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The **Appointment Workflow** provides a structured practice process for tracking and managing patients as they arrive, are processed in reception, pass through treatment in the Clinic, and then pay, rebook and are managed at departure through reception.

Each dental practice role in this workflow uses integrated software that tracks patient progress and triggers the next step in the workflow. Receptionists are particularly advantaged by the Departure Task List which automates the required tasks for patients departing the practice.

The departure task list facilitates Receptionist booking of patients for further planned treatment, and can be customised to prompt for recall appointments or tasks such as capturing patient details, issuing practice brochures, or informing patients of special offers.

**Looking for a user quick reference? See Using the Departure Task List (on page 36)**

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**Overview**

- **Purpose** (see "Purpose of Appointment Workflow" on page 8)
- **Benefits** (see "Benefits of Appointment Workflow" on page 11)
- **Features** (see "Features of Appointment Workflow" on page 9)
- **Requirements** (see "Requirements for Appointment Workflow" on page 12)

**Using**

- **Clinical Workflow** (see "Clinical workflow (IMPORTANT to understand!)" on page 14)  
  (Receptionists and Providers must understand this)
- **Resetting Appointment Status** (see "Resetting and Editing Appointment Status" on page 17)
- **Provider tasks in the Workflow** (see "Provider tasks in the Appointment workflow" on page 22)
- **Moving the patient to the Chair** (on page 23)
- **Moving the patient to Departure** (on page 28)
- **Receptionist tasks in the Workflow** (see "Receptionist tasks on patient departure" on page 34)
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- **Processing Custom Tasks** (see "Processing Custom Tasks from Departure" on page 54)
- **Workflow Compliance Report** (see "The Appointment Workflow Compliance Report" on page 54)
Configuring
(set up and customising)

**Configuration** (see "Configuring Appointment Workflow" on page 56)

**Workflow Wizard** (see "Accessing the Appointment Workflow Wizard" on page 57)

**Departure Details** (see "Configuring the Departure List" on page 58)

**Planned Treatments** (see "Configuring Planned Treatment Appointment" on page 59)

**Improve performance** (see "Improving system performance via Departure List options" on page 64)

**Recalls** (see "Configuring Recall Appointments" on page 65)

**Payments** (see "Configuring Payment Processing" on page 66)

**Contact Details** (see "Configuring Contact Details" on page 68)

**Custom tasks** (see "Configuring Custom departure tasks" on page 70)

**Disable Departure Task List** (see "Disabling the Departure Task List for a User" on page 75)

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**Resources**

- **Overview and Configuration**

- **Receptionist procedures**

- **Clinical procedures**

- **User Guide**

- **Training Competencies Checklist**
Overview of Appointment Workflow

Purpose of Appointment Workflow

Continuous oral health in a cycle of treatment

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

Planned Treatment example:

Current patients are a primary market

Current patients comprise a productive target market for reselling services because

- the practice already has a relatively intimate relationship with them based on a degree of trust,
- the sales cycle for reselling is exceptionally short, and
- the effort to prospect for further business from existing patients is minimal.

Retaining patients by means of automated workflow

The Appointment Workflow facility enables a practice to

- retain patients for further oral health work by ensuring that they always have future appointments booked,
- automate the practice workflow for retaining patients,
- define and integrate the required Provider (Dentist, Hygienist) and Receptionist tasks within the workflow,
- track participant compliance in the workflow and produce compliance reports,
- continuously improve workflow by viewing and acting on relevant compliance report statistics.

Arrival Tasks List

When Receptionists go to register a patient as "arrived" an Arrival Tasks List displays outstanding procedures and reminders for that patient:

Departure Tasks List

Receptionists use a Departure Task List on the Main screen:
This tasks list is configured by means of an Appointment Workflow Wizard that specifies required departure tasks that the Receptionist must carry out.

**Prompting for custom options**

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

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

**Features of Appointment Workflow**

**Free**

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

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

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

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

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

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

**Manually reset the patient’s status in the appointment workflow**

It is possible to *manually reset or change* a patient’s appointment workflow status to either

- ✉️ **Booked** (not yet in the workflow)
- ⬣ **Arrived** (has been processed through reception and is now awaiting clinical treatment)
- ✈️ **In the Chair** (being treated in the Clinic - only the assigned Provider can change patient to this status)
- ☑️ **Complete** (has been treated and is now in reception being processed through departure)
- ✔️ **Checked Out** (completed the workflow)

See *Resetting and Editing Appointment Status* (on page 17)
Easy to vary the aggressiveness of the patient resell and retention strategy

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

Automated prompts

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

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

Workflow auditing

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

Workflow reporting

The Appointment Workflow Compliance Report (see "Generating the Appointment Workflow Compliance Report" on page 19) provides valuable analysis of Appointment Workflow success, and identifies instances where there was a failure to complete the Appointment Workflow. The report can be scheduled, exported to .CSV format, and it can be set as a favourite for quick access.

Custom tasks

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

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

Departure Task List on the Main screen

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

For example, here the Receptionist is viewing a task to issue a brochure:
Optionally hide the Departure Task List per User

Clinicians or other users who have no need to view the Departure Task List in their view of the Main (Appointment) book can opt to disable this sidebar based on their User Settings.

**Departure Task List enabled**

**Departure Task List disabled**

(See *Disabling the Departure Task List for a User* (on page 75))

**Benefits of Appointment Workflow**

**Free**

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

**Increase income**

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

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

**Automation saves time**

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

**Quick information capture for busy Receptionists**
The software enables quick information capture without the need to manually open patient records. For example:

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

Commit patients to long term oral health

Optimise patients’ oral health by effectively committing them to ongoing treatment.

Systematic standard procedure for departure

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

Measurement enables continuous improvement

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

All workflow tasks are audited per participant, and by means of a compliance report (see "Generating the Appointment Workflow Compliance Report" on page 19), you can track participant compliance to the workflow. This objective measure can be used for multiple purposes including performance improvement, reason or evidence for disciplinary action, identification of training needs, and identification of operational bottlenecks.

Flexibly optimise the departure process

Because the configuration wizard allows for custom options, you have the flexibility to creatively optimise the departure workflow.

Receptionist does not need to leave the Main screen

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

Use as a training aid for new staff

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

Family Appointment tasks

In both the Arrival Task List and the Departure Task List, members for a family appointment are listed individually, with outstanding issues listed per individual. This provides an effective means of covering all bases for all members of a family passing through the practice.

Requirements for Appointment Workflow

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

Software version

EXACT version 10.16 or later.

The Arrival Tasks List (see "Using the Arrival Tasks List" on page 21) is available from version 11.3SP1.

The planned treatment online booking (see "Configuring online booking of planned treatment" on page 61) integration is available from v11.3 SP3.
Users must understand the actions required by Receptionist and Provider

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

If the Receptionist fails to accept the patient into the workflow, EXACT does not know that the patient is being processed, so further Appointment Workflow functions are not possible.

A patient can only be moved to the chair by the Provider to whom that patient has been assigned in the appointment book (not by the Receptionist, nor by another Provider).

If the Provider fails to move the patient to the chair (in the software), EXACT understands the patient to still be waiting in Reception, and software functions such as Charging and Move to Departure are consequently not possible.

Configuration

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

  ![Configuration](image)

- Within Appointment Books you also need to Enable Appointment Workflow (shown above), as this is disabled by default (by default there is therefore no Departure List).
- The Appointment Workflow must be correctly configured by means of an Appointment Workflow Wizard before it becomes operational in the Provider workflow and will appear as a Departure task list (see "Managing the Departure Task List" on page 41) on the Main screen.
- The Departure Task List has a feature where the first available appropriate appointment (that meets the requirements specified by the Provider) is automatically listed for the departing patient. If this function proves to be software resource-intensive there is an option to replace it with a simpler Search link. See Configuring Planned Treatment Appointment (on page 59).
- EXACT will automatically prompt the Receptionist to Collect Mobile number if a patient has the SMS Mobile field un-checked in the Patient File. To reduce such prompts, practitioners who record patient details should always check (tick) this box. See Also: Reducing automated "Collect Mobile" prompts (on page 39)

Requirements for planned treatment online appointment booking integration

To use the planned treatment online booking integration all requirements will need to have been met for online appointment booking (see Requirements of Online Appointment Bookings), and the practice will need to have been configured for planned treatment online booking (see Configuring Planned Treatment online booking)

**IMPORTANT:** What you can see and do in the software interface depends on your role within the workflow and your access rights in the system. So if you try to click a button to perform an action and nothing happens, it may be because 1) you have the wrong role for performing that action, or 2) you don’t have rights to perform it. For example, a Dentist can see the patient retention Departure Task List on the Main screen, but cannot perform these tasks because as per the configuration, they are handled only by the Receptionist role.
Using Appointment Workflow

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

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

- Receptionist tasks:
  - *Receptionist tasks in the Appointment Workflow* (see "Receptionist tasks on patient departure" on page 34)
  - Receptionist procedures
    http://portal.softwareofexcellence.com/video/appointment-workflow-receptionist-exact-v113
- Provider tasks:
  - *Provider tasks in the Appointment Workflow* (on page 22)
  - Provider procedures
    http://portal.softwareofexcellence.com/video/appointment-workflow-clinical-exact-v113

Once a history of actions is established, the *Appointment Workflow Compliance Report* (see "Generating the Appointment Workflow Compliance Report" on page 19) can be used to determine the degree of compliance to the defined tasks, and ultimately may be a useful tool in continuously improving the Appointment Workflow effort.

**IMPORTANT:** What you can see and do in the software interface depends on your role within the workflow and your access rights in the system. So if you try to click a button to perform an action and nothing happens, it may be because 1) you have the wrong role for performing that action, or 2) you don't have rights to perform it. For example, a Dentist can see the patient retention Departure Task List on the Main screen, but cannot perform these tasks because as per the configuration, they are handled only by the Receptionist role.

Clinical workflow (IMPORTANT to understand!)

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

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

![Workflow Diagram]

To (optionally) manually advance patients to different stages in the workflow

Right-click the patient appointment and select a workflow option from the right-click menu:
**CAUTION:** EXACT will track the patient as if they *really are* at that stage and expect the actions from that stage. For example, if you Move Patient to Chair EXACT will expect that the patient is currently being treated in the clinic and will not show the departure task list for that patient.

See also *Resetting and Editing Appointment Status* (on page 17)

**Practitioner Tasks and Cautions per stage**

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

<table>
<thead>
<tr>
<th>Stage</th>
<th>Practitioner Tasks</th>
<th>Cautions at each stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient arrives in reception</td>
<td>Appointment Book shows booking: Kees Vries</td>
<td>If the Receptionist fails to accept the patient into the workflow, EXACT does not know that the patient is being processed, so further Appointment Workflow functions are not possible.</td>
</tr>
<tr>
<td>Patient provides information</td>
<td>The Arrivals Tasks List displays: Kees Vries</td>
<td>The patient is only formally registered as &quot;arrived&quot; on completion of the Arrival Tasks List. Without this step EXACT does not know that the patient is being processed. Once &quot;arrived&quot;, the Provider sees an icon of the waiting patient in the Patients screen. This icon goes through successive states (indicating increasing impatience) as the patient waits to be seen.</td>
</tr>
</tbody>
</table>
Patient is moved to chair by Provider and treated by Provider

Provider notices waiting patient symbol. When ready, the assigned Provider (in the appointment book) clicks to move patient to chair (see "Moving the patient to the Chair" on page 23). Resulting symbol:

👩 Kees Vries

EXACT then enables the Provider tasks. Provider is then able to perform tasks (see "Provider tasks in the Appointment workflow" on page 22): Specify the treatment appointments (see "Specifying Planned Treatment Appointments for Departure" on page 30) or recalls (see "Specifying Recall Appointments for Departure" on page 32) required.

Then Provider moves patient to Departure (see "Moving the patient to Departure" on page 28) (in the software by means of the Charge or TC button). Resulting symbol:

🍃 Kees Vries

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

If that particular Provider fails to move the patient to the chair (in the software), EXACT understands the patient to still be waiting in Reception, and software functions such as Charging and Move to Departure are consequently not possible.

Patient departs through reception

This causes the Departure Task List (see "Managing the Departure Task List" on page 41) to appear in the Main tab (MultiColumn Appointment book only), with tasks based on Appointment Workflow configuration and Provider specifications.

Receptionist tasks (see "Receptionist tasks on patient departure " on page 34): Receptionist processes departure tasks and finalises. Resulting symbol:

✅ Kees Vries

The patient’s details will not show in the Departure Task List, and the Receptionist will not be able to process via the Departure Task List if

The patient was not moved to the chair in EXACT software,
- and / or -
The patient was not moved to Departure in EXACT software.

Audit Trail and Report

Provider and Receptionist actions are tracked by the system, and an Appointment Workflow Compliance Report (see "Generating the Appointment Workflow Compliance Report" on page 19) shows their degree of compliance to the workflow.

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

Requires EXACT v12.2 or later.

It is possible to *manually reset or change* a patient’s appointment workflow status to either

- □ Booked (not yet in the workflow)
- ✔ Arrived (has been processed through reception and is now awaiting clinical treatment)
- 🏡 In the Chair (being treated in the Clinic - only the assigned Provider can change the patient to this status)
- ☑ Complete (has been treated and is now in reception being processed through departure)
- ✔️ Checked Out (completed the workflow)

**To reset the patient appointment status**

Right-click the appointment and select the reset status from the context menu:

*(the options may vary depending on stages in the workflow and permissions)*

![Appointment Workflow Context Menu](image)

**IMPORTANT:** When you reset the appointment status EXACT resets its expectation of where that patient is in the practice and what actions are applicable to that patient’s current stage of the workflow.

Select **Reset Appointment Status** to set the patient to Booked.

You’ll see the status icon in the appointment change: □ Booked

EXACT expects that this patient has not yet arrived in reception.

Select **Mark as Booked** to set the patient to Booked.

You’ll see the status icon in the appointment change: □ Booked

EXACT expects that this patient has not yet arrived in reception.

Select **Mark as Arrived** to set the patient to awaiting treatment in the clinic.

You’ll see the status icon in the appointment change: ✔ Arrived

EXACT expects that this patient has been through the Arrivals process and is queued, awaiting treatment by the Provider.
The Provider sees this patient as a queued icon, waiting for treatment.

(valid Provider only) Select **Move Patient to Chair** to accept the patient into the clinic:

> A patient can only be moved to the chair by the Provider to whom that patient has been assigned in the appointment book, so only that Provider will see this option to Move to Chair.

You’ll see the status icon in the appointment change: ⬅️ **In the chair**

**EXACT** expects that this patient is in the chair being treated by the Provider.

Select **Mark as Complete** to mark the clinical treatment phase as complete for this patient.

You’ll see the status icon in the appointment change: ✅ **Complete**

**EXACT** expects that this patient has been treated and moved to Reception, and pops up the patients Departure Task List, where applicable.

Select **Mark as Checked Out** to mark the reception departure phase as complete for this patient.

You’ll see the status icon in the appointment change: ✅ **Checked out**

**EXACT** expects that this patient has been processed through departure and left the practice.

### The Appointment Workflow Compliance Report

**Generate** (see "Generating the Appointment Workflow Compliance Report" on page 19) and **interpret** (see "Interpreting the Appointment Workflow Compliance Report" on page 20) this report to track statistics on how well your practice has kept to the configured Appointment Workflow.

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

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

**Report requirements**

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

**Report features**

It can be

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

To generate the Appointment Workflow Compliance Report

1. Select Administration > Reports

2. Select Appointment Workflow Compliance from the list of reports:

After a few seconds the report configuration screen displays:

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

Report format:
Interpreting the Appointment Workflow Compliance Report

Report logic

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

Failure to comply is reported where patients did not complete departure actions *on that day*.

The number of reported action items depends on

- The practice setup in the configuration wizard and the items that were *required to be completed* per patient.
- From EXACT v11.3 SP3 the report includes figures for planned treatment online appointment booking. This is where a patient will not or cannot book further planned treatment while departing through reception, so the Receptionist issues a web page address for later patient online self-booking. Such planned treatment cases are technically "failures" to secure the booking in reception. An entry of "OLB Link Sent" displays against the failure for that Patient, along with the Total Count of "OLB Links Sent" which displays in the header of the report.
- The remaining options are Mobile Number not Collected, Email Address not Collected and Custom Option not Completed.

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

Report layout

The Report Summary area:

<table>
<thead>
<tr>
<th>Details of failed workflows</th>
</tr>
</thead>
<tbody>
<tr>
<td>25/05/12 10:30m No John Ward Faeil</td>
</tr>
<tr>
<td>25/05/12 10:30m No John Ward Faeil</td>
</tr>
</tbody>
</table>

The percentage column is most telling.

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

- In 67% of the 6 Total appointments the Receptionist failed to meet the Custom tasks required.

The Details of Failed Workflows area:

- Each line represents an appointment with a failed workflow.
- The columns depend on configured parameters.

**Using the Arrival Tasks List**

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

**To accept patients via the Arrival screen**

1. When the patient (or family) arrives, accept them into the practice by clicking the check box in the Appointment Book.
2. The Arrival screen displays for the patient (or family).
3. If not using Clinipad, simply click the **Arrive** button. A ‘stick figure’ will display in the appointment book to indicate the patient has arrived for their appointment.
4. If you intend to use Clinipad, see below for an explanation of the tasks that can be performed from this Arrival screen.
5. When you have prepared the screen options for Clinipad, click the **Arrive and send to Clinipad** button. A ‘stick figure’ will display in the appointment book to indicate the patient has arrived for their appointment.

**Appointment Workflow compliance:**

The Appointment Workflow software monitors task completion or failure to complete, and reports in the **Appointment Workflow. Compliance Report** (see "*The Appointment Workflow Compliance Report*" on page 18).

**The Appointment Workflow objective:** For Appointment Workflow purposes, the Receptionist’s objective is to successfully complete all Arrival and Departure tasks.
Provider tasks in the Appointment workflow

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

<table>
<thead>
<tr>
<th>Provider Task in Appointment Workflow:</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move a waiting patient to the Chair</td>
<td><em>Moving the patient to the Chair</em> (on page 23)</td>
</tr>
<tr>
<td>Move waiting patients to Departure. This will advance the patient to the Receptionist within the workflow and call up the Departure List</td>
<td><em>Moving the patient to Departure</em> (on page 28)</td>
</tr>
<tr>
<td>Specify the parameters for the Receptionist to schedule Treatment appointments</td>
<td><em>Specifying Treatment Appointments for Departure</em> (see &quot;<em>Specifying Planned Treatment Appointments for Departure</em>&quot; on page 30)</td>
</tr>
<tr>
<td>Specifying the parameters for the receptionist to be able to issue departing patients with a web address for self-booking of planned treatments</td>
<td><em>Specifying Planned Treatment Online Booking</em> (see &quot;<em>Facilitating patient online booking of planned treatment</em>&quot; on page 47)</td>
</tr>
<tr>
<td>Specify the parameters for the receptionist to schedule Recall appointments</td>
<td><em>Specifying Recall Appointments for Departure</em> (on page 32)</td>
</tr>
</tbody>
</table>

**Related Provider Tasks:**

<table>
<thead>
<tr>
<th>Related Provider Tasks:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Oral Health Surveys created in Reception.</td>
<td>Review with the patient</td>
</tr>
<tr>
<td>Use Clinipad to create Oral Health Surveys, if this hasn’t been done in Reception already</td>
<td>Creating a new Oral Health Survey from the Clinic</td>
</tr>
<tr>
<td>Create Estimates in Clinipad</td>
<td>Clinipad Signed Estimates</td>
</tr>
</tbody>
</table>

**SEE ALSO:**  ■ *Clinical procedures*


**IMPORTANT:** What you can see and do in the software interface depends on your role within the workflow and your access rights in the system. So if you try to click a button to perform an action and nothing happens, it may be because 1) you have the wrong role for performing that action, or 2) you don’t have rights to perform it. For example, a Dentist can see the patient retention Departure Task List on the Main screen, but cannot perform these tasks because as per the configuration, they are handled only by the Receptionist role.
Checking patient details before appointment

Any 'stick figure' patients at the door represent patients who are waiting:

To quickly check appointment details on waiting patients

Moving the patient to the Chair

**IMPORTANT:**
- A patient can only be moved to the chair by the Provider to whom that patient has been assigned in the appointment book.
- EXACT must be informed at which stage the patient is within the workflow by means of the patient status: Arrival - In the Chair - Departure.

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

For example, if the Provider does not register an arrived patient as moved to the chair (in the software), EXACT understands the patient to be sitting in the reception area, so the Provider is then unable to Charge the patient, and the Receptionist is unable to process the patient departure.

To move a patient to the Chair for treatment

1. Double-click the 'Arrivals Door' icon: in the toolbar:

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

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

- This window closes and the patient appears as selected in the user interface.
- If configured as an option (Open Medical History on 'Move to Chair'), the Medical History (tooltip) appears automatically.
- The animated figures on the toolbar now display a stick person in a dental chair, to the left of the Arrivals Door:

  ![Animation of stick person in dental chair]

- In the Patient Preview window, the stick figure icon changes to a stick person in a dental chair:

  ![Patient Preview window with stick person in chair]

- In the Receptionist Appointment Book on the Main screen, the patient booking displays the chair:

  ![Receptionist Appointment Book with patient in chair]

- The stick person in the chair represents the patient in your chair and any stick people remaining at the door represent patients who are still waiting:

  ![Patients remaining at door]

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

### Reviewing Medical History

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:

- **Nurse or Provider**, from a read-only Medical History Form
- **Provider**, from an updated or a new Medical History Form

### 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:

![Audit record of the Review](image)

---

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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:
Clinipad:

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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]:
   
<table>
<thead>
<tr>
<th>Heart</th>
<th>Chest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rheumatic Fever</td>
<td>Heart Murmur</td>
</tr>
<tr>
<td>High Blood Pressure</td>
<td>Angina</td>
</tr>
<tr>
<td>Heart Surgery</td>
<td>Thrombosis</td>
</tr>
<tr>
<td>Pacemaker fitted</td>
<td></td>
</tr>
</tbody>
</table>

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

Moving the patient to Departure

**IMPORTANT:** EXACT must be informed at which stage the patient is within the workflow by means of the patient status: Arrived - In the Chair - Departure.

All software procedures are based on these stages, so failure to "inform" EXACT of the stage will inhibit the possible tasks for the following stages.
For example, if the Provider does not register an arrived patient as moved to the chair (in the software), EXACT understands the patient to be sitting in the reception area, so the Provider is then unable to Charge the patient, and the Receptionist is unable to process the patient departure.

After treating the patient, Providers need to start the Departure process to trigger the final phase of the Appointment Workflow and enable the receptionist to complete the **Departure Task List**:

![Diagram showing the Appointment Workflow](image)

**To move a patient to Departure**

1. **Start** the Departure process by either of these means:
   - Double-click an Appointment to open the Edit Appointment window in which to **Specify Treatment Appointments for Departure** (see "Specifying Planned Treatment Appointments for Departure" on page 30).
   - or -
   Select a treatment or appointment and click the Charge or TC button. You will be prompted "Should the patient’s appointment be marked as "Complete"?". Select Yes. This will change the icon on the Appointment Book from a patient on a chair to a HAND.

2. Follow the prompts for processing the departure. These may include:
   - The **Appointment Workflow window** (see "Specifying Planned Treatment Appointments for Departure" on page 30), in which to specify future appointments, or
   - The **Set Recalls window** (see "Specifying Recall Appointments for Departure" on page 32), if there are no planned treatments.

3. When you complete the move to Departure, the **Departure List** (see "Managing the Departure Task List" on page 41) appears in the Main screen. The Receptionist deals with the listed tasks (see "Receptionist tasks on patient departure" on page 34) to complete the workflow.
Specifying Planned Treatment Appointments for Departure

In this procedure Receptionists secure confirmed planned treatment bookings while the patient is being processed through departure.

An alternative is Specifying Planned Treatment Online Booking (see "Facilitating patient online booking of planned treatment" on page 47), where patients who cannot or will not commit to bookings are issued a web site address for self-booking online.

Configuration required

The options for specifying treatment appointments are set in a software configuration area. See Configuring Planned Treatment Appointment (on page 59).

Overview

With the patient in the chair, Providers set guidelines for the future planned treatment appointments that they want for the patient.

When the patient moves through to Reception to depart the practice, the Receptionist is prompted in the Departure List to schedule these planned treatment appointments, following the Provider's guidelines.

How Providers specify what they want for Patient planned treatment appointments

Appointment planning starts with the Provider control of the Planning area in the Chart tab:

Once the Provider moves the patient to Departure (see "Moving the patient to Departure" on page 28), the Provider will be prompted by means of the Appointment Workflow window to specify appointment details for the incomplete appointments:

- Check if you want the Receptionist to Book this appointment.
- Type an Expected Time that the appointment will take.
- Either accept the default or specify a Booking Interval - a minimum period before the appointment.
- Type any additional Notes as an explanation for the Receptionist.

How the Receptionist sees these specified details

These details will then display in the Departure List (see "Managing the Departure Task List" on page 41) in the
Main screen, and will be used by the Receptionist in scheduling the appointment.

Notice how the completed fields propagate through to the Departure List in this example:

![Departure List Example](image)

How the Receptionist schedules these planned treatment appointments

See *Scheduling Planned Appointments from Departure* (see "Scheduling Planned Treatment Appointments from Departure" on page 46)

Option for the Provider to print the Invoice

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

![Invoice Printing Example](image)

Note that it has a *Preview* facility for viewing online before printing.

Enabling patient online booking of planned treatment

Ideally Receptionists secure bookings from patients when the patients depart Reception. However, this is not always possible, and an alternative is to empower the patients to later self-book online.

Receptionists may be prompted in the Departure Task List to issue patients with a web address for later patient self-booking of planned treatment appointments, if Providers meet certain requirements to make this work.

**To meet Provider requirements for patient planned treatment online booking**

- The practice must have *Appointment Workflow configured* because a Planned Treatment Online Booking link can only be sent from its Departure Task List at the point of Patient checkout. There is no other way to send it.
- A Patient requires an Appointment for Today’s Date.
- The Patient requires a Treatment Plan on the Chart Tab, and a minimum of one appointment *Planned*, with time specified for the Service.

- Only Patient planned appointments on the Chart Tab that are marked as *To Be Booked* will show in the Departure Task List, so Providers must know to tick this checkbox. They must also ensure that the planned
treatment has an estimated time (duration). EXACT calculates the sum of the planned services per appointment, and this displays in the Edit Appointment screen Expected Time field:

- When charting, the Provider needs to specify to **Book this Appointment**:

  A) Double-click the Appointment to open the Edit Appointment window.
  B) Check (tick) the **Book this Appointment** checkbox and complete all other details in the screen.
  C) Check that the appointment has an **Expected Time** (duration), calculated automatically as the sum of the services' Estimated Times.
  D) Click **OK**.

**Specifying Recall Appointments for Departure**

**Configuration required**

The options for specifying recall appointments are set in a software configuration area. See *Configuring Recall Appointments* (on page 65).

**Overview**

If a Provider does not plan future treatments for a patient in the chair, the software can prompt for details of recall appointments instead. The Provider specifies details, which appear as a recall booking prompt on the Receptionist's Departure Task List. i.e. instead of booking planned treatments, the Receptionist books recall appointments.

**How Providers specify what they want for patient recall appointments**

With the patient in the chair, if the Provider does not plan future **planned treatment appointments** for the patient, when he/she **moves the patient to Departure** (see "Moving the patient to Departure" on page 28), the software can automatically display a Set Recalls screen, which the Provider is prompted to complete.
How the Receptionist sees these specified details

When the patient moves through to Reception to depart the practice, the Receptionist is prompted in the Departure List to schedule these recall appointments, following the Provider's guidelines.

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

How the Receptionist schedules these recall appointments

See *Scheduling Recall appointments from Departure* (on page 53)
### Receptionist tasks on patient departure

(SEE ALSO: Receptionist procedures

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

### Tasks overview

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

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

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

The Appointment Workflow software monitors task completion or failure to complete, and reports in the Appointment Workflow Compliance Report (see "The Appointment Workflow Compliance Report" on page 18).

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

### Receptionist tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept the patient into the practice reception by clicking the check box in the Appointment Book. This pops up the Arrivals Tasks List for processing.</td>
<td>- Using the Arrival Tasks List (on page 21)</td>
</tr>
<tr>
<td>When Arrival tasks are completed, a ‘stick figure’ displays in the Appointment book to indicate the patient has arrived for their appointment.</td>
<td>- Using Clinipad with Patient arrival</td>
</tr>
<tr>
<td>- Clinipad Oral Health Surveys normal workflow</td>
<td></td>
</tr>
</tbody>
</table>

*When the patient is departing, in the Departure Task List:*

<p>| Monitor and manage the Departure List in the Main screen Multiday Appointment Book. | Managing the Departure List (see &quot;Managing the Departure Task List&quot; on page 41) |
| Schedule Appointments for the treatments planned and specified by a Provider. | Scheduling Appointments in Appointment Workflow (see &quot;Scheduling Planned Treatment Appointments from Departure&quot; on page 46) |</p>
<table>
<thead>
<tr>
<th><strong>Schedule recalls / appointments</strong> for a patient who has no further planned treatments. These recalls would typically be either further services such as bleaching, or a future oral examination.</th>
<th><strong>Scheduling Recalls in Appointment Workflow</strong> (see &quot;Scheduling Recall appointments from Departure&quot; on page 53)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Facilitate patient booking of planned treatment appointments online</strong> by sending them an SMS and/or Email with a link to a web address whose page is pre-populated with the treatment details.</td>
<td><strong>Facilitating patient online booking of planned treatment</strong> (on page 47)</td>
</tr>
<tr>
<td><strong>Process Payments</strong>. These payments by default include all invoiced payments, but depending on the configuration, they may include completed treatments or planned treatments that haven't yet been invoiced.</td>
<td><strong>Processing Payments in Appointment Workflow</strong> (see &quot;Processing Payments from Departure&quot; on page 55)</td>
</tr>
<tr>
<td><strong>Record patient details</strong> (Email address, Mobile Phone) if they haven't yet been recorded.</td>
<td><strong>Recording Patient Details in Appointment Workflow</strong> (see &quot;Recording Patient Details from Departure&quot; on page 55)</td>
</tr>
<tr>
<td><strong>Custom task</strong>. This may be any kind of task prompt that has been configured for the practice.</td>
<td><strong>Processing Custom Tasks in Appointment Workflow</strong> (see &quot;Processing Custom Tasks from Departure&quot; on page 54)</td>
</tr>
</tbody>
</table>

**SEE ALSO:**  
Receptionist procedures  
http://portal.softwareofexcellence.com/video/appointment-workflow-receptionist-exact-v113
Using the Departure Task List

Quick Reference:

Dentist Recall:

Hygienist Recall:

Co-duty Recall:

IMPORTANT: The "1st Available gap" display is resource-intensive, so if your system struggles to cope, this function may be disabled in the configuration. When disabled, you will see only a simple appointment Search rather than the 1st Available Appointment details:

See Improving system performance via Departure List options (on page 64) for options on disabling the 1st Available Gap function.

NOTE: If an appointment listed in the Departure Task List becomes deleted, invalid or completed before the Departure Task List is closed, when you attempt to drag it to the appointment book you will see a message 'The corresponding planned treatment on the patient’s chart tab has either been completed or no longer exists. Do you still wish to book this appointment?' Click YES to still book the appointment and link it to the Chart tab. Click NO to not book the appointment and to remove this appointment entry from the Departure Task List.

See also:

Further abbreviated procedures listed below, and see also:
Marking an appointment as Completed (on page 42)
Adding Departure List appointments to the Short Notice List (see "Adding Departure List appointments to Short Notice List (v11.3)" on page 45)
Scheduling Appointments from the Departure Task List (see "Scheduling Planned Treatment Appointments from Departure" on page 46)
Facilitating patient online booking of planned treatment (on page 47)
Scheduling Recalls from the Departure Task List (see "Scheduling Recall appointments from Departure" on page 53)
Processing Payments from the Departure Task List (see "Processing Payments from Departure" on page 55)
Recording Patient Details from the Departure Task List (see "Recording Patient Details from Departure" on page 55)
Processing Custom Tasks from the Departure Task List (see "Processing Custom Tasks from Departure" on page 54)
Improving system performance via Departure List options (on page 64)

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

To mark this appointment as complete
Click the Exit button.
This will trigger a compulsory window for you to type the reason for marking this Appointment Complete. For consequences and a detailed procedure see Marking an appointment as Completed (on page 42).

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

To view a treatment summary tooltip
Hover your mouse cursor over the appointment hyperlink:

To edit an appointment in the Edit Appointment window
Click the Appointment hyperlink to open the Edit Appointment window:
**To assign an appointment to the Appointment Book**

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

![Appointment Book Image]

**NOTE:** If an appointment listed in the Departure Task List becomes deleted, invalid or completed before the Departure Task List is closed, when you attempt to drag it to the appointment book you will see a message: 'The corresponding planned treatment on the patient’s chart tab has either been completed or no longer exists. Do you still wish to book this appointment?' Click YES to still book the appointment and link it to the Chart tab. Click NO to not book the appointment and to remove this appointment entry from the Departure Task List.

**To open an Appointment Search window**

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

![Appointment Search Window Image]

**To open the first available appointment slot in the Appointment Book**

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

To send a web address to the patient for self-booking online

1. Click the online bookings button to open the Send Online Booking Link by SMS/Email window:

![Send Online Booking Link by SMS/Email](image)

2. Check (tick) the SMS and / or Email checkboxes and then click Send.
3. For more detail, including tracking the online booking, see *Facilitating patient online booking of planned treatment* (on page 47).

Reducing automated "Collect Mobile" prompts

The "Collect Mobile" prompt:

Depending on configuration, EXACT may populate the Departure Task List with a prompt to ask for Mobile number:

![Collect Mobile](image)

Configuration that determines Collect Mobile prompt:

EXACT looks to two places for guidelines on prompting for Mobile numbers:

1. The Patient Retention Workflow Wizard

This configuration applies to all patients (whether to prompt for Mobile number, and whether to prompt only a certain age range for Mobile number).

2. The Patient File

This is to determine if a departing patient has a Mobile number registered with the dental practice, with that number checked (ticked) for SMS messaging: 

![SMS Mobile](image)
This checkbox can be edited in the same manner in the Patient File and in the Contact Details dialogue.

<table>
<thead>
<tr>
<th>Mobile</th>
<th>021 220 3121</th>
<th>□ SMS Mobile</th>
<th>EXACT will prompt to Collect Mobile number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile</td>
<td></td>
<td>□ SMS Mobile</td>
<td>EXACT will prompt to Collect Mobile number</td>
</tr>
<tr>
<td>Mobile</td>
<td>021 220 3121</td>
<td>□ SMS Mobile</td>
<td>EXACT will not prompt to Collect Mobile number</td>
</tr>
</tbody>
</table>

**To reduce automated "Collect Mobile" prompts in the Departure Task List**

In the Contact Details dialogue:

Click the Prompt in 12 months button:

![Contact Details Dialogue](image)

In the Patient Retention Workflow Wizard:
Managing the Departure Task List

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

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

Each departure task is displayed in blue text.

By default the tasks can only be completed by a logged in Receptionist user. All actions are tracked, audited, and reported in the Appointment Workflow Compliance Report (on page 18), which identifies and tallies failed actions.

Try to avoid accumulating patients in the Departure List

If you do not clear the list fast enough, you may have multiple patients displaying in the list:

- Paul Balomi
  - Collect Email & Mobile
  - Take payment: $913.58
  - Special Offers

- Julie Wilson
  - Book 60min DEMO - S4M,SED-N2...
  - Thu 27th Jun 08.00
  - Collect Email & Mobile
  - Take payment: $30.00
  - Special Offers
Booking Intervals and "1st available" time slots

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

![Departure List Example]

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

See:

- *Using the Departure Task List* (on page 36)

Departure tasks:

- *Marking an appointment as Completed* (on page 42)
- *Scheduling Appointments from the Departure Task List* (see "Scheduling Planned Treatment Appointments from Departure" on page 46)
- *Facilitating patient online booking of planned treatment* (on page 47)
- *Scheduling Recalls from the Departure Task List* (see "Scheduling Recall appointments from Departure" on page 53)
- *Processing Payments from the Departure Task List* (see "Processing Payments from Departure" on page 55)
- *Recording Patient Details from the Departure Task List* (see "Recording Patient Details from Departure" on page 55)
- *Processing Custom Tasks from the Departure Task List* (see "Processing Custom Tasks from Departure" on page 54)

Marking an appointment as Completed

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

**Be aware of these points:**

- This removes the Departure List for that appointment.
- Any incomplete tasks will be reported as such in the *Appointment Workflow Compliance Report* (see "The Appointment Workflow Compliance Report" on page 18).
- This report functions per day, so even if you complete the outstanding tasks the following day or later, they will still be reported as incomplete.
- You have the option to move any outstanding appointment bookings for that patient to the Follow Up area, to be completed at a later specified date / time. If you can postpone to later in the same day, and then complete
the task, it will still be audited as a successful completion.

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

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

   ![Checkbox Example](image1.png)

   - or -

   Click the hand icon in the appointment book:

   ![Hand Icon Example](image2.png)

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

   ![Departure Check List](image3.png)

2. As a minimum you need to select one of the options to enable the Continue button.
   Note that the option you choose will reflect in the *The Appointment Workflow Compliance Report* (on page 18) as a failure to complete the workflow.

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

   ![Options Menu](image4.png)

   - **Prompt**: With this configured, EXACT will prompt you with a popup window, by means of which you can specify a Follow up date and a Follow up List to which to add the patient:

   ![Prompt Example](image5.png)

   **To select a follow up date:**
To select a Follow up List:

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

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

**Tip:** The auditing of task completion works per day, so if you can postpone the task until later in the same day, and then complete it, it will still be audited as a completed task.

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

In the Appointment book, the patient appointment will be shown as completed:

**One failure reason for multiple appointments on one day**

(Appplies from from v11.3 SP7)

If a patient has two appointments on the same day and fails to complete the first, EXACT assumes that the same appointment workflow failure reason applies to both.

EXACT displays these appointments as one item on the appointment workflow departure task list, and prompts for a single failure reason.

For example:

Master A.A. has an appointment with a Dentist, followed by a Hygienist, as indicated in the purple-shaded blocks.
below. His mother phones in to say that he is ill. When the Receptionist 'Completes' the dentist appointment with no treatment having occurred, EXACT also auto-completes the hygienist appointment and packages both as a single departure event:

Adding Departure List appointments to Short Notice List (v11.3)

To add an appointment to the Short Notice List directly from the Departure List

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

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

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

**Scheduling Planned Treatment Appointments from Departure**

**Overview**

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

(See [Specifying Planned Treatment Appointments for Departure](#) (on page 30))

As Receptionist, your responsibility is to schedule the appointments.

**Be aware of these points:**

- You need to consult with the patient.
- The software caters automatically to any specified booking interval (for example, a Dentist may specify a period of at least 7 days before the next appointment).
- **EXACT** audits all actions *per day*, so your appointment scheduling should be completed on the same day or the software will record it as a failed action in the **Appointment Workflow Compliance Report** (see "**The Appointment Workflow Compliance Report**" on page 18). If you are forced to postpone your appointment scheduling for a patient, then
  - You have the option to Follow Up, for which it would be ideal to follow up later in the same day so that the scheduling action is still recorded as a successful action in the report.
  - You have the option to type a Reason for the postponement, and this reason will appear in the report.

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

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

**To schedule an appointment - Edit option**

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

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

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

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

To schedule an appointment - First available time option

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

2. Drag the First available time hyperlink into that time in the Appointment Book, or into any other suitable gap in the Appointment Book.

Facilitating patient online booking of planned treatment

Ideally Receptionists secure bookings from patients when the patients depart Reception (Specifying Planned Treatment Appointments for Departure (on page 30)). However, this is not always possible, and an alternative is to empower the patients to later self-book online.

From v11.3 SP3 Receptionists may be prompted in the Departure Task List to issue patients with a web address for later patient self-booking of planned treatment appointments.

This is only possible if these conditions are met:
• All requirements for online appointment bookings are met (see Requirements of Online Appointment Bookings)
• Planned treatment online appointment booking has been configured (see Configuring Planned Treatment online booking)
• Providers perform their role in enabling the planned treatment online booking while the patient is in the chair (see Provider tasks in Using Planned Treatment online booking)

Re-send the patient Online Booking Link

This applies to Planned Treatment/Single Patient URL from EXACT v12.1 and later.
Once the online booking link has been sent from the Appointment Workflow departure task list, it is also made available from the Follow Up tab, for re-sending the link to the patient as a reminder.

To re-send the patient Online Booking Link after initial sending from the Appointment Workflow
1. Select the patient in the Follow Up tab and select the Send Online Booking Link by SMS/Email button.
2. Select the SMS or Email option and click Send.
3. You can view the contact via the patient file Contacts tab.

To specify planned treatment online booking for departing patients
1. When the patient departs through reception the Receptionist attempts to book the planned treatment appointment manually in the appointment book.
   If the patient cannot or will not commit to a booking, the Receptionist opts to send the planned treatment booking URL...
2. If the patient has no Email and/or SMS contacts recorded, the Receptionist will first need to record them:

   **NOTE:** EXACT will pop up a warning if the Receptionist clicks the online bookings button without having these contacts recorded:
In this case the Receptionist can either open the Patient File to record the details, or click the Collect Email and Mobile prompt in the Departure Task List:

TIP: When both the Collect prompt and the online bookings button both appear, first collect the contact details:

3. With contacts recorded, the Receptionist clicks the online bookings button to open the Send Online Booking Link by SMS/Email window:
4. The Receptionist checks (ticks) any combination of these checkboxes and then clicks Send.
The following processes then occur:

- The SMS/Email with the booking URL is sent to the patient.
- The online bookings prompt disappears from the Departure Task List:

![Image of the Departure Task List]

- The patient details display in the **Follow Up tab** under the category **OLB Link Sent**:

![Image of the Follow Up tab]

- The booking URL is populated with details of the planned treatment booking requirement, ready for patient booking:

![Image of the booking confirmation page]

---PATIENT procedure---

5. When the patient selects an appointment gap, the software displays a Confirmation page with Provider details:
Once the patient confirms, the software prompts the patient to check for a confirmation message:

---RECEPTIONIST monitoring---

6. The following processes then occur, that the Receptionist can optionally monitor:
   - The booking is made in the appointment book, and displays an online booking icon:
Mouseover the icon for appointment details:

- The patient is removed from the Follow Up tab:

- The patient displays in the Online Appointments tab:

- Note that you can filter the Online Appointments tab by means of Planned Treatment Bookings:

- The booking becomes a statistic in the Feature Usage Report:
Scheduling Recall appointments from Departure

Overview

Patients who have no planned future treatments may be configured for Recall, and the recall booking prompt appears in the Departure Task List.

- **Dentist Recall**: 

- **Hygienist Recall**: 

- **Co-duty Recall**: 

Requirements for Recall actions to display in the Departure List:

- Recalls must be specified as actions in the Appointment Workflow Wizard. See *Configuring Recall Appointments* (on page 65).
- The patient requires a recall appointment to be booked.
- There are no planned or scheduled future treatments for the patient. Only after a patient’s last treatment is completed will that patient become subject to Recall, so in the Departure List you will never see both
Appointment and Recall tasks. 
See how a Provider *Specifies Recall Appointments for Departure* (see "Specifying Recall Appointments for Departure" on page 32)

Be aware of these points:

- You need to consult with the patient for the recall appointment.
- All actions are audited per day, so your Recall scheduling must be done on the same day that it appears in the Departure List or the software will record it as a failed action in the *Appointment Workflow Compliance Report* (see "The Appointment Workflow Compliance Report" on page 18). If you are forced to postpone your Recall scheduling for a patient,
  - You have the option to Follow Up, for which it would be ideal to follow up later in the same day so that the scheduling action is recorded as a successful action in the report.
  - You have the option to type a Reason for the postponement, and this reason will appear in the report.

**To schedule a Recall appointment**

The functionality is the same as for *scheduling Appointments* (see "Scheduling Planned Treatment Appointments from Departure" on page 46), including:

- Hover your mouse cursor over the hyperlink to see details of the Recall.
- Drag the Recall Appointment directly into the appropriate time in the Appointment Book.
- Click the Search icon to open the Appointment Time Search window, pre-populated with first available times, from where you can book the appointment.
- Click the "1st available" hyperlink to display that date in the Appointment Book (then drag the Recall Appointment into the book)
- Click the Exit button to mark this appointment as complete and remove the patient from the Departure List. For *consequences* and a detailed procedure see *Marking an appointment as Completed* (on page 42).

**Processing Custom Tasks from Departure**

**To process a customised task from the Departure List**

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

![Custom Option - Special Offers](image)

2. Complete the required task and then click OK.
   This task will be recorded as complete and it will disappear from the list.
Processing Payments from Departure

This functionality must be configured

See Configuring Payment Processing (on page 66)

To process a payment from the Departure List

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

   ![Payment Dialog](image)

2. Process the payment normally.

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

Recording Patient Details from Departure

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

Click to open the Contact Details dialog and then complete the fields:

![Contact Details Dialog](image)

**TIP:** If the patient is going to be coming in for remaining planned treatment and is likely to become irritated by repeated requests for contact details, click the Prompt in 12 Months button.
Configuring Appointment Workflow

(See also: Overview and Configuration

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

Access the Appointment Workflow Wizard and then configure from the Departure Details screen for any or all of these options:

<table>
<thead>
<tr>
<th>Configuration tasks:</th>
<th>See:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specify the parameters for the Departure List (which standard tasks the Receptionist must process during patient departure), and create custom tasks for the Receptionist to process.</td>
<td>Accessing the Appointment Workflow Wizard (on page 57) Configuring the Departure List (on page 58)</td>
</tr>
<tr>
<td>Prompt the Receptionist to schedule bookings based on the Providers' planned treatment on the chart.</td>
<td>Configuring Planned Treatment Appointment (on page 59)</td>
</tr>
<tr>
<td>Prompt the Receptionist to issue a web address to the patient via SMS and/or Email so that the patient can self-book planned treatment appointments online.</td>
<td>Configuring online booking of planned treatment (on page 61)</td>
</tr>
<tr>
<td>Prompt the Receptionist to book future Recall appointments for patients whose current treatment is completed, and for whom no further treatment has been planned on the chart.</td>
<td>Configuring Recall Appointments (on page 65)</td>
</tr>
<tr>
<td>Prompt the Receptionist to process patient payments.</td>
<td>Configuring Payment Processing (on page 66)</td>
</tr>
<tr>
<td>Prompt the Receptionist to ask for details if a patient's email address is missing, or mobile phone number is missing from the records.</td>
<td>Configuring Contact Details (on page 68)</td>
</tr>
<tr>
<td>Prompt the Receptionist for custom reasons that are not by default included on the Departure Details screen (see &quot;Configuring the Departure List&quot; on page 58). For example:</td>
<td>Configuring Custom departure tasks (on page 70)</td>
</tr>
</tbody>
</table>

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

To access the Appointment Workflow Wizard

3. Select Configure > Practice Settings to display the Practice Settings window.

4. Under Appointment Books, select as follows:

   NOTE: First enable Multicolumn Appointment Book before enabling the Appointment Workflow.

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

What does this configuration achieve?

This creates a template for the possible tasks in the Departure List (see "Using the Departure Task List" on page 36) that appears as a pane on the left side of the Main screen.

To configure the Departure Details screen

1. Access the Appointment Workflow Wizard (see "Accessing the Appointment Workflow Wizard" on page 57) to display the first screen, the Departure Details:

   
   ![Departure Details]

   

2. Check the appropriate boxes on this screen. When you click Next >, the configuration screens will display.

   - **Book a Planned Treatment Appointment** (see "Configuring Planned Treatment Appointment" on page 59): Prompt the Receptionist to schedule bookings based on the Providers' planned treatment on the chart.

   - **Book a Recall Appointment for Treatment Complete Patients** (see "Configuring Recall Appointments" on page 65): Prompt the Receptionist to book future appointments for patients whose current treatment is completed, and for whom no further treatment has been planned on the chart. This is only selectable if your Manage Recalls parameters are configured.

   - **Process a Payment** (see "Configuring Payment Processing" on page 66): Prompt the Receptionist to process patient payments. This by default includes all invoiced amounts, and can be configured to include completed, un-invoiced treatments, and planned treatments.

   - **Prompt for Email Address or Mobile Phone, if Missing** (see "Configuring Contact Details" on page 68): Prompt the Receptionist to ask for details if a patient’s email address is missing, or mobile phone number is missing from the records.

   - **Custom options** (see "Configuring Custom departure tasks" on page 70): Prompt the Receptionist for custom reasons that are not by default included on the Departure Details screen. This could be any task that is relevant to the practice.

SEE ALSO: Improving system performance via Departure List options (on page 64)
Configuring Planned Treatment Appointment

What does this configuration achieve?

With the patient in the chair, Providers set guidelines for the planned treatment appointments that they want for the patient.

When the patient moves through to reception to depart the practice, the Receptionist is prompted in the Departure List (see “Using the Departure Task List” on page 36) to schedule these planned treatment appointments, following the Provider’s guidelines.

Receptionists have multiple tools to facilitate the booking.

For example, they can can book these appointments by means of drag and drop or by editing:

Click the Appointment hyperlink to open the Edit Appointment window:

This functionality needs to be configured...

To configure Planned Treatment Appointment departure tasks

1. Access the Appointment Workflow Wizard (see “Accessing the Appointment Workflow Wizard” on page 57) and check ✔ Book a Planned Treatment Appointment.
2. **Book a Planned Treatment Appointment**: Check / select this \( \checkmark \) if you want patients with planned treatment appointments to book those appointments *before* leaving the Practice.

3. **Sending to the Follow Up Tab** is an option to send unbooked appointments to a postponement area, for handling later (for example, if receptionists are expected to be exceptionally busy):
   - Select **Prompt** to have the system ask whether to send the unbooked appointment to the Follow Up tab.
   - Select **Always** to send unbooked appointments to the Follow Up tab anyway.
   - Select **Never** if you do not want to configure this option.

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

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

5. No further configuration is required for Planned Treatment Appointments. Click **Next>** or **Finish**.
Configuring online booking of planned treatment

Configuration is per Provider

In the Online Booking Configuration screen a Planning tab enables configuration per Provider.

Configuration parameters for each Provider include:

- **Free Time** (no appointments booked for that period, allowing for planned treatment online booking into the free time)
- **SMS and Email Confirmation Templates** (confirmation of patient booking)
- **SMS and Email Sending Templates** (for sending the patient a link to an online booking web page populated with the patient’s planned treatment details). Default Sending templates for sending the web address are provided in the software. You can use these as is, customise them, or create new templates.

**To configure the planned appointment Times, Providers and Email/SMS Templates**

1. Select Configuration > Online Booking to open the Online Booking Configuration screen.
2. Select the Planned tab.
3. Practice Manager users only:
   - **Order of Appointments**: In the case of a combined recall, this sets the order of appointments.
   - **Maximum Minutes between appointments**: Determines the gap between multiple appointments, should they be booked.
   - **Emergency contact email**: Error notifications are sent to this Email address.
4. Select the +1 button to open a window in which to configure a Provider for the planned treatment booking:

   Provider: Select a Provider for whom you will set up the availability for bookings.

   Note that you can optionally populate these fields by selecting the Copy settings from Provider button and then selecting the other Provider from the popup window:
5. Configure the Free time available for planned treatment appointments:
   - **Specific clinic**: Check (tick) this checkbox if you are limiting online bookings to one specific clinic.
   - **All unbooked non-clinic time**: Check (tick) this checkbox if you are limiting online bookings to all time available outside of clinics.
   - **All unbooked time**: Check (tick) this checkbox if you are limiting online bookings to all free time, whether in or out of clinics.

6. Setup **Confirmation Templates** (where the patient receives confirmation of the booking) in SMS and Email. Either use the same templates as for other booking types or create templates especially for treatment planning online booking.

7. Setup the **Sending Templates** (where the patient is sent an online booking link to a web page populated with the patient’s planned treatment details). Either use the default templates provided for SMS and Email, or create custom templates.

Default Sending Templates:

- Default SMS Sending Template (**PLND_OLB_SMS**):

- Default Email Sending Template (**PLND_OLB_EMAIL**):
Merge field requirement for custom templates

**IMPORTANT:** Notice the `[patient.planned.url]` merge field in the above SMS and Email default templates. It propagates the planned treatment details to the booking website so that patients book specifically for their planned treatment. This merge field needs to be inserted in any custom planned treatment booking template that you create.
Improving system performance via Departure List options

To improve system performance by disabling the function to display the first available appointment time

This is checked by default in Configure > User Settings, under the Appointments heading, so by default the Departure Task List includes a 1st Available appointment indicator:

However, this functionality is resource-intensive, so if your system struggles to cope, you may opt to un-check this box.

When un-checked, the First available appointment indicator is replaced with a simple appointment search in the Departure Task List:

NOTE: Users with appropriate permissions can achieve the same result by enabling the Configure > Settings > patret.disable first available hyperlink option:

Summary:

If your system is performing well you need do nothing.

If your system is struggling with performance, and you opt to disable this function, de-select the Show the first available appointment time checkbox in Configure > User Settings, under the Appointments heading. You will need to do this on a per User basis.
Configuring Recall Appointments

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

What does this configuration achieve?

Patients who have no planned future treatments can be scheduled for Recalls (see "Scheduling Recall appointments from Departure" on page 53) by the Receptionist.

Dentist Recall: [Denist Recall] 1:30 min - PP - EX20

Hygienist Recall: [Hygienist Recall] 1:30 min - PP - EX20

Co-duty Recall: [Combined Recall] 1:30 min - PP - EX20

To configure Treatment Completed departure tasks

1. Access the Appointment Workflow Wizard (see "Accessing the Appointment Workflow Wizard" on page 57), and check ✔ Book a Recall Appointment for treatment Complete patients:

![Appointment Workflow Wizard](image)

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

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

What does this configuration achieve?

The result of this configuration is that

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

2. The Receptionist will be able to Process Payments from Departure (see "Processing Payments from Departure" on page 55): when processing a patient’s departure, the Receptionist will see a Payments screen that automatically includes the configured payments.

To configure for payment processing in the Appointment Workflow

1. Access the Appointment Workflow Wizard (see "Accessing the Appointment Workflow Wizard" on page 57), and check the process a Payment checkbox:
2. When you click Next, you will be prompted for further details:

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

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

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

For **Invoiced Treatment**, select one of two options:

The **Balance** payment is based simply on what the patient owes overall (this is selected by default).

The **Open Invoice** payment is based on particular invoice payments that are due, irrespective of the patient overall balance. Even if the patient balance is positive, they may still need to pay against an open invoice.

Let’s look at an example where the patient has an overall positive balance, but may still be required to pay against a particular open invoice:

3. Select **Next** or **Finish**.
Configuring Contact Details

What does this configuration achieve?

When processing patient departures, the Receptionist will be prompted to update patient contact details (see "Recording Patient Details from Departure" on page 55) from an option in the Departure List:

This task relates to blank Email and/or Mobile Phone fields in the patient record. If either of these change for a patient, EXACT has no way of knowing, and will not create a task in the Departures Task List. To cover this possibility, you could configure a Custom task (see "Configuring Custom departure tasks" on page 70) to "Ask patient if any contact details have changed."

**IMPORTANT:** The Collect Mobile prompt triggers if the SMS Mobile checkbox is unchecked (un-ticked) in the Patient File. To reduce these Collect Mobile prompts, always check this checkbox.

SEE ALSO: Reducing automated "Collect Mobile" prompts (on page 39)

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

Access the Appointment Workflow Wizard (see "Accessing the Appointment Workflow Wizard" on page 57), select the Email and Phone options, and select Next / Finish.
Configuring Custom departure tasks

What does this configuration achieve?

When processing patient departures, the Receptionist will be prompted to complete customised tasks (see "Processing Custom Tasks from Departure" on page 54) in the Departure List:

For example, here the receptionist is prompted to discuss current special offers:

To configure Custom Options in the Departure List:

1. Access the Appointment Workflow Wizard (see "Accessing the Appointment Workflow Wizard" on page 57), and in the Departure Details screen, select Custom Options:

2. Click Next >

3. Depending on your configuration selections, you may need to configure other screens first, but you will come to the Custom Options screen, from which you need to select the button:
4. When the Add Custom Option screen displays, complete the fields to create your custom task for the Receptionist to process. For example:

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

5. Select **Patients** by Query Template. Select a template using the or buttons (the latter will allow you to **create a new query** (see "Selecting patients by means of Query Templates" on page 72), if required).

6. Select **OK**.

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

7. Click **Finish**. This task will now appear in the Departure List.
Selecting patients by means of Query Templates

At various points in EXACT you can select patients by means of Query Templates, which are saved queries/searches.

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

To select values by scrolling for Query Templates

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

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

   ![Unseen Patients For Last 2 Y](image)

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

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

1. **Click** the selection button to open the **View Query Templates** window.

2. **Click** Import, then browse for and Open the file, to have it list in the **Description** box window:
3. Click to select it, and then click OK. You will be prompted to type a Description and Notes before selecting this template into the original field.

**To create a New Query template:**

(See also: To Create a New Query)

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

2. Type a Description for this Query template. We’ll use a “Birthday” example for a Birthday Reminder template.

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

4. In the resulting Edit patient Selection window, configure the query date range, in this example to find Patients with a birthday in the coming week.
5. Select OK to return to the Add Query template window.

   **Note:** You can further customise this selection using the controls highlighted below. See To Create a New Query for more details.

6. Click **OK > OK** to return to the **Custom Options** screen, and then click **Finish**.
Disabling the Departure Task List for a User

This feature:

Clinicians or other users who have no need to view the Departure Task List in their view of the Main (Appointment) book can opt to disable this sidebar based on their User Settings.

![Departure Task List enabled](image1) ![Departure Task List disabled](image2)

**Default configuration:**

When the Appointment Workflow is enabled in Configure > Practice Settings,

![Appointment Books](image3)

... this by default enables the Departure Task List display for *all* Users.

To hide the Departure Task List you need to *disable* the default setting per user.

**To disable the Departure Task List for a particular User**

1. Open Configure > User Settings.
2. Select the User (in this example, "DEMO"): ![Sort by Code](image4)
3. Under the Appointments area, check (tick) Hide Appointment Workflow:

   ![Appointments](image5)

   (You will only see this checkbox if you have EXACT version 11.3 or later, and the Appointment Workflow has been enabled under Configure > Practice Settings)
4. Click the Save button at the top of the page:

   ![Sort by Code](image6)
5. **NOTE:** If the User is logged on, he/she will need to close and re-open the Main (Appointment) screen to see the change.

To close:
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