TRAINING WORKSHOPS XDENT



MAY 2022

DentalWize XDENT Training Manual for Dentists and Oral Hygienist

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NOTE:

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



Scan for full training manuals

1. Searching for Patients

TRAINING GUIDE REFERENCE: Page 38 – 42 / Full Guide_XDENT_English_Clinical

Search filters

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

In order to access the *categories filter*, click on the arrow under the Lookup Field in the patient list window. If you click on the filter, you can select one or more categories in order to view all the patients included. The categories filter takes into account all the categories specified in the patient's records.

	List	of Patients	
Q - Search patient by N	lame	80)6	+ - 🖻
-		(by Name)	
Categories: 1/2 🗢	🗹 Active 🔽	Not Active	Only non-complete records

In the table layout (that can be activated from *Settings, Patients record*), where the column displayed in the list can be customised, the window can be set both horizontally and vertically.

Search in the Patients List.

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



2. Creating Treatment Plans

TRAINING GUIDE REFERENCE: Page 6 / XDENT Quick User Guide v0.9_20160317

	Clinic Data of Daniel Schmidt	
Daniel Schmidt	XDENT'>>> Dental Chart	AdJ Treatment
A years		
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TRAINING GUIDE REFERENCE: Page 14 / XDENT Quick User Guide v0.9_20160317

🔤 Treatments - Default Treatment List				-		×
[4 4 ▶ ▶] 1 of 93				+	- (2
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	Diagnostic	1	consultation			
Type: Diagnostic V Code: Order no.: 1	Diagnostip	1	prown pementation			
	Diagnostic	1	extraction with inhalation seclation			
Symbol	Diagnostic	i	extraction with auture			
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÷	Diagnostip	1	Fissure cealant			
Account record Description in Xinfo	Diagnostic	1	Fissure sealant I			
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	Diagnostic	1	Beneral anaesthesia cuote			
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	Diagnostic	1	Beneral anaesthesia guote II			
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	Diagnostic	1	introduction polishing			
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	Diagnostic	1	Boot canal anterior final visit			¥
🖶 Print 🖶 Symboliz 🕤 Export 🛛 👔						

How to Create a Treatment Plan?

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

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2	Help Report	:= Vervine	trant plans	Cancel	of an

TRAINING GUIDE REFERENCE: Page 105 - 111 / XDENT_User_Guide_v1_2

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List of Treatments:					
Description 🔺	Тура	8.200	Silver	Gold	
acrylic base partial denture	General Dentistry	240.00	220.00	200.00	٩
addition to existing denture per tooth	General Dentistry	108.00	99.00	90.00	
Amalgam (Complex)	Restorative Dentistry	120.00	110.00	100.00	
Amalgam (Dentine Pin)	Restorative Dentistry	35.00	33.00	30.00	
Amalgam (Simple)	Restorative Dentistry	78.00	71.50	65.00	
Amoxicilin	Medication	0.00	0.00	0.00	
Anterior Composite (Complex)	Restorative Dentistry	193.00	165.00	150.00	
Anterior Composite (Simple)	Restorative Dentistry	95.00	88.00	80.00	
anterior root canal therapy	Endodontic:	600.00	550.00	500.00	
attending dentist statement	General Denfistry	50.00	55.00	50.00	
biopsy and report	Oral Surgery	240.00	220.00	200.00	
bone mapping	Oral Surgery	300.00	275.00	250.00	
cast base partial denture	General Dentistry	600.00	550.00	500.00	
cast full per jaw	General Denticity	1440.00	1320.00	1200.00	
Cephalogram	Diagnostic	120.00	110.00	100.00	
Ceranic Crown	Restorative Dentistry	1320.00	1210.00	1100.00	
ceranic veneer	Restorative Dentistry	1200.00	1100.00	1000.00	
complete denture acrylic both jaw	General Dentistry	1920.00	1760.00	1600.00	
complete denture acrylic each jaw PHASES	General Dentistry	950.00	880.00	00.008	¥
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TRAINING GUIDE REFERENCE: Page 26 / Full Guide_XDENT_English_Clinical

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Default								General Dentiatry	100	rebasing
eatment								General Dentistry	9	addition to existing denture per tooth
notes:								Ceneral Dentistry	10	repair denture or clasp
Prices								General Dentistry	11	temporary prosthesis
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Cal C 100	68			Price	Gross Profit	Net	Profit	General Dentistry	13	night guard
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			10.000 (C) (C)					Utal Surgery	2	single work exercicity rangerers
								Oral Surgery	3	complicated tooth extraction
								Oral Surgery	4	single tooth extraction (primary anterior)
								Oral Surgery	5	single tooth extraction (primary posterior)
								Oral Surgery	6	surgical removal of impacted tooth

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Treatment diary

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

Contents in the Treatment diary are shown in a user-friendly manner, which is readable also in its structured visualisation, which is as a sequence of treatment-related registrations.

The diary is **structured** as a sequence of information referring to the single treatments or to the patient in general.

3. Billing and Invoicing

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

How do you issue an invoice?

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

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Daniel Schmidt					Ac	counting sl	tatement:		0.00	Total full	l payments	
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TRAINING GUIDE REFERENCE: Page 8 / XDENT Quick User Guide v0.9_20160317

How do you register a payment of an invoice?

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

CDENT	Archive	Edit	Multimedia	Operations	Documents	Accounting	Store	Services	Windows	Help		
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TRAINING GUIDE REFERENCE: Page 141 – 144 / XDENT_User_Guide_v1_2

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4. Claims Submissions

TRAINING GUIDE REFERENCE: CGM XDENT Claim Submissions.pdf

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tal Debit: 8,877.82	Total Credit:	1,462.68		Tota	ii: 8,3	20.70				
	/ # + -	1								Available in X
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Patient: Recording L	emonstration Main Memb	per of ZAR 257.79								
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8101 Oral examination		COSMETIC & DENT/	10/05/202	158.91	158.91	0.00	0.00	0.00	Z00.0	Consulting Ro
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5. X-Rays

TRAINING GUIDE REFERENCE: Page 35 – 41 / XDENT_User_Guide_v1_2

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TRAINING GUIDE REFERENCE: Page 115 – 120 / XDENT_User_Guide_v1_2

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6. Medical Certificates

TRAINING GUIDE REFERENCE: Page 81 – 84 / XDENT_User_Guide_v1_2

How to Issue Medical Certificate for a Patient in XDENT?

Patient Record > Medical Certificate

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

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

×	Medical Certificate		- 🗆 🗙
Issuer:	CGM Singapore		
Document #:	6	Date of visit: 17/08/2016	
Patient: Sam Sung (N	RIC #:S8600000Z)	Date of birth: 01/01/1980	
Start date:	\$ 10/08/2016	Day(s) taken:	÷ 3
End date:	12/08/2016		
Reason:			~
Practitioner:	DR. KEWAL PRADHAN		
	Dr. Kewal Pradhan		
			Confirm

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

To View, go to Documents > Medical Certificate

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

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

issues certificates by				2016 9		
Date	Number v	Patient	Practitioner	Void		
17/08/2016	7	Sam Sung (NRIC #:S86000002)	DR. KEWAL PRADHAN			
17/08/2016	6	Sam Sung [NRIC #:SB6000002]	DR. KEWAL PRADHAN	17/08/2016		
26/07/2016	5	Edith Lin (NRIC #:S7952214E)	DR. KEWAL PRADHAN			
21/07/2016	4	Nichael Mint (NFIE # \$7989894E)	DR. KEWAL PRADHAN			
20/07/2016	3	Kewal (NRIC #:S86000002)	DR. KEWAL PRADHAN			
20/07/2016	2	Kewal	DR. KEWAL PRADHAN	20/07/2016		
20/07/2016	1	Kewal	DR. KEWAL PRADHAN	26/07/2016		

7. Quotes

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

		ο.									
Quotations of	Razak									-	□ X
	1 of 1										- # Q
\gg				Archive		No. 2	Date 15/03/16	Stat.	TP Stat.	TP payer	Title Quote 1
Title: 2000 User: Admini Patient: Pende	stelar g 🕜 V	No.: 2	Dete: Amount: 98	15/03/16 0.00	Ħ						
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Ref. Doctor	188666888 188989999	8888 8888		88 77							
UPPT Traat 23 R 23 S 8 R LOW Treat 45 R	ER DERTAL ARCH Basel Ling and gelister of carel a statutor first v being and gelister of carel a statutor first v Quotation bola amount Eingel 986.00		Amount Ringgit300. Ringgit300. Amount Ringgit300.	20 20							
15/3 PAYI Depo No. ir	/2016 HENT MODE SRI 400.00 Skilalmentari 1 When treatment plan is comp Isbar completed Presiment	oleted: 580.00									

Q

TRAINING GUIDE REFERENCE: Page 61 – 65 / XDENT_User_Guide_v1_2

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

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

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

-			Clinic Data of Sar	n sung						
1	Sam Sung							Ť	dd reatment	+
•	36 years									
I	Conservative Conse			8	80	88	9	78		8
	Kacal	Deciduos test Phys. Examination	ñ					8	Decelect	nents
	Trest plan Edit Testner/Plan		Treassent Consultation (Complex) surgical endodontos	Timing 45 60	Amount St 120.00 9 1,440.00 9	anas Data P 12/08/20 D 12/08/20 D	Vacitioner R. 1211/AL PRACH R. 1211/AL PRACH	App. Date	Diagn. pr. DR. KEWAL P DR. KEWAL P	RADI- RADI-
	Tradeword status Facture In Progress									
2	Ductation w Helo Report	E Verinea	neet plans					Cancel		free

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

Documents > Quotation Form

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



TRAINING GUIDE REFERENCE: Page 59 – 63 / Full Guide_XDENT_English_Clinical

		Quotation Calcu	lation			
uotation	Calculation			Apply Discou	nts Reductiona:	testal price
Tooth	Treatment	T.P. payer o	uota Patient quot	a Reduct.	Reduced patient quots	Total area
	Periapical/ Bitewing	0.0	35.00	0.00	36.00	36.00
33,44-45	pulpotomy	8.00	720.00	0.00	720.00	720.00
	Occlusal View	0.0	72.00	0.00	72.00	72.00
	molar root canal therapy	0.0	1,200.00	0.00	1,290.00	1,200.00
	surgical endedentics	8.00	1,440.00	0.00	1,440.00	1,440.00
	Consultation (Complex)	0.00	120.00	0.00	120.00	120.00
	Consultation (Complex)	8.00	120.00	0.00	120.00	120.00
e ia		tal quotation: 0.00	0.00	0.00	3,706.00	3,716.00
Enter payn	ewit type: Deposit: 0.00 Instalmen	ts ns : 1 🚺 Due date: 🕫	rngleted treatment	Due dates	When treatment plan	is completed:3,7
		in Factor				
Edit Cotal a	propertionally value-related amounts	Propar Fixed a	tional reduction eduction	Teta	a 3708.00	Update
Reduction	rate to be applied on each treatment amount		Reduction % 0.00	Apply		Margins.
Quatation	Templetz w Standard Quotation					

9. Reports

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

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

The reports are divided into:

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

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

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

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

Suggest Day End reports

Patients Invoiced Report (Summary)

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

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

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

Accounting	Bill books	Practitioners	Treatmen	ts 🔶	Quotations		
From	n: 01/07/20		All dates until	to : 31/07/2			
ales Volume Revenue	Revenues Detail Pay	ment Income/	Expenditure Clair	n status 🛛 Age	Analysis Ov	erdues	
Total sales volume in the	timespan	Invoicing if	tems detail				
All issuers	O By issuer					Q	
All patients	O By patient					Q	
All ref. practitioners	O By ref. practitioner					Q	
All Reference person(s) O By Reference person	n				Q,	
With payments							
All payments types	O By payment type					Q	
All types	O By type					Q	
All practitioners	O By practitioner					Q	

Suggested Month End reports

Age analysis (Summary)

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

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

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

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

counting	Bill books	Prad	litioners		Quotations
	From: 05/08/2	20 📖 📮	All dates	until to: 05/	/08/20
s Volume Rev	enue Revenues	Detail Payment	Income/Expenditu	re Claim status	Age Analysis Overdues
View by	Patients	Filter by p	patient:		٩
		O Filter by a	ategory:		~
	O Third Party P	ayers Filter by "	TP Payer:		<u>Q</u>
Show details					
Aging buckets	III 🖲	🔾 30+ days	○ 60+ days	○ 90+ days	🔿 120+ days
a. I. J.		-			

TRAINING GUIDE REFERENCE: Page 155 – 156 / XDENT_User_Guide_v1_2

16. REPORT

Pending

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

The reports are divided into:

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

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

- 16.1 Accounting Reports
- 16.2 Purchase Reports
- 16.3 Medical History Reports
- 16.4 Appointment Reports
- 16.5 Patient Reports
- 16.6 Stock Reports