



Dental Information System

QUICK GUIDE

Synchronizing Healthcare



CompuGroup
Medical

INTRODUCTION

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

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

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

FREQUENT QUESTIONS

How do I access XDENT?

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

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

How do I access the functions of XDENT?

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



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

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

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

Practitioners Management

1 of 1

Send SMS Send email

Practitioners

ID: PRACTITIONER #1 Associated patients: Active

Reference pract. [Search] [X]

Surname: Smith Name: John to display in invoice

Position: [Dropdown]

Birthplace: [Text] Date of birth: [Text] Gender: [Text]

VAT No.: 12345678901

City: MADRID Post Code: 12345 Distr.: XX

Address: PLAZA DE ESPANA Phone: 123456

Mobile: [Text] Off. Phone: [Text]

Email: [Text] Order reg.: [Text]

Notes: [Text]

Cost per hour: 0.00 Daily output: 0.00

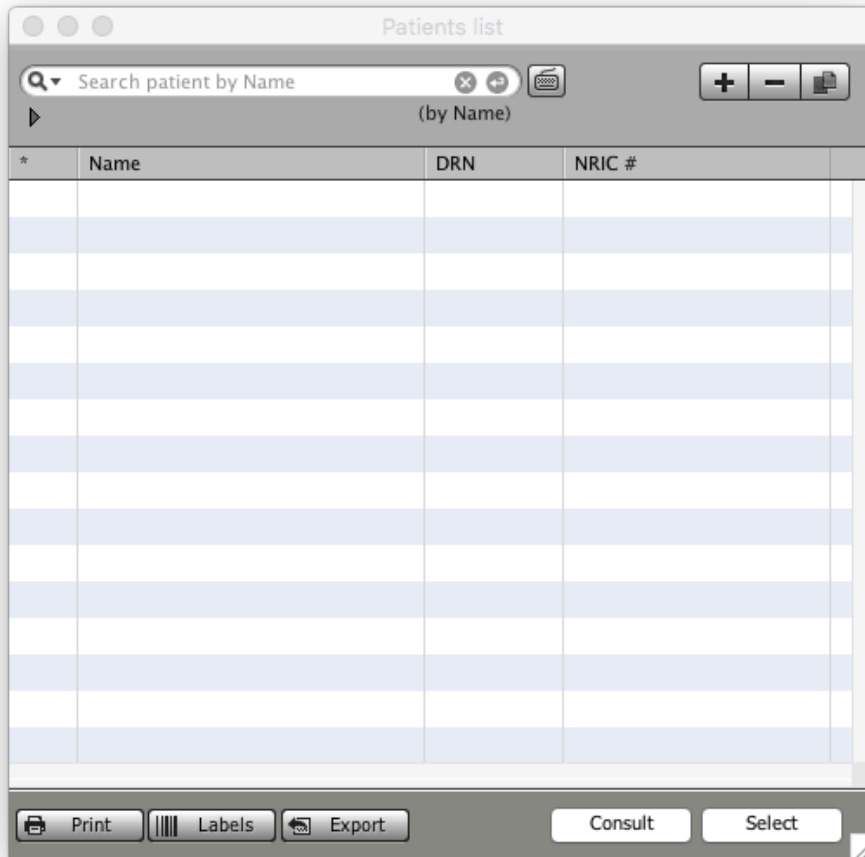
Default practice: None Practitioner-related quotas on performed treatments: %

Supervisor [Search] [X]

Print Help

How do you create a patient?

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

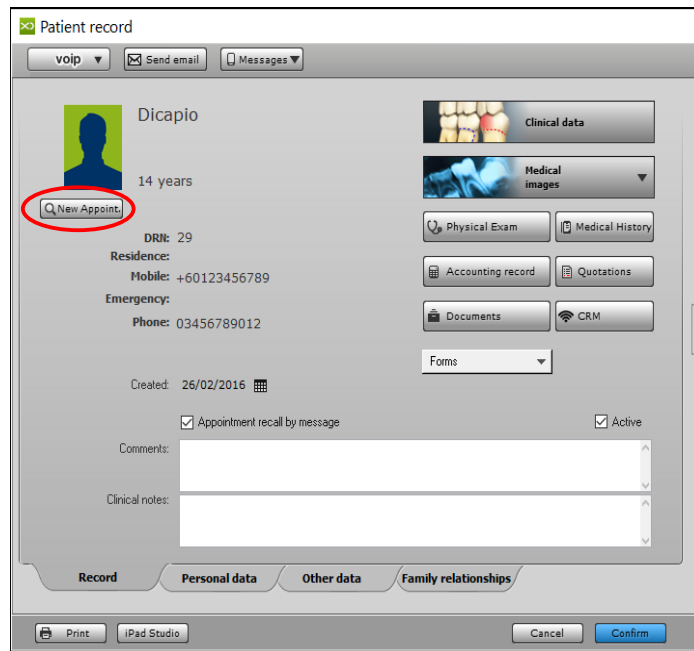


See details in section PATIENTS.

How do you fix a new appointment for a patient?

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

See details in section PLANNING WEEKLY / DAILY.



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

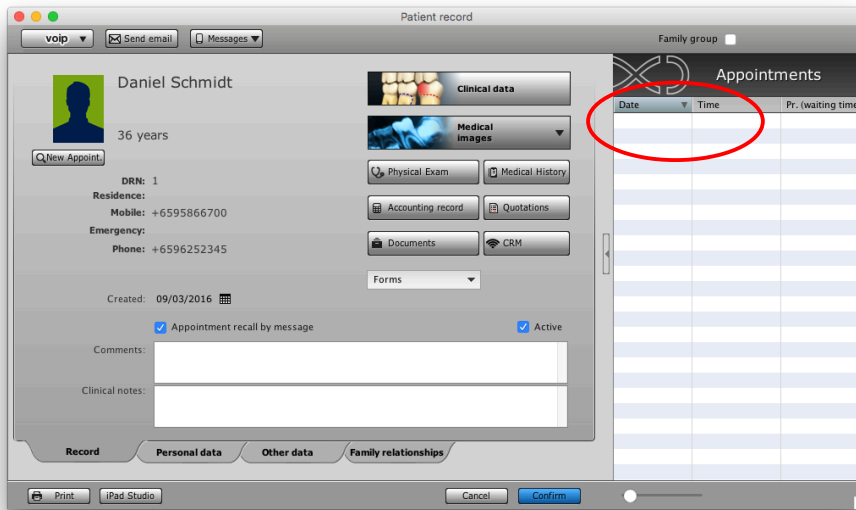
How to move an appointment?

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

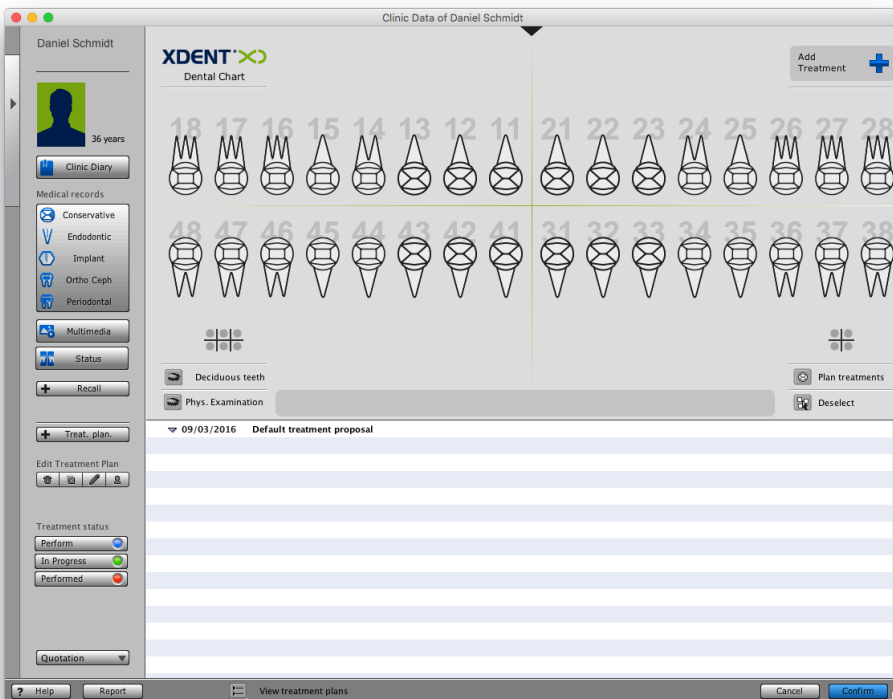
See details in section PLANNING WEEKLY / DAILY

How do you create a treatment plan?

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



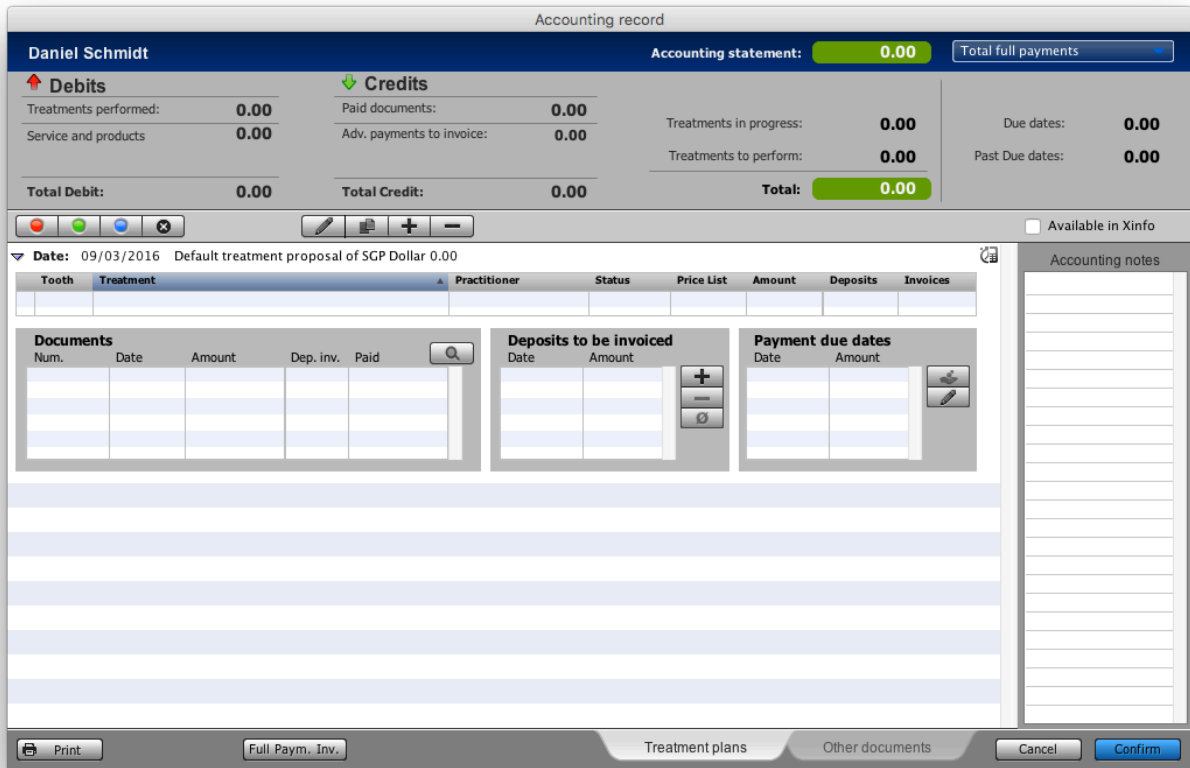
From the "Add service" button to select the services concerned and click "Confirmation".



See details in section PATIENT DATA.

How do you issue an invoice?

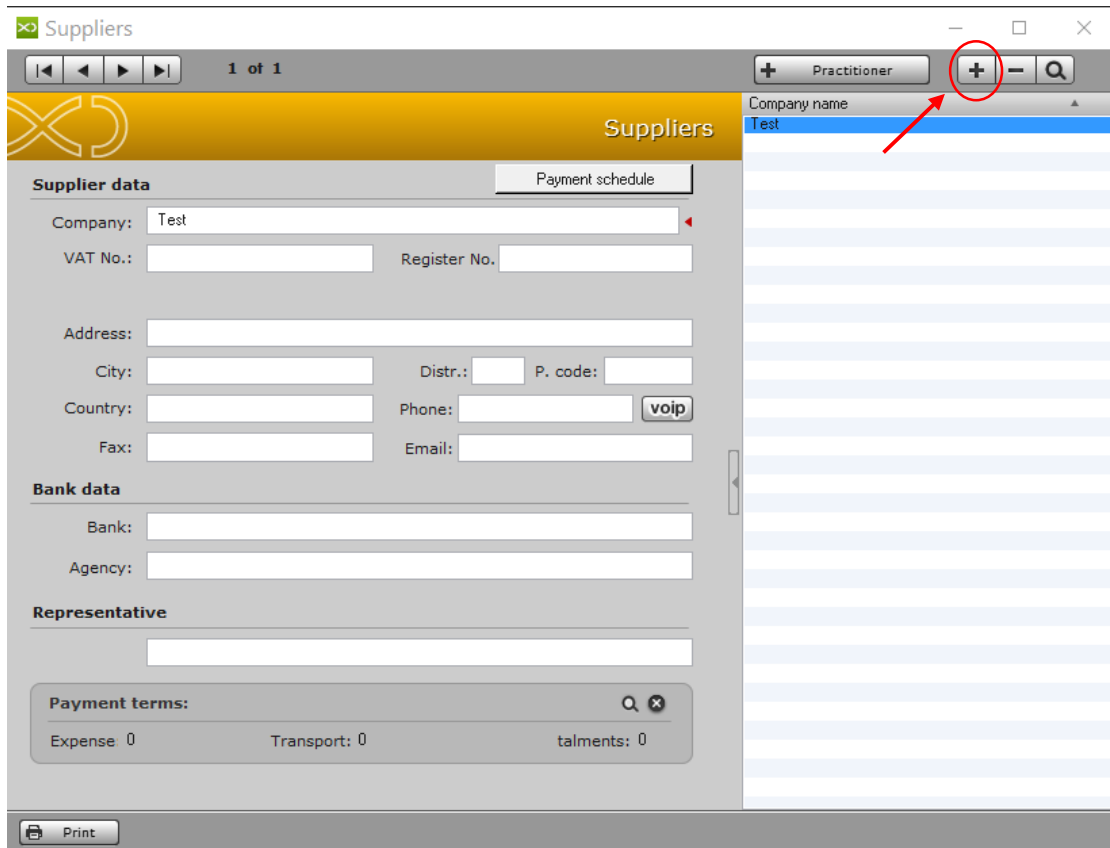
Open the patient's record, and press the "Accounting Record" button. Then choose whether to issue a Deposit invoice or to invoice performed treatments. To invoice performed treatments, you need to select the treatments to invoice from the treatment plan in the Accounting Record and click "Full Paym.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



See details in section PATIENT DATA.

How to register a supplier?

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

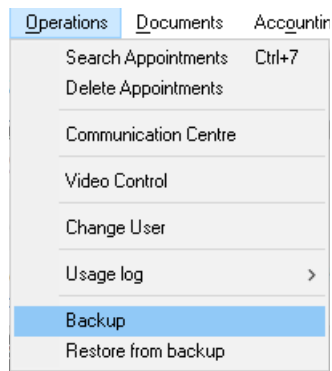


As you make a copy of the personal data?

From the menu OPERATION, enter the item BACKUP.

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

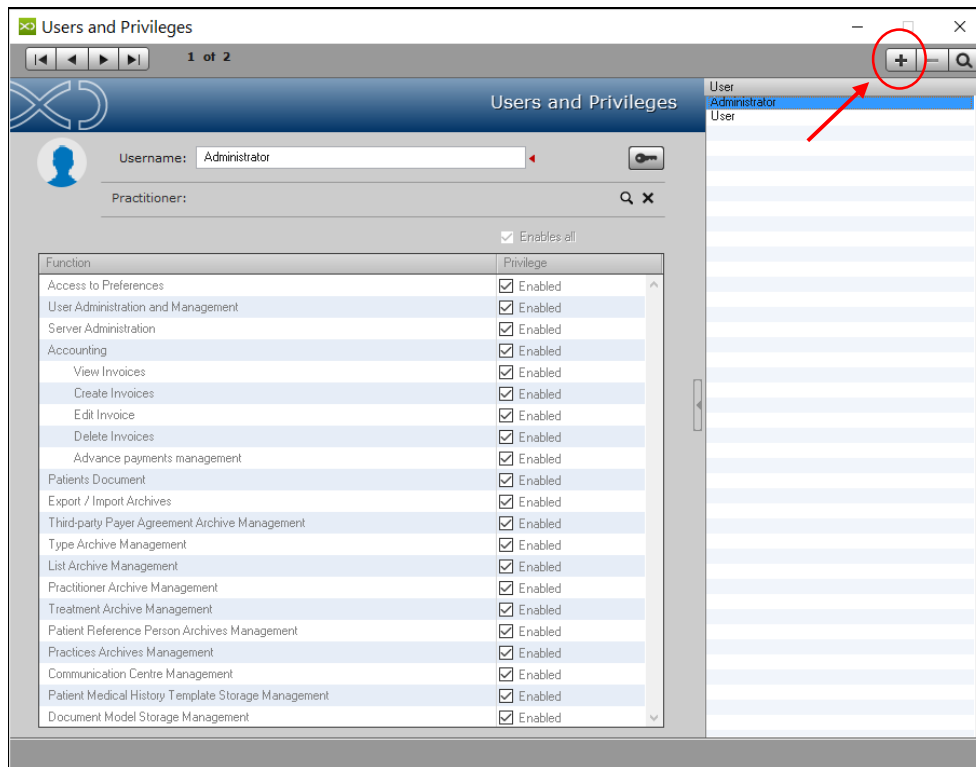
Backups can be restored at a later time, from the menu OPERATIONS / RESTORE FROM BACKUP.



USERS AND ACCESS RIGHTS

Access the menu ARCHIVE under USERS AND ACCESS RIGHTS.

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



PRACTITIONERS AND PRACTICES

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

The screenshot displays the 'Practitioners Management' software interface. The window title is 'Practitioners Management'. At the top, there are navigation buttons (back, forward, search) and a '1 of 1' indicator. On the right side, there are buttons for 'Send SMS' and 'Send email'. The main content area is titled 'Practitioners' and features a search bar with 'PRACTITIONER #1' entered. Below the search bar, there are several input fields and sections:

- Reference pract.:** A search bar with a magnifying glass icon and a close button.
- Personal Information:** Surname: Smith, Name: John, Position: (empty), Birthplace: (empty), Date of birth: (empty), Gender: (empty), VAT No.: 12345678901.
- Address and Contact:** City: MADRID, Post Code: 12345, Distr.: XX, Address: PLAZA DE ESPANA, Phone: 123456, Mobile: (empty), Email: (empty), Order reg.: (empty). There are 'voip' buttons next to the Phone, Mobile, and Off. Phone fields.
- Cost and Output:** Cost per hour: 0.00, Daily output: 0.00.
- Default practice:** A dropdown menu set to 'None'.
- Practitioner-related quotas on performed treatments:** A percentage input field set to '%'. There is a search bar and a close button for this section.
- Supervisor:** A search bar with a magnifying glass icon and a close button.

At the bottom of the window, there are 'Print' and 'Help' buttons. On the right side, there is a list view showing 'ID PRACTITIONER #1'.

PATIENT ARCHIVE

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

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

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

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

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

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

PLANNING WEEKLY / DAILY

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

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

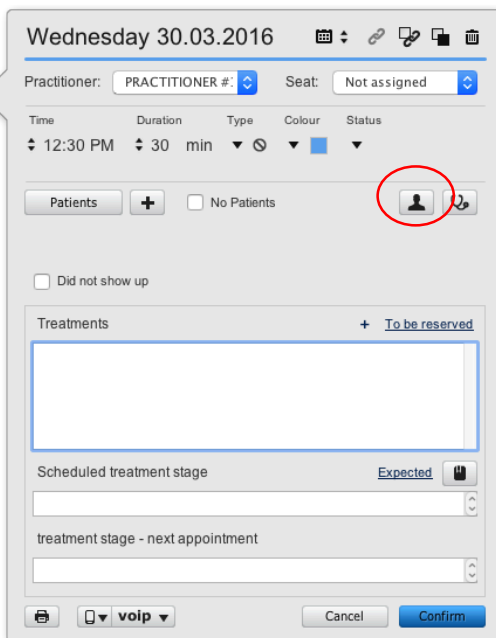
Depending on the type of clinic organization, choose the desired planning.

The window Weekly / Daily Planning is displayed at time intervals of 15 minutes that allow the assignment of appointments (configurable option in the preferences).

To insert a new appointment, double-click with the mouse on the time match desired. It opens a detailed window "appointment" that lets you choose the patient among those in the database through the "Patients" button, or enter a new one using the "+" button.

You can also specify the duration of the appointment and performance planned, i.e. the type of treatment to be performed on the patient.

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



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

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

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

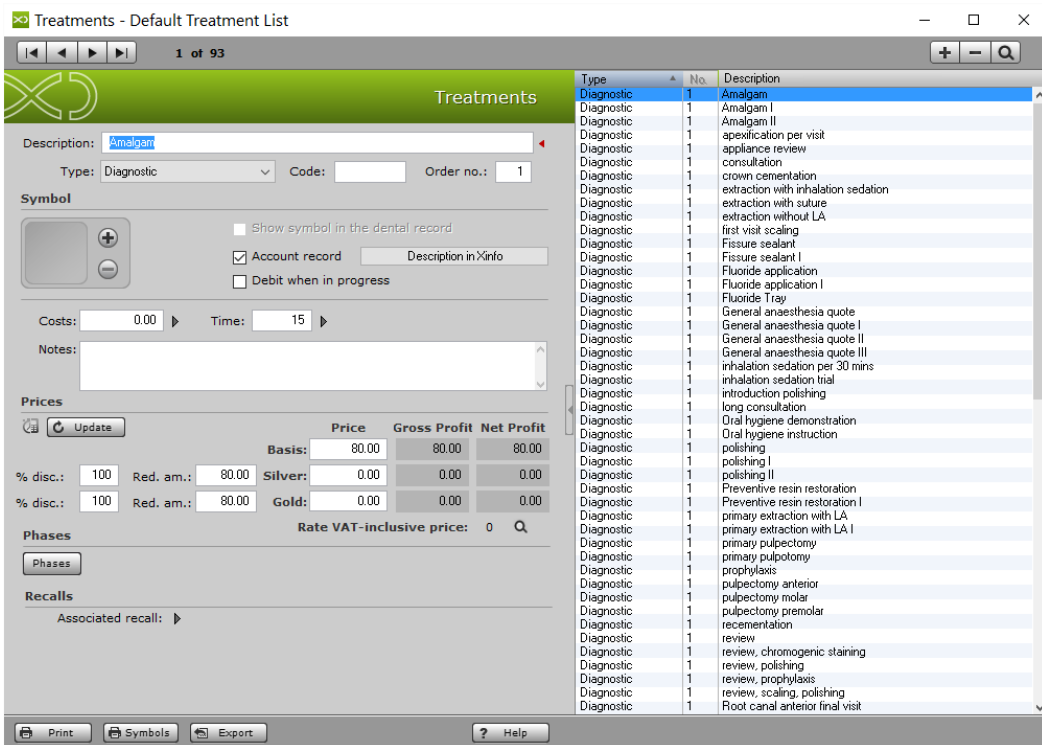
There is also a search function for the first available appointment. It is activated via the button "New App." in the left bar of the Schedule. It automatically detects the list of possible appointment available, depending on the patient's needs.

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

TREATMENTS – Default Treatment List

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

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



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

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

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

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

The screenshot displays the Xdent software interface for patient Dicapio. The top left shows the patient's name and age (14 years). The main area features a dental chart with teeth numbered 11 through 48. Teeth 11 and 44 are highlighted in blue and green respectively. Below the chart is a table titled "26/02/2016 Default treatment proposal" with the following data:

Pr.	Type	Tooth	Treatment	Timing	Amount	Status	Date	Practitioner	App. Date	Diagn. pr.
1	Diagnostic		simple removable appliance	30	500.00	●	2/3/2016	PRACTITIONER #1		PRACTITIONER #1
2	Diagnostic		Tooth colored primary crown	30	500.00	●	2/3/2016	PRACTITIONER #1		PRACTITIONER #1
3	Diagnostic		Root canal anterior final visit	45	300.00	●	2/3/2016	PRACTITIONER #1		PRACTITIONER #1
4	Diagnostic		review, chromogenic staining	30	100.00	●	2/3/2016	PRACTITIONER #1		PRACTITIONER #1
7	Diagnostic	11	extraction with suture	30	120.00	●	14/3/2016	PRACTITIONER #1		PRACTITIONER #1
8	Diagnostic	44	Root canal anterior first visit	30	300.00	●	15/3/2016	PRACTITIONER #1		PRACTITIONER #1
10	Diagnostic	44	Root canal molar first visit	45	350.00	●	15/3/2016	PRACTITIONER #1		PRACTITIONER #1

The interface also includes a sidebar with medical records (Conservative, Endodontic, Implant, Ortho Ceph, Periodontal), multimedia, status, recall, and treatment plan options. The bottom status bar shows the date 15/3/2016 and buttons for Help, Report, View treatment plans, Cancel, and Confirm.

QUOTATION

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

The screenshot displays the 'Quotations of Razak' software interface. The main window is titled 'Quotations Archive' and shows a list of quotations in a table on the right. The table has columns for 'No.', 'Date', 'Stat.', 'TP Stat.', 'TP payer', and 'Title'. The first row is highlighted in blue and contains the following data: No. 2, Date 15/03/16, Stat. (a blue circle icon), TP Stat. (empty), TP payer (empty), and Title Quote 1.

The main form area on the left contains the following information:

- Title: No.: 2 Date: 15/03/16
- User: Administrator Amount: 980.00
- Patient: Pending
- Financing charges: fixed 0.00 % 0.00 Total cost: 0.00
- Variable data section with a dropdown menu for 'Practitioner' and a list of fields: Patient, Date, Quot. no., Quot. name, Practice logo, Ref. Doctor, Ref. Sales.
- A large text area containing a dental treatment plan. It features a diagram of two dental arches (upper and lower) with tooth positions numbered 1-16 and 17-32. The text below the diagram lists treatments and amounts:
 - UPPER DENTAL ARCH**
 - Treatment: 23 Root canal anterior first v... Amount: Ringgit300.00
 - 23 scaling and polishing Amount: Ringgit80.00
 - 18 Root canal anterior first v... Amount: Ringgit300.00
 - LOWER DENTAL ARCH**
 - Treatment: 45 Root canal anterior first v... Amount: Ringgit300.00
- Quotation total amount Ringgit 980.00
- Date: 15/3/2016
- PAYMENT MODE**
 - Deposit: 400.00
 - No. instalments: 1 When treatment plan is completed:580.00
 - Due date: completed treatment

At the bottom of the window, there are buttons for 'Print', 'Send email', 'Quotation delivered', and 'Recreate due dates'.

ACCOUNTING DATA

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

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

See more details in Section INVOICES

Scheda Contabile

Campisi Alessia Situazione contabile: **0,00** € Saldi del piano corrente

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

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

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

Num.	Data	Importo	Acconto	Pag.

Data	Importo

Data	Importo

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

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

MEDICAL HISTORY

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

The screenshot shows a software window titled "Questionnaire Settings" for a "medical history questionnaire". The window contains a table of questions and a configuration area at the bottom.

N.	Question	Type
1	Are you fit and healthy?	Yes/No
2	Are you seeing any doctor for any condition currently or within the last 3 months?	Yes/No
3	Have you been hospitalized before?	Yes/No
4	Are you taking any medication?	Yes/No
5	Do you have any drug allergy?	Yes/No
6	Do you have any other allergies?	Yes/No
7	Are you suffering from heart conditions?	Yes/No
8	Are you suffering from lung diseases?	Yes/No
9	Are you suffering from liver problems?	Yes/No
10	Do you have hepatitis A/B/C, or are you a carrier?	Yes/No
11	Are you suffering from kidney problems?	Yes/No
12	Do you have developmental problems?	Yes/No
13	Do you have any other conditions not mentioned above?	Yes/No
14	If you are female, are you pregnant?	Yes/No

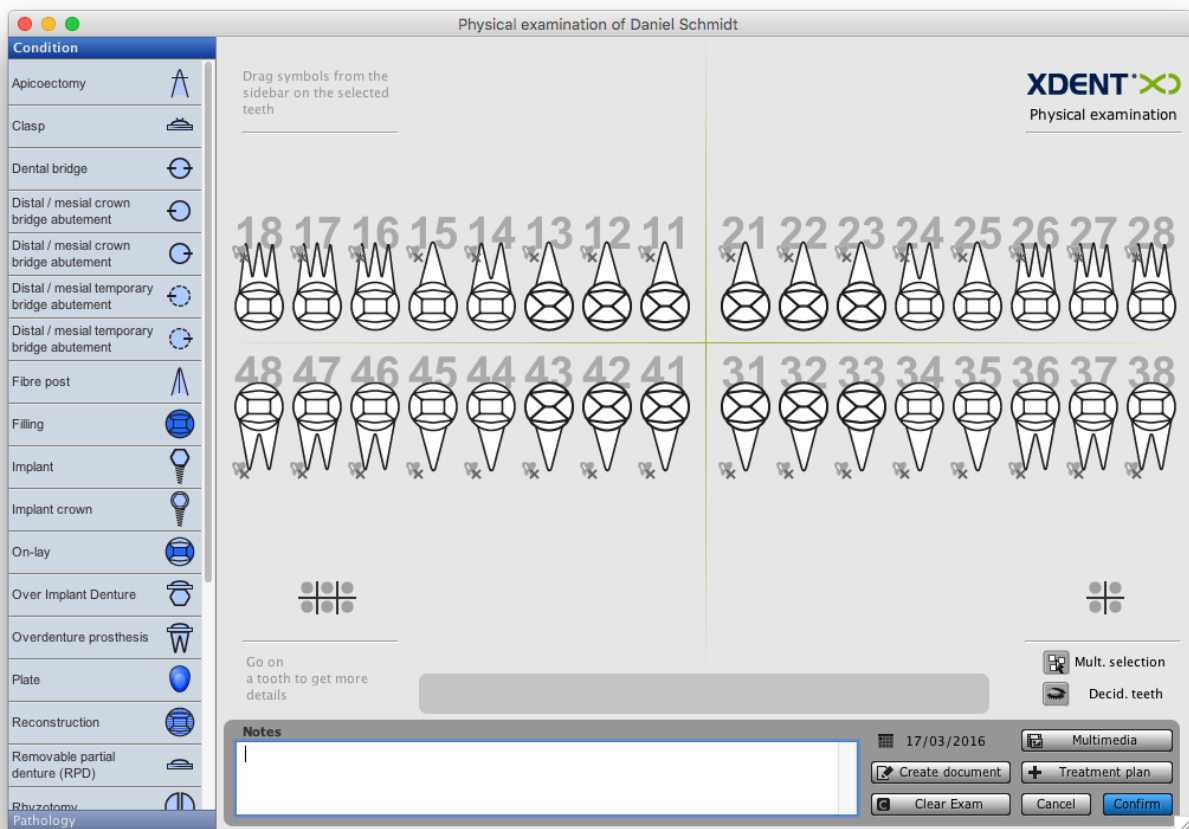
Below the table, there is a configuration area for editing a question:

Order no.: Question:

Answer type: Yes/No Yes/No + notes Open-ended question

PHYSICAL EXAM

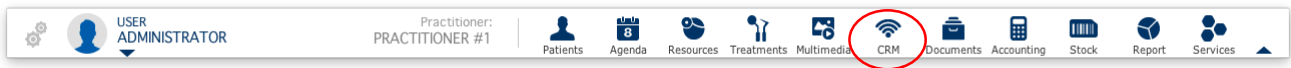
The function **PHYSICAL EXAM** allows you to document the state of the mouth detected at the first visit by the doctor.



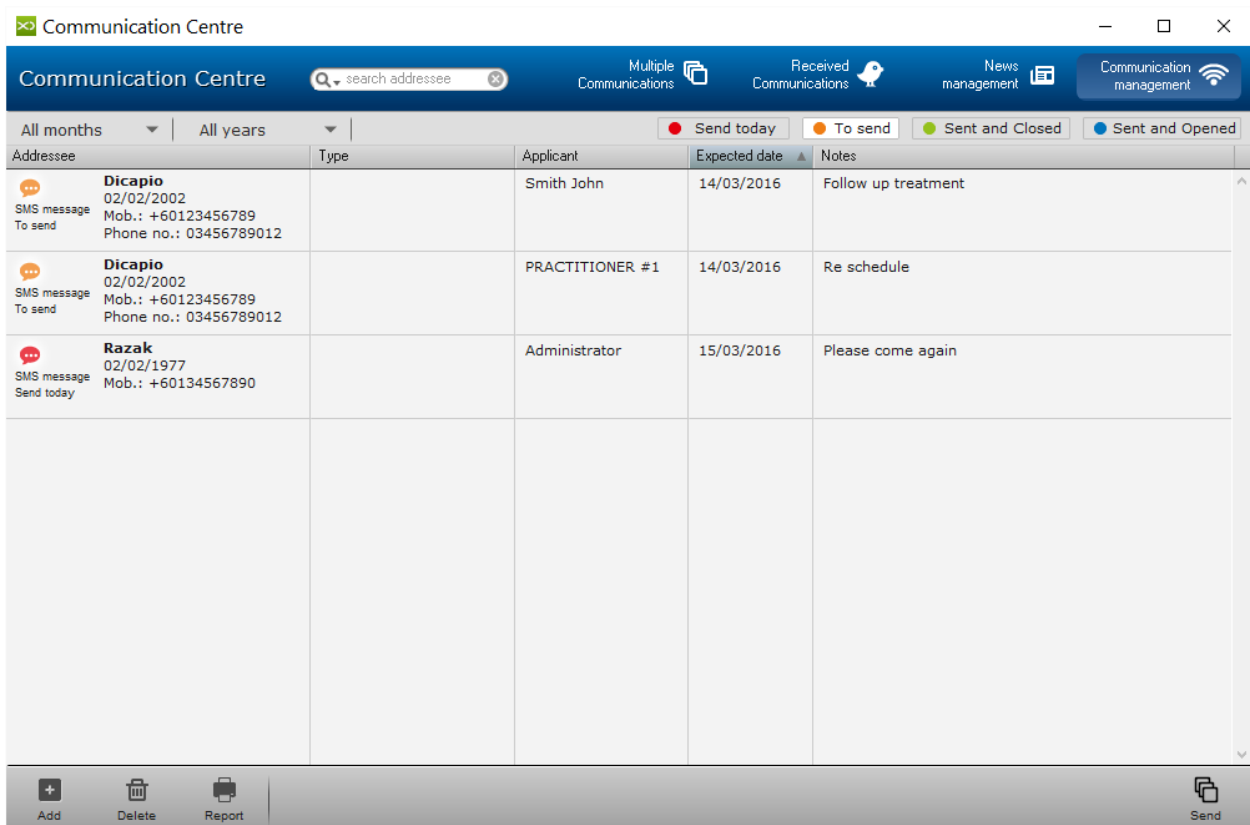
The diseases and states can be dragged onto the teeth by the symbols on the bar left. When done, click 'Create Document' to print and/or archive the status electronically.

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

CRM



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



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

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

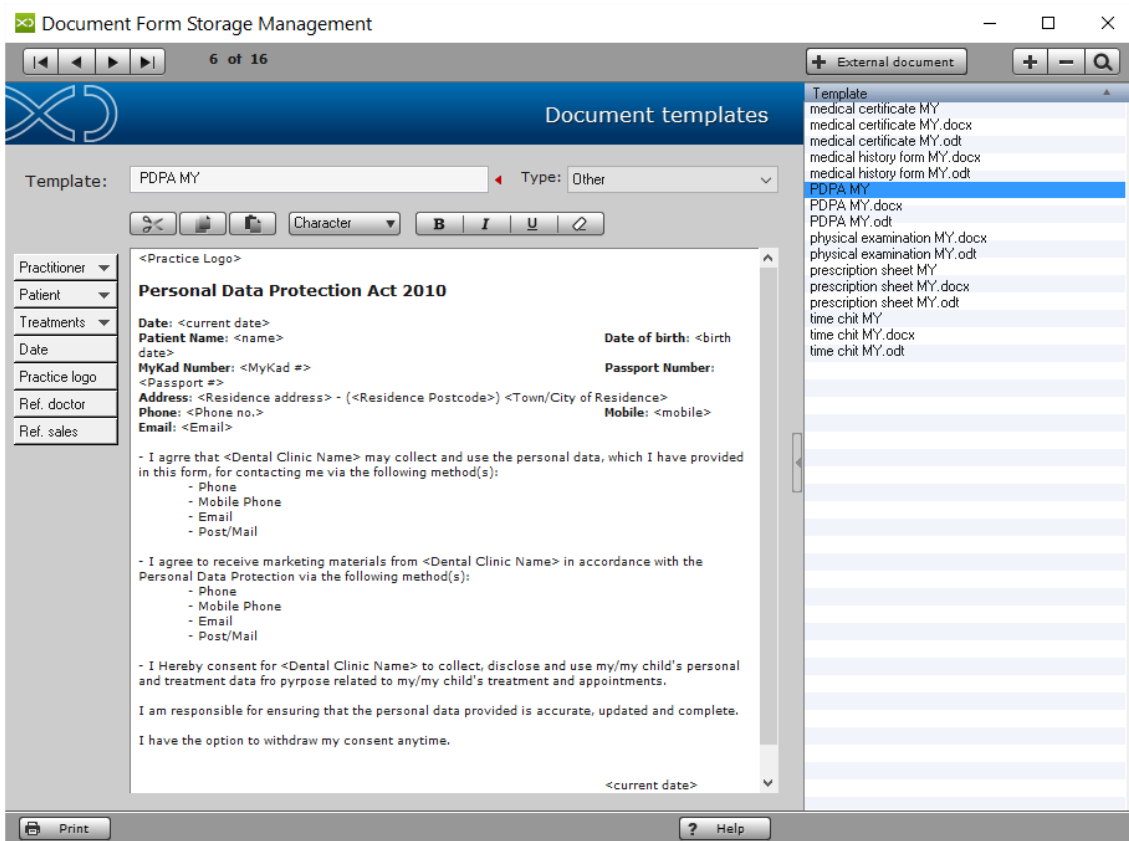
XINFO, the patient App available, will save you costs for sms as messages are directly sent to the patients App at no charge.

DOCUMENTS

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

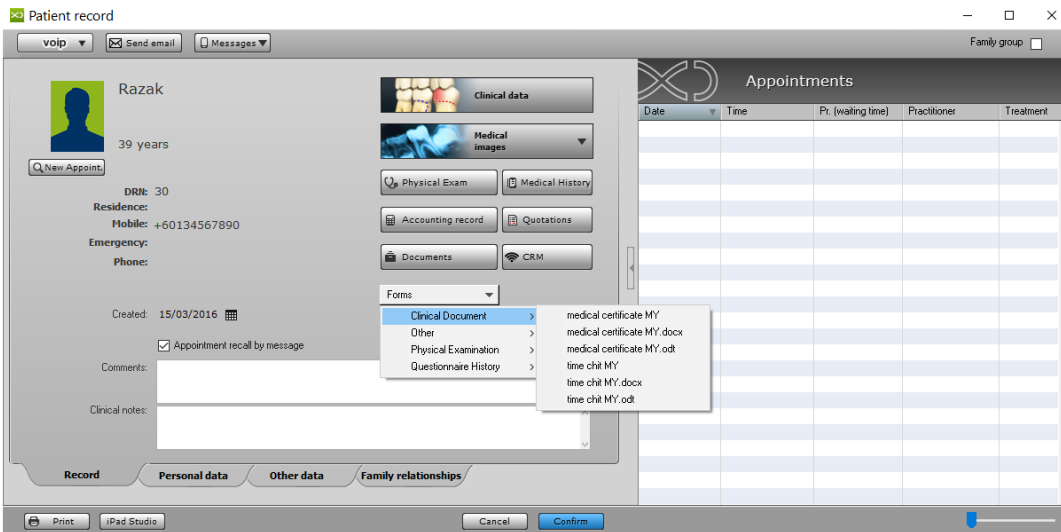
The documents are issued by the button "Forms" present in the Patient Record and they can be stored.

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



FORMS

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



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



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

STATISTICAL REPORTS

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

The reports are divided into:

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

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

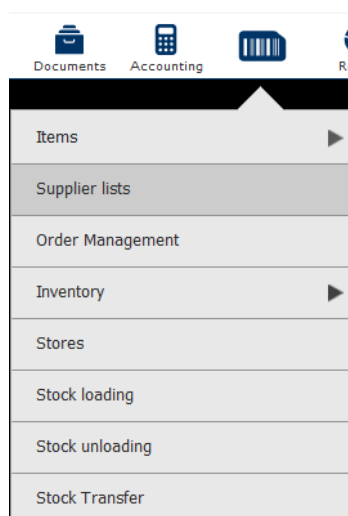
Reports can also be obtained in graphic form and results can be exported to Excel data sheets for a possible post-process

STOCK

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

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

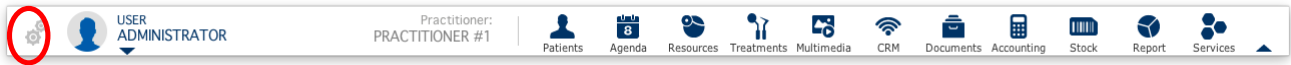
It is also possible to access the inventory study from STOCK / INVENTORY menu.



PREFERENCES XDENT

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

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



CONCLUSION

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