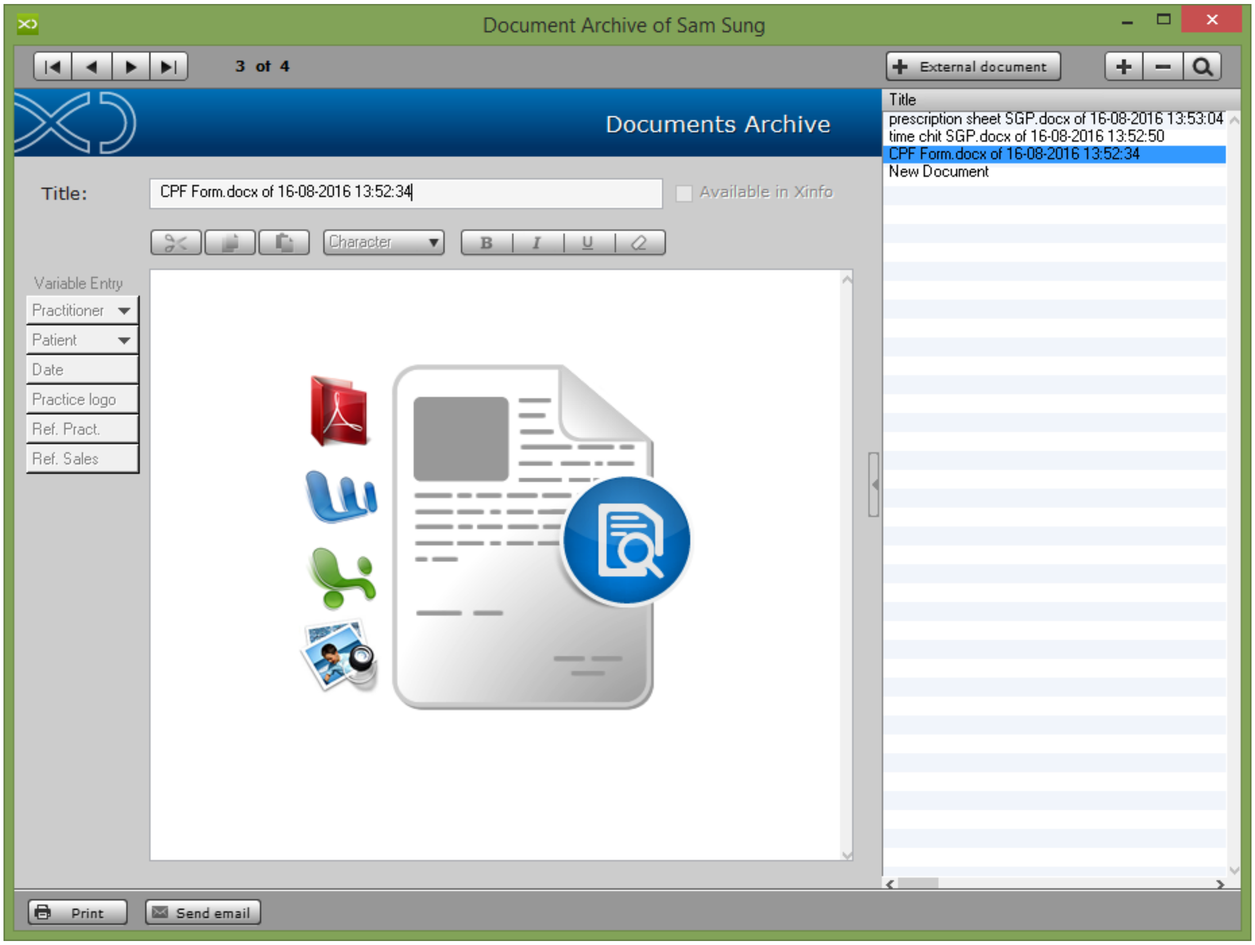


7.1.11. Forms

How to Issue Forms – Time chit; Consent form; Prescription for a Patient in XDent?

Patient Record > Forms
You can view a list of FORMS that has been assigned by category, the generated forms will appear in the Document Archive of that Patient as form history.
For more detail on Forms creation (Refer #13.2)




Document Archive of Sam Sung
3 of 4
External document
Documents Archive
Title:
CPF Form.docx of 16-08-2016 13:52:34
Available in Xinfo
Character
Variable Entry
Practitioner
Patient
Date
Practice logo
Ref. Pract.
Ref. Sales
Title
prescription sheet SGP.docx of 16-08-2016 13:53:04
time chit SGP.docx of 16-08-2016 13:52:50
CPF Form.docx of 16-08-2016 13:52:34
New Document
Print
Send email

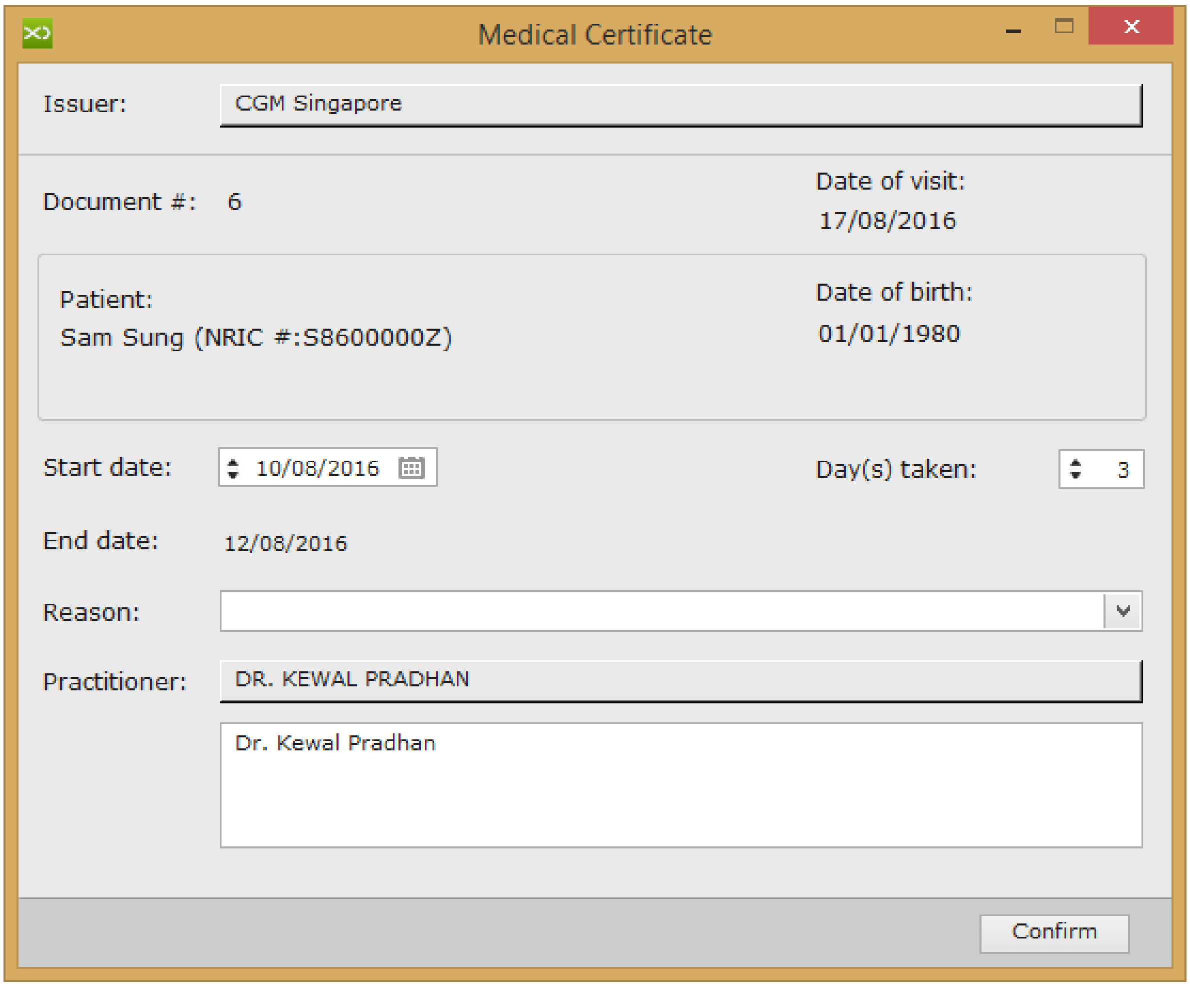
7.1.12. Medical Certificate

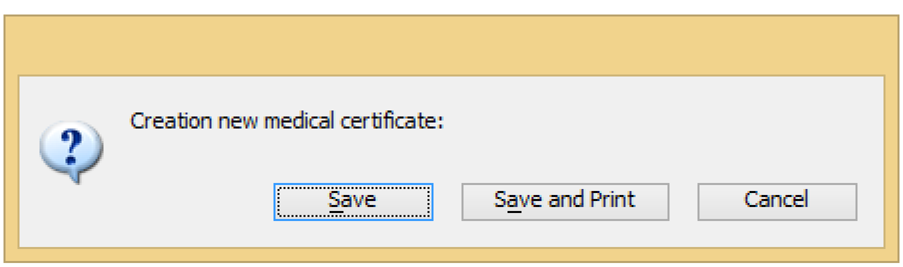
How to Issue Medical Certificate for a Patient in XDent?

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.





CGM Singapore
General Dentistry
Lebuhraya Puchong-Sg. Besi, Bukit Jalil
57100
KUALA LUMPUR
Federal Territories
+603 899 66 700

Medical Certificate

Medical Certificate Number: 6

Date of visit: 17/08/2016

This is to certify that:

Sam Sung (NRIC #:S8600000Z)

Birth Date: 01/01/1980

in unfit for duty for

1 day from 17/08/2016 to 17/08/2016

Reason:

Wisdom Tooth Extraction

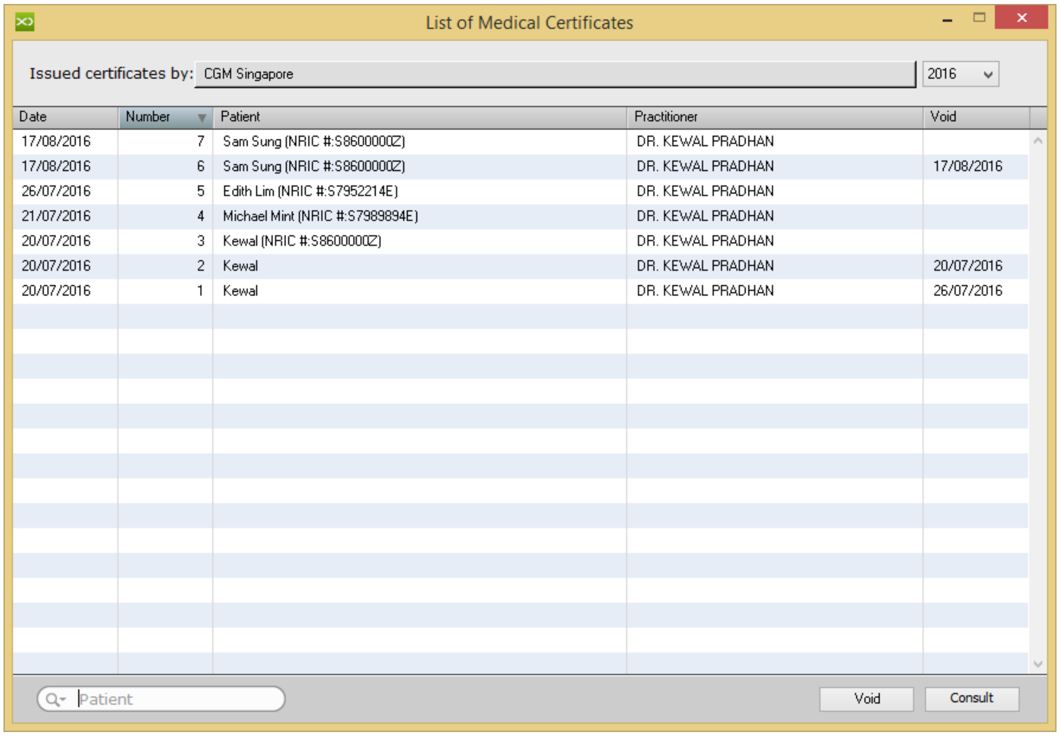
The certificate is not valid to exempt the bearer from attending court or other legal proceedings unless stated otherwise

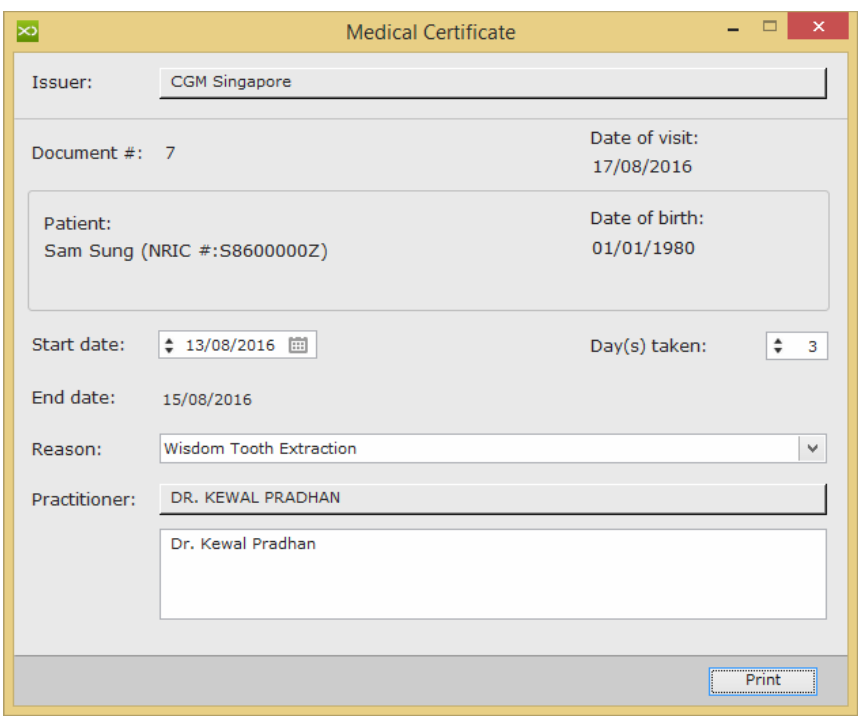
Dr. Kewal Pradhan

How to View and Void Medical Certificate in XDent?

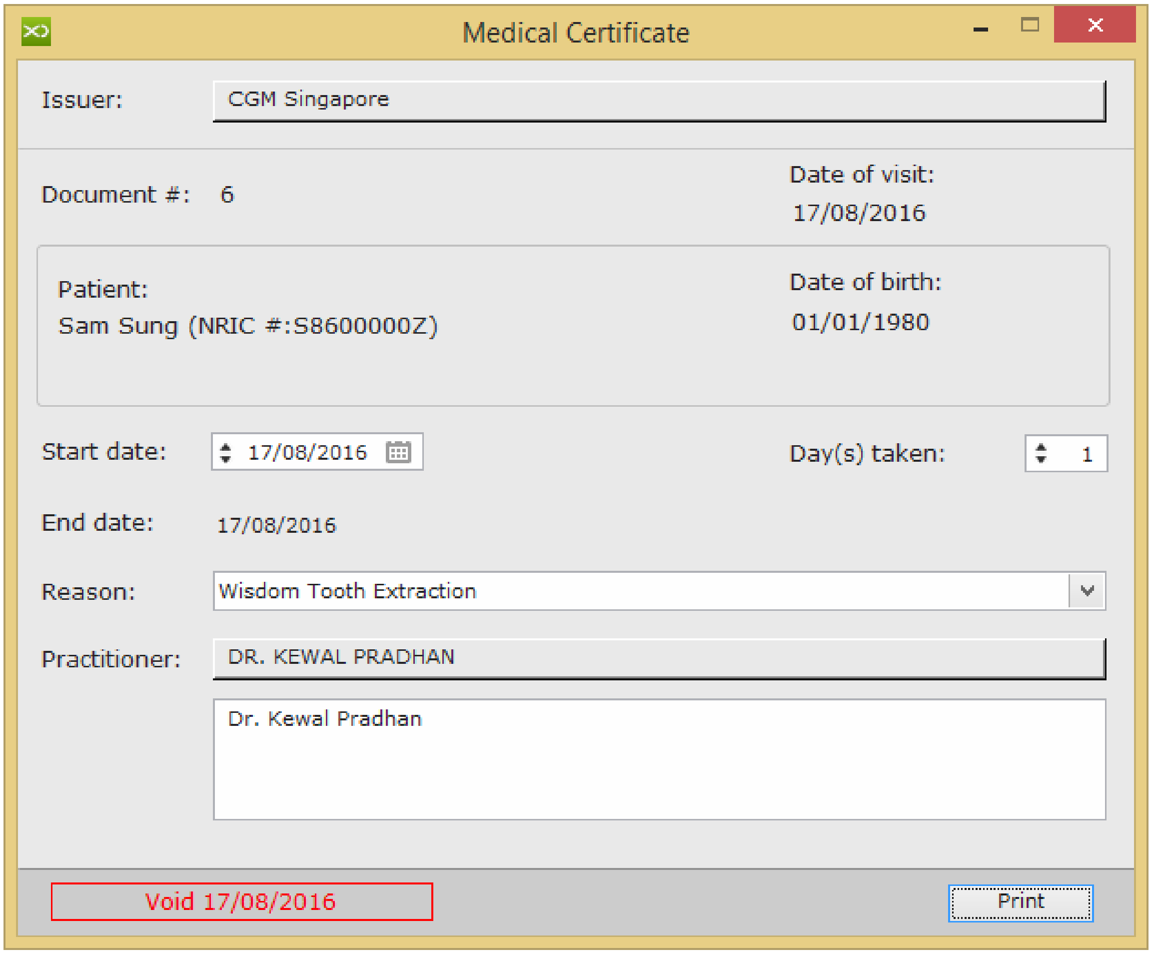
To View, go to Documents > Medical Certificate

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





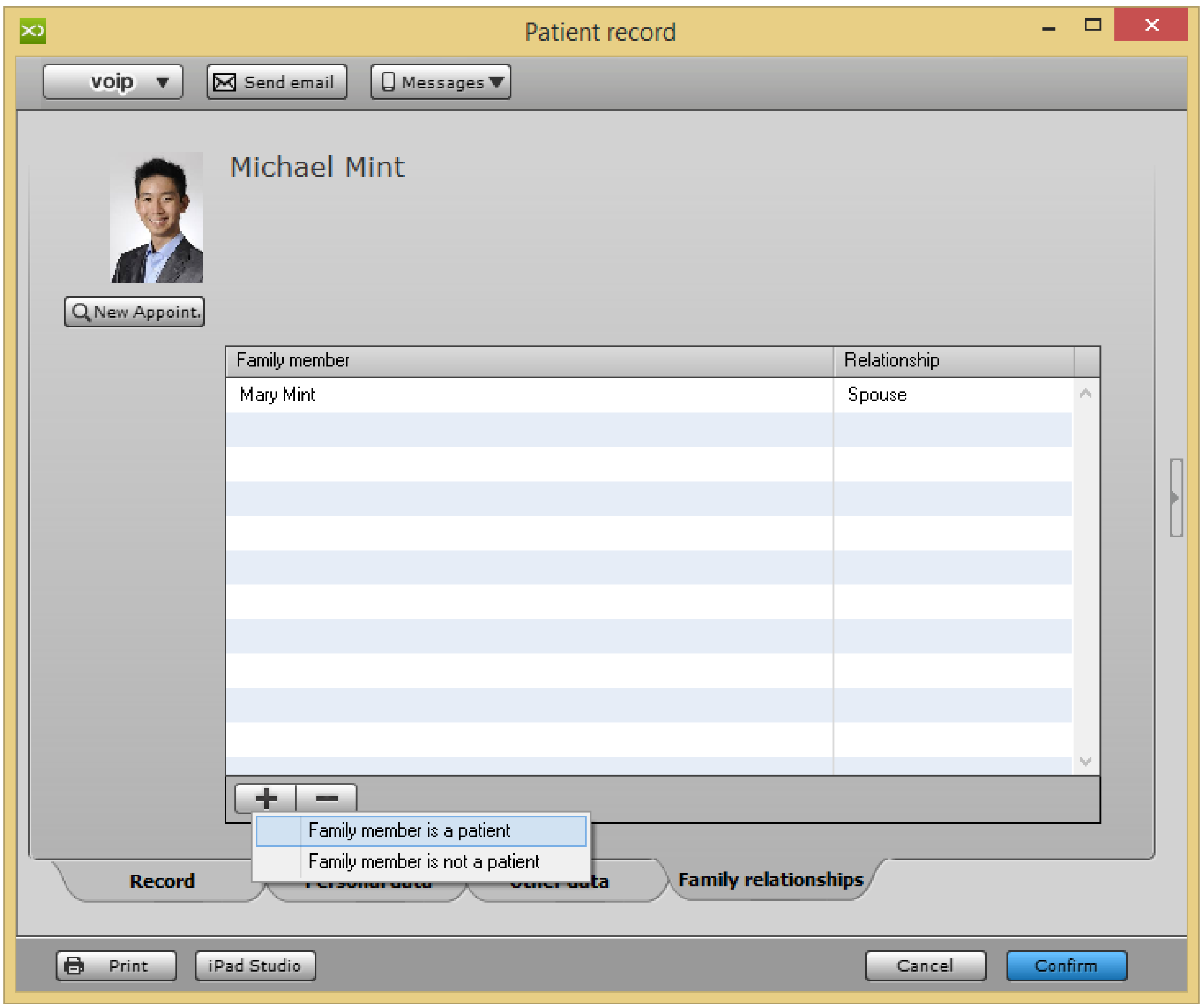
An MC cannot be deleted from XDent, only Voided and once an MC is issued, it cannot be edited.
To Void MC, select the Patient and click Void button



7.2. Family Relationship

How to Manage Family Relationship for a Patient in XDent?

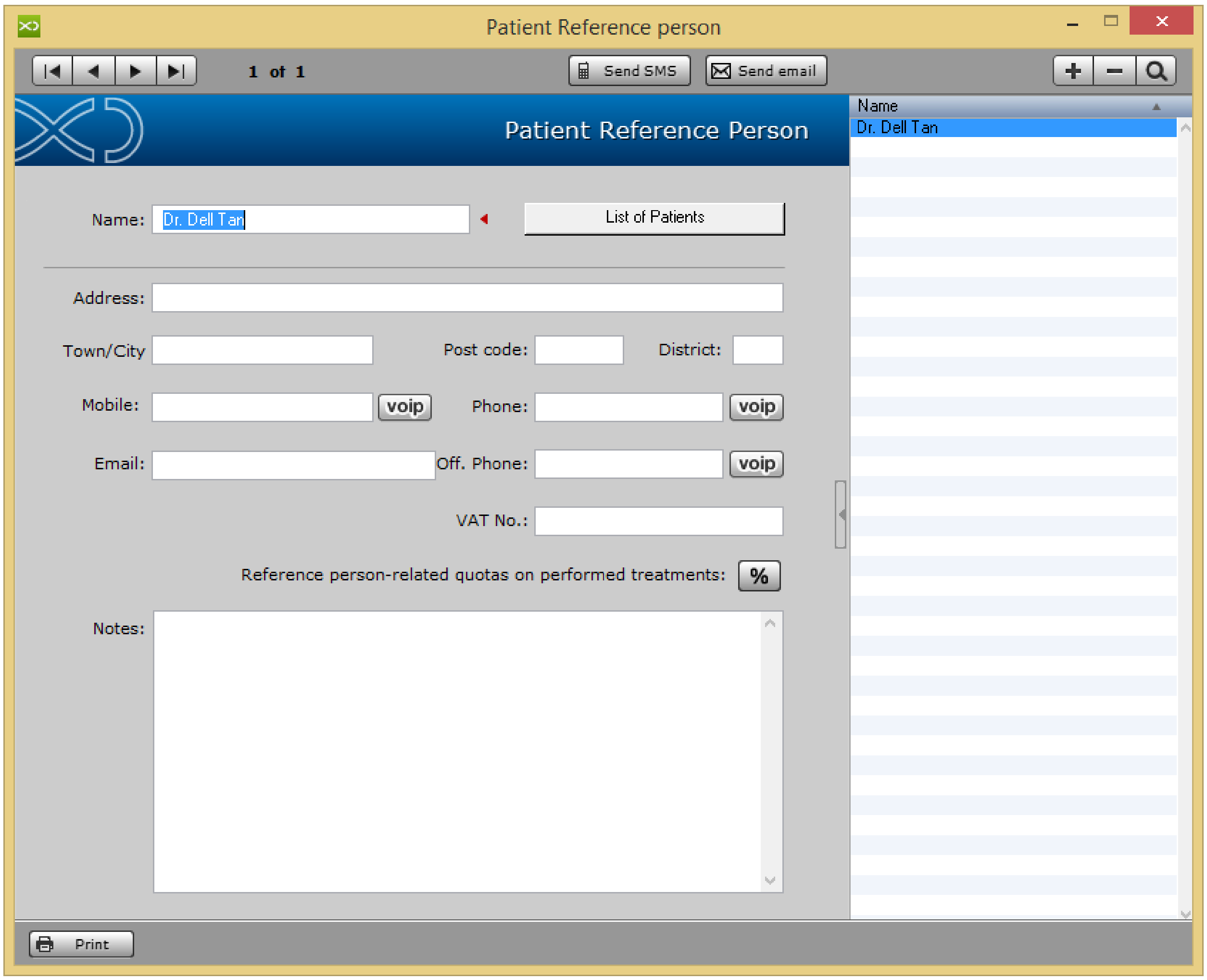
Patient Record > Family Relationships
Clinics are able to manage FAMILY RELATIONSHIP (including any inverse relations), which then can be used in the patient record panels, so as to associate a patient with his family members (who may already be practice patients or external people) and vice versa; it also allows you to access, at any moment, from a patient to any member of his family (being a practice patient).
Family relationship management on XDENT allows you to view the appointment list and also accounting record of the patient and all his/her family members.



7.3. Patient Reference Person

How to Add Patient Reference Person from other Clinic Practitioner in XDent?

In addition to all the operations provided by “other data” section for the patient, the Clinic can also input a patient reference person to track external referrals.
Go to PATIENT REFERENCE PERSON, add a new reference person and select the patient with whom he is associated.



8. AGENDA

From Patient Record, in the agenda of the practitioner associated with the patient, the Clinic can add a new appointment for the patient. XDent allows arranging appointments according to 5 different scheduling types, where the same technique is used to assign and manage a patient appointment:

- Weekly scheduling per single practitioner
- Weekly scheduling per groups of practitioners
- Daily scheduling per single practitioner
- Daily scheduling per groups of practitioners
- Weekly scheduling per grouped practices

By simply highlighting the time needed for an appointment, the same can be entered in any agenda, whereupon the appointment report is displayed where applicable:

- Select the practitioner performing the examination
- Select the practice
- Edit time and date
- Choose colour
- Choose an icon characterizing the appointment
- Choose a patient whose record, main treatment plan and diary can be displayed.
- Select the treatments/phases of the main treatment plan "in progress" or "to be performed", in which the type-related colour graphically identifies the scheduled appointment box

Once the appointment is added to the agenda,

- Moving it to another position in the current agenda is possible by simply dragging & dropping it
- Copying, cutting, deleting or pasting it by right-clicking the colour box representing the appointment in the agenda is also possible
- Reassigning it is also possible through the same right clicking operation
- Right clicking the box also allows to call the patient who has a pre-existing appointment
- In order to register the waiting and examination time, to display them in patient records and to detect them at a later stage also through the relevant Appointment reports. Change status – this function is useful to know the Patient waiting time and Check Out time from Clinic, you can change “Check In” / “App. Start” / “Check Out”. When the patient shows up, managing the appointment is possible by right clicking the box to indicate:

- when they arrive (check-in)
- when the examination starts (app. start)
- when the examination ends (check-out)

Planning Weekly/Daily

The weekly / daily planning is done in the Agenda of the clinic and 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 like XRAY Rooms, Dental Chairs, Other Rooms, etc.

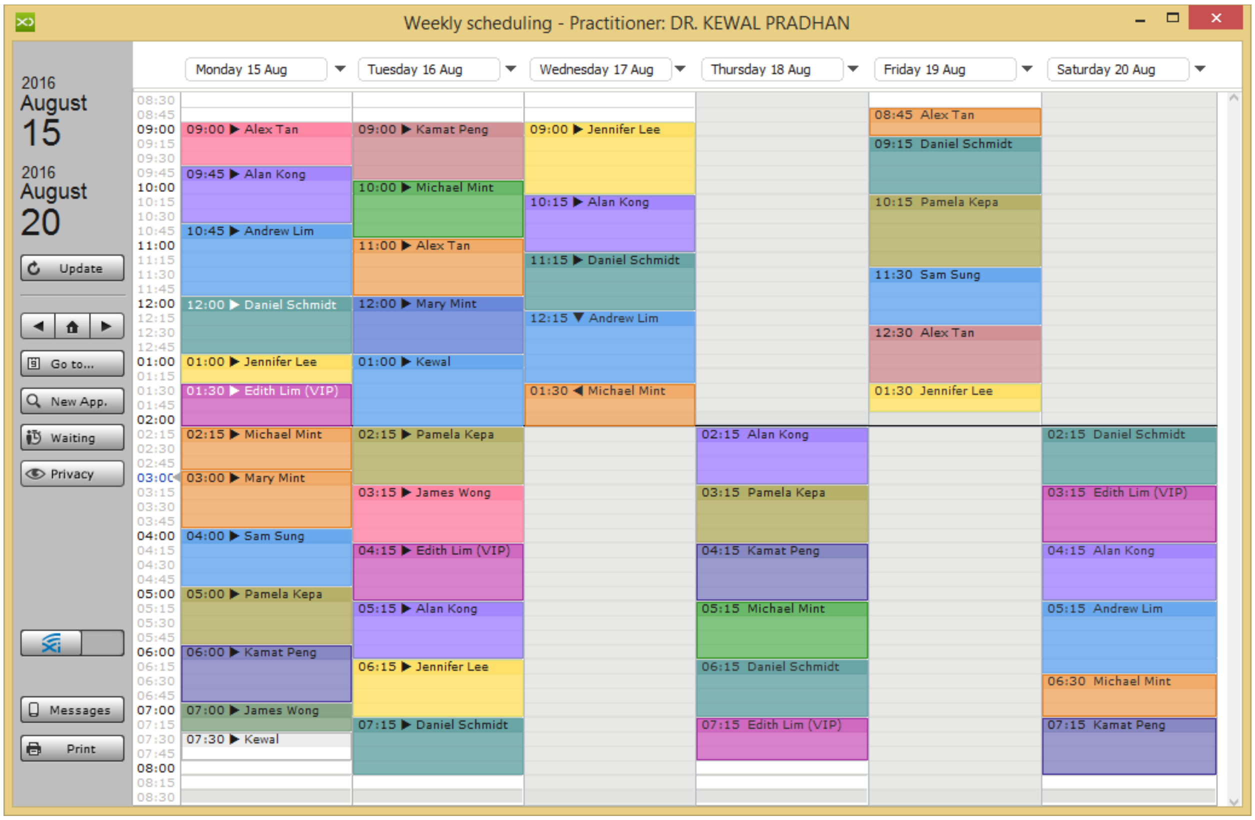
Depending on the type of clinic organization, choose the desired planning. The window Weekly / Daily Planning is displayed at time intervals of 15 minutes that allow the assignment of appointments (Refer #4.1).

8.1. Weekly Scheduling

How to view Weekly Schedule of Practitioner in XDent?

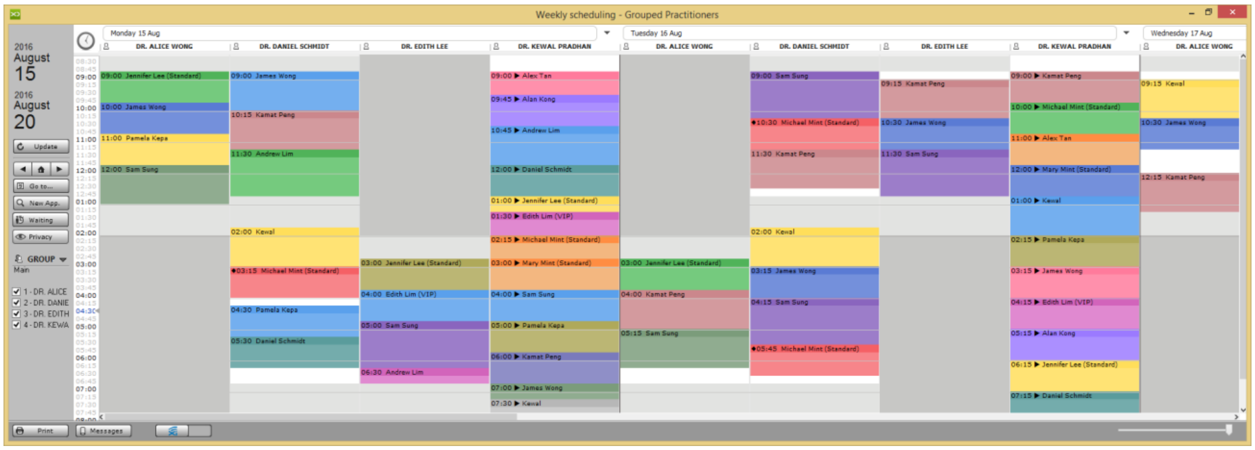
Go to Agenda > Weekly Scheduling

This will show a weekly schedule of a selected practitioner



How to view Weekly Group Schedule of Practitioners in XDent?

Go to Agenda > Weekly Schedule – Grouped Practitioners
This will show a weekly schedule of a group of practitioners.
Under Schedule Setting, you can create your own practitioner grouping for each workstation (Refer #4.2)

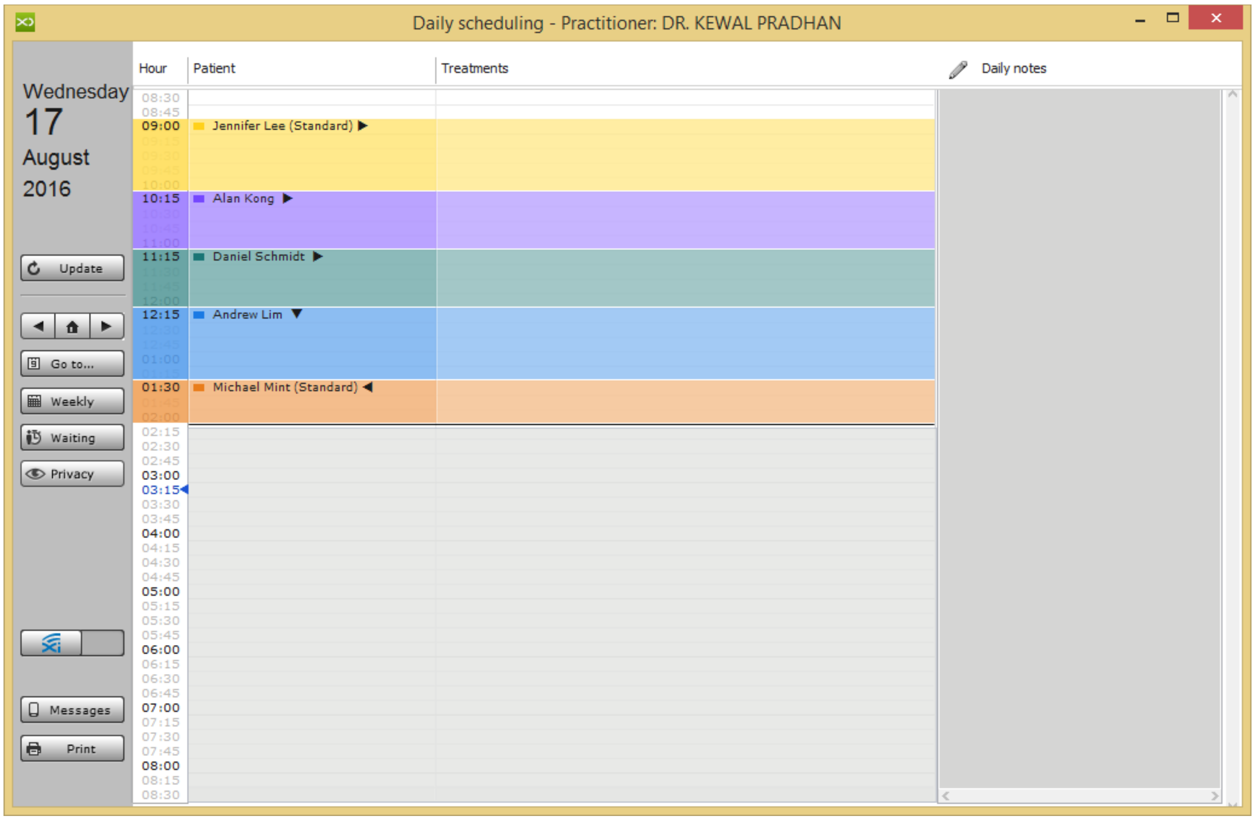


8.2. Daily Scheduling

How to view Daily Schedule of Practitioner in XDent?

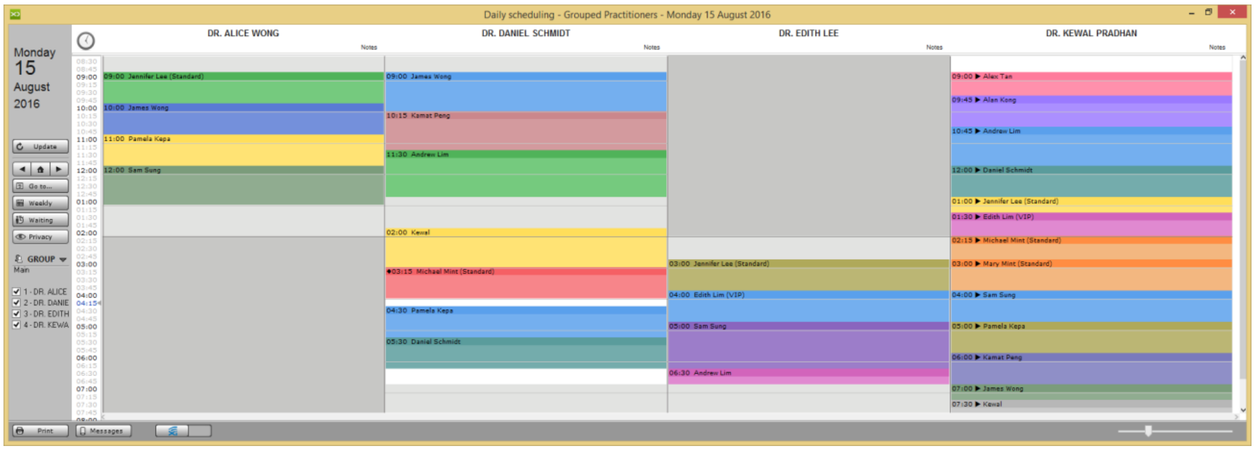
Go to Agenda > Daily Scheduling

This will show the daily schedule of individually-selected practitioners.



How to view Daily Group Schedule of Practitioners in XDent?

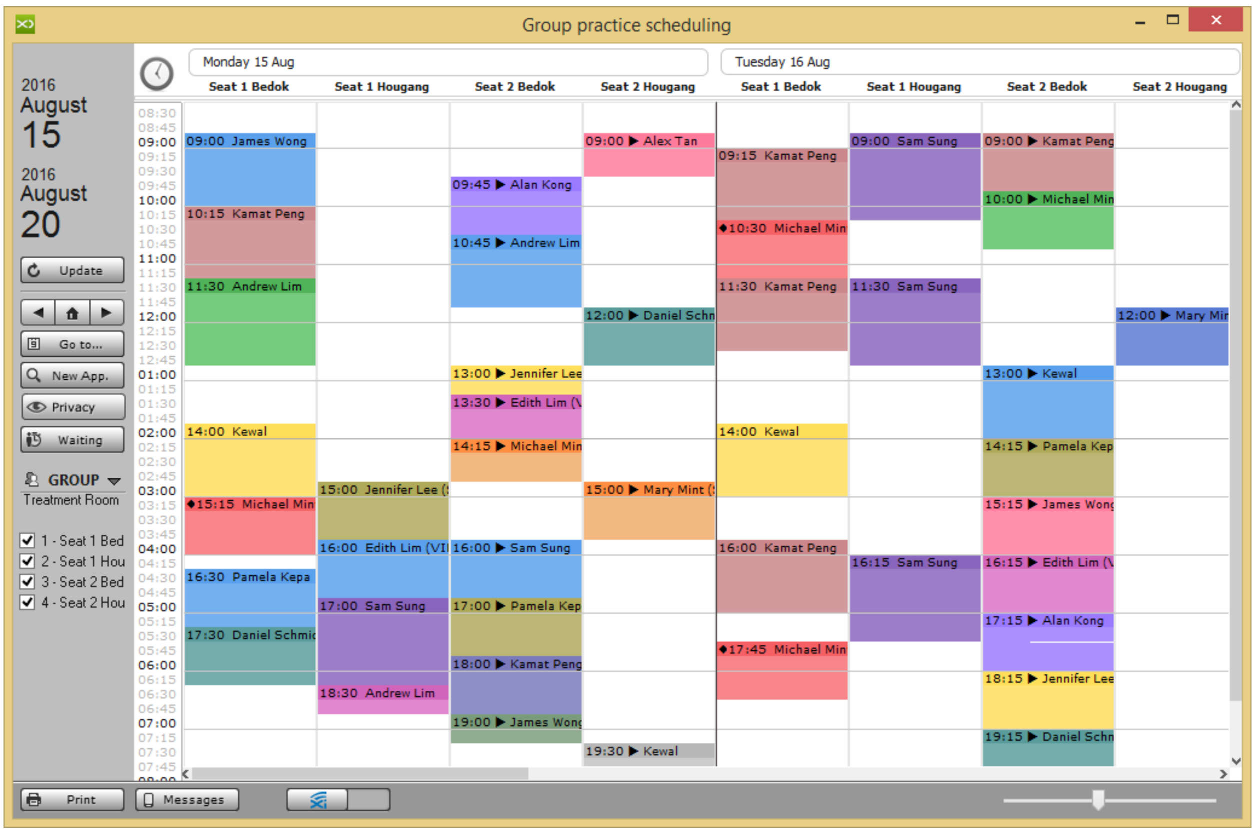
Go to Agenda > Daily Schedule – Grouped Practitioners
This will show a daily schedule of a group of practitioners.
Under Schedule Setting, you can create your own practitioner grouping for each workstation (Refer #4.2)



8.3. Practices Scheduling

How to view Practices Schedule in XDent?

Go to Agenda > Practice Scheduling
This will show a weekly schedule of practices.
Under Schedule Setting, you can create your own practices grouping for each workstation (Refer #4.2)

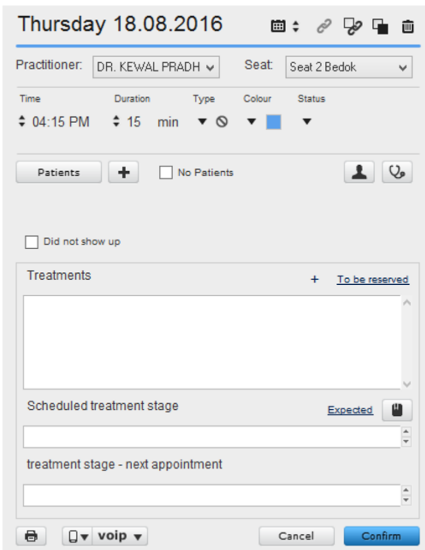


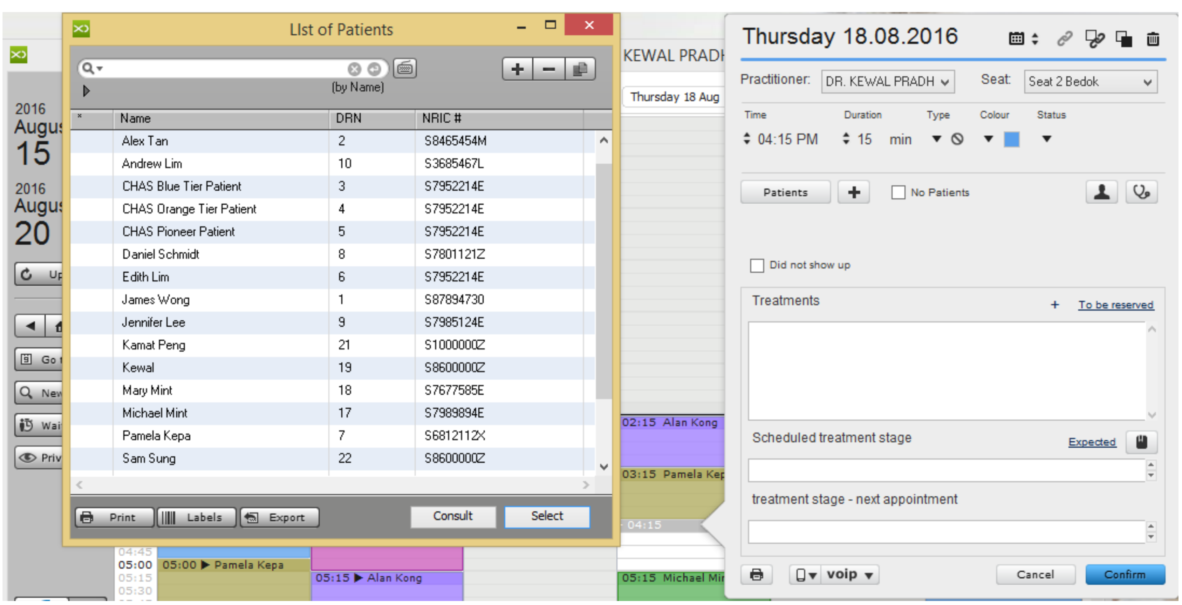
8.4. Appointments

How to Add Appointments for Patients in XDent?

To insert a new appointment, double-click with the mouse on the time match desired. It opens a detailed window "appointment" that will allow you to choose a patient from 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.

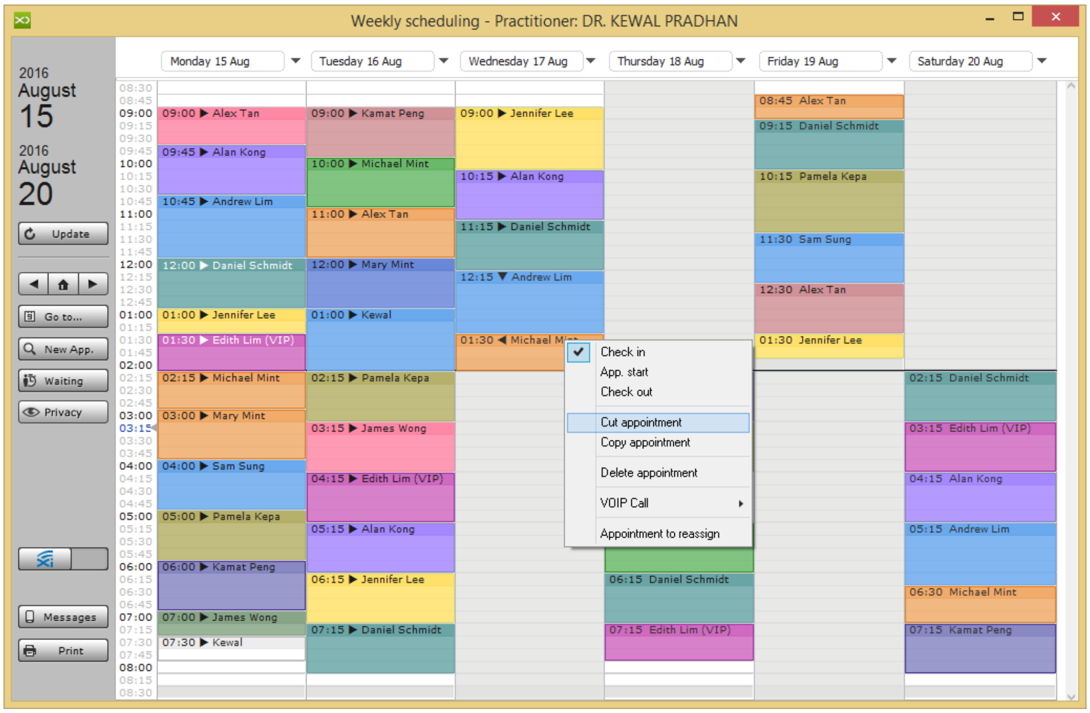
From the appointment window, you can directly access a patient's record through the appropriate button "Patient Record".

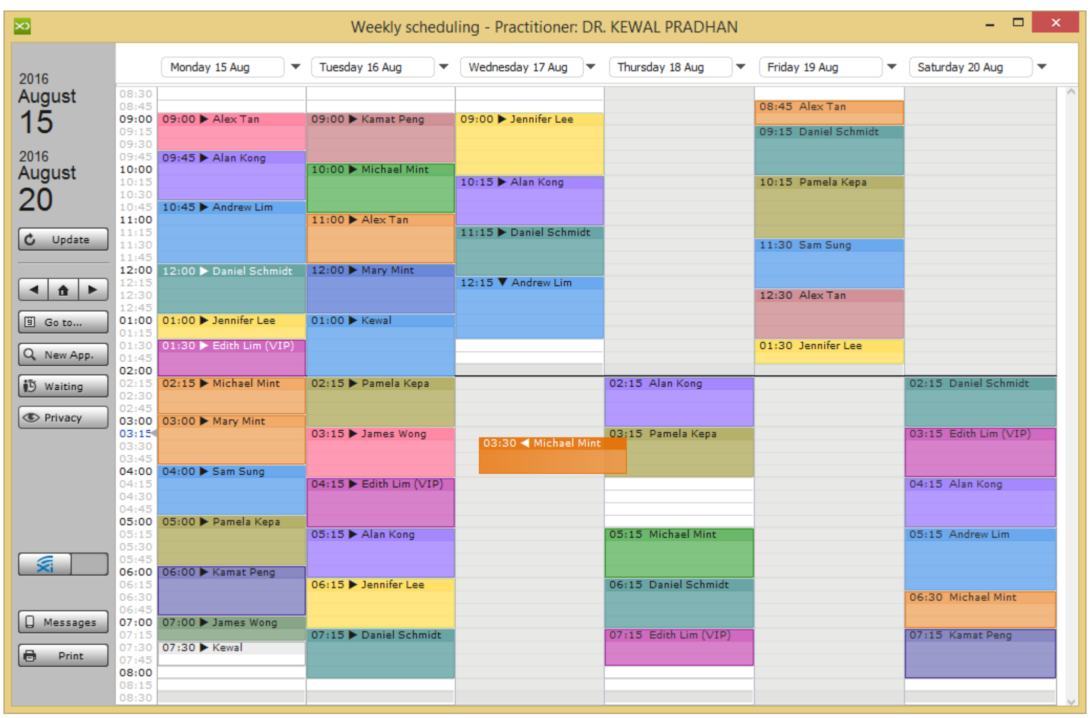




How to Move/Adjust an Appointment?

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 and reschedule and paste it to the new location. Alternatively, you can drag and drop the appointment to another slot.

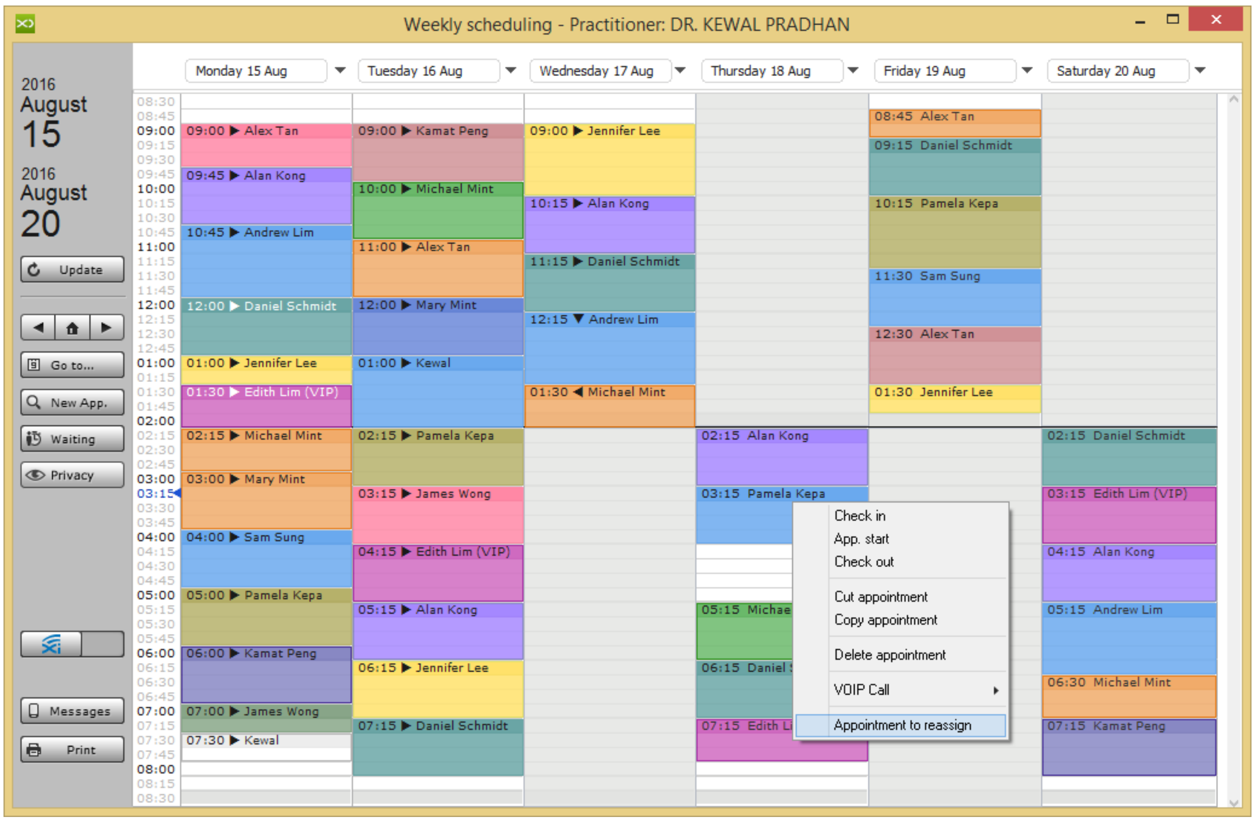




How to Manage Missed Appointment?

For patients who have missed an appointment and need to reschedule, right click on the appointment and select “Appointment to reassign”. The selected appointment slot will be transferred to the waiting list – pending an appointment slot becoming available

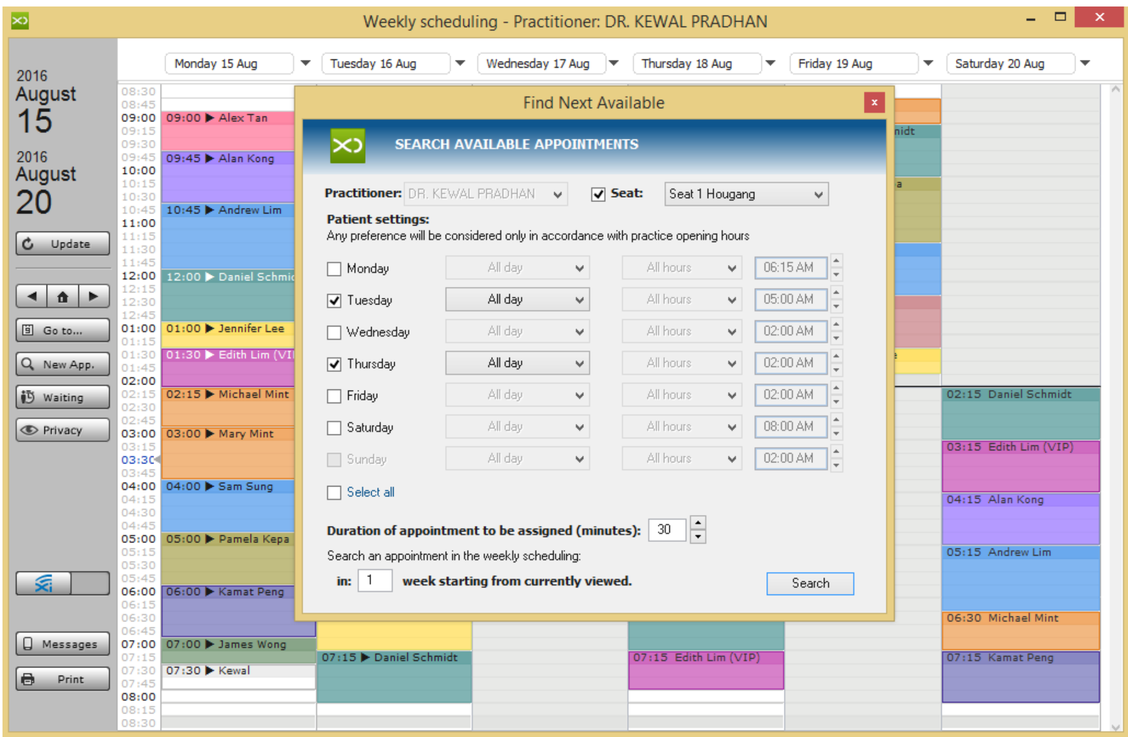
In Appointment Report, clinic able to generate report for those patient who missed the appointment.

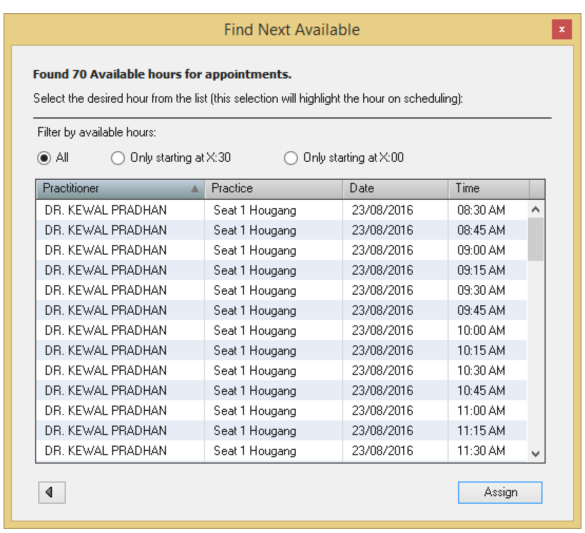


How to Search for a new appointment based on Patient Availability?

On Schedule screen via the button "New App." in the left bar of the Schedule, you can define the search function for a new appointment by specific hours and time ranges during which a patient is available for an appointment.

This search function automatically detects the list of possible appointments for the first available appointment according to the patient's needs. If a patient has no preferences, check the “select all” box to enable or disable all days with just one click.

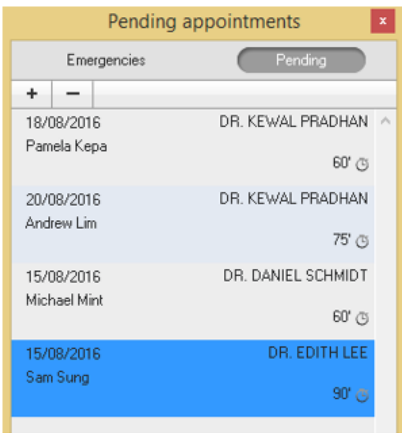


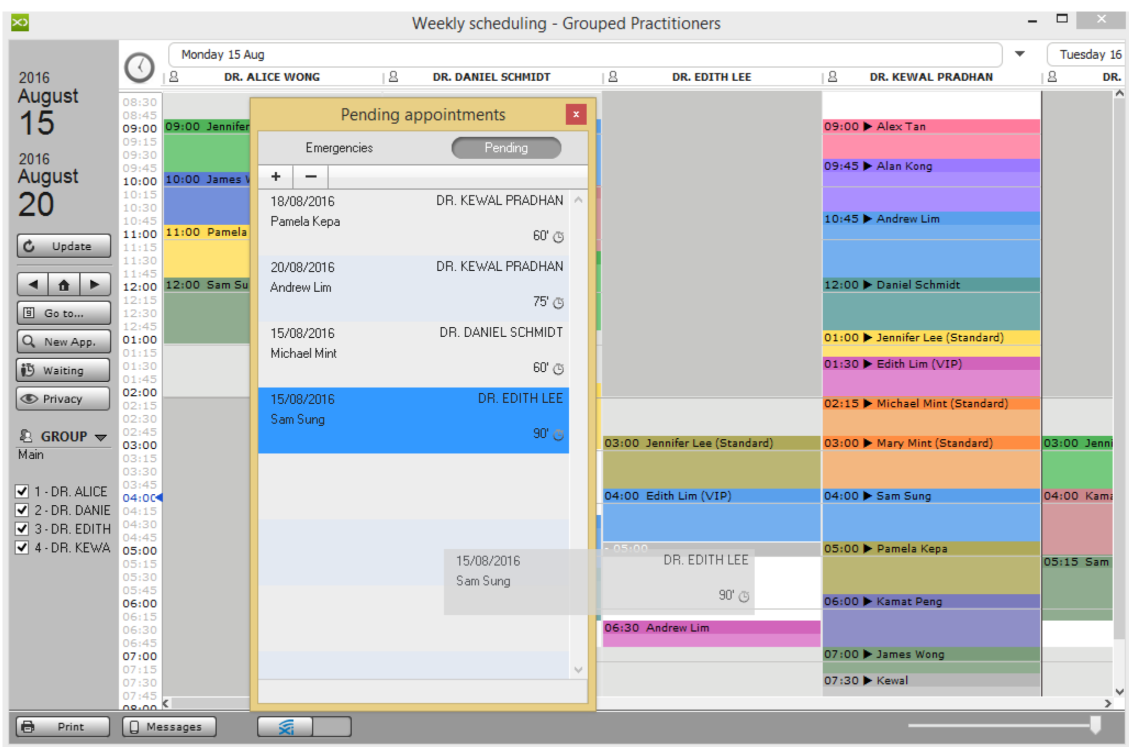


How to Manage Pending Appointment?

Pending appointments can be managed directly from the scheduling. The corresponding "appointment to be reassigned" entry can be accessed by right-clicking the appointment in the agenda and from there the appointment can be defined as pending.

Once an appointment is defined as pending, it is added to the list of pending appointments, which can be accessed by clicking the corresponding button in the low-left portion of the agenda. From the same list, information about the pending appointment can be edited or deleted and the appointment can be reassigned in the agenda through a drag & drop operation if desired.

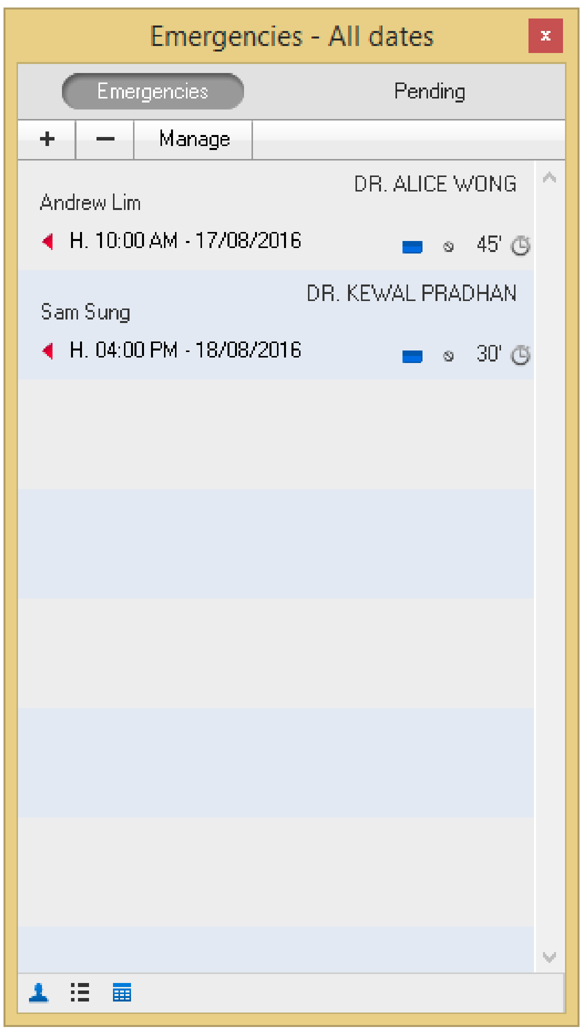


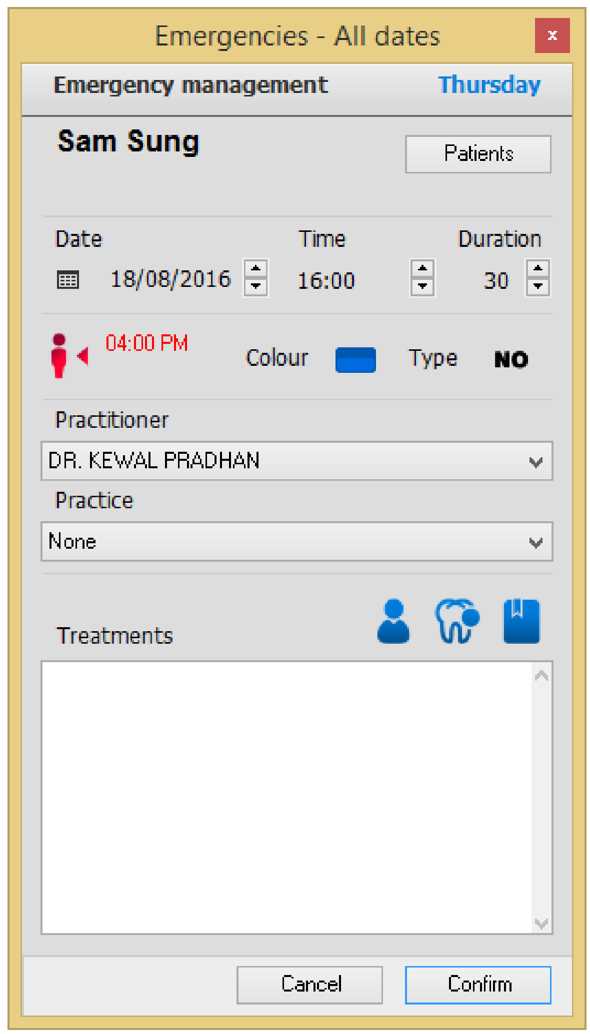


How to Manage Emergencies appointment?

An Emergency appointment can be added and managed totally independent of scheduled appointments. This function can be accessed from the lower-left button displayed in a scheduling. All data referring to the emergency can be specified for each case. The same screen also gives access to a patient's main treatment plan, treatment diary and record.

Emergencies displayed in the list are filtered based on the enabled practitioner. It is possible to visualize emergencies associated with all practitioners through the corresponding button in the lower-left portion of the emergency list. Via the "Waiting" button, XDENT allows to manage emergencies and suspended appointments.





How to Send Reminder to the Patient for the Appointment Scheduled for today and next day?

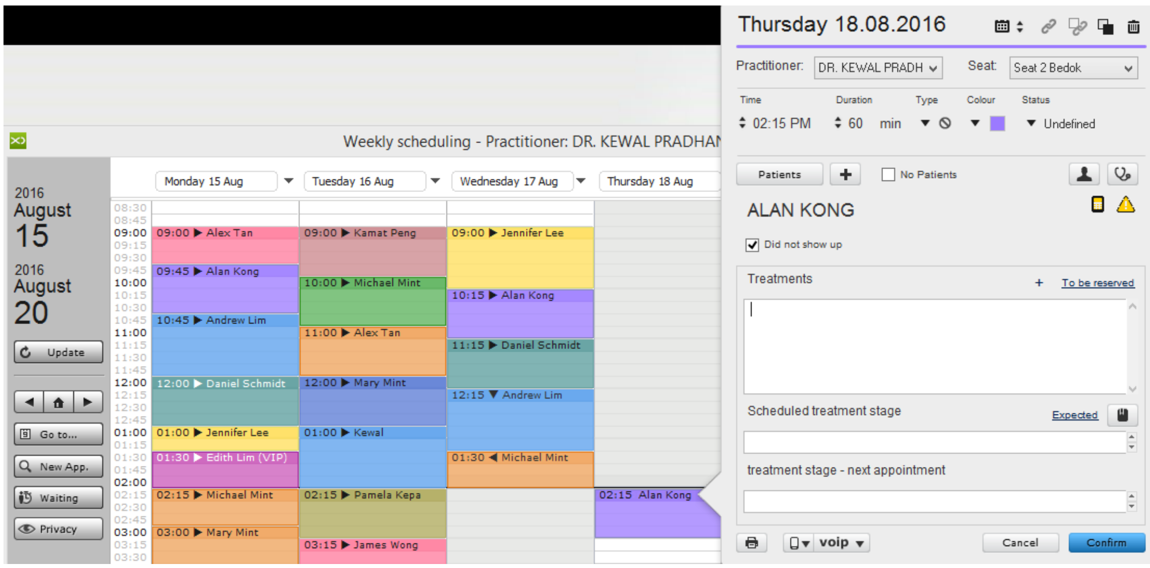
Click the "Message" button of the lower left side of Schedule Screen, and send a reminder to today- and tomorrow-scheduled patients via SMS.

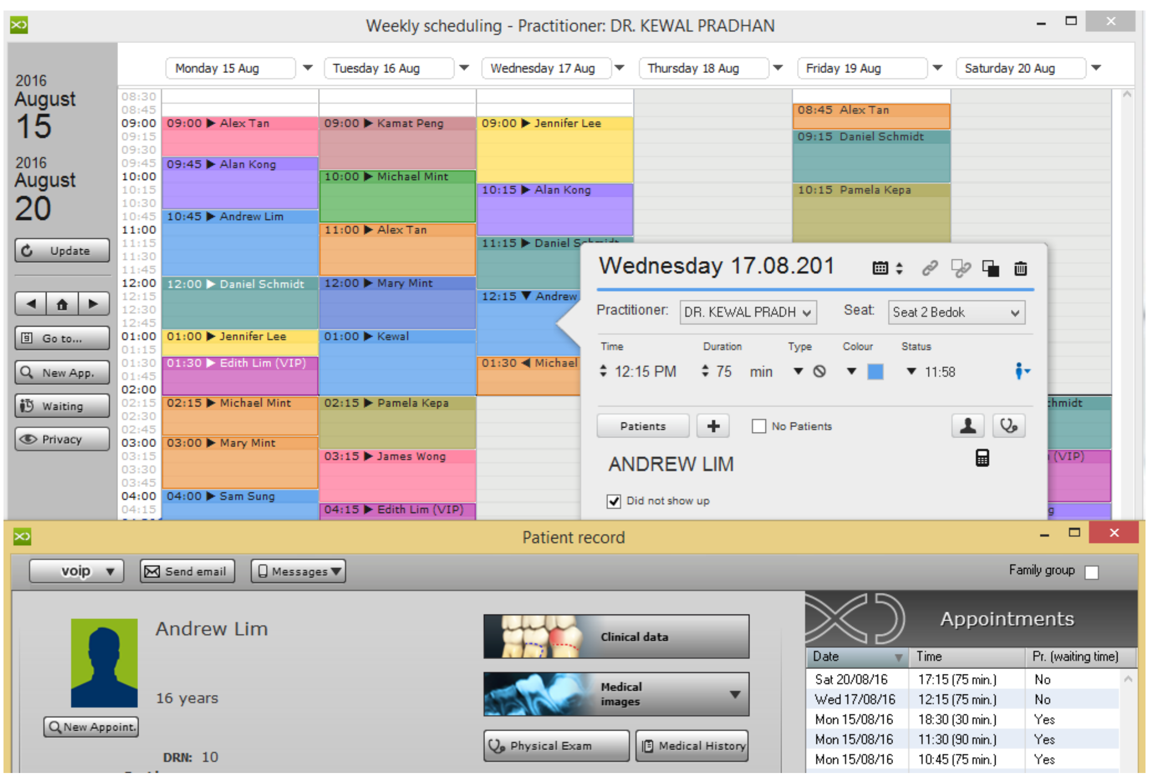
Default message text can be managed from XDent General setting, under the communication tab (Refer #4.4)

How to Manage Patient who didn't show up for the Appointment?

To manage patients who didn't show up for the Appointment, double click the Patient schedule to open the detail window and then tick "Did not show up"

If the patient did not show up, the appointment history for that patient will show NO under waiting time. The Clinic can also generate a report to locate patients who didn't show up for their appointments.





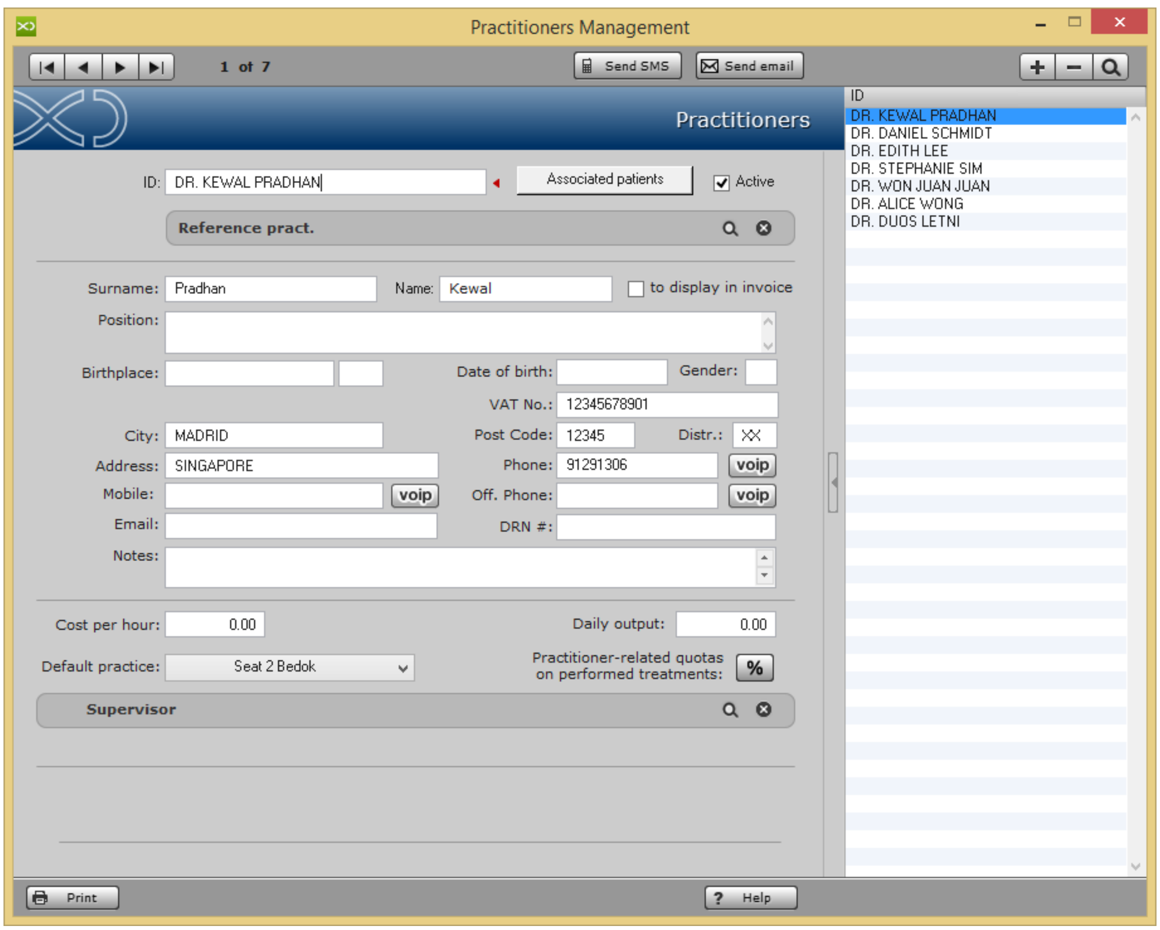
9. RESOURCES

9.1. Practitioners

How to set Clinic's Practitioners in XDent?

In XDent, Practitioners are the Dentists who perform the patient's treatment. The Active practitioner is shown in the menu bar (on the left) and all operations that require the association of a practitioner ID show the active practitioner by default. To change the active practitioner, click on the corresponding button on the menu bar, then select another practitioner in the list.

To Add/Edit/Delete the clinic's practitioners, go to Resources and select Practitioners.

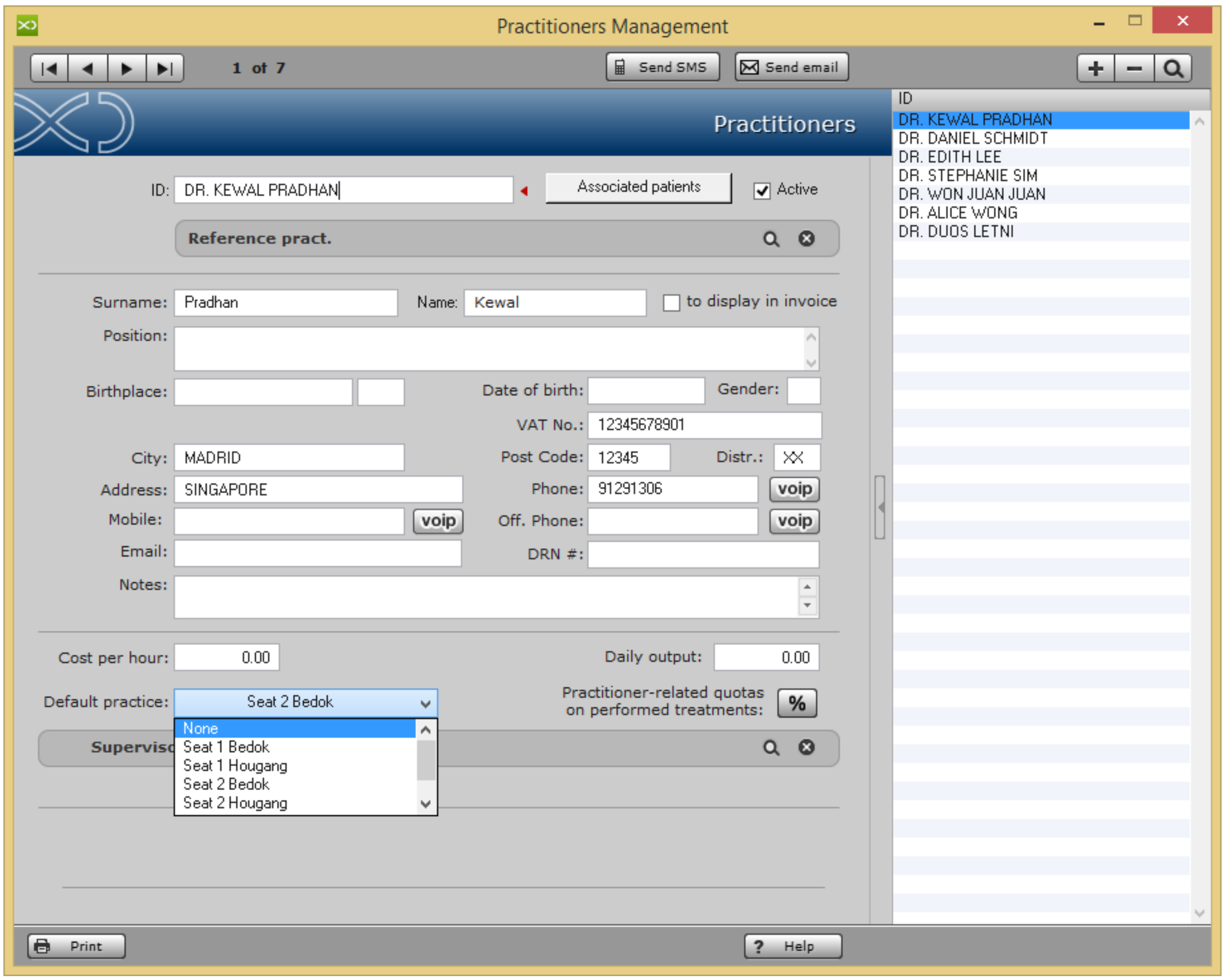


Note: The Clinic may add multiple Practitioners unless its license purchase contains restrictions on the setup permits.

How to set Default Practice for Practitioners in XDent?

For each practitioner, a default practice can be defined.

When an appointment is defined, XDent associates the default practice. A practice can be changed by using the menu in the Appointments window. If a practitioner has no default practice, then the practice room will be undefined when a new appointment is created.

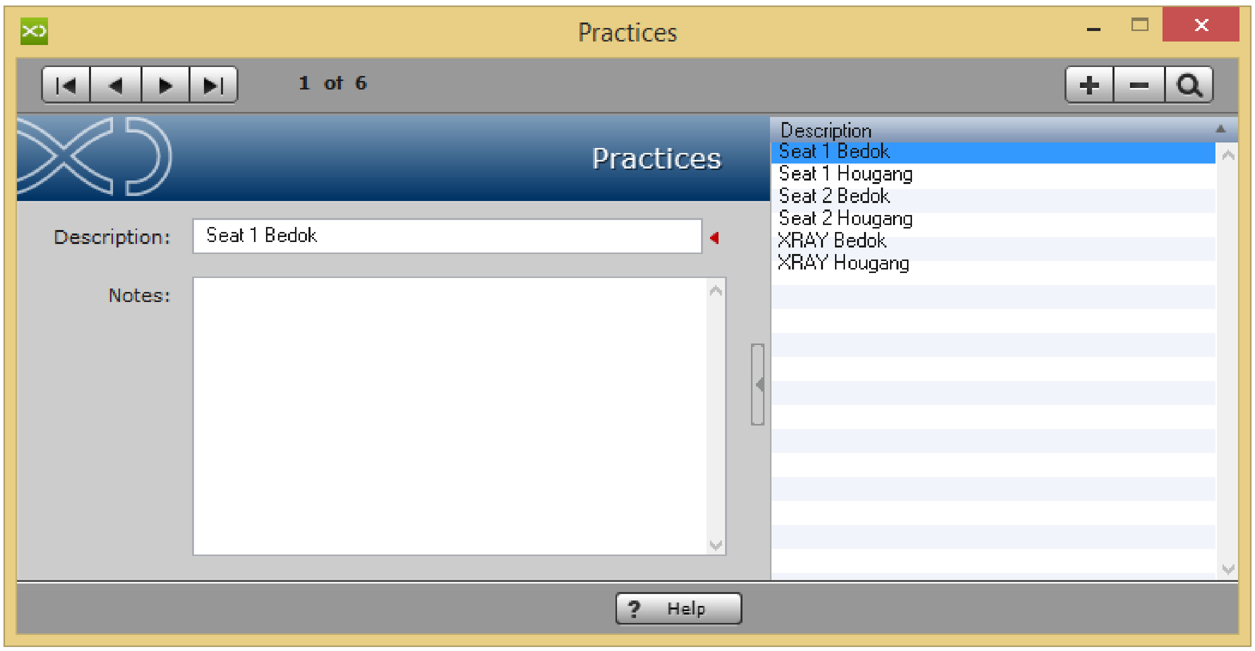


9.2. Practices

How to set Clinic's Practice in XDent?

Resources > Practices

In XDent, Practice refers to the Treatment Room, XRay or any other room that will be utilised by Practitioner and Patient.



10. TREATMENTS

Treatments carried out by the clinic can be fully customised. Different treatment lists, e.g. per practitioner, can be setup and for each list, a group of treatments can be defined.

Each treatment is identified by some information such as:

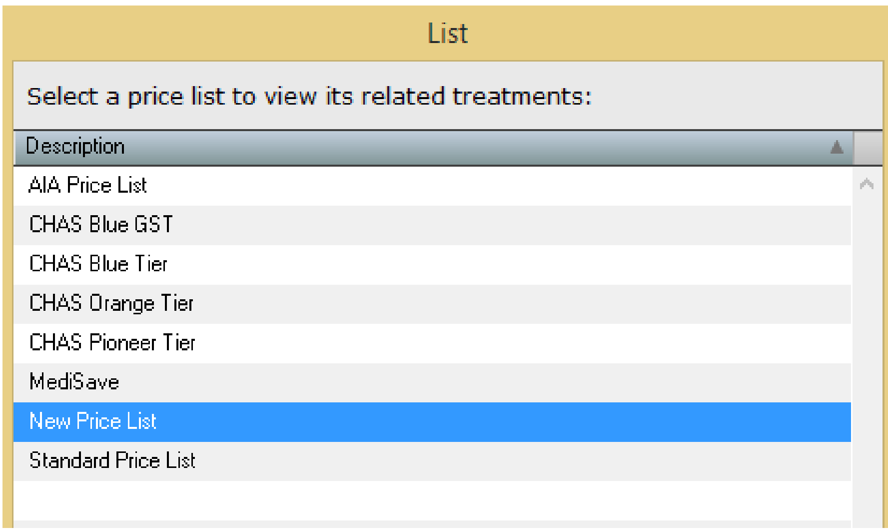
- A type, marked by a specific colour when a treatment is reserved (Diagnostic, Endodontic, General Dentistry, Oral Surgery, Periodontics, etc.)
- An order number, which allows a treatment-related sorting within a given type (irrespective of the alphabetical order)
- A symbol, which is included in the corresponding treatment in the dental chart. If the checkbox "show symbol in the dental chart" is not ticked, the corresponding treatment will not be shown in the treatment bar of the dental chart (it can be included in any treatment plan using the "Add treatment"); conversely, a treatment can be added to a patient's treatment plan by dragging the associated symbol, and superimposing the corresponding dental element showed in the dental chart.
- Using the checkbox “Account record”, the selected treatment can be inserted in accounting.

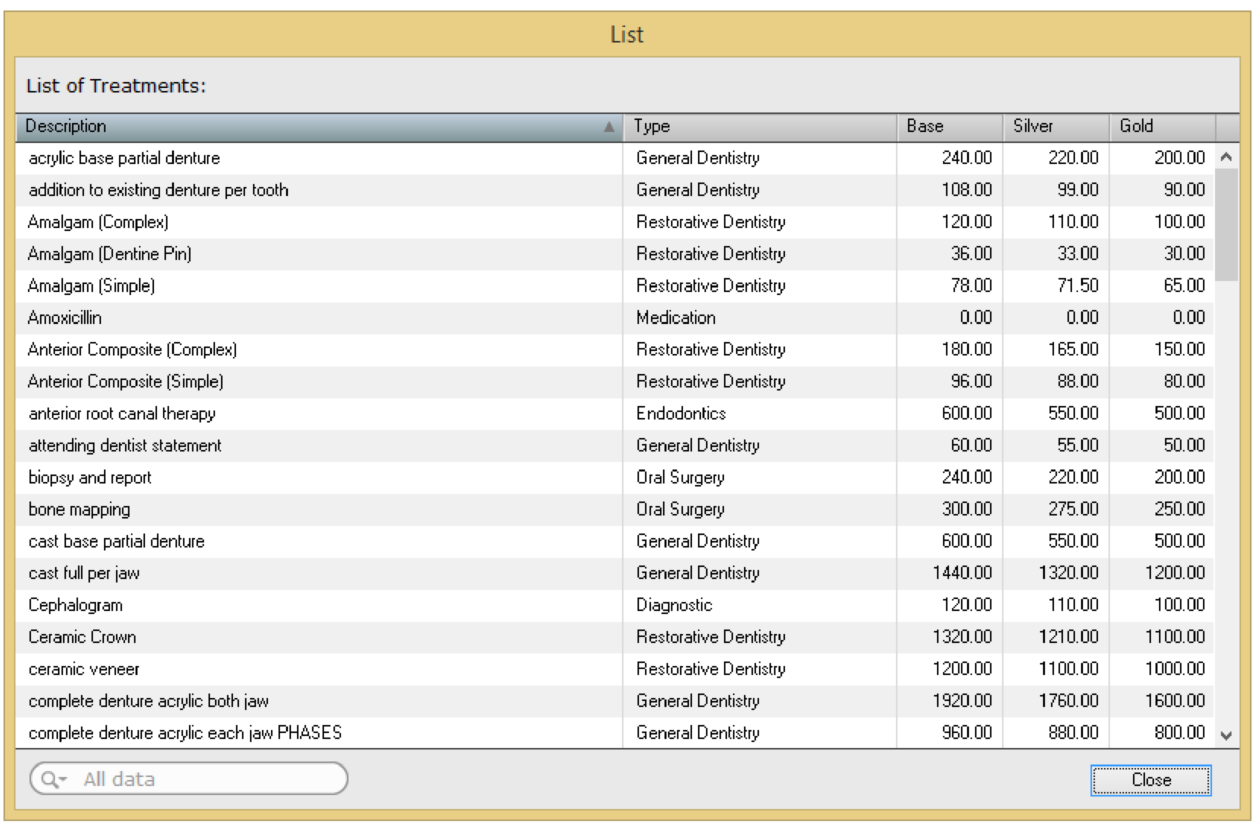
10.1. View Treatments

How to View Existing Treatment List with Price for Clinic in XDent?

Treatment > View Treatments

It will list all the treatment price lists that have been created or exist in the Clinic XDent. To add a new treatment price list (Refer #10.6)





Description	Type	Base	Silver	Gold
acrylic base partial denture	General Dentistry	240.00	220.00	200.00
addition to existing denture per tooth	General Dentistry	108.00	99.00	90.00
Amalgam (Complex)	Restorative Dentistry	120.00	110.00	100.00
Amalgam (Dentine Pin)	Restorative Dentistry	36.00	33.00	30.00
Amalgam (Simple)	Restorative Dentistry	78.00	71.50	65.00
Amoxicillin	Medication	0.00	0.00	0.00
Anterior Composite (Complex)	Restorative Dentistry	180.00	165.00	150.00
Anterior Composite (Simple)	Restorative Dentistry	96.00	88.00	80.00
anterior root canal therapy	Endodontics	600.00	550.00	500.00
attending dentist statement	General Dentistry	60.00	55.00	50.00
biopsy and report	Oral Surgery	240.00	220.00	200.00
bone mapping	Oral Surgery	300.00	275.00	250.00
cast base partial denture	General Dentistry	600.00	550.00	500.00
cast full per jaw	General Dentistry	1440.00	1320.00	1200.00
Cephalogram	Diagnostic	120.00	110.00	100.00
Ceramic Crown	Restorative Dentistry	1320.00	1210.00	1100.00
ceramic veneer	Restorative Dentistry	1200.00	1100.00	1000.00
complete denture acrylic both jaw	General Dentistry	1920.00	1760.00	1600.00
complete denture acrylic each jaw PHASES	General Dentistry	960.00	880.00	800.00

10.2. Treatment Management

How to Add/Edit/Delete Treatment for Price List in XDent?

Treatment > Treatments Management

The clinic can modify pre-set treatments and adapt them to their own rate, or create a new one. It can run any number of treatment lists and make changes to a treatment list.

When adding a new treatment, you should consider the following measures

Costs:

The treatment-related cost can be a total sum or the overall amount from four cost items: cost for disposable material, cost for specific material, cost for implants and practice-related cost. To define cost details open the detail tab.

Time:

Treatment time can have four different items: reorder point, execution time, communication time and time for any hindrance.

Default Treatment Notes:

This default note information will appear in Clinical Diary as Practitioners are able to create default treatment notes in the Treatment Price List. When a treatment status is changed from “to be Performed” to “In Progress” or “Performed”, the default treatment notes appear in a popup for confirmation or editing.

Step 1: Treatments > Treatment Management > Price List

Step 2: Add Default Treatment Notes

Prices:

There are three prices for any treatment: Initial price, Silver price and Gold price. Silver and Gold price can be calculated by reducing the initial price. In this way, a specific list can be determined with the corresponding reductions for each patient.

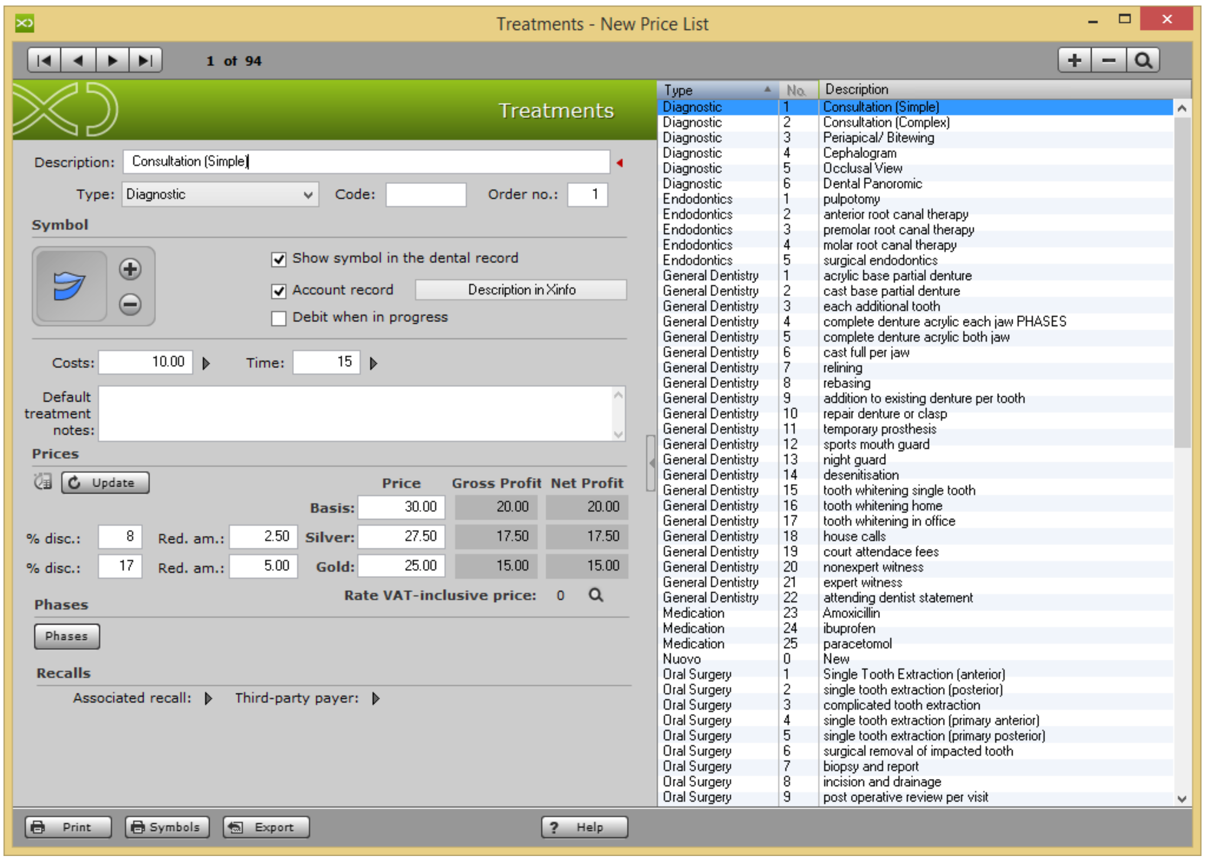
A recommended price for treatments can be determined according to four parameters: total cost, practitioner cost, profit margin and risk management.

- Total cost is defined in the treatment record
- Practitioner cost is defined in the practitioner record
- Profit margin and risk management are defined in the accounting record in Settings

Recall:
Recall to be associated with a treatment indicates the recall and the date in which a recall is automatically created when a treatment is carried out.

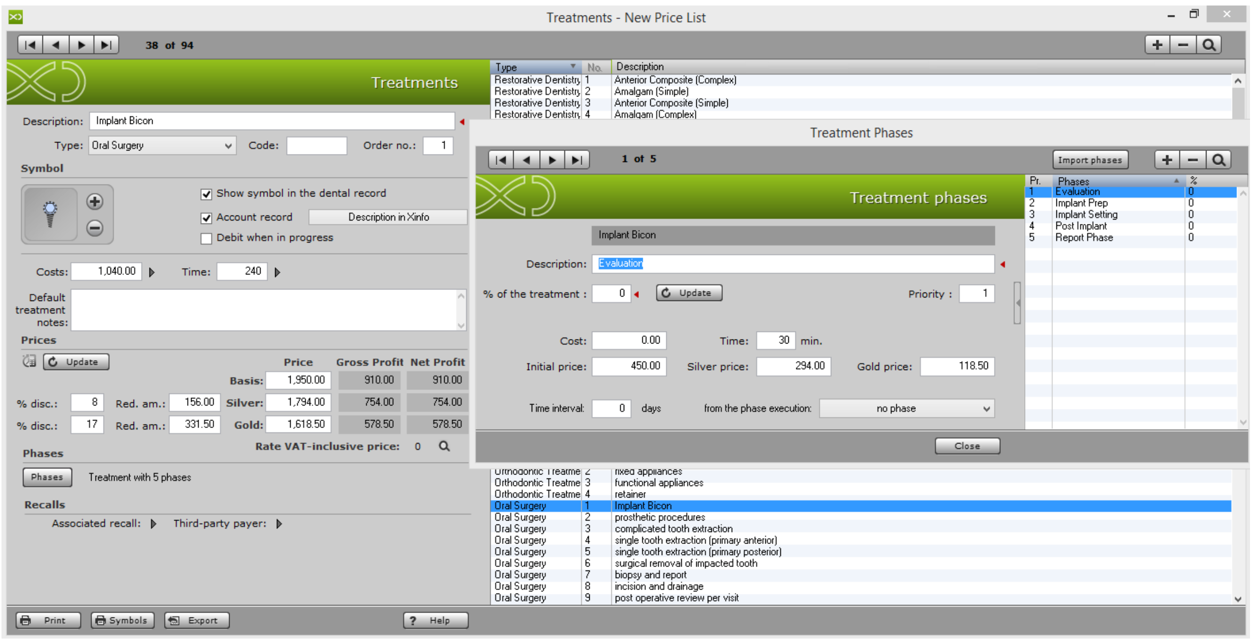
Third-Party Payer:
In the case of treatments of a third-party payer list, an additional section will be shown and the official name of a treatment as required by a third-party payer will be indicated, as well the payer's quota and its corresponding rate.

Symbols:
A symbol, which is included in the corresponding treatment in the dental chart. Each symbol can be associated with one or more treatments. To view the available symbols and the association treatments/symbols made, click on the Print symbols button.



How to Add Phases for the Treatment in XDent?

For each treatment, treatment phases can be defined and managed. Phase priorities of a treatment can be defined. Phase management allows treatments to be split into treatment phases, each one with its own cost and income.
By splitting treatments in different phases, a more detailed representation of practitioners' daily output can be done, as well as an accurate accounting statement of patients.

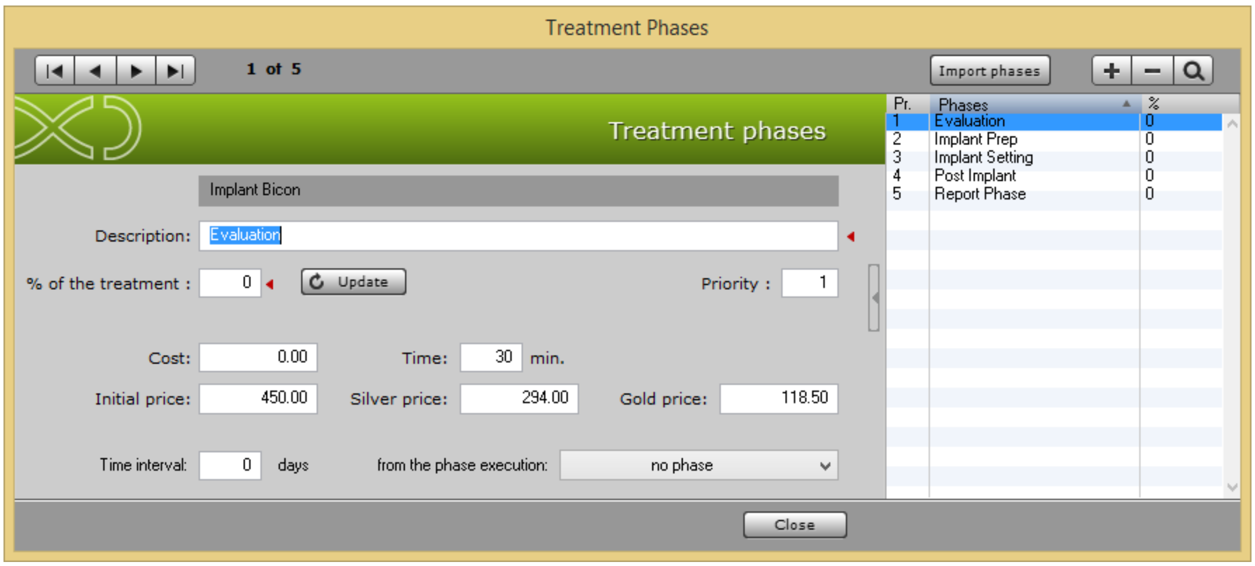


Setting phases
In order to set the treatments of the different lists, open treatment management. Each treatment record displays the button Phases through which each treatment can be associated with its corresponding phases.
You can set phases by manually entering each phase or importing the phases that have already been set for any other treatment. In this context, you can set the phase priority, the percentage of the treatment, the price (base, silver and gold) compared to the total price of the treatment, the cost and time scheduled for completing the phase.
Once the phases of a treatment have been set, these will be available for import to another treatment, by clicking the button “Import phases”.

Phases Timing

If there are several treatment phases, XDent allows you to not only set the phase priority, but also the timing of the phases. Users can specify if the execution of a phase is related to the execution of another phase and how much time - expressed in days – had elapsed between the two phases.

During the reservation of the scheduled phases, the system checks that priority-mode phases have been completed and calculates if the related time interval has elapsed. For example, this function can be very useful in situations where you know in advance the time required by the laboratory or any other external provider of services and/or products.



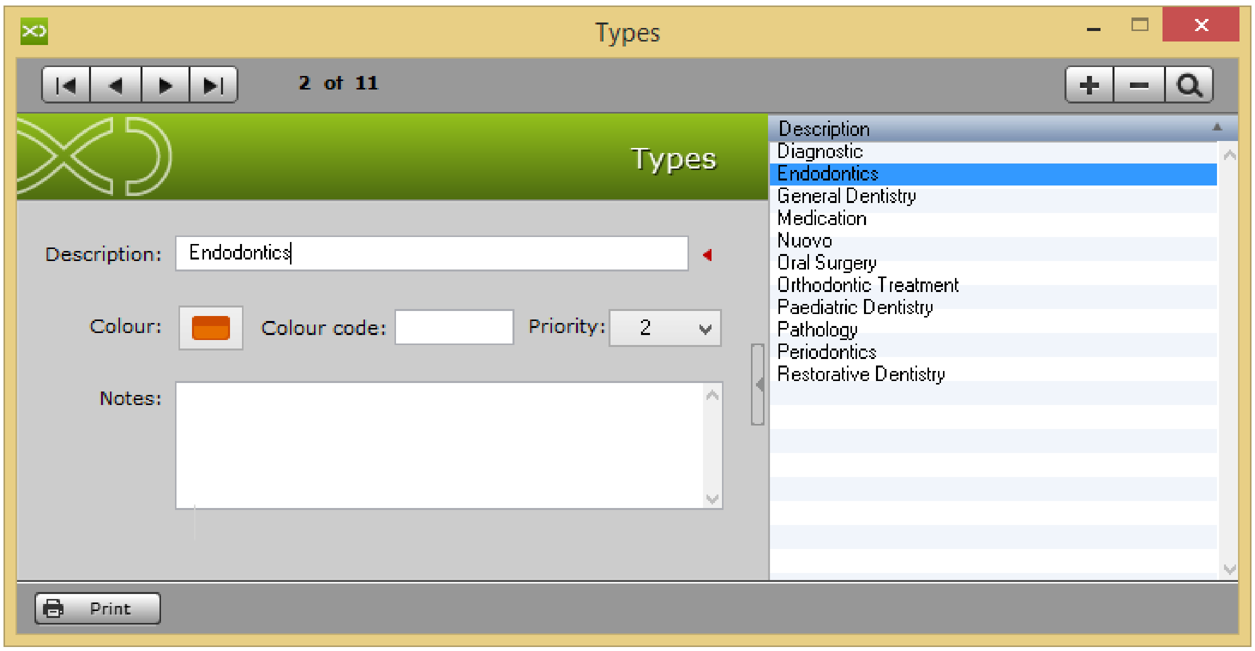
10.3. Types

How to Add/Edit/Delete Treatment Type in XDent?

Treatment > Types

The clinic can modify treatment type, set the priority marked by a specific colour to show in the Treatment List when a treatment is reserved (Diagnostic, Endodontic, General Dentistry, Oral Surgery, Periodontics, etc.) and also associate treatment to its type when creating treatment in Treatment Management.

(Refer #6.2)



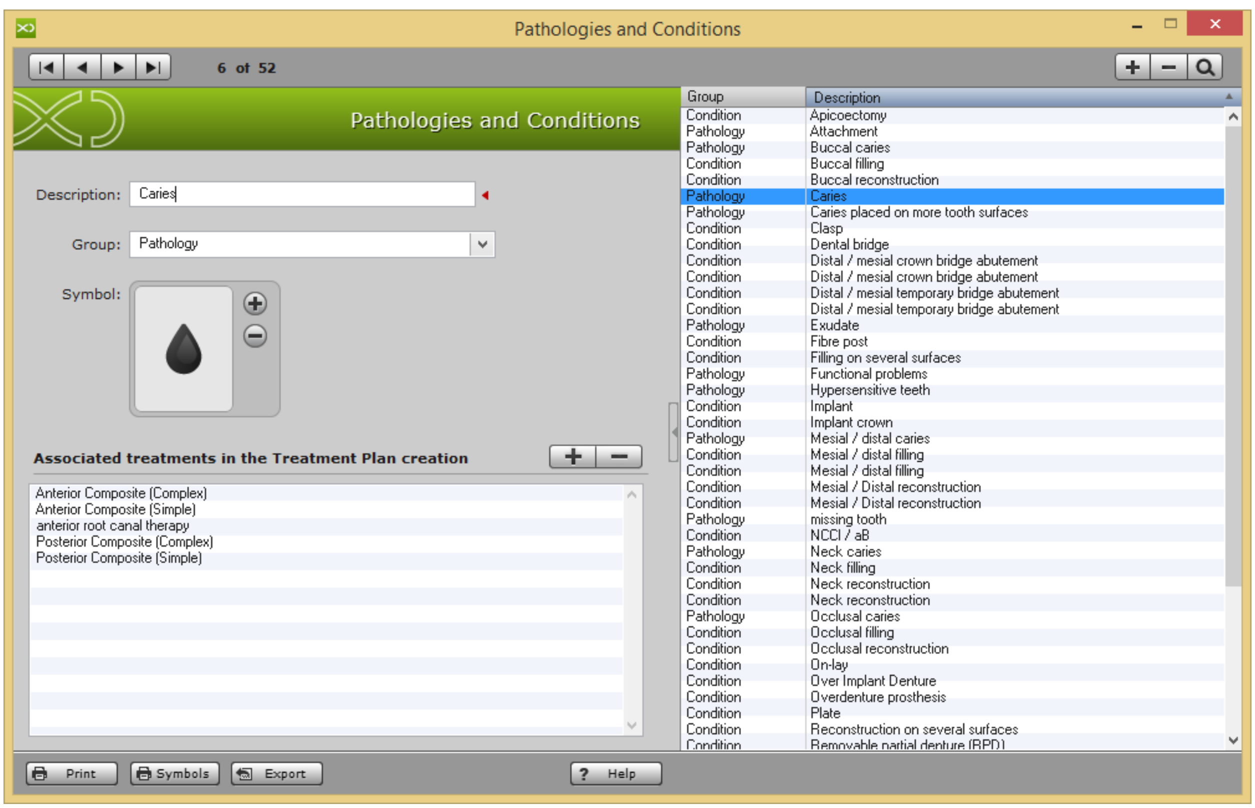
10.4. Pathologies and Conditions

How to create Pathologies and Conditions in XDent?

Treatment > Pathologies and Conditions
Click + to add a new pathologies and conditions, enter description and select group and select symbols from the list.

It allows you to manage a patient's pathologies which can be used when a physical examination is generated to describe the patient's initial state during his first practice visit. A graphic symbol can be associated to these pathologies; this can be drag&drop on the dental chart when the patient's physical examination is generated. In the same way, with drag & drop, treatments are added to the patient's treatment plan

For reference, you can print symbols and also export pathologies and conditions contained in HTML, Text and Excel format.
(Refer #6.3)

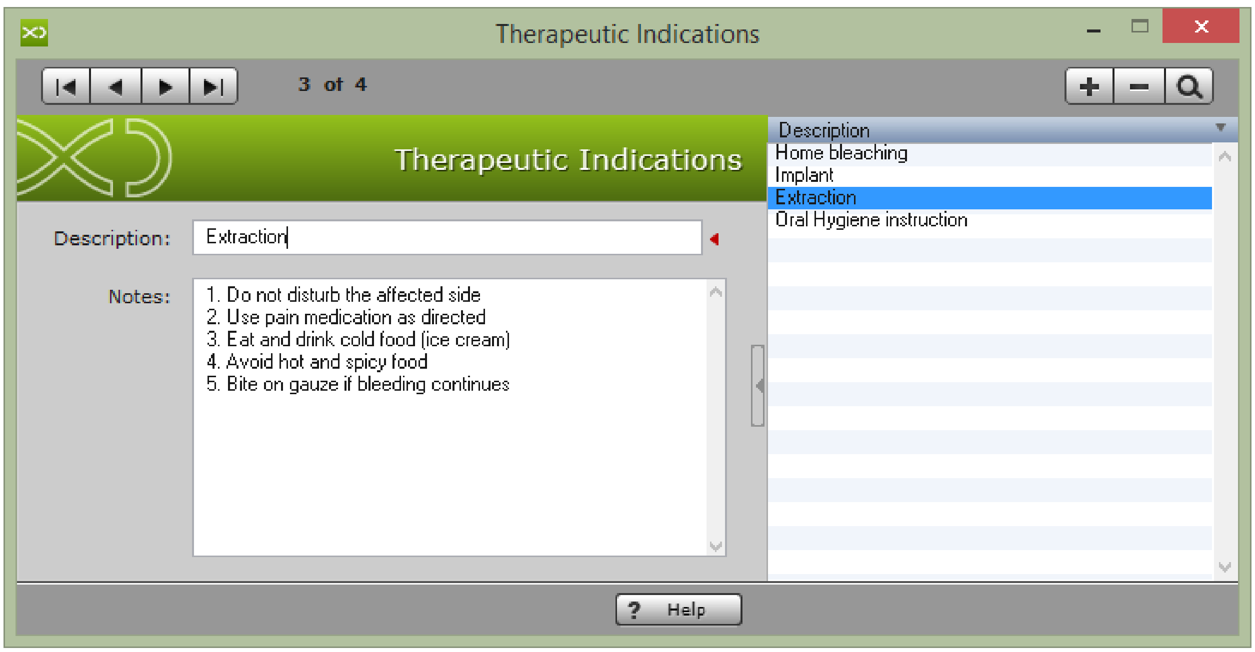


10.5. Therapeutic Indications

How to create Therapeutic Indications in XDent?

Treatment > therapeutic indications
Click + to add a new therapeutic indications, enter description and notes.

It allows you to manage therapeutic indications than can be used in the treatment plans. Therapeutic indications can be associated with each treatment plan by clicking on the editing button of the treatment indicated in the treatment plan record.
All the therapeutic indications assigned to a treatment plan are available for the patient through XInfo service.
(Refer #6.4)

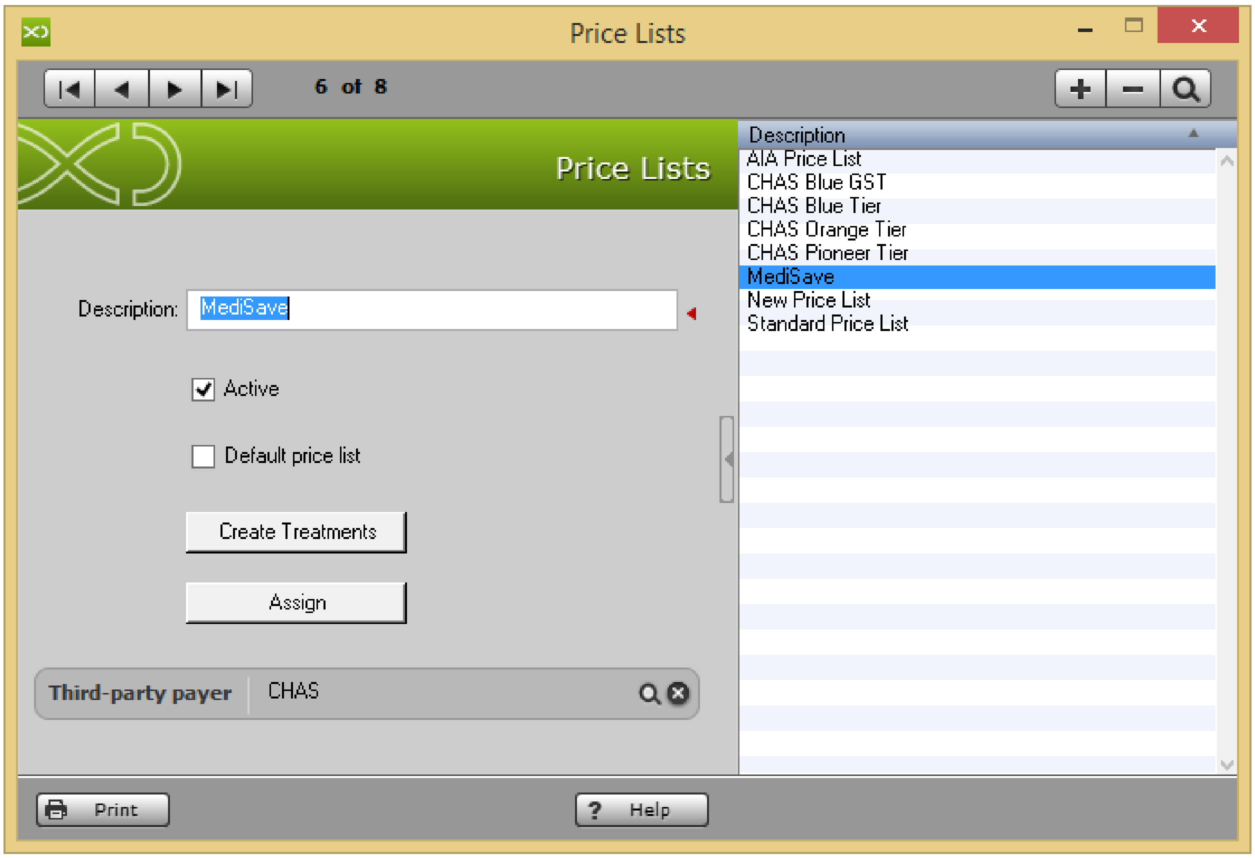


10.6. Price Lists

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

The clinic can modify the price list for the treatments and adapt them from existing lists by clicking “assign”; it will copy the treatment record from 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 to the Treatments and then Price list.



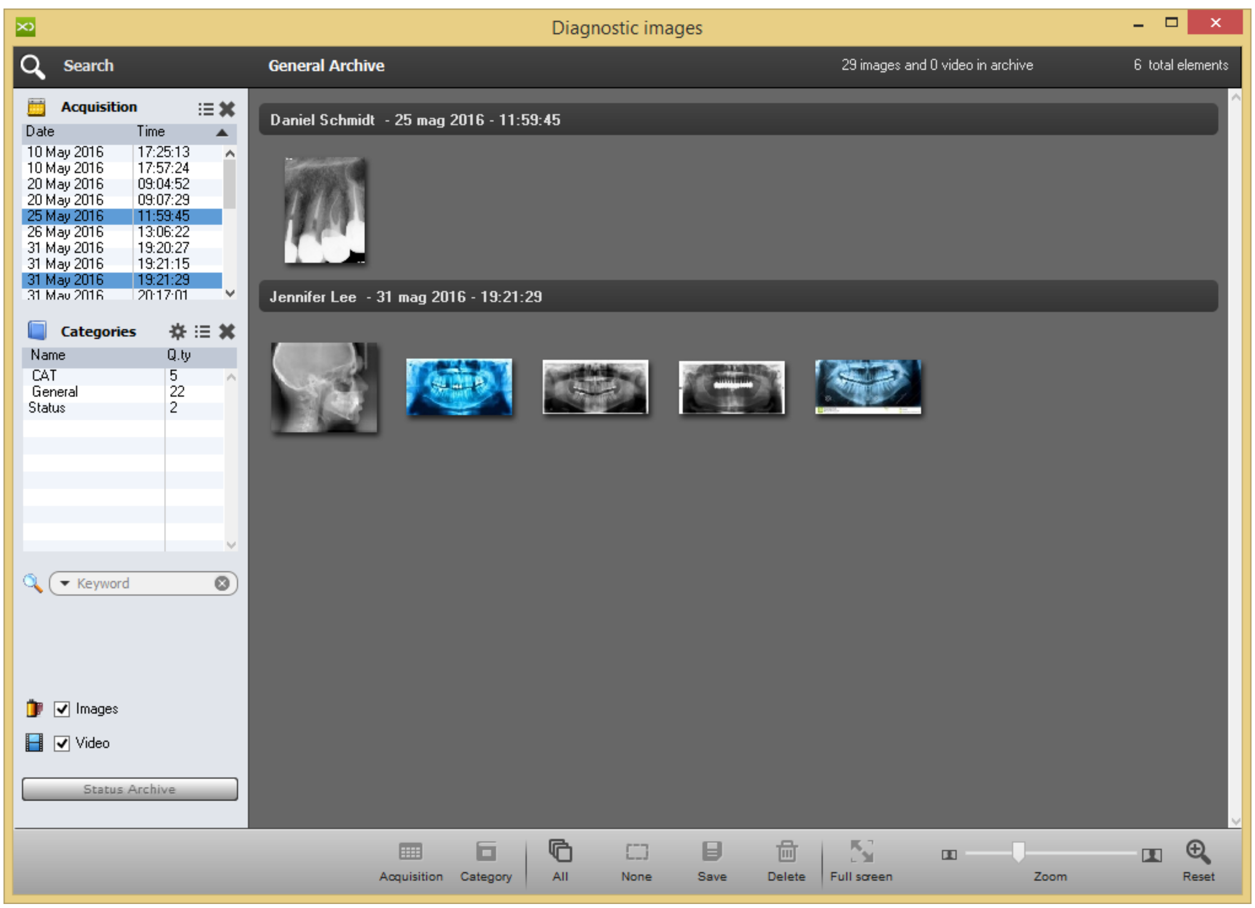
11. MULTIMEDIA

11.1. Multimedia Archive

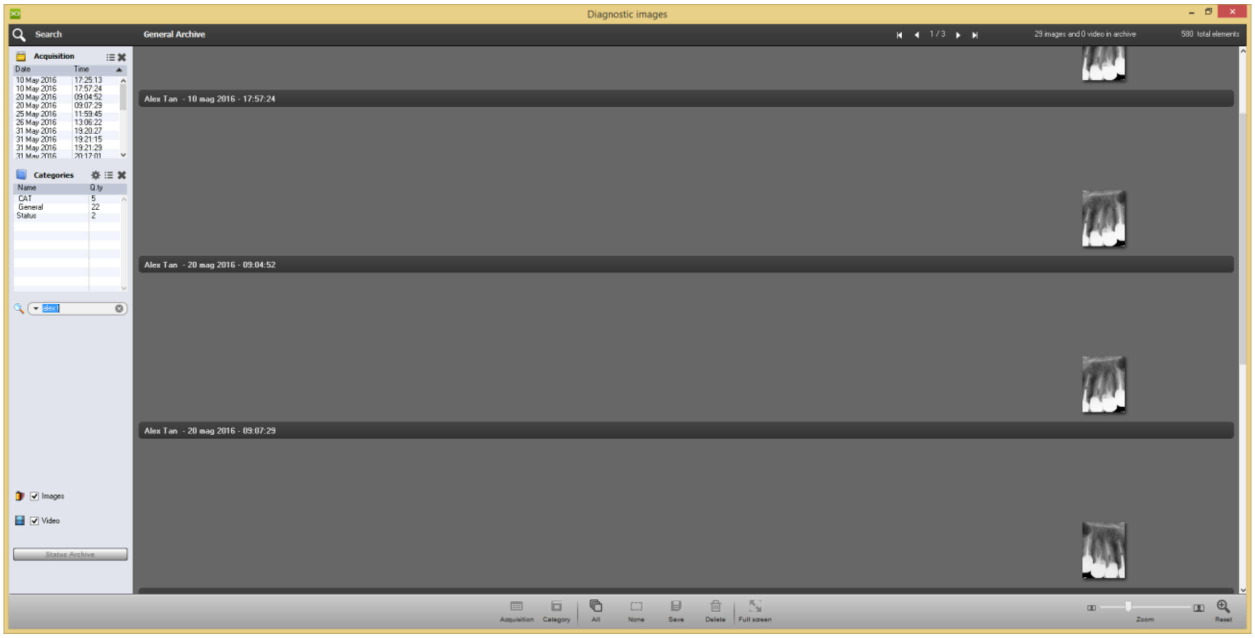
How to view Image and Video in General for all Patient in XDent?

XDENT multimedia archive can be globally and independently managed by each single patient. In the Multimedia menu, there is the entry Multimedia Archive by which the entire archive can be accessed.

On the left bar, all acquisition events are available. By selecting one or more acquisition events, thumbnails of stored multimedia items are displayed (pictures and/or videos). Each event is identified by patient name and acquisition date which define the event unambiguously. By clicking the event bar, each single event is selected thus displaying all thumbnails on the screen.



By the general management of the multimedia archive, all elements related to a patient can be searched by clicking the Search patient button placed top left of the management window.

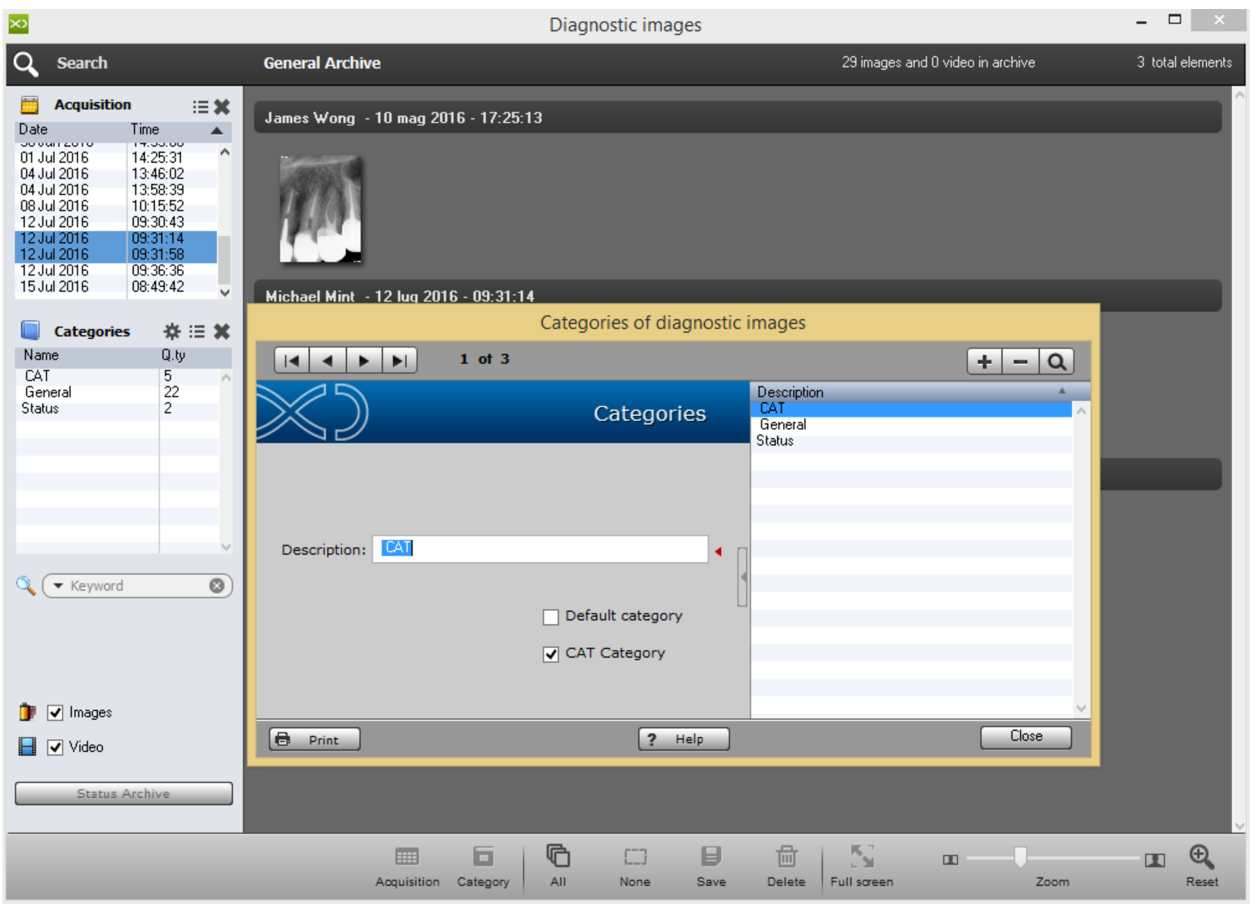


How to Add/Edit/Delete Image Category in XDent?

The medical imaging-related category can be managed and can be found under Image Categories.
The management of categories allows you to add, delete or edit the categories to be associated or already associated to the multimedia archive images. Via this management, all stored images can be classified, thus also quickly modifying the categories associated with the already stored images.
In the category management, there are two check boxes

- Default category
- CAT-related category

These two checks are used to define the default category for the images acquired by drag & drop and for the CAT scans imported via DICOMRx integration. Obviously, only one category in the archive can be defined as default category or as CAT-related category. The category assigned to the image or CAT can be modified after the import by the Category button of the management window in the multimedia archive.

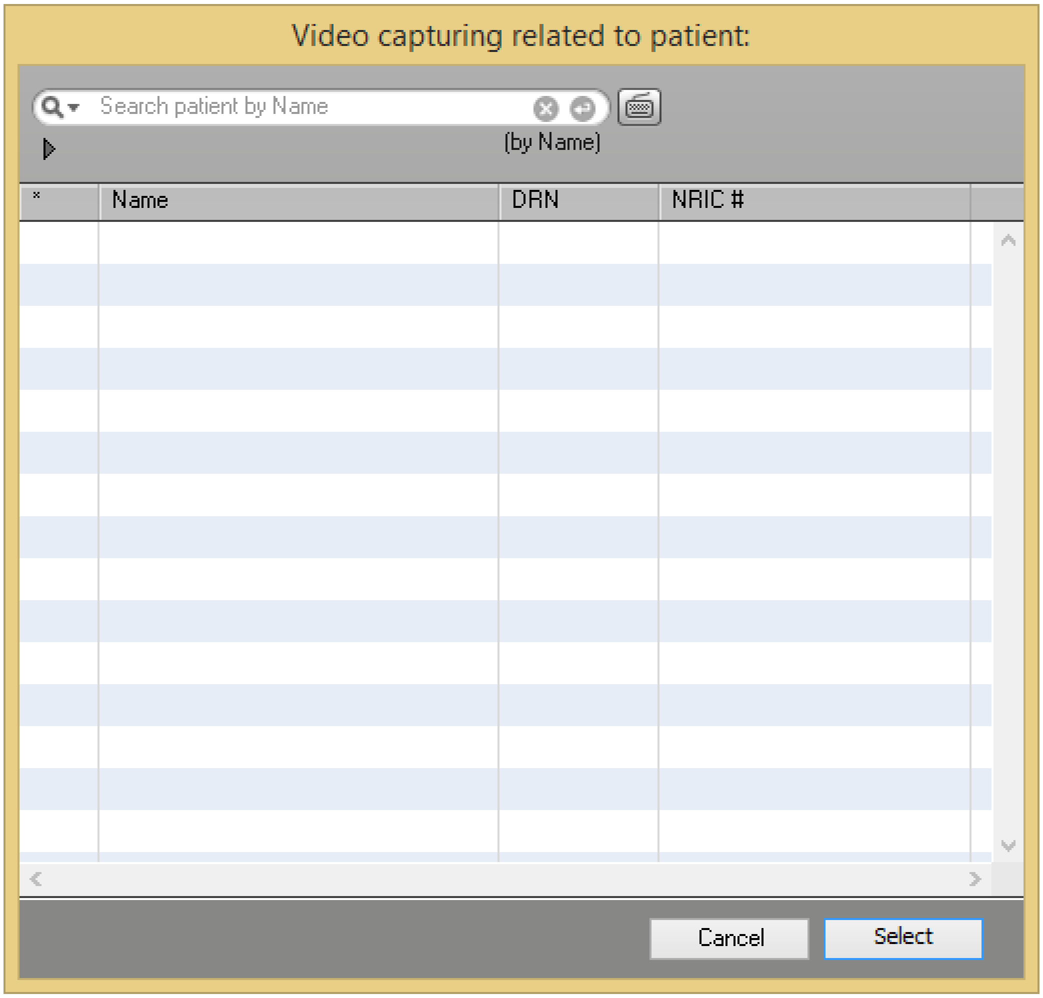


11.2. Video Capturing

How to Record Video for Patient in XDent?

The medical imaging-related category can be managed and can be found under Image Categories.

Quick Time Player

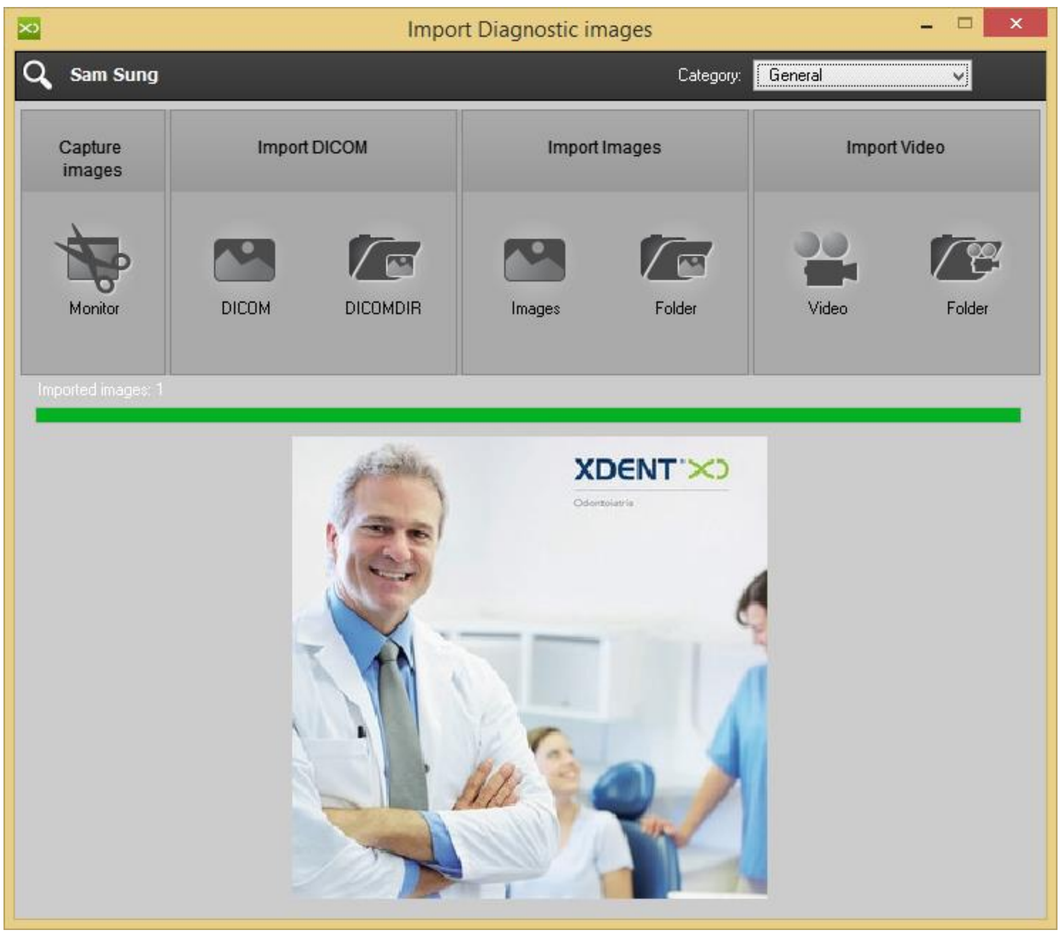


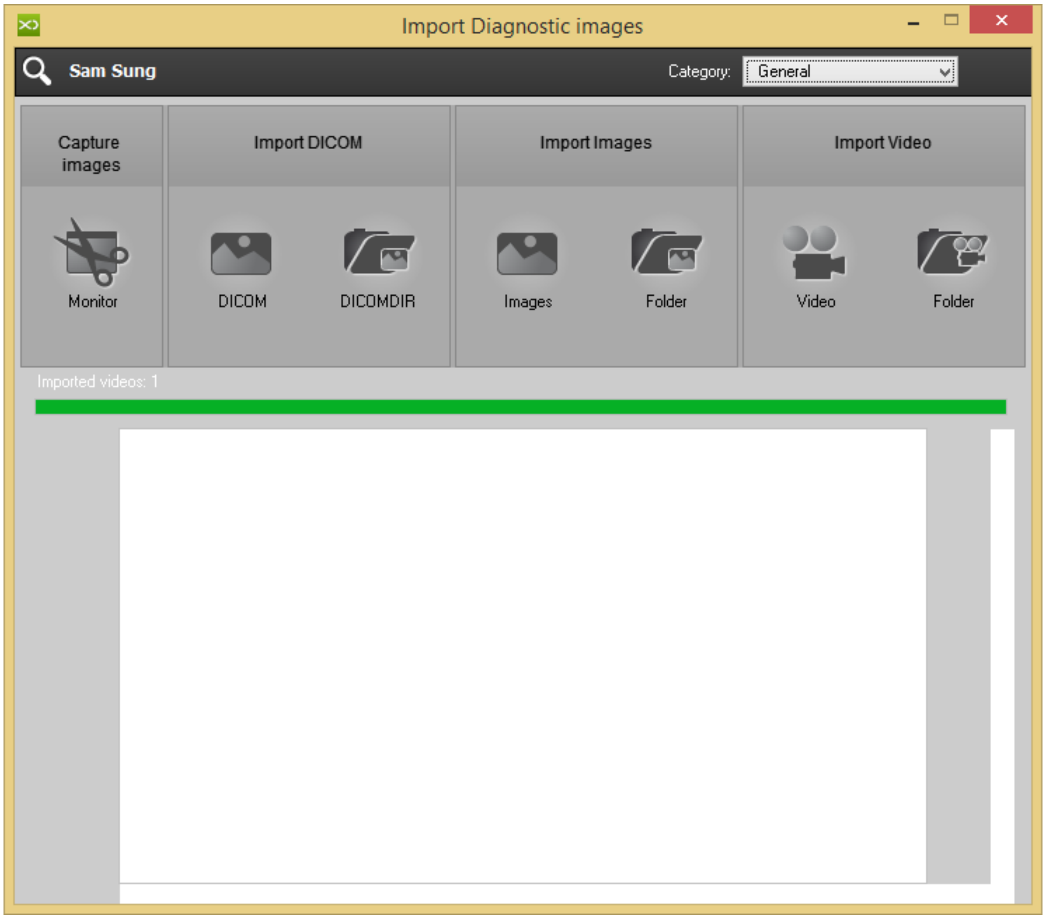
11.3. Import Images and Video

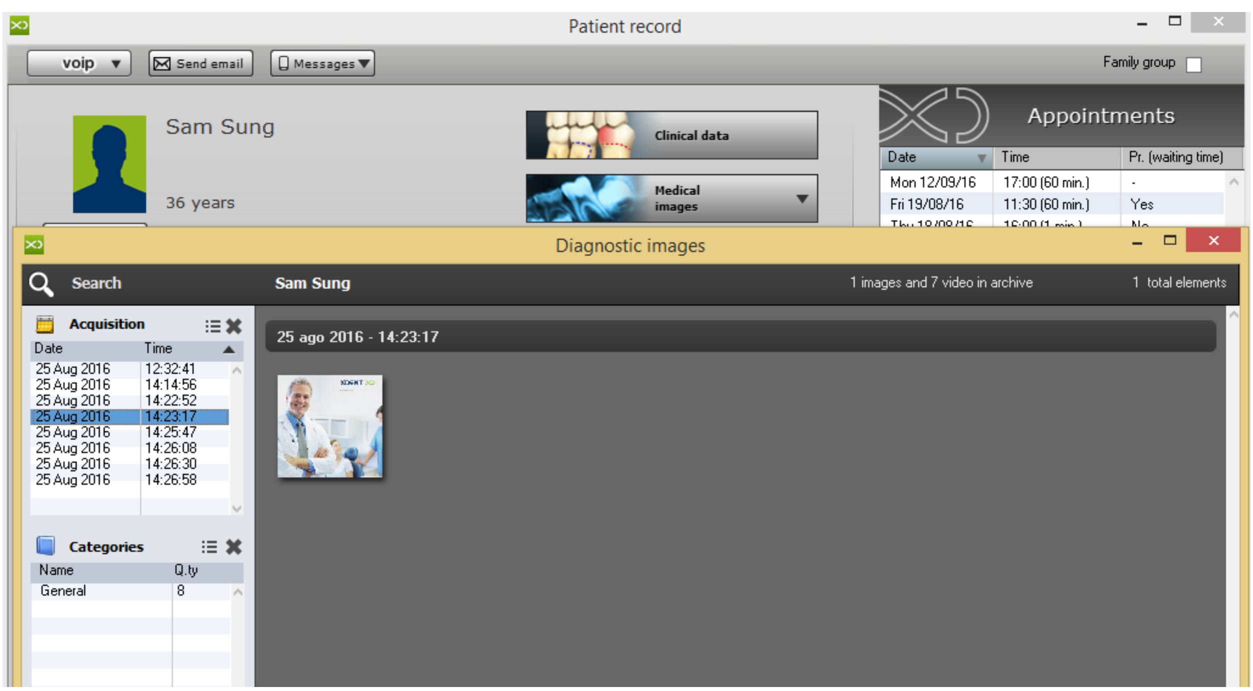
How to Import Images/Video/DICOM in a bulk for a Patient in XDent?

Multimedia > Import Images and Video
Images can be acquired individually or as a group (by selecting an image folder) either by Add or by the drag & drop function. Select the Patient to import the Images/Videos/DICOM, then upload as a single file or as a whole folder in a Category. After uploading, the file can be viewed from Patient Record > Medical Image.

The acquisition of the images in the case of group acquisition is in alphabetical order based on the file name. This is quite useful if the file name reflects the time order of the shots (as with digital cameras)
For more detail on Patient Multimedia Achieve (Refer #7.4)




Import Diagnostic images
Sam Sung
Category:
General
Capture images
Import DICOM
Import Images
Import Video
Monitor
DICOM
DICOMDIR
Images
Folder
Video
Folder
Imported videos: 1


Patient record
voip
Send email
Messages
Family group
Sam Sung
36 years
Clinical data
Medical images
Appointments
Date
Time
Pr. (waiting time)
Mon 12/09/16
17:00 (60 min.)
-
Fri 19/08/16
11:30 (60 min.)
Yes
Diagnostic images
Search
Sam Sung
1 images and 7 video in archive
1 total elements
Acquisition
Date
Time
25 Aug 2016 12:32:41
25 Aug 2016 14:14:56
25 Aug 2016 14:22:52
25 Aug 2016 14:23:17
25 Aug 2016 14:25:47
25 Aug 2016 14:26:08
25 Aug 2016 14:26:30
25 Aug 2016 14:26:58
25 ago 2016 - 14:23:17
Categories
Name
Q.ty
General
8

12. CRM

CRM Tool allows you to manage all the practice communications in a two-direction and controlled way. As with all modern systems to manage relationships with users (CRM), XDent has a control panel called Communication Centre that can be accessed to manage all inbound and outbound communications.

The CRM in XDent identifies with the Communication Centre that can be accessed from the Operations menu or by the main bar of XDENT.
Via the Communication Centre, the following items can be checked and managed:

- Communications with patients in different ways (SMS, letter, e-mail and notification)
- Multiple communications to be sent to patients
- Management of news to post on XInfo
- Notifications received via XInfo

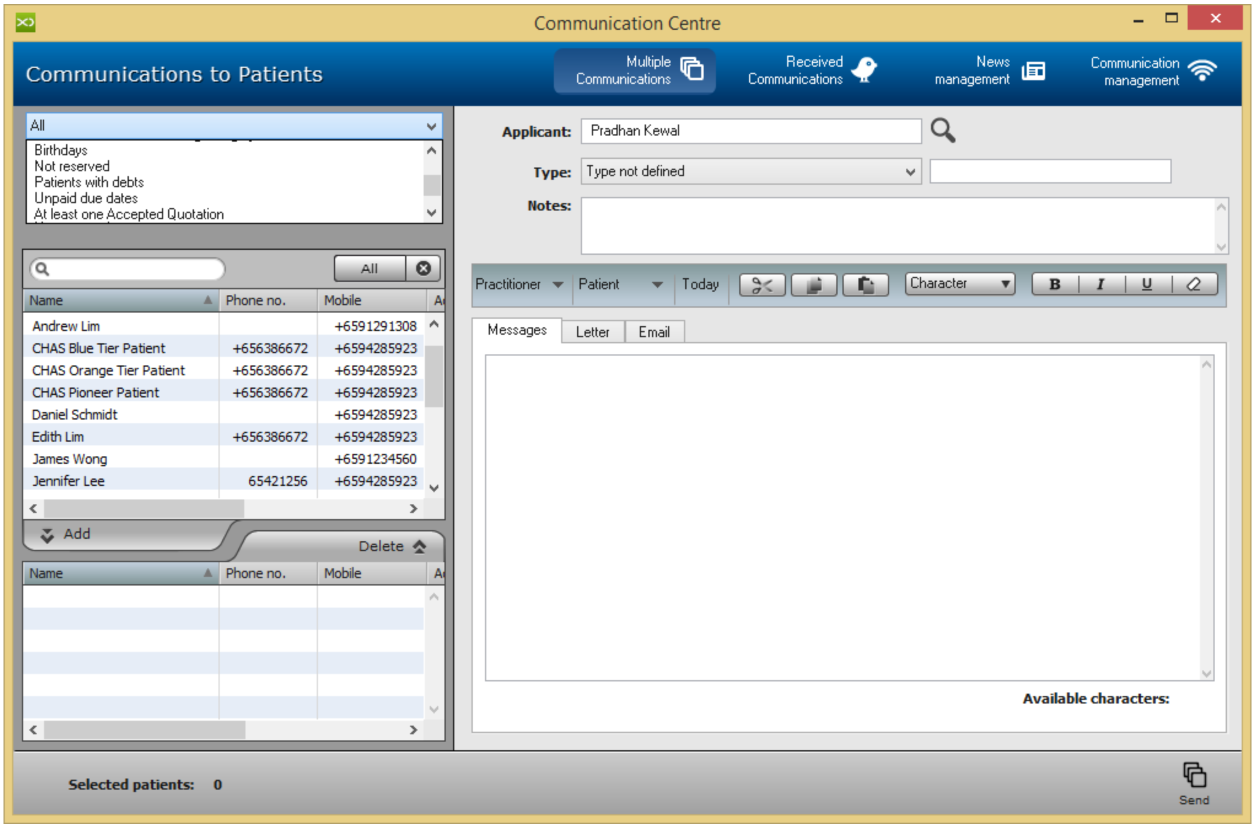
Among the communications, there will be the recalls automatically generated by the system after a treatment as well as the recalls of appointments sent via SMS or notifications resulting from the daily and weekly scheduling.

12.1. Multiple Communication

How to Manage Multiple Communication for a Patient in XDent?

Communication Centre > Multiple Communication

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



Patient preselection criteria:

- All Patients
- All Active Patients
- All Inactive Patients
- All Patients with special categories (select the desired category)
- Patients whose birthday is on the specified day
- Patients with no reservation
- Patients with debts
- Unpaid due dates
- Patients with at least one Accepted Quotation
- Patients with no Accepted quotations
- Patients with Undone Treatments on missed appointments

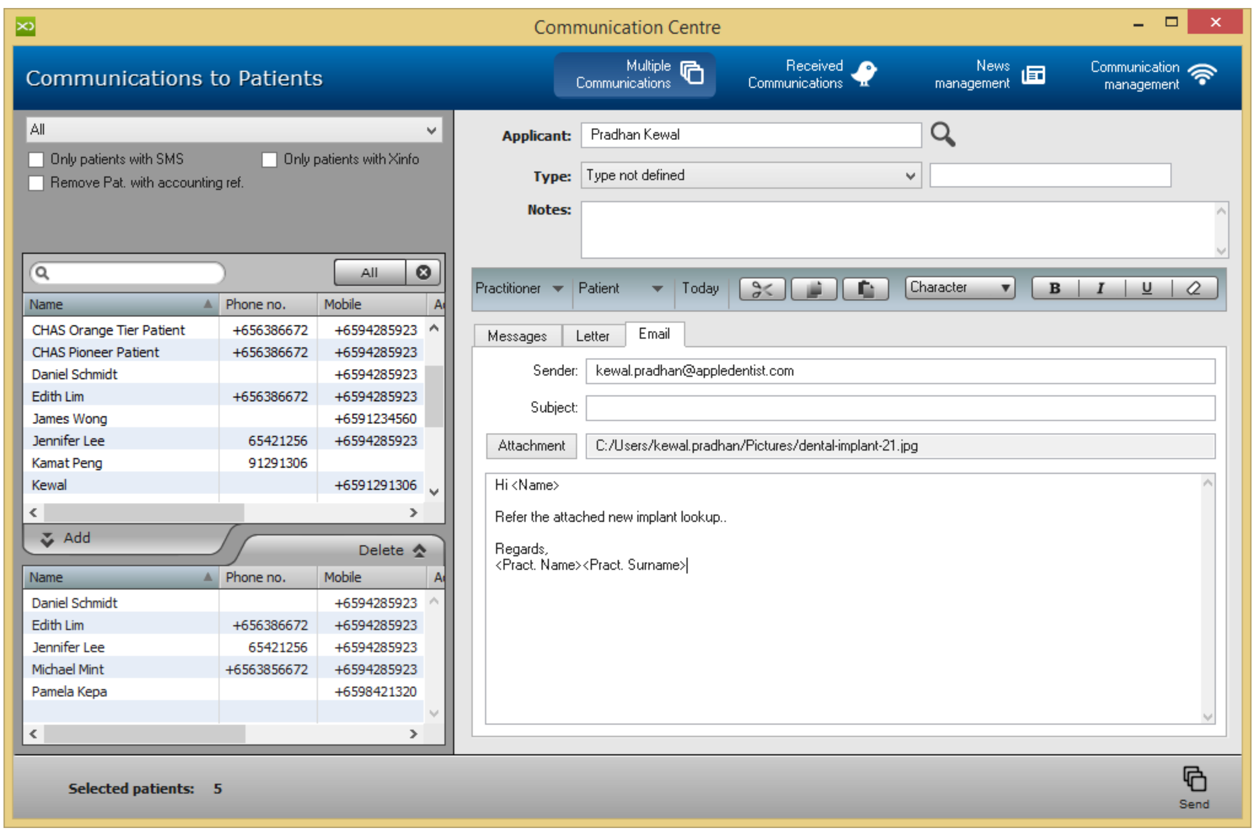
Once a group of patients meeting one of the above search conditions is identified, this selection can be further restricted. Selection can be made from the list and from Add button.

On the right side of the window, the type and mode of communication can be selected which can be extracted from the communication archive and pre-selected by the drop-down menu with the Type tag.

The communication can occur in different ways:

- Messages: used to send SMS and Notifications
- Letter: used to print letters
- Email: used to send e-mails

The send mode can be chosen to forward the communication to the selected users and selecting the send mode notification. By writing the text of the message, the communication can be sent via the notification system. In this way, the user will receive the notification with the message directly on his/her own mobile device, even when the XInfo app is off.



12.2. Received Notifications

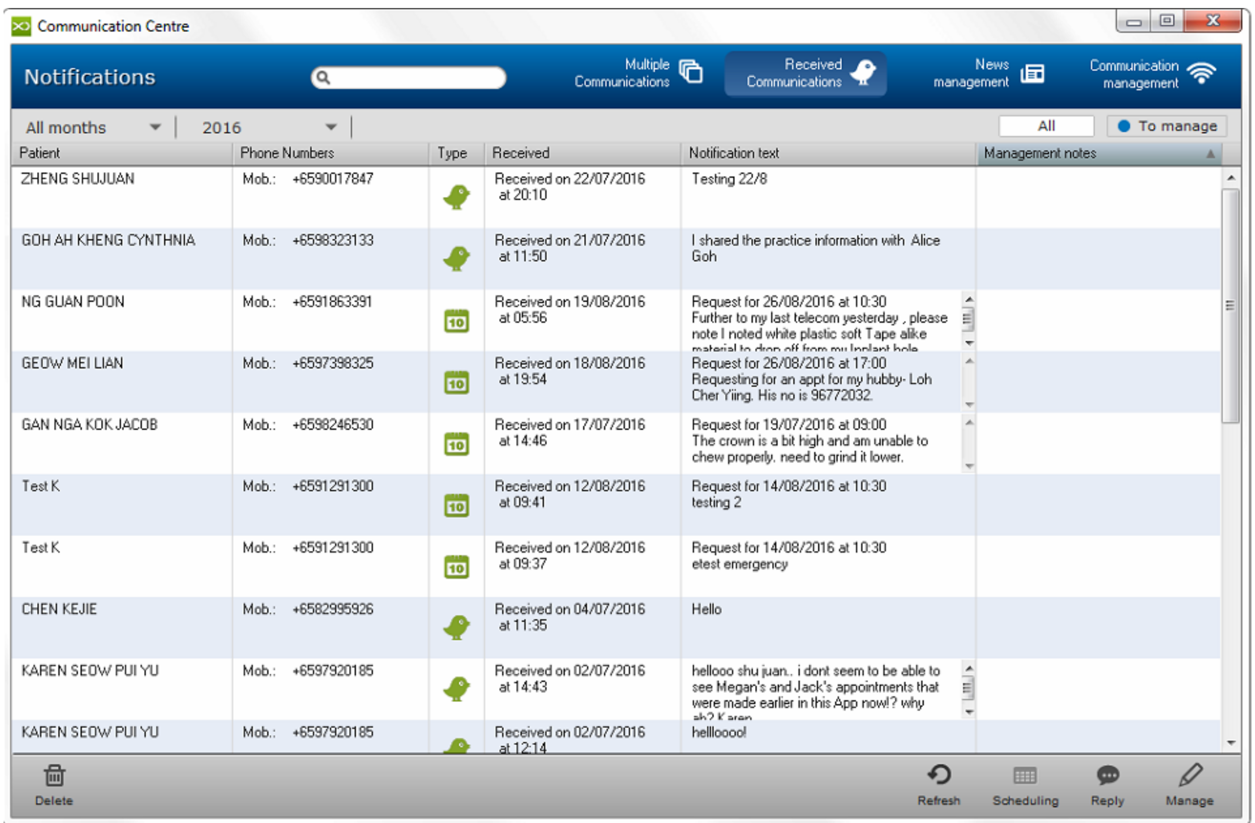
How to Manage Received Notification in XDent via XInfo User?

Communication Centre > Received Communication
Receiving a notification function of XInfo service. Patients enabled to the service can use this method of communication with Smartphones.

Via XInfo, patients will be able to send two types of notifications to the Practice:

- Patient/Practice communication notifications
- Appointment requests

The Patient/Practice communication notifications are sent by the patients through the Contacts section in the XInfo app.



Patients can write the text of the communication to be sent to the practice via XInfo. The notification will be then displayed in XDent under the "notifications received" window together with date, time, and name and telephone number of the patient. The appointment request notifications are instead sent from the XInfo

appointment section. The patient will enter the date and time of the desired appointment and will add any further notes.
When XDent receives a notification sent via XInfo, an alert badge is shown on the menu bar of XDent with the number of notifications received and not yet managed.

The following operations are available for each notification:

- Management by clicking manage
- Answer by clicking reply
- Appointment by clicking scheduling

By selecting the notification and by clicking the manage button, the notification can be ticked as managed and notes can be added. By selecting the notification and by clicking the reply button, an answer can be sent to the patient by just writing a message that will be received as a notification. By selecting an appointment request-type notification, the scheduling of the specific day as well as the reply or management function can be opened with the scheduling button.

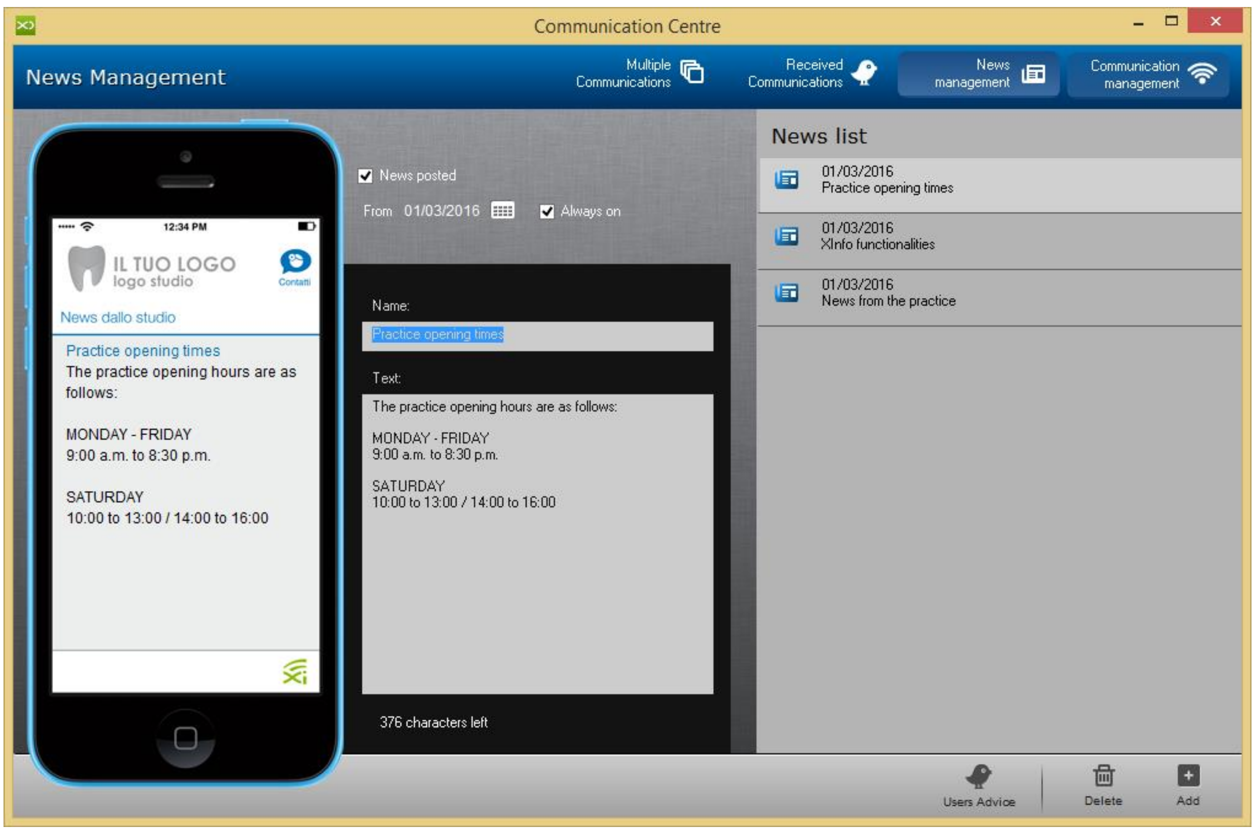
12.3. News Management

How to Manage Clinic News in XDent for XInfo User?

Communication Centre > News Management
All practice News can be managed. The News Management is implemented inside the XInfo service and allows you to deliver all news that the Clinic wants to communicate to the enabled patients. Each news notification is sent to all enabled patients that have XInfo on their Smartphone.

The Clinic can add new News by clicking the button “add”. Each News is identified by a title or a text and news can be written and published on the XInfo platform only when desired by clicking the checkbox “Published news”.

The publication dates of the news can also be scheduled by setting the desired period or by setting the News activation date and then selecting “always on” so to leave the news published for an indefinite period of time.



12.4. Communications

How to Manage Follow up Communication in XDent for XInfo User?

Communication Centre > News Management
When a new Communication Centre is opened, all inbound and outbound communications managed by the office are shown for a desired time range.

Among the communications, there will be the recalls automatically generated by the system after a treatment as well as the recalls of appointments sent via SMS or notifications resulting from the daily and weekly scheduling.

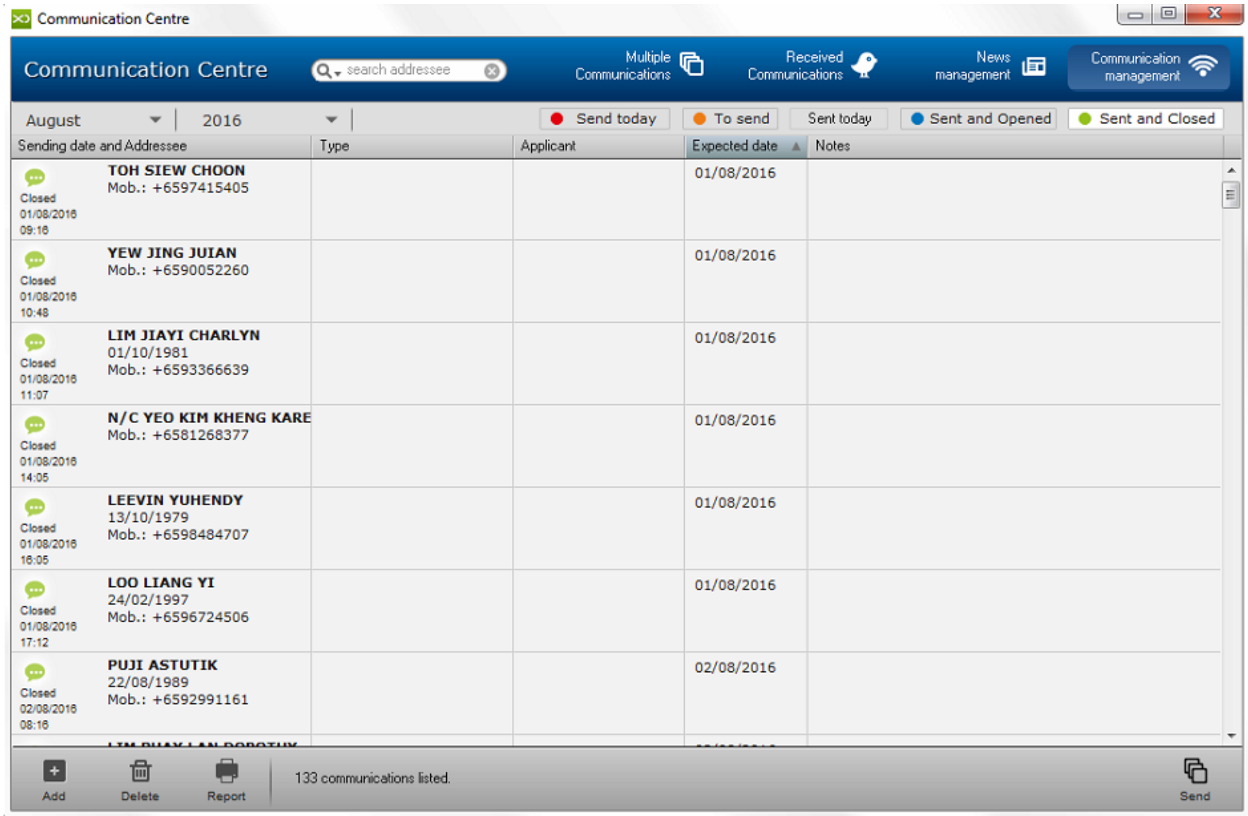
The send modes for each communication are the following:

- Letters: prints the communication
- E-mail: sends the communication by e-mail
- SMS: sends the communication by SMS
- Notification: sends the communication by the XInfo service if the practice is enabled and if the patient has enabled the service

The communications to be sent have to be selected and the send mode icon pushed. Once the communication has been sent, a management window will appear in which notes can be added to the communication and the following options selected: close communication, leave open (and optionally the reason why) or reschedule the communication to a specific date.

Eventually, the communication status can be the following ones:

- To be sent (no communication)
- Finished (communication finished)
- Open (communication to be managed as not finished)



Note: The SMS service is widely used, it lets you send a communication via SMS to the patient's number cell. XInfo, the patient App available will save you costs for SMS as messages are directly sent to the patients App at no charge.

13. DOCUMENTS

Documents Module allow to manage documents and Clinic can create own template in MS Word, Open Office or in XDent default template.

Form Library variable are available to auto select the field from the XDent Database.

Patients	Operator	Third Payer	Documents
Name	Surname Op.	Third Payer header	Date
Last name	Name Op.	Third Payer address	Payment
Common Birth	Qualification Op.	CAP-Common-Prov. Third Payer	Quote Number
Place of Birth	Address Op.		Dental Scheme
Date of birth	Op phones.		Amount Granted
Gender	Email Op.		Quotation
Tax code	Fiscal Data Op.		Franchise
Residential address	Operator		Location
Shared Residence			Title prev.
Capital Residence			Total Document
Province Residence			Total Patient
Phone (House)			Total Performance
Phone (Mobile)			Total Discounts
Phone (Office)			
E-mail			
Various			
Barcode			
Title			
Commercial Reference			
Medical Reference			
Complete Phrase			

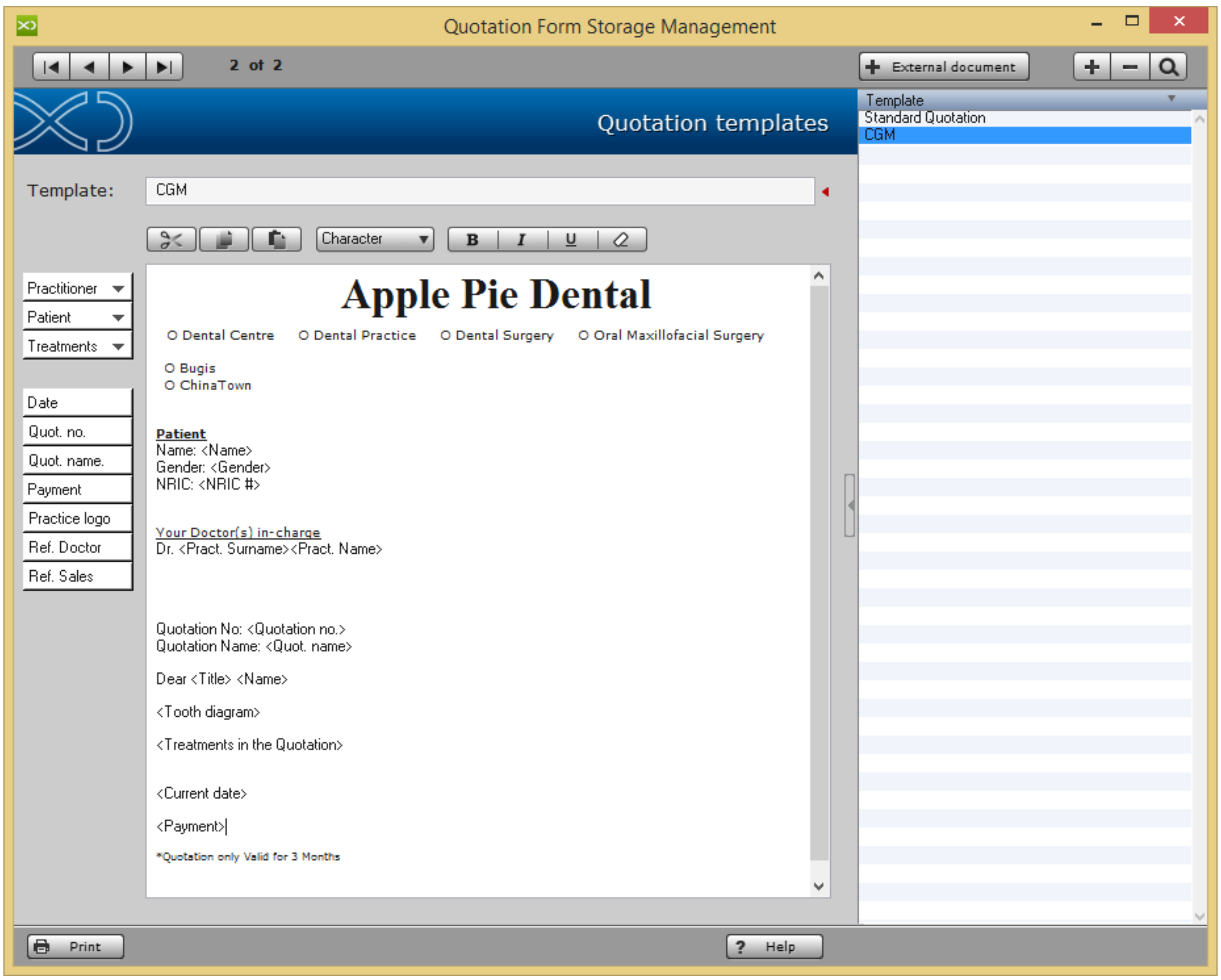
More info on How to create Form can be found in
Quick Reference Guide - Create Form (MS WORD_v2 and OPEN OFFICE_v2)

13.1. Quotation Forms

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.



To refer on how to issue the Quotation (Refer #7.1.7)

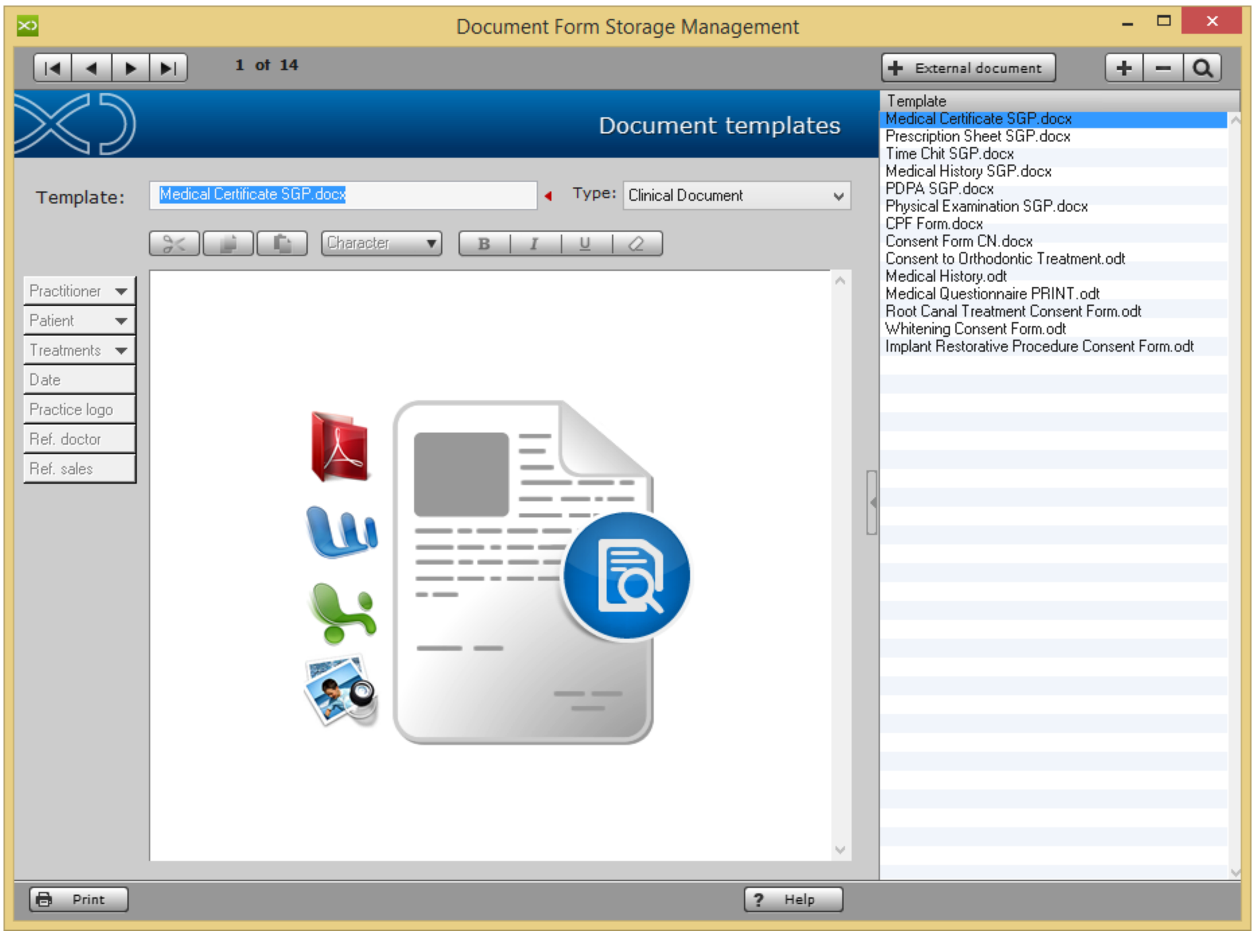
13.2. Document Forms

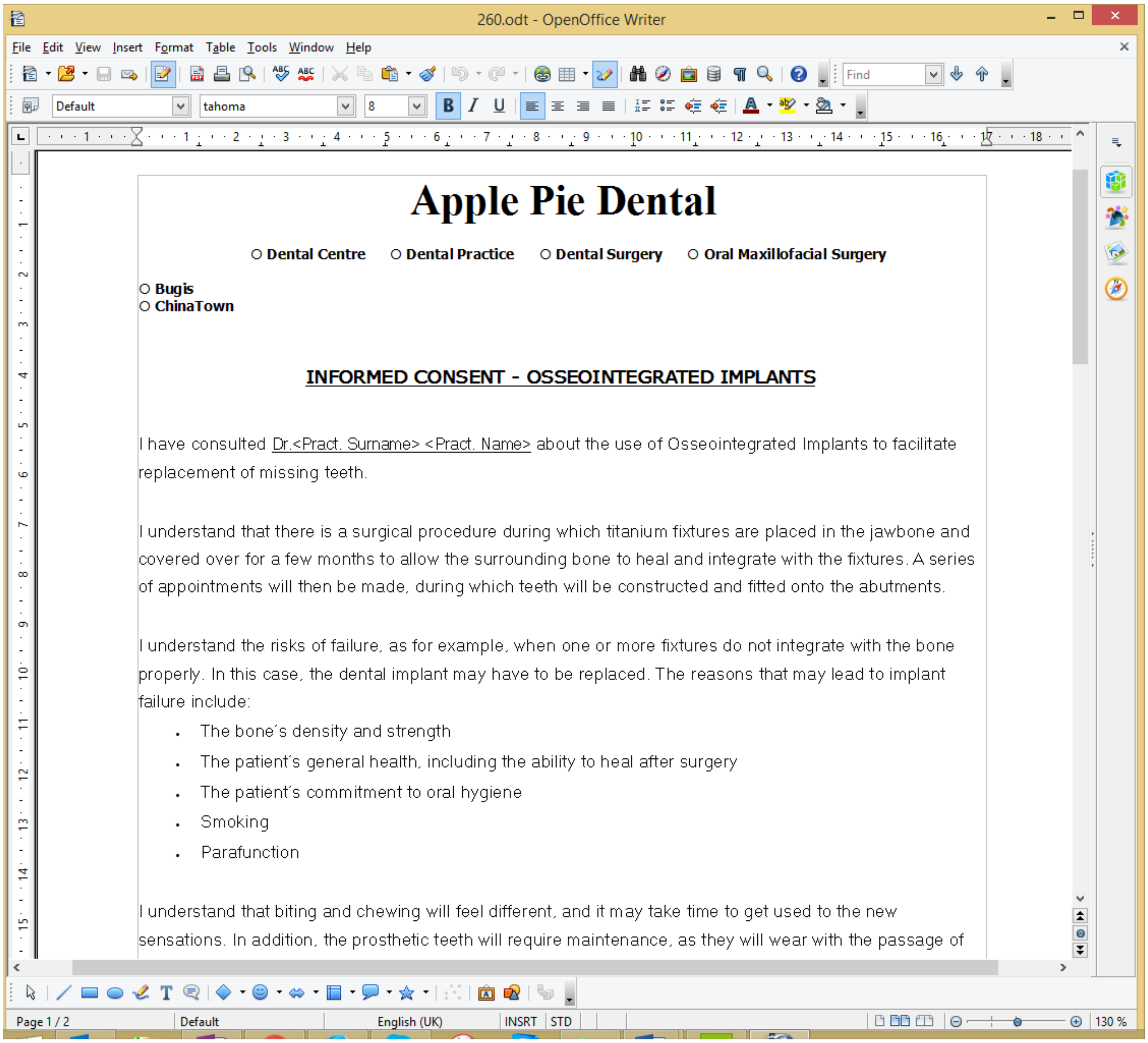
How to Create/Add/Edit/Delete Document Form in XDent?

Documents > Document Form

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

Document Form will consist all the form related to Patient like Content form, Time Chit, PDPA content, etc..





Apple Pie Dental

○ Dental Centre ○ Dental Practice ○ Dental Surgery ○ Oral Maxillofacial Surgery

○ Bugis
○ ChinaTown

INFORMED CONSENT - OSSEOINTEGRATED IMPLANTS

I have consulted Dr.<Pract. Surname> <Pract. Name> about the use of Osseointegrated Implants to facilitate replacement of missing teeth.

I understand that there is a surgical procedure during which titanium fixtures are placed in the jawbone and covered over for a few months to allow the surrounding bone to heal and integrate with the fixtures. A series of appointments will then be made, during which teeth will be constructed and fitted onto the abutments.

I understand the risks of failure, as for example, when one or more fixtures do not integrate with the bone properly. In this case, the dental implant may have to be replaced. The reasons that may lead to implant failure include:

- The bone´s density and strength
- The patient´s general health, including the ability to heal after surgery
- The patient´s commitment to oral hygiene
- Smoking
- Parafunction

I understand that biting and chewing will feel different, and it may take time to get used to the new sensations. In addition, the prosthetic teeth will require maintenance, as they will wear with the passage of

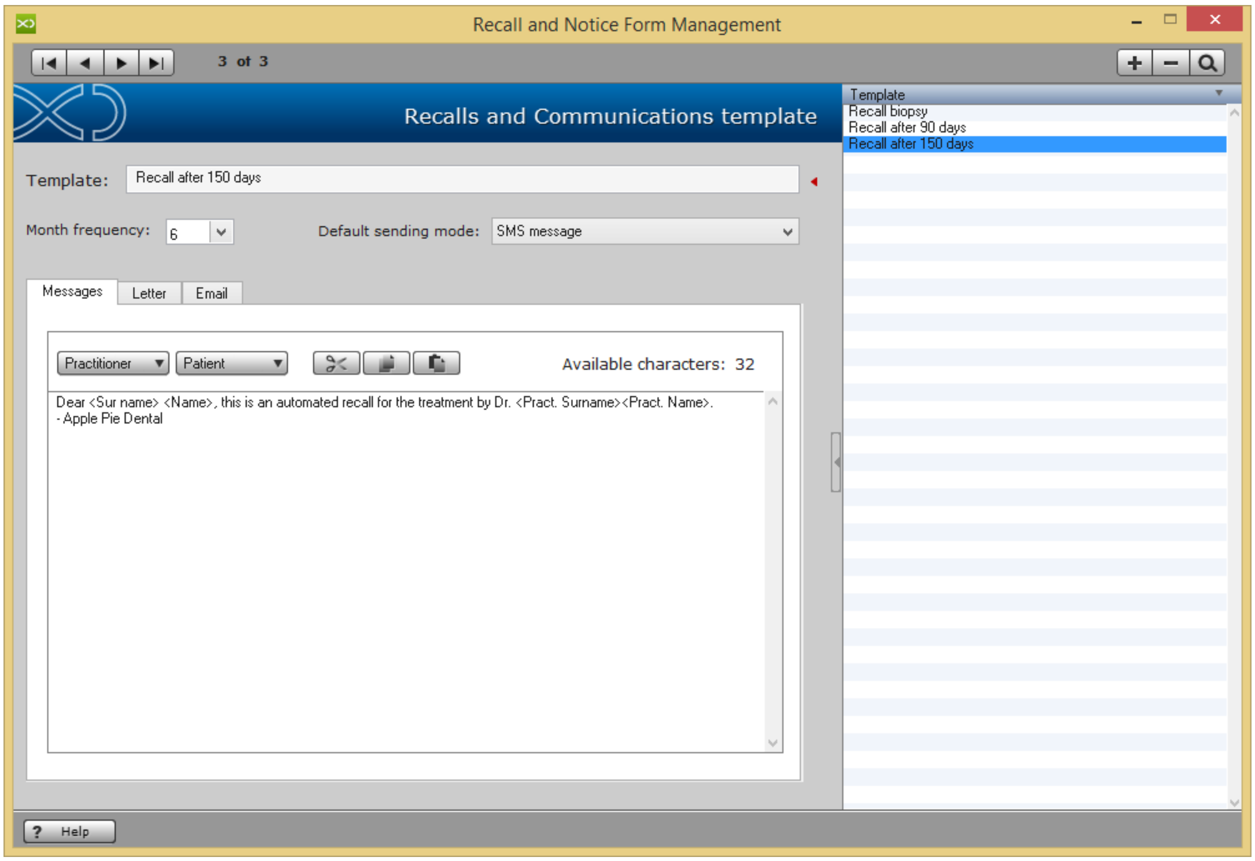
13.3. Communication Forms

How to Create/Add/Edit/Delete Communication Form in XDent?

Documents > Communication Form

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

Communication Form consist of reminder/recall message and email template.



13.4. Medical History Questioners

How to Create/Add/Edit/Delete Medical History Questioners in XDent?

Documents > Medical History Questioners Form

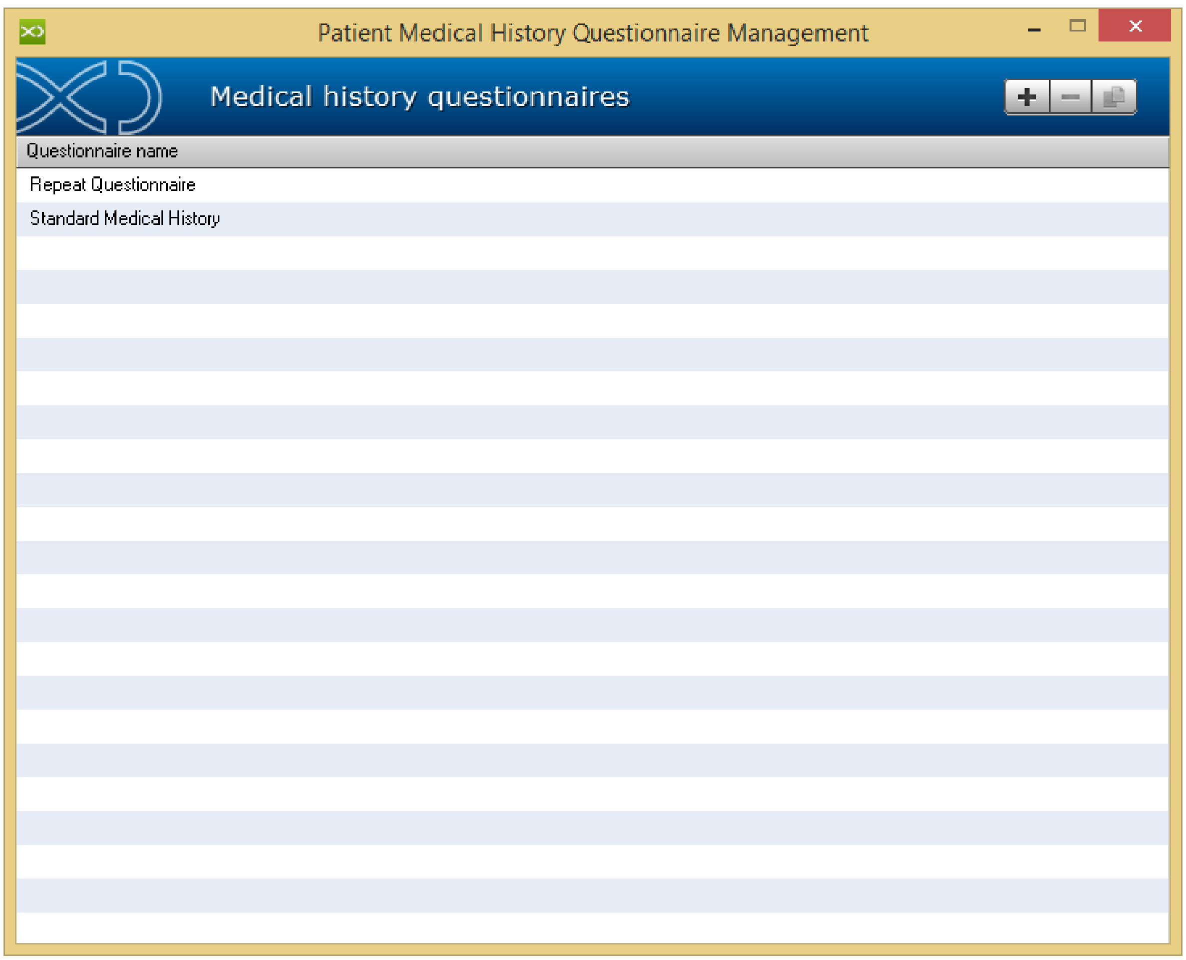
Clinic able to manage by Create/Add/Edit/Delete medical history questionnaires in this form module.

The management of medical history consists of two phases:

- preparing the questionnaire
- filling out the questionnaire

Setting medical history questionnaires gives you the chance to classify the medical histories by general data and/or by medical specialties of your practice.

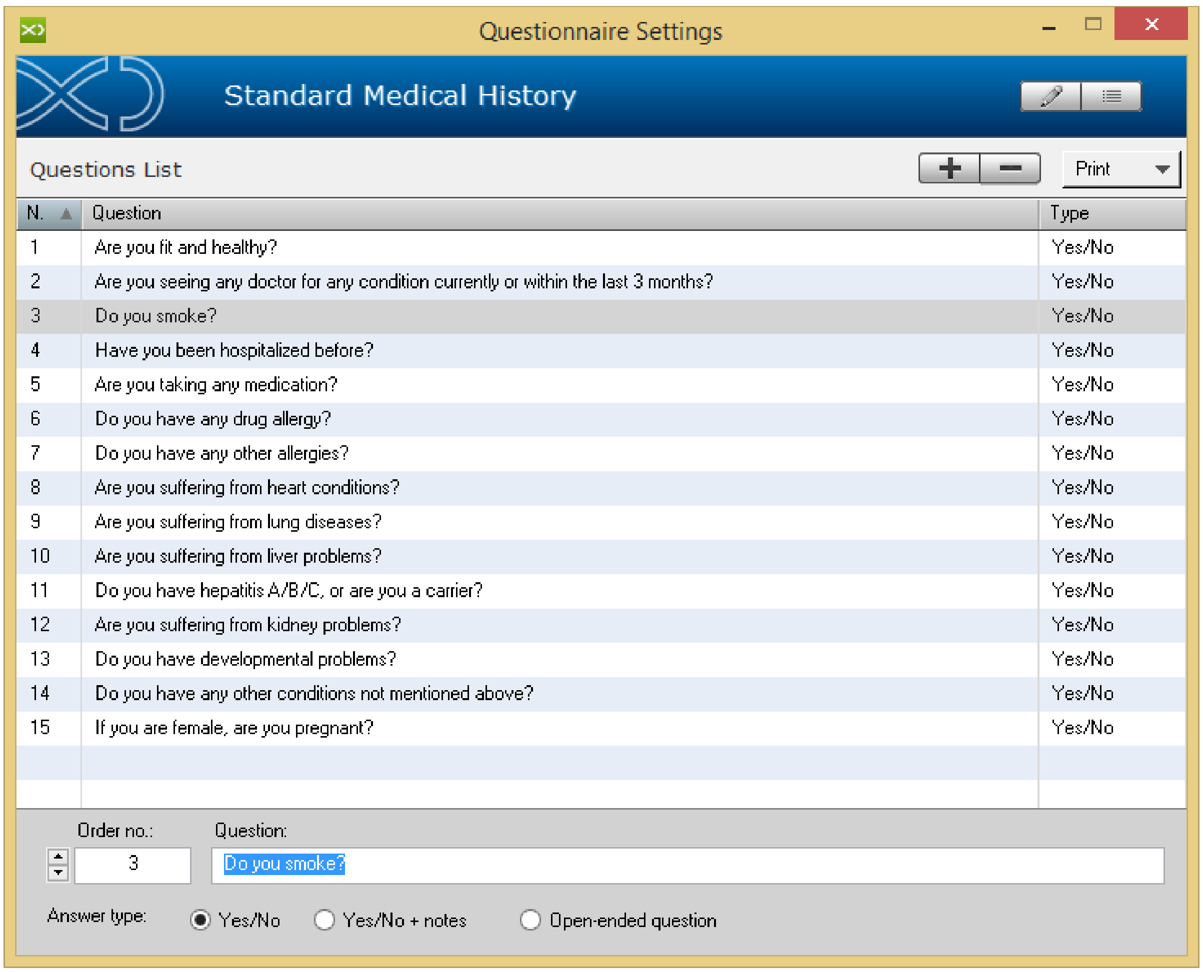
To set your practice questionnaire from Documents menu, open Medical history Questionnaire.



Each questionnaire is identified by its unique name and to edit the questions of a questionnaire double-click on the name of the questionnaire in the list.

All questions can have only type of single answers and answer type Yes/No with note allows to set questions that include your patient single answer or an answer with notes. For example “Do you smoke? How many cigarettes per day?” or >"Do you take prescribed drugs on a regular basis? Which one?”

You can edit the order of the questions by using the buttons (Up and Down) placed next to the order number of the questions.



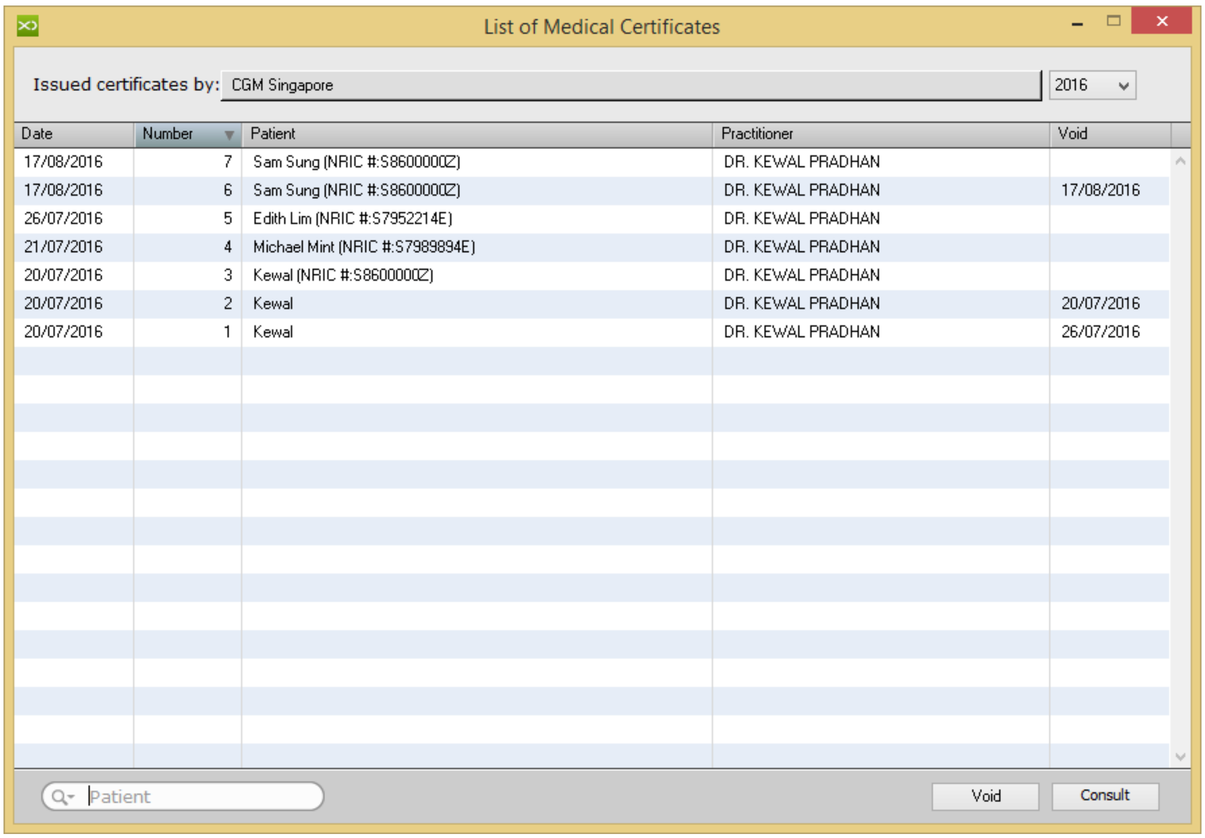
On how to activate the selected Medical Questionnaires for the Patient in iPad Studio setup, (Refer #7.1.6)

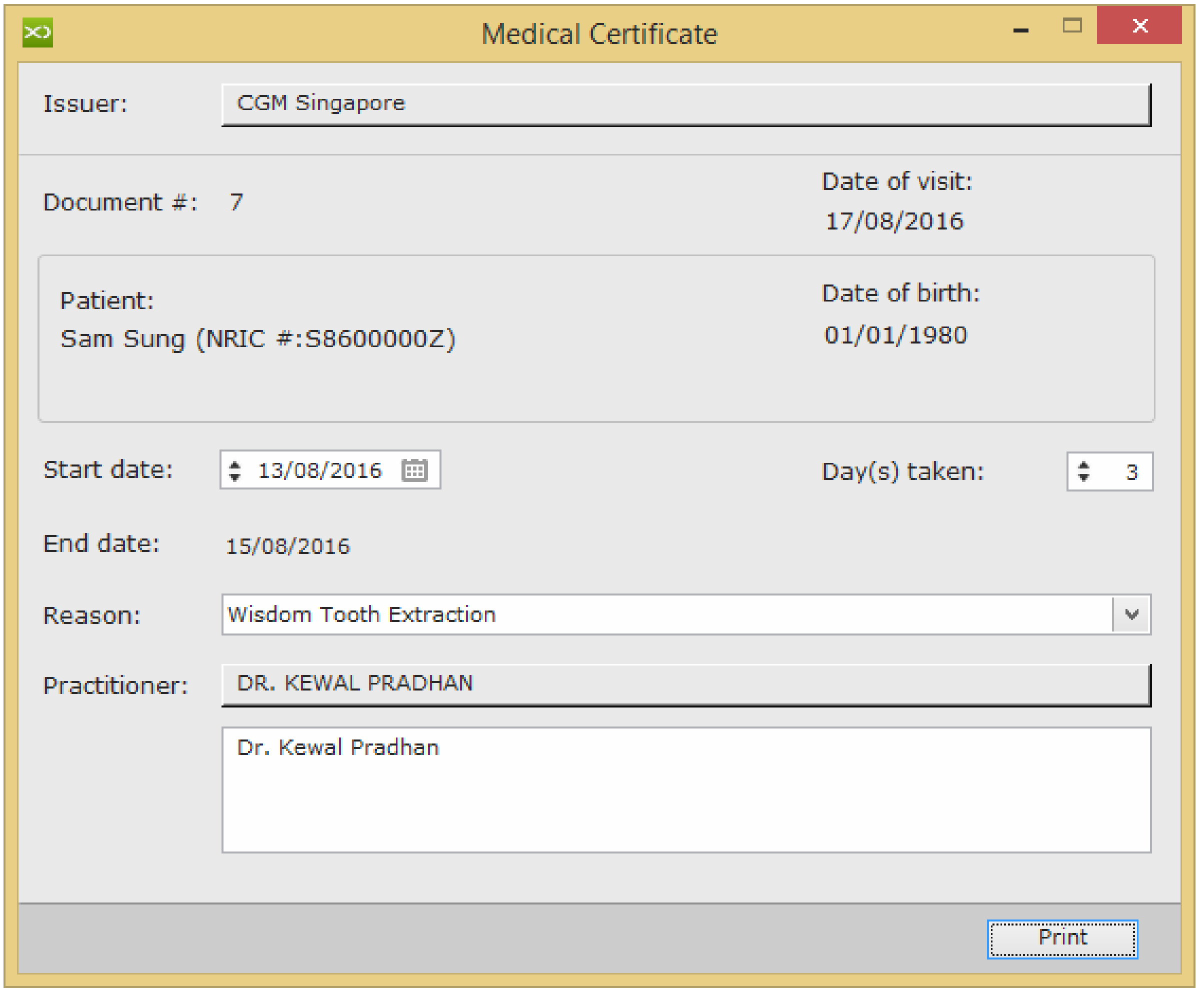
13.5. Medical Certificates

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

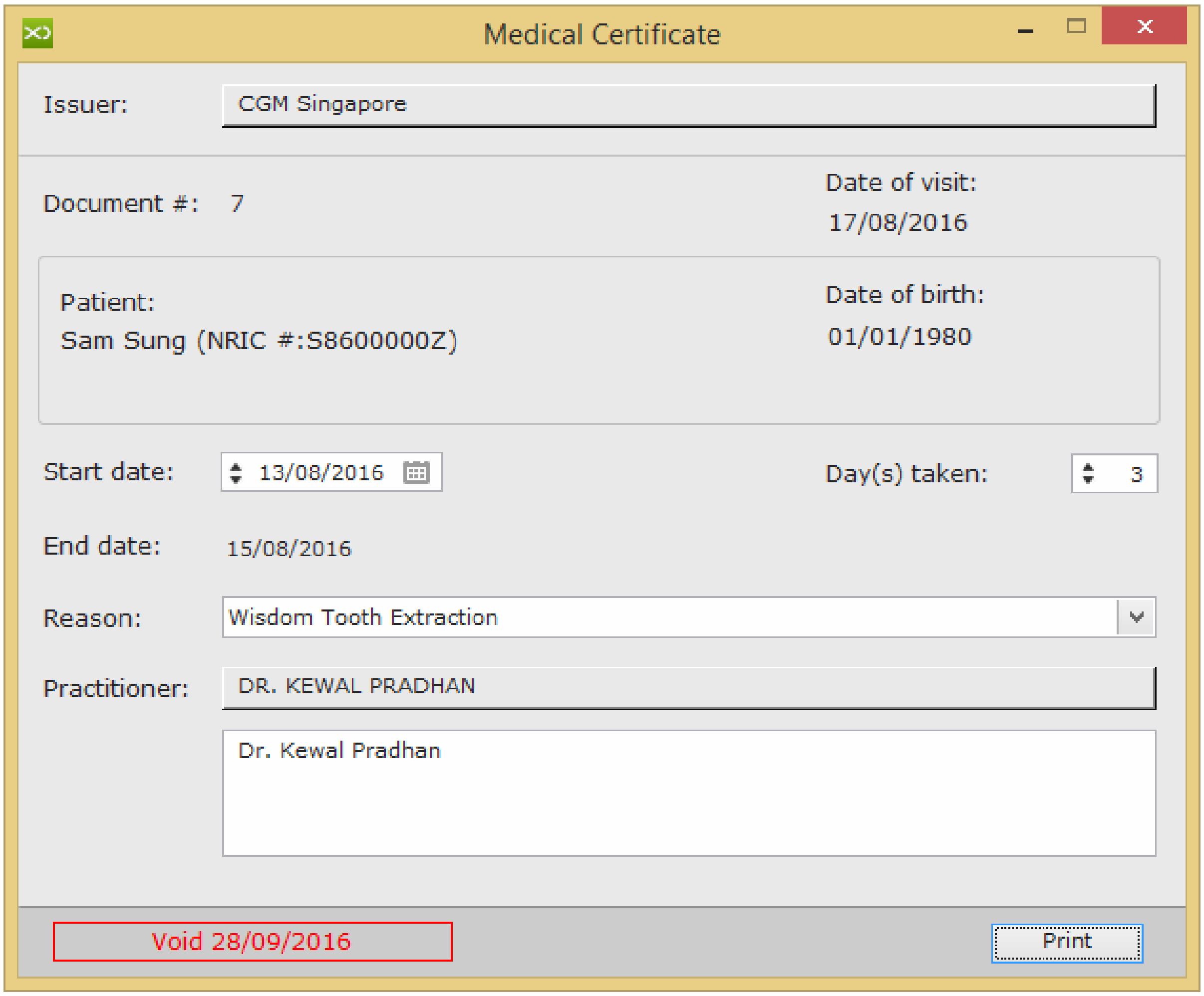



Medical Certificate
Issuer:
CGM Singapore
Document #: 7
Date of visit:
17/08/2016
Patient:
Sam Sung (NRIC #:S8600000Z)
Date of birth:
01/01/1980
Start date:
13/08/2016
Day(s) taken:
3
End date:
15/08/2016
Reason:
Wisdom Tooth Extraction
Practitioner:
DR. KEWAL PRADHAN
Dr. Kewal Pradhan
Print

How to Delete Medical Certificate in XDent?

Medical Certificate cannot be deleted from XDent, only voided and once an MC is issued, it cannot be edited.

To Void MC, select the Patient and click Void button.



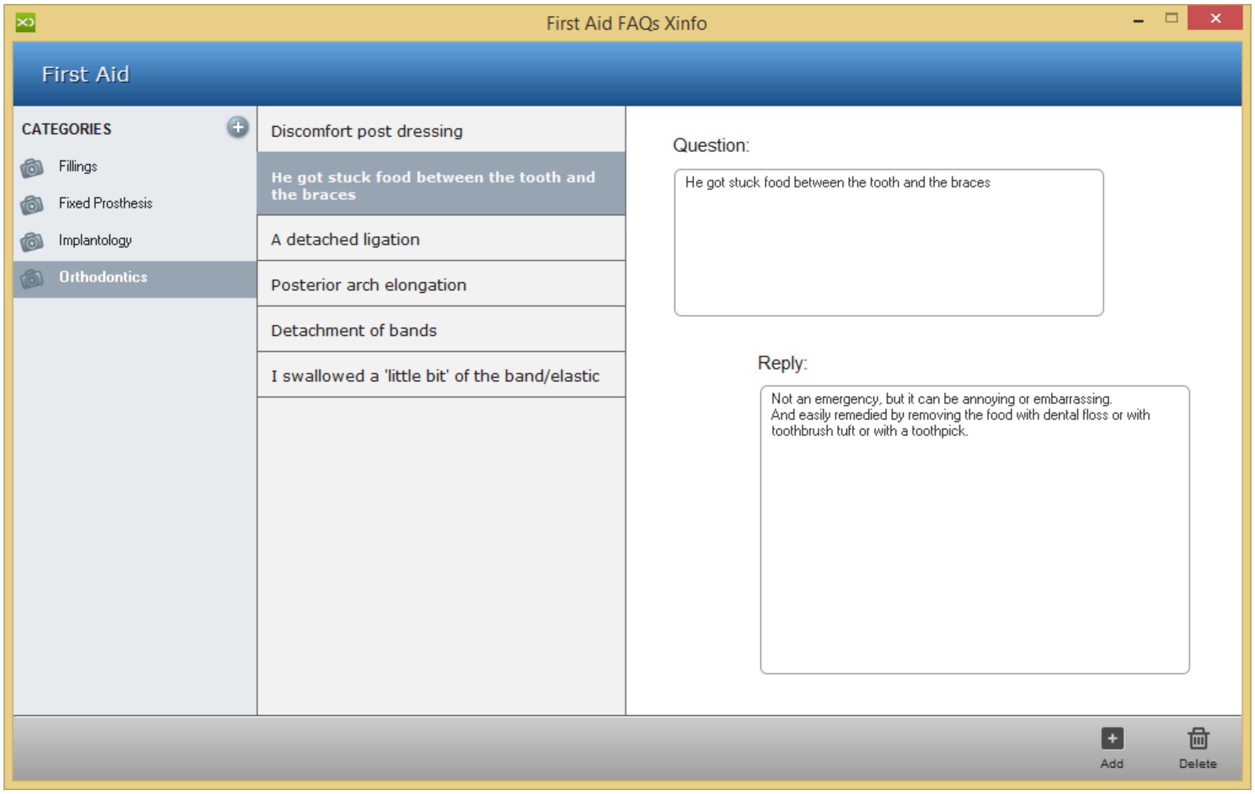
On how to issue Medical Certificate to the Patient, (Refer #7.1.12)

13.6. First Aid FAQs

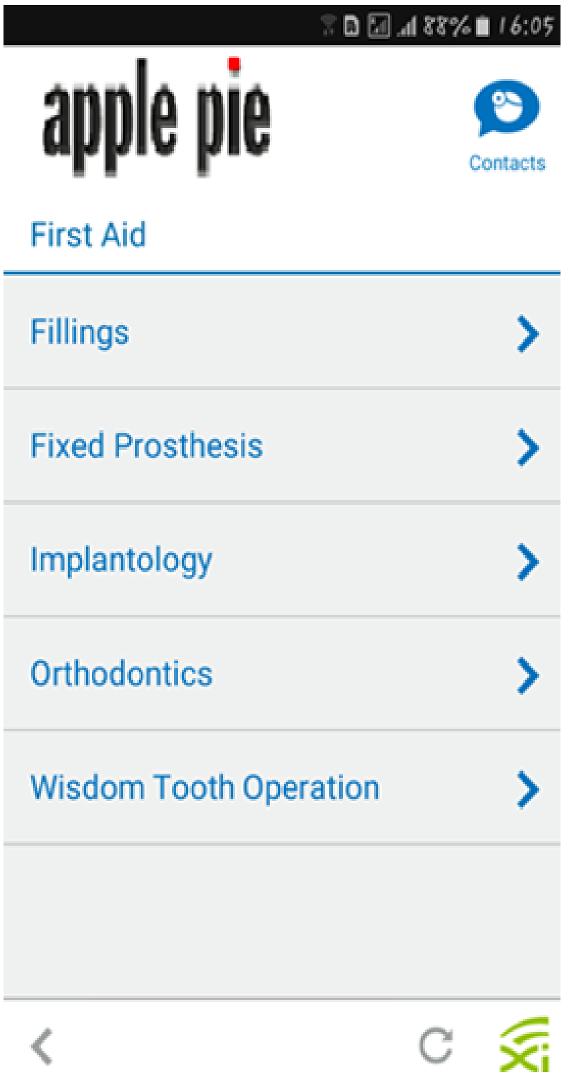
How to Manage First Aid FAQs notes in XDent?

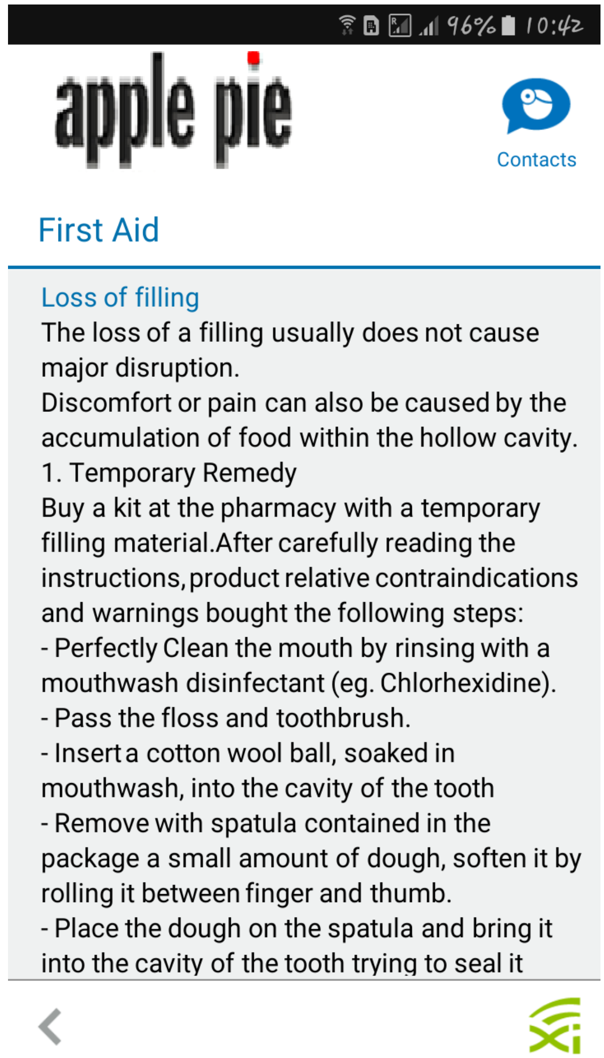
Documents > First Aid FAQs
Clinic able to Create/Add/Edit/Delete questionnaires for First Aid.

In First Aid FAQ, you can set frequent questions and answers, create Category and sub-category.



First Aid is a very useful function for XInfo users. This info can be accessed by the Patient from the XInfo Smartphone App. By clicking “First Aid”, the most frequent first aid-related questions can be accessed. The Patient could then consult anytime the doctor advice and the procedures to follow.

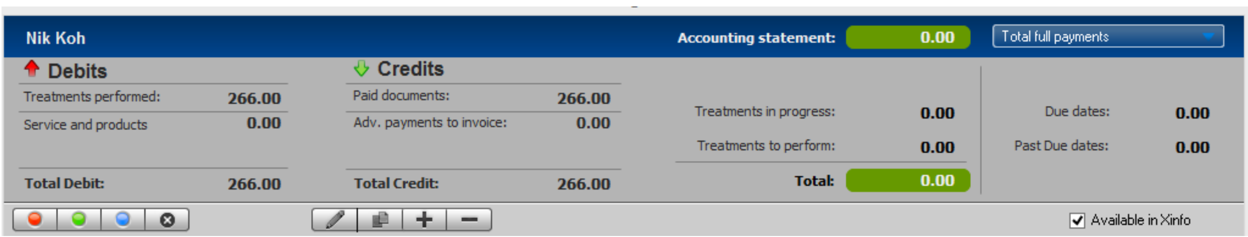




14. ACCOUNTING

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.



Patient Debts can be found which are given by the sum of all the treatments performed and all the services and products bought by the patient. Credits are displayed in lists of total revenue, the record displays the total amount for treatments in progress, the total amount for treatments to be performed and the total balance of the treatment plan (or of the accounting record overall) when all treatments have been performed.

Tips: In Accounting Process

- ➔ To generate Accounting Record
  Step 1 – Issue Invoice
  Step 2 – Issue Receipt

- ➔ If issue wrongly or unwanted Account record
  Step 1 – Issue Credit note
  Step 2 – Issue new Invoice and Receipt

  OR

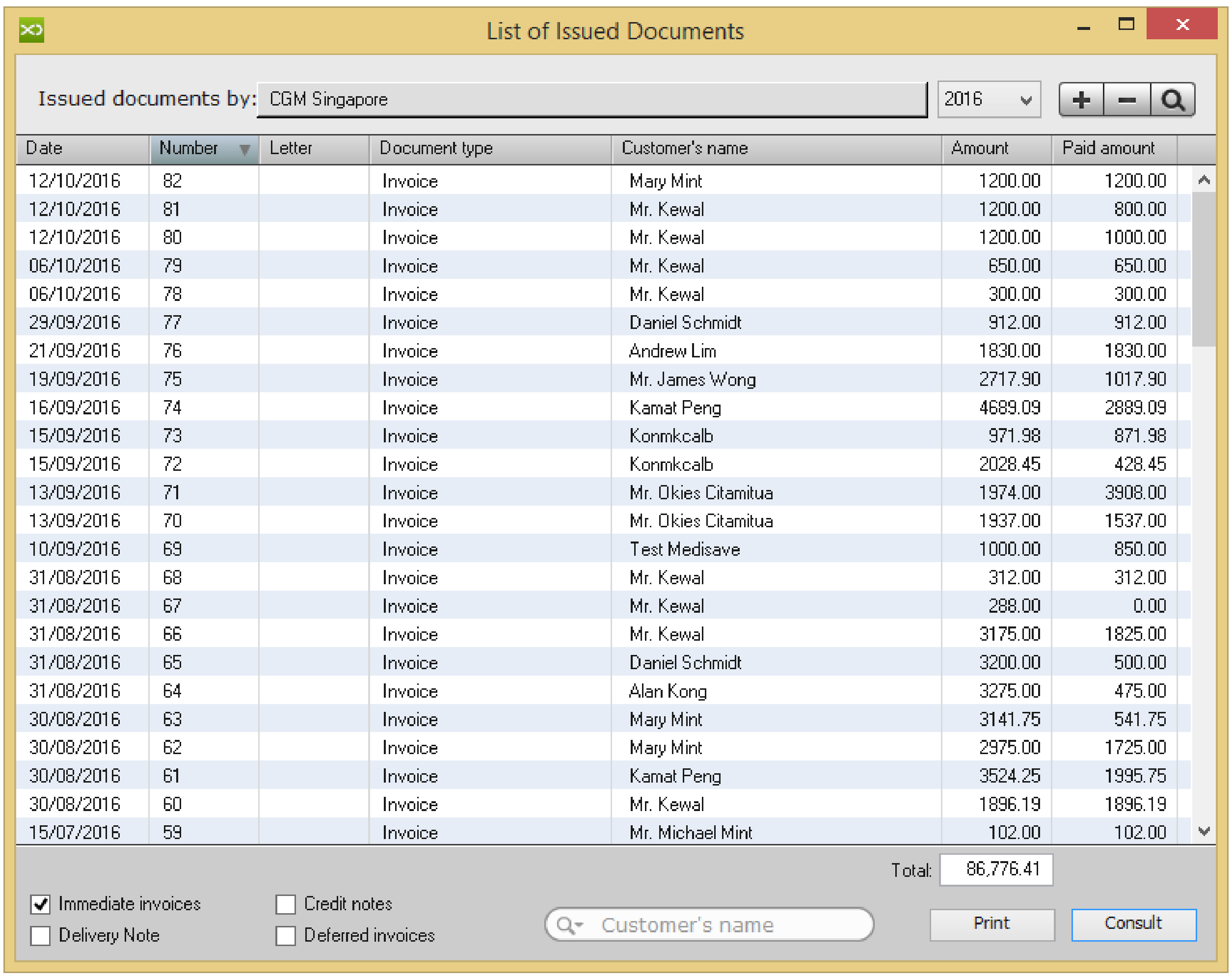
  Step 1 – Delete Receipt
  Step 2 – Delete Invoice or Edit Invoice

14.1. Invoices

14.1.1. Issue Invoices

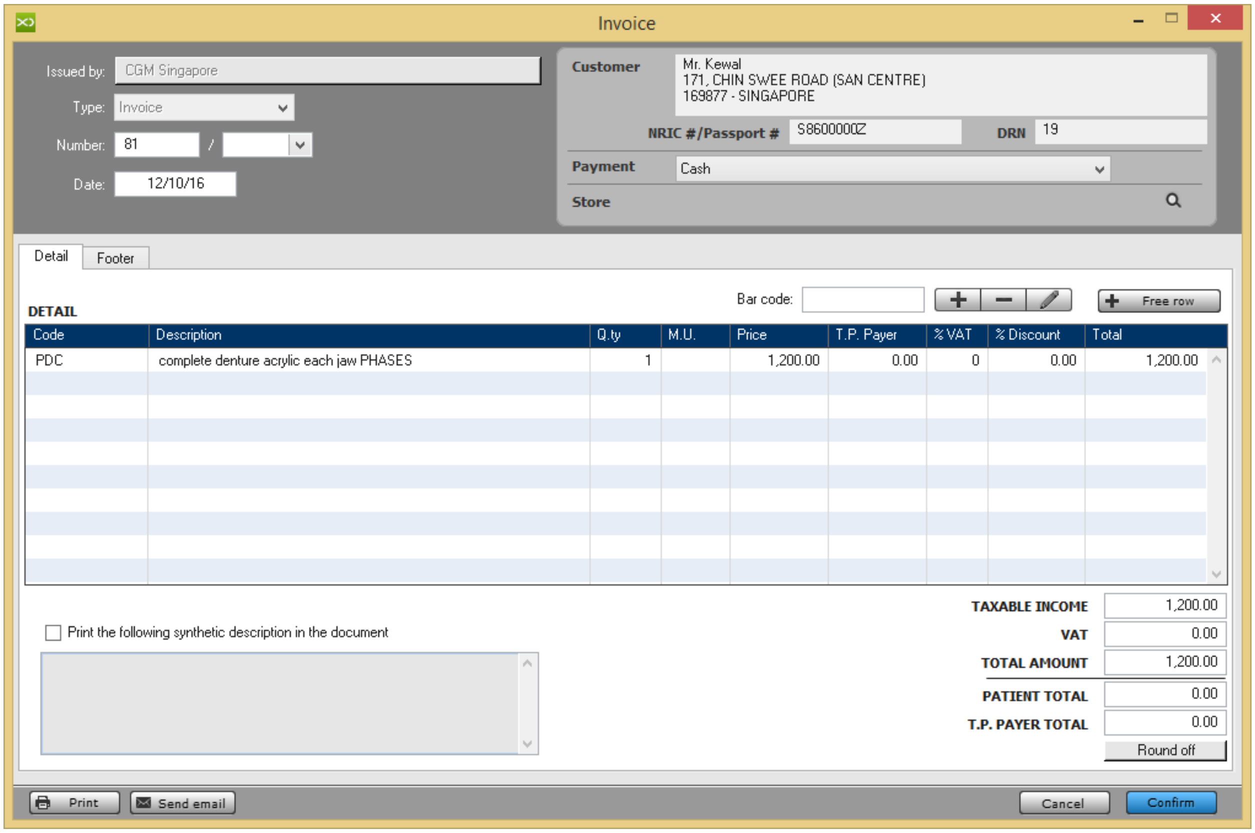
Where to find list of Invoice that has been issued in XDent?

Accounting > Documents to be Issued > Immediate Invoices
Clinic able to view the list of Invoice that has been issued to the Patient from the Clinic, also able to search directly by Patient Name; Year and also by Issuer Clinic.



Date	Number	Letter	Document type	Customer's name	Amount	Paid amount
12/10/2016	82		Invoice	Mary Mint	1200.00	1200.00
12/10/2016	81		Invoice	Mr. Kewal	1200.00	800.00
12/10/2016	80		Invoice	Mr. Kewal	1200.00	1000.00
06/10/2016	79		Invoice	Mr. Kewal	650.00	650.00
06/10/2016	78		Invoice	Mr. Kewal	300.00	300.00
29/09/2016	77		Invoice	Daniel Schmidt	912.00	912.00
21/09/2016	76		Invoice	Andrew Lim	1830.00	1830.00
19/09/2016	75		Invoice	Mr. James Wong	2717.90	1017.90
16/09/2016	74		Invoice	Kamat Peng	4689.09	2889.09
15/09/2016	73		Invoice	Konmkcalb	971.98	871.98
15/09/2016	72		Invoice	Konmkcalb	2028.45	428.45
13/09/2016	71		Invoice	Mr. Okies Citamitua	1974.00	3908.00
13/09/2016	70		Invoice	Mr. Okies Citamitua	1937.00	1537.00
10/09/2016	69		Invoice	Test Medisave	1000.00	850.00
31/08/2016	68		Invoice	Mr. Kewal	312.00	312.00
31/08/2016	67		Invoice	Mr. Kewal	288.00	0.00
31/08/2016	66		Invoice	Mr. Kewal	3175.00	1825.00
31/08/2016	65		Invoice	Daniel Schmidt	3200.00	500.00
31/08/2016	64		Invoice	Alan Kong	3275.00	475.00
30/08/2016	63		Invoice	Mary Mint	3141.75	541.75
30/08/2016	62		Invoice	Mary Mint	2975.00	1725.00
30/08/2016	61		Invoice	Kamat Peng	3524.25	1995.75
30/08/2016	60		Invoice	Mr. Kewal	1896.19	1896.19
15/07/2016	59		Invoice	Mr. Michael Mint	102.00	102.00

Either double click on the Invoice or Select and click Consult button to view Invoice of that Patient.



On how to issue Invoice to the Patient, (Refer #7.1.10)

14.1.2. Incoming Invoices

Pending

14.2. Receipts

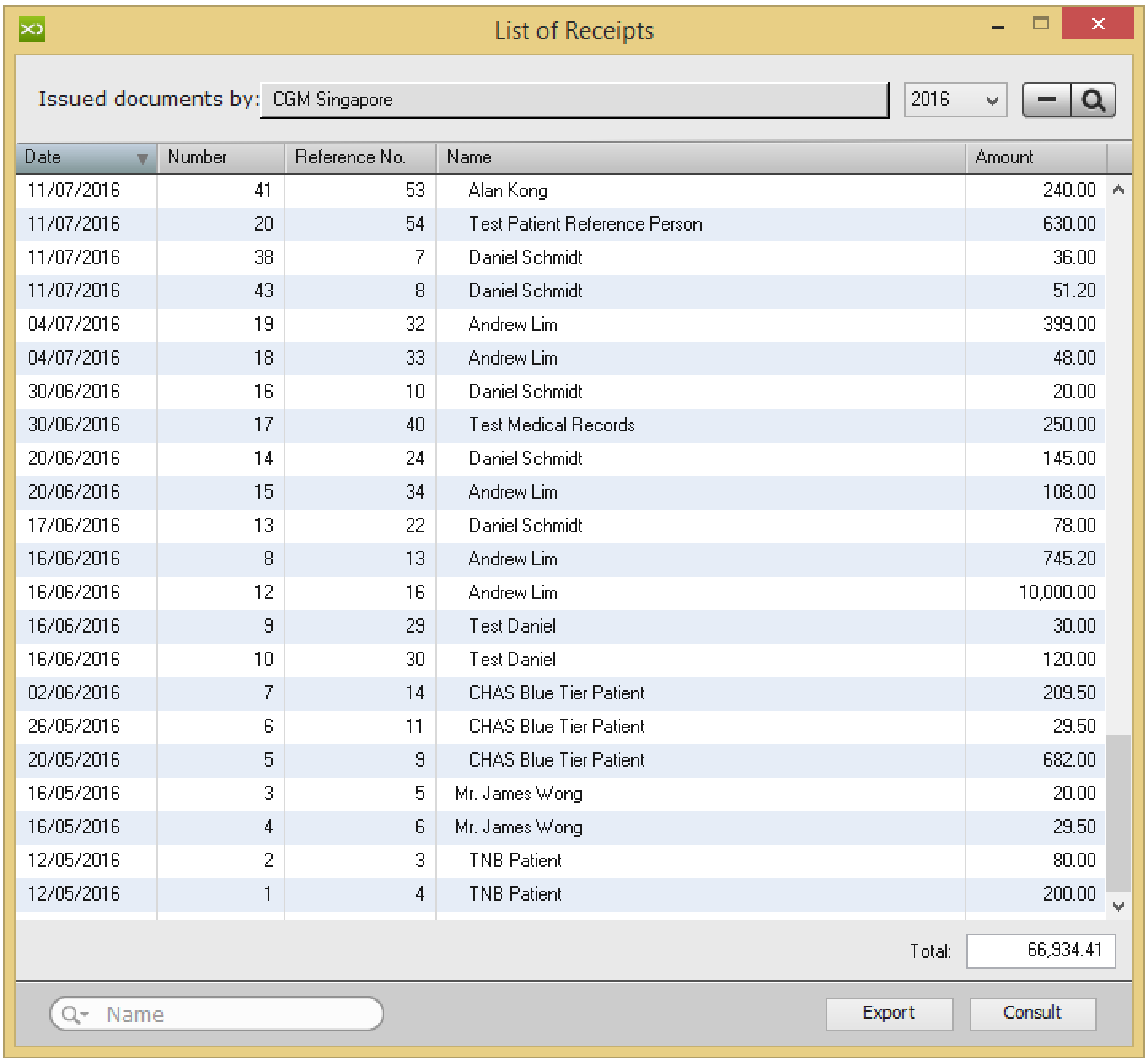
Where to find list of Receipt that has been issued in XDent?

Accounting > Documents to be Issued > Receipts List

Clinic able to view the list of Receipts that has been issued to the Patient from the Clinic, also able to search directly by Patient Name; Year and also by Issuer Clinic.

Receipt list is able to Export from XDent in HTML; Text; CSV and Excel format

Unwanted Receipt can be deleted



Date	Number	Reference No.	Name	Amount
11/07/2016	41	53	Alan Kong	240.00
11/07/2016	20	54	Test Patient Reference Person	630.00
11/07/2016	38	7	Daniel Schmidt	36.00
11/07/2016	43	8	Daniel Schmidt	51.20
04/07/2016	19	32	Andrew Lim	399.00
04/07/2016	18	33	Andrew Lim	48.00
30/06/2016	16	10	Daniel Schmidt	20.00
30/06/2016	17	40	Test Medical Records	250.00
20/06/2016	14	24	Daniel Schmidt	145.00
20/06/2016	15	34	Andrew Lim	108.00
17/06/2016	13	22	Daniel Schmidt	78.00
16/06/2016	8	13	Andrew Lim	745.20
16/06/2016	12	16	Andrew Lim	10,000.00
16/06/2016	9	29	Test Daniel	30.00
16/06/2016	10	30	Test Daniel	120.00
02/06/2016	7	14	CHAS Blue Tier Patient	209.50
26/05/2016	6	11	CHAS Blue Tier Patient	29.50
20/05/2016	5	9	CHAS Blue Tier Patient	682.00
16/05/2016	3	5	Mr. James Wong	20.00
16/05/2016	4	6	Mr. James Wong	29.50
12/05/2016	2	3	TNB Patient	80.00
12/05/2016	1	4	TNB Patient	200.00

On how to issue Receipt to the Patient, (Refer #7.1.10)

14.3. Delivery Note

Pending

14.3.1. Issue Delivery Notes

14.3.2. Incoming Delivery Notes

14.4. Deferred Invoice

Pending

14.4.1. Issue Deferred Invoice

14.4.2. Incoming Deferred Invoice

14.5. Credit Note

A credit note can be issued directly from the patient accounting record, however only with relation to the VAT-free treatments. The note will be associated to the treatment plan selected. Obviously, this could not be associated to the single treatment of the same. In the patient accounting record, the credit note is listed together with the treatment plan-related issued invoices. It is clear that the payment of the credit note decreases the total amount of the documents paid. The issue of a credit note generates a prime entry transaction with "Issuing a Credit Note" type and its payment generates a prime entry transaction with "Payment of Credit Note" type.

If a Credit Note is to be issued with relation to the VAT-based treatments, this could be done directly from Credit Note in the Issued Documents of the Accounting menu.

Pending

14.5.1. Issue Credit Notes

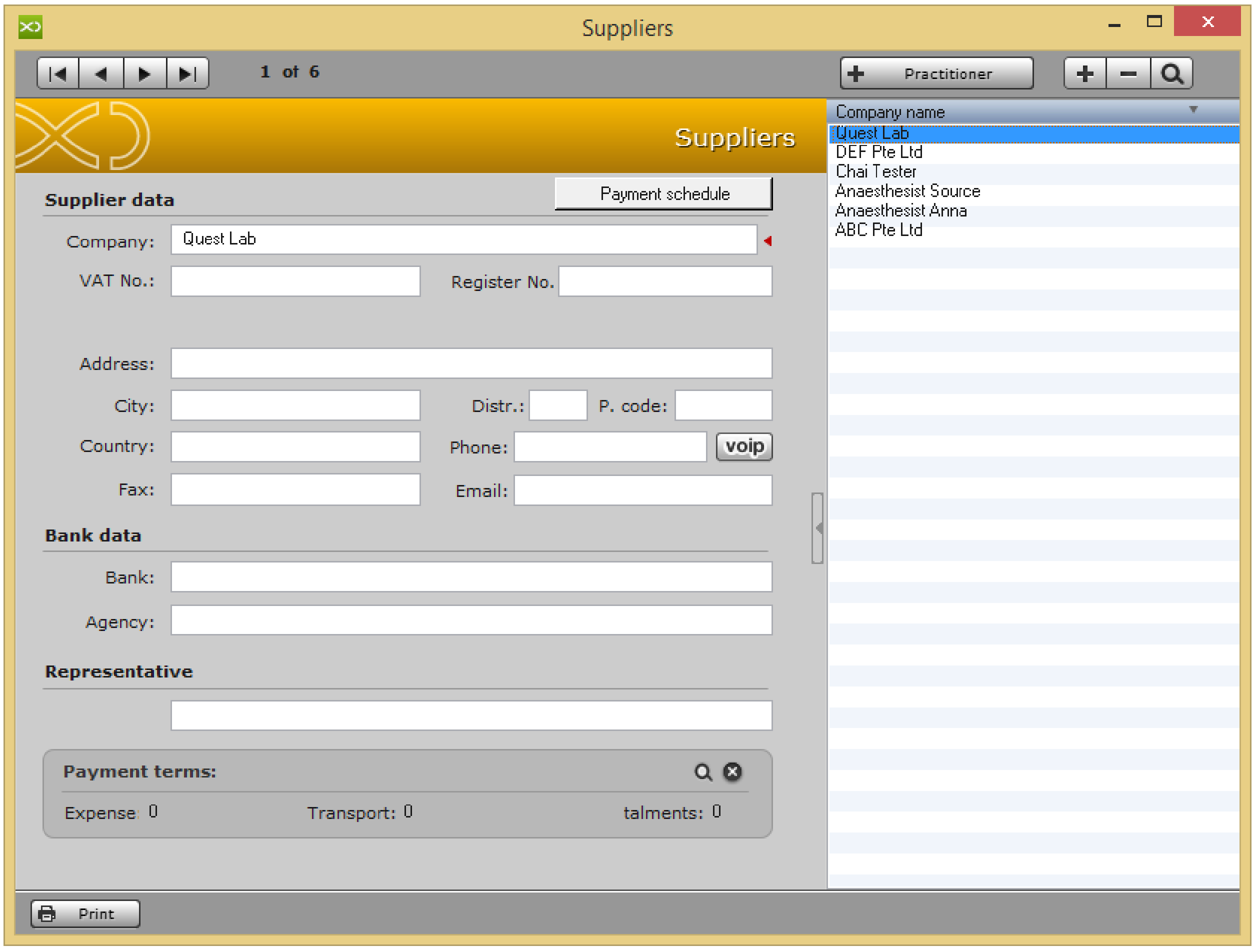
14.5.2. Incoming Credit Notes

14.6. Suppliers

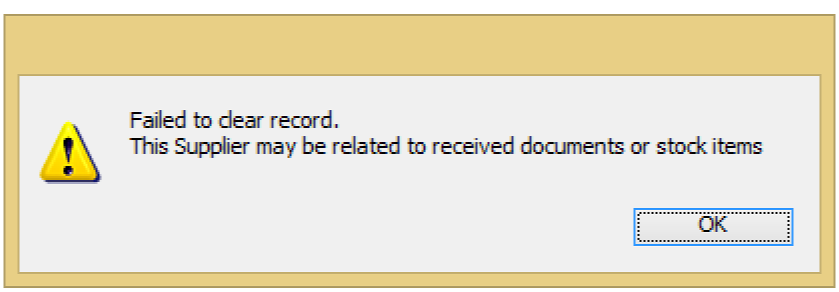
How to Register a Supplier in XDent?

Accounting > Supplier

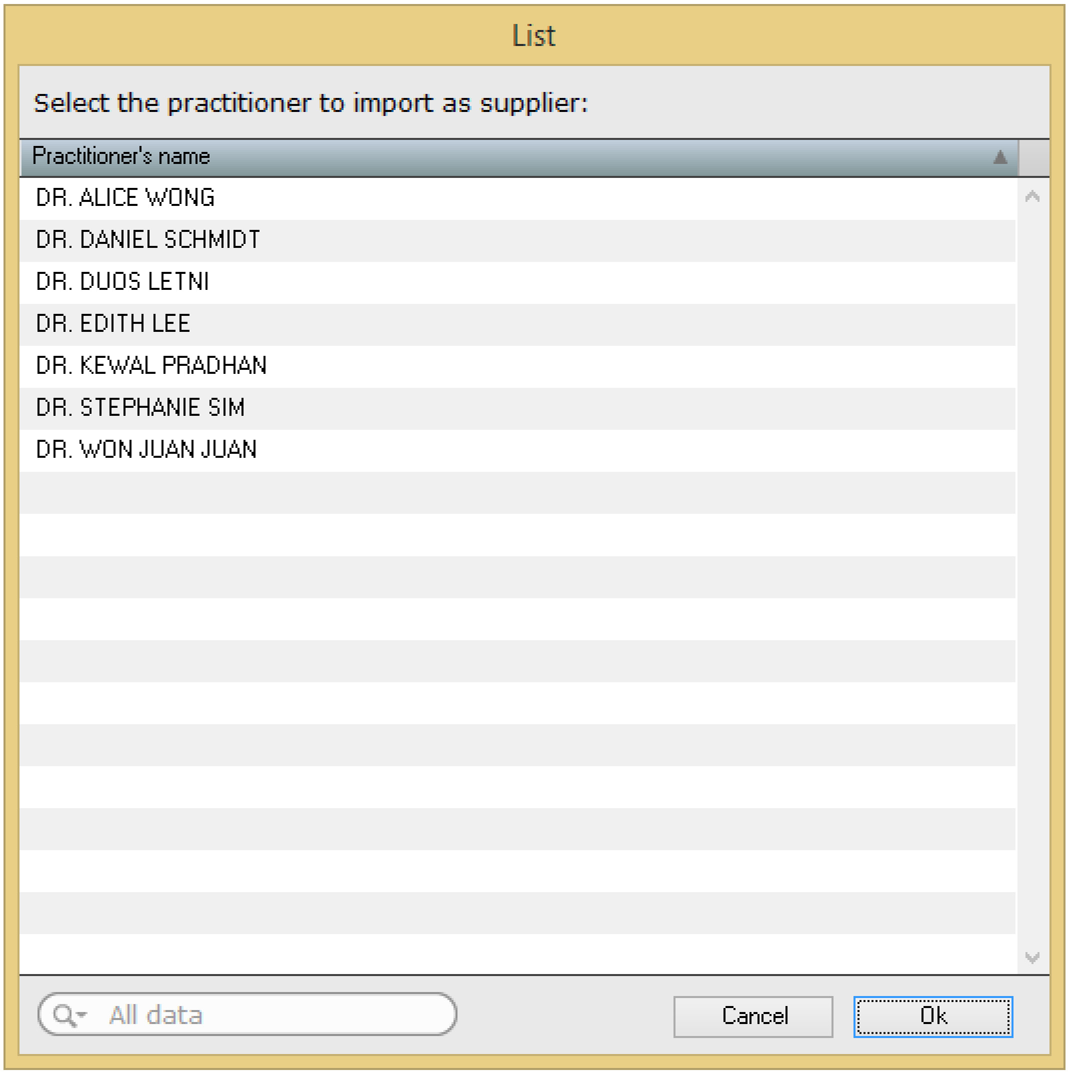
Clinic able to Create/Add/Edit/Delete supplier in accounting module.



If the Supplier have pending receiving documents or stock item then supplier account is unable to delete unless clear those pending records.



Clinic also able to add Practitioners as a Supplier from the list of Practitioners.



14.7. Early Note

Pending

15. STOCK

Stock Module allow to manage stock inventory in the Clinic as Clinic can enter inventory items, consumable or any other sales items and also able to view the transaction of each item that has been loaded and unloaded from delivery and invoicing.

Tips: In Stock Process

- ➔ To Load New Stock Record from New Supplier in Warehouse

  Step 1 – Create Supplier

  Step 2 – Create Item Record

  Step 3 – Add Stock Loading

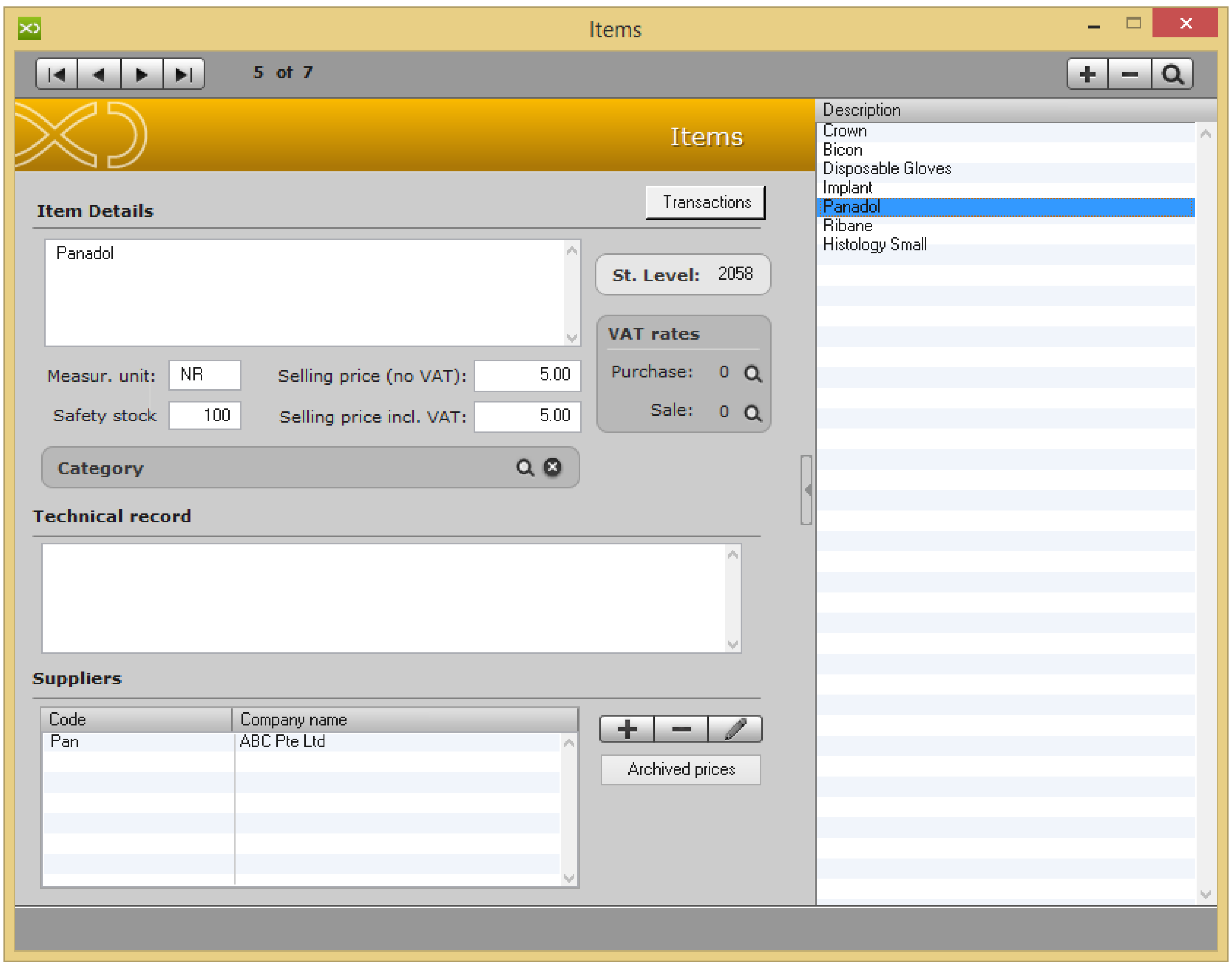
15.1. Item

How to Add Item Stock in XDent?

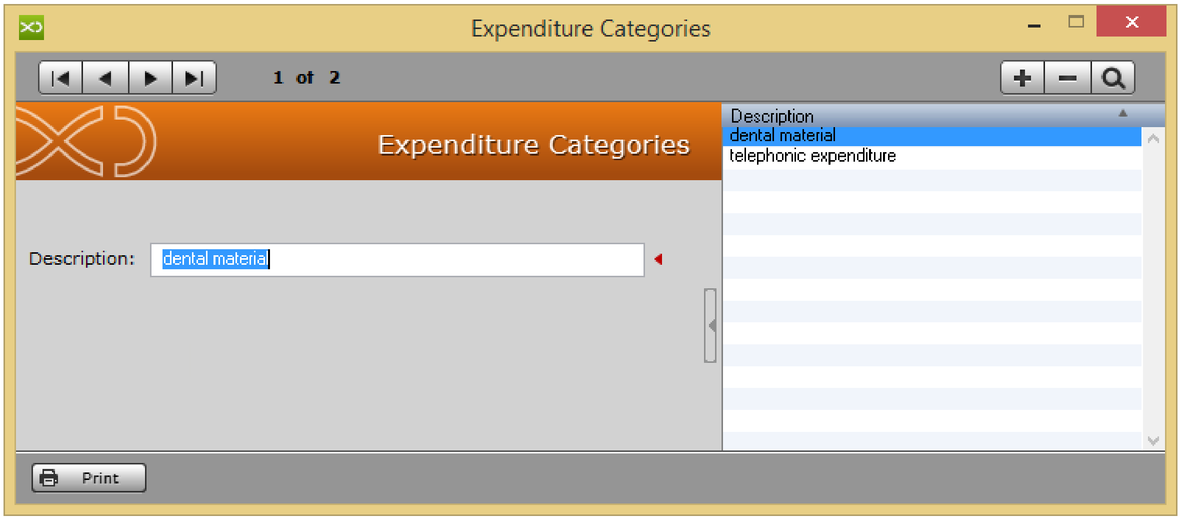
Stock > Item > Records

Clinic able to Create/Add/Edit/Delete item record in stock module.

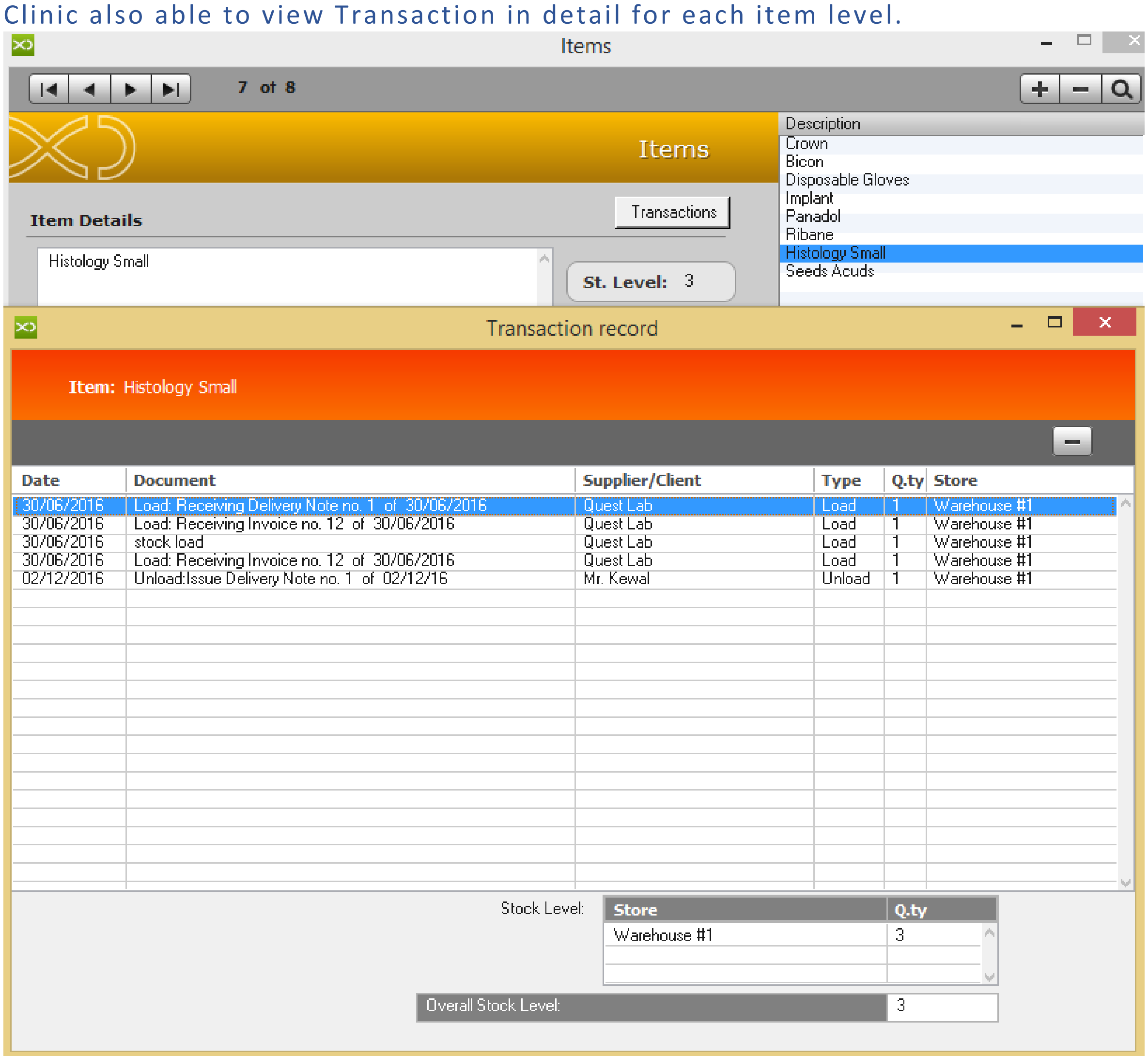
When add item, required to state measuring unit, safety stock, selling price, VAT (GST) rate and link the item with Supplier. As clinic also able to select expenditure categories for grouping and reporting purpose.



To add new expenditure categories, go to Main Menu Accounting > Expenditure Categories



Clinic also able to view Transaction in detail for each item level.

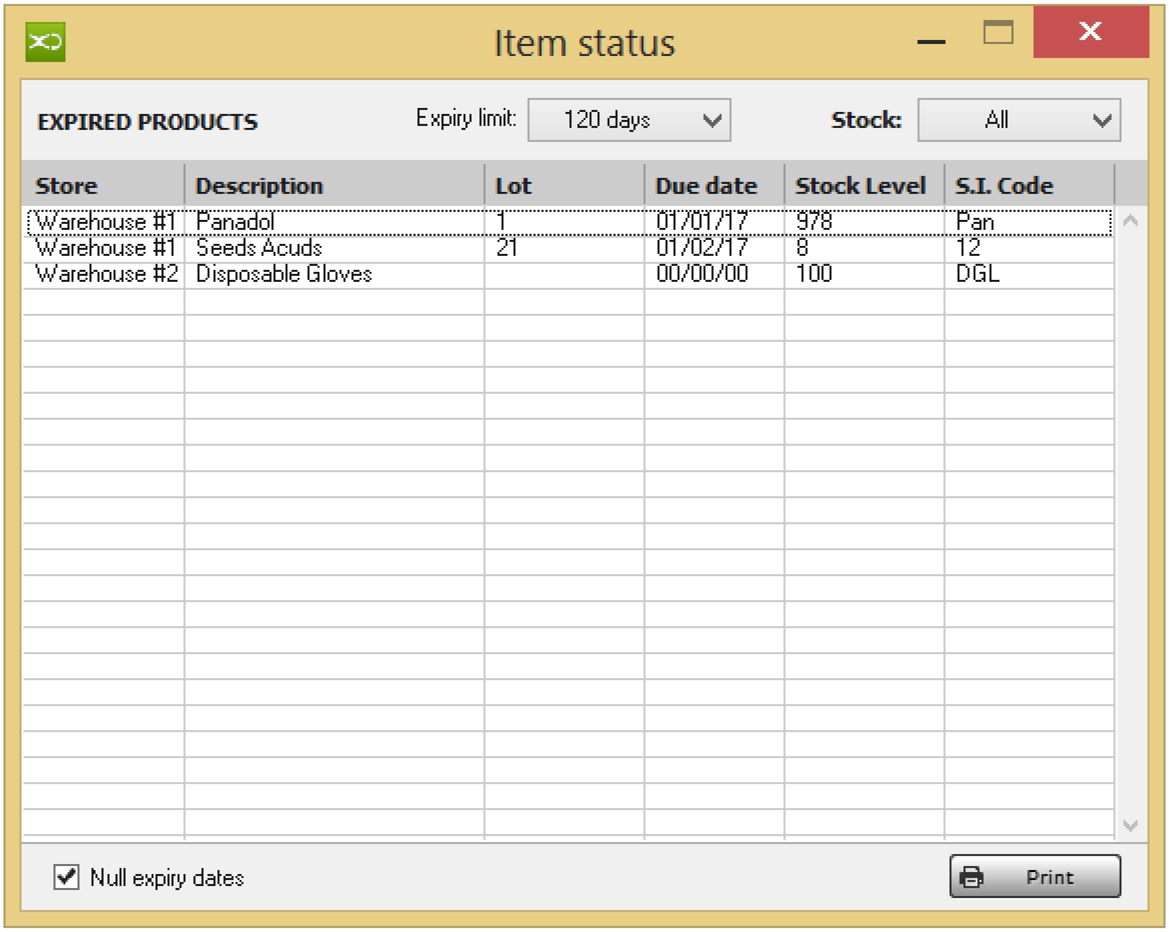


How to check the Item that is about to Expired or already Expired in XDent?

Stock > Item > Expired

Clinic able to check the item that has been expired.

Able to select the Expiry limit from “today until next 180 days”

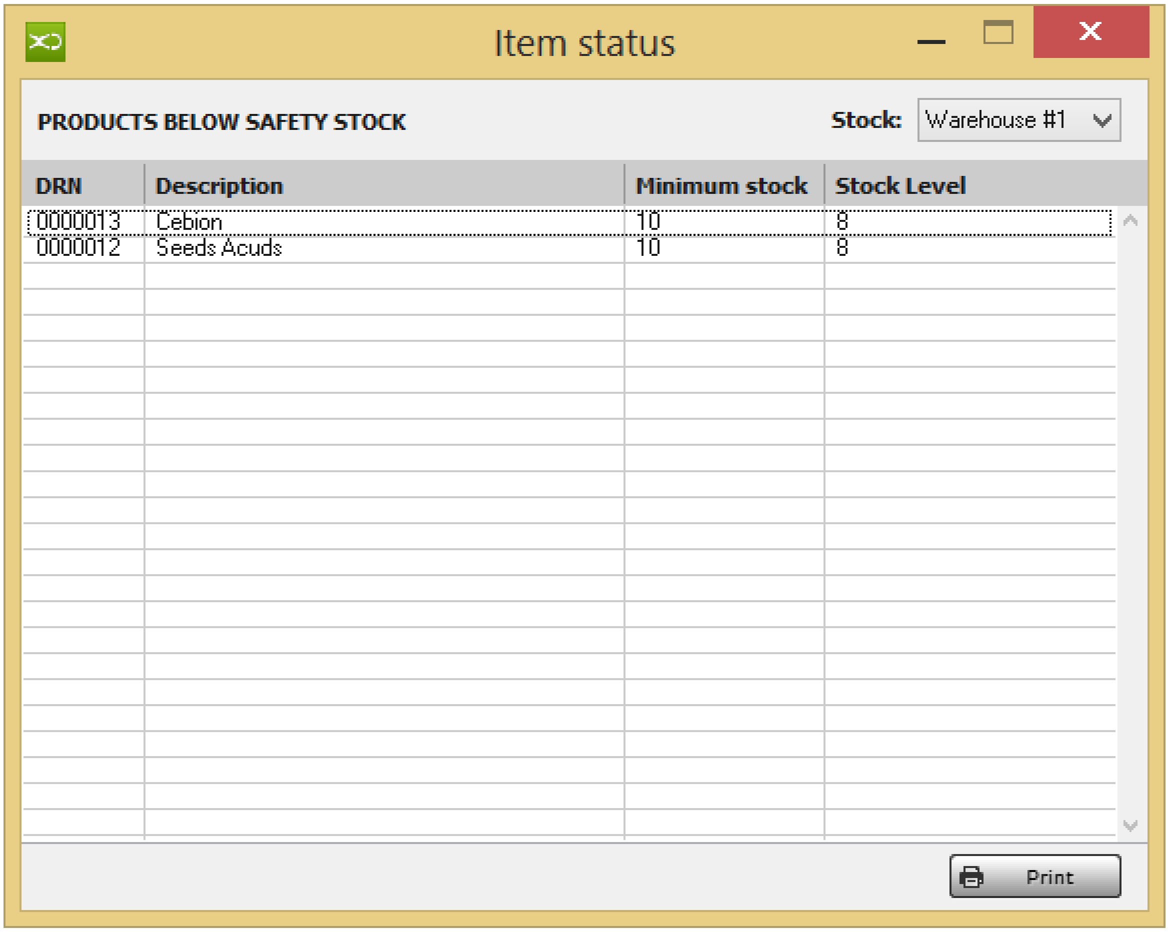


How to check the item that is running below the Safety Stock Level in XDent?

Stock > Item > Below Safety Stock

Clinic able to check the item that is running lower than stated Safety Stock level.

Clinic also able to see stock level of different warehouse.



15.2. Supplier List

Pending

15.3. Order Management

Pending

15.4. Inventory

Pending

15.4.1. Evaluation

15.4.2. Stock Level

15.5. Stores

Pending

15.6. Stock Loading

Pending

15.7. Stock Unloading

Pending

15.8. Stock Transfer

Pending

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. 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

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

17. SERVICES

Pending

17.1. Xchat

17.2. Xinfo

17.3. Xsync

17.4. Xbackup

18. OPERATIONS

Pending