User's Guide

Clinipad
Electronic froms, signatures and surveys
EXACT version 11

Update in EXACT version 12:
Addendum 1: How to release a locked Clinipad
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The Clinipad module enables patients and/or staff to complete and sign forms digitally by means of electronic tablet devices.

Signed documents are stored electronically and can be verified as original and un-altered, with genuine signatures that are accepted as legally binding.

This technology modernises and speeds data capture, saves on printing and paper storage costs, and enhances patient perceptions of the dental practice.

**Overview**

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Videos, PDFs

Portal video: How Clinipad works
http://portal.softwareofexcellence.com/video/how-clinipad-works

Portal video: Clinipad
http://portal.softwareofexcellence.com/video/clinipad-exact-v113

Portal video: Clinipad configuration screen and tab layout

Portal video: Clinipad signed Terms and Conditions
http://portal.softwareofexcellence.com/video/clinipad-signed-terms-and-conditions


Training Competencies Checklist

Patient guide to using Clinipad
Overview of Clinipad

Purpose of Clinipad

Clinipad enables a dental practice to use an electronic tablet to collect patient details and signatures for predetermined documents in EXACT, and then store those documents in such a way that the document can be verified as original and un-altered, and the signature can be verified as genuine.

It is suitable for all practices.

It is used primarily in Reception, but it is also possible to complete forms in the Surgery.

Applicable documents:

- Update, store and print Medical History details with electronic signature
- Update, store and print Patient Details
- Create Estimates for electronic signing and generation as PDF forms
- (UK) Complete, store and print the NHS FP17PR (Wales FP17PRW) Form with electronic signature (this has been approved by the health board)
- (England) Complete the NHS Friends and Family Test
- Sign Terms and Conditions.

Technology:

The technological base for this electronic signatures functionality is the digital signature security supported by the Adobe Acrobat (PDF) document format, which provides a way to authenticate digital data based on public key cryptography.

Functionality:

The patient (or practice) is able to

- Complete appropriate details on forms electronically.
- Enter exemption/remission entitlement, ethnic group and patient representative's name and relationship to the patient electronically.
- Enter medical details (history, medication etc) electronically.

The practice is able to

- View, store and print electronically-signed medical forms.
- View all details on the current electronically-signed form/s.
- Store forms with a date and time stamp, a link to the appropriate COT and a full audit trail.
- View and confirm on screen that a form has been signed electronically.
- Print forms that have been signed electronically, with the digital signature shown.
Features of Clinipad

Patient signature and Dentist counter-signature options

From v11.10 there is a Dentist option to require that the Medical History be reviewed in the surgery, and if so, whether the Dentist’s counter-signature is required on the form.

This is a setting per Dentist:

![Medical History Configuration](image)

It applies to both printed forms and Clinipad. It may change the Clinipad workflow in the practice, depending which options are configured per Dentist.

In addition, user-specific Medical settings have been moved from the User Settings window to the Medical History Configuration window.

See Medical History Configuration

Mark Medical records as Reviewed, even if they haven’t been edited

Providers can record that they have *Reviewed* a patient’s medical record, *whether or not they changed that record*.

Nurses without edit permissions can record that they have Reviewed read-only medical records.
Option to mark Medical History items as Yes / No / Don’t Know

From v11.10 this Advanced form provides three options for each parameter: Yes, No and Neither (Don’t know)

Create, update, store and print multiple patient forms

When a Receptionist marks a patient as Arrived for an appointment, EXACT checks whether the patient needs to update the following forms on Clinipad:

- Patient Details
- Medical History
- Oral Health Survey
- Terms and Conditions. See Overview of Clinipad Terms and Conditions.
- NHS FP17PR (Wales FP17PRW) form, as approved by NHS Dental Services.

The Clinician can also request the patient to review and digitally sign Estimates on the Clinipad. See Overview of Clinipad Signed Estimates (on page 39).

Configurable alerts

Alerts can be configured for updating medical details and for updating patient details based on number of months overdue.

Security
• Electronic signatures are stored securely in the system in a way that they cannot be edited, re-used or deleted.
• No data is stored on the iPad.
• Any changes to patient details have to be approved by staff.

Verification

Any document can be verified as having been signed by a particular person on a particular date, without the electronic version having since been altered.

Clinipad can be used in multiple locations

Patients can update details either in Reception or in the Clinic.

Adobe Acrobat (PDF) format

The electronic signatures functionality is based on the digital signature security supported by the Adobe Acrobat (PDF) document format. This provides a way to authenticate digital data based on public key cryptography.

Responsible person must sign on behalf of minors or adults who are unable to sign

By default minors (under 16) cannot sign independently, but this is based on a checkbox that can be overridden. If an adult patient is unable to sign their own forms, this can be recorded against their patient file, and a responsible person will have to sign on their behalf.

The PRINT button is replaced with a SIGN button

Documents in EXACT that are normally printable by means of a Print button become electronically signable by means of a Sign button when the Clinipad module has been registered and an approved local signing device is configured on the system.

Signed documents can optionally also be printed

By default, signing replaces printing in EXACT. However, EXACT can optionally be configured to allow printing of a form after it is signed, which will cause EXACT to offer a Print button to the user at the point of saving the electronic signature.

NHS compliant (UK)

Electronic signatures meet NHS Dental Services requirements.
Benefits of Clinipad

A step towards paper-free administration

For large practices especially, physical forms administration is expensive in both space usage and personnel resources. The Clinipad functionality reduces these legacy expenses by removing the need to scan forms, store them digitally or store them physically:

- No need for printed medical history forms or printed FP17 forms.
- No need to search through cupboards, boxes or filing cabinets.
- Because searching for forms is digital, it is much faster than physical paper.

Simpler, faster workflow

This module makes it possible to implement a much simpler, faster workflow:

- No printing a form and asking a person to complete and sign it with a pen
- No scanning of forms back into the system.
- No typing / data capture from forms back into the system.
- Eliminated typing errors during the data capture.

See also: Clinipad workflow (on page 16).

Professionalism

Dental practices using Clinipad appear modern and professional.

(UK) NHS Compliance

Clinipad meets the requirements of NHS Dental Services.

See also: Using Clinipad NHS Friends and Family Test

Clinipad integrates seamlessly into the EXACT Appointment Workflow:

There are multiple points within the standard Appointment Workflow at which a patient may be requested to update and/or digitally sign:

- On arrival at Reception the Arrivals screen may prompt for Patient Details, Medical History, FP17 form or Oral Health Survey.
- In the Clinic the Clinician can request a Oral Health Survey or generate an Estimate.
- On exit from Reception the Receptionist can request Patient Details or Medical History

See also: Clinipad workflow (on page 16)

Integrated Arrivals screen

A single screen pops up on patient arrival and provides multiple Clinipad functions.

See Using Clinipad with Patient arrival (on page 18).

Integration into EXACT

The Clinipad module is fully integrated into EXACT software:

- Accepted patient demographics are integrated into the patients details tab.
- Accepted medical history forms are stored against the patient file.
Completed forms can be retrieved in EXACT, and they link to their associated courses of treatment.

Estimate records are digitally integrated into EXACT for listing in the Estimates list, rapid location and display, transmission by Email, and potential reporting.

Clinipad works asynchronously with EXACT: When EXACT sends one or more forms to Clinipad for processing the EXACT workstation is freed to do other work while the patient reads, completes and signs the forms. When ready the forms can be retrieved on request by the original or a different workstation.

Device pooling increases workflow flexibility: Clinipad can manage a pool of iPads. When combined with the asynchronous functionality this offers flexibility in practice workflows.

**Accurate signature verification**

Verification is biometric based, so Clinipad uses pen pressure and speed to add further accuracy to signature verification.

**Fast access to archived forms**

Large practices that accumulate large volumes of archived physical documents now benefit from rapid electronic retrieval of forms.

**Fast, economical transmission of forms**

Electronic forms can be transmitted to others quickly and economically via media such as email.

**Automated verification of form completion**

Unlike their paper equivalents, electronic forms can incorporate measures for verification of completion. For example, patients are constrained from signing / completing the form until they have ticked all the boxes and entered data in all the fields. For compliance purposes this is especially useful.

**The verification guards against misunderstandings and unethical litigation**

Because documents can be verified, all parties have a means of clearing up misunderstandings, and it is difficult for people to conduct unethical legal action against a practice or a practitioner.

**Simpler verification promotes a culture of regulation**

Because it is relatively simple to create verifiable documents, it is easier for practices to develop and benefit from a culture of document-signing / form verification.

**Requirements for Clinipad**

**Hardware:**

- Internet connection to download the App.
- At least one Clinipad device per area in which forms will be digitally signed, or a means of easily sharing the devices between areas.
- Possible Clinipad devices:
  - **iPad**: version 2, 3, 4 or iPad Air (5) running at least iOS 6.
  - **Android**: Samsung Galaxy Note Tab 4 10.1, Samsung Galaxy Tab E, ASUS Memopad 10, ASUS Transformer TF103CX
- Wi-Fi set up in the dental practice. and each Clinipad device must be connected to the Wi-Fi. Routers have different interfaces so the instructions will vary, but the recommendations are:
- Use a WPA2 secured password
- Hide your SSID
- Allow connection from devices with known MAC address only (if practical)

- Each CliniPad device must be able to communicate back and forth with the server.

**EXACT:**

- The CliniPad module is available from EXACT version 11.3 SP1 or later
- The CliniPad module must be registered in EXACT.
- The Patient Medical History configuration must be set to "Fixed" as this is the only configuration recognised by CliniPad:

```
<table>
<thead>
<tr>
<th>Medical History Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Medical History</td>
</tr>
<tr>
<td>Fixed Medical History</td>
</tr>
</tbody>
</table>
```

- Practitioners who use CliniPad must have access to the CliniPad software (see *Adding CliniPad to the Workspace and Activity bars* on page 68)).
- For **Clinipad Signed Estimates** (on page 39),
  - EXACT v11.3 SP7 or later.
  - A compatible Estimate template (where the signature box has been encoded using a special PRX command) - EXACT ships with default templates that can be customised.
- For CliniPad Oral Health Surveys:
  - EXACT v11.3 SP7 or later.
  - Appointment arrivals workflow needs to be enabled and configured.
  - Users who will be Saving and Completing Oral Health Surveys after discussion with the patient must have the appropriate permission set in the Security settings. For example, the role of DENTIST:

```
<table>
<thead>
<tr>
<th>Role</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>DENTIST</td>
<td>View Oral Health Surveys, Complete/Save Oral Health Surveys, Configure Oral Health Surveys, Create Oral Health Surveys</td>
</tr>
</tbody>
</table>
```

Adobe Reader:

- PDF Viewer such as the Adobe Reader on each computer from which users will view documents.
- Adobe Reader must be set as the default PDF viewer (this is required for verifying signed documents)

See also: Setting up Adobe Reader to view signed CliniPad forms (on page 67)

Procedures:

- By default, a responsible adult must sign on behalf of persons under 16 years of age. This default requirement can be overridden for minors who are deemed competent to sign themselves.
Using Clinipad

This section includes the procedures to use Electronic Signatures in the EXACT software.

Clinipad for Wales

From v11.8 Clinipad is available for Wales, and differs from the remainder of the UK only in the use of the NHS FP17PRW form.

**NOTE:** Clinipad offers only English language digital forms for Wales, including the FP17PRW fixed form. The practice needs to revert to paper if a patient requests a Welsh-language form. Patients can enter in their exemption status details and sign the form. The exemption status will be passed into EXACT and used for the NHS course started that day. The signed form will be kept on record and can be printed if an audit ever requires it to be produced.

NHS Payor Type for Wales:

![Image of Payor Type Table]

FP17PRW form:

![Image of FP17PRW Form]

Welsh version uses the FP17PRW form
Clinipad workflow

There are multiple points at which a patient may be requested to use Clinipad:

- On arrival at Reception, when the Receptionist requests a Medical History form update, a patient details update, an Oral Health Survey, or a Terms and Conditions signature.
- When the clinician requests a Medical History form update, generates a Course Of Treatment (COT) with NHS FP17, creates an Estimate or creates an Oral Health Survey.
- On exit from Reception, when the Receptionist may request a Medical History form update, a patient details update, or a Terms and Conditions signature.

Arrival in Reception:

1. Register patient as **Arrived** in EXACT by clicking the small box in the Appointment screen. An **Arrival** window indicates what needs to be done for that patient.

2. In the arrival window, specify which Clinipad device, then click **Arrive & Send to Clinipad button** (if no devices are free, check patient in manually using Arrival Workflow hyperlinks).

3. On the Clinipad, click **Change Patient** to refresh and bring up forms.


Arriving Patient:

5. If required, complete forms, sign, and hand Clinipad back to Receptionist.

Receptionist:

6. In the EXACT Clinipad tab click **Return** to import the data.

7. If a form is missing it will be indicated in the Clinipad Tab.

8. Preview the pending data and forms and accept them into the patient file.

9. If patient details were updated, click the **Updated** hyperlink to bring up a comparison window, to check on the changed data. Click **OK** in this window to check in the data and clear the line.
In the Clinic:

 Clinician in the Clinic - possible actions:

9. Register patient as Moved to Chair in EXACT.
10. Issue Clinipad to patient and aid/review/discuss accurate completion of the Medical History Form.
11. Counter-sign the patient signature in the Medical History Form.
12. Create an Oral Health Survey if this has not already been completed. Review Oral Health Survey results and if possible create an Oral Health Treatment Plan.
13. Create an Estimate and send it to the Clinipad / specify the Clinipad device for signature.
14. Create a COT and send FP17 to Clinipad / specify the Clinipad device for signature.
15. Mark Patient as complete in EXACT and send patient to departure at Reception.

 Patient in the Clinic - possible actions:

17. Complete the Medical History Form and sign it.
19. Sign Clinician’s Estimate.
20. Sign FP17

Departure from Reception:

 Receptionist at Departure - possible actions:

22. Repeat the Patient signature process with any outstanding medical or other forms.
23. Complete the Appointment Workflow Departure Task List, including creating applicable bookings.
24. (NHS only) If prompted for Friends and Family Test, issue the Clinipad to the patient with instructions to complete the Test.

 Departing Patient - possible actions:

25. Complete outstanding forms.
26. Complete the Friends and Family Test and return the Clinipad to the Receptionist.
Launching Clinipad in EXACT

Clinipad is easiest launched off a window shortcut on the workspace bar or a Clinipad tab in the appointment activity bar beneath the appointment book.

Both of these options require configuration - see *Adding Clinipad to the Workspace and Activity bars* (on page 68)

To launch Clinipad from a shortcut on the Workspace Bar

To launch the Clinipad Tab on the appointment activity bar

Using Clinipad with Patient arrival

To register the patient as "Arrived" without following the Arrival Checklist

1. As a patient arrives in the practice, click to check them in on the appointment book screen as normal.
2. An Arrival screen will appear, allowing you to select which patient information you want updated.
3. Click the Arrive button at bottom centre to register the patient as arrived in the normal manner (see also the Arrive button in the screenshot below)
To use Clinipad with Patient arrival (summary of procedure)

1. Check (tick) to specify which forms to send to Clinipad.
2. Select a Clinipad hardware device to issue to the patient.
3. Select **Arrive and Send to Clinipad** so that EXACT can prepare the Clinipad.
4. Issue the patient with the Clinipad and offer brief instructions.
5. When the patient returns it, click the **Return button**.
6. If you need the patient to use it again, click the **Issue button** and hand the Clinipad back.

To use Clinipad with Patient arrival (detailed procedure)

1. As a patient arrives in the practice, click to check them in on the appointment book screen as normal.
2. An Arrival screen will appear, allowing you to select which patient information you want updated.
   
The ordering of icons at top left of the screen matches the vertical ordering of forms on the screen:

   Matches the vertical ordering of forms on the Arrivals screen, from top (left) to bottom (right)

   Note the **two** Arrive buttons at the bottom of this screen:

   - Click the **Arrive and Send to Clinipad** button to cause EXACT to register the patient as arrived and send
the checked forms to the Clinipad that is selected on the dropdown menu.

- Click the **Arrive button** to simply register the patient as arrived in the normal way.

**EXACT** indicates with a ticked checkbox when a form needs to be updated by default. Users can optionally override the default requirement and either tick or un-tick the checkboxes.

**To update Patient Details manually, in the EXACT software**

Click the Patient Details hyperlink (Patient Details) to open the Patient Details screen, and from where you can complete the fields.

**NOTE:** Clicking the Medical History hyperlink will cause EXACT to print these forms, which you can then issue to patients to complete manually.

**To print out Medical History for the patient to complete**

(This makes it quick and easy to update details where you don’t want to use the Clinipad or when one isn’t available)

Click the Medical History hyperlink to open the print dialogue, print the form and issue to the patient.

**Form indications:**

An icon will appear in the top right corner for each form that the patient can potentially update.

Hover over an icon to see a tooltip description:

---

**Oral Health Survey examples:**

<table>
<thead>
<tr>
<th>Due</th>
<th>Not due</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Clinipad form" /></td>
<td><img src="image" alt="Printed form" /></td>
</tr>
<tr>
<td><img src="image" alt="Available on Clinipad" /></td>
<td><img src="image" alt="Not available on Clinipad" /></td>
</tr>
<tr>
<td><img src="image" alt="Requires update (Clinipad)" /></td>
<td><img src="image" alt="Requires update (manual)" /></td>
</tr>
</tbody>
</table>

**Reasons:**

- The patient has never completed this survey before.
- It has been more than the configured interval since the last survey.
- The Patient is under the minimum age - 18yrs default,
- The Patient has had a survey within the configured survey period - 2yrs default,
- The Patient has no dentist appointment today.

Forms that are *not* due, for example if the medical history was checked recently, will appear white (pale).

Forms that have the "eye" icon require updating and will also be ticked by default in the list.

Uncheck (de-select) these if you do not require them.

**Available Clinipads:**

If you have multiple Clinipad devices, all the available ones are listed in the Complete forms using...
3. (Manual option, without Clinipad) If you updated the forms manually and don’t want to use Clinipad, or if a Clinipad is not available, simply press the **Arrive button**.

4. Uncheck any forms that you do not require the patient to edit.

5. On the device dropdown menu, select the device that you want the patient to use and press **Arrive and Send to Clinipad**.

6. ! Pick up the chosen Clinipad. Check its number at the bottom left on the screen:

7. Before handing it to the patient, on the main screen press **Change Patient** to refresh the screen with the newly arrived patient’s details and forms:

8. Hand the device to the patient and provide basic instructions.

The patient selects each form from the list and completes as required, using only a finger or a stylus. The forms are **fixed** so any items which don’t appear on them need to be typed into the free text boxes in each section by means of the screen keypad (this appears when you tap into a text box). For example:
Many forms can be signed by the patient directly onto the Clinipad device using their finger or a stylus. For example:

When the patient selects the **Send** button the signed form displays for patient review. If the patient is satisfied they tap the **Done** button:

The button on the Clinipad front screen then displays a check (tick):

9. The Clinipad device actions are tracked on the **Clinipad Tab** (see "Managing from the Clinipad tab" on page 25) (shown below) and the **Clinipad screen** (see "Managing from the Clinipad screen" on page 28).
You will be able to see the patient’s name, which Clinipad device they have, which forms they are required to complete and how long they have had the device.

**NOTE:** The **Issue button** is for re-issuing Clinipad to the patient (the initial issue is activated from the Arrival dialogue’s **Arrive and Send to Clinipad button**).

10. The patient completes the data capture and hands the Clinipad back.

11. Click the **Return button** against that patient name.

   This makes the device available for the next arriving patient, and displays the status of the patient’s efforts on the screen.

   You can see which forms were **Updated** by the patient and those that had **No Change**.

12. **For forms that were not updated or Not done:**

   You can **Issue again** if the patient missed them in error.

   Alternatively if you want to accept that there are no changes then you can click the **No Change** hyperlink and the patient will be removed from the Clinipad list.

13. **If there are changes:**

   You will see that the form has been **Updated**. Click this **Updated** hyperlink to view the changes that have been made in green text:

   Compare with the current details and either **approve** the change by selecting **OK**, or if you wish to reject any of the changes that the patient made you can select the **current value** of each item and then select **OK**.
The patient will then be removed from the Clinipad list, and changes immediately made to EXACT.

In the case of family appointments checked in using Clinipad, the patient simply has to press change patient on the Clinipad device and they will see the list of patient’s available within the family appointment.

**Family Appointment procedures**

The initial Arrival dialogue shows the entire Family

Click the + button to expand and see details:

Select one family member at a time on the Clinipad:
As each patient completes their form, they press Change Patient to move to the next patient.

One family member returns the Clinipad device for them all.

**Managing from the Clinipad tab**

This is the row of tabs below the Appointment Book:

- Cancells  |  Contact Lists  |  Arrivals  |  Short Notice List  |  Clinipad  |  Follow Up  |  Recalls  |  Departures

EXACT has to be configured to display the Clinipad. (see "Adding Clinipad to the Workspace and Activity bars" on page 68)

**To manage Clinipad operations from the Clinipad tab in the appointment book**

The Clinipad returns tab shows a list of patients (or families) who have been issued Clinipad in order to complete forms.

When they return the device, it allows the user to check-in and manage the changes that patients have made.

For each Clinipad device issued to a patient or family there will be one line that shows

- An expander for drilling in to more information
  - Drilling in will show a line of all the forms that the patient was asked to complete.
    - You can only expand one line at a time.
- In most situations it should not be necessary to drill into patient records to deal with forms going out or coming back.

- **To whom the Clinipad device was issued.**
  In the case of a family the head of family’s surname + the number of patients is shown
  - Click a patient name to open their patient file:
    - Miss Ceridwyn Nightstricker
  - Click a family expander to expand and show one line per family member:
    - The Zindlestone Family (3)
    - Click individual family members to access their patient files.
    - You can further expand family member lines to show the forms due from each family member.

- **The name of the Clinipad device that has been issued:**
  - iPad Mini
    - This device name also shows as an identifier on the bottom left of the Clinipad device home screen (iPads can all look the same).

- **For how long the patient / family has had the device:**
  - 2 Minutes, 26 Seconds
    - A timer counts up from zero while the device is in use. If the timer goes over twenty minutes it turns red to alert you that the patient may have completed forms:
      - 2 Minutes, 25 Seconds
    - A Return button for when they hand the device back:
      - Return

When you click the Return button, EXACT will check to see if the patient has completed all of the required forms.

- If they have not, a Forms Incomplete dialogue will pop up to identify which forms are missing, and to give you the option of returning the Clinipad device to the patient:

If the patient has completed all the forms, or if you still want to return the device (you are not going to make the patient complete the missing forms), EXACT returns the device to the pool, and the onscreen view changes:

With the data returned each line now also shows

- Whose data has been returned
In the case of a family the head of family’s surname + the number of patients is shown:

- Click a patient name to open their patient file:
  - Miss Ceridwyn Nightstricker

- Click a family expander to expand and show one line per family member.
  - Click individual patients to access the patient file.
  - You can further expand the line to show the forms due from each family member.
- Each form shows whether the data has been updated:
  - No Change, Not Done

- Depending on your security settings you can click the forms to see the data returned.

- A Check and Dismiss button to check-in the data:

  (Note that this button is not shown for a family, it is only shown for individual family members).

- An Issue button, to use if the patient needs to have the Clinipad device given back to them:
  - Click the Issue button to bring up a dialogue allowing you to send the form.

Click the Check and Dismiss button to see if any data needs to be triaged.

- Changes to patient information, and patient’s doctor need to be reviewed before they are written to the database.

- Other forms such as medical history or Oral Health Survey do not need to be reviewed.

If there are changes that need to be reviewed a dialogue will pop up for each form showing the changes and asking for review.

Once the data has been accepted or rejected, or if there were no changes to triage, the patient is removed from the list.

To manage Clinipad Form statuses

These are the possible statuses shown in the Clinipad tab and screen:

Clinipad Form statuses for Patient Details:

- **No change**
  - Click this to clear the line.

- **Updated**
  - Click to bring up a comparison window, which allows you to check the changed data.
  - When you click OK, EXACT checks in the data and clears the line.

Clinipad Form statuses for Medical History:
Clinipad Form statuses for Oral Health Survey:

**Not done**
Patient did not fill in any details.

**Signed**
Patient updated medical history details. Click to view the Medical History form in PDF format with the patient’s details and signature.

**Clinipad Form statuses for Oral Health Survey:**

- **Not done**: Patient did not fill in any details.
- **Blank**: Patient filled in the Oral Health Survey but there were no details requiring consultation.
- **Needs Consult**: Patient filled in the Oral Health Survey and there were details requiring consultation. Click to display this Oral Health Survey.

In this status the Oral Health Survey will also display to the Clinician when moving a patient to the chair.

The Clinician can process it from the Chart tab > Oral Health Survey tab, and Notes can be saved to the Oral Health Survey up until it is completed (once completed it becomes Read Only). See also: Using Clinipad in the Clinic (on page 30)

**Managing from the Clinipad screen**

This is an optional feature on the main screen.

EXACT needs to be configured to display the Clinipad icon (see "Adding Clinipad to the Workspace and Activity bars" on page 68):

![Clinipad Icon on EXACT Screen]

**TIP:** Clinicians can use this screen to monitor Clinipads, rather than opening the appointment book and accessing the Clinipad tab.

This screen has the same functionality as the Clinipad tab used by Receptionists.

See Managing from the Clinipad tab (on page 25) for procedures.
Using Clinipad with Oral Health Surveys

An Oral Health Survey is a simple, non-invasive way to initiate conversations with patients about potential cosmetic work while they are in the dental practice.

Patients independently complete either a printed form or an electronic form displayed in Clinipad without feeling pressured or judged by practitioners. In this form they indicate their oral issues of concern.

Their Dentist can then talk through these concerns, outline the kinds of treatment that could resolve their issues, and potentially create a treatment plan within the same appointment.

These Oral Health Survey conversations often expose underlying untapped demand for cosmetic dentistry, which can be very profitable for the practice and rewarding for patients who are left feeling great about their oral health and the proactive professional service that they have received.

See separate Oral Health Surveys information.

Having patients sign Clinipad Terms and Conditions

To issue the Clinipad for Terms and Conditions

As with the other forms, in the Arrivals screen EXACT indicates whether the terms and condition need to be signed and whether this will be done via Clinipad.

EXACT makes this decision based on the configuration, and shows this information as both icon at top right, and text on the Arrivals page:

Optionally override the decision by means of the checkbox (either requesting or not requesting that the terms and conditions be signed).

For further procedures see:
Using Clinipad with Patient arrival (on page 18)

Managing Clinipads from the Clinipad tab (see "Managing from the Clinipad tab" on page 25)

Using Clinipad in the Clinic

Typical tasks:

- Marking medical records as Reviewed
- Configuring EXACT to open the Medical History when you "move the patient to the chair"
- Configuring the Medical History Form per Provider
- Signing an Estimate in the Clinic
  See also this general topic: Clinipad Signed Estimates (on page 39)
- Viewing signed Medical Histories
  See Viewing signed Medical Histories in EXACT (on page 37)
- Completing an Oral Health Survey in the Clinic
- Creating a new Oral Health Survey from the Clinic
  (see also general topic: Oral Health Surveys)

To have a patient complete the NHS FP17PR (for Wales the FP17PRW) form in the Clinic

A Clinician can issue the patient with Clinipad in order to complete their NHS forms.

Click the Send FP17 to Clinipad button and you also then have the opportunity to check the box to include the Medical History for update on the Clinipad:

SEE ALSO: Dentists viewing FP17 Forms in EXACT (on page 31)
To have a patient complete the Medical History form in the Clinic

In the Patient File Medical Tab, select the Update Medical History using Clinipad button and you also then have the opportunity to check the box to include the FP17 Form for update on the Clinipad:

Dentists viewing FP17 Forms in EXACT

To view FP17PR (Wales FP17PRW) Forms in EXACT

Electronic FP17 forms can be viewed from the COT Exemptions window, the NHS FP17 window on TC, and the COT view or FP17 button once the course is TCed.

A Dentist opening a new COT sees either

- A screen with the option to Send FP17 to Clinipad to complete (see Using Clinipad in the Clinic (on page 30)):

- or -

- If the Form has already been completed, the option to View Signed FP17:
To view old FP17 forms

1. From a COT, click the TC button.
2. In the NHS FP17 screen, select the FP17 tab, and then either click one of the available buttons or double-click an image to view it:

Marking Medical Records as Reviewed in the Clinic

From v11.10 EXACT includes a means of recording that Medical History records have been Reviewed.

Providers can record that they have Reviewed a patient’s medical record, whether or not they changed that record.

Nurses without edit permissions can record that they have Reviewed read-only medical records.

Example: a patient’s medical record was created 12 months ago.
At today’s appointment the Nurse orally reviews the medical record with the patient.
The nurse selects a Mark as Reviewed button to record that the record still applies and is unchanged.

Mark as Reviewed:

Each time a Provider or a nurse opens an existing medical history form on screen, they will see an option to mark the medical history as Reviewed:
Audit record of the Review:

Practitioners can see the audit record of any marked Review when they check (tick) the Show Audit checkbox in the Medical tab:

Circumstances where Mark as Reviewed applies:

- From the medical history tooltip.
- From a read-only view of a patient's Medical History Form.
- From creation of a new patient Medical History Form.
- From update of a patient's Medical History Form.
- From Clinipad Medical History Forms.

To record the Medical Record as Reviewed from the tooltip
1. Hover your mouse cursor over the medical alert icon
2. Check the patient's medical details against those displayed in the tooltip.
3. Click the Mark as Reviewed button:

If your Medical History List has Show Audit checked (ticked) you will see a record of your review in the List.

To record the Medical History Form as Reviewed, without updating
1. Check the patient’s medical details.
2. Open the Medical History Form:
The Medical History Form will open in read-only mode.

3. **Click the Mark as Reviewed button:**
**To create, save and mark the Medical History Form as Reviewed**

This is optional for Providers.

1. Open the form, review the medical details with the patient and check all appropriate checkboxes. You’ll see an additional checkbox at the bottom of the form - **Reviewed by [PROVIDER]**:

   ![Medical History Form](image)

   - **Heart**
     - Rheumatic Fever
     - High Blood Pressure
     - Heart Surgery
     - Pacemaker fitted
   - **Chest**
     - Heart Murmur
     - Angina
     - Thrombus
   - **Blood**
     - Abnormal Blood Test
     - Sickle Cell
     - Haemophilia
   - **Other**
     - Serious Childhood Illness
     - Epilepsy
     - Diabetes
     - Cancer
   - **Allergies**
     - Penicillin
     - Hay Fever
     - Anti Tetanus Serum
     - Eczema
   - **Warnings**
     - No Local Anaesthetic
     - Warning Card
     - Anti Biotic Cover
     - Artificial Joint

2. To save without a Review record, simply click the **Save** button.

3. To both Save and record the Form as Reviewed,
   a. Check the checkbox.
      You will see the Save button change to a **Save as reviewed** button.
   b. Click the **Save as reviewed** button

![Save as reviewed button](image)

**Viewing signed Medical Histories in EXACT**

*From EXACT v11.10 Providers can opt to mark Medical Histories as Reviewed.*

**To view a patient’s signed medical history in EXACT**

1. Open the Patient File.
2. Select the **Medical** tab.
3. Look at the **User** field alongside Med History, as identified below.
   A Clinipad label in this User field indicates that the record was created electronically.
4. Double-click the Medical History line to open the Medical History Form for that patient, and then click the button at bottom left to view the signed document:

5. Review the signed form.

6. Select either Mark as Reviewed (see Marking medical records as Reviewed) or Close.

If you mark the record as reviewed an item will be added to the Medical List audit trail, testifying that you have reviewed the Medical History.

Practitioners can see the audit record of any marked Review when they check (tick) the Show Audit checkbox in the Medical tab:
Clinipad Signed Estimates

Dentists can use Clinipad to digitally display Estimates to patients and obtain the patients' digital signatures on the Estimates form. The Estimate is then stored as a read-only PDF file that can be opened for viewing, printing or Emailing. This technology helps to free the practice from paper and printing, it integrates seamlessly into EXACT, and it impresses patients.

Clinipad Signed Estimates are available from EXACT v11.3 SP7 onwards.

Overview of Clinipad Signed Estimates

Purpose

Clinipad users now have the option of asking the patient to sign a digital copy of their Estimates. Instead of printing an Estimate, you can send the Estimate to Clinipad where the patient reviews the digital version, signs on the screen and then returns the Estimate to EXACT where a copy can be emailed or printed for the patient to take away, and a digital copy kept for your records.

Benefits

- Practices can optionally become paper free for Estimates, with benefits in lower printing costs and no need for paper filing systems.
- Patients perceive the technology as progressive.
- Estimate records are digitally integrated into EXACT for listing in the Estimates list, rapid location and display, transmission by Email, and potential reporting.

Features

- Default EXACT Estimate templates ship with signable areas

Resources

• The Support Team can customise any Estimate template to include a signable area.
• EXACT supports multiple types of Estimate.
• Digital storage of patient Estimates.
• Digitally signed Estimates can be guaranteed not to have been altered.
• Indication within EXACT of which Estimates are signed.
• Ability to reproduce the signed Estimate at any time.
• Estimates can optionally be Emailed to patients or physically printed for them to take away.
• Patients sign the Estimate (on the Clinipad) in the presence of the Dentist.
• The signed Estimate is available for review from the Estimates list.
• For security, signed Estimates cannot be deleted.
• The provider can continue to work in EXACT while the patient is reviewing the Estimate.

Requirements / Prerequisites

• EXACT v11.3 SP7 or later.
• Clinipad registered and at least one device functional and available.
• A compatible Estimate template (where the signature box has been encoded using a special PRX command).

Limitations

• Signed Estimates are saved as read-only PDF forms so they cannot be altered or deleted.
• While a Clinipad is booked out against a patient for Estimate signing, the Dentist is constrained to working in that Patient File - an attempt to leave the Patient File will prompt a warning and the Dentist will need to first return the Clinipad session before being allowed to navigate away from the Patient File.

Using Clinipad Signed Estimates

This section includes procedures by Clinician and patient.

Creating Clinipad Signed Estimates

To create Signed Estimates (Dentist)
1. Create a CoT for a patient.
2. Create an Estimate by
   o Clicking the Estimates button in the CoT window:
   o Right-clicking the CoT and choosing the Create Estimate option, or
   o Right-clicking the CoT > Edit Course of Treatment > Create Estimate, or
   o Under Estimates Tab > +1 (Create Estimate)
3. Select the Date and Provider, then click OK:
4. Choose applicable Estimate details from the Print Standard Estimate window, and then instead of printing the Estimate, select the Clinipad button:

EXACT will check that the selected Estimate has a signature area defined, and that Clinipad device is available (if there is a problem EXACT will display an error message).

5. Select the Clinipad device to display the Estimate. In most cases there will only be one suitable device, and you can simply click OK:

**NOTE:** While the Clinipad session is active you are constrained to the current Patient File. Only when the Clinipad session has been returned by means of the Return button can you navigate to other patient files.

6. If necessary, tap Change Patient at bottom right on the Clinipad device to bring up that patient with the option to view their Estimate:

7. On the Clinipad, press the Estimate button to call up the Estimate, then explain the form to the patient and request a signature.
The Estimate displays on the Clinipad:

8. The patient reviews the Estimate and then taps the Sign button:

They are presented with a screen showing the first signature box on the form. From here they can Cancel if they want to go back, but the forwards options are not available until they have signed.

9. The patient reviews and signs the Clinipad Estimate using a finger or a stylus:

The signature field is labelled using the label defined in the EXACT Estimate layout (see "Configuring the Estimate signing areas" on page 45), so it can clearly state who is supposed to sign and what the signature is for.

For example, with appropriate configuration it is possible to have the patient sign and the dentist countersign...
in confirmation.

10. The patient selects the **Send** button to display the signed PDF form, and if satisfied with this form, selects the **Done** button:

![Clinipad front screen showing Send and Done buttons](image)

The Estimate button on the Clinipad front screen displays a check (tick):

![Clinipad Estimate button](image)

11. When the patient has either signed or decided not to sign the Estimate, click the drop down menu next to the Clinipad icon in your workspace bar to bring up an entry for Estimate, then click this to see a list of patient Clinipad Estimate sessions:

![Clinipad Estimates entry](image)

(If there are no patients with signing sessions open the drop down menu will inform you)

12. Click the session / patient name to end the session for that patient, remove their name from the list, and display the signed Estimate.

   If the session resulted in a signed Estimate it will be stored against the Estimate record in the Estimates tab as a PDF file. The listed record displays a Signed icon:

   ![Signed icon](image)

   If the patient **declined** to sign, the Estimate **record** will still be created, but there will be no PDF file stored against it.

   If the Estimate was returned by mistake, or you need to amend it before the patient will sign, return to the Chart and either create a new Estimate, or reprint the existing one from the Estimates tab.

13. Offer to physically print and/or Email the Signed Estimate to the patient from the Estimates tab, then select the Estimate and click the Print button.

   ![Estimates tab](image)

   Indicates that the Estimate has been signed and stored as a PDF file

   Open the PDF form with the signature. Either Print or Email this form

   This causes the PDF version of the Estimate to display in your Adobe Reader, from where you can Print or Email the PDF form using standard Reader functions:
Locating, viewing, printing, Emailing Clinipad Signed Estimates

For security reasons signed Estimates cannot be deleted.

To locate, display print or Email a Clinipad Signed Estimate

Either

- Recall the Signed Estimate from
  - Transactions > List Items > List Estimates > double click the Estimate, or
  - Patient Chart > Estimates Tab > double click the Estimate.

This displays the View Estimate window:

Click the View Signed Estimate button to view the PDF file in your Adobe Reader, from where you can print or Email it using standard Adobe Reader functions:
Select the Estimate in the Estimates tab and click the Print button:

For **unsigned** Estimates, this displays the Print Estimate screen with all available parameters, from where you can **create the signed Estimate** (see "Creating Clinipad Signed Estimates" on page 40).

For **signed** Estimates this simply opens the Form in your Adobe Reader, from where you can use standard Reader functions to print or Email the form.

**Configuring Clinipad Signed Estimates**

This section includes instructions for configuring the Clinipad for Signed Estimates.

*Configuring Clinipad for use away from Reception* (see "Configuring Clinipad for multiple computers" on page 65)

*Configuring the Estimate signing areas* (on page 45)

**Configuring the Estimate signing areas**

**EXACT** ships with appropriate Estimate signing templates, and it is unlikely that you will need to edit them. This guideline is only necessary should you need to edit or create your own.

*To access and edit Estimate form layout*

(Requires Administrator permissions)

1. Go to **Configure > Printing Setup...**
2. Locate Estimates in the Stationery and the Payor tabs. For example:
3. Get to the setup document as follows:

   a. Select a form
   b. Select the Edit button (or rightclick the form > edit)
   c. Select the Browse button against the Layout field
   d. Select a Layout
   e. Select the Edit button

4. Edit the text file using information from further down this page.
### Layout Configuration

To use Estimate signing, ensure that the Estimate that you want to sign has a signature field.

**EXACT** supports up to 3 types of Estimate (5 types in the UK, if NHS features are enabled).

Each has at least one default (delivered) Layout:

<table>
<thead>
<tr>
<th>Type</th>
<th>Purpose</th>
<th>UK templates</th>
<th>AUS templates</th>
<th>NZ templates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Estimate</td>
<td>Can show the treatment plan but no chart</td>
<td>SOEstd1.331</td>
<td>SOEstd1.331</td>
<td>SOEstd1.331</td>
</tr>
<tr>
<td>Pictorial Estimate</td>
<td>Can show the treatment plan and picture view of the mouth with treatment labelled</td>
<td>SOEstd1.358</td>
<td>SOEstd1.358</td>
<td>SOEstd1.358</td>
</tr>
<tr>
<td>Old Style NHS Estimate</td>
<td>(NHS Only) Prints onto a pre-printed FP17DC form</td>
<td>This Estimate does not function on Clinipad as the PRX signature area cannot be defined.</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>New Style NHS Estimate</td>
<td>(NHS Only) This contains all the information required to comply with being an NHS estimate. <strong>EXACT</strong> will automatically choose a default templates. See Estimate form templates</td>
<td>SOEStd1.424</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Depending on which types of Estimate you use, you may have to add the "SignatureArea" command to all of these Estimate layouts.

The **SignatureArea** command has the following syntax:

```plaintext
%SignatureArea:Left,Top,Width,Height,"label":%
```

The Left, Top, Width and Height values are calculated by measuring the distance from the top left of the page, and the width and height of the area that you want to be signable.

See the diagram below (the values are in 1/10ths of a millimeter):

For example, if you wanted the top of the signature box to be 25cm down from the top of the page, the Top value would be entered as 2500.

**Actual layout file:**

```plaintext
%SignatureArea:Left,Top,Width,Height,"label":%
```

Leaving the Top blank will put the top of the rectangle at the current vertical position on the layout, i.e.

```plaintext
SignatureArea:Left,,Width,Height,"label":%
```
Competencies for Clinipad Signed Estimates

**TIP:** Download, print and use the printable PDF versionClinipad Estimates Competencies Checklist

<table>
<thead>
<tr>
<th>Competencies Achieved</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a Clinipad Signed Estimate, issue it to the patient on Clinipad, guide the</td>
<td>40</td>
</tr>
<tr>
<td>patient through the process of signing the Estimate, and then return the Clinipad</td>
<td></td>
</tr>
<tr>
<td>device.</td>
<td></td>
</tr>
<tr>
<td>Locate, view and physically Print a correctly signed Clinipad Estimate.</td>
<td>44</td>
</tr>
<tr>
<td>Locate, view and Email a correctly signed Clinipad Estimate.</td>
<td>44</td>
</tr>
<tr>
<td>View a list of Estimate records and identify by means of an icon in the listings</td>
<td>44</td>
</tr>
<tr>
<td>which have been correctly signed and converted to PDF forms.</td>
<td></td>
</tr>
<tr>
<td>Correctly link one Clinipad device to two computers and confirm this by means of a</td>
<td>65</td>
</tr>
<tr>
<td>Clinipad on-screen indicator.</td>
<td></td>
</tr>
<tr>
<td>Configure a signature area for each Estimate Type that you will use in your dental</td>
<td>45</td>
</tr>
<tr>
<td>practice.</td>
<td></td>
</tr>
</tbody>
</table>

**Instructions to the Patient**

When you hand the device to the patient ask them to fill out the sections until all options have been ticked.

**Suggested instructions to the Patient:**

"If the correct name is not displaying, click the **Change Patient** button. If the correct name still does not show, please ask a staff member to assist."
See also the instructions for specific forms.

**Updating your Patient Details**

*To update your patient details information on the Clinipad*

1. Your dental practitioner will hand you a Clinipad tablet.
2. Check the Name at top right of the screen.
   - If it is not your name, tap the Change Patient button at bottom right on the screen to refresh the screen and display your name.
   - If it is still not your name, please ask your dental practitioner for help.
3. Tap the **Patient Details** button to display a **Patient Information** screen:

![Patient Information Screen]

4. To change any field, tap that field and then type by means of the on-screen keyboard:
5. When all fields are as correct as you can make them, tap the Send button. Back on the main screen you should now see your Patient Details as checked (ticked):

6. Either tap the next Form for completion or return the Clinipad device to your dental practitioner.

NOTE: There is no need to digitally sign a Patient Details Form.
Updating your Medical History

To update your Medical History information on the Clinipad

1. Your dental practitioner will hand you a Clinipad tablet.

2. Check the Name at top right of the screen.
   - If it is not your name, tap the Change Patient button at bottom right on the screen to refresh the screen and display your name.
   - If it is still not your name, please ask your dental practitioner for help.

3. Tap the Medical History button to display a Medical History screen:
You may see an **Advanced** screen where you have multiple options for each medical health issue:

**Yes, No and Neither (Don't know / Neither)**

- **Yes**  
  - ✔ Heart Murmur
- **No**  
  - ✔ Angina
- **Neither**  
  - ✔ Thrombosis

4. Tap a checkbox to check (tick) it, and tap again to clear it.
5. For any text input box, tap to display a keyboard that you can use for typing:

![Keyboard](image)

6. The Form is over multiple pages, so drag on the screen to scroll up and down.
7. Sign in the Signature box with your finger or with a stylus. If you need to try again, first tap the **Clear** link to clear the Signature box.
8. When all fields are as correct as you can make them, tap the **Send button**.
9. Preview the display that then appears on the screen to check that all is correct.
10. Tap the **Done** button at top left (if you cannot see the button, tap the screen to make it appear).

Back on the main screen you should now see your **Medical Details** as checked (ticked):
11. Either tap the next Form for completion or return the Clinipad device to your dental practitioner.

**Updating your FP17 information**

*To update your FP17PR (Wales FP17PRW) information on the Clinipad*

1. Your dental practitioner will hand you a Clinipad tablet.
2. Check the Name at top right of the screen.
   - If it is not your name, tap the **Change Patient** button at bottom right on the screen to refresh the screen and display your name.
   - If it is still not your name, please ask your dental practitioner for help.
3. Tap the **FP17** button to display the **Practice Record Form - Patient Declaration** screen:
4. Tap a checkbox to check (tick) it, and tap again to clear it.

5. For any text input box, tap to display a keyboard that you can use for typing:

6. The Form is over multiple pages, so drag on the screen to scroll up and down.

7. Sign in the Signature box with your finger or with a stylus. If you need to try again, first tap the Clear link to clear the Signature box.

8. When all fields are as correct as you can make them, tap the Send button.

   This will cause a Preview box to display in order for you to preview your screen.

9. Tap the Done button at top left (if you cannot see the button, tap the screen to make it appear).

   Back on the main screen you should now see your FP17 as checked (ticked):

10. Either tap another Form for completion or return the Clinipad device to your dental practitioner.
Signing your treatment Estimate on Clinipad

Instructions to patients:

Estimates are created by Clinicians for anticipated treatment and costs, and displayed on Clinipad for you to digitally sign.

To sign an Estimate on Clinipad (Patient)

1. The Clinician creates the Estimate and transfers it to Clinipad.
2. When you receive the Clinipad device, check that it is your name at top right and then select the Estimate button:

   ![Clinipad Estimation Screen]

   The Estimate displays as a PDF form.

   ![Estimate Form]

   3. Carefully review the information.
4. If you find it acceptable, tap the Sign button:

   ![Sign Button]

   You will see a screen showing the first signature box on the form. Cancel if you want to go back, but the forwards options are not available until you have signed.
5. Sign the Clinipad Estimate using a finger or a stylus:
6. Select the **Send** button to display the signed PDF form, and if satisfied with this form, selects the **Done** button:

   ![Send button](image)

   The Estimate button on the Clinipad front screen displays a check (tick):

   ![Estimate button](image)

7. Hand the Clinipad back to the Clinician.

**Completing your Oral Health Survey on Clinipad**

**Instructions to patients:**

This is a no-obligation, no-pressure survey, with no signature required. It can be conducted from Reception or from the Clinic, on paper or on the Clinipad. The Dentist will review it and discuss Oral Health treatment with you in order to improve your health in the direction that you indicate.
To complete your Oral Health Survey on Clinipad (Patient)

1. A Receptionist or a Clinician will hand you the Clinipad.
2. Tap the *Your Oral Health* button:

![Your Oral Health button](image)

3. Tap to select (tick) all applicable buttons:

![Survey screen](image)

4. Tap in a text box to display the screen keypad, and use it to type applicable text:
5. Tap the **Send** button when finished.

6. Tap the **Done** button:

On the main Clinipad screen you will see that the **Your Oral Health** button is checked (ticked):

7. The Clinician will discuss your Oral Health Survey at your appointment.

**Signing your Terms and Conditions document**

**Instructions to patients:**

Please use the Clinipad device to digitally sign our Terms and Conditions statement.

*To sign the Terms and Conditions on the Clinipad*

1. A Receptionist or a Clinician will hand you the Clinipad.
2. If this is a Family Appointment, please select your name:
   (note that each family member needs to sign separately)
3. Tap the Terms and Conditions button:

![Screenshot of the Clinipad app interface showing the Terms and Conditions button]

4. Read the Terms and Conditions on the screen (the signature area is not interactive in this screen):

![Screenshot of the Terms and Conditions document]

5. Select the Sign button at top left:

![Screenshot of the Clinipad app interface showing the Sign button]

6. Sign by means of a pen, stylus or finger in the Patient’s Signature area:
7. With your signature completed, select the Send button:

(Select the Clear hyperlink at top right of the signature box if you need multiple attempts)

8. Do a final check with your signature displayed in context:

9. Select the Done button at top left:

On the main Clinipad screen you will see that the Terms and Conditions is now checked (ticked).
10. If you are part of a family appointment, select the Change Patient button to offer the device to another family member:
Configuring Clinipad

Setup and configuration topics.

Installing and configuring Clinipad

Purchase the Clinipad Module from Software of Excellence.
Set up the system as described below.

To set up the iPad
1. Join the iPad to the Wi-Fi
2. Install the Clinipad SOEI app from the app store
3. Go into Settings and go to the Clinipad SOEI section (bottom left of settings)
   a. Set IP address or host name to the Server Computer Name or I.P. address
   b. Set Port Number to the default port: 8082
   c. Set the Root folder to ClinipadSOE (Case-insensitive)

To lock down the iPad
1. Make sure there are no network browsing applications already on the device (this would allow patients to delete shared databases!).
   It is advisable to have as few apps as possible on the device.
2. In Settings > iCloud, type in the Apple account details and sign in.
   a. Make sure that Find My iPad is enabled.
   b. Optionally download the Find my iPhone app.
3. In Settings > General > Restrictions
   a. Set a non-obvious password
   b. Turn off everything in the Allow section
   c. In Allowed content, set the Require Password setting to Immediately and turn off On-app purchases on iOS 5.
   d. In Game Centre turn off everything.
   e. In Allow Change click into Accounts and select Don't allow Changes.
   f. In Location Services Don't Allow Changes to location services.
4. In Settings > General > Auto-Lock, turn this setting up to max (15 minutes).
5. In Settings > General > Keyboard > Turn off Auto-Correction and Check Spelling.
6. For iOS 6 and above, in Settings > General > Accessibility, Enable Guided Access.
7. Record the two passcodes above and issue them to the practice and to SOE support.

Adding and Pairing Clinipad Devices

To register a Clinipad device / Pair a device

This procedure starts in EXACT and ends on the Clinipad device.

In EXACT:
1. Either
   o Select Administration > Clinipad, and select the Spanner (Setup) button at bottom right of the screen.
- or -
  o Select the Clinipad icon in the workspace bar (if it has been added to the workspace bar), and then select the Spanner (Setup) button at bottom right
- or -
  o In the Clinipad tab below the Appointment Book, select the Spanner (Setup) button at bottom right.

2. In the Installation screen that displays,
   a. Type a **Device Name**.
   b. Select the **Create Device button**.

On the Clinipad device:
1. Run the Clinipad SOEI application.
   It should connect and show the unpaired device(s).
2. Click **Pair Device**.
   The tablet will now be paired and display the Clinipad Home Screen.

### Configuring Clinipad for multiple computers

**Background:**

Only **EXACT** computers with access to a Clinipad can issue a session on that Clinipad.

Clinipads are not only used in Reception; Clinicians may also use Clinipads for counter-signing patient signatures and for Estimate signing by the patient.

However, you probably don’t want a Clinipad that is meant only for a Clinic actions to be seen or opened from a Reception computer, or a Reception Clinipad opened in a Clinic.

To avoid practitioners accidentally assigning patients to Clinipad devices in the wrong rooms you need to **plan and configure** which computers in the dental practice can use which Clinipad devices.

With correct configuration, when requiring Clinipad from an **EXACT** computer, only Clinipad devices **linked** to that computer show in the **EXACT** drop down list.

For example, the clinic computer running this **EXACT** software has only one linked Clinipad:
To see ALL Clinipads in the dental practice

When looking at the returns list you will normally only see sessions on those Clinipads that are available to your computer.

However, you can un-check the Only show available devices checkbox at the bottom of the returns list to see all of the issued Clinipads in the practice:

To configure Clinipad availability to computers

1. Plan the assignment of Clinipads to computers in different areas of your practice. You want only the appropriate computers to be able to see each device.
   
   For example, a group of reception computers might all share five Clinipads, but each clinic may have its own dedicated Clinipad.

2. On a Clinipad Configuration screen, select the computer symbol:

   A Linked Computers list displays all networked computers.

3. Link the Clinipad to computers by checking (ticking) the computer checkboxes:

4. Click OK.
The Clinipad will then be available to those checked computers.

5. Repeat for all Clinipads.

Clinipad devices display how many computers can issue and return sessions:

In the Clinipad configuration screen the "computer" icon shows how many computers can issue and return sessions to that Clinipad device:

A Clinipad device linked to computers will show the number of computers:

A Clinipad device that is available from any computer will show a sigma icon:

To see the computers to which a Clinipad is linked, simply select this "computer" icon and a list will display.

Other configuration screen functionality:

The Clinipad screen displays the name of the patient who is currently using the device. Select the name to go directly to that patient file.

Select the disconnect button to immediately release the device and discard any session data.

Setting up Adobe Reader to view signed Clinipad forms

**IMPORTANT:** This must be completed on the Server and on each Workstation.

*To set up Adobe Reader for viewing signed PDF forms in EXACT*

(Setup on the Server and on each Workstation)
2. Untick the optional offer(s).
3. Click Install Now.
4. This will download an installer onto your PC.
5. Install Adobe Reader and set it as the default PDF viewer.
6. Add ‘SOE’ to the trusted certificates list through Adobe Reader
   a. Open the MedicalHistorySamplePDF.pdf file from here: 
      http://help.soeidental.com/11.4/PDFs/MedicalHistorySamplePDF.PDF
   b. When the Security Warning message appears press Yes.
   c. When the example signed PDF prompt appears press OK.
   d. Accept the Distribution License.
   e. When the Trusted Certificates Update prompt appears press OK.
   f. Click the Signature Panel button above the example PDF.
      A side menu will appear.
   g. Expand the Rev.1: Signed by Unknown folder > Expand the Signature Details > Click Certificate Details...
   h. Navigate to the Trust tab > Click the Add to Trusted Certificates... button.
   i. Press OK to the Adobe Security and then OK again on the Import Contact Settings.
      You may see an error, but this doesn’t necessarily mean that it has failed.
   j. Close Adobe and click Register Certificate again. Adobe should now say that the document is "Signed and all signatures are valid."

7. Follow this installation procedure on the Server and on every workstation where Clinipad forms will need to be viewed in Adobe Reader.

**Adding Clinipad to the Workspace and Activity bars**

Practitioners such as Receptionists who use Clinipad frequently are advised to add the Clinipad shortcut to the Workspace bar (at the top of the screen) and / or add the Clinipad Tab to the appointment book activity bar (below the appointment book), so that it is quickly accessible.

**TIPS:**

If you add the link to the Workspace bar users can access it from any screen.

For Receptionists the link is most useful on the Activity Bar (below the appointment book)

The procedure is the same for both areas.

**To add the Clinipad Window shortcut to the workspace bar**

1. Right-click the workspace bar and select Customise...

2. In the Select tabs dialogue, select the the Clinipad icon in the left pane and move it to right pane by clicking the >> button.
3. Position it in the right pane by moving it with the up and down arrows.

   **NOTE:** This position determines the horizontal ordering of the shortcuts on the workspace bar.

4. Select the **OK** button.

5. Check that it displays as a shortcut on the workspace bar.

---

**To add the Clinipad Tab to the appointment book activity bar**

1. Click the **Configure** button at bottom right of the Appointment Book
2. In the Wizard, check (tick) **Select tabs for your activity bar**:
3. Click the **Next >** button, and then click the **Next >** button on the following screen.

4. In the Select tabs dialogue, select the the Clinipad icon in the left pane and move it to right pane by clicking the **>>** button.

5. Position it in the right pane by moving it with the up and down arrows.

   **NOTE:** This position determines the horizontal ordering of the tabs on the appointment book activity bar.
6. Select the Finish button.
7. Check that it displays as a tab.

Configuring Appointment Arrival Options

From EXACT v11.6 all Clinipad arrival options can be configured from a single screen.

To configure Clinipad Arrivals options

Select Configure > Appointment Book, and in the Appointment Book Setup screen, select the Arrival Options button:

Configure the Appointment Arrival Options window as described below:
Check patient details every [x] months

Set how often to ask patients to check their details. Patient details are sent to Clinipad alongside every other request for a form or update, so this option only comes into its own if no other forms are due when the patient checks in.

Note that 0 months = Don’t check patient details

From v11.6 this configuration is no longer in the Configure > Patient File screen.

Terms and Conditions Enabled

This check box toggles the entire Terms and Conditions feature on or off.
Who needs to sign a Terms and Conditions document:

This provides three options for when to generate the request for terms and conditions, and for whom:

- **New Patients only:**
  Previous Terms and Conditions documents were collected on paper.
  This option is for practices that have routinely been collecting terms and conditions documents from their patients using a paper system. The arrivals process will only state that the document needs to be collected for new patients.

- **Patients with no Terms and Conditions document on file:**
  This option is for practices that have not been collecting terms and conditions, but are going to start now, or practices starting to collect terms and conditions on the computer system using new forms. All patients without a record of terms and conditions stored on the computer system will be asked to sign a copy.

- **Patients who haven’t signed a since Terms and Conditions last changed on [Date]:**
  This option is for practices that have been using terms and conditions on the computer for a while, but then need to update their terms and conditions, meaning those that have already signed must sign again. Choose this option and the date the change occurred to make patients receive a request to sign, if they haven’t yet signed the updated document.

**Edit Terms and Conditions:**

This is the plain text statement for the patient to sign. Type it in or paste (CTRL+V) from your existing terms and conditions document. Formatting is limited to spacing and carriage returns.

---

**Medical History button**

*To configure Clinipad Medical History*

Select Configure > Appointment Book, and in the Appointment Book Setup screen, select the Arrival Options button.

Click the Medical History button to open the Medical History Configuration.

(This configuration is also accessible in the Patient Medical tab)

<table>
<thead>
<tr>
<th>Custom Medical History</th>
<th>Gives you an additional choice of any custom screen to be your practice medical history form. <strong>You cannot use this option in Clinipad.</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Medical History</td>
<td>Allows you choose between two fixed forms: Simple and Default. <strong>A Fixed Medical History Form is required for Clinipad.</strong></td>
</tr>
</tbody>
</table>
Alert if medical notes [x] months overdue

use this to set how often to request the patient to update their history.

Printable Version

Enables you to pick a template to use if you wish to print out medical history forms for patients to use. The chosen template can include merge fields containing basic patient information, saving them time when filling in the form. The chosen template should contain the same information as the form selected in the custom or fixed.

Oral Health Survey button

Configuring the Oral Health Survey

Select Configure > Appointment Book, and in the Appointment Book Setup screen, select the Arrival Options button.

Click the Oral Health Survey button to open the Oral Health Surveys Configuration.

(This configuration is also accessible in the Patient's Chart tab on the Oral Health activity tab):

Oral Health Surveys Enabled checkbox:

This is a toggle that enables you to turn on or off whether Clinipad requests Oral Health surveys at all.

Un-check if you don’t want to use the survey.

Patients should be asked to fill out an Oral Health Survey every [x] months:

Determines how often the patient is requested to fill in a Survey.

Collect Oral Health Surveys before appointments with [x]

Choose whether the request should occur before only dentist appointments, or before all provider appointments.

Template to use when printing a paper form

Pick a paper version of the survey form. The chosen template should contain the same questions as the onscreen survey.
Select Questions (x currently Selected) button

Opens a popup which lets you choose which questions are included in Oral Health Survey.

Here you can see all the available questions and tick the ones that you want to use.

You cannot un-tick all questions.
Confusing Medical History Forms and Reviews

**IMPORTANT:** If you want to change your Fixed Medical History Form between *Simple, Default and Advanced* be aware that prior medical history information will *not* be retained on the new form, which will start from blank.

(EXACT will warn you of this fact when you attempt to change)

From EXACT v11.10 there is an option to require that the Medical History be reviewed in the surgery, and if this is required, whether a Dentist counter-signature is required on the form.

From EXACT v11.10 an *Advanced* version of the form allows three answer options: Yes, No and Don’t Know:

<table>
<thead>
<tr>
<th></th>
<th>Heart Murmur</th>
<th>Angina</th>
<th>Thrombosis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Neither</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Configuration Options:**

The Medical History configuration is *per Provider*. i.e. Providers in your practice can use different configurations. From the Medical History Configuration you can configure as follows:

- Set an alert for overdue medical notes (this can also be done from the Configure > Patient File screen).
- Choose whether to customise a form or select a fixed template.
  - If using a custom form, specify the custom screen used for the medical questionnaire.
  - If using a Fixed form, select from options: *Simple, Default and Advanced* (see samples below)
- For Clinipad, require that the Medical History Form be reviewed in the surgery by a Dentist.
  - With this option, also require that the Dentist counter-sign the form after reviewing it with the patient.

**To edit the Medical History Configuration:**

1. From the Medical tab, click the [Configure] button to open the Medical History Configuration.

Users without permissions to the Configure-Patient File screen *will not see* this configure icon.

From EXACT v11.10 this screen includes custom settings per user that were previously configurable in User Settings.
If you are logged in as a provider, this section will default to showing your own settings. If you are not a provider, but are logged in as an administrator it will just show the first provider in the list. As an administrator you can change settings for a displayed provider, and these will be saved when you click OK or change to another provider.

The option to have the medical alert icon flashing has been moved from the user screen to this window.
The option to open the medical history window automatically when a patient is moved to the chair has been moved from the Providers appointment tab to this window. These settings are unchanged but are now located more logically with the other medical history options.

2. Decide whether to use a Custom medical history form or a Fixed template.

---If Custom---

3. Specify the custom screen used for the medical questionnaire (the system comes with a default screen, but this can be customised or you can create new screen options by means of the Configure > Custom Screens menu item):

Choose the required Medical Questionnaire by either

- Entering the appropriate code, or
- Using the (up/down) buttons, or
- Click the (List) button to display the available options, select an option, and then click OK:
This questionnaire has been configured from the Patient File Configuration > Custom Medical Questionnaire.

**TIP:** If you need to create a new custom screen, or edit an existing one, you can do this (provided you have the appropriate security permissions) via the Configure > Custom Screens menu item.

---If Fixed---

4. Select the **Fixed Medical History** radio button. You'll see that the drop down menu becomes accessible:

5. Select either **Simple**, **Default** or **Advanced** option from the drop down menu (see screen samples further down this page):

   - **Default** is available from v11.3 SP5.
   - If you use **Simple**, on upgrade to v11.3 SP5, Simple will still remain applicable unless you change it.
   - **Advanced** is available from v11.10.

   **IMPORTANT:** If you want to change between these options, be aware that prior medical history information will **not** be retained on the new form, which will start from blank. **EXACT** will warn you of this fact when you change:

   - The **Alert if medical notes x months overdue** field will cause the Medical Status to display a **Medical Record Out of Date** notification, if for a patient it has been more than that number of months since the medical questionnaire was last updated.
7. Select a user from the **User settings for** dropdown list:
   (The options that you configure in the **User settings for** box will apply to this Provider only)

8. Checkbox - specify whether the Medical Alert must flash for this user.
   Leave this box checked to cause the medical alert icon shown below to flash at the top of a patient’s details view if the patient has a medical condition. This is useful too in circumstances where a patient has both the medical and infectious alerts active, as it will alternate between each icon. However, some users prefer to have the flashing icon turned off as it can be distracting.

   Prior to v11.10 this setting was in the Configure > User Settings window.

9. Checkbox - specify whether the Medical History Form must open when this user selects Move to Chair to move the patient from reception to clinic.

   If set, this option will cause the medical history tooltip to open in a window when either of the "Move to chair" buttons (Patient preview, or Sidebar appointment book) is clicked. This allows the provider to view the patient’s medical history and update it if required.

   Prior to v11.10 this setting was in the Configure > User Settings window.

10. **(Clinipad only)** Checkboxes - specify a strategy for this User’s review of the Forms, with options as follows:

    - Have patient sign Medical History in surgery
    - Require dentist signature

   Clinician review and signature is not required.

   The form only has a patient signature area.

   The patient completes and signs the form independently in Reception and hands it back to the Receptionist.
In this scenario,

When the patient fills in the medical history form as part of the arrivals process, they are not asked to sign the form, and a PDF copy of the form is not created.

When the patient goes into the surgery and the dentist reviews the medical history, some text informs them that there is new medical data that needs to be signed.

Using the **Update MedHist using Clinipad** then sends the new data back to Clinipad where it can be reviewed with the patient, and this time there is a signature box present for the patient (but not for the Dentist in this scenario).

Once the patient signs this, Clinipad generates a PDF.

This scenario is exactly as the one above, but when the patient signature box appears, so does a signature box for the Dentist to counter-sign, after which **EXACT** generates the PDF.

11. Select **OK** to save the Medical History Configuration.

**Sample Medical History Forms**

**Simple:**

![Simple Medical History Form](image-url)
Default:

<table>
<thead>
<tr>
<th>Habits</th>
<th>Warnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smoke (per day)</td>
<td>Pregnant or possibly pregnant</td>
</tr>
<tr>
<td>Chew tobacco (per day)</td>
<td>Do Not Recline</td>
</tr>
<tr>
<td>Alcohol (units per week)</td>
<td>Steroids within 2 years</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Heart</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rheumatic Fever</td>
<td>Heart Murr</td>
</tr>
<tr>
<td>High Blood Pressure</td>
<td>Angra</td>
</tr>
<tr>
<td>Heart Surgery</td>
<td>Thrombosis</td>
</tr>
<tr>
<td>Pacemaker fitted</td>
<td>Other Heart Conditions</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chest</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bronchitis</td>
<td>Emphysema</td>
</tr>
<tr>
<td>Cystic Fibrosis</td>
<td>Pneumonia</td>
</tr>
<tr>
<td>Pleurisy</td>
<td>Chest Surgery</td>
</tr>
<tr>
<td>Asthmatic</td>
<td>Other Chest Conditions</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Blood</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hepatitis B</td>
<td>Anaemia</td>
</tr>
<tr>
<td>HIV,</td>
<td>Sickle Cel</td>
</tr>
<tr>
<td>Abnormal Blood Test</td>
<td>Haemophilia</td>
</tr>
<tr>
<td>Blood reduced by transfusion intra.</td>
<td>Other Blood Conditions</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Medication</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Penicillin</td>
<td>Latex Allergy</td>
</tr>
<tr>
<td>Nystagmus</td>
<td>Medicines</td>
</tr>
<tr>
<td>Anti Tetanus Serum</td>
<td>Plants</td>
</tr>
<tr>
<td>Eczema</td>
<td>Foods</td>
</tr>
<tr>
<td>General Anaesthetic</td>
<td>Aspirin</td>
</tr>
<tr>
<td>Local Anaesthetic</td>
<td>Other Allergy Conditions</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Allergies</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liver Disease</td>
<td>Kidney Disease</td>
</tr>
<tr>
<td>Diabetes</td>
<td>Epilepsy</td>
</tr>
<tr>
<td>Acid Reflux or Eating Disorder</td>
<td>hiatus Hernia</td>
</tr>
<tr>
<td>Bone or Joint Disease</td>
<td>Articular Joint</td>
</tr>
<tr>
<td>Fainting Attacks or Blotkours</td>
<td>Giddiness</td>
</tr>
<tr>
<td>Fast Serious or Infectious disease</td>
<td>Cancer</td>
</tr>
</tbody>
</table>
This Advanced form is available from v11.10 for both on screen and Clinipad. It features questions with three answer options: Yes, No and Don’t know:

- **Yes**: Heart Murmur
- **No**: Angina
- **Neither**: Thrombosis

It has new fields for Hearing or Sight Impairment, Depression, Stroke, Nervous Problems, Tuberculosis, Severe Headaches and Cold Sores.
Configuring Clinipad Estimate signing

See:

Configuring Clinipad for use away from Reception (see “Configuring Clinipad for multiple computers” on page 65)

Configuring the Estimate signing areas (on page 45)

Checking Clinipad module registration

Before trying to use the Clinipad module you need to ensure that it is registered.

To check if the Clinipad module is registered

1.  Go to Configure > Practice Information and click the Register button at top right.

2.  In the Register window, check if Clinipad is registered:

Registered:

Not Registered:

3.  If it is not registered, please contact Software of Excellence to purchase the module and arrange set up.

Troubleshooting Clinipad

To troubleshoot Clinipad - general

When Clinipad does not seem to be functioning, try the following:

Restart the Clinipad Soei application on the device

If it failed to connect immediately,

1.  Check the settings described above,

2.  Kill the application and restart it as follows:

   a.  On the device go to the following web address: <server IP number>/clinipadSOE

   b.  Click Start Pairing

   c.  Click Pair device
d. Click **Send**

3. If the application continues to malfunction, use the following steps to restart it:
   a. Double tap the home button on the device
   b. Locate the Clinipad Soei application and swipe the application upwards to close it
   c. Press the home button again
   d. Re-run the Clinipad Soei application.

**Ensure that the Clinipad link service is running**

Start > Run > services.msc > Clinipad link service.

(If the service is not running you will notice that the Manage Clinipad Devices window will run extremely slow and the amounts of devices available will be 0/1)

**To troubleshoot Clinipad - Apache is not running**

Clinipad Apache didn’t auto-start on install.

1. Start button > Run > services.msc > OK
2. In the Services application look for the service named: **CliniPadApache**
3. Right click **CliniPadApache** and press **Start**

**To troubleshoot Clinipad - ClinipadLink service is not running**

ClinipadLink service didn’t auto-start on install

1. Start button > Run > services.msc > OK
2. In the Services application look for the service named: **CliniPad link service**
3. Right click the CliniPad link service and press **Start**.

**To troubleshoot Clinipad – DNS issues**

If EXACT cannot communicate with the ClinipadLink server you will see an error message:

"Could not communicate with the ClinipadLink Service. Please ensure that it is correctly configured and running."

There are two possible actions to take:

**Clear DNS cache:**

1. Start > Command Prompt > ipconfig/flushdns

**Check router DNS settings:**

1. Log in to your router (the procedure varies depending on router make/model)
2. Check and then if necessary, correct your DNS settings on the router.
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ADDENDUM 1: How to release a locked Clinipad

(v12.0)

From v12.0 onwards, when a patient is locked on a Clinipad device an Administrator-level user can release the lock.

Note that the session may lose data during this procedure.

1. As an Administrator-level user, open the Clinipad Configuration screen:
   Either
   - Select Administration > Clinipad, and select the Spanner (Setup) button at bottom right of the screen.
   - or -
   - Select the Clinipad icon in the workspace bar (if it has been added to the workspace bar), and then select the Spanner (Setup) button at bottom right
   - or -
   - In the Clinipad tab below the Appointment Book, select the Spanner (Setup) button at bottom right.

2. Locate the locked Clinipad. You'll notice an additional Release button on the screen:

3. Click the Release button to close the connection between Clinipad and <exact>.

4. Click the Return button in the Clinipad tab or desktop.

5. Ignore the error message: "Failed to release Clinipad device" (it has already been released).

Note that the session may lose data during this procedure.