The **View Patient History** button is located above the Treatment Planning area between the 3D and New treatment plan buttons:

Select the View Patient History button (H) to display the **Tooth History** window:

![Tooth History Window](image)

This shows a record of the patient’s historical and current treatment, including:

- The date the treatment was completed or planned
- The provider who completed or planned the work
- A graphical representation of the service (if applicable)
- The service code including tooth number and surfaces
- Particulars of each line item
- The total fee
- The patient and payor portions of the total fee
- Any clinical notes, invoice notes or custom screens that are attached to services.
- Details of any treatment that has been flagged as **Failed**, for inclusion in the Clinical Audit Report (tick the **Show Failed** checkbox to display Failed treatments)
- (Optional) Voided items - these are not deleted, simply hidden from view by default. Check the **Show Void** checkbox to view voided items, which are identified by the voided icon:

![Voided Items](image)
Treatment can be sorted in three ways:

- **Sort by Date**  
  Sort by Date arranges treatment carried out by date

- **Sort by Tooth No.**  
  Sort by Tooth No. groups treatment by tooth.

- **Sort by Plan**  
  Sort by Plan groups treatment within a Course of Treatment

Historical Treatment is sectioned into areas for:

- Base Chart items
- Historical Chart items
- Current uncharged treatment items

The Base and Historical sections display treatment that has been completed and either Charged or added to History.

The Treatment Planning area displays treatment currently planned for the patient. The treatment text is displayed in the colour of the provider logged on when the treatment was charted.

**To collapse and expand ALL sections of the history list**

The list opens expanded and you can see all items.

Use the two buttons at bottom right to collapse all or expand all.

You can then use the normal + - icons to expand or collapse specific sections.

**To display the history of specific teeth only**

To search Treatment / Tooth History

Use the **Search** field to search for anything that matches the entered text, including Service names, Notes, Custom screens (both field names and data), and provider codes.

While the search uses exact matching, it is not case-sensitive. For example, searches for both **EXAM** or **exam** will match any of the following:

- Full Examination
- EXAME
- Patient came in for exam and Xrays.

Once you click the search button  the resulting matches display in a Search Results window:
The search text remains in the Search field until the Tooth History window is closed, enabling you to edit and refine your search criteria and conduct further searches.

**Viewing historical and current treatment for a specific tooth**

To view historical and current treatment for a specific tooth

1. From the Patient desk > Chart tab ensure that either the Permanent or Deciduous Tooth Chart is displayed.
2. Double-click just under or above the required tooth (i.e., not directly on the tooth itself), and the Treatment History window will open displaying only treatment for that tooth:

**Reading Notes in Treatment / Tooth History**

To read Notes in Treatment / Tooth History

Where services have clinical notes attached, the 📜 symbol appears to the left.

The Tooth History window displays only the first four lines of each note - if a note is longer than four lines, three dots will appear next to the symbol.

Double-click the symbol to read the entire note.
Voiding historical Treatment Items

Historical treatment cannot be deleted, but if treatment has been entered incorrectly it can be **voided** so that it is removed from the view.

**To void historical treatment items**

1. Select the Treatment line to be voided
2. Click the **Void** button:

A warning will display:

3. Click **Yes** to confirm that you wish to void this treatment or click **No** to return to the previous window.

**NOTE:** Voiding an item in history does not affect the patient’s account.

If the item to be removed has a related invoice that must also be altered, it is recommended that you first ask your administrator to correct the transaction before you void.

Depending on the method chosen, it may automatically void the treatment in clinical history for you.
**To display voided Items**

Items that have been voided are identified with a voided icon:

![Voided Icon](image)

Voided items are not displayed by default in Treatment / Tooth History. To display them, check (tick) the **Show Void** checkbox:

![Show Void Checkbox](image)

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**Displaying Voided Items**

**To display voided Items**

Items that have been voided are identified with a voided icon:

![Voided Icon](image)

Voided items are not displayed by default in Treatment / Tooth History. To display them, check (tick) the **Show Void** checkbox:

![Show Void Checkbox](image)

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**Failed Treatment (for Clinical Audits)**

Historical treatment that has been deemed to have *failed* from a cosmetic or other standpoint (for example, a crown that has cracked or become discoloured) can be marked as failed. All such failures marked in this way can be reported via the Clinical Audit Report, which for BACD members can then be submitted to the BACD.

*Non*-BACD members can use this report as an on-going means of quality assurance monitoring.

**To mark treatment as having failed:**

1. In the patient Chart, click the **View Patient History** button:

![View Patient History](image)

2. In the **Treatment / Tooth History** window, select the failed treatment and click the **Mark treatment as failed** button:

![Mark treatment as failed](image)
3. Specify the failure mode in the **Enter Failure Mode for Treatment** window:

   ![Image of Enter Failure Mode window]

   a. In the **Failure Mode** field, select the appropriate Failure Mode from the list for this service type.
   b. The date defaults to today's date, but may be changed if required.
   c. Optionally describe the failure in the **Note** field.
   d. Click the **OK** button to save the details and exit the window.

4. The Tooth History window will now display the Failure details below the COT item, as in the example below:

   ![Image of Tooth History window]

   This information will be collated when you run the Clinical Audit Report from the **Administration > Reports** menu.

### Setting Recalls

When a Provider completes a treatment, EXACT prompts for confirmation of Recall details for that particular patient. The Provider can reject or edit suggestions before confirming the recall details.

**Changes:**

- **From EXACT version 11,** the Recall Prompt is constrained:
  - Only Providers with the appropriate setting in the Recall Manager configuration see the Recall Prompt.
  - Receptionists do not see the Recall Prompt.
  - The Recall Prompt only displays when EXACT calculates that some patient recall parameter needs to change, in which case it identifies suggested changes in **red text.**

- **From EXACT version 11.3 SP6,** the recall prompt allows Providers to either reject EXACT suggested recall updates: ⚠️, or re-instate them after rejection: ⚡️.

### To set the Recalls based on **EXACT** suggestions

1. When Providers with the appropriate settings finalise a treatment, they are prompted for patient recalls.

   For example:
The words in **red text** are suggestions from EXACT, following the treatment that the Provider is now completing.

There are three possible actions to perform with the screen:

- Edit the suggested changes by means of the blue hyperlinks.

- Reject the suggested changes by means of the ![Reject](image)
  button.

- When the recall details are correct, click the ![OK](image)
  button.

2. To reject these changes, select the ![Reject](image)
   button and then click **OK**. Note that once you reject the changes, the button toggles to ![Reinstall](image), which you can click to **reinstall** the suggested changes that you rejected.

3. To edit these recall details, click the blue **Recall** hyperlink/s, for an **Edit Recall Detail** screen, change the fields, then click the **Update** button:

4. To accept these suggestions and / or any edits that you made, simply click **OK**.

   The information will then be updated in the Recalls Due area in the Patient's Recalls Tab.

   See also: Patients Recalls Tab
Other:

If you set the recall to Do not recall patient...

... then the recall details screen will include both toggle buttons, enabling you to either reject suggestions or reinstate the previous suggestions:

Searching Treatment / Tooth History

To search the Treatment / Tooth History

Use the Search field to search for anything that matches the entered text, including Service names, Notes, Custom screens (both field names and data), and provider codes.

While the search uses exact matching, it is not case-sensitive. For example, searches for both EXAM or exam will match any of the following:

- Full Examination
- EXAME
- Patient came in for exam and x-rays.

Once you click the search button the resulting matches display in a popup window with the same layout as the History window:
The search text remains in the Search field until the Tooth History window is closed, enabling you to edit and refine your search criteria and conduct further searches.