User's Guide

Appointment Workflow

Formalise the workflow, standardise procedures, resell services, retain patients

Contents

Configuring Appointment Workflow .................................................................................................. 3
Using Appointment Workflow ........................................................................................................... 4
Overview of Appointment Workflow ................................................................................................. 5

Appointments Workflow / Departure Task List ................................................................................. 6

Overview of Appointment Workflow ................................................................................................. 8
Purpose of Appointment Workflow ...................................................................................................... 8
Benefits of Appointment Workflow .................................................................................................... 9
Features of Appointment Workflow .................................................................................................... 10
Requirements for Appointment Workflow ......................................................................................... 12
Using Appointment Workflow ........................................................................................................... 13
Clinical workflow (IMPORTANT to understand) .................................................................................. 14
The Appointment Workflow Compliance Report ............................................................................ 15
Generating the Appointment Workflow Compliance Report .......................................................... 15
Interpreting the Appointment Workflow Compliance Report ....................................................... 16
Provider tasks in the Patient Retention workflow ........................................................................... 18
Moving the patient to the Chair ........................................................................................................... 18
Moving the patient to Departure ......................................................................................................... 19
Specifying Treatment Appointments for Departure ........................................................................ 20
Option to print the Invoice .................................................................................................................. 21
Specifying Recall Appointments for Departure ............................................................................. 21
Receptionist tasks in the Appointment Workflow ............................................................................ 22
Tasks overview ................................................................................................................................... 22
Receptionist tasks ............................................................................................................................... 22
Managing the Departure Task List ..................................................................................................... 23
Using the Departure Task List ........................................................................................................... 25
Marking an appointment as Completed ............................................................................................. 27
Adding Departure List appointments to Short Notice List (v11.3) ................................................ 30
Scheduling Planned Appointments from Departure ........................................................................ 31
Scheduling Recall appointments from Departure .............................................................................. 33
Processing Payments from Departure ............................................................................................... 34
Recording Patient Details from Departure ......................................................................................... 35
Processing Custom Tasks from Departure ....................................................................................... 36
Configuring Appointment Workflow ................................................................................................ 37
Accessing the Appointment Workflow Wizard ................................................................................ 38
Configuring the Departure List .......................................................................................................... 39
Configuring Planned Treatment Appointment ............................................................................... 41
Configuring Recall Appointments .................................................................................................... 43

Appointment Workflow, EXACT v10.16  rev 2, 28 February 2013  Page 3 of 52
List of Procedures

To generate the Appointment Workflow Compliance Report .......................................................... 15
To interpret the Appointment Workflow Compliance Report ......................................................... 16
To move a patient to the Chair for treatment .................................................................................. 18
To move a patient to Departure ..................................................................................................... 19
To manage the Departure Task List ............................................................................................. 23
To use the Departure Task List ................................................................................................... 25
To open the patient record .......................................................................................................... 25
To mark this appointment as complete ....................................................................................... 25
To view patient summary tooltip ................................................................................................. 25
To view a treatment summary tooltip ......................................................................................... 26
To edit an appointment in the Edit Appointment window ............................................................ 26
To assign an appointment to the Appointment Book .................................................................... 26
To open an Appointment Time Search window ........................................................................... 26
To open the first available appointment slot in the Appointment Book ........................................... 27
To mark an appointment as completed ....................................................................................... 27
To remove a patient from the Departure pane and mark the appointment as complete .......... 27
To add an appointment to the Short Notice List directly from the Departure List (v11.3) .... 30
To schedule an appointment - Drag and Drop ........................................................................... 31
To schedule an appointment - Edit option ................................................................................... 31
To schedule an appointment - Time Search option .................................................................... 32
To schedule an appointment - First available time option ............................................................ 32
To schedule a Recall appointment ............................................................................................... 34
To process a payment from the Departure List ......................................................................... 34
To record patient phone number and/or Email address from the Departure List ...................... 35
To process a customised task from the Departure List ............................................................... 36
To configure automated prompts in the Departure List that the Receptionist needs to act upon ........................................................................................................................................ 37
To access the Appointment Workflow Wizard ........................................................................... 38
To configure the Departure Details screen ................................................................................... 39
To configure Planned Treatment Appointment departure tasks .................................................. 41
Typographical Conventions

It is important to understand the terms and typographical conventions used in this documentation.

The following kinds of formatting in the text identify special information.

<table>
<thead>
<tr>
<th>Formatting convention</th>
<th>Type of Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>To perform...</strong></td>
<td>Follow these step-by-step procedures to complete a specific task.</td>
</tr>
<tr>
<td><strong>Bold</strong></td>
<td>Items to select, such as menu options, command buttons, or items in a list.</td>
</tr>
<tr>
<td><strong>Emphasis</strong></td>
<td>Emphasizes the importance of a point or for variable expressions such as parameters.</td>
</tr>
<tr>
<td><strong>CAPITALS</strong></td>
<td>Names of keys on the keyboard. for example, SHIFT, CTRL, or [Alt].</td>
</tr>
<tr>
<td><strong>KEY-KEY</strong></td>
<td>Key combinations for pressing and holding multiple keys, such as CTRL-P, or ALT-F4.</td>
</tr>
<tr>
<td><strong>Tip:</strong></td>
<td>It is useful but not essential to know this.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>Please take note of this point as it will help you to use the system more effectively.</td>
</tr>
<tr>
<td><strong>Important:</strong></td>
<td>Take careful note of this point, as it has implications for health, safety, or system functionality.</td>
</tr>
</tbody>
</table>
### APPOINTMENT WORKFLOW / DEPARTURE TASK LIST

The **Appointment Workflow** provides a Departure Task List for Receptionists to follow with patients departing the dental practice. It primarily facilitates Receptionist booking of patients for continuing appointments but can also be customised to prompt for tasks such as capturing patient details, issuing practice brochures, or informing patients of special offers.

<table>
<thead>
<tr>
<th><strong>Overview</strong></th>
<th>Purpose (see &quot;Purpose of Appointment Workflow&quot; on page 8)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Benefits (see &quot;Benefits of Appointment Workflow&quot; on page 9)</td>
</tr>
<tr>
<td></td>
<td>Features (see &quot;Features of Appointment Workflow&quot; on page 10)</td>
</tr>
<tr>
<td></td>
<td>Requirements (see &quot;Requirements for Appointment Workflow&quot; on page 12)</td>
</tr>
</tbody>
</table>

#### Using
(strategy, screens and procedures)

<table>
<thead>
<tr>
<th><strong>Clinical Workflow</strong> (see &quot;Clinical workflow (IMPORTANT to understand!)&quot; on page 14)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Receptionists and Providers must understand this)</td>
</tr>
<tr>
<td><strong>Workflow Compliance Report</strong> (see “The Appointment Workflow Compliance Report” on page 15)</td>
</tr>
<tr>
<td><strong>Provider tasks in the Workflow</strong> (see &quot;Provider tasks in the Patient Retention workflow&quot; on page 18)</td>
</tr>
<tr>
<td><strong>Moving the patient to the Chair</strong> (on page 18)</td>
</tr>
<tr>
<td><strong>Moving the patient to Departure</strong> (on page 19)</td>
</tr>
<tr>
<td><strong>Receptionist tasks in the Workflow</strong> (see &quot;Receptionist tasks in the Appointment Workflow&quot; on page 22)</td>
</tr>
<tr>
<td><strong>Managing the Departure List</strong> (see &quot;Managing the Departure Task List&quot; on page 23)</td>
</tr>
<tr>
<td><strong>Using the Departure List</strong> (see &quot;Using the Departure Task List&quot; on page 25)</td>
</tr>
<tr>
<td><strong>Marking an appointment Completed</strong> (see &quot;Marking an appointment as Completed&quot; on page 27)</td>
</tr>
<tr>
<td><strong>Scheduling Appointments</strong> (see &quot;Scheduling Planned Appointments from Departure&quot; on page 31)</td>
</tr>
<tr>
<td><strong>Scheduling Recalls</strong> (see &quot;Scheduling Recall appointments from Departure&quot; on page 33)</td>
</tr>
<tr>
<td><strong>Processing Payments</strong> (see &quot;Processing Payments from Departure&quot; on page 34)</td>
</tr>
<tr>
<td><strong>Recording Patient Details</strong> (see &quot;Recording Patient Details from Departure&quot; on page 35)</td>
</tr>
<tr>
<td><strong>Processing Custom Tasks</strong> (see &quot;Processing Custom Tasks from Departure&quot; on page 36)</td>
</tr>
</tbody>
</table>

#### Configuring
(setting up and customising)

<table>
<thead>
<tr>
<th><strong>Configuration</strong></th>
<th>(see &quot;Configuring Appointment Workflow&quot; on page 37)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Workflow Wizard</strong></td>
<td>(see &quot;Accessing the Appointment Workflow Wizard&quot; on page 38)</td>
</tr>
<tr>
<td><strong>Departure Details</strong></td>
<td>(see &quot;Configuring the Departure List&quot; on page 39)</td>
</tr>
<tr>
<td><strong>Planned Treatments</strong></td>
<td>(see &quot;Configuring Planned Treatment Appointment&quot; on page 41)</td>
</tr>
<tr>
<td><strong>Recalls</strong></td>
<td>(see &quot;Configuring Recall Appointments&quot; on page 43)</td>
</tr>
<tr>
<td><strong>Payments</strong></td>
<td>(see &quot;Configuring Payment Processing&quot; on page 44)</td>
</tr>
<tr>
<td><strong>Contact Details</strong></td>
<td>(see &quot;Configuring Contact Details&quot; on page 46)</td>
</tr>
<tr>
<td><strong>Custom tasks</strong></td>
<td>(see &quot;Configuring Custom departure tasks&quot; on page 47)</td>
</tr>
</tbody>
</table>
Resources

Video - Appointment Workflow
(requires SOE Portal Login)

Online version of this user guide (may have more recently-updated information)

Looking for the departure list procedures?

See: Using the Departure List (see "Using the Departure Task List" on page 25).
Overview of Appointment Workflow

This Overview section includes introductory information:

Purpose of Appointment Workflow (on page 8)
Benefits of Appointment Workflow (on page 9)
Features of Appointment Workflow (on page 10)
Requirements for Appointment Workflow (on page 12)

Purpose of Appointment Workflow

Continuous oral health in a cycle of treatment
Appointment Workflow facilitates a continuous cycle of treatment, to the benefit of both the practice and the patients.

Current patients are a primary market
Current patients comprise a productive target market for reselling services because the practice already have a relatively intimate relationship with them based on a degree of trust, the sales cycle for reselling is exceptionally short, and the effort to prospect for further business from existing patients is minimal.

Retaining patients by means of automated workflow
The Appointment Workflow facility enables a practice to

- Retain patients for further oral health work by ensuring that they always have future appointments booked.
- Automate the practice workflow for retaining patients.
- Define and integrate the required Provider (Dentist, Hygienist) and Receptionist tasks within the workflow.
- Track participant compliance in the workflow and produce reports on compliance.
- Continuously improve Appointment Workflow by viewing and acting on relevant compliance report statistics.

Primary utility is a configurable Departure List
The primary means of actioning Appointment Workflow is a Departure List on the Main screen. This Task List is configured by means of an Appointment Workflow (see "Accessing the Appointment Workflow Wizard" on page 38) wizard that specifies required departure tasks that the Receptionist must carry out:
Prompting for custom options

Besides standard tasks, the Appointment Workflow facility can require the Receptionist to perform further custom tasks such as:

- To wish the patient Happy Birthday for any birthdays within the following week.
- To issue a brochure on practice special offers for the next 6 months.
- To issue a list of services offered by the practice.
- To discuss discounts offered for patient referrals.
- To direct patients to the comprehensive practice website where they can view special offers and be further educated on the benefits of various dental services.
- To sign-up the patient for a newsletter.
- To request the patient complete an evaluation form on the practice's customer service.

Benefits of Appointment Workflow

Free

Appointment Workflow does not require licensing and is included in the standard EXACT software from version 10.16.

Increase income

Increase practice income by marketing further services to your patients while they are still on the practice premises. This is a highly effective means of reselling standard services, and selling value added peripheral services and products.

Furthermore, because the Appointment Workflow strategy integrates marketing strategies directly in the practice workflow, practice personnel become generally more marketing-aware, with further benefits to the practice.

Automation saves time

Save time with an Appointment Workflow that automatically integrates the screen inputs of all participants (this is not possible by means of a paper-based workflow).

Quick information capture for busy Receptionists

The software enables quick information capture without the need to manually open patient records. For example:

- Enter Email and Phone details in a popup screen.
- Drag appointments directly into the Appointment Book.

Commit patients to long term oral health

Optimise patients' oral health by effectively committing them to ongoing treatment.
Systematic standard procedure for departure

The Departure workflow defines a consistent, systematic professional standard procedure, against which all participants are measured in their degree of compliance.

Measurement enables continuous improvement

("You can only effectively improve that which you can properly measure").

All workflow tasks are audited per participant, and by means of a compliance report (see "Generating the Appointment Workflow Compliance Report" on page 15), you can track participant compliance to the workflow. This objective measure can be used for multiple purposes including performance improvement, reason or evidence for disciplinary action, identification of training needs, and identification of operational bottlenecks.

Flexibly optimise the departure process

Because the configuration wizard allows for custom options (see "Configuring Custom departure tasks" on page 47), you have the flexibility to creatively optimise the departure workflow.

Receptionist does not need to leave the Main screen

The Departure List displays as a pane in the Main screen, so there is no need for Receptionists to leave this screen in performing the required tasks.

Use as a training aid for new staff

The Departure List provides strong guidelines and establishes good habits in new staff.

---

**Features of Appointment Workflow**

**Free**

Appointment Workflow is included with EXACT software from version 10.16 onwards.

**Triggers and constraints by role enforce a standard procedure**

The Appointment Workflow depends on specific sequential actions from both Receptionists and Providers.

The Receptionist must accept the patient into the workflow so that <exact> knows that the patient is being processed, and can then make possible further Appointment Workflow functions.

The patient can only be moved to the chair by the Provider to whom that patient has been assigned in the appointment book. This ensures that the patient only comes to the chair when that Provider is ready.

The Provider must move the patient to the chair (in the software), so that <exact> understands the patient has left Reception and is with the Provider, and then makes possible the software functions such as Charging and Move to Departure.

**Easy to vary the aggressiveness of the patient resell and retention strategy**

The Appointment Workflow is configurable across various parameters, so a practice can vary the aggressiveness of its patient resell and retention strategy.

**Automated prompts**

For each stage of the workflow, automated prompts ensure that personnel do not overlook Appointment Workflow tasks. For example,

- During charting, when they create patient treatments, Providers are prompted to set appointment requirements.
During patient departure, Receptionists are prompted to actually schedule these appointment requirements.

Workflow auditing
All prompted tasks are audited against user names. For example, if a Dentist fails to set an appointment requirement when prompted to do so, it will be recorded as a workflow failure against that Dentist's name.

Workflow reporting
The Appointment Workflow Compliance Report (see "Generating the Appointment Workflow Compliance Report" on page 15) provides valuable analysis of Appointment Workflow success, and identifies instances where there was a failure to complete the Appointment Workflow. The report can be scheduled, exported to .CSV format, and it can be set as a favourite for quick access.

Custom tasks
Custom tasks can be configured for the Departure tasklist. For example,

- Issue patient with practice services brochure.
- Check if patient is registered with the practice website.

Departure List on the Main screen
A Departures task list integrates with appointment books, and lists the tasks for the Receptionist to complete during a patient’s departure.

For example, here the Receptionist is viewing a task to issue a brochure:
Requirements for Appointment Workflow

Appointment Workflow does not require licensing, and is included in the standard EXACT software.

Software version
EXACT version 10.16 or later.

Understanding of the actions required by Receptionist and Provider

The Appointment Workflow depends on specific sequential actions from both Receptionists and Providers.
If the Receptionist fails to accept the patient into the workflow, <exact> does not know that the patient is being processed, so further Appointment Workflow functions are not possible.
A patient can only be moved to the chair by the Provider to whom that patient has been assigned in the appointment book (not by the Receptionist, nor by another Provider).
If the Provider fails to move the patient to the chair (in the software), <exact> understands the patient to still be waiting in Reception, and software functions such as Charging and Move to Departure are consequently not possible.

Configuration

- Specify the default recall services by means of Configure > Recalls.
- Appointment Workflow only uses the multi-column appointment book, which must be enabled in Configure > Practice settings > Appointment Books:

  ![Appointment Books](image)

  - Within Appointment Books you also need to Enable Appointment Workflow (shown above), as this is disabled by default (by default there is therefore no Departure List).
  - The Appointment Workflow must be correctly configured by means of an Appointment Workflow Wizard (see "Accessing the Appointment Workflow Wizard" on page 38) before it becomes operational in the Provider workflow and will appear as a Departure task list (see "Managing the Departure Task List" on page 23) on the Main screen.

Important: What you can see and do in the software interface depends on your role within the work flow and your access rights in the system. So if you try to click a button to perform an action and nothing happens, it may be because you have the wrong role for performing that action, or you don’t have rights to perform it. For example, a Dentist can see the patient retention Departure Task List on the Main screen, but cannot perform these tasks because as per the configuration, they are handled only by the Receptionist role.
Using Appointment Workflow

The roles of participants in the Appointment Workflow are strongly differentiated and defined:

As an introduction we’ll first look at the clinical workflow (see "Clinical workflow (IMPORTANT to understand!)" on page 14) before considering

- **Provider tasks in the Appointment Workflow** (see "Provider tasks in the Patient Retention workflow" on page 18)
- **Receptionist tasks in the Appointment Workflow** (on page 22)

Once a history of actions is established, the Appointment Workflow Compliance Report (see "Generating the Appointment Workflow Compliance Report" on page 15) can be used to determine the degree of compliance to the defined tasks, and ultimately may be a useful tool in continuously improving the Appointment Workflow effort.

**Important**: What you can see and do in the software interface depends on your role within the workflow and your access rights in the system. So if you try to click a button to perform an action and nothing happens, it may be because you have the wrong role for performing that action, or you don’t have rights to perform it. For example, a Dentist can see the patient retention Departure Task List on the Main screen, but cannot perform these tasks because as per the configuration, they are handled only by the Receptionist role.
## Clinical workflow (**IMPORTANT to understand!**)

The primary participants in the workflow are Patient, Provider (Dentist or Hygienist), and Receptionist.

The workflow follows patient processing, and software stages are triggered by changes in patient status.

**NOTE:** **EXACT** must be informed at which stage the patient is within the workflow by means of the patient status:

- **Arrived** ➔ **In the Chair** ➔ **Departure**

All software procedures are enabled by these stages, so failure to "inform" **EXACT** of the stage will inhibit the possible software tasks for the following stages.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Practitioner Tasks</th>
<th>Cautions per stage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patient arrives in reception</strong></td>
<td>Receptionist clicks in the Appointment Book to accept the patient into the workflow. Resulting symbol: <img src="image" alt="Mr John West" /></td>
<td>If the Receptionist fails to accept the patient into the workflow, <strong>EXACT</strong> does not know that the patient is being processed, so further Appointment Workflow functions are not possible.</td>
</tr>
<tr>
<td><strong>Patient is moved to chair by Provider and treated by Provider</strong></td>
<td>Provider notices waiting patient symbol. When ready, Provider moves patient to chair (see &quot;Moving the patient to the Chair&quot; on page 18) (in the software). Resulting symbol: <img src="image" alt="Mr John West" /></td>
<td>A patient can only be moved to the chair by the Provider to whom that patient has been assigned in the appointment book.</td>
</tr>
<tr>
<td></td>
<td>&lt;exact&gt; then enables the Provider tasks. Provider is then able to perform tasks (see &quot;Provider tasks in the Patient Retention workflow&quot; on page 18): Specify the treatment appointments (see &quot;Specifying Treatment Appointments for Departure&quot; on page 20) or recalls (see &quot;Specifying Recall Appointments for Departure&quot; on page 21) required. Then Provider moves patient to Departure (see &quot;Moving the patient to Departure&quot; on page 19) (in the software). Resulting symbol: <img src="image" alt="Mr John West" /></td>
<td>If the Provider fails to move the patient to the chair (in the software), &lt;exact&gt; understands the patient to still be waiting in Reception, and software functions such as Charging and Move to Departure are consequently not possible.</td>
</tr>
<tr>
<td><strong>Patient departs through reception</strong></td>
<td>This causes the Departure Task List (see &quot;Managing the Departure Task List&quot; on page 23) to appear in the Main tab (MultiColumn Appointment book only), with tasks based on Appointment Workflow configuration and Provider specifications. <img src="image" alt="Departure Task List" /> Receptionist tasks (see &quot;Receptionist tasks in the Appointment Workflow&quot; on page 22): Receptionist processes departure tasks.</td>
<td>The patient’s details will not show in the Departure Task List, and the Receptionist will not be able to process via the Departure Task List if The patient was not moved to the chair in <strong>EXACT</strong> software, - and / or - The patient was not moved to Departure in <strong>EXACT</strong> software.</td>
</tr>
</tbody>
</table>
Audit Trail and Report

Provider and Receptionist actions are tracked by the system, and an Appointment Workflow Compliance Report (see "Generating the Appointment Workflow Compliance Report" on page 15) shows their degree of compliance to the workflow.

Because compliance is measurable, it can be improved, to the benefit of both patients and practice.

The Appointment Workflow Compliance Report

Generate (see "Generating the Appointment Workflow Compliance Report" on page 15) and interpret (see "Interpreting the Appointment Workflow Compliance Report" on page 16) this report to track statistics on how well your practice has kept to the configured Appointment Workflow.

This new report is part of the Practice Management category group and it has the following description: "Review number and percentage of appointments completing the required workflow with failures reported by workflow actions, users and patients."

Tip: Use the Preview feature for a quick on-screen view of the report.

Report requirements

- The report will only be displayed in the reports list when the Appointment Workflow feature is enabled.
- It requires an historical audit trail (actions by participants) for data.

Report features

It can be

- Set as a favourite for quick access.
- Scheduled.
- Previewed on the screen.
- Printed.
- Exported to .CSV format, which can then be viewed in spreadsheets such as Microsoft Excel.
- Emailed.

Generating the Appointment Workflow Compliance Report

To generate the Appointment Workflow Compliance Report

1. Select Administration > Reports

2. Select Appointment Workflow Compliance from the list of reports:
After a few seconds the report configuration screen displays:

3. Configure the fields, then select either Print, Preview, Email or Export.

Report format:

Interpreting the Appointment Workflow Compliance Report

To interpret the Appointment Workflow Compliance Report

Report logic

Compliance is shown by the number and percentage of patients that *unsuccessfully* completed the actions in their departure list, split by each action line.

The number of reported action items depends on

- The practice setup in the configuration wizard and the items that were *required to be completed* per patient.
- The remaining options are Mobile Number not Collected, Email Address not Collected and Custom Option not Completed.
Failure to comply is reported where patients did not complete departure actions on that day.

**Important:** Each appointment’s actions are checked for completion on the same day as the appointment, so any action postponed to another day will be audited as incomplete / failed. For example, if the patient had an appointment on Monday but came back on Tuesday to make a payment, the report won’t record the payment as completed. **So, if you have to postpone an action, try to postpone it for later on the same day.**

**Report layout**

*Report parameters*

<table>
<thead>
<tr>
<th>Total Appts</th>
<th>No. of Appts</th>
<th>% of Appts</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

*Report summary*

- In 2 appointments there were no dentist recalls booked, and in both (100%), the Receptionist failed to book a recall.
- In 2 appointments there were unprocessed payments, and in 34% of the 6 Total appointments the Receptionist failed to process the payments that were configured as required.
- In 50% of the 6 Total appointments the Receptionist failed to record Mobile Number, and in 84% failed to record Email addresses.
- In 67% of the 6 Total appointments the Receptionist failed to meet the Custom tasks required.

*Details of failed workflows*

<table>
<thead>
<tr>
<th>Appointment Date</th>
<th>Appointment Time</th>
<th>Receptionist</th>
<th>Mobile Phone</th>
<th>Email</th>
<th>User</th>
<th>Custom Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>26/05/2012</td>
<td>06:00am</td>
<td>Failed</td>
<td></td>
<td></td>
<td>T1</td>
<td>Test</td>
</tr>
<tr>
<td>26/05/2012</td>
<td>10:00am</td>
<td>Failed</td>
<td></td>
<td></td>
<td>T1</td>
<td>Test</td>
</tr>
<tr>
<td>29/05/2012</td>
<td>11:00am</td>
<td>Failed</td>
<td></td>
<td></td>
<td>T2</td>
<td>Birthday</td>
</tr>
<tr>
<td>29/05/2012</td>
<td>11:15am</td>
<td>Failed</td>
<td></td>
<td></td>
<td>T2</td>
<td>Birthday</td>
</tr>
<tr>
<td>29/05/2012</td>
<td>01:15am</td>
<td>Failed</td>
<td></td>
<td></td>
<td>T3</td>
<td>Birthday</td>
</tr>
</tbody>
</table>

The percentage column is most telling.

- In 2 appointments there were no dentist recalls booked, and in both (100%), the Receptionist failed to book a recall.
- In 2 appointments there were unprocessed payments, and in 34% of the 6 Total appointments the Receptionist failed to process the payments that were configured as required.
- In 50% of the 6 Total appointments the Receptionist failed to record Mobile Number, and in 84% failed to record Email addresses.
- In 67% of the 6 Total appointments the Receptionist failed to meet the Custom tasks required.

*The Details of Failed Workflows area:*

- Each line represents an appointment with a failed workflow.
- The columns depend on configured parameters.
Provider tasks in the Patient Retention workflow

These tasks relate to the Provider responsibilities in the Clinical workflow per patient (see "Clinical workflow (IMPORTANT to understand!)") on page 14.

<table>
<thead>
<tr>
<th>Provider Task</th>
<th>See:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move a waiting patient to the Chair</td>
<td>Moving the patient to the Chair (on page 18)</td>
</tr>
<tr>
<td>Move waiting patients to Departure. This will advance the patient to the Receptionist within the workflow and call up the Departure List (see &quot;Managing the Departure Task List&quot; on page 23) in the Receptionist's Main screen.</td>
<td>Moving the patient to Departure (on page 19)</td>
</tr>
<tr>
<td>Specify the parameters for the Receptionist to schedule Treatment appointments</td>
<td>Specifying Treatment Appointments for Departure (on page 20)</td>
</tr>
<tr>
<td>Specify the parameters for the receptionist to schedule Recall appointments</td>
<td>Specifying Recall Appointments for Departure (on page 21)</td>
</tr>
</tbody>
</table>

Moving the patient to the Chair

**IMPORTANT:**

A patient can only be moved to the chair by the Provider to whom that patient has been assigned in the appointment book.

EXACT must be informed at which stage the patient is within the workflow by means of the patient status: Arrival - In the Chair - Departure. All software procedures are based on these stages, so failure to "inform" EXACT of the stage will inhibit the possible tasks for the following stages. For example, if the Provider does not register an arrived patient as moved to the chair (in the software), EXACT understands the patient to be sitting in the reception area, so the Provider is then unable to Charge the patient, and the Receptionist is unable to process the patient departure.

To move a patient to the Chair for treatment

1. Double-click the ‘Arrivals Door’ icon: ![Arrivals Door Icon] in the toolbar:

2. From the Patient Preview window, select / highlight the next patient in the list:

   ![Patient Preview Window]

3. Click the Move to Chair button in the Patient Preview window:
This has a number of results:

- This window closes and the patient appears as selected in the user interface.
- If configured as an option (Open Medical History on 'Move to Chair'), the Medical History (tooltip) appears automatically.
- The animated figures on the toolbar now display a stick person in a dental chair, to the left of the Arrivals Door:
- In the Patient Preview window, the stick figure icon changes to a stick person in a dental chair:
- In the Receptionist Appointment Book on the Main screen, the patient booking displays the chair:
- The stick person in the chair represents the patient in your chair and any stick people remaining at the door represent patients who are still waiting:

4. Click the View Patient button to return to the chart window and begin treatment.

**Moving the patient to Departure**

**IMPORTANT:** EXACT must be informed at which stage the patient is within the workflow by means of the patient status: Arrived - In the Chair - Departure. All software procedures are based on these stages, so failure to "inform" EXACT of the stage will inhibit the possible tasks for the following stages. For example, if the Provider does not register an arrived patient as moved to the chair (in the software), EXACT understands the patient to be sitting in the reception area, so the Provider is then unable to Charge the patient, and the Receptionist is unable to process the patient departure.

After treating the patient, Providers need to start the Departure process to trigger the final phase of the Appointment Workflow.

**To move a patient to Departure**

1. **Start** the Departure process by either of these means:
   - Double-click an Appointment to open the Edit Appointment window in which to Specify Treatment Appointments for Departure (see "Specifying Treatment Appointments for Departure" on page 20).
   - or -
   - Select a treatment or appointment and click the Charge button. You will be prompted "Should the patient’s appointment be marked as "Complete?". Select Yes. This will change the icon on the Appointment Book from a patient on a chair to a HAND.
If the Appointment Book sidebar is enabled (under Configure > User Settings > Display sidebar), click the chair icon to complete the appointment. This will change the icon on the Appointment Book from a patient on a chair to a HAND.

2. Follow the prompts for processing the departure. These may include:
   The Appointment Workflow window (see "Specifying Treatment Appointments for Departure" on page 20), in which to specify future appointments, or
   The Set Recalls window (see "Specifying Recall Appointments for Departure" on page 21), if there are no planned treatments.
3. When you complete the move to Departure, the Departure List (see "Managing the Departure Task List" on page 23) appears in the Main screen. The Receptionist deals with the listed tasks (see "Receptionist tasks in the Appointment Workflow" on page 22) to complete the workflow.

Specifying Treatment Appointments for Departure

Appointment planning starts in the Planning Area in the Chart tab:

Once you move the patient to Departure (see "Moving the patient to Departure" on page 19), you will be prompted by means of the Appointment Workflow window to specify appointment details for the incomplete appointments:

- Check if you want the Receptionist to Book this appointment.
- Type an Expected Time that the appointment will take.
- Either accept the default or specify a Booking Interval - a minimum period before the appointment.
- Type any additional Notes for the Receptionist.
These details will display in the **Departure List** (see "Managing the Departure Task List" on page 23) in the Main screen, and will be used by the Receptionist in scheduling the appointment. Notice how the completed fields propagate through to the Departure List in this example:

![Appointment Workflow](image)

**Option to print the Invoice**

For charging, you may be prompted to print the patient Invoice, whether to surgery printer or Receptionist printer:

![Option to print the Invoice](image)

Note that it has a Preview facility, so you can view it online before printing.

**Specifying Recall Appointments for Departure**

Patients who have no planned future treatments may be configured for Recalls by means of the Set Recalls screen, which displays automatically when there are no planned treatments.

Notice how the specified fields in this example propagate to the Departure List, for processing by the Receptionist:

![Specifying Recall Appointments for Departure](image)
Receptionist tasks in the Appointment Workflow

These tasks relate to Receptionist responsibilities in the Clinical workflow per patient (see "Clinical workflow (IMPORTANT to understand!)" on page 14).

Tasks overview

When a Provider advances patients from chair to departure, the receptionist completes tasks in the Departure task list in a pane on the left side of the Main screen, Multiday Appointment Book:

The list contents depend on the particular Appointment Workflow tasks configuration, and on whether treatments are planned for the patient by Providers.

As the Receptionist completes each task, it disappears from the list.

The Appointment Workflow software monitors task completion or failure to complete, and reports in the Appointment Workflow Compliance Report (see "The Appointment Workflow Compliance Report" on page 15).

The Appointment Workflow objective: For Appointment Workflow purposes, the Receptionist's objective is to successfully complete all Departure tasks (remove them from the list) before the patient departs the practice.

Receptionist tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>See:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept the patient into the practice reception by clicking the check box in the Appointment Book. This displays a ‘stick figure’ to indicate the patient has arrived for their appointment.</td>
<td></td>
</tr>
<tr>
<td>When the patient is departing, in the Departure Task List:</td>
<td></td>
</tr>
<tr>
<td>Monitor and manage the Departure List in the Main screen Multiday Appointment Book.</td>
<td>Managing the Departure List (see &quot;Managing the Departure Task List&quot; on page 23)</td>
</tr>
<tr>
<td>Schedule Appointments for the treatments planned and specified by a Provider.</td>
<td>Scheduling Appointments in Appointment Workflow (see &quot;Scheduling Planned Appointments from Departure&quot; on page 31) (See also: Configuring this task (see &quot;Configuring Planned Treatment Appointment&quot; on page 41))</td>
</tr>
</tbody>
</table>
Schedule recalls / appointments for a patient who has no further planned treatments. These recalls would typically be either further services such as bleaching, or a future oral examination.

**Scheduling Recalls in patient retention Appointment Workflow** (see "Scheduling Recall appointments from Departure" on page 33)

(See also: **Configuring this task** (see "Configuring Recall Appointments" on page 43))

Process Payments. These payments by default include all invoiced payments, but depending on the configuration, they may include completed treatments or planned treatments that haven’t yet been invoiced.

**Processing Payments in patient retention Appointment Workflow** (see "Processing Payments from Departure" on page 34)

(See also: **Configuring this task** (see "Configuring Payment Processing" on page 44))

Record patient details (Email address, Mobile Phone) if they haven’t yet been recorded.

**Recording Patient Details in Appointment Workflow** (see "Recording Patient Details from Departure" on page 35)

(See also: **Configuring this task** (see "Configuring Contact Details" on page 46))

Custom task. This may be any kind of task prompt that has been configured for the practice.

**Processing Custom Tasks in Appointment Workflow** (see "Processing Custom Tasks from Departure" on page 36)

(See also: **Configuring this task** (see "Configuring Custom departure tasks" on page 47))

### Managing the Departure Task List

**To manage the Departure Task List**

The Departure List appears as a pane on the left side of the Main screen:

![Departure Task List](image)

It lists required departure tasks that the Receptionist must carry out based on the Appointment Workflow configuration (see "Configuring Appointment Workflow" on page 37), and appointments or recalls required by the Providers. It has various functions built into its compact interface.

Each departure task is displayed in blue text.

By default the tasks can only be completed by a logged in Receptionist user. All actions are tracked, audited, and reported in the **Appointment Workflow Compliance Report** (on page 15), which identifies and tallies failed actions.

**Try to avoid accumulating patients in the Departure List**

If you do not clear the list fast enough, you may have multiple patients displaying in the list:
Booking Intervals and "1st available" time slots

When Providers specify Appointment requirements, they may include booking intervals, which carry through in the EXACT software to the Departure List. For example, in this Departure List the Provider “DEMO” has specified two required appointments, both with booking interval of 7 days.

EXACT has taken into account the duration of the appointment, the availability of the Provider (DEMO), the 7-day booking intervals, and the availability of time slots in the Appointment Book to arrive at "1st available" time slots.

See:

Using the Departure Task List (on page 25)

Departure tasks:

Marking an appointment as Completed (on page 27)

Scheduling Appointments from the Departure Task List (see "Scheduling Planned Appointments from Departure" on page 31)

Scheduling Recalls from the Departure Task List (see "Scheduling Recall appointments from Departure" on page 33)

Processing Payments from the Departure Task List (see "Processing Payments from Departure" on page 34)

Recording Patient Details from the Departure Task List (see "Recording Patient Details from Departure" on page 35)

Processing Custom Tasks from the Departure Task List (see "Processing Custom Tasks from Departure" on page 36)
Using the Departure Task List

To use the Departure Task List

Quick Reference:

- Click to open Patient Details tab
- DRAG to Appointment Book / Click to Edit Appointment
- Click to open Appointment Time Search
- Click to view 1st available timeslot, then DRAG to book
- Click to add to watch list for appointment gaps (v 11)
- Click to process this payment
- Click to open Patient Contact Details screen
- (Customised) Click to view textual reminder/instructions

- Recall can be either or both Dentist (D), Hygienist (H)
- Shows Preferred Provider (Dentist - Eric)
- Shows Recall Service (EX-Exam) and Date

See also:

Further abbreviated procedures listed below, plus:

- Marking an appointment as Completed (on page 27)
- Adding Departure List appointments to the Short Notice List (see "Adding Departure List appointments to Short Notice List (v11.3)" on page 30)
- Scheduling Appointments from the Departure Task List (see "Scheduling Planned Appointments from Departure" on page 31)
- Scheduling Recalls from the Departure Task List (see "Scheduling Recall appointments from Departure" on page 33)
- Processing Payments from the Departure Task List (see "Processing Payments from Departure" on page 34)
- Recording Patient Details from the Departure Task List (see "Recording Patient Details from Departure" on page 35)
- Processing Custom Tasks from the Departure Task List (see "Processing Custom Tasks from Departure" on page 36)

To open the patient record

Click the patient time/name to open the patient record, from where you can carry out standard patient administration.

To mark this appointment as complete

Click the blank checkbox to the left of the patient's appointment time/name to mark this appointment as complete and remove the patient from the Departure List.

This will trigger a compulsory window for you to type the reason for marking this Appointment Complete.

For consequences and a detailed procedure see Marking an appointment as Completed (on page 27).

To view patient summary tooltip

Hover your mouse cursor over the patient name:
To view a treatment summary tooltip

Hover your mouse cursor over the appointment hyperlink:

To edit an appointment in the Edit Appointment window

Click the Appointment hyperlink to open the Edit Appointment window:

To assign an appointment to the Appointment Book

Locate a suitable time and then drag and drop the appointment:

To open an Appointment Time Search window

Click the Search icon to open the Appointment Time Search window, pre-populated with first available times, from where you can Book the appointment.
To open the first available appointment slot in the Appointment Book

In the example below, the Provider "DEMO" has specified a booking interval of 7 days. The first available time is at least 7 days from present, but possibly longer if the Appointment Book is already full over that period:

1. Click the "1st available" hyperlink.
2. Once the appointment slot displays in the Appointment Book, drag the Appointment to the book.

Marking an appointment as Completed

To mark an appointment as completed

In some circumstances you may need to mark the patient appointment as complete whether or not the tasks have been completed. For example, a patient is rushing to another appointment, and asks if he can rather "pop in" the next day to complete the departure administration.

Be aware of these points:

- This removes the Departure List for that appointment.
- Any incomplete tasks will be reported as such in the Appointment Workflow Compliance Report (see "The Appointment Workflow Compliance Report" on page 15).
- This report functions per day, so even if you complete the outstanding tasks the following day or later, they will still be reported as incomplete.
- You have the option to move any outstanding appointment bookings for that patient to the Follow Up area, to be completed at a later specified date / time. If you can postpone to later in the same day, and then complete the task, it will still be audited as a successful completion.

To remove a patient from the Departure pane and mark the appointment as complete

1. Either
   Click the blank checkbox to the left of the patient’s appointment time/name in the Departure Task ListDeparture List:
Click the hand icon in the appointment book:

![Hand icon]

If there are any outstanding actions in the Departure List, this will cause a Departure Check List screen to appear...

2. (If there are outstanding actions) Type a reason for premature completion of the appointment, and then click Continue:

![Departure Check List]

3. If there are outstanding actions, your next step depends on how the Departure List has been configured (see "Configuring the Departure List" on page 39). In this configuration there are 3 options for "Send unbooked appts to the follow up tab":

- **Prompt**: With this configured, EXACT will prompt you "Send unbooked appointments to the follow up tab? Y/N". In other words, you can postpone making the appointments until later.

- **Always**: With this configured, EXACT will always send the unbooked appointments directly to the followup tab.

- **Never**: With this configured, EXACT will skip this step, and not send the appointments to the followup tab.

4. Assuming the configuration is for **Prompt**, you are prompted as in the image above, and you select Yes....

Complete the Follow Up List to define when you will complete the appointments:
Tip: The auditing of task completion functions per day, so if you can postpone the task until later in the same day, and then do complete it, it will still be audited as completed.

The Follow Up appointment will appear in the Follow Up tab at the bottom of the Main screen:

In the Appointment book, the patient appointment will be shown as completed:
Adding Departure List appointments to Short Notice List (v11.3)

(from EXACT version 11.3 onwards)

To add an appointment to the Short Notice List directly from the Departure List (v11.3)

The procedure here is to book the Patient as normal in the Appointment Book, but also to add the appointment to the Short Notice List.

1. If the Provider has not already specified it, ask the patient if they want the appointment to be added to the Short Notice List, to have it as soon as possible.
2. If the answer is YES, check (select) Add to short notice list.
3. To confirm, check that this patient appointment now appears on the Fill Appointment Gaps screen or the Short Notice List tab.
4. Click the 1st Avail hyperlink to display the first available slot in the Appointment Book.

When the available slot displays, drag the Appointment into the Appointment Book.

Summary: If Short Notice gaps prove suitable, this patient will have an appointment at short notice, otherwise they will revert to an appointment as booked in the Appointment Book.
Scheduling Planned Appointments from Departure

Providers specify appointment requirements while they have a patient in the chair. These requirements immediately display in the Departure List when the Provider moves the patient from chair to departure.

As Receptionist, your responsibility is to schedule the appointments.

Be aware of these points:

- You need to consult with the patient.
- The software caters automatically to any specified booking interval (for example, a Dentist may specify a period of at least 7 days before the next appointment).
- EXACT audits all actions per day, so your appointment scheduling should be completed on the same day or the software will record it as a failed action in the Appointment Workflow Compliance Report (see "The Appointment Workflow Compliance Report" on page 15). If you are forced to postpone your appointment scheduling for a patient, then
  - You have the option to Follow Up, for which it would be ideal to follow up later in the same day so that the scheduling action is still recorded as a successful action in the report.
  - You have the option to type a Reason for the postponement, and this reason will appear in the report.

**To schedule an appointment - Drag and Drop**

Locate a suitable time and then drag and drop the appointment:

**To schedule an appointment - Edit option**

Click the Appointment hyperlink to open the Edit Appointment window:
To schedule an appointment - Time Search option

1. Click the Search icon to display the Appointment Time Search

   ![Appointment Time Search](image)

   (These search results are already populated with the appointment details and booking interval specified by the provider.)

2. Edit the fields if necessary and then click the Book button to book the appointment directly from this search window as per current EXACT functionality.

To schedule an appointment - First available time option

1. Click the "1st available time" hyperlink to display the first available time based on the booking interval specified by the Provider (7 days in this case), and the density of bookings during that period.

   ![First Available Time](image)

2. Drag the Appointment hyperlink into that time in the Appointment Book.
Scheduling Recall appointments from Departure

Patients who have no planned future treatments may be configured for Recall.

Recall may be for either or both Dentist (D) and Hygienist (H), and the duration of the appointment is displayed for each:

The preferred Provider is identified by username (D-ERIC refers to Dentist - Eric)

Recall services (EX for Exam) and the recall date (07/07/2012)

The first available slot for this recall is identified. Click to go to this slot in the Appointment Book.

Requirements for Recall actions to display in the Departure List:

- Recalls must be specified as actions in the Appointment Workflow Wizard (see "Accessing the Appointment Workflow Wizard" on page 38)
- The patient requires a recall appointment to be booked.
- There are no planned or scheduled future treatments for the patient. Only after a patient's last treatment is completed will that patient become subject to Recall, so in the Departure List you will never see both Appointment and Recall tasks.

Be aware of these points:

- You need to consult with the patient for the recall appointment.
- All actions are audited per day, so your Recall scheduling must be done on the same day that it appears in the Departure List or the software will record it as a failed action in the Appointment Workflow Compliance Report (see "The Appointment Workflow Compliance Report" on page 15). If you are forced to postpone your Recall scheduling for a patient,
  - You have the option to Follow Up, for which it would be ideal to follow up later in the same day so that the scheduling action is recorded as a successful action in the report.
  - You have the option to type a Reason for the postponement, and this reason will appear in the report.
To schedule a Recall appointment

The functionality is the same as for scheduling Appointments (see "Scheduling Planned Appointments from Departure" on page 31), including:

Hover your mouse cursor over the hyperlink to see details of the Recall.

In this case the specified treatment is an oral examination.

Drag the Recall Appointment directly into the appropriate time in the Appointment Book.

Click the Search icon to open the Appointment Time Search window, pre-populated with first available times, from where you can book the appointment.

Click the "1st available" hyperlink to display that date in the Appointment Book (then drag the Recall Appointment into the book)

Click the blank checkbox ☑ to the left of the patient’s appointment time/name to mark this appointment as complete and remove the patient from the Departure List.

For consequences and a detailed procedure see Marking an appointment as Completed (on page 27).

Processing Payments from Departure

To process a payment from the Departure List

1. Click to open the payment dialog, populated with pre-configured parameters for payments:

2. Process the payment normally.

When completed, this action will be recorded as complete and it will disappear from the Departure Task List.
Recording Patient Details from Departure

To record patient phone number and/or Email address from the Departure List

1. Click to open the Contact Details dialog:

2. Click to add Email address, and complete the fields:
Processing Custom Tasks from Departure

To process a customised task from the Departure List

1. Click the task to open a customised prompt. For example:

   ![Custom Option Example]

2. Complete the required task and then click OK.
   This task will be recorded as complete and it will disappear from the list.
Configuring Appointment Workflow

**To configure automated prompts in the Departure List that the Receptionist needs to act upon**

Access the Appointment Workflow Wizard (see "Accessing the Appointment Workflow Wizard" on page 38) and then configure from the Departure Details screen (see "Configuring the Departure List" on page 39) for any or all of these options:

<table>
<thead>
<tr>
<th>Configuration tasks:</th>
<th>See:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specify the parameters for the Departure List (which standard tasks the Receptionist must process during patient departure), and create custom tasks for the Receptionist to process.</td>
<td>Accessing the Appointment Workflow Wizard (on page 38)</td>
</tr>
<tr>
<td>Prompt the Receptionist to schedule bookings based on the Providers’ planned treatment on the chart.</td>
<td>Configuring Planned Treatment Appointment (on page 41)</td>
</tr>
<tr>
<td>Prompt the Receptionist to book future Recall appointments for patients whose current treatment is completed, and for whom no further treatment has been planned on the chart.</td>
<td>Configuring Recall appointments (on page 43)</td>
</tr>
<tr>
<td>Prompt the Receptionist to process patient payments.</td>
<td>Configuring Payment Processing (on page 44)</td>
</tr>
<tr>
<td>Prompt the Receptionist to ask for details if a patient’s email address is missing, or mobile phone number is missing from the records.</td>
<td>Configuring Contact Details (on page 46)</td>
</tr>
<tr>
<td>Prompt the Receptionist for custom reasons that are not by default included on the Departure Details screen (see &quot;Configuring the Departure List&quot; on page 39). For example:</td>
<td>Configuring Custom departure tasks (on page 47)</td>
</tr>
</tbody>
</table>

- To wish the patient Happy Birthday for birthdays in the following week.
- To issue a brochure on practice special offers for the next 6 months.
- To issue a list of services offered by the practice.
- To discuss discounts offered for patient referrals.
- To direct patients to the comprehensive practice website where they can view special offers and be further educated on the benefits of various dental services.
- To sign-up the patient for a newsletter.
- To request the patient complete an evaluation form on the practice’s customer service.
Accessing the Appointment Workflow Wizard

To access the Appointment Workflow Wizard

1. Select Configure > Practice Settings to display the Practice Settings window.
2. Under Appointment Books, select as follows:
   
   **Note:** First enable Multicolumn Appointment Book before enabling the Appointment Workflow.

3. Select the spanner icon to display the Appointment Workflow Wizard at the Departure Details screen:
Configuring the Departure List

What does this configuration achieve?

This creates a template for the possible tasks in the Departure List (see "Managing the Departure Task List" on page 23) that appears as a pane on the left side of the Main screen:

In the above example, the configuration has specified that the Receptionist will be prompted to process payments, and will also be required to offer departing patients a Brochure on the services offered by the practice (this is a custom option created by the practice).

To configure the Departure Details screen

1. Access the Appointment Workflow Wizard (see "Accessing the Appointment Workflow Wizard" on page 38) to display the first screen, the Departure Details:

2. Check the appropriate boxes on this screen. When you click Next >, the appropriate configuration screens will display.
<table>
<thead>
<tr>
<th>Book a Planned Treatment Appointment (see &quot;Configuring Planned Treatment Appointment&quot; on page 41)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prompt the Receptionist to schedule bookings based on the Providers’ planned treatment on the chart.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Book a Recall Appointment for Treatment Complete Patients (see &quot;Configuring Recall Appointments&quot; on page 43)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prompt the Receptionist to book future appointments for patients whose current treatment is completed, and for whom no further treatment has been planned on the chart.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Process a Payment (see &quot;Configuring Payment Processing&quot; on page 44)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prompt the Receptionist to process patient payments. This by default includes all invoiced amounts, and can be configured to include completed, un-invoiced treatments, and planned treatments.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Prompt for Email Address or Mobile Phone, if Missing (see &quot;Configuring Contact Details&quot; on page 46)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prompt the Receptionist to ask for details if a patient’s email address is missing, or mobile phone number is missing from the records.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Custom options (see &quot;Configuring Custom departure tasks&quot; on page 47)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prompt the Receptionist for custom reasons that are not by default included on the Departure Details screen. This could be any task that is relevant to the practice.</td>
</tr>
</tbody>
</table>
Configuring Planned Treatment Appointment

What does this configuration achieve?

Receptionists will be prompted in the Departure List (see "Using the Departure Task List" on page 25) to schedule Planned Treatment Appointments from the patient departure, following guidelines specified by Providers.

Receptionists have multiple tools to facilitate the booking. For example, they can book these appointments by means of drag and drop or by editing:

To configure Planned Treatment Appointment departure tasks

1. **Access the Appointment Workflow Wizard** (see "Accessing the Appointment Workflow Wizard" on page 38), and check **Book a Planned Treatment Appointment**.

2. **Book a Planned Treatment Appointment**: Check / select this if you want patients with planned treatment appointments to book those appointments before leaving the Practice.

3. Sending to the Follow Up Tab is an option to send unbooked appointments to a postponement area, for handling later (for example, if receptionists are expected to be exceptionally busy):
o Select **Prompt** to have the system ask whether to send the unbooked appointment to the Follow Up tab.

o Select **Always** to send unbooked appointments to the Follow Up tab anyway.

o Select **Never** if you do not want to configure this option.

4. When Providers specify appointment requirements, they may include a booking interval - the *minimum* time required before the next appointment. These intervals carry through to the display on the Departure List, where the EXACT software calculates and displays the first available time slot in the appointment book. EXACT uses the **default** booking interval unless a Provider manually specifies otherwise. The default options are from 1-7 days, and then 2 weeks, 3 weeks, or 4 weeks.

For example, today the patient has had a crown preparation visit, and Lab work is now required. There is no point in re-booking the patient for the crown fitting before the Lab work has been completed, so a minimum interval must be specified, anticipating the Lab work duration.

5. No further configuration is required for Planned Treatment Appointments. Click **Next** or **Finish**.
Configuring Recall Appointments

Recall appointments are for patients who have no further planned treatments. This configuration is only for practices which aim to book recalls immediately after treatment, before the patient leaves the premises.

What does this configuration achieve?

Patients who have no planned future treatments can be **scheduled for Recalls** (see "Scheduling Recall appointments from Departure" on page 33) by the Receptionist.

Recall services (EX for Exam) and the recall date **07/07/2012**

The first available slot for this recall is identified. Click to go to this slot in the Appointment Book.

To configure Treatment Completed departure tasks

1. **Access the Appointment Workflow Wizard** (see "Accessing the Appointment Workflow Wizard" on page 38), and check **Book a Recall Appointment for treatment Complete patients**:

2. No other configuration is necessary. Click **Next >**.
Configuring Payment Processing

Use this configuration to prompt the Receptionist to ask the patient for payment on invoiced work or any other outstanding balance, before the patient exits the premises.

What does this configuration achieve?

The result of this configuration is that

- The Patient Payments configuration screen (Configure > Patient Payments) is updated:

![Patient Payments Configuration Screen](image)

- The Receptionist will be able to Process Payments from Departure (see "Processing Payments from Departure" on page 34): when processing a patient’s departure, the Receptionist will see a Payments screen that automatically includes the configured payments.

To configure for payment processing in the Appointment Workflow

1. Access the Appointment Workflow Wizard (see "Accessing the Appointment Workflow Wizard" on page 38), and check the process a Payment checkbox:
2. When you click Next, you will be prompted for further details:

By default, the receptionist will be prompted to process all treatments for which the patient has already been invoiced.

Select ✔ Completed Treatment to also prompt for payment processing of completed treatments that have not yet been invoiced.

Select ✔ Planned Treatment to also prompt for payment processing of planned treatments that have not yet been invoiced.

3. Select Next or Finish.
Configuring Contact Details

What does this configuration achieve?

When processing patient departures, the Receptionist will be prompted to update patient contact details (see “Recording Patient Details from Departure” on page 35) from an option in the Departure List:

The above example shows a prompt for a patient with an unrecorded Email and an unrecorded Mobile phone. Other possibilities are: Collect Email and Collect Mobile.

**Note:** This task relates to blank Email and/or Mobile Phone fields in the patient record. If either of these change for a patient, EXACT has no way of knowing, and will not create a task in the Departures Task List. To cover this possibility, you could configure a Custom task (see “Configuring Custom departure tasks” on page 47) to "Ask patient if any contact details have changed."

To configure a Departure List prompt for Email Address or Mobile number

Access the Appointment Workflow Wizard (see "Accessing the Appointment Workflow Wizard" on page 38), select the Email and Phone options, and select Next / Finish.
Configuring Custom departure tasks

What does this configuration achieve?

When processing patient departures, the Receptionist will be prompted to complete customised tasks (see "Processing Custom Tasks from Departure" on page 36) in the Departure List:

For example, here the receptionist is prompted to issue a brochure:

To configure Custom Options in the Departure List:

1. Access the Appointment Workflow Wizard (see "Accessing the Appointment Workflow Wizard" on page 38), and in the Departure Details screen, select Custom Options:

2. Click Next >
3. Depending on your configuration selections, you may need to configure other screens first, but you will come to the Custom Options screen, from which you need to select the button:

![Custom Options screen](image)

4. When the Add Custom Option screen displays, complete the fields to create your custom task for the Receptionist to process. For example:

![Add Custom Option screen](image)

Type a **Description** (up to 25 characters) and free text **Notes**, in a way that will be understandable when later displaying on the Departure List.

5. Select **Patients** by Query Template. Select a template using the or buttons (the latter will allow you to **create a new query** (see “**Populate a field by means of Query Templates**” on page 49), if required).

6. Select **OK**.

The new custom task displays in the Custom Options window, from where you can use the buttons to **Edit** selected, **Add** another task, or **Delete** the selected:

![Custom Options window](image)

7. Click **Finish**. This task will now appear in the Departure List.
Populate a field by means of Query Templates

At various points in EXACT you have the option to populate a field with multiple values by means of Query Templates.

A Query template is like a pre-configured macro for speeding your means of selection.

For example, select Patients for custom task options in the Departure List:

To select values by scrolling for Query Templates

1. Click in the blank field to activate the selection buttons .
   You now have the option to select by scrolling up and down the list of Query templates or by creating a new Query Template.

2. To scroll for a Query template: Keep clicking the Up and Down arrows until you see the template that you require, and then click OK:

To create a New Query Template by Importing .CSV file:

(CSV this is a comma delimited file such as a Microsoft Excel file).

1. Click the selection button to open the View Query Templates window.
2. Click Import, then browse for and Open the file, to have it list in the Description box window:

3. Click to select it, and then click OK. You will be prompted to type a Description and a Notes before selecting
this template into the original field

To create a New Query template:

(See also: To Create a New Query)

1. Click the selection button , and then from the View Query Templates window, click the button:

2. Type a Description for this Query template. We'll use a "Birthday" example for a Birthday Reminder template.

3. Select to open a Select Condition list. Select the condition (Birthday in our example) and press OK:

4. In the resulting Edit patient Selection window, configure the query date range, in this example to find Patients with a birthday in the coming week.

5. Select OK to return to the Add Query template window.

Note: You can further customise this selection using the controls highlighted below. See To Create a New Query for more details.
6. Click **OK > OK** to return to the **Custom Options** screen, and then click **Finish**.
Index

A
Accessing the Appointment Workflow Wizard • 6, 8, 12, 33, 37, 38, 39, 41, 43, 44, 46, 47
Adding Departure List appointments to Short Notice List (v11.3) • 25, 30

B
APPONITMENT WORKFLOW / DEPARTURE TASK LIST • 6

Benefits of Appointment Workflow • 6, 8, 9

C
Clinical workflow (IMPORTANT to understand!) • 6, 13, 14, 18, 22
Configuring Appointment Workflow • 6, 23, 37
Configuring Contact Details • 6, 23, 37, 40, 46
Configuring Custom departure tasks • 6, 10, 23, 37, 40, 46, 47
Configuring Payment Processing • 6, 23, 37, 40, 44
Configuring Planned Treatment Appointment • 6, 22, 37, 40, 41
Configuring Recall Appointments • 6, 23, 37, 40, 43
Configuring the Departure List • 6, 28, 37, 39

F
Features of Appointment Workflow • 6, 8, 10

G
Generating the Appointment Workflow Compliance Report • 10, 11, 13, 15

I
Interpreting the Appointment Workflow Compliance Report • 15, 16

M
Managing the Departure Task List • 6, 12, 14, 18, 20, 21, 22, 23, 39
Marking an appointment as Completed • 6, 24, 25, 27, 34
Moving the patient to Departure • 6, 14, 18, 19, 20
Moving the patient to the Chair • 6, 14, 18

O
Overview of Appointment Workflow • 8

P
Populate a field by means of Query Templates • 48, 49
Processing Custom Tasks from Departure • 6, 23, 24, 25, 36, 47
Processing Payments from Departure • 6, 23, 24, 25, 34, 44
Provider tasks in the Patient Retention workflow • 6, 13, 14, 18
Purpose of Appointment Workflow • 6, 8

R
Receptionist tasks in the Appointment Workflow • 6, 13, 14, 20, 22
Recording Patient Details from Departure • 6, 23, 24, 25, 35, 46
Requirements for Appointment Workflow • 6, 8, 12

S
Scheduling Planned Appointments from Departure • 6, 22, 24, 25, 31, 34
Scheduling Recall appointments from Departure • 6, 23, 24, 25, 33, 43
Specifying Recall Appointments for Departure • 14, 18, 20, 21
Specifying Treatment Appointments for Departure • 14, 18, 19, 20

T
The Appointment Workflow Compliance Report • 6, 15, 22, 23, 27, 31, 33

U
Using Appointment Workflow • 13
Using the Departure Task List • 6, 7, 24, 25, 41

TYPOGRAPHICAL CONVENTIONS • 5