Shire Dental System

SECOND TRAINING SESSION

CHARTING NOTES

SHIRE DESIGN SYSTEMS LIMITED
Edwin Foden Business Centre
Moss Lane, Sandbach
Cheshire, CW11 3AE

Support/Training Tel: 01270 759949
Fax: 01270 750659
www.shiredental.com
Email: support@shiredental.com

August 2010

(Up to Version 1.4.6.2 of the dental software)

CONTENTS

LOGGING ON....6
  Windows Logon....6
  Dental System Logon....6
APPOINTMENT BOOK....7
  Manually Entering Appointments....7
  Appointment Finder....7
  Edit or Resize an Appointment....9
  Cancel/Cancel and Rebook an Appointment....9
  Attending Appointments....9
    Mark an Appointment Attended....10
    Mark an Appointment Unattended....10
    Mark an Appointment Completed....10
    Mark an Appointment Incomplete....10
  Double Book an Appointment....10
  Emergency, Meeting and Break Slots....10
  Edit an Emergency, Meeting, or Break Slot....10
  Cancel an Emergency, Meeting or Break Slot....10
  Move an Emergency, Meeting or Break Slot....10
  Book Into an Emergency Slot....11
MEDICAL HISTORY....12
  Medical History Alerts....12
  Configuring Medical History....12
  Medical History Questionnaire....12
    To Create your Questions:-....13
    To Edit or Delete Questions....14
    To Add a New Sub Item to an Existing Question....14
  Recording Medical History....15
  Viewing Previous Medical History....15
  To Update Medical History....16
  Printing Medical History....16
WORK ENTRY/CHARTING NOTES....17
  Treatment Plan Session Selection Screen....17

Base Chart 17
Start New Plan 17
Edit Existing Plan 17
Continue 17
Course Information Screen – Base Chart 18
Course Information Screen – Start New Plan 19
Edit Existing Plan 20
Charting 20
Tooth Numbering 20
Supernumerary Teeth 21
Tooth Selection 21
Keyboard Selection 21
Mouse Selection 21
Examination 21
Updating the Chart 21
Chart Display Options Only 22
Chart Display Plus Charging Options 22
Charting Fillings 23
Numeric Keypad 23
Treatment Toolbox 23
Selecting the Fees 24
Adding Non-Chartable Work 25
Re-ordering Lines of Treatment 25
Marking Treatment Complete 25
Configuring the Treatment Plan for Appointment Booking 26
Visit Headers (Visit Information) 26
Finalising the Work Entry 27
Treatment Plan Details 27
Completed Treatments 27
Invoicing 28
Navigation 28
Lists 28
Further Actions 28
Notes 28
Close Course 28
Take a Payment 28
Payment Required 29

Appointment(s) Required 29
Completing the Course 29
Journal 29
Journal Options 29
Editing and Adding to the Journal when Charting 30
Journal Glossary 30
Linking Documents 31
Linking Images 31
Viewing and Editing the Journal from the Patient Details Screen 32
Viewing the Journal 32
Editing the Journal 33
RECORDING PAYMENTS 34
To Set Up Payment Methods 34
To Add a Payment Method 34
To Delete a Payment Method 34
PATIENT OVERVIEW SCREEN 34
Family Members 35
Alerts for Selected Family Member 35
Balance 35
Open Treatment Plans 35
Notes 35
TO RECORD A PAYMENT FROM THE OVERVIEW SCREEN 36
TO RECORD A PAYMENT FROM THE PATIENT DETAIL SCREEN 38
Financial Screen 38
Refunds 38
Credits 38
To Delete an Invoice 38
BOOKING APPOINTMENTS FROM THE OVERVIEW SCREEN 39
Book Single Appointment 39
Go to Treatment Plan 39
Manual Booking 40
Click to Find Appointment 40
REPORTS 43
Cashbook Report 43
Cashing Up 43
Printing the Report by Date and Time 44
Aged Debt Report 45

Debt Selection....45
Output Options....46
Print....46
Preview....46
File (.csv)....46
File (.xml)....46
Excel....46
Word Merge....46
Statements....47
Recalls....49
Printed Output....50
File Output....51
Electronic Output....52
SMS Template....53
Email Template....53
Tokens for Electronic Output....53
NHS....55
Provider Details....55
FP17 Form Printing....55
Printing the FP17 Form Header....55
Manually Completing and Printing the FP17 Form....56
Printing a Completed FP17 Form....56
NHS - WEBEDI TRANSMISSIONS....57
Registration and Configuration....57
NHS Fee Scale....57
Exemption/Remission....57
Processing Claims....58
Unprocessed Tab....58
Queued for Transmission Tab....58
Awaiting Acknowledgment/Reject Claims Tab....58
UDA Data....59
USING THE CLIPBOARD....60

LOGGING ON

WINDOWS LOGON

Username =	D1		(server)
	D2	etc	(workstation pc)
Password =	theos		

DENTAL SYSTEM LOGON

Username = Your own username (initials)

Password = Your own password (if you have one)

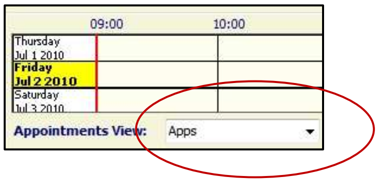
APPOINTMENT BOOK

MANUALLY ENTERING APPOINTMENTS

1) Patients must be registered before appointments can be booked – either as fully registered or express registered patients.

2) Click **Appointment Book** on the toolbar or on the **Patient Detail** screen.

3) Make sure that the correct **View** is displayed and select the date in the **Viewing Date** window or use the movement bar to scroll through the book.



Today	**Display today's date**	**1d**	**Forward one day**
1d	**Back one day**	**1w**	**Forward one week**
1w	**Back one week**	**1m**	**Forward one month**
1m	**Back one month**	**3m**	**Forward three months**
3m	**Back three months**	**6m**	**Forward six months**
6m	**Back six months**		

4) Scroll through the appointment book to find a suitable appointment.

5) Double click the slot required or right click the slot and select **Enter Appointment**.

6) Specify the **Category** and confirm the length of the appointment.

7) Select the **Provider** if this isn't already displayed.

8) If you navigated to the appointment book from the **Patient Detail** screen, the patient details will already be displayed. Otherwise, click **Patient Lookup**, to search for and select the patient.

9) If it's a family appointment, click the **Family Booking** button, otherwise leave the **Individual Patient Booking** button selected. Family bookings will display an image of two heads on the right hand side of the appointment details once the appointment has been confirmed.

10) Type any other relevant information in the **Additional Information** box – optional.

11) Click **Book Appointment**.

NOTE: The appointment details will be displayed on the **Future Appointments** section of the **Patient Detail** screen.

APPOINTMENT FINDER

1) Click **Appointment Finder** on the toolbar or on the **Patient Detail** screen.

2) Search for and select the patient if you have clicked the toolbar. The patient details will default if you have navigated from the **Patient Detail** screen.

3) Select the room – you can only search in one room at a time.

4) Select the booking interval by one of the following methods:-

Next Available After:	**ASAP** will search for the next available appointment;
	Use the drop down arrow to select **Weeks** and insert a number in front to look for the first available appointment after x number of weeks.
	Use the drop down arrow to select **Months** and insert a number in front to look for the first available appointment after x number of months.
	OR
Require Appointment After:	Select a date from the calendar to look for the first available appointment after that specific date.

5) Click the box alongside the option required and specify your requirements.

6) Select the appointment length.

7) Specify the patient availability.

8) Tick the **Include Emergency Slots** box if relevant.

9) Click the **Find** button to display the first suitable, available appointment.

- Click **Book** if the appointment offered is acceptable.
- If one of the other appointments on the same day is acceptable double click that slot or single click and click **Book**.
- Search again if all appointments for that day are unsuitable. You can click **forward one day**, **forward one week** or **forward one month**. At any relevant point, you can click **Previous** to return to a previous selection.

10) When a suitable appointment has been selected, confirm the appointment:-

<u>For a single appointment</u>

Click on the **Further Appointment** box to remove the tick and click **Book Appointment**.

<u>For a series of appointments</u>

- If a further appointment is required for the same patient(s), leave the tick in the **Further Appointment** box and click **Book Appointment.**
- Remember to change the room if applicable. You can reset the date to start looking from today's date instead of from the previous appointment by clicking **Reset**.
- Remove the tick in the **Further Appointment** box before clicking **Book Appointment** for the last appointment in the series.

11) Once the last appointment has been booked, a list of the relevant appointments will be displayed for you print or to confirm to the patient.

BOOKING A TREATMENT PLAN

See notes on page 39.

EDIT OR RESIZE AN APPOINTMENT

1) Right click the appointment and select **Edit Appointment**.
2) Make the necessary changes and click **Confirm Changes**.

CANCEL/CANCEL AND REBOOK AN APPOINTMENT

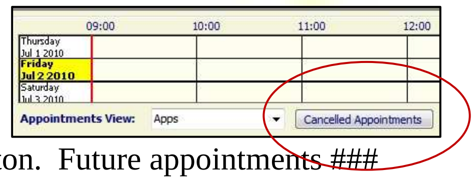
Right click the appointment and select:-

- **Cancel** – to cancel the booking; OR
- **Cancel and Rebook** – to cancel the existing appointment and rebook for another date and/or time. If you select this option, original appointment details will be redisplayed when you double click the new appointment slot. At the **Are you sure** prompt, click **OK** to move the appointment or **Cancel** if you change your mind and wish to leave the appointment in its original position.

NOTES:

If you can see the existing and new appointment slots on the screen at the same time, you can drag the appointment from its existing position and drop it into its new position.

You can view a patient's future appointments from the **Patient Detail** screen. If you click one of these appointments, the appointment slot will be displayed in the appointment book ready for you to edit or cancel, if required.



You can view a list of cancelled appointments by clicking the **Cancelled Appointments** button on the appointment book viewer. You can restore appointments by clicking on one of the entries and clicking the **Restore Selected** button. Future appointments ###

ATTENDING APPOINTMENTS

Express registered patients will need to have their appointment details updated before their appointments can be marked as attended.

If you are using a waiting list, right click the appointment and select **Send to**. Select the relevant list and the patient will be added to that list and the appointment marked attended. Once attended, the colour of the appointment will change depending upon your chosen colour scheme. (The **Navigate** option when selected from the waiting list, will mark the appointment as completed.)

It is possible to manually mark appointments in the appointment book as attended, even if you choose not to use a waiting list. If you are using lists, however, this option is not normally activated otherwise someone may inadvertently mark an appointment as attended but not put the patient onto the waiting list.

If you are not using a waiting list, appointments can be marked attended and completed as follows.

Mark an Appointment Attended

Right click a slot and select **Mark Attended**.

Mark an Appointment Unattended

Right click a slot that has already been marked as attended and select **Mark Unattended**.

Mark an Appointment Completed

Right click a slot that has already been marked as attended and select **Mark Completed**.

Mark an Appointment Incomplete

Right click a slot that has already been marked as completed and select **Mark Incomplete**.

NOTES: If you have marked the wrong appointment both as attended and complete, you would need to mark it as incomplete first before you would be able to mark as unattended.

DOUBLE BOOK AN APPOINTMENT

1) Right click the appointment slot and select the **Double Book** option.
2) Enter the relevant details and click **Book Appointment**.
3) Both appointments will be displayed side by side.

EMERGENCY, MEETING AND BREAK SLOTS

Slots can be blocked off for emergency appointments, meetings, or lunch/breaks. Once inserted, these slots can easily be cancelled or dragged and dropped onto alternative slots.

To block off your appointment book in this way, right click an appointment slot and select the required option. Complete the relevant details and click **Book**.

NOTE: If you set up a pattern of regular emergency, meetings or break slots, this can be copied forward throughout your appointment book.

EDIT AN EMERGENCY, MEETING, OR BREAK SLOT

Right click the option and select **Edit**.

CANCEL AN EMERGENCY, MEETING OR BREAK SLOT

Right click the option and select **Remove**.

MOVE AN EMERGENCY, MEETING OR BREAK SLOT

Can be dragged and dropped to a new time.

BOOK INTO AN EMERGENCY SLOT

Patients can be booked into emergency slots if this becomes necessary.

1) Right click the emergency slot and select the **Book Appointment** option.

2) Enter the relevant details and click **Book Appointment**.

The emergency slot and the appointment will be displayed in the same way as a double booking, ie with both the original emergency slot and the appointment being displayed alongside each other.

MEDICAL HISTORY

The medical history questionnaire is user-definable. You are able to specify whether a question is critical and whether you require additional information to be recorded for a particular condition. Once this has been configured, medical history can be entered from the **Patient Details** screen.

MEDICAL HISTORY ALERTS

If the patient answers **Yes** to a critical condition then, once saved, a warning will be displayed when you next view the patient details.

- If the medical history has been entered but with nothing abnormal detected, a green tick will be displayed on the **Medical History** tab.

- If the patient has answered **Yes** to at least one question but no critical condition has been recorded, a blue tick will be displayed on the **Medical History** tab.
- If the medical history has never been entered for this patient, then no symbol will be displayed on the **Medical History** tab.

CONFIGURING MEDICAL HISTORY

The medical history questionnaire is user-definable. You are able to specify whether a question is critical and whether you require additional information to be recorded for a particular condition.

MEDICAL HISTORY QUESTIONNAIRE

Questions can be broken down into two sections – main question and sub items , eg:-

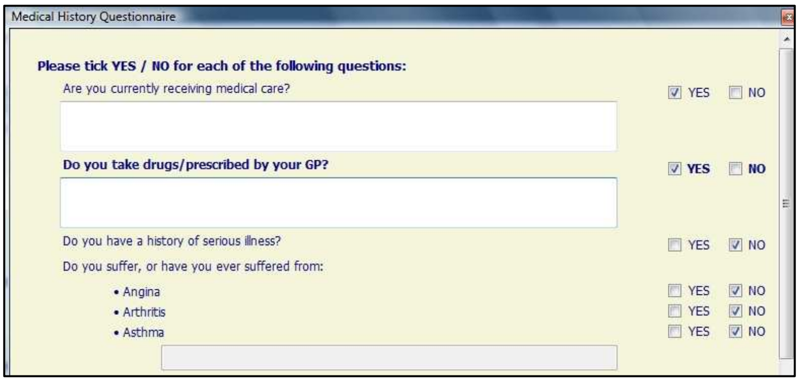
<u>EXAMPLE 1</u>

Main Question only Are you currently receiving medical care?

<u>EXAMPLE 2</u>

Main Question Entry Do you suffer, or have you ever suffered, from any of the following:-

Sub Item Entries Angina?
Arthritis?
Asthma?



When entering medical history, main sections with no sub sections will have the **Yes/No** boxes alongside the main question. If sub sections are included, the **Yes/No** box will only appear alongside the sub questions.

To Create your Questions:-

1) Select **Medical History** from the **Maintenance** menu.

2) Make sure that the **Add Question** tab is selected.

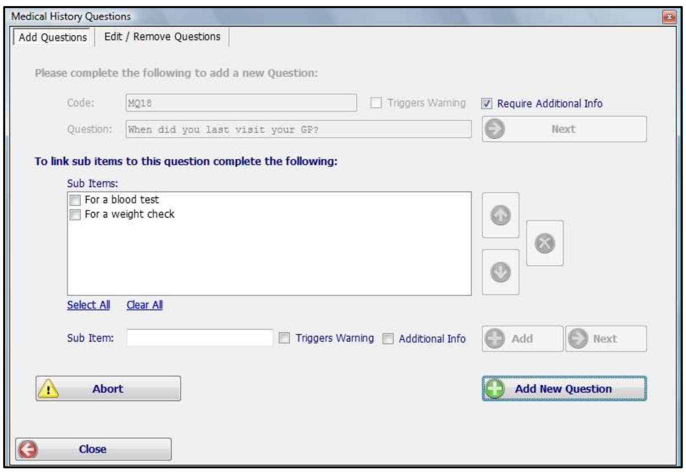
3) Each question should be allocated a code – ie MQ1, MQ2, etc. Type the code for the first question in the **Code** box (you will be able to sort the questions into a different order once they have been created).

4) Tick the **Trigger Critical Warning** and **Require Additional Info** where appropriate.

5) Type the text for the question in the **Question** box and click the **Next** button.

6) The cursor will then move to the sub section. If this section is irrelevant, click the **Next** button and click the **Add New Question** button.

7) To add a sub section to a main section, click on the small sub section box and type in the text, tick the **Trigger Warning** box if applicable, and click **Add.** Continue adding sub section text until all entries relevant have been made and then click **Next**.



8) Click **Add New Question** to save the entry.

9) You can then continue to add entries to the main and sub sections as outlined above. The sub items can be resorted by clicking on the item to be resorted and clicking the up or down arrows accordingly.

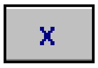
10) When you have completed all of the entries, click **Close**.

To Edit or Delete Questions

11) Select **Medical History** from the **Maintenance** menu and click the **Edit/Remove Questions** tab. The top section of the screen displays the main questions and the lower half of the screen displays the sub items – where relevant.

12) Click on the question to be edited or deleted. If there are sub items for the selected question, they will be displayed in the lower display box.

13) To delete the question (together with any sub sections) click the **Delete** button alongside the relevant question.



14) To delete a sub item, click the item to be deleted and click the **Delete** button alongside the relevant sub section.

15) To edit a question, click the question and edit the text in the **Edit selected question** box and click the **Update** button.

16) To edit a sub item, click the sub item and edit the text in the **Edit selected sub item** box and click the **Update** button.

To Add a New Sub Item to an Existing Question

17) Select **Medical History** from the **Maintenance** menu and click the **Edit/Remove Questions** tab.

18) Click on the relevant main question.

19) Type the text for the new sub item into the **Add New Sub Item** box and click the **Add** button.

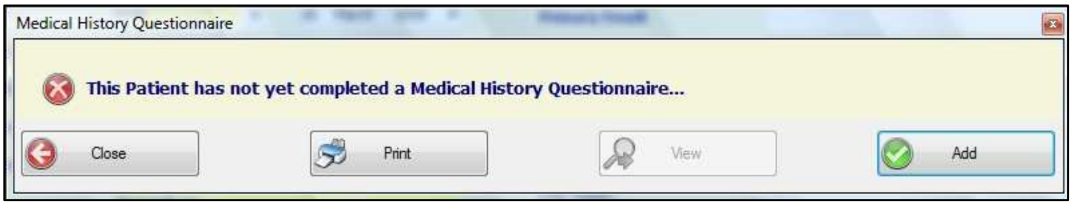
20) This will be added to the bottom of the list. You can re-sort by clicking the item and clicking the relevant up/down buttons.

21) When the medical history questionnaire is complete, click the **Close** button.

RECORDING MEDICAL HISTORY

Medical history can be viewed, added or edited either from the **Patient Details** screen or from the **Charting** screen.

1) To record medical history for the first time, click the **Medical History** tab on the **Patient Details** or **Charting** screen. The following **Options** screen will be displayed. The **View** option will be disabled until there is medical history to view.



2) Click the **Add button**.

    - If you have accessed medical history from the **Patient Details** screen, you will be asked to confirm your user details. Select your name from the drop-down list and click **Confirm**.

    - If you have accessed medical history from the charting screen, the user will default to the user entering the work.

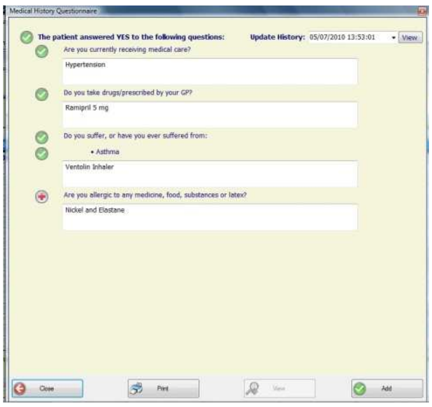
3) Complete the questionnaire – the information boxes will not become active unless you first click the **Yes** box. When complete, click the **Add** button.

    - Click **View** to view a summary of the medical history – see overleaf.
    - Click **Add** to add more history.
    - Click **Print** to print a blank or completed questionnaire (see page 16).
    - Click **Close** to close the screen.

Note: A user permission exists to allow users to view or edit medical history.

VIEWING PREVIOUS MEDICAL HISTORY

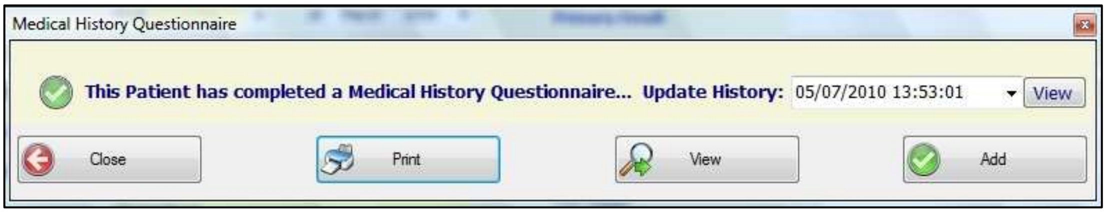
If you access medical history after previous entries have been saved, the same prompts will appear as when you first added medical history, except that now the **View** option will be enabled. If you select this option, the summary screen will be displayed. Each time that an addition or an amendment is recorded in the medical history, the time and date of the changes are recorded and displayed at the top of the summary screen. The **Update History** field always displays the date and time of the most recent changes.



You can view these changes from the medical history summary screen by selecting the relevant date from the **Update History** field and clicking the **View button**. Changes are also stored in the patient's journal, although not displayed by default. If you wish to display medical history changes in the patient's journal, click the **Exclude Medical History** box to remove the tick**.**

TO UPDATE MEDICAL HISTORY

1) To update the history once it has been saved, click the **Medical History** tab and the following options screen will be displayed.



2) Click the **Add** button and, if prompted to confirm the user, select your name from the drop-down list and click **Confirm**.

3) Make the changes and click the **Add** button.

4) The **Update History** field will be updated with the current date and time.

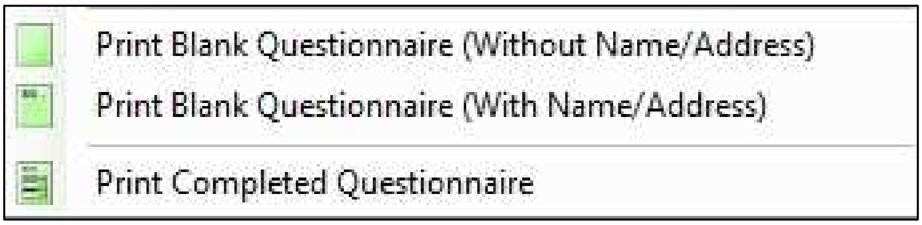
Notes:

- If you click the **Add** button without making any changes, the date and time will be recorded but, if you view these changes, a message will be displayed that no medical history changes were recorded during this update.
- The **Update History** field will not be updated if you click the **Close** button.

PRINTING MEDICAL HISTORY

1) When you click the **Medical History** tab, either from **Patient Details** screen or the **Charting** screen, you will be offered the following options to print a medical history questionnaire.

2) Select the relevant option from the **Print** menu.



WORK ENTRY/CHARTING NOTES

The work entry screen can be accessed from:-

1) the **Treatment Plan** option on the dental system toolbar;
2) the **Work** tab on the patient record; or
3) your **Dentist Waiting List**.

NOTE: If you are using **Lists**, you can configure your lists to allow you to navigate from an entry on a list either to the patient record or directly to the work entry screen. You can right-click any entry on a list and select the relevant navigate option.

TREATMENT PLAN SESSION SELECTION SCREEN

The first screen displayed is the **Treatment Plan Session Selection** screen.

- If you have accessed this option directly from the dental system toolbar, the **Patient Search** screen will be displayed ready for you to search for and select the relevant patient.
- If you have accessed this option from the **Patient Details** screen, then the patient's details will already be displayed in the **Patient Selection** section.

Base Chart

If this is the first time that you have seen this patient, then the **Base Chart** option will be selected by default ready for you to chart dental history.

Start New Plan

If there is already a base chart but no open course of treatment for this patient, then the **Start New Plan** option will be selected by default.

Edit Existing Plan

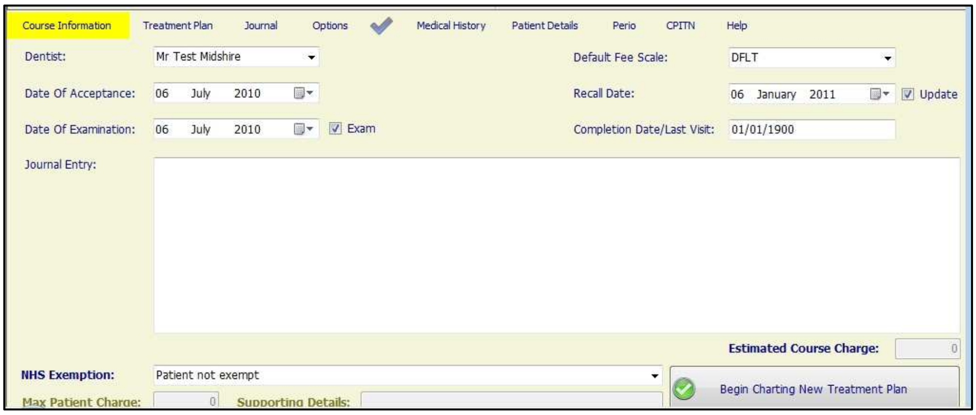
If there is already a course of treatment open, then the **Edit Existing Plan** option will be selected by default. You can overwrite the default option if required.

Any existing journal entries will be displayed in the **Journal** box.

Continue

Select your required **Treatment Plan Session** option and click the **Continue** button and the **Course Information** tab will be displayed, ready for completion.

COURSE INFORMATION SCREEN – BASE CHART



1) **Dentist** - The patient's default dentist will be selected. This can be changed if required by selecting an alternative dentist from the drop-down list.

2) **Date of Acceptance** – This is the date that will be recorded against the course history.

3) **Journal Entry** – Again, any existing journal entries will be displayed. You can record a new entry in the patient's journal at this stage in the **Journal Entry** box – type in free text - with word-wrap facility.

   JOURNAL NOTES:

   - As you complete work, an entry will be automatically written to the patient's treatment journal. Manual notes can also be added and images linked. These entries will be dated and time stamped.
   - For speed of display, only the last 12 months will be displayed by default. You can remove this filter by clicking on the filter box beneath the journal display to remove the tick.
   - Courses are separated by a horizontal line.
   - The journal can be further filtered, by course, by selecting the course required from the **Filter Journal by Course** box.

4) **NHS Exemption and Max Charge** – Not applicable at this stage.

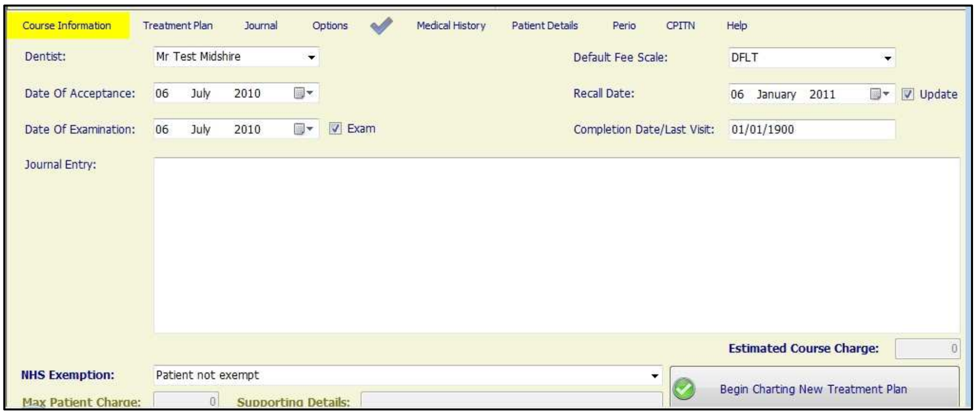
5) Click **Begin Base Charting Session**.

6) The **Options** tab will be selected ready for you to begin charting the patient's dental history. (See page 21 for charting instructions.)

7) When the base chart is complete, click either:-

   - **Save and Exit** if you are just charting the base chart and not continuing to chart a new course of treatment; or
   - **Save and Start New Treatment Plan** if you wish to chart a new course of treatment.

Course Information Screen – Start New Plan



1) **Dentist** – Select the dentist carrying out the work for this visit from the drop-down list. This will default to the **Default Dentist** specified on the patient details screen, but can be changed if applicable.

2) **Default Fee Scale** – Displays the default fee scale that has been recorded on the patient record. It can be changed if applicable.

3) **Date of Acceptance/Date of Examination** – Displays today's date by default but can be changed if applicable.

4) **Exam -** This box will be ticked by default. If it is left ticked, an examination will be added to the work entry screen by default. If you remove the tick (by clicking on the box) an examination will not be added to the work entry screen.

5) **Recall Date** - Each time that you start a new course of treatment **after** the patient's current recall date, the recall date will be updated as per the **Interval** specified on the **Patient Details** screen. In these circumstances this new recall date will be displayed on this screen, which can be edited manually if required.

   Each time that you start a new course of treatment **before** the patient's current recall date, then the recall date will not be automatically updated and the current recall date will be displayed on this screen. In these circumstances, however, there will be an **Update** box available that you can tick to manually update the recall date if required. The recall date can be edited manually at this stage if required.

   Notes:

   - It is possible to specify that you wish your recalls to update based upon the completion date of a course instead of the acceptance date. In these circumstances, the date will still roll on when you start a course of treatment, but it will be updated again when you complete the course. As you complete a course of treatment, this final recall date will be displayed for acceptance. This new date can be edited manually at this stage.
   - The recall date can be edited manually at any stage from the **Patient Details** screen.

6) **Estimated Charge** – This field will be updated as pending work is added to the treatment plan.

7) **NHS Exemption/Max Charge -** These fields will be inactive unless the fee scale is set to NHS. For an NHS course, these fields will display whatever is stored on the patient

details screen. They can be edited, however, if necessary. The maximum charge will only become active if a partial exemption code has been entered.

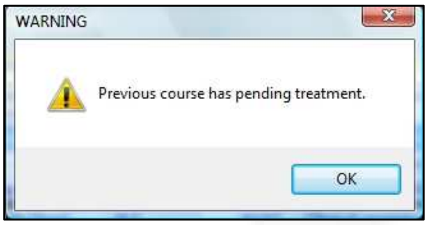
8) Click **Begin Charting New Treatment Plan**. This will display the **Treatment Plan** tab, ready for you to begin the course. (See page 21 for charting instructions.)

EDIT EXISTING PLAN

1) If there is a pending course of treatment for the patient, on the **Treatment Plan Session Selection** screen, **Edit Existing Plan** will be highlighted – defaulting to the most recent open course of treatment.

2) Click **OK** to continue with the outstanding treatment.

NOTE: You can choose to edit a previous course by selecting the relevant course from the drop-down box or choose to start a new course by clicking the **Start New Plan** button.



3) Previous journal entries will be displayed on the journal display screen.

4) Click **Continue**. This will display the **Treatment Plan** tab, ready for you to continue adding work. (See page 21 for charting instructions.)

CHARTING

These charting options are available from:-

- the **Options** tab when charting a **Base Chart** or
- the **Treatment Plan** tab when charting a course of treatment.

From this screen, you can:-

- produce and print an estimate for pending work and subsequently mark this work as completed as the work is carried out; and/or
- configure a treatment plan that can be used to book appointments.

As work is completed, the system will generate a charge to the patient, invoices can be printed, payments recorded and receipts printed. An aged debt report is maintained and statements can be sent to patients who have accounts outstanding.

TOOTH NUMBERING

You can choose to number the teeth in one of two methods:-

5) Palmer Tooth Notation

6) FDI Tooth Notation

Select the **Treatment Plan** tab from the **Administration** menu**/System Maintenance/ Application Preferences** to save your preferred notation method.

Supernumerary Teeth

On the **Base Chart**, you can select to display up to 4 supernumerary teeth.

Supernumerary: 1 adds UR9 to the chart
2 adds UL9 to the chart
3 adds LR9 to the chart
4 adds LL9 to the chart

TOOTH SELECTION

There is an option that allows you to specify which tooth will be selected by default when a chart is displayed (**Administration** menu/**User Accounts**/**User Preferences**/**Charting** tab). Subsequent teeth can then be selected either by using the keyboard or by clicking with the mouse.

Keyboard Selection

Use the arrow keys on the keyboard to move between teeth.

Mouse Selection

Click with the left mouse button to select the required tooth.

EXAMINATION

If the **Exam** box has been left ticked on the **Treatment Course Details** screen, then an examination will be added to the pending work screen by default.

Depending upon how your work code for an examination has been configured when adding your fees, this may be for a specific fee, in which case the full fee code and the relevant charge will be displayed.

If, however, you have specified that you wish to choose which examination fee is to be charged, rather than to default to a specific fee, then you will be prompted to choose which fee is to be charged. Select the relevant fee from the drop down list provided. and click the **Update** button.

UPDATING THE CHART

The patient’s chart can be updated by:

- selecting the tooth and then either by right clicking on the tooth and selecting an option from the menu; or
- by a key press once the relevant tooth has been selected (see table below for a list of key presses).
- You can also update the chart using the **Treatment Toolbox** (see notes on page 23).

Some options generate a charge and some just update the display.

NOTES:

- Press the **Delete** key to undo the last action on that tooth. Continue pressing the **Delete** key to undo previous actions. You can also right click on the tooth, select **Undo** and select which action to undo.
- **Materials, Colours and Surfaces –** allow you to assign specific materials, colours and surfaces to a fee code.

Chart Display Options Only

Any of the following options added to a base chart will, of course, not generate a charge.

ACTION	CHARTING KEY PRESS	DISPLAY
Distal/ Mesial Movement and Distal/ Mesial Rotation	+ _) (	An arrow will be displayed indicating the direction of the movement, the length of which will vary according to the distance entered on the **Movement Distance** prompt.
Unerupted/Partially Erupted and Erupted	E	Each time that you hit the letter E, the display toggles between these 3 status levels.
Fracture	F	The letters FR will be displayed above upper teeth and below lower teeth.
Root Present	R	Shades the tooth in yellow.
Watch	W	Puts a coloured border around the tooth. Displays a text box so that you can record the reason for watching the tooth (optional). Click the tick symbol to save the text entry. Click the cross to cancel.
Toggle Permanent/ Deciduous	! ?	Toggles between permanent/deciduous tooth notation. Any treatment recorded against a deciduous tooth will be removed from the display of the permanent tooth but you will still be able to view the history of the deciduous tooth in a previous course.

Chart Display Plus Charging Options

As outstanding work is charted on a current course of treatment, a line entry will be added to the estimate and this will be displayed in red to show that it is outstanding. As the work is completed, the colour of that line of text will be changed to blue.

Before the work is added to the estimate, you will be prompted to select a fee code from the list of codes linked to the relevant work code. If only one fee exists for that work code - or if you have selected a specific default fee code for that work code - then that fee code will be automatically added to the **Treatment Plan** screen.

If more than one fee code is available for that work code, you will be prompted to select the relevant fee code from the drop down list.

Fee codes can be changed once they have been added to the treatment plan scheme by double clicking the relevant line on the plan and choosing an alternative fee from the drop down list. Only the fees linked to that work code will be offered for selection. The fee scale and/or price can be edited in the same way.

KEY PRESS	WORK CODE	DESCRIPTION
A	A	Artificial Tooth - (can only be charted on missing teeth)
B	B	Bridge Retainer
C	C	Crown
I	I	Implant
P	P	Bridge Pontic - (can only be charted on missing teeth)
T	RT	Root Canal Treatment
S	S	Fissure Sealant
V	V	Veneer
X	X	Extraction
1-9	F	Fillings

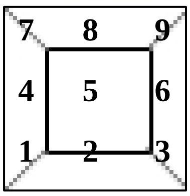
Charting Fillings

You cannot right click to chart a filling as you need to specify which tooth surfaces are being filled. You should either use the numeric keypad or the **Treatment Toolbox**.

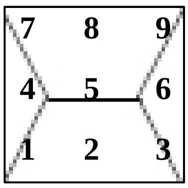
__Numeric Keypad__

You can use the numeric keypad to specify the filling surfaces. The system will recognise the relevant surface depending upon which tooth has been selected.

Pre-Molars/Molars



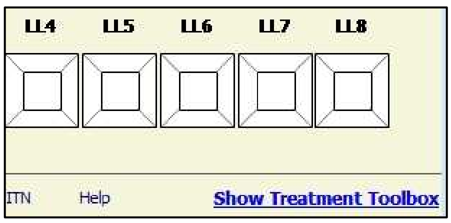
Incisors/Canines

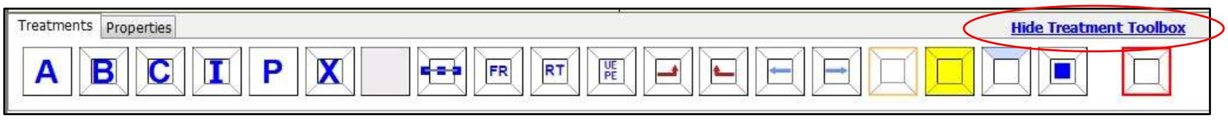


Press the relevant numeric key to represent the surface to be filled and press **Enter**. If there are multiple surfaces in one filling, press the numeric keys for all of the surfaces first before pressing the **Enter** key – this will join the surfaces together and compress the treatment lines on the estimate to one line. If you are charting a single surface filling, press the relevant number key for the surface to be treated and press the **Enter** key.

Treatment Toolbox

1) Click the **Show Treatment Toolbox** link just below the chart.





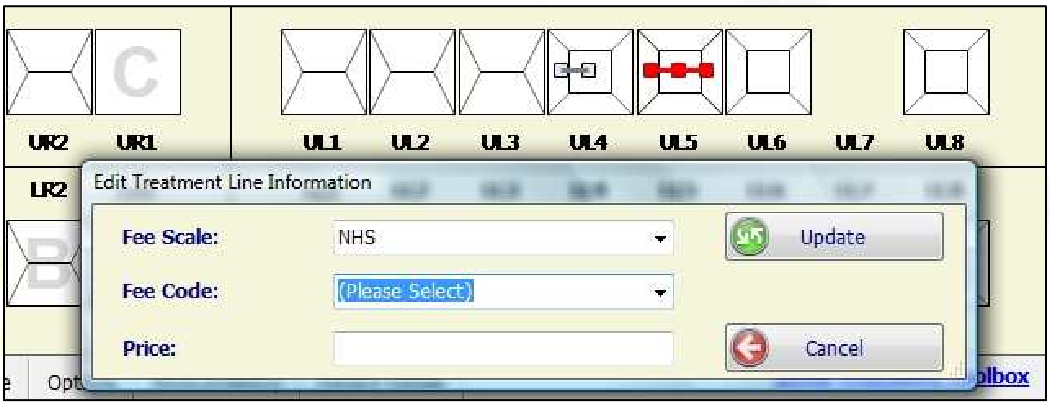
Note: Tool Tips, which are small windows that show descriptive text, will be displayed when you rest the pointer on one of the options on the toolbar.

2) To add charting options from the toolbar to the chart, you can:

- Drag an option from the toolbar and drop this directly onto a tooth.
- Click on an option and click on a tooth.
- Click on an option, hold down the **Ctrl** key, click multiple teeth and then release the **Ctrl** key to add that option to each of the selected teeth.
- Click on an option, hold down the **Shift** key, click the first and last tooth on a sequence of consecutive teeth and then release the **Shift** key to add that option to the first and last tooth and all of the teeth in between.

Selecting the Fees

1) The **Edit Treatment Line** box will be displayed, ready for you to select the fee that you wish to charge.



This will display only the relevant fees for the work code. If you have filled in the **Surfaces** field on the fee details, then, for fillings, it will also restrict the search for those fees with the relevant number of surfaces or those where no surface numbers have been specified.

2) Check that the correct **Fee Scale** is displayed and choose the code from the **Fee Code** drop-down list.

3) The usual price for that fee will be displayed – this can be edited if required.

4) Click the **Update** button.

5) A treatment line will be added to the estimate for the item of work.

Adding Non-Chartable Work

1) Click the **Add Manually** button.

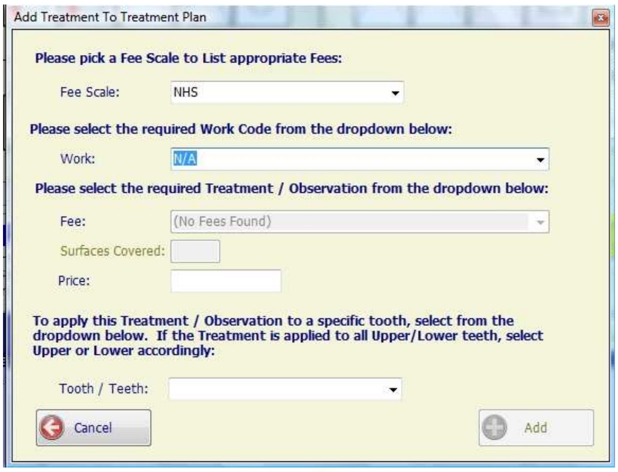
2) Check that the correct **Fee Scale** is displayed and select a work code from the **Work** drop-down list.

3) Select the fee code from the **Fee** drop-down list.

4) The **Surfaces Covered** field will be completed where applicable.

5) The usual price will be displayed – this can be edited if required.

6) Select the tooth notation from the drop-down list or type this in if preferred.



7) Click the **Add** button.

8) A treatment line will be added to the estimate for the item of work.

Re-ordering Lines of Treatment

The order in which pending work is displayed on the screen can be re-sorted by clicking on the treatment line to be moved with the left mouse button, holding down the left mouse button and dragging it to the required position.

If you plan to use the treatment plan to book future appointments, then all completed work should appear before any pending work. Completed work cannot be re-sorted so the work should be re-ordered before you start marking treatment as complete.

Marking Treatment Complete

All work added remains pending until you mark it as completed unless you have selected the **Auto Complete** option on the **Work and Fee Codes Configuration** screen. Pending work is displayed in black and completed work is displayed in blue.

To mark individual lines of treatment as completed, left click the relevant line of treatment to highlight it and then right click and choose the **Mark Treatment Complete** option.

To mark all lines of treatment as completed, left click any treatment line, right click and then choose **Complete All Items on Plan**.

You can change the status back to pending by left clicking to select the line of treatment and then right clicking and choosing the **Mark Line Pending** option.

Configuring the Treatment Plan for Appointment Booking

If you have added all pending work to the treatment plan, it is possible to use the treatment plan to book the relevant appointments required to complete the course of treatment.

If you are only recording completed work, then this section is not applicable and the visit header section can be ignored.

You will be able to use the treatment plan to manually search for the appointments or use the **Appointment Finder** option whereby the system can search for the first available appointment. For the **Appointment Finder** booking option to be most effective, your appointment rooms should be linked to a provider. You will also need to add non-chargeable treatment to the plan where this treatment requires a visit, ie you would need to add a fee for a crown prep with a zero charge to be able to book an appointment for such a visit.

Visits will be booked in the order that they appear on the screen so it is important that you re-order the lines of treatment by dragging and dropping them into the correct order before setting up the visit headers and saving the treatment plan. Completed treatment will, of course, be ignored when appointments are being booked so all incomplete treatment should be moved to the bottom of the plan.

Visit Headers (Visit Information)

By default, only one visit header (today) will be inserted into the treatment plan. The dentist will be the dentist specified in the **Course Information** details. The appointment length will default to the standard appointment length for the practice and the interval will be set at 1 day.

If another visit is required you should left click the first line of treatment to be carried out at the new visit and click the **Insert Visit** button. This will add a new visit header above the selected line of treatment.

By default, the visit will be for the same dentist and length of time as Visit 1 and with an interval of one day, which means that the first appointment offered would be the next day. These visit details can be edited by double clicking on the visit header.

Performer: A different dentist name can be selected from the drop down box.

Visit Length: This can be overtyped or you can use the up and down arrow boxes to increase or decrease the appointment length.

Booking Interval: This specifies how many days interval should be left after today (or the previous visit if you have added more than one visit) before an appointment is offered for selection, for example you can specify to leave an interval of 14 days between an appointment for a crown prep and a crown fit.

Click **Update** to save the changes.

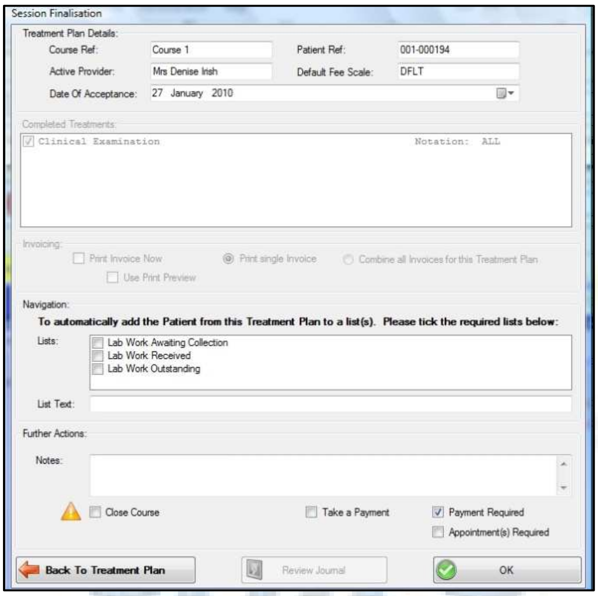
Visit headers can be removed by clicking on them and clicking the **Remove Visit** button.

You can drag and drop treatment from one visit to another. If the line that has been moved is the only treatment in that visit, the empty visit header will be deleted.

When all of the visits have been configured, click **Save and Continue**.

FINALISING THE WORK ENTRY

The following finalisation screen is displayed, ready for producing the invoice for the completed work. This screen is divided into 5 sections – (1) **Treatment Plan Details**, (2) **Completed Treatments**, (3) **Invoicing**, (4) **Navigation** and (5) **Further Actions**.



Treatment Plan Details

This section is displaying the treatment details. The only field that you can edit in this section is the **Date of Acceptance**. This is the date that will appear on the invoice and can be edited if you are entering work that was carried out on a previous date.

Completed Treatments

Each fee will be listed on this section with a tick box to the left of each fee. This tick box will be ticked by default.

If you leave the ticks in place, when you click **OK**, one invoice will be raised to include all items of treatment carried out at this visit only. You would choose this option if you wanted to invoice the patient separately for each visit.

If you remove the ticks, (click once to select the treatment and again to remove the tick) the work will be held over until the patient next attends. When you enter further work and return to this screen, all items of treatment carried out at both visits will be displayed, with ticks once again defaulting alongside each item. If you leave the ticks in place, when you click **OK,** one invoice will be raised to include all items of treatment carried out at both of the visits. You would choose this option if you wanted to raise only one invoice for multiple visits.

Invoicing

This section controls the printing of invoices. You can choose to print the invoice from this screen – but if you choose not to, you can still print the invoice from the **Financial tab** when taking a payment.

Tick the **Print Invoice Now** box if you wish to print an invoice and select the relevant print option.

or

Tick the **Use Print Preview** box if you wish to preview the invoice. You can print the invoice from the print preview display

and select one of the following options:-

Print Single Invoice – will print only the invoice for the items of treatment that have just been ticked in the **Completed Treatments** section and will not include any items of treatment that were completed in a previous visit.

Combine all Invoices for this Treatment Plan – will produce a consolidated printout of all invoices for treatment completed during this visit, and previous visits, for this course.

Navigation

Lists

This section allows you to add the patient to one or more of your lists. If you wish to do so, tick the relevant list/s. You can add list text by typing the text in the **List Text** box.

Further Actions

Notes

Any notes typed in here will be displayed on the account overview screen. It enables the dentist to send a message about this patient to reception so that it can be seen when they are taking a payment/booking an appointment.

Close Course

If all pending work has been completed you will be prompted to close the course each time the finalisation screen is displayed. This is, of course, optional depending upon the circumstances (see notes below). If you wish to close a course with treatment pending, click this **Close Course** box.

Take a Payment

To go straight to the **Financial tab** on the **Patient Detail** screen to record a payment, tick the **Take a Payment** box.

Reception will have access to an **Account Overview** screen, from which they will be able to record a payment and book appointments. The following **Payment Required** and **Appointment(s) Required** options are linked to this **Account Overview**.

Payment Required

To add a payment request to the patient's **Account Overview** screen, click the **Payment Required** box.

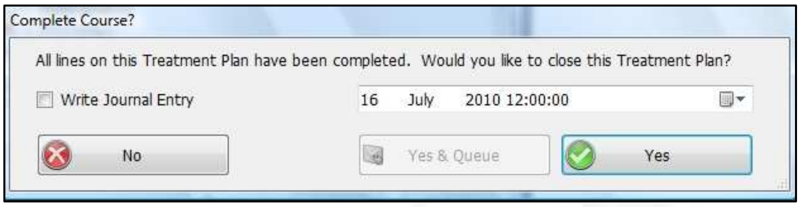
Appointment(s) Required

To add a book appointment request to the patient's **Account Overview** screen, click the **Appointment(s) Required** box.

When all of the relevant options have been selected, click **OK**.

COMPLETING THE COURSE

If all lines on the treatment plan have been completed, the following prompt will be displayed.



Select **Yes** or **No** as appropriate. (The **Yes & Queue** option is only applicable to NHS courses.) If you wish to write an entry into the journal before the course is closed, click the **Write Journal Entry** box before clicking the **Yes** button.

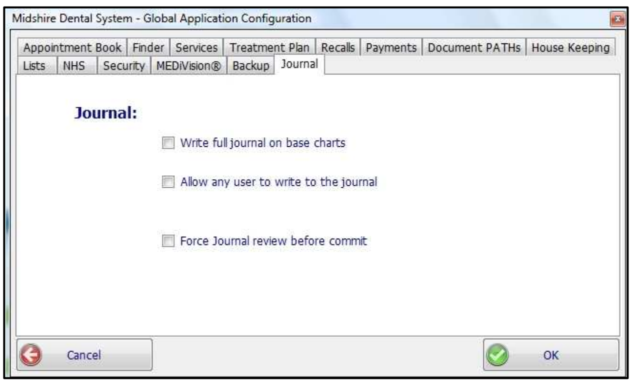
If you select **Yes** today's date and time will be recorded as the date that the course was closed, unless you edit the date by clicking the down arrow alongside the date/time display and click on an alternative date.

If your system is set to updating recall dates upon completion of a course and not the start of a course, the updated recall date will be displayed. You will be able to edit this date manually before accepting. ###

JOURNAL

Journal Options

Administration menu/**System Maintenance**/**Application Preferences**/**Journal** tab.



- **Write full journal on base charts**. If this option is selected, all charted work on the base chart will be written to the journal. If not selected, a line will appear in the journal that the base chart has been completed.
- **Allow any user to write to the journal**. If this option is not selected, the only users offered when the **View** or **Edit Journal** option is selected from the **Patient Detail Screen** would be those where the **Type** field was saved as **Principal**, **Associate**, **Therapist** or **Hygienist**. If this option is selected, the full list of users would be offered.

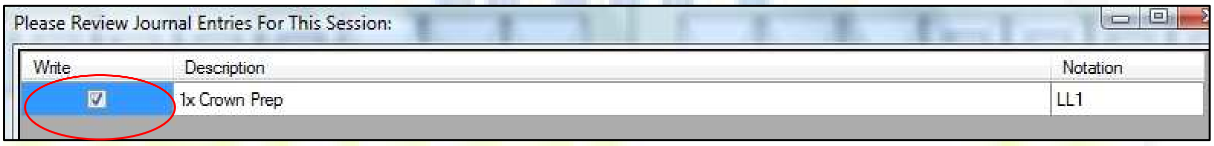
Even if all users are included, you can still limit who has the ability to view or edit the journal by activating the relevant user permissions to **View Journal** and/or **Add to Journal**.

- **Force journal review before commit**. If this option is selected, the journal will be displayed automatically when you click **Save and Continue.** If not selected, it will not be displayed by default, but you can choose to view the journal by clicking the **Review Journal** button on the **Session Finalisation** screen.

Editing and Adding to the Journal when Charting

Each item of completed work will by default be written to the journal. You can, however, choose not to write away individual lines by clicking on the box alongside that entry to remove the tick before clicking the **OK** button.

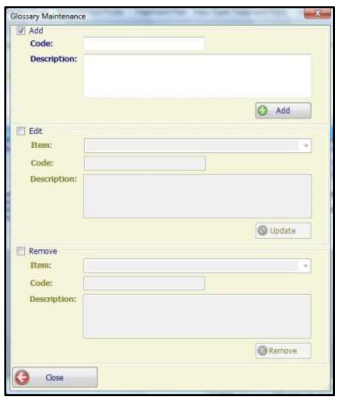
JOURNAL ENTRIES CAN BE EDITED ONLY ON THE DAY THAT THEY WERE ADDED AND ONLY BY THE USER WHO ADDED THE ENTRY.



You can also edit the default description of a journal entry by clicking on the description and making the required changes.

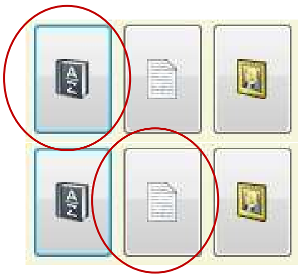
To add free text to the journal, click on the **Add Comment** box, type in the text and click the **Add to Journal** box.

Journal Glossary



You can create journal glossary entries for commonly used phrases.

1) Select **Glossary** from the **Maintenance** menu and leave the **Add** box ticked.
2) Type a code in the **Code** box, enter the text in the **Description** box and click **Save**.
3) You can edit an existing entry by clicking the **Edit** box, amending the text and clicking the **Update** button.
4) You can delete an existing entry by clicking the **Remove** box, selecting the entry to delete from the drop-down list and clicking the **Remove** button.

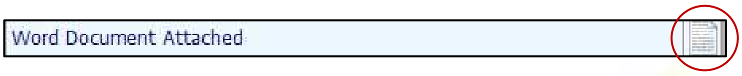


To add a glossary entry to the journal, click the **Glossary** button on the edit journal screen, select the glossary item and click **OK**.

Linking Documents

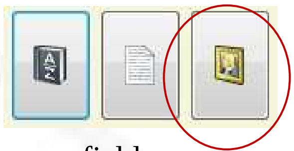
To link a document to the journal, the document must be saved on the server in a location that is available for browsing from the dental system.

1) Browse to the location.
2) Select the document type from the file type box to the right of the **File name** box.
3) Either double click the document in the file display screen or select the document from the **File name** box and click the **Open** button.
4) At the **Add to Journal?** prompt, click the **Yes** button.
5) An entry will be written to the journal with a document logo displayed alongside it.



6) To view the document, double click the left mouse button anywhere on that line entry.

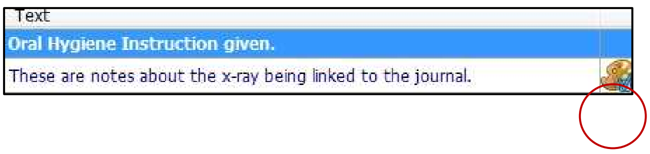
Linking Images



To link an image to the journal, the image must be saved on the server in a location that is available for browsing from the dental system.

1) Click the **Image Link** button.
2) On the browse screen, click the **Browse** button to the right of the **Image** field.

3) Search for and select the image and click the **Open** button. This will display the path of the image in the **Image** field.
4) Select the tooth notation from the drop down list in the **Tooth** field. The **Performer** will default to the dentist carrying out the treatment for the current visit.
5) Select the type of image being linked from the drop down list in the **Image Type** field.
6) Add any notes that might be relevant to the image in the **Notes** text field and click **OK**.
7) An image logo will then be displayed in the journal, alongside any relevant notes.



8) To view the image, double click the left mouse button anywhere on that line entry.

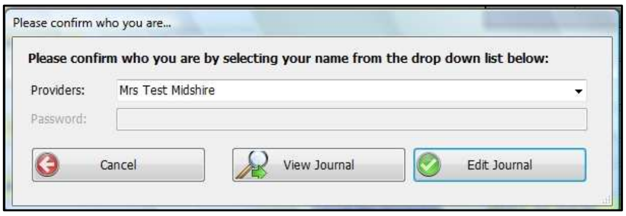
All journal entries from the charting screen will automatically be recorded against the dentist who has carried out the treatment for that visit.

Viewing and Editing the Journal from the Patient Details Screen

The journal can also be viewed and edited from the **Patient Detail** screen.

1) Display the **Patient Details** screen and click **Journal**.

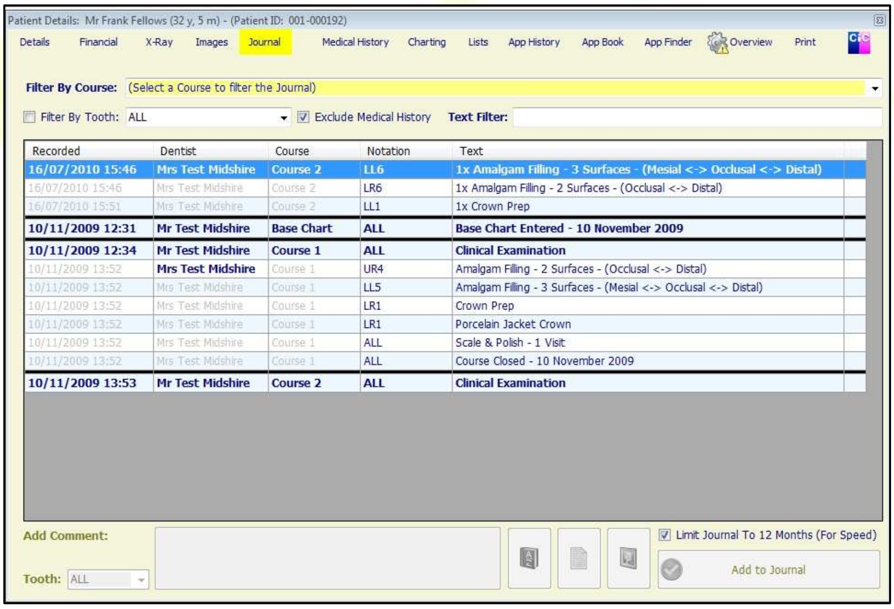
2) The system will prompt for a user name as follows:-



Select the relevant user from the drop down list and select either **View Journal** or **Edit Journal**. User permissions to view or edit the journal will become effective when selecting these options for that user.

By default, the user list will display only those users where the **Type** field on the **User Account Maintenance** screen is recorded as **Principal**, **Associate**, **Therapist** or **Hygienist**. You can, however, choose to display all users in this drop down box – see **Journal Options** on page 30.

Viewing the Journal



By default all entries for the last 12 months will be displayed – with the exception of medical history notes. Medical history notes can be included – see below – and you can remove the tick from the **Limit Journal to 12 Months** box if you wish to view older entries.

- You can filter by course. Select the relevant course from the drop down list.

- You can filter by tooth. Click the box and select the tooth from the drop down list.

- You can include medical mistory by removing the tick in the **Exclude Medical History** box.
- You can filter by text by typing some text in the **Text Filter** box. As you type, only the entries matching your text will be displayed.

The following information will be displayed for each entry.

Date and time recorded
Dentist who carried out the work
Journal description text

Course of treatment
Tooth notation

<u>Editing the Journal</u>

JOURNAL ENTRIES CAN BE EDITED ONLY ON THE DAY THAT THEY WERE ADDED AND ONLY BY THE USER WHO ADDED THE ENTRY, PROVIDING THAT USER HAS PERMISSION TO EDIT THE JOURNAL - USER PERMISSION: CAN EDIT JOURNAL (WHERE AVAILABLE).

When you select the **Edit Journal** option, the journal will be displayed in the same way as it is when it is viewed whilst charting. You can edit an entry – with the above restrictions – by right-clicking on the line and selecting **Edit Journal Entry** or **Delete Journal Entry,** or add new entries as outlined previously on page 30.

RECORDING PAYMENTS

If you are using the full reception system, and generating invoices for your patients, you are able to record payments. You can also produce a cashbook report to enable you to reconcile your till receipts. You can then maintain an aged debt list and send out statements to patients who owe you money.

Even if you are not using the system to record work, you can still record payments from your patients. You will obviously not be able to produce a list of debtors or send out statements, but you will still be able to print a cashbook. In these circumstances, as you record a payment, an automatic invoice will be raised for that patient, equal to the value of the payment, to maintain a zero balance on the patient's account. To use this option, you need to tick the **Payment Trigger** box on the **System Maintenance**/**Application Preferences** on the **Administration** menu.

TO SET UP PAYMENT METHODS

Payment methods can be maintained using the **Pricing\Payment Methods** options on the **Maintenance** menu.

To Add a Payment Method

Leave the **Add** box ticked, type in a new payment method and click the **Add** button.

To Delete a Payment Method

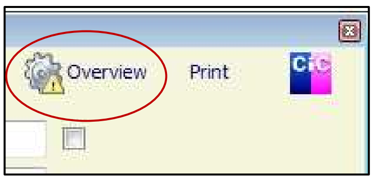
Click the **Remove** box, select the method to be deleted from the drop down list and click the **Remove** button.

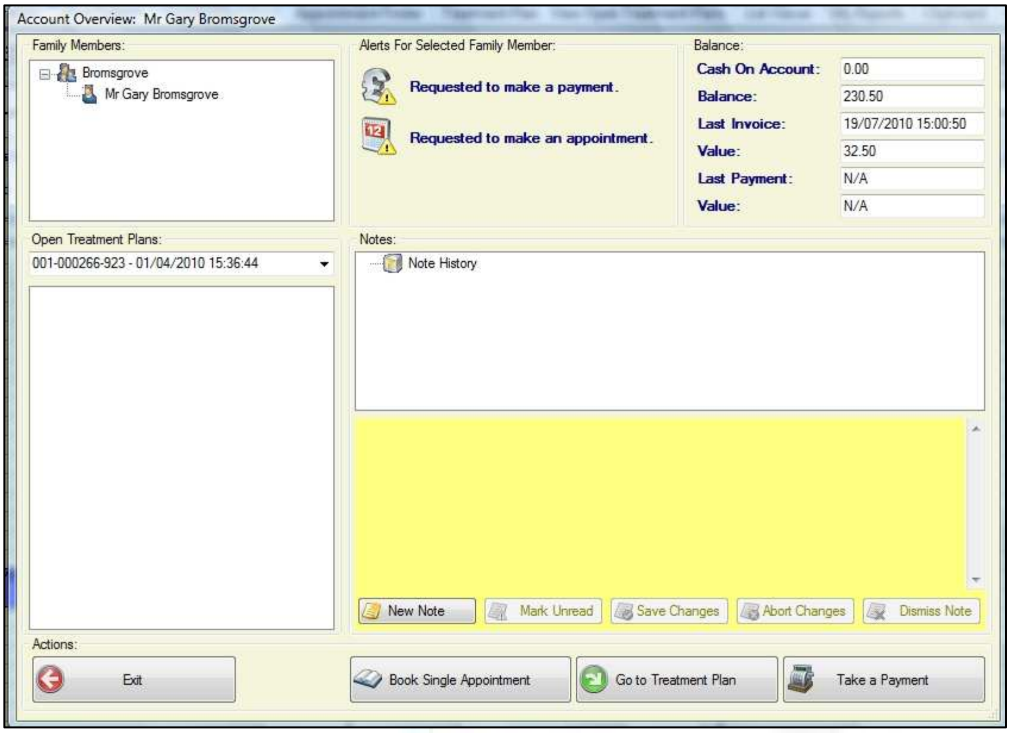
PATIENT OVERVIEW SCREEN

On the patient finalisation screen, if the **Payment Required** and/or **Appointment Required** boxes have been ticked in the consulting room, then the patient's appointment details will be updated as shown below.

This is an indication to the receptionist that the dentist has finished adding the work and that there are actions required before the patient leaves the practice. You should double-click the appointment, to see what actions are required. This will display the patient's **Overview** screen.

Note: You can also view the patient's **Overview** screen from the **Patient Detail** screen.





Family Members

All family members will be displayed in this section.

Alerts for Selected Family Member

This section shows whether the **Payment Required** or **Appointment Required** has been selected on the **Finalisation** screen in the consulting room. You can choose to select these options in any order, and you will be returned to the **Overview** screen after each action. When everything has been carried out for the patient, click the **Exit** button to close the **Overview** screen.

Balance

This section displays the account information for the patient.

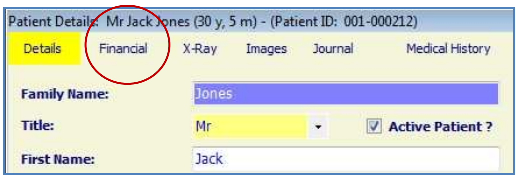
Open Treatment Plans

If an appointment is required and a treatment booking plan has been set up in the consulting room, the treatment booking details will be displayed in this section.

Notes

This section will display any notes that were added by the dentist on the **Finalisation** screen.

TO RECORD A PAYMENT FROM THE OVERVIEW SCREEN



If you are recording a payment for a patient who has not attended the practice today, then search for and display the patient's record, click the **Financial** link and click the **Record Payment** button. You can then proceed as outlined below.

If you are recording a payment from the **Overview** screen, you can either click the payment symbol on the alert section of the screen or the **Take a Payment** button in the bottom right hand corner of the screen. You will then be navigated to the patient's **Financial** screen.

Complete the payment details as follows:-

Date	The date will default to today's date but can be edited if required.
Method	Select the payment method from the drop down selection list. This will generate a summary on the cash book report of how much has been taken for each payment method. If a payment is made by more than one method, then the value for each method will need to be recorded separately.
Payment Amount	Type in the amount of the payment received, <u>excluding</u> any discount you may wish to give.
Discount	If you wish to give any discount, type in the amount to be discounted.
Amount Tendered/ Change	These fields are optional. They will allow you to type in the amount tendered. The system will then calculate and display how much change is due to the patient.
Taken by	Select the member of staff who is recording the payment from the drop down list of users. This is a must-fill field – you will not be able to process the payment until your username has been selected. You can activate a user password on this field – **Administration menu/System Maintenance/Application Preferences/Security**.
Payment for	Select the dentist/hygienist/therapist to whom the payment is to be allocated from the drop down list. This will generate a summary of the value of payments taken for each provider on the cash book report. If you are taking a payment for 2 different providers, these will need to be

<table>
<tr><td></td><td>entered separately so that the summary can be accurately calculated.</td></tr>
<tr><td>Show Inactive Members</td><td>Tick this box to include deleted users in the Payment for field.</td></tr>
<tr><td>Stock</td><td>Tick this box if you wish to record a payment for stock that you wish stock sales to be itemised separately on the cash book summary page.
The Payment Amount should be the total amount of the payment, including the stock value.
The stock value should be the total value of the stock sold.</td></tr>
<tr><td colspan="2">STK is a reserved work code and you can add your products to the fee scale, linked to this work code, as if they were fees. If any one of these products is added to the treatment screen, and you select the Take Payment option on the Treatment Plan Finalisation screen, then the value of the total payment amount (including the stock) and the proportion of that payment that relates to the stock value will be calculated automatically and displayed for confirmation. If you click OK, then the Stock box will be ticked automatically on the payment entry screen and the values will be entered for you. If you click Cancel, then the Stock box will still be ticked but you will need to type in the values manually.

Note: If you record a payment for stock that has not already been added to the treatment screen, then the payment will be processed correctly but the patient’s balance will be in credit. You will need to add the stock after the payment has been processed, otherwise the balance will incorrectly remain in credit.</td></tr>
<tr><td>Narrative</td><td>The narrative will be displayed as the description of the transaction on the payment details screen.
Payment Thank You is the default narrative for positive payments.
Refund is the default narrative for refunds. This narrative can be overwritten if required.</td></tr>
<tr><td>Open Till Drawer</td><td>This will default to being ticked if you have a till drawer that has been linked into your Dental System. You can click on this box to remove the tick if you do not wish to open the till drawer when you confirm the payment.</td></tr>
<tr><td>Print Receipt</td><td>If the Print Receipt box is ticked, a receipt will be printed. Remove the tick if you do not wish to print a receipt.

<u>Note</u>: There is a Print Receipt by Default box on the Payments tab on the System Maintenance\Application Preferences option on the Administration menu. This option determines whether the Print Receipt box will be</td></tr>
</table>

	ticked by default on the **Payments** screen.

When all of the payment details have been entered, click **Record Payment**. You will then be returned to the **Overview** screen to continue with any further options.

TO RECORD A PAYMENT FROM THE PATIENT DETAIL SCREEN

Payments can also be recorded directly from the **Patient Detail** screen. Display the patient's record, click the **Financial** link, click the **Record Payment** button and proceed as above.

FINANCIAL SCREEN

A list of all payments and auto invoices/credit are displayed on the **Financial** screen for each patient. A receipt can be printed/re-printed by clicking on the relevant payment details on this display and clicking print/reprint. Invoices can also be reprinted in the same way.

Note: There is a link on the **Financial** screen **– Frequently asked questions –** which gives guidance of how to correct or reverse payments that have been recorded incorrectly. Click this link for guidance on how to deal with such occurrences.

REFUNDS

If you need to issue a refund for a payment recorded incorrectly, record a negative payment, ie precede the **Payment Amount** with a minus symbol. If the account is in credit – ie the balance is a negative amount – recording a negative payment for that amount will return the account to a zero balance.

CREDITS

To raise a credit for a patient, display the **Financial** tab and right click on the invoice for which the credit is to be raised and select **Raise Credit**.

If you wish to raise a credit for a particular item of treatment on that credit, click the item and the amount to be credited will default into the **Credit Value** box. This value can be edited, if required.

If the credit is not for a particular item of treatment, you can just type in the credit value. Enter this as a positive value, and not a negative value.

You can print or reprint a credit note by right clicking on the line and selecting the relevant option from the menu.

TO DELETE AN INVOICE

You can activate the ability to delete invoices – user permission applies. To delete an invoice, right click on the invoice and select delete. The patient balance will be adjusted accordingly and the invoice will be moved onto the archive section of the **Financial** screen. Dental charts will not be updated if you delete an invoice for work that has been charted.

BOOKING APPOINTMENTS FROM THE OVERVIEW SCREEN

If there is a treatment booking plan in existence, the details of that plan will be displayed in the **Open Treatment Plans** section. All completed work will be displayed in green and will include the date and time that the work was completed and all pending work will be displayed in red.

To book an appointment from the treatment booking plan, click the **Go to Treatment Plan** button. To book a one-off appointment manually, click the **Book Single Appointment** option.

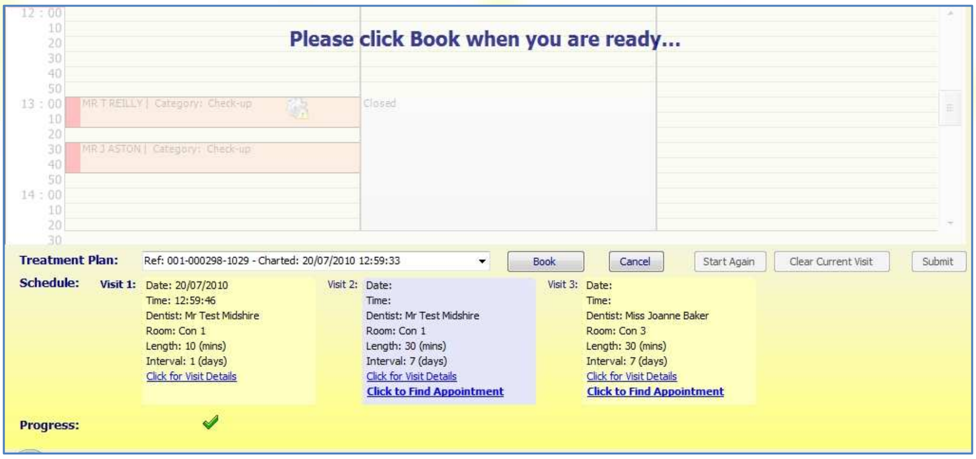
Book Single Appointment

This option will navigate to the appointment book ready for you to search for and book an appointment manually. See notes on page 7.

Go to Treatment Plan

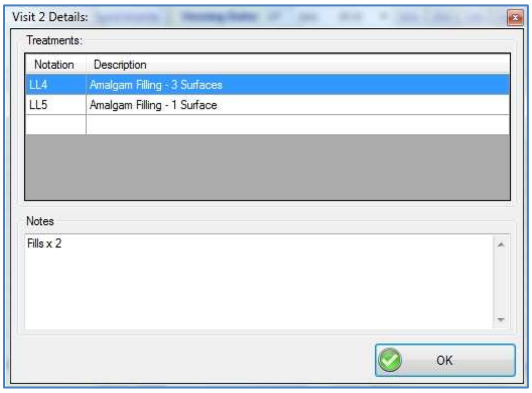
If you wish to book one or more of the appointments set up on a treatment booking plan, select this option. You will be navigated to the appointment book and the treatment plan will be displayed ready for booking.

Completed or already booked appointments will be displayed with a tick below them to show that the booking is not outstanding and the first pending appointment will be highlighted.



1) Click the **Book** button to begin the booking process.

2) The visit details for the first pending appointment will be displayed and the appointment book will take into account the booking interval and display the earliest date for that appointment . Any notes added to the **Visit Header** will be displayed in the **Notes** section. Click **OK** to remove this



display from the screen. (If you wish to redisplay this screen before beginning the booking process, click the **Click for Visit Details** link.)

3) At this point, you can either search for the appointment manually and, as each appointment is confirmed, the treatment plan will be updated with the appointment details or click the **Click to Find Appointment** link to use the appointment finder.

Manual Booking

1) Search for and confirm the appointment when prompted. On the **Confirm Appointment** screen, make sure that the **Further Appointments** box is ticked if you wish to continue booking the plan.

2) The next pending appointment will be displayed. The appointment screen will take into account the booking interval and display the earliest available date for the next appointment. You can use the movement bar (see page 7) to move to another date if required and, when you have selected a suitable slot, double click the slot, select the category for the appointment and click **Book**.

3) Continue booking the plan in this way until you have booked all of the appointments you wish to book from the plan. (You can book one appointment from the plan and leave the others pending until the next visit if you wish.)

4) When all of the appointments on the plan have been booked, or if you manually remove the tick from the **Further Appointments** box to indicate that do not wish to book any further appointments on the plan, you will be prompted to submit the treatment plan (ie save the bookings so far). Click **Yes**.

5) Any appointments on the plan not yet booked will remain pending on the plan until you choose to book them, probably at the next visit.

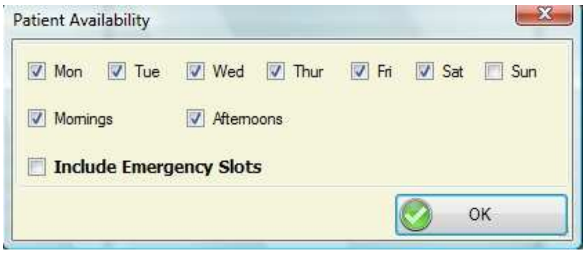
6) Once you have submitted the treatment plan, a list of all appointments booked will be displayed. Click the **Print** button to print the appointment details and/or click **OK** to remove the list from the screen.

7) You will then be returned to the **Overview** screen to continue with any further options. Click **Exit** to close the **Overview** screen.

Click to Find Appointment

1) Use this option if you wish to pass the treatment plan booking details to the **Appointment Finder**.

2) The following **Patient Availability** screen will be offered for selection.



By default, Monday to Saturday will be selected, together with both Mornings and Afternoons. If a day or morning/afternoon session is deselected, then that day or session will not be included in the search.

Also by default, emergency slots will not be included in the search. You can click the **Include Emergency Slots** box if required.

Click **OK**.

3) The details regarding the **Appointment Room, Interval** & **Length** will be passed from the **Treatment Plan** to the **Appointment Finder**. Click **Find**.

4) The first suitable slot will be displayed.

   - Click **Book** if the appointment offered is acceptable.
   - If one of the other appointments on the same day is acceptable double click that slot or single click and click **Book**.
   - Search again if all appointments for that day are unsuitable. You can click **forward one day**, **forward one week** or **forward one month**. At any relevant point, you can click **Previous** to return to a previous selection.

5) Select a **Category** for the appointment.

6) Any notes that were added to the **Visit Header** will be displayed in the **Additional Information** section.

7) Further Appointments

   - If this is the last appointment on the plan, the **Further Appointments** box will not be ticked and you will be prompted to **Submit** (ie save) the plan when the booking has been confirmed.
   - The **Further Appointments** box will be ticked by default if there is another visit included on the plan. When the appointment is confirmed the first suitable appointment will be displayed for the following visit.
   - At any point on the **Appointment Confirmation** screen, you can remove the tick from the **Further Appointments** box and you will be prompted to submit the plan. Any visits still outstanding can then be booked at a later date.

8) Click the **Book** button and you will either be prompted to submit the plan or continue to book the remaining visits.

9) At any point before you submit the plan, you can:-

   - Click **Cancel** to cancel out of the treatment plan. However, please note that if you do click **Cancel**, then all current changes will be lost from the plan (any appointments that have previously been submitted will be saved). If you want to save the bookings so far, and not continue booking the remaining outstanding visits, click **Submit** instead of **Cancel**.
   - **Clear Current Visit** to cancel the last booked visit; or
   - **Start Again** to clear all current bookings and start booking again.

10) Once you have submitted the plan, the **Appointment Confirmation** screen will display a list of all appointments just booked.

   - Click the **Print** button to print the appointments to your assigned appointment printer; or

- Click the **Print Preview** box before clicking the **Print** button to preview the printout on the screen. You can print the appointment from the **Print Preview** screen if you wish.

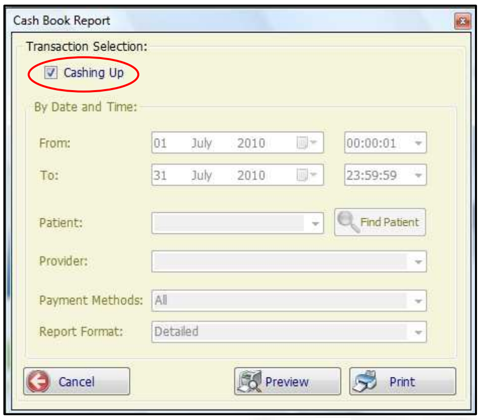
11)

REPORTS

CASHBOOK REPORT

If payments are being recorded, a **Cashbook Report** can be printed, either for reconciliation of your till receipts on a daily or other regular basis or for general reporting purposes.

To print the report, select the **Financial\Cashbook Report** option from the **Reports** menu.



Cashing Up

Each time that you print a cashbook report with this box ticked, only those transactions since the cashbook was last updated will be included and you will be offered the following prompt:-

If you click **Yes**, then those transactions just printed <u>will not</u> be included the next time that you print a cashing up report.

If you click **No**, then those transactions just printed <u>will still</u> be included the next time that you print a cashing up report.

Click the **Print** button to print the report.

You can preview the report without clearing down the outstanding transactions. To do so, click the **Preview** button. If you then click **Print** from this preview display, you will not be offered the option of clearing down outstanding transactions.

The report will produce a list of every transaction since you last cashed up, in the order that the payments were taken, giving you a payment transaction number, patient name, payment date, payment method, payment amount, discount allocated (if applicable), payment narrative (eg Payment thank You) and the user who recorded the payment.

There will also be a summary at the end of the report that breaks down how much has been taken:

(a) for each payment method and
(b) for each performer

Any items of stock will not be included in the amount taken for each performer, but will be itemised separately.

Printing the Report by Date and Time

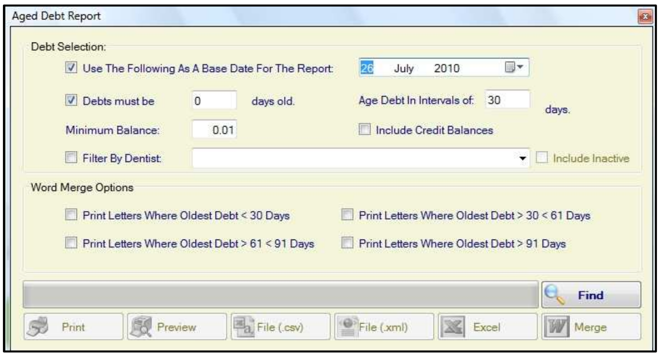
If you remove the tick from the **Cashing Up** box, you have the ability to specify a date and time range between which all transactions will be included. Removing the tick from the **Cashing Up** box will not affect subsequent cashing up in any way.

From **To**	Set the start and end dates and times.
Patient	If you click the **Find Patient** button and select a specific patient, then the report will only display the payments for that particular patient. Otherwise, payments for all patients will be included.
Provider	Defaults to **All** providers but you can display payments for a selected provider by selecting that provider from the drop down list.
Payment Methods	Defaults to **All** payment methods but you can display payments taken by a selected payment method only by selecting that method from the drop down list.
Report Format	The report can be printed in either **Detailed** or **Summary** format. A **Detailed Report** will list every payment in the selected range, with totals at the end. In addition, this report will have a final page that will summarise the amounts received for each payment method. A **Summary Report** will just display the final payment method summary only.

Click either the **Preview** or **Print** button, as required.

Aged Debt Report

This report prints a list of patients who owe you money and gives an aged analysis of each patient's debt. Select **Financial/Aged Debt** from the **Reports** menu.



Debt Selection

<table>
<tr><td>Base Date</td><td>By backdating the base date, you can exclude from the report all transactions added after the specified date.

The base date will default to today's date and, therefore, all debts will be included.</td></tr>
<tr><td>Debts must be …</td><td>If you type a value in this field, then the debts must be at least that many days old to be included in the report. Debts <u>younger</u> than the value entered (in days) will be ignored.</td></tr>
<tr><td>Exclude if over …</td><td>If you type a value in this field, then debts must be equal to or less than that number of days old to be included in the report. Debts <u>older</u> than the value entered (in days) will be ignored.</td></tr>
<tr><td colspan="2">To produce a current aged debt report that includes all debts, irrespective of their age, then leave the Base Date set to today's date and the ageing fields set at zero.</td></tr>
<tr><td colspan="2">Note: There is a separate option to allow you to print statements to all patients who owe you money – see page 47. Data can be exported from the Aged Debt Report, however, to Microsoft Word which would allow you to send letters, instead of - or as well as - statements, to all patients who owe you money. You can use a combination of the Debts must be and Exclude if over fields, to write individual aged debt letters to patients according to how long the debt has been outstanding, ie if you set the Debts must be field at 30 and the Exclude if over field at 60, it will only include those debts between 30 and 60 days old. This would allow you to send a different letter to those patients whose debt – or part of the debt - are over 60 days old.</td></tr>
<tr><td>Intervals</td><td>Debts can be broken down into pre-defined intervals.

By default the ageing analysis will be displayed in 30 day intervals, ie current (<30 days), 30-59 days (<60 days), 60-89 days (<90 days) and greater than 90 days (>90 days). You can edit this interval if required, for example you could age your debts in 7 days intervals, if preferred.</td></tr>
</table>

Minimum Balance	This will default to zero and all debts will be included in the report. You can enter a minimum balance and, if you do so, only those debts equal to or greater than that minimum balance will be included in the report.
Include Credit Balances	This box will default to not being ticked and will not include patients with a credit balance. If you wish to include credit balances, tick this box before running the report.
Filter by Dentist	By default the report will include debts for all dentists. If you wish to filter by dentist, click the **Filter by Dentist** box and select the dentist from the drop down list.
Include Inactive	If this box is ticked, inactive users will be included in the drop down list. Otherwise, only current users will be offered for selection.

Output Options

Once you have specified your selection criteria, click the **Find Patients** button. This will select the patients who meet your selection criteria and allow you to select one of the following output options.

Print

Prints the report to your default report printer.

Preview

Previews the report on the screen, from where you can select to print to your report printer.

File (.csv)

Writes the information to a comma separated value file which can be imported into an external application or used as a hit file for a mail merge. Records will be separated by hard returns and fields within each record separated by commas. You be prompted for a file name and save location.

File (.xml)

Writes the information to an xml file. This is a relatively new format that is not yet commonly used.

Excel

Opens the data in MS Excel spreadsheet. You will be prompted for a file name and save location following which the data will be displayed as an Excel spreadsheet.

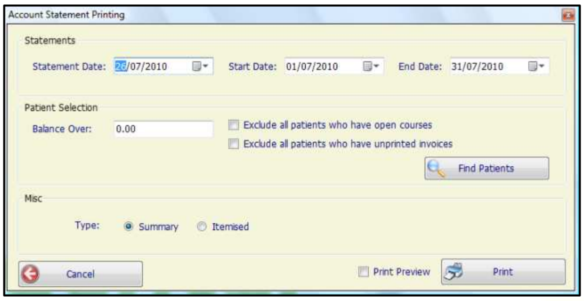
Word Merge

Allows you to merge directly from the dental system into MS Word for aged debt letters. A template would first need to be created before this option could be used. ###

STATEMENTS

Statements can be printed for each patient who owes you money. Each transaction raised between the start date and end date would be listed on the statement (invoices, credits, payments and refunds). Default statement layouts will be included with the system but these can be customised by yourselves.

1) Select **Financial/Account Statement Run** from the **Reports** menu.



STATEMENT OPTIONS	
Statement Date	This is the date that will be printed on the statement. It will default to today's date but can be overwritten if required.
Start Date	The start date specifies the date of the first transaction to be included in the statement print for those patients who owe money. A brought forward amount will be displayed showing the amount that was outstanding on the account on the start date. The start date will default to the first day of the current month.
End Date	The end date specifies the date of the last transaction to be included in the statement print. A carried forward amount will be displayed showing the amount that is/was owing at the end date. The end date will default to the last day of the current month.
PATIENT SELECTION OPTIONS	
Balance Over	You can exclude statements for patients with a balance below a specified amount by typing in that amount. If this is left at zero, it will include all patients who owe money, irrespective of the amount they owe.
Exclude all Patients who have Open Courses	Click this box if you wish to exclude statements for patients with open courses of treatment. If you wish to include all patients, even those with open courses of treatment, leave this box unticked.

Exclude all Patients who have Unprinted Invoices	Click this box if you wish to exclude statements for patients with invoices held for printing later. If you wish to include all patients, even those with held invoices present, leave this box unticked.

2) Click the **Find Patients** button. This will display the patients who meet the specified criteria.

3) To print statements for all of the patients displayed, click **Check All**. This will place a tick in the check box by the side of each patient's name. You can then deselect individual patients by clicking on the check box for those patients. If you have clicked **Check All** by mistake, you can deselect all patients by clicking **Uncheck All**.

   To print for selected patients only, click the check box beside each of the required patients' names.

MISCELLANEOUS OPTIONS	
Statement Message	Any message typed into this box can be displayed on the statement. You can include a token on the statement layouts that will determine where this statement message will print.
Type	There are two default statement layouts included with the system **– Summary** and **Itemised**. **Summary** Summary print includes a single line entry for each transaction, ie invoice/credit/payment/refund. **Itemised** An itemised print includes a breakdown of all treatment for each invoice/credit as well as a single line of entry for each payment/refund.

4) To preview the statement on the screen, click the **Print Preview** box and click the **Print** button.

   On the **Print Preview** display screen, you can:-

   - print the statement;
   - zoom into the display or
   - view 1, 2, 3, 4 or 6 pages at a time

   by clicking the relevant icon on the toolbar.

5) Click **Close** on the toolbar to close the preview and return to the previous screen.

6) To print the statement without previewing it, leave the **Print Preview** box unticked and click the **Print** button.

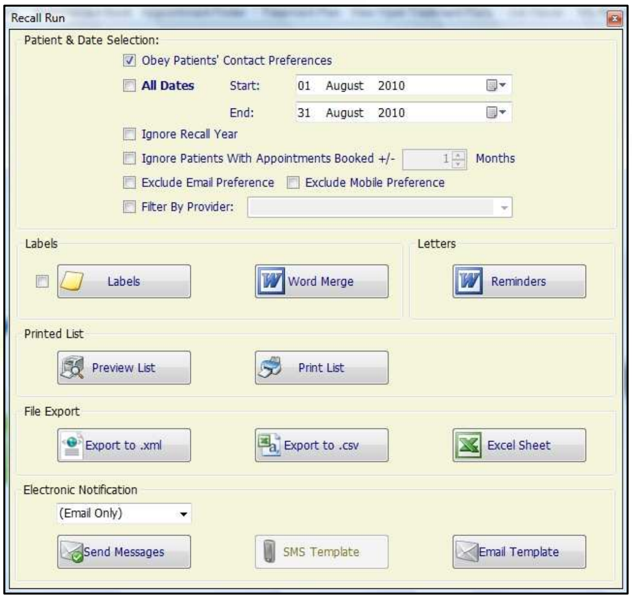
RECALLS

Each time that a new course of treatment is opened (or closed if the practice preference is set to update recalls on closing) the system will add the default period for that patient (as displayed on the **Patient Details** screen) to today's date to generate a new recall date.

The next recall date is displayed on the **Patient Details** screen and can be edited manually from there if required.

You can search for patients with a recall date within a specified period and for each patient selected, you can:-

- Print labels, letters and/or a report.
- Export the data to an **xml** or **csv** file.
- Export directly to a Microsoft Excel spreadsheet.
- Send a text message or email.



To access the recalls option, select **Recall Run** from the **Reports** menu.

PATIENT AND DATE SELECTION	
Obey Patient's Contact Preference	Checks for preferences on the patient details screen.
All Dates	If there is a tick in the **All Dates** field, reminders will be sent to all patients, regardless of when the reminders are due. Remove the tick and select a **Start** and **End** date if you wish to send reminders in a specified date range.

Ignore Recall Year	If this box is ticked, then the recalls will be selected based upon the day and month only. That way, if a recall is missed one year, the patient will be automatically reminded the following year also.
Ignore Patients with Appointments Booked	Tick this box to exclude patients who are due a reminder if they already have an appointment within a specified number of months, either before or after their due date. Specify the required number of months.
Exclude Email Preference	Tick this box to exclude patients who do not have the **Email Preference** box ticked.
Exclude Mobile Preference	Tick this box to exclude patients who do not have the **Mobile Preference** box ticked.
Filter by Provider	If you wish to filter the recalls by provider, click this box and select the provider from the drop down list.

These last two options would allow you to print labels or letters to patients who would not receive an Email or SMS text message. If you are not using Email or SMS, then leave these two boxed unticked.

Once you have specified the patient and date requirements, select the required output of your report.

Printed Output

LABELS	
Labels	This will print labels to a label printer. If you do not have a label printer, then you can still print labels using the **Labels (Word Merge)** option.
Labels (Word Merge)	This will print onto a page of A4 labels on your default reports printer. There is a direct link into MS Word. You need to create a label template in MS Word before you can start using this option. If you do not have a copy of MS Word, you could export the data to a csv file and use this to print labels using any other word processing package that supports mail merge. Field tokens to be included in the merge are

	as follows:- Title, Forename, Surname, Address1, Address2, Address3, Address4, Postcode.
Reminders (Mail Merge)	You can print a reminder letter using a direct mail merge into MS Word, as with the A4 label option. As with the labels, you will need to create a letter template in MS Word before you can start using this option. Field tokens to be included in the merge are as follows:- Title, Forename, Surname, Address1, Address2, Address3, Address4, Postcode, RecallDate
Preview Button	Tick this box before clicking either of the above options to preview the results before printing.
PRINTED LIST	
Preview List	Select this option to preview a report of all patients whose recalls are due in the specified date range. Once the preview has been displayed, the report can be printed by clicking the print icon at the top of the preview screen.
Print List	Select this option to print a report without previewing it first.

File Output

FILE EXPORT	
Export to .xml	Exports the data in xml format. (xml is a generic framework for storing any amount of text or any data. Its primary purpose is to facilitate the sharing of structured data across different information systems, particularly via the internet.)
Export to .csv	Exports the data in csv format. If you do not have a copy of MS Word, this file could be used, for example, as a hit file to create a mail merge (either to letters or labels) in another word processing package that

	supports mail merge.
Excel Sheet	Exports the results and displays them in MS Excel.

Electronic Output

If you have printed recalls and excluded either the **Email** or **Mobile** preference in the **Patient and Date Selection** section, you can subsequently choose to send Emails or SMS text messages to those patients excluded from any printed output. You could, of course, choose to send Emails and SMS text messages as well if you prefer.

Templates would need to be set up for both text messages and Email and your system configured to send text messages and Emails before these options are first used. For text messages, you would need to sign up to a text message provider and for Emails you would need to be connected to broadband. Please contact our Support Department for further details.

Once your system has been configured, select one of the following options from the drop down menu.

Email Only	Will send an Email to those patients where the **Email preference** box is ticked.
SMS Only	Will send a text message to those patients where the **Contact by SMS preference** box is ticked.
Email then SMS	This will send either an Email or SMS or neither, depending on the following order of precedence. It will check each patient's record and send:- • an Email to those patients where the **Email preference** box is ticked; • where the **Email** preference box is not ticked, it will send a text message if the **Contact by SMS** box is ticked; and • if neither is ticked it will send neither.
SMS then Email	This option is the same as the one above, except that the order of precedence is SMS first and Email second
Both Email and SMS	This will send both Email and SMS where the preference boxes are ticked.
Send Messages	Once one of the above options has been selected, press the **Send Messages** button.

SMS Credits	There is an option in the **Edit** menu that allows you to record that you have purchased SMS text credits from your text provider. If you record all purchases using this option, this display will give you an indication of how many text credits you have available. The actual amount of credit you have available will be handled by your text message provider. Once the text messages have been sent, the **SMS Credits** field will be updated.
SMS Template	Click this button to set up your SMS text message template – ie the default text message that will be sent to each patient. See notes below.
Email Template	Click this button to set up your Email template – ie the default message that will be Emailed to each patient. See notes below.

SMS Template

The SMS template file is called SMS.xml. There will already be a default template in existence, as follows. This should be displayed ready for selection.

From: **This should be your Email address for your text provider account.**

Subject: Will default to **Recall** but can be edited.

Body: This box should contain the text message that you wish to send to your patients. The default message can be edited and the text can contain the field tokens listed below.

Make the necessary changes and click the **Save** button.

Email Template

The Email template is called Email.xml. There will already be a default template in existence, as follows. This should be displayed ready for selection

This is set up in a similar way to the SMS template. Make your changes and click the **Save** button.

Tokens for Electronic Output

The following tokens can be embedded in the text of either SMS or Email templates. When the SMS messages and Emails are sent, the following data will be inserted in place of these tokens.

“PATIENT NAME”	Patient’s title followed by patient’s surname
“DUE”	Recall date – as displayed on the **Patient Detail** screen
“DATE”	Today’s date

NHS

PROVIDER DETAILS

Before printing any forms or processing any claims for the first time, make sure that the **Provider Details** option on the **Administration** menu has been completed for each dentist for whom you wish to print forms.

1) The dentist must be added as a user before provider details can be completed. Select the dentist's username from the drop down box of **Registered Users**.
2) Tick the **Use Practice Address** box.
3) Type in the **Performer Number**, **Contract Tag** and **Location ID** in the boxes provided. If the dentist is an associate dentist, just enter the dentist's performer number in the **Provider Number** box and leave the other sections of the contract number blank.
4) The **EDI PIN** will be added later for those practices intending to use the WebEDI transmission module.
5) Click **OK**.

FP17 FORM PRINTING

If you do not plan to transmit claims via WebEDI, you can:-

a) print the form header only (provider/performer and patient details) and manually add the claim details after the form has been printed; or

b) print the entire form by manually adding the claim details on the screen before the form is printed; or

c) if you are using the system to enter clinical records, print the fully completed form. The form details can be viewed and edited before printing if required.

Printing the FP17 Form Header

1) Select **Form Printing and UDAs/FP17 Form Header (NHS)** from the **Reports** menu.
2) **Provider Details**
   - If the dentist who carried out the treatment is also a provider, then leave the tick in the **Performer Number Same as Provider** box.
   - If the dentist who carried out the treatment is not a provider, then click on the **Performer Number Same as Provider** box to <u>remove</u> the tick and select the relevant performer from the drop down list.

   Note: If the practice is the provider, then the **Provider** box on the **Practice Details** screen should be ticked and the relevant contract details added – see page ###.

   The provider's name, address and contract number will be displayed on the screen.
3) **Patient Selection**
   - Click the **Search for Patient Record** link.
   - Search for and select the patient for whom the claim is to be submitted.

- The patient's details will be displayed on the screen.

4) Click the **Print** button.

Manually Completing and Printing the FP17 Form

1) Select **Form Printing and UDAs**/**Manually Produce FP17 Form (NHS)** from the **Reports** menu.
2) Complete items 2) and 3) above (for printing the form header).
3) Click the **Next** button to display and fill in the claim details section of the form.
4) **Claim Details**

   The following edit options are available for completing the claim details.

   - Click on a box to add a cross in the box – click again to remove the cross.
   - On a date field, click on an individual date section and type in the date or click the **Browse** button to display a calendar for selection.
   - On any other sort of data entry box, click on the box and type in the data.

5) Click the **Print** button to print the form.

Note: It is not necessary for each letter to line up exactly with each box provided on the form, as long as the first letter is lined up properly in the first box on each line.

Printing a Completed FP17 Form

1) Select **Form Printing and UDAs**/ **FP17 Pending Claims (NHS)** from the **Reports** menu.
2) All pending claims will be displayed on the **Unprocessed** tab. Select the form to be printed by double clicking the relevant record or single clicking and clicking the **Process Selected** button.
3) Complete the provider/performer section as outlined in item 2) on page 55 for printing the form header.
4) The patient details will be already displayed – click the **Next** button to display the claim details section of the form.
5) Check the details to confirm that they are correct and edit any that you wish to change by clicking on that section of the form and overwriting the default entries. All default entries will be coloured in yellow (if you change any of the pre-selected boxes, the original box will remain in yellow).
6) Click the **Print** box to print the form.
7) The claim details will be removed from the **Unprocessed** tab and can be viewed on either the **Processed by Date** or **Processed by Patient** tabs.

NHS - WEBEDI TRANSMISSIONS

REGISTRATION AND CONFIGURATION

WebEDI allows you to send secure NHS claims between your dental system and the NHS Business Services Authority Dental Services Division (DSD) via the internet. Before you can begin transmitting Web-EDI claims, you need to apply for a site number (application form – CGDP 8). The DSD will then send your site number.

When you have your site number, each dentist who wishes to transmit should register at http://ebusiness.dpb.nhs.uk and keep a secure note of the passwords and usernames issued. The DSD will process your application and send a confirmatory email that you are able to begin transmitting claims via WebEDI. Each dentist will be issued with a PIN (Personal Identification Number) which will be sent by post in a security envelope to your practice address.

Useful contacts:	**DSD External Access Support Team** **Email: edisupport@dpb.nhs.uk**	**01323 433560**
	DSD Helpdesk **Email: helpdesk@dpp.nhs.uk**	**01323 433550**
	NHSBSA Dental Services Division **Compton Place Road** **Eastbourne** **East Sussex** **BN20 8AD**	

Once your account has been activated, you should then contact our Support Department so that your software can be configured ready to begin transmitting claims. They will need your Site Reference Number and a Username and Password for each dentist. The PIN for each dentist will need to be entered onto the system – this can either be done by the Support Department at the same time as setting up but the PIN can be entered by yourselves. This is stored on the **Provider Details** screen and will be encrypted, for security purposes, as it is entered.

PR forms can be obtained from your local Primary Care Trust – you are required to complete this form for each patient.

NHS FEE SCALE

An NHS fee scale should already exist on your system. A new scale should be created each time that the banding prices are adjusted. You should identify the active (current) NHS fee scale from the **Administration** menu - **System Maintenance**/**Application Preferences**/**NHS** tab.

EXEMPTION/REMISSION

Exemptions added to the patient details screen will default onto the course information screen when opening a new NHS course. These can be overwritten where necessary.

PROCESSING CLAIMS

To transmit WebEDI claims you can process by one of the following two methods:

a) Manual – by completing a claim form on screen manually (see notes on page 56 – Manually Completing and Printing the FP17 Form) and choose to **Queue** the claim for transmission instead of printing the form; or

b) Auto – by entering the treatment details using the system (with or without the charting module), whereby the system will complete the claim details for you. The completed claim form will be displayed on the screen for you to accept - or edit if you wish to do so. You can then choose to **Queue** the claim for transmission instead of printing the form (see notes on page 56 – Printing a Completed FP17 Form).

Unprocessed Tab

This tab displays all of the completed NHS claims which will remain on this tab until they have either been transmitted or printed. These claims can be filtered by dentist by selecting the relevant dentist from the drop down list and should be checked and marked as ready for transmission – ie queued for transmission. You will be prompted for your PIN each time that you queue a claim.

NOTE: If you prefer, you can view and queue a claim as the course is completed. You will be prompted for your PIN as you complete the course and queue the claim. There is an option to remember the PIN – you can click this if you do not want to have to enter the PIN each time that a subsequent claim is queued for transmission.

Each time that you enter your PIN, the system will validate your entry. If the PIN is not correct, you will be prompted to re-enter.

Queued for Transmission Tab

This tab displays all of the claims that are ready for transmission, either from the completion of the course or from the **Unprocessed** tab. The claims need to be built into a file before they can be transmitted to the DSD. There is a tick box beside each claim – tick the claims to be included and click **Transmit Selected**.

The file will then be built and the claims transmitted. How often you transmit these claims is up to you – WebEDI is normally accessible 24 hours a day. Once a claim has been transmitted, the claim details will be moved onto the **Awaiting Acknowledgment/Rejected Claims** tab**.**

> **NOTE**: The DSD recommends that you can arrange the timing of transmissions to suit your working practice but that you should not send batches of more than 500 claims at a time.

Awaiting Acknowledgment/Reject Claims Tab

Details of the transmission will remain on the transmissions **Awaiting Acknowledgment** section of this tab until an acknowledgment is received to confirm that the file has been successfully received (but at this point, not processed) at the DSD. Once acknowledged, the file will be removed from display and can be viewed from either of the two remaining tabs – **Processed by Date** and **Processed by Patient**. (Any file that remains displayed in this section for an unusual length of time, therefore, should be assumed to have not been received by the DSD.   This should be queried with them and, if applicable, retransmitted - right click to retransmit the file.)

Detailed validation of individual claims contained in the file will then be carried out by the DSD and this will generate an electronic response for any rejected claims. Valid claims will automatically be passed to the DSD payment process.

Once acknowledged, any rejected claims will be transferred to the **Rejected Claims** section on the bottom half of the screen. Individual courses can be edited to generate a correct claim, or the claim form itself can be edited, before re-transmission.

UDA Data

Data transmitted by the DSD regarding UDAs can be viewed from the **UDA Information** tab on the **NHS Treatment Course Processing** screen. You can use the filter controls to display graphs showing the **Average Targeted** and **Achieved UDAs** in a date range.

You can also use the **Forecast** button to compare the achieved UDAs to the required UDAs.

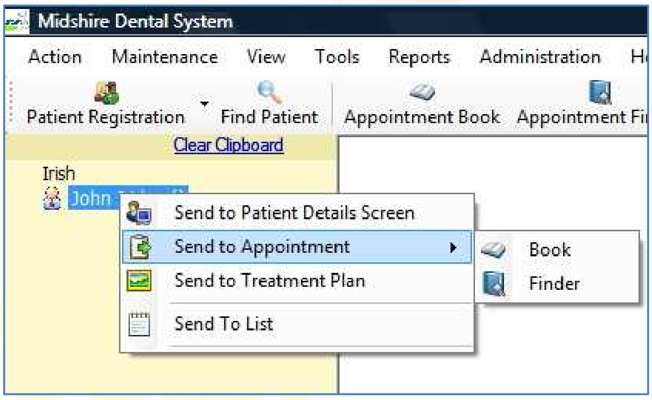
USING THE CLIPBOARD

You can open more than one patient record at a time. Each time that you open a patient record while another record is still open, the new record will be displayed in place of the original one, but the original one will remain open in the background.

Each time that you access a patient record, that patient's name is added to the clipboard. You can display the clipboard by clicking the **Clipboard** icon on the toolbar at any time and all recently accessed records will be displayed, even records that have since been closed. Click the **Clipboard** icon again to close it.

The length of time that a patient's details remain on the clipboard can be customised per user by selecting the **Manage Groups**/**Users**/**User Preferences** option from the **Administration** menu.

On the clipboard, records that are open are coloured green and records that have been recently closed are coloured black.



You can left click on an entry in the clipboard to select that entry and then right click it to display the **Clipboard** menu options and navigate, as follows: