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Section 1 - Getting Started

Welcome to Comart Dental V5!

The purpose of this guide is to walk you through the features of the Comart Dental V5 dental software application and explain in simple terms how to get the most out of the software.

The guide assumes that you have at least a basic understanding of Microsoft Windows and are familiar with Windows concepts (e.g. 'double-clicking', 'right-clicking etc.).

If you are not, then please see the Windows Help file. This can be accessed by clicking on the START button (usually at the bottom left of your screen) and then choosing HELP. Your Microsoft Windows manual and CD also contain helpful information.

About the Comart Dental V5 Manual

This manual is designed to be as comprehensive and informative as possible. It is divided into three sections:

Section 1 – Getting Started

The Getting Started section contains all the information you need to...

- Install Comart Dental V5
- Log on to Comart Dental V5 for the first time

Section 2 – User Guide

The User Guide will be your major point of reference for the Comart Dental V5 functionality. Everything that the program does and how to do it is explained in the User Guide.

Please bear in mind that if you cannot find assistance with any particular situation in the manual, you can always call the support line who will be pleased to help you in any way they can.

Section 3 – Tutorials

A brief discussion on how you can get further training in using the product.



Tip: A quick way to find the function of any button in Comart Dental V5 is to hover the mouse over it for a couple of seconds. A tool tip will appear with a brief explanation of what that button does.

Installation and Logging On

Installing Comart Dental V5

The installation of the Comart Dental V5 software is ordinarily performed by the staff at Software 4 Dentists. If you need to add a new workstation or reinstall the software, please contact the support desk, who will be happy to assist.

Licensing Comart Dental V5

Before you can use the program, you must first license every PC that will be running the Comart Dental V5 software. To do this:

- Start the program.
- Contact Software 4 Dentists with your software code.
- Type in the license key given to you and select 'OK'.

Your software is now fully licensed and can be used on that machine.

You can e-mail your unique software code to us using the address support@comartholdings.com. We will then supply you with a license key that will unlock your system and permit you to use it.

Launching Comart Dental V5

When the installation and licensing are complete, you are ready to begin using Comart Dental V5 for the first time!

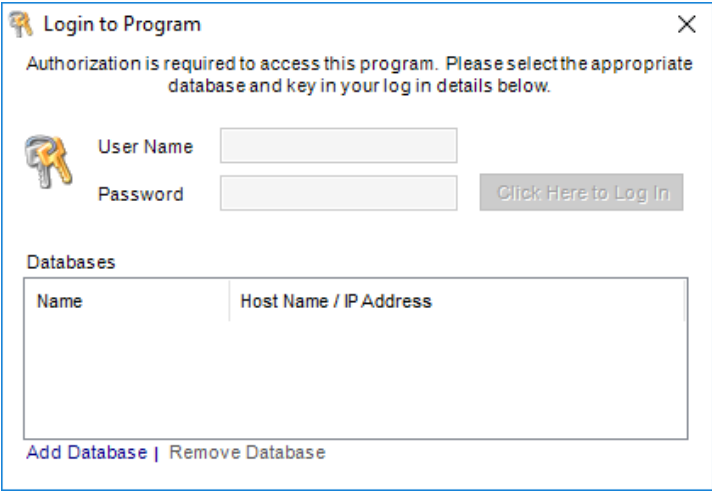
A Comart Dental V5 icon has been placed on your desktop. Double-clicking the icon will launch the program.

Alternatively, you can launch the program by doing the following:

- Click the Windows "Start" button
- Scroll to the "Comart Dental" folder
- Click on the "Comart Dental V5" icon, inside that folder

Initialising the Database

When you run the Comart Dental V5 software, you will see the following window:

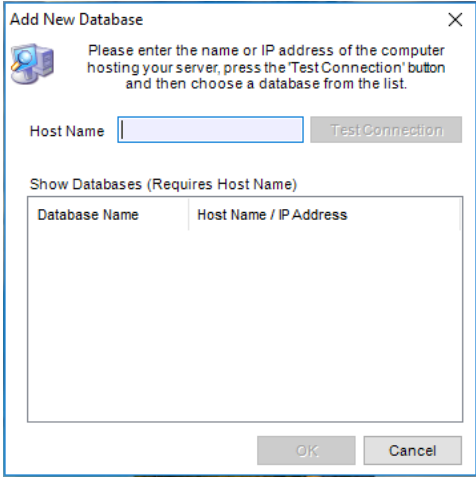


The "Login to Program" window has a title bar with a close button (X). The main text reads: "Authorization is required to access this program. Please select the appropriate database and key in your log in details below." Below this, there is a key icon and two input fields: "User Name" and "Password". To the right of the "Password" field is a button labeled "Click Here to Log In". Below the input fields is a section titled "Databases" containing a table with two columns: "Name" and "Host Name / IP Address". At the bottom of the window, there are two links: "Add Database" and "Remove Database".

Name	Host Name / IP Address
------	------------------------

The first time you run Comart Dental V5, you need to provide the location of the central database. Click "Add Database".

The following window is displayed:



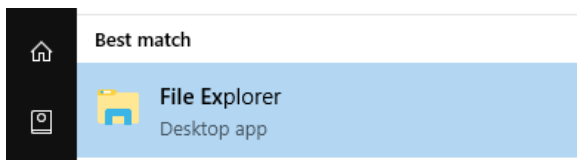
The "Add New Database" window has a title bar with a close button (X). The main text reads: "Please enter the name or IP address of the computer hosting your server, press the 'Test Connection' button and then choose a database from the list." Below this, there is a "Host Name" input field and a "Test Connection" button. Below the input field is a section titled "Show Databases (Requires Host Name)" containing a table with two columns: "Database Name" and "Host Name / IP Address". At the bottom of the window, there are two buttons: "OK" and "Cancel".

Database Name	Host Name / IP Address
---------------	------------------------

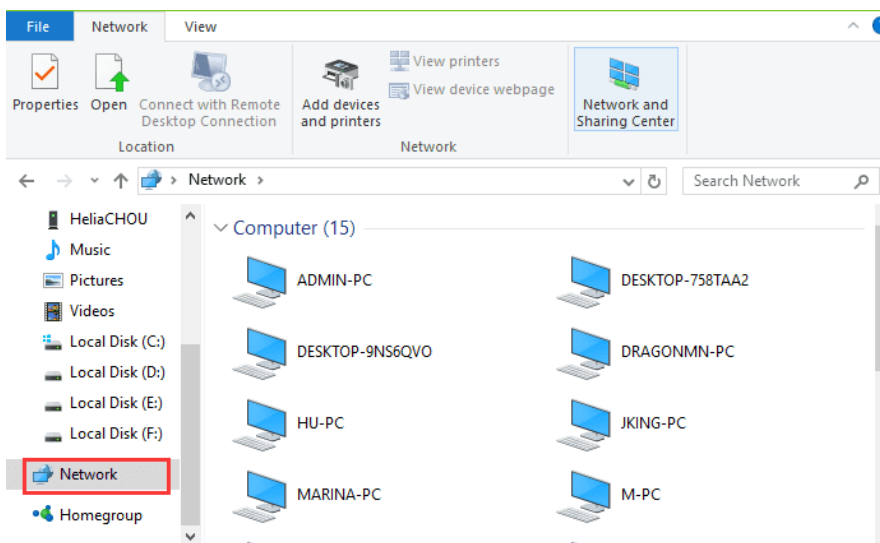
The "Host Name" is referring to the server that is running the database. The server PC was chosen during the original installation of Comart Dental V5 in your practice.

You can find the network names of the PCs connected to the network in Windows File Explorer:

- Press the Windows “Start” button
- Start typing “File Explorer” and select the option when it is offered



- Enter the “Network” section and allow the list time to populate



The names of all of the devices accessible on the Network are listed.

- Note down the name of the PC you use as your Comart Dental V5 server.
- Close the File Explorer

Return to the Comart Dental V5 - Add New Database window

- Enter the name you noted down into the “Host Name” box
- Click “Test Connection”.

If the connection is successful, the database(s) will be shown for you to connect to (this is usually named “bridgeit”). Select the database and press “OK”.

Note: If you have difficulties in connecting to your database, then please contact the Support Desk for assistance.

Section 2 – User Guide

Comart Dental V5 Basics

Terminology

There is some basic terminology, which it will be helpful to be familiar with in the context of the Comart Dental V5 application.

"Database"

A collection of data, or more accurately – records. In Comart Dental V5, there are a number of different databases:

- Patients
- Contacts
- Staff Members
- Treatments
- Invoices
- Payments

Collectively, we refer to all of the above information as your 'Comart Dental V5 Database'.

"Patient"

Someone who comes to your practice for treatment.

"Contact"

Someone who is affiliated with your practice, but who is not a patient - e.g. an insurance company, a supplier etc.

"Staff Member"

A person who works at your practice - e.g. a dentist, receptionist, dental nurse etc.

"Treatment"

A treatment can be a service (filling/check-up etc.), or a product (mouthwash, toothbrush etc.). Treatments are itemised and listed on invoices and receipts.

"Invoice"

A bill which goes to a contact or patient to inform them that they owe the practice a certain amount of money.

"Payment"

A payment made by a contact or patient to your practice – usually this will be in response to an invoice.

"Credit Note"

A credit note is used to credit a patient/contact account. No money is taken when crediting an account – this is the key difference between a credit and a payment. If you take money from the patient/contact then use a "Payment", not a "Credit Note".

"Refund"

A payment made by your clinic back to a contact or patient.

The Comart Dental V5 Side Panel



The side panel is always on the left side of the main screen. There are two main sections to the side panel – Navigation and Common Tasks.

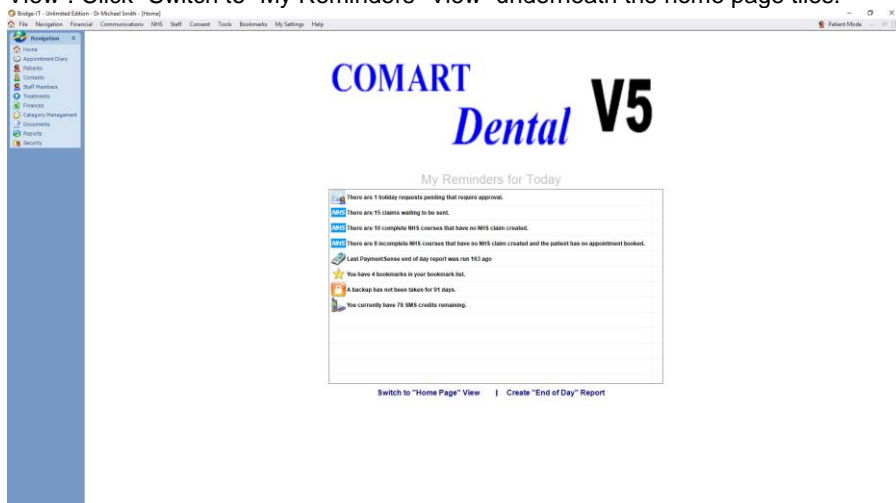
The "Navigation" panel allows quick access to key parts of the program. The "Common Tasks" panel is context-sensitive, and will offer additional options depending upon the window you are currently viewing. In the example image on the left the user is looking at the Patient Database.


Your Comart Dental V5 Home Page

Your home page gives you access to all key areas of Comart Dental V5 by simply clicking the appropriate tile. The links are also permanently listed in the Navigation pane of the side panel on the left of the application.



As an option, the "Home Page" tile view can be switched to the "My Reminders View". Click "Switch to 'My Reminders' View" underneath the home page tiles.



 **Tip:** You can return to the Home Page at any time, by clicking the "Home" link, which permanently resides in the Comart Dental V5 side panel, under "Navigation".









My Reminders

This view notifies lists tasks and important reminders *specific to the user logged in*, as well as general notes.

These can include:

- The number of assigned tasks for you today
- Holiday requests awaiting approval
- Outstanding balances on invoices in the past financial year
- How many days since an end of day report was run
- The number of FP17 claims forms awaiting submission
- The number of *complete* courses of NHS treatment that have not had an FP17 created
- The number of *incomplete* courses of NHS treatment that have no FP17 and have no appointments booked
- How many days since your last backup was taken
- The number of SMS credits you have left

My Reminders for Today

	There are 1 holiday requests pending that require approval.	
	There are 15 claims waiting to be sent.	
	There are 10 complete NHS courses that have no NHS claim created.	
	There are 8 incomplete NHS courses that have no NHS claim created and the patient has no appointment booked.	
	Last PaymentSense end of day report was run 163 ago	
	You have 4 bookmarks in your bookmark list.	
	A backup has not been taken for 91 days.	
	You currently have 78 SMS credits remaining.	

[Switch to "Home Page" View](#) | [Create "End of Day" Report](#)

Working with Database Grids

Q. What is a "database grid"?

Very much like a spreadsheet, Comart Dental V5 uses grids to display database records in rows and columns. This is the most efficient way of viewing large quantities of data in as clear a way as possible.

These grids are very powerful and can be highly customized to suit your needs. Here's an example of a Patient Database grid:

Patients (12 Records) Show Grid Settings											
Code	Title	First Name	Middle Name	Last Name	Sex	DOB	Marital Status	Address 1	Address 2	Town	County
00003	Lord	Reginald	Brooke	Farquard	Male	01/06/1971	Single	Castle House	Bakers Lane	Huntingdon	Cambridgeshire
00004	Ms	Caroline	Hilary	Firstady	Female	18/07/1978	Widowed	White House	Presidents Road	Boston	Lincolnshire
00006	Mr	Theostry	G.	Hulse	Male	31/01/1987	Married	4 Hadens Lane	Pinchbeck	Spalding	Lincolnshire
00008	Miss	Charlotte	Anne	Moore	Female	04/08/1990	Married	966 Lincoln Road	Paxton	Peterborough	Cambridgeshire
00007	Miss	Hazel	Mae	Kissinger	Female	25/04/1977	Single	52 Chapel Road	Fletton	Peterborough	Cambridgeshire
00009	Mr	Ian	Granville	Stokes	Male	07/02/1980	Single	86 Knot Street	Woodston	Peterborough	Cambridgeshire
00010	Mrs	Stephanie	Sarah	Yorke	Female	19/12/1965	Married	2 Windsor Street	Twenty	Spalding	Lincolnshire
00011	Miss	Susan	Jane	Firstady	Female	01/05/2002	Single	White House	Presidents Road	Boston	Lincolnshire
00012	Mrs	Michelle	Pauline	Hulse	Female	27/11/1970	Married	4 Hadens Lane	Pinchbeck	Spalding	Lincolnshire
00013	Master	George	Adam	Hulse	Male	30/09/1997	Single	4 Hadens Lane	Pinchbeck	Spalding	Lincolnshire
00014	Miss	Pamela	Bernice	Hulse	Female	14/02/2000	Single	4 Hadens Lane	Pinchbeck	Spalding	Lincolnshire
00015	Mr	Barney	Michael	Moore	Male	19/12/1970	Married	966 Lincoln Road	Paxton	Peterborough	Cambridgeshire

Navigating through a Database Grid

You can navigate through the database by:

- Clicking the up / down arrows with your mouse (on the right hand scroll bar)
- Using a mouse wheel to scroll (if your mouse has one)
- Pressing the "Up / Down / Left / Right" cursor keys
- Pressing the "Page Up / Page Down / Home / End" keys
- Searching

Column Resizing

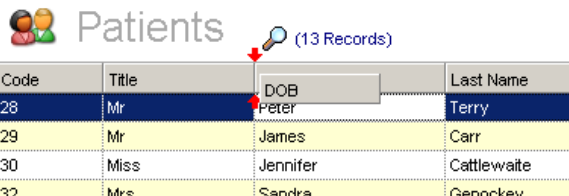
If you wish to resize (i.e. widen or narrow) the grid columns, then move the mouse cursor over the boundary between two columns and you will see the drag symbol appear...



Click and hold the left mouse button and drag the column to the size you require. Alternatively, if you double-click when the drag symbol appears, the column to the left will be automatically resized to fit the data.

Column Moving

If you wish to change the order of columns in the grid, simply drag the column header to the new location. While dragging the header, you will see some red arrows appear which indicate where the column will be moved to when you release the button.



Code	Title	DOB	Last Name
28	Mr	Peter	Terry
29	Mr	James	Carr
30	Miss	Jennifer	Cattlewaite
32	Mrs	Sandra	Gannon

Sorting Records

Any column in the grid can be sorted alphabetically (or numerically if the column contains numerical data) in ascending or descending order.

To sort a column in ascending order, simply click the column header at any point. Here is an example of sorting the DOB column:

DOB	Marital Status	Address 1	
19/12/1965	Married	2 Windsor Street	T
31/10/1967	Married	4 Hadens Lane	F
27/11/1970	Married	4 Hadens Lane	F
19/12/1970	Married	965 Lincoln Road	F
01/08/1971	Single	Castle House	B
25/04/1977	Single	52 Chapel Road	F
18/07/1978	Widowed	White House	F
07/02/1980	Single	85 Knot Street	V

As you can see, a grey triangle pointing upwards appears indicating an ascending sort order. To sort the column in descending order, simply click the column header again and the grey triangle will point downwards indicating a descending sort order.

By sorting on one column, and then holding the SHIFT key whilst clicking another column header, you can sort multiple fields at once.

Grouping Records

You'll notice at the top right corner of the grid is a link that says **"Show Grid Settings"**. Clicking on this link will reveal a side panel on the right that gives you access to further grid functions. At the top of this panel is the option to **"Display Grouping Row"**.



Checking this box will cause a grouping row to appear at the top of the grid. In this row are the words "Drag a column header here to group by that column".

As an example, suppose you want to group your patient database based on their sex (male / female).

Simply drag the column ("Sex") into the grouping row as shown in the screenshot below...



After grouping in this way, the end result will look like this...

Code	Title	First Name	Middle Name	Last Name	Sex	DOB
- Sex: Female						
00010	Mrs	Stephanie	Sarah	Yorke	Female	19/12/1965
00012	Mrs	Michelle	Pauline	Hulse	Female	27/11/1970
00007	Miss	Hazel	Mae	Kissinger	Female	25/04/1977
00004	Ms	Caroline	Hilliary	Firstlady	Female	18/07/1978
00006	Mrs	Charlotte	Anne	Moore	Female	04/08/1990
00014	Miss	Pamela	Bernice	Hulse	Female	14/02/2000
00011	Miss	Susan	Jane	Firstlady	Female	01/05/2002
- Sex: Male						
00005	Mr	Timothy	G.	Hulse	Male	31/10/1967
00015	Mr	Barney	Michael	Moore	Male	19/12/1970
00003	Lord	Reginald	Brooke	Farquaad	Male	01/08/1971
00009	Mr	Ian	Granville	Stokes	Male	07/02/1980

You'll notice that the grouped headers (in this case "Female" and "Male") have a little + or – next to them which allows you to show or hide the records which are grouped under that header.

You can group by as many columns as you wish, for example you might group by "Sex" as above and then by "Marital Status".

To remove the grouping, simply drag the column header back out of the grouping area and release on anywhere in the grid.

Experiment with this feature for yourself to see how powerful this can be.

Searching a Database

Comart Dental V5 has a powerful search feature, which allows you to search a database and quickly locate a specific record in the grid. To open the search window, click on the number of records link at the top of the grid screen (next to the magnifying glass). This will display the Find Patients window:

Code	First Name	Last Name	DOB
00009	Ian	Stokes	07/02/1980
00010	Stephanie	Yorke	19/12/1965
00004	Caroline	Firstlady	18/07/1978
00011	Susan	Firstlady	01/05/2002
00003	Reginald	Farquaad	01/08/1971
00005	Timothy	Hulse	31/10/1967
00006	Charlotte	Moore	04/08/1990
00007	Hazel	Kissinger	25/04/1977
00012	Michelle	Hulse	27/11/1970
00013	George	Hulse	30/09/1997
00014	Pamela	Hulse	14/02/2000
00015	Barney	Moore	19/12/1970

At first, all of the records will be displayed, however you can quickly narrow down the records by using the link buttons at the bottom. In the case of a person search you can either "Display All" which shows all persons, both patients and contacts, "Patients" which displays patients only, "Contacts" which displays only your contacts, and "Payors" which will show only those contacts which have been designated as payors.

By filling in the search criteria at the top of the screen you can reduce the selection much further. In the case of a person search these fields are "Code", "First Name", "Last Name", and "Date of Birth". Type in any known criteria and press the "Search" button. Only records that match your selection criteria which then be displayed.

The "Code" field is the most specific search field, since it is unique. However, usually it is sufficient to type in the persons "Last Name" to narrow down the records considerably.

Search will also display partial matches by default. For example, searching on the "Last Name" field for "sm" will match: "Small", "Smith", "Smythe" etc. You may optionally decide to limit the result to exact matches only by ticking the "Exact Match" checkbox before pressing "Search".

Please note, by default inactive patients are not listed, however you can include these patients by ticking the "Include Inactive" tick box, next to "Exact Match".

Once you find the correct record, double-click it or select it and press OK to open the patient record.

Quick Links to Patients

When you open a patient record, that record will be recorded in the top right hand corner of the patient list. Hovering your mouse over the name shown in the top right, will drop down a whole list of recently viewed patients. You can quickly jump straight to each patient record by selecting them from the list.

		LAMPERT, CHRISTIAN MR
		CROSS, LUCY MISS
Business P		WILLIAMS, PETER MR
07591222		CROSS, JIMMY MR
07731333		CROSS, WENDY MRS

The Grid Settings

At the top right side of the grid, there is a label with the caption **"Show Grid Settings"**. Clicking this will show the grid settings panel, as seen to the right.

This screenshot is the grid settings panel for the Patient database grid. Please note that the "Visible Columns" section will differ depending on which database you are looking at (e.g. patient, contact, staff etc.).

Display Grouping Row

This option was discussed earlier under Grouping Records.

Displaying a Filter Row

Shows an additional row at the top of the grid that allows you to enter any value into it. Pressing enter on that value will filter the grid based on that value.

Odd / Even Row Colour

You can change the colours of the even and odd grid rows to whatever colour you like. This makes it easier to see which data belongs to which row.

Reset Grid Settings

If you get into a muddle with your grid settings and have incorrect groupings or sorting of data, pressing this button will immediately reset the grid to the default view.

Print Grid Data

This function allows you to print the data in a grid format. The data can be printed out or saved into a suitable file format (such as XPS or PDF, depending on the software you have available). It is best that you choose what data you would like included from the visible columns section below.

Exporting Grid Data

Whatever view of the data you have in your grid can be exported to Microsoft Excel using this function. Simply get the grid data looking as you want it to look, then press this button and specify a file name and location where you want the data exported. You can then view the data in an Excel spread sheet (or compatible) format.

Visible Columns

These are fields which you can choose to include or exclude from the database grid.

At times you may not want to see every column in the grid, only those that are important to you. This feature enables you to quickly view only data columns that



The screenshot shows the 'Grid Settings' panel. At the top, there is a 'Grid Settings' title with a small icon. Below the title are two checkboxes: 'Display GroupingRow' and 'Display FilterRow', both of which are currently unchecked. Below these are five buttons: 'Odd Row Colour', 'Even Row Colour', 'Reset Grid Settings', 'Print Grid Data', and 'Export Grid Data'. At the bottom, there is a section titled 'Visible Columns' which contains a list of fields with checkboxes next to them. The fields are: Code, Title, First Name, Middle Name, Last Name, Sex, DOB, Marital Status, Address 1, Address 2, Town, County, Postcode, Country, Home Phone, Business Phone, Mobile, and Fax. All checkboxes are currently checked. At the bottom of the 'Visible Columns' section, there are two links: 'Select All' and 'Select None'.

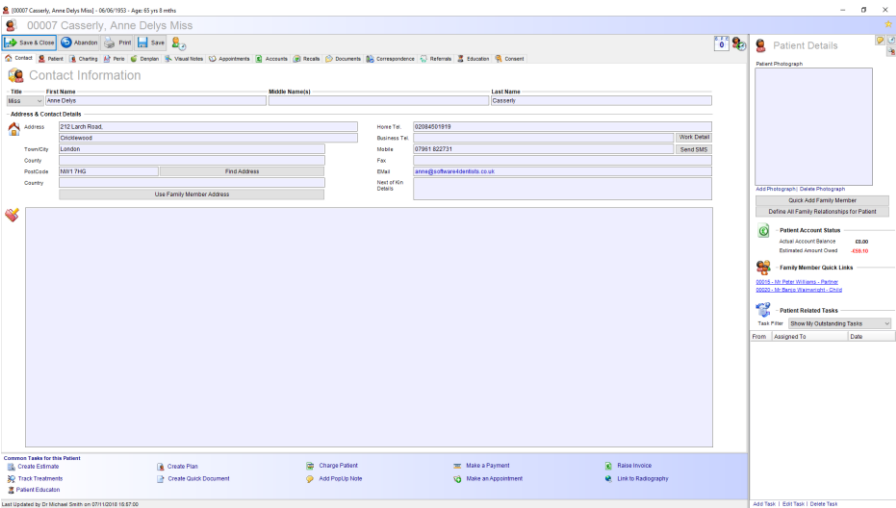
you want to see. You can quickly select **"Select All"** or **"Select None"** using the links at the bottom of the grid settings.

Working with Editors

Editors are used in Comart Dental V5 to view / change details for records of any type (patients, contacts, staff, treatments, invoices etc.).

Each piece of information (for example "First Name" or "Postcode") is referred to as a field. Some of the editors have more than one page of information in order to accommodate various sub sections.

For example, notice the different pages on the patient editor shown below...



There are 14 pages of information in total: Contact, Patient, Charting, Perio, Denplan, Visual Notes, Appointments, Accounts, Recalls, Documents, Correspondence, Referrals, Education and Consent. (Some of these pages are available only if subscribing to the additional module).

These will be discussed in detail later (see "The Patient Editor").

Navigating within Editors

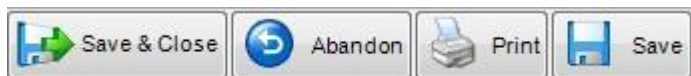
The following keys will be useful to you as you navigate around the Comart Dental V5 editors:

Tab	Move to the next field in the editor
Shift + Tab	Move back to the previous field in the editor
Ctrl + Tab	Move on to the next page in the editor (if the editor has

	multiple pages)
Shift + Ctrl + Tab	Move back to the previous page of the editor (if the editor has multiple pages)

The Editor Toolbar

The editors all have roughly the same functions on the toolbar:



These buttons have the following functions...

Save & Close	Saves any changes you made to the current record and then closes the editor.
Abandon	Ignores any changes made to this record and closes the editor.
Print	Prints information from the page that is currently open.
Save	Saves any changes you have made to the current record, but does not close the editor.

Editable and Non-Editable Fields

Most fields within Comart Dental V5 are editable, however there are some that are not. When using editors, all fields that are coloured in lavender are editable, those that are a light grey are read-only. In the example below, Recipient, Description and Invoice Date are editable (they have a lavender background), whereas Invoice Number and Patient are not (they have a light grey background). The Staff Member field has a dropdown arrow, this allows you to select from a pre-defined list of options.

Invoice Details		Recipient/Patient Details	
Invoice Number	663	Recipient	<input type="text"/>
Description	Invoice	Patient	00801
Invoice Date	31 / 01 / 2019		Mr Paul Taylor
Staff Member	Dr Michael Smith		

Often a field will be editable when first created but become non-editable once it has been saved. For example, when you create an invoice most of the fields are

editable, but once it has been saved the fields change colour to a light grey and can no longer be changed.

The Person Selector

Some fields require that you select a person (contact or patient). For example, look at the payor field in the following screenshot:

Payor



When presented with two fields:

- The first field is used to type a “Code”, this is the unique identifier for a specific record. In this case, when searching for a person, you could type the Patient “Code” (shown in the patient database) to immediately select the desired patient.
- The second field displays the currently selected record. (Note: if you begin to type into this field, the Find Person window will automatically open, in the same way as pressing the magnifying glass)

There are two icons next to the fields:

- Find Person – The magnifying glass icon. This is exactly the same as was discussed earlier (in “Searching a Database”). Search for a patient and select “OK” when finished, or “Select None” to empty the field.
- Family Member - The house and person icon. This lists the family members of the patient, allowing you to quickly select an appropriate individual (see below).





Please note that in order for this list to work correctly you must first have defined the patient relationships discussed later in this document under **"Define Patient Relationships"**.





Working with Categories








Comart Dental V5 allows you to categorise records in certain ways. As with many parts of the program, this is entirely customisable to suit your requirements.


Let's use the Occupation category as an example. Here's an example of the "Patient" page in the Patient Editor:

 [00019 Mann, Lawrence Mr] - 01/08/1957 - Age: 61 yrs 6 mths

 **00019 Mann, Lawrence Mr**

 Save & Close  Abandon  Print  Save

 Contact  Patient  Charting  Perio  Denplan  Visual Notes  Appointment

 **Patient Information**

- Patient Details

Patient Code

00019

Sex

Male

DOB

01 / 08 / 1957


61 yrs 6 mths

Patient Joined


05 / 05 / 2013

Previous Name


Marital Status




Occupation



How Patient Found Us



Note that some of the fields have a folder icon after them  , This indicates that the value in this field is a "Category".

In the above screenshot the "Occupation" field is currently empty for this patient.

Clicking the dropdown arrow at the end of the field will display the other possible choices for this field:

Occupation

How Patient Found Us

- Category/Status

Patient Group

☒ Active

- Patient Care

Dentist

Hygienist

Referred By

Referred To

GP

Housekeeper

Housewife

Immigration Advisor

Interior Design

IT

Journlist

Lawyer/Barrister

Lecturer

Manager

Marketing

Medical Doctor

Medical P.A

Model

Nanny

Nurse

PA

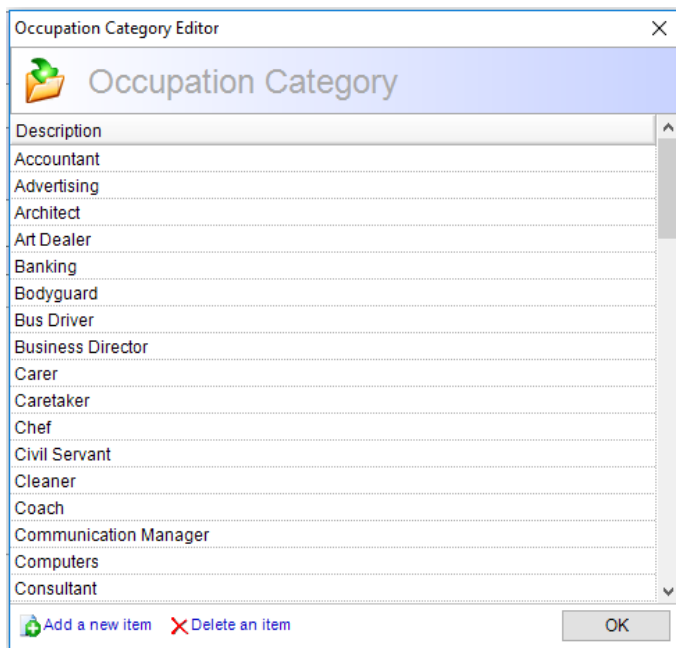
Personal Trainer

Pharmacist

Porter

Q. What if I want to add a new category or delete all the existing ones and categorise my occupations differently altogether?

Clicking on the "Edit Category List" button (the yellow folder icon) to the right of the field will allow you to do just this by showing the Category editor:



The image shows a software dialog box titled "Occupation Category Editor". It has a light blue header bar with a yellow folder icon and the text "Occupation Category". Below the header is a list of occupation categories. The list is currently empty, with only a "Description" header visible. At the bottom of the dialog, there are two buttons: "Add a new item" (with a green plus icon) and "Delete an item" (with a red X icon). To the right of these buttons is an "OK" button.

Description
Accountant
Advertising
Architect
Art Dealer
Banking
Bodyguard
Bus Driver
Business Director
Carer
Caretaker
Chef
Civil Servant
Cleaner
Coach
Communication Manager
Computers
Consultant

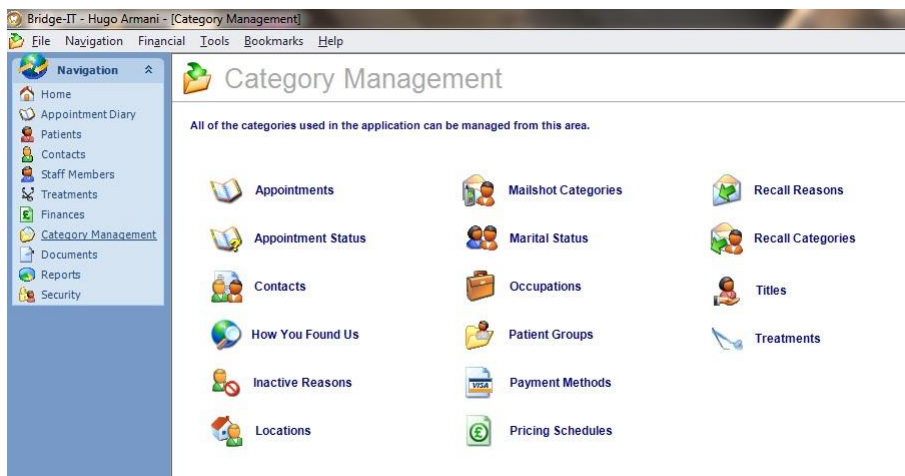
From here you can add, edit or delete categories simply by clicking on them.

After making the desired changes, click OK to close the category editor and then you can select options from the newly defined list.

All the other category editors can be changed in the same way with the exception of the Appointment Category editor and the Appointment Status editor. These differences will be discussed later on.

Category Management

All program categories can be accessed from a central area called "Category Management". To access this area, simply select "Category Management" from the left side panel and you will see a full list of every type of category used throughout the program. Below is a screenshot of this area:

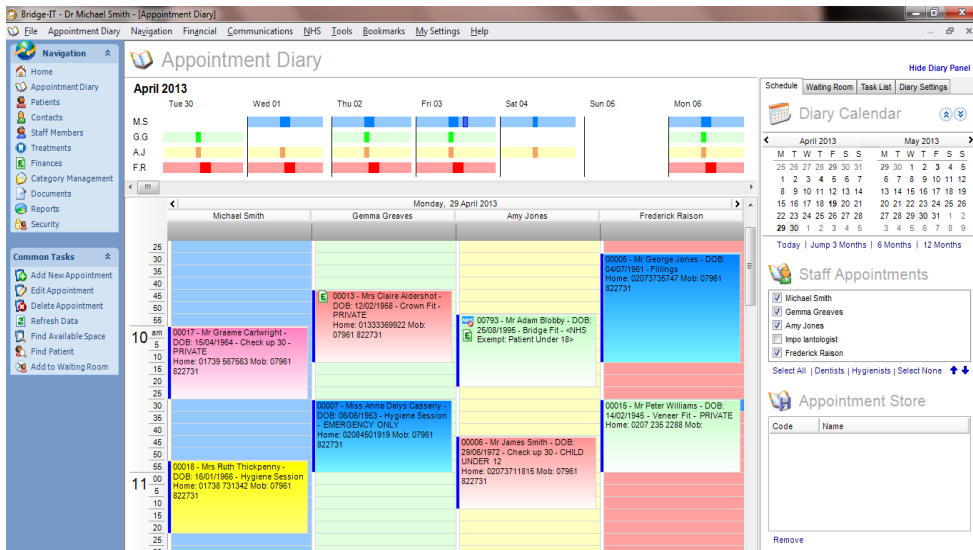


Clicking on any of the links will bring up the Category Editor as described in "Working with Categories".

The Appointment Diary

Navigating the Diary

The Appointment Diary has been designed to allow you maximum flexibility in creating appointments, editing appointments and viewing them.



The diary shown above is looking at a single day for four staff members. As you'll see later on, it's possible to show a range of days for a number of staff members.

Also, this diary is set up for 5 minute slots of time, though this can easily be changed (see "Diary Settings" discussed later).

Navigating with the Calendar

To the top right of the diary is the calendar. This calendar can be used to select which dates to display in the diary. Simply click the desired day on the calendar and the diary will show the appointments on the selected day.



You can scroll through the months forward and backward by clicking the appropriate arrows (left and right respectively). You may also find the links underneath the calendar helpful. These enable you to instantly jump to today or forward 3, 6 or 12 months from the currently selected date. To change the month, you can also click on the top of any calendar (where the month is showing) and hold down the left mouse button. A list of all of the months will be displayed allowing you to quickly choose an appropriate entry.

Selecting Staff Members

It is also possible to filter which appointments you want to see. Under the heading "Staff Appointments" you can tick next to the practice staff members. The diary will then show only the appointments for the selected staff members.



The screenshot shows a web interface titled "Staff Appointments" with a calendar icon. Below the title is a list of staff members, each with a checkbox and their name. The names are Annette Terry, David Allen, Michael Abbot, and Tiffany Calhoon. The checkboxes for Annette Terry and Michael Abbot are checked. Below the list are four text links: "Select All", "Dentists", "Hygienists", and "Select None", followed by two blue arrows pointing up and down.

Staff Member	Selected
Annette Terry	<input checked="" type="checkbox"/>
David Allen	<input type="checkbox"/>
Michael Abbot	<input checked="" type="checkbox"/>
Tiffany Calhoon	<input type="checkbox"/>

Select All | Dentists | Hygienists | Select None  


Notice the text links underneath the list. These let you select all; select nobody; select only dentists or select only hygienists.

Changing the Diary Settings

The diary settings allow you to alter the setup of the diary. At the top right of the screen, there are four tabs, the last of which is "Diary Settings".

You need to click this tab to see the options below.

ScheduleWaiting RoomTask ListDiary Settings

 **Diary Settings**

Appointment Book Settings

Schedule View FormatDay View

Schedule Time Format12 Hour

Schedule Start/End Hour823

Schedule Interval Height18

Show Intervals Every10 Minutes

Show Appointments forLast 12 Months

Alternate Row ColoursNone

Show up to10Staff columns in the schedule

☒ Show appointment notes under the description

☒ Show minutes in appointment book


☒ Show the timeline at the top of the screen

☐ Always display the current time ToolTip


☐ Highlight the current time in the diary

Update appointment book every1minutes
Select '0' if you are the only person booking appointments

Appointment Book Colours

 [Configure Diary Colours for Providers](#)

Waiting Room Settings

 Set Finished StatusComplete

☒ Remove patient from waiting room if finished

☐ Play sound when new patient arrives

☐ Play sound when provider calls patient

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Below is a description of what each setting does...

Schedule View Format	Allows you to change the format of how you view dates in the diary. The default is viewing one day at a time, however you can alter this to see a whole week or even a whole month at a time.
Schedule Time Format	Allows you to alter whether the times in the diary appear in 12 or 24 hour format.
Schedule Start/End Hour	Select which hours of the day actually appear in the diary so you don't have to view out of hour areas.
Schedule Interval Height	Changes the row height of each row in the diary. Smaller row heights allow you to view more hours on the screen at any one time.
Show Intervals Every	Allows you to change the length of each time slot in the diary. The default is 5 minute intervals, however this can be changed to 10, 15, 20, 30 and 60 minutes.
Show Appointments For	Over a period of time, literally thousands of appointments can be made and this may slow the responsiveness of the diary, especially if you are running over a network. This option enables you to only view the last week, 3, 6 or 12 months' worth of appointments in the diary.
Show Up To # Staff Columns in the Schedule	Specifies the maximum number of staff member's appointments that will be viewed on the screen at any one time. You can view up to ten staff member appointments in one go.
Show Appointment Notes Under Description	Enables you to see the appointment notes as well as the standard description in the appointment box in the diary.
Show Minutes in Appointment Book	Causes minutes to appear between the interval time slots making it easier to identify exactly how long an appointment is, especially when resizing in the diary.

Show Appointment Timeline	You can view a weekly timeline along the top of the
---------------------------	---

	diary if you wish. This colour codes the week for each provider with green – provider work hours, blue – providers appointments and brown – blocked areas. This enables you to quickly see if there is a slot available for the provider at a glance.
Always display the Current Time ToolTip	This allows you to see the time under your mouse cursor whenever you move in the diary.
Highlight the current time in the diary	Selecting whether you would like to have the current time highlighted in the appointment diary.
Update Appointment Book Every # Minutes	<p>This should be used if Comart Dental V5 is on a network and other users are editing the same diary. It is the length of time in minutes before your diary checks everyone else's diary and adds any new appointments from their diary into your own.</p> <p>If you are not on a network, or you are the only person updating appointments, set this option to zero.</p>
Configure Diary Colours for Providers	If you want to colourise the diary and give each provider their own colour you can do so using this function. Both the providers working hours and lunch break can be colour modified making it easier to see who is who in the diary.
Update Finished Status	When you add a person to the waiting room, once the dentist has seen the patient and the patients sessions finishes, the status of the corresponding appointment will automatically change to whatever is put into this box.
Play Sound When New Patient Arrives	If you want a sound to play whenever a patient is added to the waiting room, tick this box. The provider will then hear an alarm as well as see the patient tag when the patient is placed into the waiting room.



Tip: Note that some of the diary settings will not come into effect until you have closed down the diary and re-opened it.

The Appointment Editor

The Appointment Editor lets you create/view/edit all of the information about an appointment. Double-clicking on any appointment slot in the diary will show the Appointment Editor.

Appointment Editor - [Adding New]

<Add New Appointment>

Save & Close Abandon Save

Appointment Details

This appointment takes place on: Fri 08 / 10 / 2010 [All day]

The appointment is from: 15 : 40 To: 16 : 00 20 Mins

The appointment is for: 17198 Mr Oliver Cohen

Payor: Date of Birth: 01/05/1959

Home Tel: Mobile: 07951774431

Work Tel: Recall Date: 14/02/2010

Dentist: Mr Michael Abbot Recall Date: 09/11/2008

Hygienist: Alerts:

The treatment to be given is: Examination

The staff member involved is: Mr Michael Abbot

The appointment location is:

The appointment category is: Private

The appointment status is: Pending

☒ Send a reminder to the patient about this appointment

☒ Automatically generate a description based on the above information

Description:

Set Description Format

Previous Appointments

Status	Date	Start	Staff	Treatment
Pending	29/09/2009	16:00	Mr Michael Abbot	
Pending	08/09/2009	15:20	Mr Michael Abbot	
Pending	25/08/2009	14:50	Mr Michael Abbot	
Pending	18/08/2009	14:30	Mr Michael Abbot	Bridge Prep
Pending	18/08/2009	14:00	Mr Michael Abbot	

Planned Treatments (Double-click the appointment below to add it to the appointment store)

Appointment	Date	Category	Length	Interval	Provider	Price
-------------	------	----------	--------	----------	----------	-------

Common Tasks for this Appointment

Print Appointment Confirmation Find Available Space Add New Patient Add Family Members Open Patient

Appointment Editor - Fields

Date, Start, Finish	This shows the date, start time and finish time of an appointment. If you created the appointment from the Diary, these values will already be set for you, but you can of course change them from here.
Appointment is for	The patient (or contact) that will be coming to your practice for this appointment. Once selected, some useful information regarding the patient will appear just below, such as the patients DOB, telephone numbers and usual dentist etc.
Treatment Category	The type of treatment that the patient is coming in for. These are generic descriptions of various treatment types, giving the dentist an idea of the type of procedure to be carried out. You can attach generic amounts time of time to each category so when it is selected, it automatically updates the appointment length to the time allocated.
Staff Member Involved	The staff member (normally the dentist or hygienist) who will handle this appointment.
Appointment Location	The room or place where the treatment will be given.
Appointment Category	The category for this appointment that can be configured to colour the background of the appointment in the diary (see "Working with Categories" for more information).
Appointment Status	The current status of the appointment. Again this can be configured to colour the border of the appointment in the diary.
Description	This is the brief description of this appointment which is displayed in the diary. If the "Automatically generate a description" checkbox is ticked then a description for this appointment will automatically be created from the information you give the editor.
Set Description Format	This will display a dialogue window that allows you to configure which fields you would like to see in the patient's appointment description. You can also change the order in which these fields appear.
Previous Appointments	This grid displays all of the patient's previous appointments.
Planned Treatments	This grid enables you to quickly see the patients planned treatments by course and by appointment. A total length

	of time is also shown enabling you to see the length of time the appointment should be for as well as an estimated cost.
NHS Exemptions Tab	NHS Only – If you have the NHS module activated you will also see an NHS exemptions tab. This allows the receptionist to put any exemptions into the appointment before they arrive. When the NHS claim is created, it will automatically use any exemptions entered into this area.
Notes	Any additional notes you feel are appropriate for this appointment. These notes can be viewed along with the description within the diary if set to do so in the diary settings (see "Changing the Diary Settings" for more information). Note: You can also set templates for your appointment notes, by selecting the 'Add' button.
Referred by (Only when booking Hygiene Appointments)	An additional drop down box becomes available when booking a Hygiene appointment. You will find this underneath the "Appointment Status" box. This enables you to input which dentist has referred the patient to the hygienist.

Appointment Editor – Common Tasks

In the common tasks area you are able to print out an appointment confirmation form in various different sizes including A4, A5, receipt size roll, and appointment card. This can be given to the patient as a record of the appointment.

You can also launch the "Find an Appointment Slot" function from here which will update the details on the appointment once selected.

If the patient you are speaking to is not yet entered onto the system, you can Add a New Patient from here as well. Once the patient record is saved and closed the patients details will automatically be populated on the appointment form.

Add Family members is a useful facility if you have defined the relationships in a family. Once you have entered the details of the first family member into the appointment, select this link and it will allow you to select various other family members as well. When you press the save button, the next family member details will be entered onto the form. Once those details are entered select "Save" again to move onto the next family member, and so on...

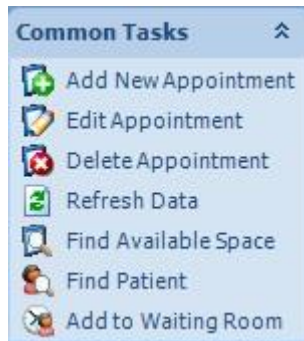
It is possible to open the currently selected patient instantly by selected "Open Patient".

Working With Appointments

Creating a New Appointment

Appointments can be created in several different ways.

- Double click on an empty slot.
- Right-click on a slot and select "Add Appointment" from the menu
- Click once on an empty slot and choose "Add New Appointment" from the "Common Tasks" menu in the Side Panel:



Changing Appointments

An appointment can be moved simply by dragging it with the mouse and releasing it on the desired slot.

To change the appointment provider, just drag the appointment and release it on a timeslot in their column in the diary.

You can drag an appointment onto the diary calendars to change the date of the appointment to any date you like.


Also, when you hover over the lower border of an appointment, a resize bar appears. Hold down the left mouse button to quickly resize the appointment which will increase / decrease the appointment length.

The best thing is to experiment to get the hang of it!


Finding An Appointment Slot

Rather than searching through the diary yourself, you can get Comart Dental V5 to quickly present you with available appointment slots using the **"Find Available Space"** function found in the common tasks area on the left side panel (see above picture). Selecting this option will display this window:

Find Next Available Appointment ✕

 Find Appointment Slot

Appointment Requirements

 Find an appointment between and

The first appointment is with for Minutes

The second appointment is with for Minutes

Maximum wait time between appointments

Only search for appointments on the following days ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri
☐ Sat ☐ Sun

and at the following times ☒ All Day ☐ Morning ☐ Afternoon

These fields are described in the table below:

Find an Appointment Between	The date range from and to when the person requires their appointment.
The First appointment is with	The staff member this appointment needs to be with. Any staff member may be selected.
The Second appointment is with	(Optional) The staff member a second appointment needs to be with, if required.
For minutes	The total amount of time required for the appointment.
Maximum wait time between appointments	The maximum wait time between the first and second appointment.
Only Search for Appointments on	Tick which days of the week are acceptable to the person for an appointment.
At the Following Times	Whether the appointment can be at any time in the day, or if it should be in the morning or afternoon.

Clicking “Find” will present you with a translucent floating window that shows you every space available matching your criteria. Clicking on any of the suggested slots jumps straight to that area in the diary. You can move the floating window around by clicking and holding the title bar, if it gets in the way whilst you find the slot.



Awaiting Cancellation List

Sometimes you may not be able to find an appointment slot for someone, but they may be prepared to accept a last minute appointment if a cancellation happens. Comart Dental V5 allows you to place individuals on an "Awaiting Cancellation List".

Select "Appointment Diary" and then "Awaiting Cancellation List" on the main menu at the top of the screen. The following window will be displayed:

Persons Awaiting Cancellation

Persons Awaiting Cancellations

Save & Close Abandon Print

Awaiting List Suggested Availability

The name of the person waiting is

Appointment must be between 31 / 01 / 2019 and 31 / 01 / 2019

Appointment should be with <Any Dentist> for 5 Minutes

Only on the following days only

☐ Mon ☐ Tue ☐ Wed ☐ Thu
☐ Fri ☐ Sat ☐ Sun

Comments

Add Awaiting Cancellation Details to the List

Name	Length	Start Date	End Date	To See	Days Required
------	--------	------------	----------	--------	---------------

Edit Details Remove Person

This dialogue is comprised of two tabs.

The "Awaiting List" tab is very similar to the "Find Available Space" functionality described above. Simply add the person's appointment requirements and then press the "Add Awaiting Cancellation..." button. The person will then be added to the list at the bottom of the window.

Storing Appointments

If a patient needs to move their appointment for some reason, it can be useful to store the appointment details somewhere temporarily whilst you look for a suitable place in the diary.

At the bottom right of the diary is the Appointment Store:



Appointment Store

Code	Name
00012	Mrs Michelle Hulse
00009	Mr Ian Stokes
00013	Master George Hulse

Remove

To move an appointment into the appointment store, you can either right click on an appointment and select Store > Add to Store from the pop up menu, or you can simply hold the left mouse button down on the appointment and drag and drop it into the store area. To move or copy an appointment from the store to a location in the diary, simply drag and drop it back to the diary. When you do this you will be given two options:

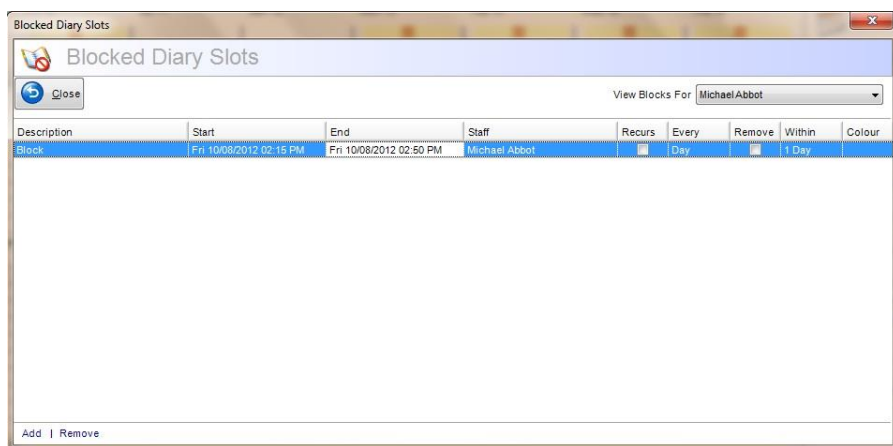
- Move – This deletes the original appointment you copied to the Appointment Store from the diary
- Copy – This leaves the original appointment you copied to the Appointment Store in the diary as it is

A new appointment is created in the slot you dropped it onto, with all of the details the same as the original.

Blocking the Diary

You may wish to block certain times in the diary so that appointments cannot be booked into those areas. These may be recurring blocks that happen every day or every week, or may be a one off, such as attending a day course. You can block areas of the diary using the “Block Appointment Slots” function within Comart Dental V5.

When you are in the appointment diary, the main menu bar will display an “Appointment Diary” option. Click this and then “Manage Appointment Blocking”. The following window is displayed:



This screen displays the full list of current blocks set up in your diary by provider. Add or remove current blocks with the links at the bottom. Clicking “Add” displays this window:

The screenshot shows a window titled "Block Diary Slot". At the top, there are "Save & Close" and "Abandon" buttons. Below this is a section titled "Diary Block Details" with a calendar icon. It contains a list of staff members with checkboxes: "Miss Gemma Greaves" (unchecked), "Dr Joel Johnson" (checked), "Dr Amy Jones" (unchecked), and "Dr Michael Smith" (checked). Below the list is a "Select All" link. There are two date pickers: "Between the dates of" with "01 / 04 / 2017" and "02 / 04 / 2017", and "Between the times of" with "09 : 30" and "16 : 30". There is also an "All Day" checkbox. A text field for "Reason for Blocking" contains "Staff Training". At the bottom, there are checkboxes for "This block should recur every" (checked) and "Remove block when within" (unchecked). There are also dropdowns for "Day" (set to "Day") and "Days" (set to "1"), and a "Colour" dropdown with a red color swatch.

These fields are described in the table below:

Block Appointment Slots For	The staff member(s) whose diary you wish to block.
Between the Dates of	The date range that you wish to apply the appointment block to.
Between the Times of	The time period in the diary that you wish to block.
Reason for Blocking	Description of why the block exists.
This Block Should Recur Every	The recurring interval (if you have specified a date range) that you want this block to occur on. This is optional and blocks don't have to recur. (See note below)
Remove Block When Within	Remove the block when the current date reaches the given number of days prior to the block. This is useful for keeping slots available for emergency appointments and removing them automatically when within the specified time period.
Colour	Click the colour picker icon next to the colour displayed, to choose a different colour for the block in the diary.

Note: When selecting a recurrence of every “Week”, “2 Weeks” or “Month”, the day of the week used is the one selected in the first date field of “Between the dates of”. E.g. to recur an appointment block for every Monday at 9:00 – 09:30 for 3 months:

- Next to “Between the dates of”, in the first date field, choose the first *Monday* that you want the block to apply to. In the second date field choose a date in 3 months’ time.
- Next to “Between the times of”, enter 09:00 and 09:30 in the time fields.
- Type a reason in the box provided
- Tick the “This block should recur every” and select “Week” from the drop down.
- Click “Save and Close” to finish

Colourizing the Diary

The colour scheme of the diary can be completely customised. You can Colourize sections of the diary to make specific areas stand out to users.

To set these colours, click on the “Appointment Diary” menu option in the main menu bar. Select “Colourize Diary Sections”.

You can “Add”, “Edit” or “Remove” colourized sections here, by using the links at the bottom left of the window.

Clicking “Add” opens the following window:

Additional Appointment Diary Colours

Close

Start 14:30

Appointment Diary Colour Details

Save & Close Abandon

Diary Day Details

Colourize Diary For Michael Smith

On the Following Day Monday

Start Time 00 : 00

End Time 00 : 00

Diary Section Colour

Add | Edit | Remove

You can colourize the diary for specific Providers and specific times by adjusting the options. Clicking the Colour Picker icon next to Diary Section Colour allows you to choose the colour you would like to colourize the diary section with.

The Appointment Right-Click Menu

Right-clicking on an appointment in the diary opens a context menu that has useful additional functions.

Add Appointment and Edit Appointment

These options will open the Appointment Editor for that slot.

Delete Appointment

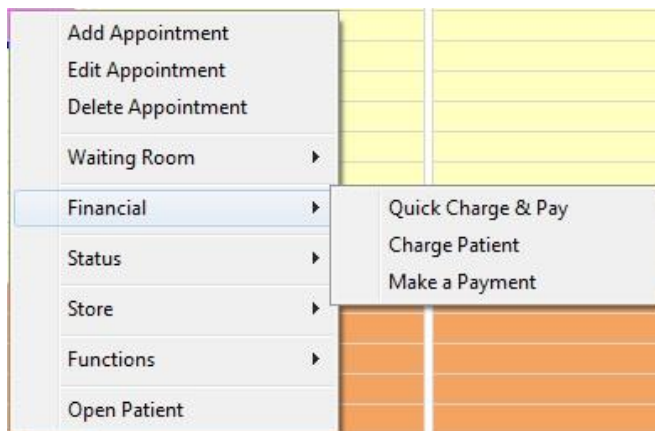
Removes an appointment in the slot. Note: This should not be used for cancelling appointments, only if the appointment was entered by mistake.

Waiting Room

Click “Patient Arrived” to add the patient to the virtual Waiting Room (See: **The Waiting Room**).

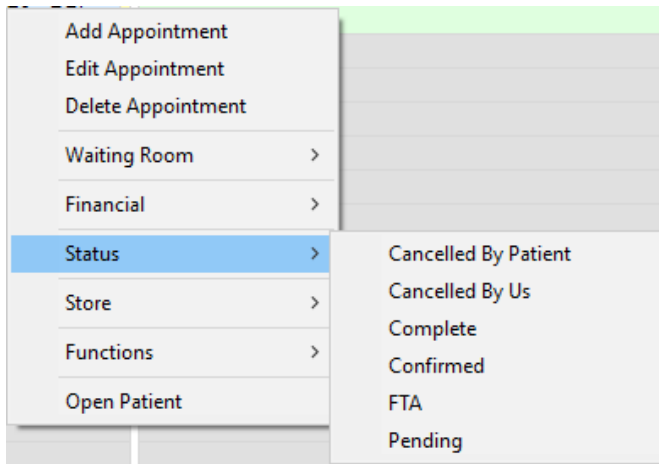
Financial

- Quick Charge & Pay – A shortcut to quickly create an invoice for completed treatments and open the payment window. Note: You cannot add items or make alterations to an invoice when using this. If you need to modify or check an invoice before it is raised, use the separate functions.
- Charge Patient – Creates an invoice for completed treatment and opens the invoice window for you to alter it before saving.
- Make a Payment - Opens the payment window to take a payment.



Status

Set the appointment to the selected Appointment Status (See: **Appointment Category/Status** to change these).



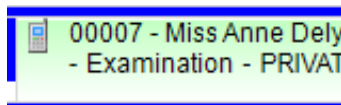
Store

Click “Add to Store” to add the appointment to the Appointment Store (See: **Storing Appointments**).

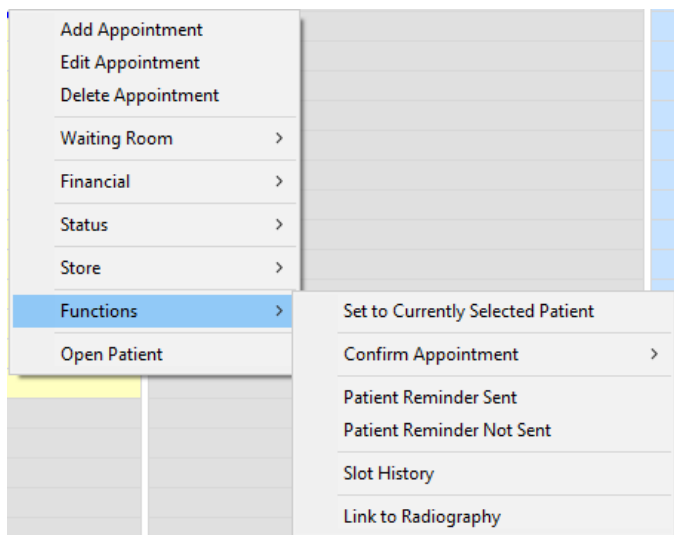
Functions

Miscellaneous functions for the slot:

- Set to Currently Selected Patient – sets the patient booked in this slot as the currently selected patient. When adding an appointment it will default to this patient so you don’t need to search for them.
- Confirm Appointment – Click “Email” or “SMS” to send an appointment confirmation to the patient by email or SMS respectively.
- Patient Reminder Sent – records that an appointment reminder has been sent to this patient and adds the reminder sent icon to the appointment slot:



- Patient Reminder not Sent – removes record that an appointment reminder was sent to this patient and removes the reminder sent icon from the appointment slot.
- Slot History – shows whether there were any appointments previously booked into this slot, but have since been removed.
- Link to Radiography – shortcut to the open the current patient in your Radiography program.



Open Patient

Opens the patient or contact record.

Appointment Category / Status

The Appointment Category and Appointment Status editors are slightly different to the ordinary Category Editors (see "Working with Categories"). Here's a screen shot of them both:

The screenshot shows two windows side-by-side. The left window is titled 'Appointment Category Editor' and contains a table with two columns: 'Description' and 'Colour'. It lists 'Emergency Appointment' (red), 'NHS' (blue), and 'Private' (green). The right window is titled 'Appointment Status Category Editor' and contains a table with columns: 'Description', 'Cancel', 'Reason', 'Colour', and 'Default'. It lists various appointment statuses with their corresponding settings, such as 'Cancelled By Patient' (checked), 'Cancelled By Us' (checked), 'Complete', 'Confirmed', 'FTA', and 'Pending'.

Description	Colour
Emergency Appointment	Red
NHS	Blue
Private	Green

Description	Cancel	Reason	Colour	Default
Cancelled By Patient	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Red	<input type="checkbox"/>
Cancelled By Us	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Blue	<input type="checkbox"/>
Complete	<input type="checkbox"/>	<input type="checkbox"/>	Green	<input type="checkbox"/>
Confirmed	<input type="checkbox"/>	<input type="checkbox"/>	Black	<input type="checkbox"/>
FTA	<input type="checkbox"/>	<input type="checkbox"/>	Black	<input type="checkbox"/>
Pending	<input type="checkbox"/>	<input type="checkbox"/>	Blue	<input checked="" type="checkbox"/>

The Appointment Category colour is shown as the appointment background, whilst the status colour is used for the border. For example, you might assign a colour to "Surgical" and "Non-surgical" appointment categories and a colour for "pending" and "complete appointments". You can then quickly identify both the category and the status of any appointment simply by looking at them in the diary. You can assign as many categories and status' as you wish and choose whatever colours you like. These colours make it easier for you to see clearly the category and status of any appointment in the diary without having to open the appointment.

To change the colour of a category or status, click on the colour next to the category you would like to change. A "..." button is shown, click this button to display a colour picker and set any colour you like.

The screenshot shows a 'Colour' picker dialog box. It features a grid of 'Basic colours' and a section for 'Custom colours'. A large color wheel is visible, and a color bar on the right. Below the color wheel, there are input fields for 'Hue', 'Sat', 'Lum', 'Red', 'Green', and 'Blue'. The 'Hue' field is set to 160, 'Sat' to 0, 'Lum' to 240, 'Red' to 255, 'Green' to 255, and 'Blue' to 255. There are buttons for 'OK', 'Cancel', and 'Add to Custom Colours'.

The Waiting Room

Comart Dental V5 houses its own virtual waiting room, which should mirror the actual waiting room of your practice. You can see who is in your virtual waiting room by selecting the "Waiting Room" tab from the appointments diary screen shown below...



Waiting Room

Status	Arrived	Patient	Pvr	mins
Arrived	10:22	Ruth Thickpenry	M.S	1
Arrived	10:22	Graeme Cartwri...	M.S	0

The waiting room tab has the following features...

Status	This is the status of the patients visit. When they are first put into the waiting room they are marked as "Arrived", once they go in to see the provider and their patient record is opened, they will be marked as being "In-Session". Finally, when their patient record is closed they are given a finished status.
Arrived	This is the time at which the patient arrived. Any patient who has been waiting longer than the permitted waiting time will be highlighted in red. In this way you can see at a glance which patients have been delayed longest. You can change the maximum length of permitted waiting time for your practice in the practice setup area (see "Managing Your Practice Setup" for more information).
Patient	The name of the patient.
Provider	The member of staff that the patient is currently waiting to see.
Minutes	This shows the actual amount of time that the patient has been waiting to be seen.
Edit Appointment	Immediately jumps to the appointment in the diary of the currently selected patient and opens that appointment.
Remove	Removes the patient from the waiting room.
Open Patient	Opens the patient record so that you can access the functions within.



Tip: You can quickly open the patient record by simply double-clicking the patient in the waiting room.
If you do not remove all of the patients from the waiting room by the end of the day, they will automatically be removed by the time you come in the following day, as it is presumed you won't have patients waiting overnight!

Adding a Patient to the Waiting Room

To add a patient to the waiting room, you have two options:

- Select the appointment and choose “Patient Arrived” from the Common Tasks menu in the Side Panel.
- Right click on an appointment and Select “Waiting Room” then “Patient Arrived”.

When a patient is added to the waiting room, the dentist/provider is notified and can call the patient into their room when ready.

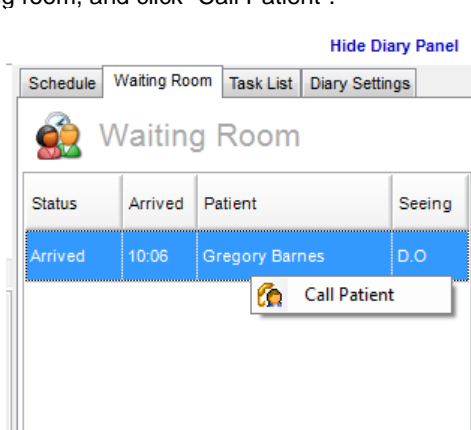
In order to assist you, if a patient has multiple appointments on the same day, when you add a person to the waiting room, Comart Dental V5 will ask if you want to add the other appointment to the waiting room as well.



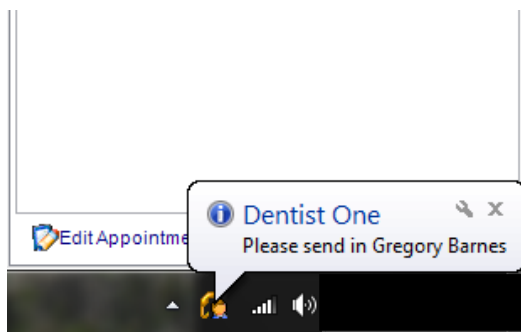
Tip: You can only add a person from a single appointment once, so don't worry if you can't remember whether you've added them yet, just add them anyway and if they are already in the waiting room the add will be ignored.

Calling a Patient Through to Surgery within the Waiting Room

The dentist/provider is notified by a message pop up on the screen, that their patient has arrived. To notify reception to call a patient through, the provider should bring up the waiting room tab in the appointment diary then right click on the patient in the waiting room, and click “Call Patient”.



After the provider has called the patient, a message will then pop up at the bottom of the Receptionist's screen, asking them to send the patient through to surgery. The process is built to enable easy and quick business. The staff will not have to run around the Practice giving messages; they can communicate in a professional way.

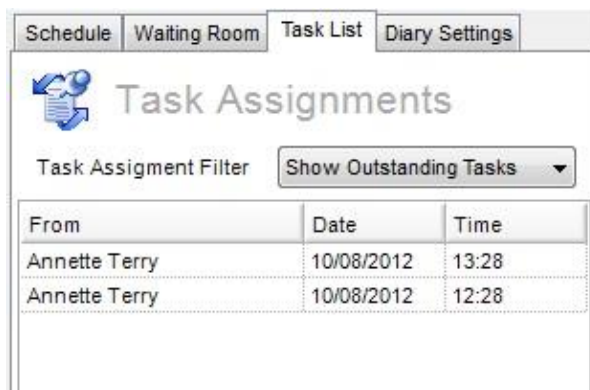


Task List

Assigning Tasks

Tasks can be assigned to either yourself or to other members of staff. This helps everyone remember exactly what they are supposed to be doing.

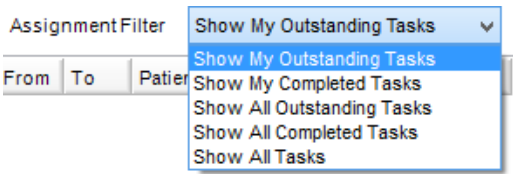
You will find the "Task List" on the Appointment Diary screen:



The buttons underneath the Task Assignments window allow you to create a new task, delete a task or edit a task with the Task Editor.

Double-clicking on a task will also show the task editor, so that you can change the task details.

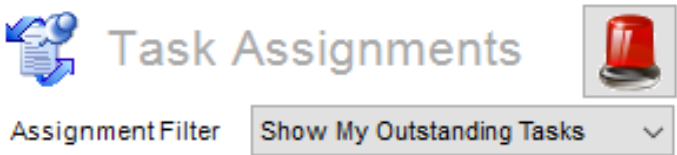
The drop-down box named ‘Assignment Filter’ enables you to choose which Tasks you wish to have visible in the Task Assignments Section.



Emergencies

An “Emergency” button (red siren icon) is found in the Task List. In the event of an emergency, you click the emergency button (image below) an urgent task will immediately be broadcast to all users with the message:

“An emergency has been declared by xxxxxx. Please attend as soon as possible.”



The Task Editor

The Task Editor lets you create/view/edit all of the information about a task in your task list.

A screenshot of the 'Task Editor' dialog box. The title bar says 'Task Editor' with a close button. The main area has a header 'Task Editor' with a blue icon. Below is a section 'Assign To' with a list of names: Amy Jones, Gemma Greaves, Joel Johnson, Michael Smith (checked), and Susan Berry. To the right of the names are status indicators: '-' for Amy Jones, Joel Johnson, and Susan Berry; 'Online' for Michael Smith. Below the list are three radio buttons: 'Select All', 'Select Logged On', and 'Select None'. Below that is a 'Message' field with a dropdown menu showing 'BOOK APPOINTMENT' and a green icon. Below the message field is a text area containing the text 'Call patient to book appointment'. Below the text area is a 'Patient Link' field with the text 'Lampert, Peter Master' and a magnifying glass icon. Below the patient link field are three checkboxes: 'Display task as soon as convenient for the recipient', 'Display task urgently', and 'Mark this task as private'. Below the checkboxes is a date and time selector with the text 'Or Assign this task on' followed by a date field showing '01 / 01 / 2017' and a time field showing '13 : 00'. At the bottom are two buttons: 'OK' and 'Cancel'.

Assign To	These are the members of staff that this task will be assigned to.
Message	A brief description of the task that has to be done. Note that by clicking the icon to the side of the drop down you can set up pre-defined messages for regularly transmitted messages. You can then quickly select any of these messages using the drop down box.
Patient Link	If this task has to do with a particular patient, you can select the relevant person using the find feature.
Assign Task Immediately	If you want the task to be done immediately simply tick this box, otherwise you will be asked for a time.
Display task as soon as convenient	In most cases, you would use this function. When checked, the task will show up on the recipients screen as soon as they have closed screens that require user input (E.g.: Payments, Invoices)
Display task immediately	You would tick this box if you would like your task to be assigned immediately, and to show up on the recipients screen instantly.
Assign On	If the task is not being done immediately, you can assign a future date and time as to when you would like the task to appear.
Make this Task Private	Tasks may be marked private and may only be viewed by those staff members to whom the task has been assigned. Only the person who created the task can make the task private or viewable by all.

Once a task is added, the task will appear in the task list of the individual to whom that task is assigned.

When the time for a due task arrives, the appropriate staff member will receive a message appear on their screen with the task details:

Task Assigned

Task Assigned

You have a task assigned to you.

From: Smith, Michael

Created: 31/03/2017 03:33 PM

Task: Call patient to book appointment

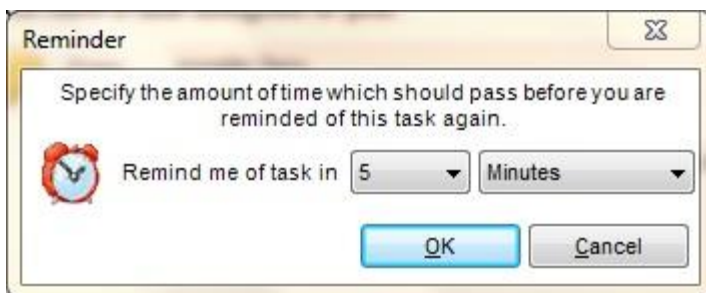
Task relates to patient: 00015 Lampert, Peter Master

Reply to Sender Remind Me Later Dismiss

When a task reminder appears with a 'Patient Link', you can instantly open that patient record by using the 'View' button. You will find the 'view' button next to the patient name.

You have three options:

- Reply to Sender - creates a message to send back to the sender.
- Remind Me Later – postpone the task, to be reminded after the specified period.



- Dismiss – You will no longer be reminded about this task.



Tip: By assigning a task to yourself, you can use the task assigner as a means of reminding yourself to perform important jobs.

The Patient Editor

The patient editor lets you create/view/edit all of the information about a patient. There are various ways that you can access the Patient Editor, but probably the most common way will be by double-clicking on a Patient in the Patients grid.

The screenshot displays the Patient Editor for a patient named Anne Delys Miss. The interface includes a top navigation bar with tabs for Contact, Patient, Charting, Perio, Visual Notes, Appointments, Accounts, Recalls, Documents, Correspondence, References, Education, and Consent. The main content area is divided into sections for Contact Information, Address & Contact Details, and a large empty space for patient notes or charts. The right sidebar contains Patient Details, Patient Photograph, Patient Account Status, Family Member Quick Links, and Patient Related Tasks.

Contact Information

Title	First Name	Middle Name(s)	Last Name
	Anne	Delys	Miss

Address & Contact Details

Address	Home Tel	Business Tel
212 Larch Road	02084501919	
Chislehurst	Mobile	Work Detail
London	07961 822713	
County	Fax	Send SMS
PostCode	Email	
SE21 7HS	anne@delysdentals.co.uk	
Country	Year of Birth	
	1980	

Common Tasks for this Patient

- Create Plan
- Change Patient
- Make a Payment
- Take an Appointment
- Track Treatments
- Create Quick Document
- Add Recall Note
- Take Invoice
- Link to Radiography
- Patient Education

Each patient record has 14 pages in total:

(Note: Some of these pages are available only if subscribing to the additional module)

- **Contact** Contact information for the patient
- **Patient** More personal information about the patient
- **Charting** Dental charting of various treatments administered to the patient
- **Perio** Periodontal charting of the patient's oral health.
- **Visual Notes** Notes made along with pictures of teeth that are drawn on by the provider as a visual aid.
- **Appointments** A list of all of the patient's previous and future appointments.
- **Accounts** A history of all of the patient's financial transactions.
- **Recalls** Recall data, such as the next recall date, along with a history of all documentation sent to the patient to recall them for further treatment.
- **Documents** Stores references to scanned images and forms the patient has filled out.
- **Correspondence** Maintains a list of all correspondence sent to the patient including letters, SMS text messages and e-mails.

Patient Editor – Contact Details

This page is fairly self-explanatory since it contains the patient's name, address, telephone numbers, e-mail address etc. There is also a notes field which allows you to enter any other information about the patient that you wish. These are permanent notes and once added, cannot be erased.

Patient Editor – Patient Details

00799 Jackson, James Mr - 05/10/1961 - Age 55 yrs 6 mths

00799 Jackson, James Mr

Save & Close Abandon Print Save

Contact Patient Charting Perio Visual Notes Appointments Accounts Recalls Documents Correspondence Education

Patient Information

Patient Details

Patient Code: 00799

Sex: Male

DOB: 05 / 10 / 1961 55 yrs 6 mths

Patient Joined: 05 / 05 / 2012

Previous Name:

Marital Status:

Occupation:

How Patient Found Us:

Category/Status

Patient Group:

☒ Active

Patient Care

Dentist: Smith Dr Michael

Hygienist:

Referred By:

Referred To:

GP:

☐ Block Future Appointments for this Patient

Medical Details

☐ Infectious

☐ Medical Alert

Medical History:

Social History:

Preferred Anaesthetic:

Correspondence

Document Recipient:

Preferred Contact Method: E-Mail

Mailshot Categories:

☐ Unsubscribe

☐ COSMETIC

☐ FACIAL

☐ IMPLANTS

☐ ORTHODONTIC

Patient Details

☐ Block Future Appointments for this Patient

Common Tasks for this Patient

Create Estimate Create Plan Charge Patient Make a Payment Raise Invoice

Track Treatments Create Quick Document Add PopUp Note Make an Appointment Link to Radiography

Patient Education

Last Updated by Dr Michael Smith on 28/02/2017 19:54:51

Patient Details

Patient Photograph:

Add Photograph | Delete Photograph

Quick Add Family Member

Define All Family Relationships for Patient

Patient Account Status

Actual Account Balance: £0.00

Estimated Amount Owed: £0.00

Patient Related Tasks



Task Filter: Show My Outstanding Tasks



From Assigned To Date

Add Task | Edit Task | Delete Task

The patient details screen contains more personal information about your patients. Most of the fields here are self-explanatory but some of them do have special functions...

Patient Code	Every patient must be assigned a unique code. Comart Dental V5 can automatically allocate a number to a new patient when they are input on the system for the first time, or you can assign the code yourself. This setting can be changed in the set-up of the program (see "Managing Your Practice Setup" for more information). The software will also check for duplicates as it's obviously not a good idea to have more than one patient with the same code! If you attempt to assign a code that has already been used by a patient you will be warned about it when you try to save the record.
Active	A patient becomes active when their record is first created, however patients may move away or for other reason cease to be your clients. If you no longer want to see patients appear in the various program lists, simply untick this box to mark them as inactive. You can also specify an inactive

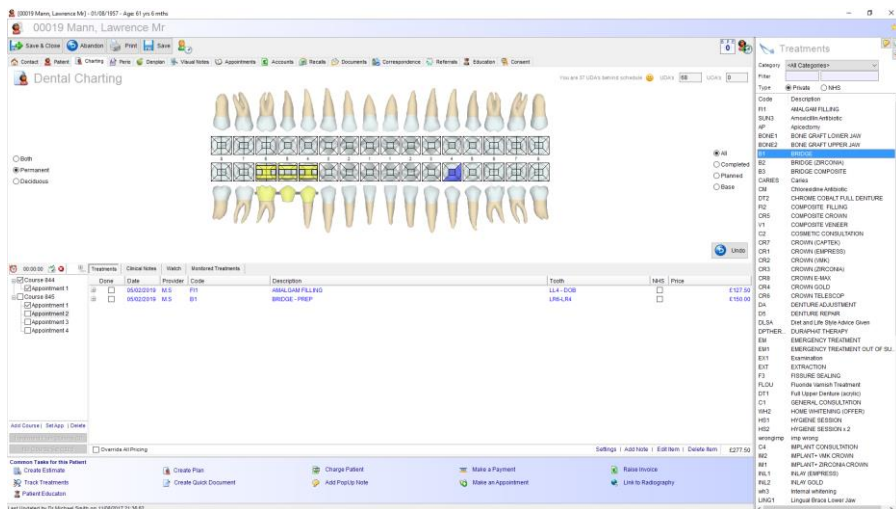
	reason in the drop down box next to it.
Dentist/Hygienist	<p>You can allocate the patient's usual dentist and hygienist in these areas to save you having to specify these every time throughout the program e.g. when you come to create an appointment. These are just defaults though, and you can override them at any time.</p>
Infectious	<p>If the patient has some sort of infection you can tick this box. When you do so, the description box next to it will become enabled, allowing you to enter a description of the infection.</p> <p>When the box is ticked a flashing "Infectious" icon will appear at the top of the patient record so it's obvious at all times that they have an infection. To instantly see a description of the infection simply hover the mouse over the icon and the description will appear.</p>  <p>Please note you can also set up infectious templates using the yellow folder button next to the infectious box and attach your own icon to that template. Using the multiple select buttons just above the yellow folder you can choose which templates you want to apply to this patient and the next time you open the record, the icons you have chosen will appear in the top right hand corner of the screen next to the bookmark icon.</p>
Medical Alert	<p>Very similar to the previous functionality, this check box relates to the persons medical condition. If there is an important medical condition that needs to be recorded, simply tick this box and add a description of the medical alert.</p> <p>When the box is ticked a flashing "Medical Alert" icon will appear at the top of the patient record.</p>  <p>Please note, you can set up medical alert templates with icons in the same way as the infectious templates described above.</p>
Medical History	<p>Allows you access to the user defined medical history form. (see "Designing the Medical History Form" for more information).</p>
Document Recipient	<p>The document recipient is the person that will actually receive any mail you send out to this patient. Obviously if your patient is a child, you want to be able to send any letters etc. to the mother or father. Using this field you can assign a patient or contact who will receive your mail. If the patient is already the person who should receive any mail you should leave this field blank.</p>

Preferred Contact Method	The method by which this patient normally wishes to be contacted. This is useful for when you are sending appointment reminders and recalls so that the patient is notified in the manner they have requested.
Mailshot Categories	If you want to send mailshots to your patients, you can create mailshot categories by pressing the yellow folder next to this box. Your categories will then be listed and you can tick which mailshot categories each patient is interested in. This enables you to use the "Create Mailshot" facility in the program and send your mailshot to only those patients interested in the particular category or categories you choose.
Default Price Schedule	Comart Dental V5 has the ability to let you create any number of price schedules. This allows you to group certain price "types" together. Usually the one price schedule should suffice for your practice, however if you need more, they are there. This field enables you to set the default price schedule that will be used to calculate the patient's invoices.
Default Price Level	Each price schedule has three price levels 1, 2 and 3. This again allows you to allocate three different prices to each treatment your practice administers. For example, you may have one price for a child, another for an adult and another for an OAP. This field enables you to set the default price level that will be used to calculate the patient's invoices.
Payor	Quite often the patient is not the one who is paying the bills so this field enables you to set the default payor. Once you put either another patient or a contact in this field, every time the patient is invoiced for a treatment, the invoice will actually go to the payor. Likewise, whenever a payment is made from this patients' record, the person making the payment will default to the payor. If the patient is the person that is paying for his/her own bills leave this field blank.
Credit Limit	<p>This is the patients' credit limit. It is the amount that they are permitted to have financially outstanding before a warning is given. When a person goes over their credit limit, a flashing icon will appear at the top of the patient record, clearly indicating that this patient needs to make a payment.</p> <p>You can always see how much the patient owes by hovering your mouse over the icon.</p> 
 Tip: Note that whenever you read about defaults, they are simply that, just	

defaults. They are the setting that any field will default to at first, however all defaults can be overwritten when used.

Patient Editor – Charting

The dental charting screen allows you to record all of the dental treatments administered to the patient.



The first thing you will see is the graphic representation of the patient's dental condition.

The teeth themselves are broken down into surfaces, enabling you to carry out some treatments on a surface-by-surface basis. A more detailed description of how you administer treatments to these teeth will be given a little later on.

If you hover your mouse over any tooth, a full description of all of the treatments that are planned or completed will appear for that particular tooth, just below your mouse cursor.

To the left of the teeth graphic are the following options:

Both	Allows you to view both permanent and deciduous teeth at the same time.
Permanent	Only displays the permanent teeth.
Deciduous	Only displays the deciduous teeth.

Please note that the program will remember how you like to view the chart for this patient, therefore a child will always show you “Both” for example and a different adult patient will always show you just “Permanent” depending on what you have selected in the past.

To the right of the teeth graphic are the following options:

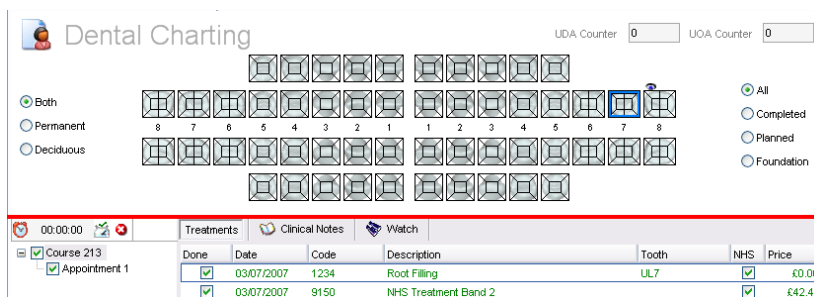
All	Displays all of the treatments, both completed and planned, that have been recorded for this patient.
Completed	Displays only treatments that have been completed for this patient.
Planned	Displays only treatments that are planned for this patient.
Foundation	Enables you to add base treatments to the patient's teeth. This is the dental condition of the patient when they join your practice for the first time. Foundation treatments are considered to have already occurred and therefore always appear as completed and charged in the patient treatment list.

Expanding the Dental Chart View

The teeth graphic can be expanded or reduced in size to switch between a compact or larger view. The smaller view shows only the top surface of the teeth, whereas the larger view shows a side profile of the teeth and the roots.

To adjust the size:

- Hover the mouse over the line separating the teeth section from the grid below. In the image this dividing line is represented by a red line:



- When your cursor is hovering in the correct location, the mouse cursor will be replaced with a resize cursor:



- When you see the resize cursor icon, press and hold the left mouse button and drag to resize the views.
- The width of the view can also be resized by dragging from the dividing line between the teeth and the treatments. Here represented by a red line:

The screenshot shows the 'Dental Charting' software interface. At the top, there are counters for 'UDA Counter' and 'UOA Counter', both set to 0. Below the title, there are radio buttons for 'Both', 'Permanent', and 'Deciduous', with 'Both' selected. The main area displays a dental arch with 16 tooth positions, numbered 8 to 1 on the left and 1 to 8 on the right. Each position has a small grid icon. Below the arch, there are three tabs: 'Treatments', 'Clinical Notes', and 'Watch'. The 'Treatments' tab is active, showing a table with columns: Done, Date, Code, Description, Tooth, NHS, and Price. The table contains two rows of data.

Done	Date	Code	Description	Tooth	NHS	Price
<input checked="" type="checkbox"/>	03/07/2007	1234	Root Filling	UL7	<input checked="" type="checkbox"/>	£0.00
<input checked="" type="checkbox"/>	03/07/2007	9150	NHS Treatment Band 2		<input checked="" type="checkbox"/>	£42.40

If you have a large enough screen (normally 17" or preferably 19") the following view of the teeth will appear...

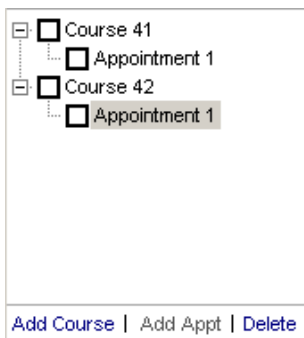
This screenshot shows the same 'Dental Charting' software interface but with a larger, expanded view. The dental arch is now larger, and the teeth are more detailed. The 'Treatments' tab is still active, showing a table with columns: Done, Date, Code, Description, Tooth, NHS, and Price. The table contains three rows of data.

Done	Date	Code	Description	Tooth	NHS	Price
<input checked="" type="checkbox"/>	03/07/2007	1234	Root Filling	UL7	<input checked="" type="checkbox"/>	£0.00
<input checked="" type="checkbox"/>	03/07/2007	imp01	Implant	LR6	<input type="checkbox"/>	£10.00
<input checked="" type="checkbox"/>	03/07/2007	4006	Bridge	UR7-UR5	<input type="checkbox"/>	£200.00

As you continue to expand the view, you'll find that the teeth will grow even bigger in size, enabling you to see the treatment chart more clearly.

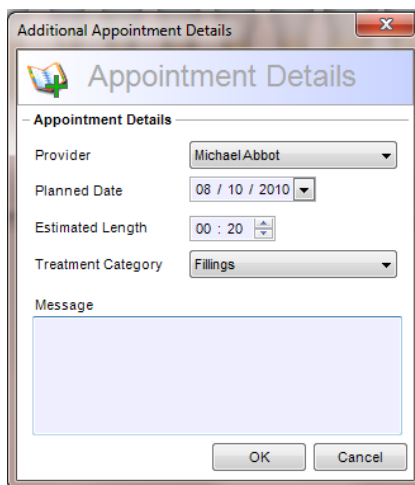
Adding Courses/Appointments

On the dental charting tab you will see a box on the left that looks like this...



Before you can begin charting treatments you must add a course and an appointment. The only exemption from this is when you are charting foundation treatments (see "**Charting Foundation Treatments**" for more information).

You can add additional appointment details by simply double-clicking the appointment in the list or selecting the "Set App" link when an appointment is highlighted. This will enable you to set the provider dealing with the appointment, the estimated planned date, the overall length of the appointment and the treatment category. These details will then be carried through so that reception can see how long the appointment needs to be and who with etc.

A screenshot of a dialog box titled 'Additional Appointment Details'. The dialog box has a close button (X) in the top right corner. Below the title bar, there is a header area with a small icon and the text 'Appointment Details'. The main content area is titled 'Appointment Details' and contains several fields: 'Provider' with a dropdown menu showing 'Michael Abbot', 'Planned Date' with a date picker showing '08 / 10 / 2010', 'Estimated Length' with a time picker showing '00 : 20', and 'Treatment Category' with a dropdown menu showing 'Fillings'. Below these fields is a 'Message' section with a large text area. At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

Please note that you don't have to enter these details. Comart Dental V5 will attempt to fill in this information based on what it currently knows from the treatments being entered.

Add Course	<p>Selecting the "Add Course" link will create a new course of treatment for this patient. Note that the course is allocated a unique number. This course number can be used as a reference to any treatments administered within it. Creating a course will automatically create one appointment.</p> <p>You can rename the course by selecting it and pressing the left hand mouse button on it a second time.</p>
Add Appt	<p>When a course is selected, you can add additional appointments by pressing the "Add Appt" link. Treatments cannot be applied directly to a course but only to an appointment.</p> <p>Appointments will be given an automated incremental number according to the number that exists within the course. e.g. Appointment 1, Appointment 2 etc.</p> <p>You can rename the appointment by selecting it and pressing the left hand mouse button on it a second time.</p>
Delete	<p>You can delete whole courses and appointments using the "Delete" link. The only time you may not delete a course or an appointment is if at least one treatment has been charged to the patient. Under these circumstances the treatment cannot be deleted, and neither can the course and appointment that house it.</p>

Next to each course and appointment is a check box. This represents their completed or non-completed status. It also gives you a quick way to complete all of the treatments within a given appointment or course. Ticking an appointment for example will set all of the treatments within that appointment to "Done", and vice versa. Likewise, ticking a course will complete every treatment in the whole course.

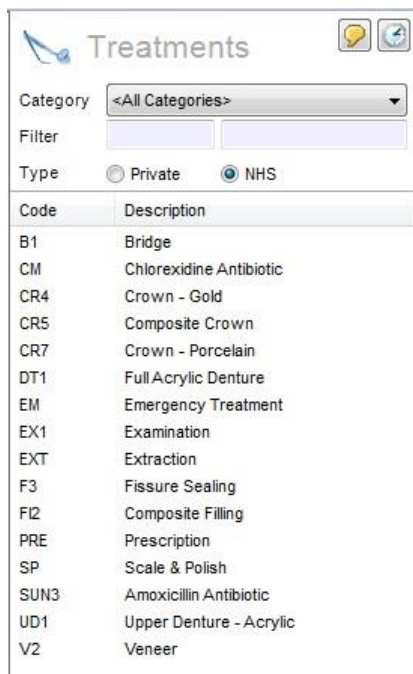
If the NHS extension has been activated then every course in the window that has a claim against it will be highlighted with a background colour. Otherwise no highlight will appear (unless the course is currently selected).



Tip: If you find that the treatment you have chosen refuses to be applied to the dental chart, make sure that you have an appointment created and selected. A treatment must be added to an appointment.

Available Treatments

On opening this tab you will notice that the standard "Patient Details" panel on the right side of the screen disappears and a list of available treatments replaces it:



Code	Description
B1	Bridge
CM	Chlorexidine Antibiotic
CR4	Crown - Gold
CR5	Composite Crown
CR7	Crown - Porcelain
DT1	Full Acrylic Denture
EM	Emergency Treatment
EX1	Examination
EXT	Extraction
F3	Fissure Sealing
FI2	Composite Filling
PRE	Prescription
SP	Scale & Polish
SUN3	Amoxicillin Antibiotic
UD1	Upper Denture - Acrylic
V2	Veneer

This list of treatments is taken from the treatments database (see **"The Treatment Editor"** for more information).

When you create a treatment, you assign it to a "Treatment Category" (see **"Working with Categories"** for more information). The list of available treatments will default to displaying every treatment that your practice offers, however you can quickly narrow down this list by changing the Treatment Category drop down. Doing this will show you only those treatments that fall within that category.

You can also filter the treatments by typing into the code, or description area of the filter.



Tip: If the NHS extension has been activated you will also see two option boxes saying "Private" and "NHS". This can be used to further filter your treatments, as only treatments that have been marked as available under the NHS will appear when the NHS option box is selected

Adding a Treatment to the Dental Chart

There are several ways of adding a treatment to the dental chart. The method also differs between treatments types, of which there are seven altogether. (For a full description of what each treatment type represents see "**Treatment Types**" in the "**Treatment Editor**" section).

We will now go through how to apply each of the different types of treatments to a patient.

Adding Treatments - General

A general treatment can be added simply by double-clicking it in the list of available treatments, or it can be added by selecting it and then left-clicking anywhere on the dental chart.

Because a general treatment is not applied to a specific tooth but relates to the whole patient e.g. check-up or X-Ray, it does not appear on the dental chart.

Adding Treatments – Tooth Surface

A tooth surface treatment can be added in two ways. You can select it from the list of available treatments, and then left-click on the surfaces of any tooth you want to apply the treatment to, or you can double-click the treatment from the list and have a tooth surface selector appear. Below is a screenshot of this dialogue...



Either type or select the tooth to which you want to apply this treatment and then tick the surfaces that you want the treatment to apply to. Note that the available surfaces will change according to the type of tooth chosen.

When applied, this treatment will cause the selected surfaces of the appropriate tooth to be highlighted in the chosen treatment colour.



Adding Treatments – Whole Tooth

A whole tooth treatment can only be applied in one way. Simply select it from the list of available treatments, and then left-click on whatever teeth you want to apply the treatment to.

This treatment will cause the entire tooth to be highlighted in the chosen treatment colour.



Adding Treatments – Tooth Root

Very similar to the whole tooth treatment, a tooth root treatment can only be applied in one way. Simply select it from the list of available treatments, and then left-click on whatever teeth you want to apply the treatment to.

This treatment will outline the selected tooth with the chosen treatment colour representing a root treatment. Because only an outline is used on the tooth, other treatments such as a crown or filling can also be seen on the tooth at the same time.



Adding Treatments – Implant

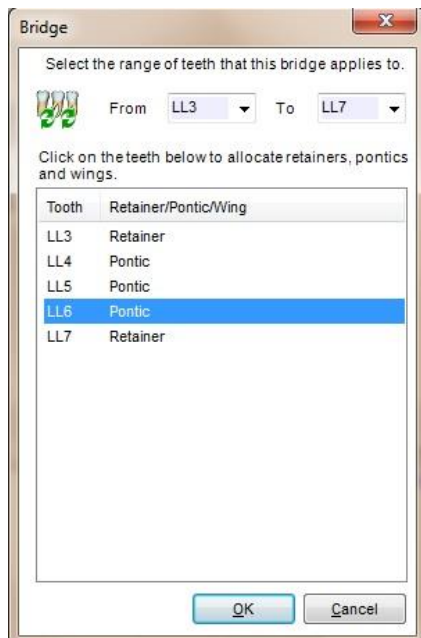
An implant treatment can only be applied to the whole tooth. Simply select it from the list of available treatments, and then left-click on whatever teeth you want to apply the treatment to.

This treatment will create a circular graphic that represents an implant. Please note that implants should only be applied to teeth that have been extracted. When this is done and the implant is completed, the implant graphic will also appear on the perio chart, making it easy to see which teeth in the perio chart are real and which are not.



Adding Treatments – Bridge

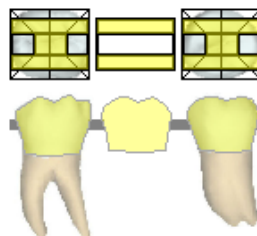
A bridge treatment can be added in two ways. The first method is simply to double-click the treatment in the available list. This will show the following dialogue...



From here you can choose the range of teeth that this bridge applies to. Once an appropriate range is selected you can assign whether each tooth is a retainer, a pontic or a wing. By default all the teeth are marked as retainers but you can make a tooth a pontic or a wing by left-clicking it.

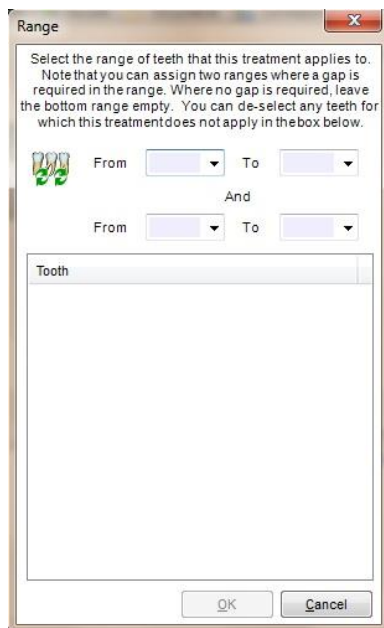
The second way of adding a bridge treatment is to select it from the list of available treatments and then to choose a tooth on the chart. This will display the bridge dialogue as just described, however the tooth you selected will become the starting tooth of the bridge.

A bridge treatment spans a range of teeth and uses a slightly different graphic for both retainers and pontics, as can be seen here; The outer teeth are retainers and inner one is a pontic.



Adding Treatments – Range

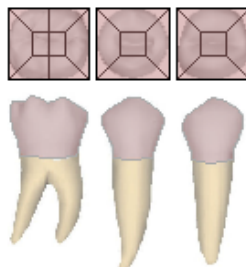
A range treatment is very similar to a bridge in the way it is applied. It can be added in two ways. The first method is simply to double-click the treatment in the available list. This will show the following dialogue...



This will enable you to select the range of teeth that this treatment applies to. Note that you can assign two ranges in this way, allowing for a gap in the middle, or specifying upper and lower teeth. This is useful for occasions when you are creating both upper and lower dentures for a patient.

The second way of adding a range treatment is to select it from the list of available treatments and then select a tooth on the chart. This will display the range dialogue as before, but the tooth selected will become the starting tooth of the range.

A range treatment spans a range of teeth and colours the entire teeth affected with the allocated colour.



Adding Treatments – Tooth Extracted

A tooth extracted treatment can only be applied in one way. Simply select it from the list of available treatments, and then left-click on whatever teeth you want to apply the treatment to.

A planned extracted tooth treatment will shade the tooth white with a diagonal line through the middle of it. Once completed, the tooth will be completely removed from the dental chart.



Adding Treatments – Retained Root

A retained root graphic is very similar to the tooth extracted graphic and only becomes clearly evident once the treatment is completed. When applied, it will remove the crown of the tooth whilst leaving the root untouched.



Adding Treatments – User Defined

A user defined graphic allows you to choose either a circle a square or a triangle shape or some short text. You can size these shapes to however large you need them to represent different treatments or type in a maximum of 4 letters for the text treatment. These user defined graphics can be placed anywhere on the tooth, either on the crown or the root.



Adding Quantity Treatments

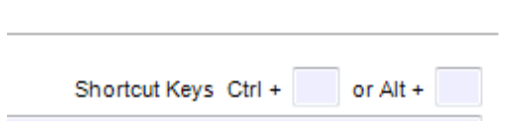
Some treatments are marked as quantity items. This means that you may want to specify the number of items being added in a single record e.g. 3 X-Rays. Rather than adding the X-Ray three times, when marked as a quantity item a dialogue will appear asking you to select the number of items to be added to the chart...



Adding quantity items can also affect stock quantities if the program is configured to manage the stock quantity of this item (see "The Treatment Editor" for more information).

Adding Treatments – Shortcut Keys

Patient Treatments can be quickly selected using a designated 'Shortcut Key'.



To set this up, you will need to go into the Treatment Database and open a commonly used Treatment. There you will find Shortcut Key Boxes where you can enter a letter 'command'. Once you have entered this, from your charting screen you can simply press either the CTRL + <key> or ALT + <key> to instantly select that treatment.

For example:

- You could assign CTRL + "A" for Amalgam fillings
- Or, ALT + "M" for Missing tooth

Using the Treatment Window

Below the dental chart graphic are three windows; Treatments, Clinical Notes and Watch. The treatment window lists all of the treatments that have been applied to the patient within a selected course or appointment and it appears as displayed below...

Treatments					
Clinical Notes		Watch			
Done	Date	Code	Description	Tooth	NHS Price
<input type="checkbox"/>	14/08/2012	XRay	X-Ray	General	<input type="checkbox"/> £0.00
<input type="checkbox"/> Override All Pricing Settings Edit Item Delete Item					

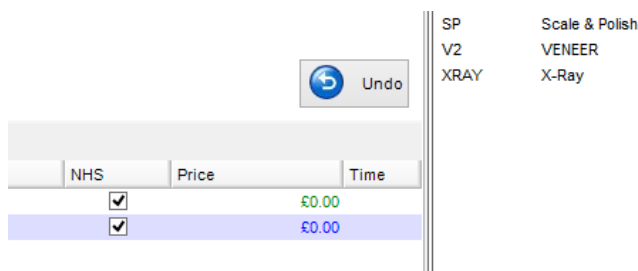
Whenever you add a treatment an appointment, you will see it appear in this window. Below is a list of what each column in the treatment window represents...

Done	This check box represents whether the treatment is either planned or completed. When a treatment is first added, this box will be unticked meaning that it is merely a planned treatment. Ticking the box will complete the treatment.
Date	When the "Done" box is unticked, this will display the planned treatment date. Once the treatment is completed it will change to the date when the treatment was done.
Code	This is the unique code assigned in the treatments database.
Description	This is a description of the treatment assigned in the treatments database.
Tooth	The teeth affected will appear in this column. Where no tooth is selected, the word "General" will appear.
NHS	If the NHS extension is activated you will see an NHS tick box column that displays whether the treatment is being administered under the NHS or is private.
Price	The calculated price of this treatment will appear in this column. The price is based upon the price schedule and price level for this patient and upon the prices set-up in the treatments database.

Treatments can appear in three different in the treatment window. These are...

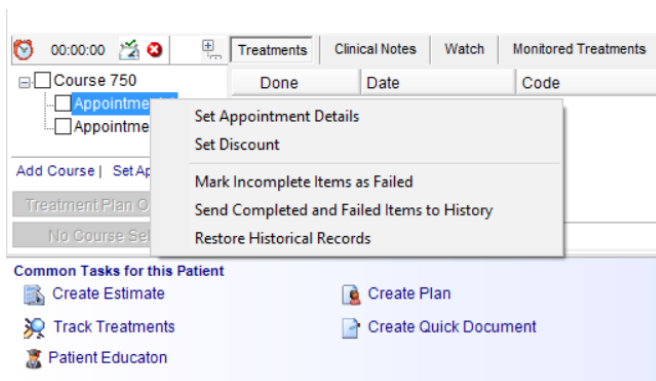
Blue	For planned treatments.
Green	For completed treatments that have not yet been invoiced.
Black	For completed treatments that have been invoiced to the client.

Note: At any point in the Charting process, you can select the 'Undo' button to delete the previous action you took in the charting grid. This is particularly useful when completing the Base Charting. If you make a mistake in inputting historic treatments on the base chart, you can instantly 'Undo' the last action.



Edit Appointment details in Charting

The following options are available when you right-click on the 'Appointment' in the charting grid...

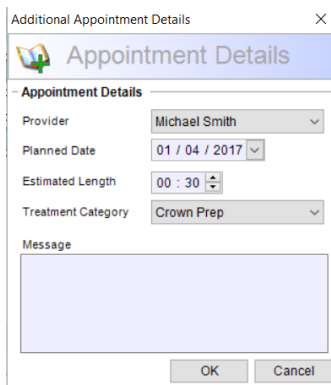


Set Appointment Details

This enables you to manually edit the planned date of the appointment, as well as the length of time required for it. This is especially useful when there will be multiple appointments in a course.

If the details are set correctly for each appointment, the communication between the surgery and the reception desk will be accurate and therefore more efficient.

An additional note/ message can also be added to the appointment



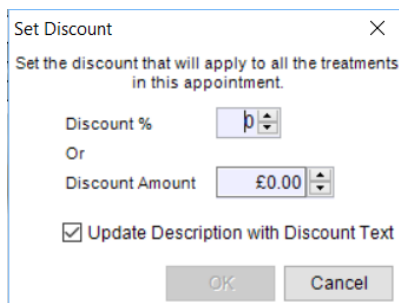
The 'Appointment Details' dialog box is titled 'Additional Appointment Details' with a close button (X) in the top right corner. It features a header with a green icon and the title 'Appointment Details'. Below this, the 'Appointment Details' section contains several fields: 'Provider' (Michael Smith), 'Planned Date' (01 / 04 / 2017), 'Estimated Length' (00 : 30), and 'Treatment Category' (Crown Prep). At the bottom, there is a 'Message' text area and two buttons: 'OK' and 'Cancel'.

Set Discount

This enables you to set a discount for the entire appointment, rather than individually discounting all the treatments manually.

You can choose to set a discount percentage or a numerical amount.

If you tick the tick the box at the bottom, it will automatically update the treatment course with the Discount Text (stating the amount discounted for the patient)



The 'Set Discount' dialog box has a title bar with a close button (X). The main text reads: 'Set the discount that will apply to all the treatments in this appointment.' Below this, there are two options: 'Discount %' (set to 10) and 'Discount Amount' (set to £0.00). A checkbox labeled 'Update Description with Discount Text' is checked. At the bottom, there are 'OK' and 'Cancel' buttons.

Mark Incomplete Items as Failed

You would use this function when there has been planned treatment, the patient has not completed it, and enough time has passed that you decide to 'fail' the treatment. This will enable customers to keep a record of planned treatment items in their relevant courses, but they will be ignored by the software because of them being listed as failed. Failed items in the treatment course are marked in red to make them stand out.

Send Completed and Failed Items to History & Restore Historical Records

If you would like to remove any Failed items from the charting page, you can do so using this function. There is also a function so that you can restore any records that you have removed.

Editing Patient Treatments

You can edit the treatment details once it has been added to the patient chart by double-clicking on it in the treatment window, or by selecting it and pressing the "Edit Item" link below the window. The "Patient Treatment Editor" will be displayed:

Patient Treatments Editor - [CR4]

Treatment - CR4

Save & Close Abandon Save

Treatment Custom Notes

Treatment Details

Code: CR4

Description: CROWN GOLD - Prep

☐ Update Description

Quantity: 1

Applies To: LR7

Additional Info:

Stage: Adjustment

Provider: Dr Michael Smith

Planned Date: 01 / 06 / 2017

Completed Date: / /

☐ Completed ☐ NHS Treatment ☐ Failed

Pricing Details

Price Schedule: Default

Price Level: Price 1

Discount %: 0

Or Discount Amount: £0.00

Net Price: £231.00

VAT: £0.00

Total Price: £231.00

☒ Override Price

☒ Apply VAT

Last Updated by Dr Michael Smith on 31/03/2017 16:13:54 - Assistant: Miss Gemma Greaves

The following table explains what each field in this editor does...

Code	The treatment code. This cannot be altered.
Description	This will default to the description typed into the treatments database, however you can overwrite it here.
Quantity	Most of the time this will be "1", however treatments that are marked as quantity items can have more than one item per record.
Applies To	The teeth that this treatment applies to. This will be displayed in either standard or FDI format.
Additional Info	Any additional reference that you may wish to add to the treatment. For example it can be used to record serial numbers of bridges.
Stage	If the treatment has been set up with various stages, you can select the current stage from this drop down.
Provider	The staff member allocated to perform the treatment. This will default to the person currently logged on to the system.

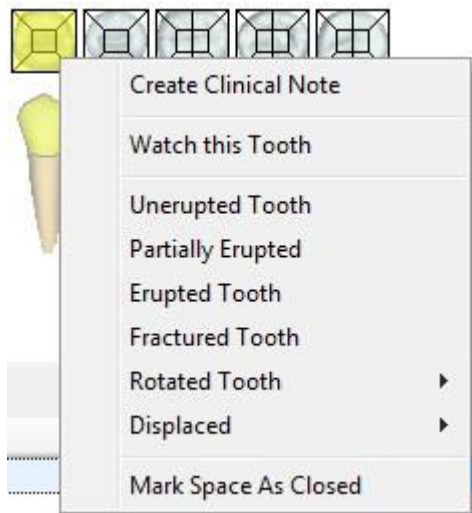
Planned Date	This is the date that the treatment was planned. It will default to today's date but can be overridden.
Completed Date	This is the date that the treatment was completed. It only becomes active when the "Completed" check box has been ticked.
Estimated Dentist/Hygienist Time	This is the estimated length of time that the provider believes the treatment will take to administer. It will default to whatever is set-up in the treatments database.
Actual Time	This is the actual length of time that the procedure took. Although it is not essential to fill in this field, it can be useful for reporting purposes.
Price Schedule	The price schedule that is being used to calculate the price of the treatment. It will default to whatever is set in the patient record.
Price Level	The price level that is being used to calculate the price of the treatment. It will default to whatever is set in the patient record.
Price	The calculated price of the treatment based on whatever is set in the treatments database. This can be overridden if you wish.
Override Pricing	This check box becomes ticked whenever the price has been overridden. It ensures that any further price calculations will not be applied to this treatment.



Tip: Once a treatment has been charged to the patient the fields become non-editable. Make sure that prices etc. are valid before charging the patient.

Creating Clinical Notes

Often it is necessary to make clinical notes about a patient's dental condition or about a specific treatment. To add a note about a specific tooth, simply right-click on the on the tooth in the dental chart you want to make a note on and select **"Create Clinical Note"** from the popup menu, or choose "Add Note" from the clinical notes window for a more general note.



This will display the "Clinical Note" dialogue that will allow you to type some comprehensive details regarding the patient.

To set up commonly used clinical notes, you can select **"Manage Templates"**. This will allow you to create clinical notes that you want to use very often and give them a code. When you create a clinical note you can then either select the template from the "Template" drop down list or choose **"Select Multiple"** which will add any number of templates to the clinical note box displayed below. You can then make any last minute modifications to the note before saving it to the database.

The clinical note dialogue...

Once the note has been made and you have selected OK, you will see the note appear in the "Clinical Notes" window of the Patient Editor. Notes that have only just been created today may be edited or deleted and will appear in the unlocked colour (blue by default), however once the current day ends, these notes become indelible and cannot be changed or deleted, in which case their colour changes to the locked colour (black by default)..

Please note that there is an additional way of viewing the notes in Comart Dental V5. Normally all notes are viewed under the "Clinical Notes" tab, however you can choose to make and view treatment specific notes in the same grid as the treatments themselves. If you wish to activate treatment specific notes, select the "Settings" link at the bottom of the treatments grid and tick the box "View Treatment Specific Notes in the Charting Grid". Note you can also choose the colour of both locked and unlocked notes in this area. It is best to choose a colour other than black for the locked notes as these will be viewed in the same grid as your treatments and it is easier to differentiate between treatments and notes if they are different colours (see below).

Treatments Clinical Notes Watch						
Done	Date	Code	Description	Tooth	NHS	Price
<input checked="" type="checkbox"/>	21/10/2009	1007	Scale and Polish	General	<input type="checkbox"/>	£41.00
<input checked="" type="checkbox"/>	21/10/2009	1235	Amalgam Filling	UL1 - MID	<input type="checkbox"/>	£16.00
M.A	26/10/2009	This is a clinical note made about the amalgam filling listed above. You can make as many of these notes as you wish about the treatment and they will be listed just below the treatment itself.				
<input checked="" type="checkbox"/>	21/10/2009	4000	Bonded Crown - Prep	LR3	<input type="checkbox"/>	£50.00

All clinical notes are always viewable under the “Clinical Notes” area of the charting tab whether they are general notes or treatment or tooth specific.

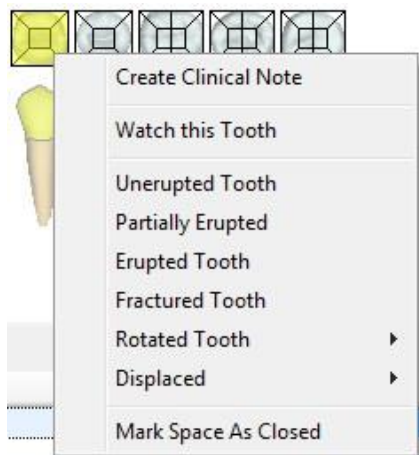
You can instantly refine your clinical notes by performing a search on keywords. You will find the search box above the notes, under the “Clinical Notes” tab in Charting. Please see below...

Treatments Clinical Notes Watch Monitored Treatments					
<input type="text" value="grade II"/>					
Alert	Applies	Provider	Assistant	Date	Note
	General	r.r		25/11/2009	No blood clots No soft tissue wound present No reaction to pressure is indicative of teeth Tooth Mobility is not present Upper Lip lacerated Need RCT Apical radiolucency Upper Right central is grade II/mobility Amalgam need replacement Caries hidden under crowns Tipped History of pain /discomfort/sensitivity Caries lesion buccal/ symptoms Vitality Test taken/ Negative response We will monitor his teeth every months Impacted/retained root...

Putting a Watch on a Tooth

At times you may want to quickly add a watch on particular tooth to serve as a reminder for things to check in the future. You can accomplish this in the "Watch" window.

To add a watch on a specific tooth, simply right-click on the on the tooth in the dental chart you want to make a note on and select **"Watch this Tooth"** from the popup menu.



This will display the "Watch" dialogue enabling you to type a brief note about the tooth...

Watch Tooth - LR4

Note Excessive bleeding around the gum line

You began watching this tooth 27 / 07 / 2015

☐ Do NOT create a clinical note for this watch

OK Cancel

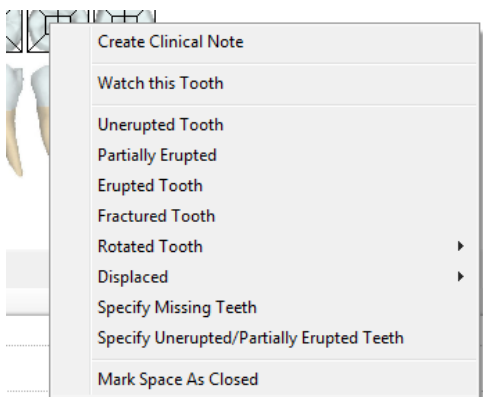
Once a watch has been created, it will show in the "Watch" window in the Patient Editor. It will also automatically create an entry as a 'clinical note', unless you tick the box to NOT create a note. Also, a watched tooth will have a small flashing eye graphic next to it. This gives a clear visual indication of which teeth you need to keep an eye on. Watches can be deleted individually or completely cleared using the links at the bottom of the window.

Selecting Unerupted or Erupted Teeth

To show that a tooth has not yet erupted, simply right-click on the on the tooth in the dental chart and select "**Unerupted Tooth**" from the popup menu. The tooth will then disappear from the chart and display a UE symbol. Likewise if the tooth is partially erupted, selecting this from the menu will result in the tooth being lightly shown with a PE symbol.

Once the tooth has erupted, right click again on the empty space and select "**Erupted Tooth**". The tooth will then reappear in the chart.

When processing a base chart for a child, you can instantly specify which teeth are 'erupted' or 'unerupted'. This makes it quicker to show all permanent teeth as unerupted. You can see the options below...



Recording Missing Teeth on Base Charting

Often when charting a patient for the first time, the patient will have large numbers of teeth missing. You can quickly chart which ones are missing by setting the view option to "Foundation", right clicking anywhere on the chart and then selecting "Specify Missing Teeth". This will bring up a dialogue which by default will include all the permanent teeth in the mouth. You can set this range to whatever you want by selecting the appropriate teeth in the range. You can also untick the teeth that are still present. All the teeth that are left ticked will automatically be removed.

Selecting a Fracture on a Tooth

To show that a tooth has a fracture on it, bring up the context sensitive menu and select "Fractured Tooth". You will then see a zigzag line appear down the middle of the tooth.

Marking a Gap as Closed

To mark a gap as closed, do exactly the same as before to bring up the context sensitive menu (i.e. right click on the relevant space in the chart) and then select “Mark Space As Closed”. A two arrow graphic will appear showing the gap has closed.

Specifying Missing Teeth

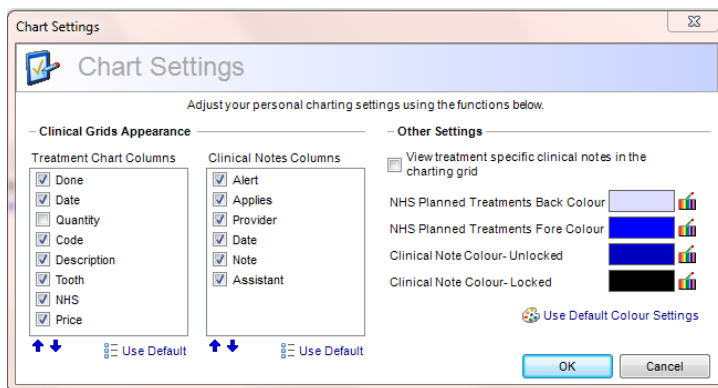
Sometimes a patient may have a large number of missing teeth. Rather than selecting a missing tooth graphic from the treatments and then choosing each tooth individually, this function will mark all teeth as missing as missing but will allow you to untick the teeth that are still present.

Changing the Chart Settings

If you want to modify any of the following you can select “Settings” at the bottom of the charted items grid:

- The columns viewed in the treatments grid
- The columns viewed in the clinical notes grid
- The colours used in the grids
- The way clinical notes are viewed

Choosing the “Settings” link will display the following screen...

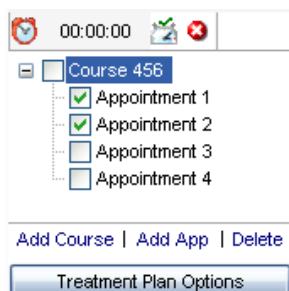


Treatment Chart Columns	Allows you to choose which columns are shown in the treatments grid.
Clinical Notes Columns	As above but you can select which columns are shown in the clinical notes grid.
View Treatment Specific Clinical Notes in the Charting Grid	You can view treatment specific notes in the same chart as the treatments if you wish. To do this, turn on this feature. Select a treatment under the “Treatments” tab in the grid and then select “Add Note”. This will add

	a note directly to that treatment and it will appear directly underneath the treatment you have made the note about. Of course the clinical note will also still be visible under the clinical notes tab as well.
NHS Planned Treatments Forecolour and Backcolour	To differentiate more easily between NHS and private treatments in the treatments grid you can change the back and fore colours of NHS items.
Clinical Notes Colour	Again you can change the colours of your clinical notes when they are unlocked and when they are locked to the colour of your choice.

Creating Treatment Plan Options

A very important feature within Comart Dental V5 is the ability to create treatment plan options. At the bottom of the courses/appointment control you will see the **“Treatment Plan options”** button.



This button only becomes highlighted when you click on a Course, as the treatment options are related to the course of treatment, not a specific appointment. Pressing this button will display a charting area almost identical to the standard charting area, with one or two differences. Instead of adding courses on the bottom right, you can now add as many options as you like, and also add as many appointments to those options as are required.

Optional Plans

Option 1

Appointment 1

Appointment 2

Option 2

Appointment 1

Option 3

Appointment 1

Appointment 2

Appointment 3

Add Option | Add Appt | Delete

Convert Option to Plan

Create each option in exactly the same way as you would perform normal dental charting. The chart will be reset for each option so the patient will be able to clearly see what each course of treatment involves. Once you have prepared the various options you can create an optional plan by selecting **“Print Treatment Options”** in the **“Common Tasks”** area at the bottom. The printable form will show up to 6 treatment graphics (images) on the page. This can then be given to the patient to take away and think about.

When the patient decides which option they wish to go for, you can instantly convert that option into an actual treatment plan. To do this select the course and go into the treatment options area. Click on the option chosen by the patient and then select the **“Convert Option to Plan”** button which becomes highlighted when an option is chosen. This will take you back to the standard patient charting screen and will create the relevant appointments and treatments in the course for you.

Administering an NHS Treatment

If the NHS module has been activated you will see three additional things on the patient charting screen:

Private/NHS option Boxes in the Available Treatments window.	Selecting one of these options will display the appropriate treatments. Also any treatment administered to a patient will be done under the selected option.
NHS Column in the Treatments grid	Just below the graphical dental chart the treatment grid will display an additional column called "NHS". Treatments performed under the NHS will be ticked.
Create FP17 Button	A button will appear just below the courses/appointments window. When a course is selected, the "Create FP17" button will become enabled and the user will be able to create a claim against that course.

To administer an NHS treatment, ensure that the NHS option is selected under "Available Treatments". You should then see only treatments available under the NHS appearing the list. To make a treatment NHS compatible you must ensure that is set up correctly in the treatments database letters (see "The Treatment Editor " for more information). Apply the treatment in the same way as usual and you will see the treatment appear in the grid with the NHS box ticked. The treatment will also be entered with a zero value (the actual cost of the course of treatments is charged when a claim is created). If you have entered an item in error, i.e. it has been entered as an NHS item when it should have been private or vice versa, then simply edit the item by double clicking it in the grid and tick or untick the "NHS Treatment" box.

Creating an NHS Claim

To create a claim for a course of treatment, simply select the appropriate course in the Courses/Appointments window and the “Create FP17” button will become enabled.

Pressing this button will display the following window...

This form allows you to enter the standard fields that you would find on a FP17 form. The performer number is taken from the person who administered the treatments, and the completed date will only be filled if the course is marked as being completed.

The program will examine the various treatments used in the course and select the highest band from them. If you have entered which clinical dataset each treatment belongs to (see “Treatment Editor – Treatments” for further details) then the program will also calculate the number items for each dataset as well, meaning that most claims can be as simple as opening the claim and then saving and closing the form. The claim will be analysed when the user tries to save it, and if there are any known errors they will be reported to the user for correction before the claim will be permitted to be saved.

The program will also record the (D)ecayed, (M)issing, and (F)illed status of the patient’s current dental condition. Comart Dental V5 will automatically calculate this for you, however, you will need to ensure that your treatments are correctly set up in your treatments database, so that accurate calculations can be made.

You will need to fill in the relevant information for each of your treatments in the database. To do this, open the treatment editor and fill in the 'Clinical Data Set' box found towards the bottom. You can see this below...

NHS Details

☒ This treatment can be administered under the NHS

Charge Band **2** Clinical Data Set (FP17) **Permanent Fillings**

The FP17 form can be output to pre-printed stationery by simply pressing the print button.

To send your claims over the internet to the DPB see the section "Sending Claims to the DPB Over the Internet".

Creating an Orthodontic Claim

Creating an orthodontic claim is almost identical to creating a standard FP17 claim. To use it, you must first tell the program you wish to administer orthodontic treatments in the "Practice Setup" area of the program. Once that is activated, whenever you press the "Create FP17" to create a claim, the program will ask if you want to fill in a standard FP17 or an orthodontic FP17O. Selecting FP17O will display the following claim dialogue...

Orthodontic NHS Claims Form 1

NHS NHS Claims Form - Course 3

Settings

Save & Close Abandon Print Save Delete Claim

☒ Send Claim in Next Transmission

Claim Details Exemptions & Declarations Ethnic Group

Part 1 Provider Details

Performer Number Contract Number 0

Part 4 Orthodontic Data Set

Radiographs 0

☐ Removable Upper Appliance ☐ Removable Lower Appliance ☐ Fixed Upper Appliance ☐ Fixed Lower Appliance

☐ Functional Appliance ☐ Retainer Upper ☐ Retainer Lower

Extractions Upper Right Upper Left Lower Right Lower Left

Part 5 Orthodontic Assessment & Treatment Start

☐ Assessment & Review ☐ Assess & Refuse Treatment ☐ Assess & Appliance Fitted

IOTN Aesthetic Component

☐ IOTN Not Applicable

Referral Date Assessment Date 14 / 08 / 2012 Date Appliance Fitted

Part 6 Orthodontic Completion

☐ Treatment Abandoned Patient Failed to Return ☐ Treatment Abandoned Patient Requested ☐ Treatment Discontinued ☐ Treatment Completed ☐ PAR Scores Calculated

IOTN Aesthetic Component

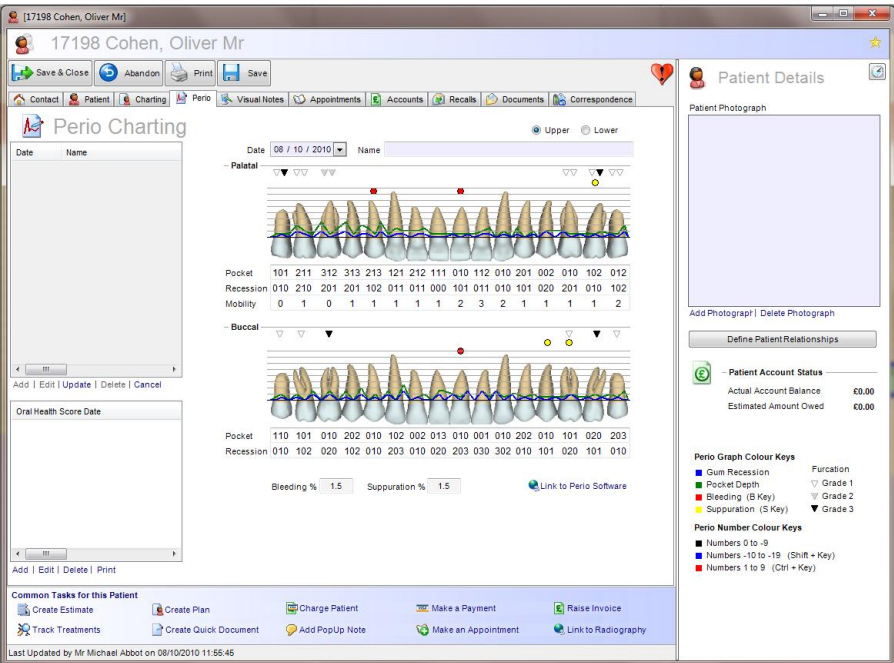
☐ IOTN Not Applicable

Completed or Last Visited Date

Repair to Appliance fitted by Another Dentist ☐ Regulation 11 Replacement Appliance

Patient Editor – Perio Charting

This page allows you to perform periodontal charting on the patient.



The perio chart enables you to record three separate pieces of information; the gum recession, the pocket depth and the mobility.

On the left of the chart are two perio lists. The top one is for recording full charts which are displayed in full colour on this page, and the bottom one is to record a basic perio exam (BPE).

Adding a Full Perio Chart

To add a full perio chart, select "Add" from the top perio list. The charting date will be automatically filled with today's date however this can be overwritten.

You can also key in a chart "Name". This field is optional, however you may find it helpful in identifying the chart at a later time.

Date	Name
08/12/2004	Initial Perio Chart

Add | Edit | Update | Delete | Cancel

BPE Chart Date
08/12/2004

Add | Edit | Delete

To chart the perio information for the upper palatal and lingual teeth simply key the relevant numbers into the recession, pocket and mobility areas. Note that as you

type the appropriate numbers into these fields, the cursor will automatically move on to the next field enabling you to create the chart as quickly as possible.

Numbers ranging from –19 to 9 can be keyed into these fields. This is achieved in the following ways...

Numbers 0 to –9	These are entered by simply using the numeric keys on your keyboard. These values appear in black.
Numbers –10 to –19	These can be recorded by holding down the SHIFT key on the keyboard, and then pressing the relevant number on your keyboard. For example holding down SHIFT and then pressing 3 will create a value of –13. These values appear in blue.
Numbers 1 to 9	Can be recorded by holding down the CTRL key on your keyboard and pressing the relevant number. These values appear in red.

As you type values into the perio chart fields you will see the numbers being visually recorded on the chart. The gum recession appears as a blue line, the pocket depth is displayed as a red line and mobility is not graphically displayed.

Note that on the upper teeth you are able to record data for both the palatal and buccal sides of the teeth, however mobility applies to the whole tooth and therefore is only recorded once in the palatal area.

You can also record the level of bleeding and suppuration for each tooth by pressing the 'B' key for bleeding, and 'S' for suppuration. There are three levels for each of these represented by a small, medium and large circle above the tooth. You can change the level by pressing either the 'B' or the 'S' multiple times. i.e. 1 tap = level 1, 2 taps = level 2 etc.

In the top right of the perio charting page you can change the view to see the lower teeth. You chart these in exactly the same way as the upper.

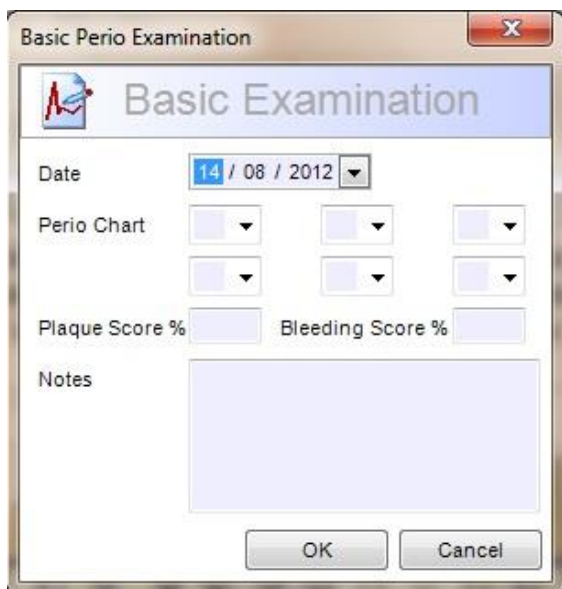
Once you have completed the chart, press the "Update" button just below the upper perio list box. It will then be recorded against this patient ready for viewing/editing at a later stage.

Pressing the "Print" button when this page is open will create a full colour single page with the patient's perio chart on it. This can be printed and given to the patient to take home.

Adding a Basic Perio Exam (BPE)

Rather than creating a full perio chart, you can create a BPE instead. This is much quicker to produce than a full perio exam but holds much less detail. You can add a new BPE by selecting "Add" from the bottom of the lower perio list.

This will display the BPE dialogue allowing you to enter six values in six different drop down fields. Each of these fields represents one group of teeth, or "Sextants".



The dialog box is titled "Basic Perio Examination" and features a "Basic Examination" header with a red 'A' icon. It contains the following fields:

- Date:** A date picker showing "14 / 08 / 2012".
- Perio Chart:** Six drop-down menus arranged in two rows of three.
- Plaque Score %:** A text input field.
- Bleeding Score %:** A text input field.
- Notes:** A large text area for additional information.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

Date	Name
08/12/2004	Initial Perio Chart

[Add](#) | [Edit](#) | [Update](#) | [Delete](#) | [Cancel](#)

BPE Chart Date
08/12/2004

[Add](#) | [Edit](#) | [Delete](#)

The following codes are relevant to a basic perio exam: 0, 1, 2, 3, 4 and 1*, 2*, 3*, 4*.. These values can either be selected from a drop down list or typed manually into each field.

You can also make notes about the exam in order to record any other important details.

Recording Denplan Oral Health Scores

You can link the BPE chart to record the patients OHS if you wish. To do this you must activate the Oral Health Score module area in the Practice Setup (see "Managing Your Practice Setup" for more information).

When activated, instead of seeing the BPE dialogue you will see the following...

Oral Health Score

Exam Date: 26 / 10 / 2009

Is the patient experiencing any pain or discomfort from their teeth? [dropdown]

Is the patient able to eat an unrestricted diet? [dropdown]

Is the patient satisfied with the appearance of their teeth? [dropdown]

Mucosal State - Does the patient have any mucosal lesions? [dropdown]

Occlusal State - Does the patient have at least 10 opposing teeth? [dropdown]

Caries: [2x4 grid of dropdowns] Caries Score: [dropdown]

Wear and Tear: [2x4 grid of dropdowns] Wear and Tear Score: [dropdown]

Periodontal: [2x4 grid of dropdowns] Periodontal Score: [dropdown]

Overall Score: [text box]

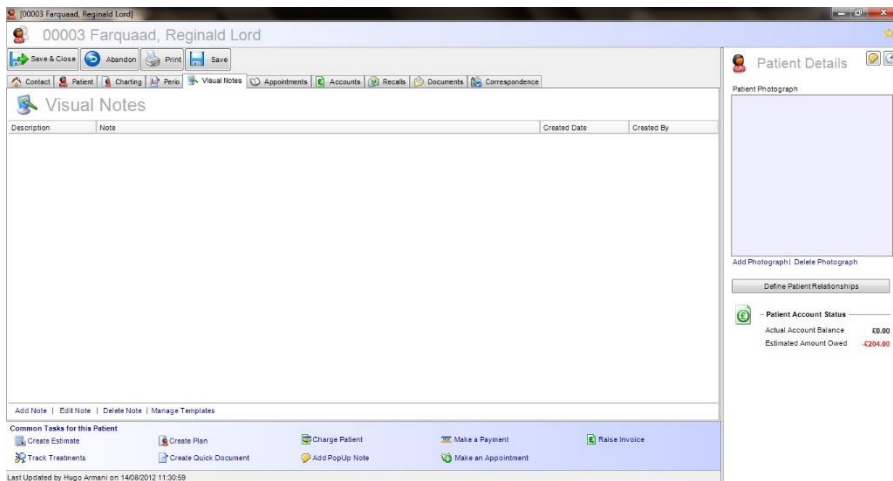
Notes: [text area]

OK Cancel

This dialogue follows the standard pattern of filling in an Oral Health Score. The appropriate values for each question are listed in each drop down box. Once you have entered all the values you will be left with an overall score.

Patient Editor – Visual Notes

A powerful feature within Comart Dental V5 is the ability to create visual notes. These combine written notes with diagrams of a patient's teeth that can be drawn on in various colours...

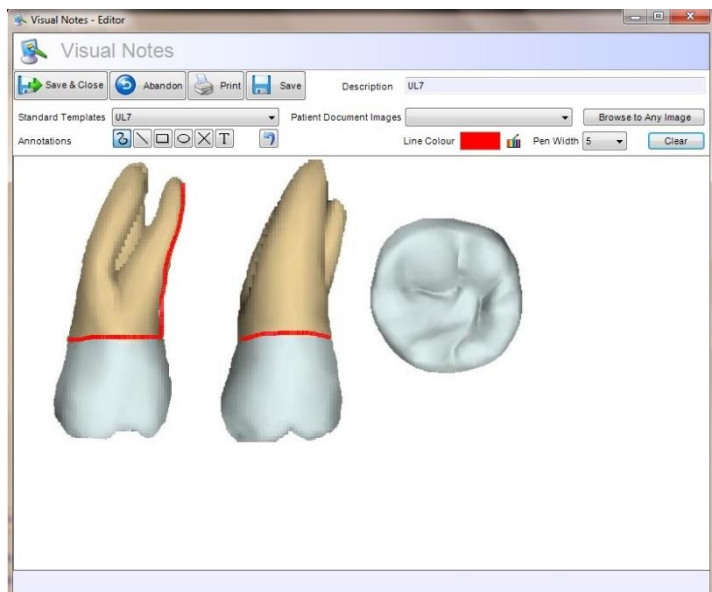


Visual Notes appear as a list in a grid which shows the tooth affected, the actual note text, the name of the staff member who made the note, and the date the note was created.

Notes can be added, edited or deleted using the links just below the Visual Note window, or you can edit a note simply by double-clicking it in the grid.

The Visual Note Editor

The Visual Note Editor looks like this...

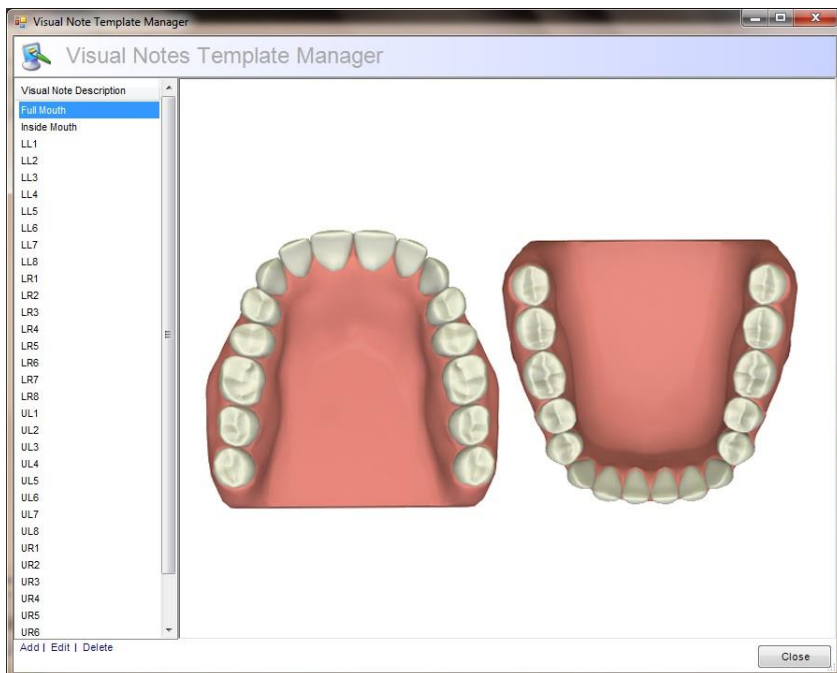


The various fields on this form perform the following functions...

Visual Notes Selection	This allows you to select the picture that you want to draw onto. Every tooth has been provided and is viewed from three different angles; palatal, buccal and top.
Line Colour	Selects the colour that will be used to draw onto the diagram. Simply press the colour button and a colour dialogue will appear allowing you to choose from a whole range of colours.
Pen Width	This is the thickness of the pen that will be used to draw onto the picture. In this way you can draw a think line (1) through to a very thick line (20).
Clear	If the lines you have drawn on a diagram are incorrect and need to be cleared, you can easily do so by pressing this button.
Notes	This is where you can type actual text to make a note about the drawing if necessary. Leaving this field blank will automatically create a blank note with basic details.

When you "Save" the Visual Note, it will be stored and displayed in the Visual Note tab in the patient record.

Please note, you can also add your own visual note templates to the program very easily. If you have a picture you would like to use as a visual note simply click on "Manage Templates" at the bottom of the Visual Notes grid. This will display the following screen...



Select "Add" at the bottom of the list on the left and select the picture that would like to add to your template selection. Enter the name of the picture in the Image Name box and then browse to that image using the magnifying glass. Once you have done this and saved the entry you will see it appear as an option in your list of visual notes that you can now annotate.

Patient Editor – Accounts

The accounts screen shows you a list of all of the invoices, payments, credits and refunds which have been made for this patient.

Patient Editor - [Braithwaite, David Mr]

Braithwaite, David Mr

Save & Close | Abandon | Print | Save

Contact | Patient | Charting | Perio | Visual Notes | **Accounts** | Appointments | Recalls | Documents

Accounts

Date	Number	Course	Staff	Description	Debit	Credit
19/03/2005	70	0	Michael Abbot	Payment	£0.00	£350.00
11/02/2005	167	72	Michael Abbot	Invoice	£45.00	£0.00
06/02/2005	164	72	Michael Abbot	Invoice	£80.00	£0.00
06/02/2005	163	70	Michael Abbot	Invoice	£350.00	£0.00

Edit Item

Account Balance -£105.00

Common Tasks for this Patient

- Create Estimate
- Create Plan
- Charge Patient
- Make a Payment
- Raise Invoice
- Track Treatments
- Create Quick Document
- Add PopUp Note
- View Consultation Notes

Last Updated by Michael Abbot on 19/03/2005 14:39:59

Patient Details

General | Waiting Room

Patient Photograph


Add Photograph | Delete Photograph

Define Patient Relationships

It also tells you a summary of their account balance. If a patient queries how much money they owe you, then a quick look at this screen will tell you all you need to know. When a patient is in credit the account balance on this page will appear black, if they owe money it will appear red.

The patient's accounts are listed in date order, from the latest date through to the oldest, therefore the latest transactions will always appear at the top of the list.

You can also print a statement for this patient by select the "Print Statement" that appears at the bottom of this list.

 **Tip:** You can take a closer look at any financial transaction by double-clicking it, or by selecting it and then pressing the "Edit Item" link. Whatever type of transaction you select will show the appropriate window e.g. double-clicking an invoice will display the invoice screen, whereas a credit will show the payment screen. Note that these dialogues are read only and are used for reference only.

Patient Editor – Appointments

This page shows a list of this patient's appointment. It's useful to refer to this screen if a patient queries when their next appointment is.

The screenshot shows a software interface for patient appointments. The title bar indicates the patient is '00003 Farquaad, Reginald Lord'. The main window has a menu bar with options: Contact, Patient, Charting, Prescribe, Visual Notes, Appointments, Accounts, Referrals, Documents, and Correspondence. Below the menu is a toolbar with icons for Save & Close, Abandon, Print, and Save. The central area is titled 'Appointments' and contains a table with columns: Date, Start, Duration, Staff, Treatment Category, Location, Appointment Category, and Status. The table has one entry: 10/08/2012, 11:10 AM, 20, Annette Terry, with Status 'Pending'. To the right is a 'Patient Details' sidebar with a 'Patient Photograph' section (containing a placeholder box and buttons 'Add Photograph', 'Delete Photograph'), a 'Define Patient Relationships' button, and a 'Patient Account Status' section showing 'Actual Account Balance' as £0.00 and 'Estimated Amount Owed' as £204.80. At the bottom, there is a 'Common Tasks for this Patient' section with buttons: Create Estimate, Create Plan, Charge Patient, Make a Payment, Raise Invoice, Track Treatments, Create Quick Document, Add PopUp Note, and Make an Appointment. A footer note states 'Last Updated by Hugo Armani on 14/08/2012 11:30:59'.

Date	Start	Duration	Staff	Treatment Category	Location	Appointment Category	Status
10/08/2012	11:10 AM	20	Annette Terry				Pending

The list shows you various relevant details about the appointment such as what date it will be held, what time it will be done and who the patient will be seeing.

The appointment list is shown in date order with the latest appointment being shown at the top and the oldest appointment appearing at the bottom.

You can jump directly to any of the appointments listed by double-clicking the appointment in the list or by selecting **"Edit Item"** at the bottom of the list. This will minimize the patient record and open the appointment diary with the opened appointment selected.

Patient Editor – Recalls

This page displays the patient's recall history and the date of their next recall.

The screenshot shows the 'Recalls' tab in the Patient Editor for patient 00003 Farquaad, Reginald Lord. The interface is divided into several sections:

- Dentist Recalls:** Includes fields for Last Recall Date (10 / 08 / 2012), Next Recall Date (10 / 02 / 2013), Recall Every (6 Months), and Recall Reason (3 Months | 6 Months | Next Appointment). There is a checkbox for 'Do not recall this patient for dental procedures'.
- Hygienist Recalls:** Similar fields for Last Recall Date (10 / 08 / 2012), Next Recall Date (10 / 02 / 2013), Recall Every (6 Months), and Recall Reason (3 Months | 6 Months | Next Appointment). There is a checkbox for 'Do not recall this patient for hygiene procedures'.
- Recall Correspondence:** Includes a dropdown for Recall Category and a Recall Category field.
- Patient Details:** A sidebar on the right showing the patient's photograph, a 'Define Patient Relationships' button, and account status (Actual Account Balance: £0.00, Estimated Amount Owed: £204.80).
- Common Tasks for this Patient:** A bottom section with buttons for Create Estimate, Create Plan, Charge Patient, Make a Payment, Raise Invoice, Track Treatments, Create Quick Document, Add PopUp Note, and Make an Appointment.

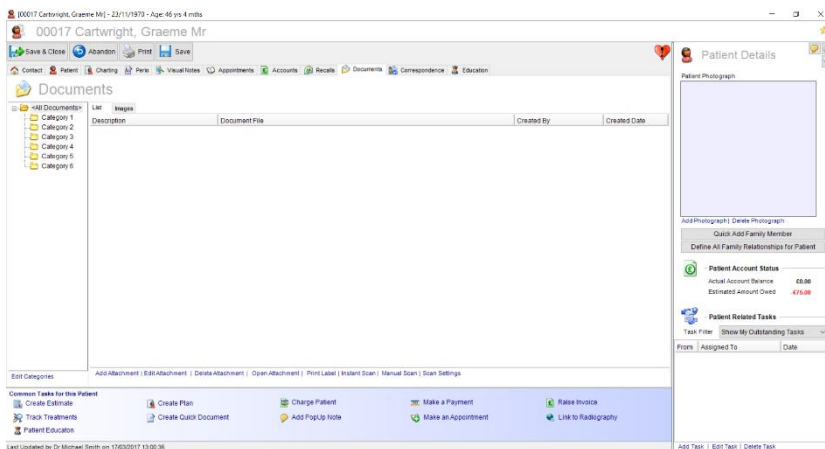
Patients can be recalled to see the dentist and the hygienist on separate dates and for different reasons. The following table explains what each field is for...

Last Recall Date	The date that the patient last visited the practice.
Next Recall Date	The date of the patient's next recall. This date is used when you create recall letters (see "Creating Patient Recalls" for more information).
Recall Every	This is the interval of time that should pass before the patient is recalled again. You can allocate time in days, weeks or months.
Recall For	This is the reason that the patient should be recalled. This is taken from the "Recall Category" which can be configured by you (see "Working with Categories" for more information).
Do Not Recall Patient	This tick box indicates whether the patient should be included in recalls or not. By default a patient will always be included in the generation of recall documentation, however you have the option to exclude them from this by unticking this box.

The "Patient Recall History" in the bottom half of this page shows you every recall that has been sent to the patient, in what format it was sent, and when it was sent.

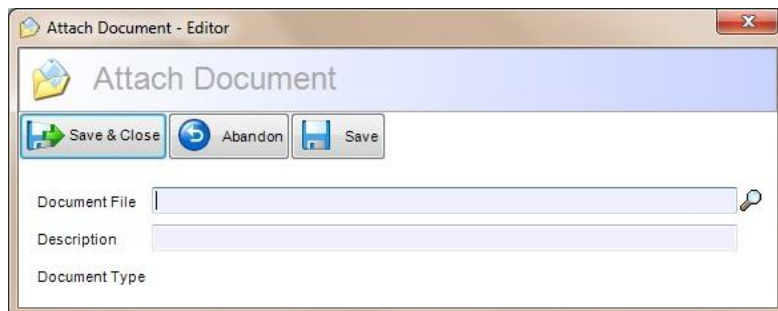
Patient Editor - Documents

This page displays the document manager in the patient record.



Documents created in other programs can be attached to the patient record, and some can be opened directly from the Comart Dental V5 program.

You can add an attachment by selecting the **“Add Attachment”** function. This will display the following dialogue.



You can enter the attached file manually or by browsing to it. Once the file has been specified you can also give it a brief description to serve as a reminder for what the file is.

If the file type is known it will automatically be displayed in the 'Document Type' field. Known files types can be opened directly from within the program as long as the originator software is located on the PC.

Documents can optionally be managed by the Comart Dental V5 program. Managed documents are copied to a local directory and serve as a backup. This ensures that if the document attachment is somehow deleted or corrupted, Comart Dental V5 will restore the backup when requested. Document management can be turned on or off in the Practice Setup section (see "Managing Your Practice Setup" for more information).

Any type of file may be attached to the record, however only the following files types can be opened directly from within the program...

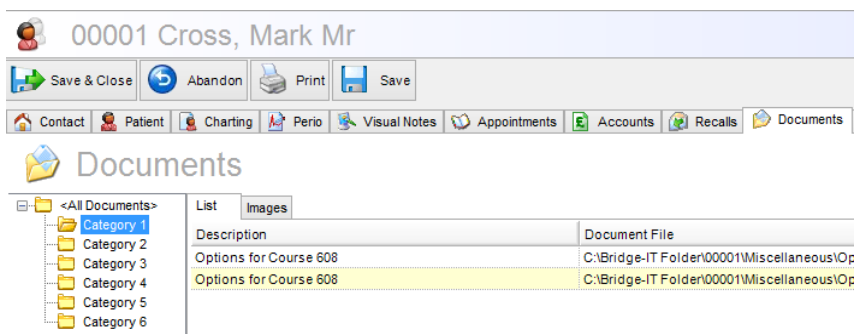
.doc, .dot	Document and template files created in Microsoft Word.
.xls	Spreadsheets created in Microsoft Excel.
.ppt	Presentations created in Microsoft Powerpoint.
.eml	E-mail files created by Outlook Express.

Files can be opened either by selecting "**Open Attachment**" or by double-clicking the selected row.

The documents section also houses a Comart Dental V5 extension that enables you to scan documents directly from a scanner into the patient record. This facility is described in more detail in the "**Comart Dental V5 Extensions**" section.

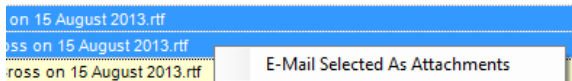
The document manager also allows the user to create multiple folders to attach different files to. This enables the practice to keep different types of documents separate from each other instead of all documents being in the same list. Documents can be dragged and dropped between folders to make organising documents easy and efficient. To create these folders, you will first need to go the "Category Management" section of the software. You must then click on 'Document Categories.' In this section, you can add any number of folders, and assign them names.

Once you have done this, you will see these various folders appear in the patient record. This is shown below:



Email Attachments

Once you have attached documents to the Patient Record, you can email those attachments to any Contact or Patient. To do this, just right click on the attachment and select “Email Selected as Attachment”. If you would like to send multiple attachments, simply hold down the CTRL button and select the attachments you wish to send. Once this has been done, you can right click and select the same option as before.



Patient Editor - Correspondence

This page displays a list of all the correspondence that has been sent to this patient...

Patient Editor - [Braithwaite, David Mr]

Save & Close
 Abandon
 Print
 Save

Contact
 Patient
 Charting
 Presc
 Visual Notes
 Accounts
 Appointments
 Recalls
 Documents
 Correspondence

Braithwaite, David Mr

General
 Waiting Room

Add Photograph | Delete Photograph

Define Patient Relationships

Correspondence History

Type	Description	Created Date
Recall	Letter sent to 51 Livingstone Road	02/02/2006
Recall	E-Mail sent to david.braithwaite@freeserve.co.uk	02/02/2006
Recall	SMS message sent to 07961822645	26/01/2006
Miscellaneous	SMS message sent	23/12/2005
Appointment Reminder	E-Mail sent	23/12/2005
Appointment Reminder	An Appointment Reminder was sent.	21/12/2005

Common Tasks for this Patient

Create Estimate
 Create Plan
 Charge Patient
 Make a Payment
 Raise Invoice

Track Treatments
 Create Quick Document
 Add PopUp Note
 View Consultation Notes
 Link to Radiography

Last Updated by Last Updated by Mr Michael Abbott on 14/02/2006 16:32:59

Whenever a patient recall, an appointment reminder or a miscellaneous message is sent, a record of it will appear in this list. This makes it easy to track when certain letters or other correspondence were sent to the patient.

Patient Editor - Education

This page displays a list of all the patient education animations or leaflets that have been shown to this patient...

The screenshot shows the 'Patient Education' window for 'Ottaway, Nina Mrs'. The window has a menu bar with options like 'Save & Close', 'Abandon', 'Print', 'Save', 'Charting', 'Perio', 'Visual Notes', 'Appointments', 'Accounts', 'Recalls', 'Documents', 'Correspondence', and 'Education'. The 'Education' menu is currently selected.

The main area displays a table of patient education records:

Type	Description	Created Date
Animation	Anterior Crown	02/06/2007
Leaflet	Bad Breath	02/06/2007
Animation	Veneers	07/06/2007
Animation	Adhesive Bridge (Fibre 1-Wing)	20/06/2007

On the right side, there is a 'Patient Details' sidebar with tabs for 'General' and 'Waiting Room'. The 'General' tab is active, showing a 'Patient Photograph' section with a placeholder image and buttons for 'Add Photograph', 'Delete Photograph', and 'Define Patient Relationships'.

At the bottom, there is a 'Common Tasks for this Patient' section with buttons for 'Create Estimate', 'Create Plan', 'Charge Patient', 'Make a Payment', 'Raise Invoice', 'Track Treatments', 'Create Quick Document', 'Add PopUp Note', 'View Consultation Notes', and 'Patient Education'.

Whenever an animation is shown or a leaflet is printed, a record of it will appear in this list. This makes it easy to track exactly what has been explained to the patient when treatments are planned for.

You can show an animation by simply highlighting a treatment being administered to the patient in the chart and then selecting **"Patient Education"** from the Common Tasks area at the bottom of the screen. Doing so will display this dialogue...

The 'Patient Education Selection' dialog box prompts the user to select a patient education task. It contains three radio button options:

- ☐ Show the animation for: Bridges
- ☐ Show the full patient education menu
- ☐ Print the leaflet for: Bridges

Allowing you to select the option of displaying an animation or printing a leaflet.

Patient Editor – Common Tasks

These are the common tasks for patients...

Create Estimate	<p>Creates an estimate for all outstanding treatments within a course. The estimate includes only treatments that are not yet complete i.e. planned, and includes full descriptions and prices.</p> <p>The estimate can be printed and given to the patient to take home with them.</p>
Create Plan	<p>Slightly different to the estimate, the treatment plan itemizes all treatments whether they have been completed or not. This is useful to show the patient not only forthcoming treatments, but also the treatments they have already had done.</p>
Charge Patient	<p>Charges the patient for any outstanding treatments that are now completed but have not yet been invoiced. Invoices are created on a course by course basis, therefore if you have treatments completed over various different courses, a dialogue will appear asking which course you wish to invoice.</p> <p>Outstanding treatments will be added to an invoice and displayed on the screen. Although you can add further items to the invoice, you cannot delete items from the invoice. You also cannot make changes to treatment prices at this point except through discounts.</p>
Make a Payment	<p>Accept a payment from this contact, create a credit note or give a refund.</p>
Track Patient Treatments	<p>Displays a screen that enables you view all treatments that have been administered to the patient. The data can be viewed in various ways, allowing you to sort and group information as required.</p> <p>You can also print the information once it is viewed in the way you wish.</p>
Raise Invoice	<p>Allows you to create a new invoice for this contact that is unrelated to the patient's treatments.</p>
Add Popup Note	<p>Creates a small on screen popup note. Once created, the note will always pop up on the screen of anyone who opens this patient record. These notes are useful for quickly communicating information to various departments e.g. a dentist indicates that the reception desk should ensure the patient pays before leaving.</p>


Create Quick Document	<p>Creates a document in Word using the current patient's details.</p> <p>You must first have set-up the document using the Comart Dental V5 "Document Creator". (see "Using the "Document Creator" for more information). When a quick document is created you can get the program to automatically name and save the document in a given directory by ensuring that the default save directory is set against the document and by ticking the "Automatically Save Quick Document to the Patient Record" option in the practice setup (see "Practice Setup – Documents" for more information).</p> <p>Note: For customers with the Signature Capture Module activated, you can send quick document letters to a tablet to be signed by the patient.</p>
Link to Radiography	<p>This common task will only appear in the list if you have set up the program to use a digital radiography system. You can access this in the practice setup area (see "Managing Your Practice Setup" for more information).</p> <p>Selecting this task will automatically open any images taken for this patient in either Schick or Trophy.</p> <p>Note: The 'Link to Radiography' function is also available through the appointment diary. To do this, find the appointment, right-click on the appointment, click the 'Functions' button and select the 'Link to Radiography' button.</p>
Patient Education	<p>This common task will only appear if you have acquired the patient education extension (see "Extensions – Patient Education" for more information).</p> <p>Selecting this task will open a dialogue allowing you to choose an animation or a leaflet to print from Medivision's educational software. Any leaflet printed or animation shown will automatically appear in the patient record under the "Education" tab.</p>

Patient Editor - Saving the Patient Record

Saving the patient record will store any changes that you've made in the Comart Dental V5 database. However, under some circumstances you will be presented with an additional dialogue when you save.

Whenever you open a patient record, if you visit one the critical pages, that is, the dental charting or the perio charting screen, upon saving the record you will be presented will a patient recall update dialogue that looks like this...

Update Session - Cartwright, Graeme Mr

 **Update Patient Session**

Message to Reception Desk

Please update patient email address before they leave.
Thank you

Patient Recalls

☒ Update dental recall from 31 / 03 / 2017 to 26 / 11 / 2017 Currently set to 17/01/2017

☐ Update hygiene recall from 31 / 03 / 2017 to 26 / 03 / 2018 Currently not set

Notify Reception

Send a notification to reception

Update Recall

Do Not Update Recall

Cancel

If you have updated the patient record, Comart Dental V5 assumes that the patient has been treated and that their recall information should be updated. If you are logged in as a dentist the "Update dentist recall date" will be ticked. Likewise if you are a hygienist, the "Update hygienist recall date" will be ticked.

The calculation of when the patient should next be recalled is based on the current date plus the recall time interval. You can of course override this date if you wish to or select "Do Not Update" if you do not want to update the recall information.

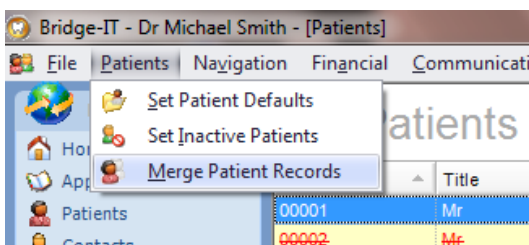
Notice there is also an option to send a quick message to the reception desk on this dialogue. Any message you type into this area will appear when the green tag is selected in the appointment diary. The green tags in the diary will only appear for those users logged onto the system as "Other" provider types.

Patient Editor – Merging Patient Records

There may be times where your practice has been working on two different Patient Records for the same Patient. When this occurs, you will need to use the 'Merge Patient Records' Function.

The first stage of the Patient Merge is to go into your Patient Database.

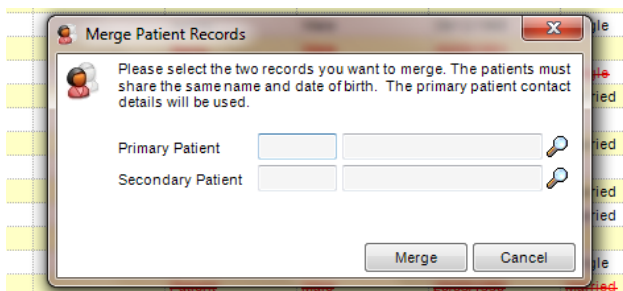
Once you are in your Patient Database, you will find a tab at the top of the page called 'Patients'. You will want to click on this button and you will find the option to 'Merge Patient Records'.



Once you have chosen this option, another window will come up, asking you to input the two Patient Records you wish to merge. It will ask you for a Primary Patient and a Secondary Patient.

Primary Patient – The Patient Record that you want to be left with. This is the main Patient Record. (Perhaps has the most work on it.)

Secondary Patient – This is the Record that will be DELETED once the merge has taken place.




Once you have located the two Records you wish to merge, (using the Magnifying Glass search tool) you will be asked to confirm your selection and confirm the merge. This will have successfully merged your two Patient Records.

The Contact Editor

The Contact Editor lets you create/view/edit all the information about a contact. Contacts are any person or company who are affiliated you're your practice, but who are not patients. There are various ways that you can access the Contact Editor, but probably the most common way will be by double-clicking on a Contact in the Contact Database grid.

Contact Editor - [Clippers Insurance Ltd]

Clippers Insurance Ltd

Save & Close

Abandon

Save

Contact

Appointments

Accounts

Documents

Title

First Name

Middle Name(s)

Last Name

Mr

John

Clipper

Address & Contact Details

Code

8440

Home Tel.

01908 310487

Company

Clippers Insurance Ltd

Business Tel.

01908 400600

Address

18 The Banks

Mobile

07961 463855

Fax

01908 400600

Town/City

Milton Keynes

Email

john.clipper@clippers.co.uk

County

Buckinghamshire

Web Site

www.clipperinsurance.co.uk

PostCode

MK13 7GH

Category

Insurance Company

Country

United Kingdom


Credit Limit

£1500.00


Is a Payor?


☒


Notes



Common Tasks for this Contact

Raise Invoice

Make a Payment

Create Quick Document

Last Updated by Hugo Armani on 14/08/2012 14:13:51

Each contact record has three pages in total...


- Contact Contact information for this contact
- Appointments A list of all of the patient's past and future appointments
- Accounts A history of all of the patient's financial transactions.

For more general help on using editors in Comart Dental V5, please see the topic **"Working with Editors"** in this manual.

Contact Editor – Contact Details

This page contains the contact's name, address, telephone numbers, e-mail addresses etc. There is also a Notes field which allows you to enter any other information about the contact you may wish.

Most of the details on this page are self-explanatory, however there are some fields which need further clarification and these are outlined below.

Code	Whereas the patient has a mandatory code, the code for a contact is not mandatory, but it is very useful for locating the contact very quickly.
Category	This field enables you to categorise your contacts. e.g. Insurance Companies and Parents who are not patient's. You can set-up the category list to whatever you want (see "Working with Categories" for more information).
Is a Payor	Further identifies the contact as a person or company that pays invoices on behalf of a patient. Whenever you are performing a "Find" action, you can narrow down the list to show only payors thus making the correct one easier to find.
Credit Limit	<p>This is the contact's credit limit. It is the amount that they are permitted to have financially outstanding before a warning is given. When a person or company goes over their credit limit, a flashing icon will appear at the top of the contact record, clearly indicating that this contact needs to make a payment.</p> <p>You can always see how much the contact owes by hovering your mouse over the icon.</p> 

Contact Editor – Appointments

This page shows you a list of this contact's appointments. It's useful to refer to this screen if the contact queries when their next appointment is.

This screen is the same as the Patient Editor. Please refer to the section "**Patient Editor – Appointments**" for more information.

Contact Editor – Accounts

The accounts page shows you a list of all of the invoices, payments, credits and refunds which have been made for this contact.

It also gives you a summary of their account balance. If a contact queries how much money they owe you, then a quick look at this screen will tell you all you need to know.

This screen is the same as the Patient Editor. Please refer to the section "**Patient Editor – Accounts**" for more information.

Contact Editor – Common Tasks

These are the common tasks for contacts...

Raise Invoice	Allows you to create a new invoice for this contact.
Make a Payment	Accept a payment from this contact, create a credit note or give a refund.
Create Quick Document	<p>Creates a document in Word using the current contact's details.</p> <p>You must first have set-up the document using the Comart Dental V5 "Document Creator". (see "Using the "Document Creator" for more information).</p>

The Staff Editor

The Staff Editor lets you create/view/edit all the information about a member of staff. This editor is accessible by double-clicking on a staff member in the Staff Database grid.

The screenshot shows a web-based form titled "Staff Member Editor - [Smith, Michael Dr]". The form is for editing the details of a staff member named Michael Dr. Smith. It includes fields for Title (Dr), First Name (Michael), Middle Name(s) (empty), and Last Name (Smith). There is a section for Address & Contact Details with fields for Address (23 High Street), Town/City (Bourne), County (Lincolnshire), PostCode (PE10 4TL), Country (United Kingdom), Home Tel. (01778123987), Business Tel. (empty), Mobile (07745687654), Fax (empty), and Email (michael.smith@dentist.co.uk). A checkbox indicates "This staff member is active". There is a large text area for Notes. At the bottom, there is a section for "Common Tasks for this Staff Member" with a link to "Create Quick Document". The footer shows "Last Updated by Dr Michael Smith on 31/03/2017 16:41:43".

Staff Member Editor - [Smith, Michael Dr]

Smith, Michael Dr

Save & Close Abandon Save

Contact Staff Access

Title First Name Middle Name(s) Last Name

Dr Michael Middle Name(s) Smith

Address & Contact Details

Address 23 High Street Home Tel. 01778123987

Town/City Bourne Business Tel.

County Lincolnshire Mobile 07745687654

PostCode PE10 4TL Fax

Country United Kingdom Email michael.smith@dentist.co.uk

☒ This staff member is active

Notes

Common Tasks for this Staff Member

Create Quick Document

Last Updated by Dr Michael Smith on 31/03/2017 16:41:43

Each staff record has three pages in total...

- Contact Contact information for this contact.
- Staff More personal details about this member of staff.
- Access Allows you to define the user name and password login details of the staff member as well as which security group this user belongs to.

For more general help on using editors in Comart Dental V5, please see the topic **"Working with Editors"** in this manual.



Staff Editor – Contact Details




This page contains the staff members name, address, telephone numbers, email address etc. There is also a Notes field which allows you to enter other information about this member of staff.




Staff Editor – Staff Details


This page contains further information about the staff member, as shown below...

Staff Member Editor - [Smith, Michael Dr]

 **Smith, Michael Dr** 

 Save & Close  Abandon  Save

 Contact  **Staff**  Access

 **Job Related**

Professional Title

Qualifications

Default Treatment

Contract Numbers

Contract Number	UDA Total	UDA Value	Type
9123450001	0	£10.00	Ortho
9123450001	1000	£21.00	Standard

Performer Number

UDA/UOA Start Date


☒ Provider Can Update Dental Recalls

☐ Provider Can Update Hygienist Recalls

☒ Provider Can Send Notification Tags


☒ Provider Can Receive Notification Tags

☒ List Staff Member in the Appointment Diary

 **Working Hours**

	Start Time	Finish Time	Lunch Start	Lunch Finish
<input checked="" type="checkbox"/> Monday	09 : 00	17 : 30	13 : 00	14 : 00
<input checked="" type="checkbox"/> Tuesday	09 : 00	17 : 00	13 : 00	14 : 00
<input checked="" type="checkbox"/> Wednesday	09 : 00	17 : 00	13 : 00	14 : 00
<input checked="" type="checkbox"/> Thursday	09 : 00	18 : 00	13 : 00	14 : 00
<input checked="" type="checkbox"/> Friday	09 : 00	17 : 00	13 : 00	14 : 00
<input type="checkbox"/> Saturday	09 : 00	17 : 00	13 : 00	14 : 00
<input type="checkbox"/> Sunday	09 : 00	17 : 00	13 : 00	14 : 00

Common Tasks for this Staff Member

 Create Quick Document

Last Updated by Dr Michael Smith on 31/03/2017 16:43:20

Here's a list of the fields on this screen...

Professional Title	Optional field to describe the staff member's job title.
Qualifications	Optional field highlighting the staff member's qualifications.
Provider Type	Allows you to specify the job the staff member has within the practice. The most important providers are dentists and hygienists whose role affects the way the program handles a number of functions.
Default location	<p>The place or room from which this staff member normally operates. This default is used when creating an appointment with this person, automatically using the default location set-up in here.</p> <p>Locations can be set-up by you (see "Working with Categories" for more information).</p>
NHS Contract Numbers	<p>Each provider can have multiple contract numbers if they wish both for standard dentistry and orthodontic contracts. To add new contract numbers, simply click on the yellow folder and add them in. You must select a single entry as the default one to use and also choose whether it is an orthodontic contract number.</p> <p>Please note, if you leave these the contract numbers blank the practice default one will be used for all providers (see "Practice Setup")</p>
NHS Performer No.	The performer number of the NHS dentist when logged on to the system. This number will be used when filling in the details for a claim.
Working Hours	The hours and days that the staff member works. This will be used in the "Appointment Diary" to display to reception when the staff member is available for appointments.
Active	Enables you to mark a staff member as no longer active. Inactive staff members are not shown in drop down fields where a staff member is required. However, they are kept on the system for reference purposes.

Staff Editor – Access

This page is only available to staff members who have security access (see "Configuring Security Access" for more information). From here you can set-up the log-in details for this staff member which consists of a user name and a password.

To increase security, you can also force the user to change their password after a set number of days. This will prompt the user automatically, after the time period you set it to do so.

You can also quickly set the security group that this person belongs to. This is the same setting as can be adjusted under the security area.

Staff Member Editor - [Smith, Michael Dr]

Smith, Michael Dr

Save & Close Abandon Save

Contact Staff Access

Program Access Details

Select a User Name and Password for this staff member. Please note, user names and passwords are not case sensitive.

User Name Password

User Must Change Their Password

Security Group Access

Select a Security Group below that this staff member belongs to. This determines the degree of access the user will have to the program. Security Groups can be managed by selecting Security from the menu.

Security Group

Inactivity Action

Select how the program should act when the staff member is inactive for a period of time.

Auto Log Off Auto Exit

Online Access

If you have the online diary module and you wish to allow this staff member access to the online diary select the box below.

☐ Staff Member Can Access Online Diary

☐ Patients Can Book Online with this Provider

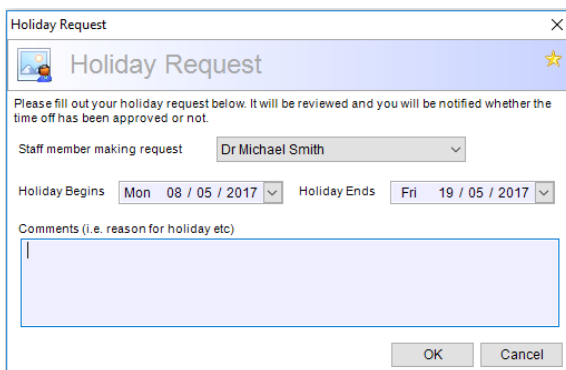
Common Tasks for this Staff Member

Last Updated by Dr Michael Smith on 31/03/2017 16:46:46

Holiday Management

Comart Dental V5 has the functionality to manage all staff holiday requests. You will find this section in the menu at the top of your page, under the “Staff” heading.

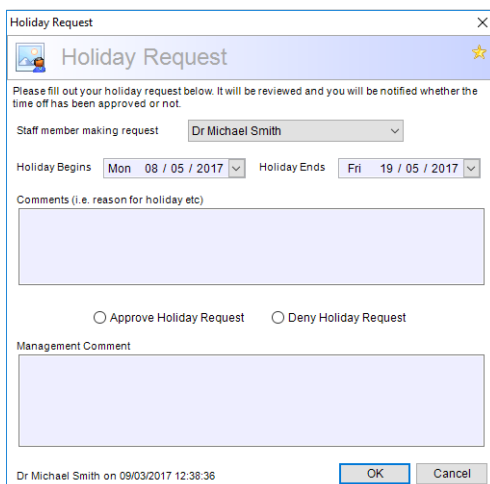
A ‘typical’ member of staff can then choose to either “Request a Holiday” or “Manage my Holidays”. When requesting a holiday, the following box will appear...



The screenshot shows a 'Holiday Request' dialog box. At the top, it says 'Please fill out your holiday request below. It will be reviewed and you will be notified whether the time off has been approved or not.' Below this, there is a dropdown menu for 'Staff member making request' with 'Dr Michael Smith' selected. There are two date pickers: 'Holiday Begins' set to 'Mon 08 / 05 / 2017' and 'Holiday Ends' set to 'Fri 19 / 05 / 2017'. A large text area for 'Comments (i.e. reason for holiday etc)' is present. At the bottom right are 'OK' and 'Cancel' buttons.

Once you have filled in the relevant fields, you can press the “OK” button to send the request to management. When you would like to check on the status of your request, you can use the “Manage my Holidays” functionality. This will show whether your holiday request has been approved, and will also show any notes made by management.

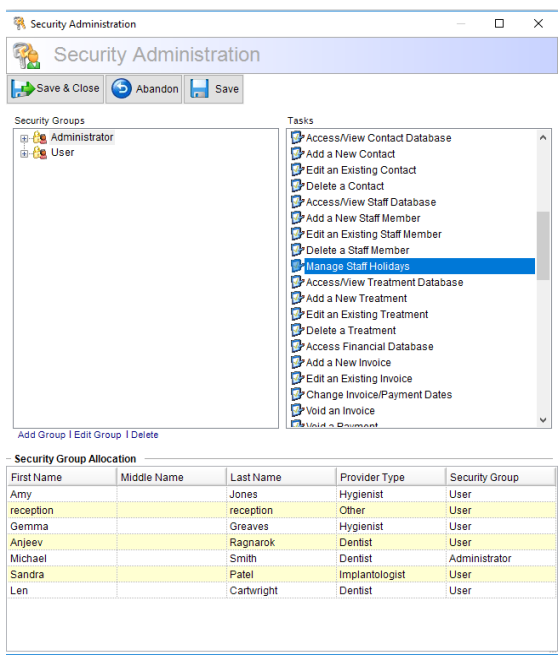
For staff members who can authorize holidays, they have an additional option under “Staff” in the top menu. They can click the “Holiday Management” button. This will show them all the requests that have come through from their staff. Once they open a request, they will see the following box...



This screenshot shows the 'Holiday Request' dialog box from a manager's perspective. It contains the same request details as the previous box: 'Dr Michael Smith' as the requester, dates from 'Mon 08 / 05 / 2017' to 'Fri 19 / 05 / 2017', and a large empty text area for comments. Below the comments area, there are two radio buttons: 'Approve Holiday Request' and 'Deny Holiday Request'. At the bottom, there is a 'Management Comment' text area. The footer shows 'Dr Michael Smith on 09/03/2017 12:38:36' and 'OK' and 'Cancel' buttons.

From here, they can approve or deny the holiday request, and input additional comments for their staff. Once you have updated the status of the request, Comart Dental V5 will automatically generate a message to inform your staff that a decision has been made, and they should check their “Manage my Holidays” section. If you have accepted the holiday request, Comart Dental V5 will also immediately take you to the ‘Appointment Blocking’ area, where you can instantly block out their diary.


Note: In order to have access to ‘Holiday Management’, you must first tell Comart Dental V5 who needs access to this section. (E.g. Managers, Owners) To do this, you will need to add a new security task to whatever security group they belong to. Please see the image below.










The Treatment Editor

As with all other editors, this screen allows you to view and/or edit the details of your treatments.

Treatment Editor - [F11] ✕

 **Treatment - F11** ★

 Save & Close  Abandon  Save

 Treatment  Prices  Price Increases  Notes



- Treatment Details

Code Shortcut Keys Ctrl + or Alt +

Description

Treatment Category ☐ Facial Consultation ☒ Fillings ☐ Free Consultation ☐ Hygiene Session

Treatment Graphic

Treatment Colour  

- Optional Monitoring and Information Recording

☐ Add Treatment to Easy Monitor in Charting Reminder Interval Months

Show More Info for

- Appointments Details

Dentist Time Required Hygienist Time Required

- Stock Items

☐ Quantity Item ☐ Manage Stock Levels Stock Quantity Stock Warning

- NHS Details

☒ This treatment can be administered under the NHS

Charge Band Clinical Data Set (FP17)

- Patient Education Details

Link to the Following Educational Animation

Link to the Following Educational Leaflet

Last Updated by Dr Michael Smith on 23/10/2014 10:13:41

A description of these fields appears in the following table...

Code	A unique code assigned by your practice to this treatment.
Description	The description of this treatment as it will appear on your invoice.
Treatment Category	The category of this treatment. This is used to narrow down the list when administering a treatment to a patient (see "Patient Editor – Available Treatments" for more information).
Treatment Graphic	The type of treatment that this product/service falls into. Determines how the treatment will appear on the dental chart when applied. More information on this shall be given a little later on.
Treatment Colour	The colour the treatment will appear on the patient's dental chart when applied.
Define Treatment Stages	When a treatment has various stages to it, such as taking impressions for dentures, fitting etc., you can define the various stages for the treatment by selecting this button. When the treatment is administered in charting, you can select the appropriate stage from a drop down box.
Dentist/Hygienist Time Required	The amount of time required to perform this treatment. Although not essential, this field is used when calculating the amount of time required for an appointment.
Quantity Item	If a treatment is marked as a "Quantity Item", when it is applied to a patient, a dialogue will appear asking for the number required. This is useful for being able to add more than one product/service at a time rather than having to add the same treatment more than once.
Manage Item Stock Levels	<p>When ticked, the program will automatically manage the amount of stock you have of this item. Whenever you use or plan to use one, the amount of stock will be reduced. Once the levels reach a low specified in the "Practice Setup", the user will be warned that the stock level is running low, or that you are out of stock altogether.</p> <p>You can enter the amount you have in stock in the field next to this which only becomes enabled when this box is ticked.</p>
NHS Details	This part of the dialogue will only appear if you have activated the NHS module. It allows you to specify

	<p>whether this treatment should be listed among NHS treatments and also gives you the ability to allocate a charge band to it.</p> <p>You can also allocate this treatment to a particular clinical data set which means that when you chart this treatment to a patient, the program will automatically calculate the appropriate entries for the data set on the NHS claim form for you.</p>
Patient Education Details	<p>Allows you to attach a suitable animation to the treatment. When administered to a patient you can quickly show the animation by selecting "Patient Education" from the patient record.</p>



Tip: It will save time and effort later if you create a treatment record for every item (or service) you provide including the cost information. This means that when you create invoices, Comart Dental V5 will already know the costs and be able to calculate totals for you.

The Treatment Graphic

There are eight different treatment types which are allocated by means of the graphic field. This field decides how the treatment will be used when it is applied to a patient's dental chart.

The following table examines the different types of graphics that can be used...

General	<p>This type of treatment affects the whole patient and is not related to specific teeth .e.g. a scale and polish or a Check-up.</p> <p>General treatments do not need to be assigned a colour since they do not appear on the patient's dental chart.</p>
Tooth Surface	<p>This type of treatment affects one or more tooth surfaces e.g. an amalgam filling.</p> <p>When you choose this graphic you can select which surfaces of a tooth are affected on the dental chart.</p>
Whole Tooth	<p>This type of treatment affects an entire tooth e.g. a gold crown.</p> <p>When you select this graphic and use it in the dental chart, the entire tooth is shaded in the "Treatment Colour".</p>
Tooth Root	<p>This type of treatment is applied to an entire tooth and symbolizes where the root of that tooth has had treatment e.g. a root filling.</p> <p>When this graphic is selected a coloured border appears around the treated tooth, allowing you to apply other treatments to the same tooth e.g. you might wish to perform a root treatment but also apply fillings to the same tooth.</p>
Implant	<p>This type of treatment affects an entire tooth and represents that an implant has replaced the original tooth. If the tooth is extracted first and then an implant put in its place, the implant is clearly shown on the perio chart.</p>
Bridge	<p>Of course this type of treatment applies to bridges.</p> <p>When used on a dental chart you can specify the range of teeth affected. You are also able to choose which teeth in the range are retainers, and which are pontics.</p>

Range	This is any type of treatment that applies to a range of teeth
-------	--

	<p>that is not a bridge e.g. a set of dentures.</p> <p>Like the bridge you can specify the range of teeth affected including both an upper and lower range.</p>
Tooth Extracted	<p>This treatment type speaks for itself, but it is not only used for teeth that are to be extracted, but also to teeth that are already missing.</p> <p>Because missing teeth are represented on the dental chart by removing the tooth altogether, no colour can be assigned to treatments using this graphic.</p>
Retained Root	<p>Sometimes although the tooth itself is removed the root is left in the gum. This graphic only removes the top of the tooth and leaves the root intact as a graphical representation of the treatment.</p>
Unerupted	<p>Allows you to create an item which essentially does the same as right clicking a tooth in the chart and choosing "Unerupted", however creating a treatment item is often quicker than right clicking on each unerupted tooth.</p>
Partially Erupted	<p>Same as above but applies to a partially erupted tooth.</p>
Sundry	<p>If the item is a sundry, such as a tooth brush or mouth wash, then select this graphic. This will enable you to quickly add the sundry item to an invoice if it is required.</p>
User Defined	<p>Allows you to select either a circle, square, triangle or text and specify the colour and size of the graphic. The text field has a maximum size of 4 characters.</p>

For further information on how these treatments are used in the patient's dental chart please see the section "Patient Editor – Charting".

The Treatment Editor – Prices

Treatment prices are highly configurable within Comart Dental V5. The prices page looks like this...

Treatment Editor - [XRay]

Treatment - XRay

Save & Close Abandon Save

Treatment Prices Price Increases Notes

– Treatment Prices

Price Schedule Default Pricing Structure Quantity

		Price 1	Price 2	Price 3	Treatment Cost
Up To	1	£20.00	£0.00	£0.00	£0.50
Up To	2	£35.00	£0.00	£0.00	£2.00
Up To	3	£50.00	£0.00	£0.00	£4.00
Up To	4	£60.00	£0.00	£0.00	£6.00
Up To	5	£70.00	£0.00	£0.00	£8.00
Up To	6	£80.00	£0.00	£0.00	£14.00

Last Updated by Dr Michael Smith on 11/02/2012 14:36:27

The following table explains what each field does...

Price Schedule	<p>Within Comart Dental V5 you can use the concept of "Pricing Schedules". Each schedule can hold prices for all of your treatments, therefore creating a new schedule is a means by which you can keep prices separate .e.g. if you wanted to set-up two pricing schedules, one for private treatments and one for NHS you could so using the pricing schedules. Comart Dental V5 comes with one price schedule as a default and under most circumstances this should be adequate for most practices.</p> <p>You can add additional pricing schedules in the "Category Management" area. (See "Working with Categories" for more information).</p>
Pricing Structure	<p>This field determines how the price will be calculated. There are ten different pricing structures. A detailed explanation of these structures follows after this table.</p>
Pricing Rows	<p>Each row is able to store a different price. This enables you to price differently where more than one of the same treatment is applied.</p>
Price 1, 2, 3	<p>Also known as "Pricing Levels", these columns enable you to have three different prices for the same treatment under various circumstances e.g. you may use Price 1 as the standard treatment price, Price 2 as price charged for children and Price 3 as the price charged for OAP's. You can decide how or even if you want to use these fields. If you only have one price for each, only use the Price 1 column.</p>
Treatment Cost	<p>This is the cost of the treatment to you.</p> <p>Although not mandatory, this field is useful for calculating profit margins for your practice.</p>

We will now examine the how to set the treatment prices in more detail...

Item	This is the most basic way of charging for a treatment. When you price a treatment by item, you are stating that the treatment always has one set value, even if you use two, three or more in the same appointment.
Jaw	<p>Use this method of pricing to achieve a sliding scale of prices for treatment applied to the whole jaw.</p> <p>Notice the 'Up To' boxes. Using these you can specify that a treatment is priced at such-and-such up to a certain number, then it is priced at such-and-such e.g. you may put 1 in the first 'Up to' box. This means that Price 1, 2 and 3 in that row will be used for the treatment when only one is used in the chart. In the next 'Up To' box you might put 3. Therefore if you apply two or three of these treatments the prices in the second row will be used. Using this pricing structure you can specify that one crown costs £50, but if two crowns are applied then the cost of each goes down to £40.</p>
Upper/Lower Jaw	This type of pricing structure is similar to Item, however it allows you to charge different prices depending on whether the treatment is applied to the upper or to the lower jaw.
Location	This type of pricing structure is usually chosen for treatments that apply to individual teeth. It allows you to charge different prices according to the type of tooth that is being treated e.g. a different price can be set for pre-molars, molars, incisors and canines.
Tooth	Again this pricing structure is often used for treatments that apply to individual teeth. Using the 'Up To' boxes, you can create a sliding scale of prices that assigns a price to each treatment according to the number that are applied.
Surface	This allows you to alter the pricing of a treatment according to the number of surfaces it covers. Of course you would normally use this pricing structure for fillings, where you charge a different amount for a filling that covers one surface, than you do for one that covers four. You can change the price for up to four surfaces per tooth e.g. you may charge £20 for a single surface, £25 for two, £30 for three etc.
Range	This pricing structure is used for treatments that cover a range of teeth. You would normally use this type of pricing for treatments such as dentures, or a bridge. Using the 'Up To' boxes you can change the price of the

	<p>treatment according to the number of teeth that are covered e.g. you may price a bridge that covers up to two teeth at £200, but a bridge that covers up to four teeth at £300.</p> <p>You should only use this type of pricing structure for treatments that use a graphic of either 'Bridge' or 'Range'.</p>
Course	<p>You use this structure when you want to price a treatment according to the number that are used in a single course. When the treatment is applied to a patient's dental chart, the program will check for the same treatment having been applied within that same course, and keep track of the number that has been used. You can then use the 'Up To' boxes to alter the prices accordingly.</p>
Appointment	<p>This pricing structure is identical to the Course method described above, except that it calculates the price according to the number of treatments within the same appointment.</p>
Quantity	<p>This pricing structure is used hand in hand with a treatment that has the "Quantity Item" checkbox ticked. When you use a treatment that is a "Quantity Item" in the dental chart, you are asked how many you wish to use. This pricing structure allows you to change the price according to that number e.g. You can charge £80 for one X-Ray, £75 each for two, £70 each for three etc.</p> <p>The "Quantity Item" field and the "Quantity" pricing structure are so closely linked, that if you try to use the one without the other, the program will warn you that it is not correctly set-up.</p>

Treatment Editor – Price Increases

You can automate an increase in prices for your treatments using this facility. The price increase page looks like this:

The screenshot shows the 'Treatment Editor - [XRay]' window with the 'Price Increases' tab selected. The window has a title bar with a close button. Below the title bar is a toolbar with 'Save & Close', 'Abandon', and 'Save' buttons. A tab bar below the toolbar shows 'Treatment', 'Prices', 'Price Increases' (selected), and 'Notes'. The main content area is titled 'Price Increase Policy' and contains three radio button options: 'Increase Prices Manually (no automated price increases)', 'Simplified Pricing Policy (increase all prices in the same way)' (which is selected), and 'Comprehensive Pricing Policy'. The 'Simplified Pricing Policy' section includes fields for 'Last Updated' (17 / 08 / 2012), 'Price' (0.00 %), 'Every' (0) 'Months', and 'Next Update' (/ /). The 'Comprehensive Pricing Policy' section includes a 'Price Schedule' dropdown set to 'Default' and three identical sets of fields for 'Price 1', 'Price 2', and 'Price 3', each with 'Last Updated', 'Price' (0.00 %), 'Every' (0) 'Months', and 'Next Update' fields. At the bottom of the window, a status bar reads 'Last Updated by Dr Michael Smith on 11/02/2012 14:36:27'.

There are 3 options for price increases:

Increase Prices Manually	Select this option if you want to adjust prices manually only.
Simplified Pricing Policy	Allows you to increase the price of this treatment by a set percentage every set number of months. This will affect all price schedules and all price levels for this treatment.
Comprehensive Pricing Policy	Allows you to individually set the percentage price increase for each price level within each price schedule. These can be applied at various time intervals.

Treatment Editor – Notes

The screenshot shows a software window titled "Treatment Editor - [XRay]". The window has a blue header bar with a stethoscope icon and the text "Treatment - XRay". Below the header is a toolbar with buttons for "Save & Close", "Abandon", and "Save". Below the toolbar is a row of tabs: "Treatment", "Prices", "Price Increases", and "Notes" (which is selected). The "Notes" tab is active, showing two sections: "Practice Notes (These notes will not appear on patient documentation)" and "Invoice Notes (These notes will appear on the patient invoice)". Each section has a large, empty text area for input. At the bottom of the window, a status bar displays the text "Last Updated by Dr Michael Smith on 11/02/2012 14:36:27".

The notes section for the treatment can store two types of notes. Practice Notes are used solely for internal purposes. They are pulled through into the treatments in the patient dental chart but do not appear on any documentation. Invoice Notes are pulled through into the patient's dental chart and will also appear below the treatment on invoices that are generated for the patient.



Tip: For standard invoice clauses you should not use the invoice notes section. Standard invoice clauses can be set-up in the Practice Setup section (see "Managing Your Practice Setup" for more information).

If the NHS module has been activated you will also see two option boxes saying “Private” and “NHS”. This can be used to further filter your treatments as only treatments that have been marked as available under NHS will appear when the NHS option box is selected.

Treatments Functions

Global functions that apply to all treatments are provided in the “Treatments” menu bar button:

- Select “Treatments” from the Navigation menu in the Side Panel
- Now, on the main menu bar at the top of the screen click “Treatments”

There are two options for you to use:

Check for Price Increases

Runs a price check. You need to have set up the appropriate price increases for your treatments before using this function (See: **The Treatment Editor**).

If any treatments are due to be increased you will now see the following window:

Price Increase Confirmation

Price Increase Confirmation

The program is about to perform the following price increase. Please confirm that the increase is correct.

Code

1000

Schedule

Default

Price Level 1

Current	£15.00	Increase %	2%	New Price	£15.30
	£20.00		2%		£20.40
	£25.00		2%		£25.50
	£40.00		2%		£40.80
	£50.00		2%		£51.00
	£100.00		2%		£102.00

Price Level 2

Current	£20.00	Increase %	3%	New Price	£20.60
	£30.00		3%		£30.90
	£40.00		3%		£41.20
	£50.00		3%		£51.50
	£60.00		3%		£61.80
	£110.00		3%		£113.30

Price Level 3

Current	£30.00	Increase %	4%	New Price	£31.20
	£40.00		4%		£41.60
	£50.00		4%		£52.00
	£60.00		4%		£62.40
	£70.00		4%		£72.80
	£120.00		4%		£124.80

Do you wish to confirm this price increase?

Yes

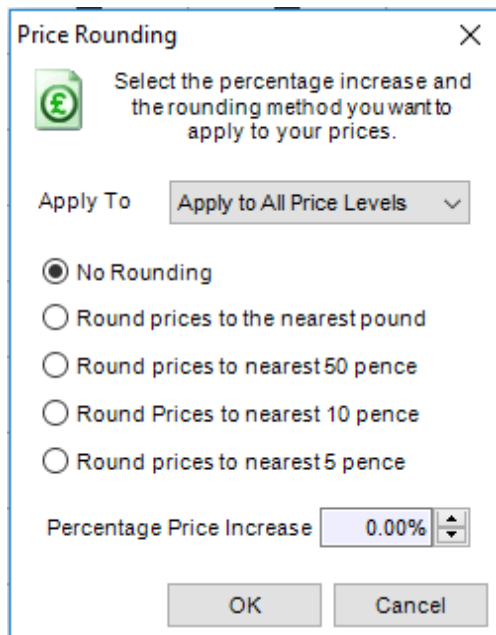
Yes to All

No

This window informs you of the price increase that is being proposed prompts you to check that the changes are acceptable. If you want to check each price increase individually select “Yes”, and go through them one at a time. To confirm that Comart Dental V5 should increase all the proposed changes to all prices immediately without prompting, select “Yes to All”. To stop the price increases from taking place select “No.”

Globally Increase Prices

Globally increases the prices of treatments uniformly:



The image shows a 'Price Rounding' dialog box with a green pound coin icon. The text inside says 'Select the percentage increase and the rounding method you want to apply to your prices.' There is a dropdown menu labeled 'Apply To' with 'Apply to All Price Levels' selected. Below this are five radio button options: 'No Rounding' (selected), 'Round prices to the nearest pound', 'Round prices to nearest 50 pence', 'Round Prices to nearest 10 pence', and 'Round prices to nearest 5 pence'. At the bottom, there is a 'Percentage Price Increase' field with '0.00%' and a spin button. 'OK' and 'Cancel' buttons are at the bottom right.

You can apply price increases to individual price levels using the “Apply To” drop down, or leave the default value and apply the increase to all price levels. You are given the option to round your prices, this avoids prices being increased to exact values and cleans up your price list. Type in the amount of increase you would like in the Percentage Price Increase field and press OK to finish.

Rounding example:

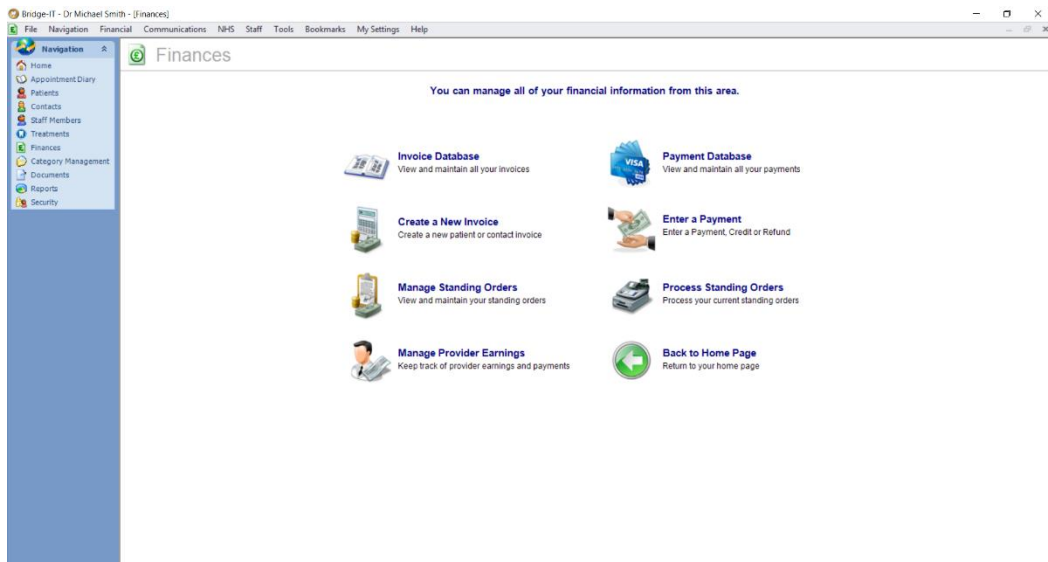
A £170 treatment increased by 7% would ordinarily produce a new price of £181.90. Rounding the prices to the nearest pound would produce a value of £182.



Tip: To increase prices for individual treatments, apply the price increase in the Treatment Editor and use the Check for Price Increases function above (See: **The Treatment Editor**).

Comart Dental V5 Finances

The Finances page in Comart Dental V5 gives you access to all of the financial functions available in the program.



From here, there are three database grids available...

- Invoices
- Payments
- Manage Provider Earnings

Additionally, there are two editors available...

- Create a New Invoice
- Enter a Payment

There is also two options relating to Standing Orders...

- Manage Standing Orders
- Process Standing Orders

Finally, there is a link back to the Home Page.

Invoices and Payments (and Credits and Refunds)

As mentioned towards the start of the user guide (see “Terminology” for more information) it is important to understand the relation between Invoices and Payments.

On the surface it may seem that the way Comart Dental V5 handles finances is a little complex, but the design has been carefully thought out to give maximum flexibility in tracking your practice’s finances.

What is an invoice?

An invoice is a bill. It has a date and time, a recipient and its purpose is to say “this person owes our clinic x amount for these products or services”.

What is a payment?

A payment is when someone pays your practice in response to an invoice.

A payment may be for one invoice, several invoices (e.g. payment of £40 could be for 2 invoices of £20 each) or even part of an invoice (e.g. £10 paid against a £20 invoice).

The terminology for this is that payments are **allocated**, **part-allocated** or **unallocated**.

Allocated	This payment is fully allocated against one or more invoices e.g. a £20 payment against a £20 invoice.
Part-Allocated	Only part of this payment is allocated – e.g. a £20 payment is allocated against a £10 invoice, hence £10 of the payment is still unallocated.
Unallocated	This payment has not been allocated at all.

In the same way, invoices are said to be paid, part-paid or unpaid.

Paid	There are one or more payments assigned to this invoice which cover it e.g. a £20 invoice with 2 x £10 payments against it.
Part-Paid	A payment has been made against this invoice, but there is an outstanding amount e.g. a £20 invoice has one £10 payment, hence £10 is still outstanding.
Unpaid	No payments have been made against this invoice, hence it is still outstanding.

This method of allocating payments against invoices is incredibly flexible and can handle all kinds of situations:

Example

Mrs Smith comes in for a series of 5 treatments at £20 each over the coming weeks. She wants to pay £100 up front.

- Take a payment for £100 – this will completely unallocated. Her account is now £100 “in credit”.
- After the first treatment an invoice is created for £20.
- Comart Dental V5 informs you that she is in credit and automatically allocates part of the £100 payment against the first £20 invoice.
- Mrs Smith is now £80 is credit.
- The process is repeated, until after 5 treatments her account balance is £0.

Thus, keeping the payment and invoice trail separate (but linked via allocation) gives you a very clear picture of what money is coming in and why.

What is a credit?

A credit is like a payment in that it is an amount that is allocated against an invoice, with the difference that no actual money changes hands.

Example

You run a promotional offer for £10 off an initial check-up (which is normally £30). Mr Brown comes to your clinic in response to this offer. He pays £20 and hands over the £10 “gift certificate”...

- The invoice is created for £30.
- A payment is taken for £20 and allocated against his invoice. The invoice is now part-paid with £10 still outstanding.
- A £10 credit is created for Mr Brown and allocated against the same invoice. The invoice is now paid in full.

Comart Dental V5 knows the full amount should have been £30, but that only £20 was paid, and £10 was credited. This also means that later on you could find out how much business the “promotion” brought in, and how much it cost your practice.

What is a refund?

A refund is when the practice actually hands money back to a customer which appears as a negative payment.

Example

- You sell an electric toothbrush to Miss White and charge her £20 for the purchase.
- An invoice is created for £20.
- The invoice is paid in full by a single cheque for £20.
- Miss White's Account Balance is £0, however a few days later she returns to the practice informing you that the toothbrush has broken down and she would like to have her money back.
- When she returns the broken toothbrush, you create a refund for £20 and hand over £20 in cash.

Comart Dental V5 thus accurately tracks the monies coming into AND going out of your practice and the reasons why.

Voiding An Invoice

To maintain financial integrity, Comart Dental V5 stores all transactions permanently, that is, you cannot delete invoices, payments, credits or refunds once they have been created. If an invoice is created in error, or becomes invalid for any reason, you can choose to "Void" the invoice.

To do this, from the main menu at the top of the screen select **"Financial"** and then **"Void Transaction"** from the drop down menu. This will display the following dialogue:

Void Transaction

Void Invoice

Key in the invoice number that you would like to void. This will reset the patient treatments for this invoice back to uncharged.

☒ Void an invoice ☐ Void a payment/credit ☐ Void a refund

Invoice Number 2

Invoice Recipient Mr John Clipper

Invoice Date 17/08/2012

Course Number

Total Amount £90.00

OK Cancel

To void an invoice:

- Ensure the option button is set to **'Void an invoice'**
- Type the invoice number into the "Invoice Number" field
- Select OK.
- The invoice will then no longer be included in any financial calculations, however it will remain on the system for reference purposes only.

In the "Invoice Database", a voided invoice will appear in red with a red line through the middle of it.

Voiding a Payment/Credit

Voiding a payment or a credit is virtually identical to voiding an invoice. If a payment is made by mistake i.e. a wrong amount is taken, or the wrong person is credited with the payment, then you will need to void the payment.

To do this, from the main menu at the top of the screen select **"Financial"** and then **"Void Transaction"** from the drop down menu. This will display the following dialogue...



Void Transaction

Void Payment

Key in the payment or credit number that you would like to void. This will cancel any payments made towards affected invoices.

☐ Void an invoice ☒ Void a payment/credit ☐ Void a refund

Payment Number: 1

Payer: Mr John Clipper

Payment Date: 17/08/2012

Reference:

Total Amount: £90.00

OK Cancel

To void a payment, click on the **"Void a payment/credit"** option, key the payment or credit number into the "Payment Number" field and select OK.

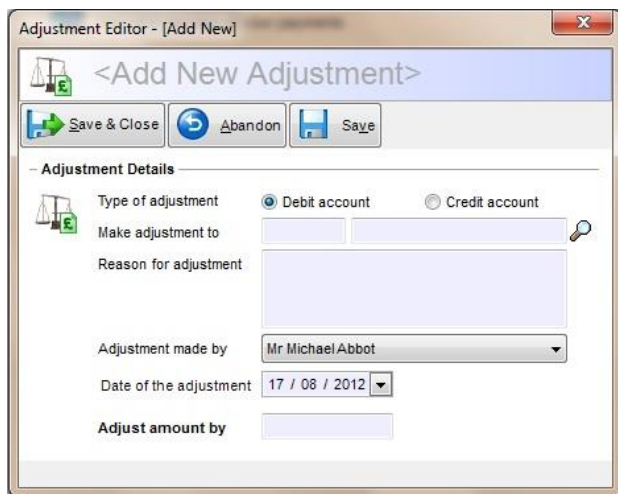
The payment will then no longer be included in any financial calculations, although it will remain on the system for reference purposes only.

In the "Payment Database", a voided payment or credit will appear in red with a red line through the middle of it.

Making a Financial Adjustment

For various reasons you may find that a patient's account balance no longer reflects their true standing. This may be because of a special promotion that your practice running, or perhaps an unforeseen financial situation that has occurred with a client. In this case you can always make a financial adjustment to redress the patient's balance.

To do this, from the main menu at the top of the screen select **"Financial"** and then **"Adjust Financial Account"** from the drop down menu. This will display the following dialogue...



The following table describes the various fields used in this editor...

Type of Adjustment	Determines whether the client is going to be debited or credited a certain amount to their account.
Make Adjustment To	The patient or contact whose account should be adjusted.
Reason for Adjustment	A permanent notation of why the adjustment is being made. Since all transaction is permanent there should always be good reason for making an adjustment to a patient's finances.
Adjustment Made By	The staff member who is making the adjustment.
Date of the Adjustment	The date when the adjustment is being made.
Adjustment Amount By	The amount by which the persons account is going to be either debited or credited.

An adjustment becomes part of the persons permanent financial record and will show up in the accounts tab of the patients or clients record (see "Patient Editor - Accounts" for more information).

Printing Statements

To keep your patients apprised of their current financial standing, you can create statements itemising their invoices and payments over a given period. To print statements, from the main menu at the top of the screen, click on the "Financial" item, and then "Print Statements". The following dialogue will appear...


Send	Code	Title	First Name	Last Name	Town	Postcode	Balance
<input type="checkbox"/>	28	Mr	David	Brathwaite	Daventry	NN12 5JK	
<input type="checkbox"/>	8440	Dr	John	Clipper	Milton Keynes Clipper T...	MK13 7GF	
<input type="checkbox"/>	29	Mr	James	Carr	Northampton	NN12 7GH	
<input type="checkbox"/>	30	Miss	Jennifer	Brathwaite	Daventry	NN12 7GH	
<input type="checkbox"/>	32	Mrs	Sandra	Genockey			
<input type="checkbox"/>	33	Mrs	Tracey	Noble	Daventry	NN11 6JH	
<input type="checkbox"/>	36	Mr	Harry	Noble	Daventry	NN11 6JH	
<input type="checkbox"/>	37	Miss	Susan	Noble	Daventry	NN13 5TB	
<input type="checkbox"/>	38	Dr	Edward	Hilbert			
<input type="checkbox"/>	39	Mr	Charles	Dorkin		NN12 8HN	
<input type="checkbox"/>	40	Mr	Paul	Westhead	Daventry	NN11 6JH	
<input type="checkbox"/>	42	Miss	Caroline	Atkins		BH6 7RH	
<input type="checkbox"/>	43	Ms	Denise	Oakey			
<input type="checkbox"/>	44	Mr	Alan	Jeffreys			
<input type="checkbox"/>	45	Mrs	Susan	Jenkins			
<input type="checkbox"/>	47	Mrs	Joanne	Osbourne			
<input type="checkbox"/>	48	Mrs	Shelah	McMahon			
<input type="checkbox"/>	49	Mrs	Amanda	Simone			
<input type="checkbox"/>	50	Mrs	Georgina	Dickinson			
<input type="checkbox"/>	51	Mr	Michael	Rogers	Braunston	NN12 4YJ	

Select All | Select None | Select Balance < 0

To create a statement for a particular patient, simply tick their "Send" box, and then specify the time period you want to cover. You can calculate only those patients who owe money by pressing the "Calculate Balance for All Patients" button. Once this is complete you can simply select the "Select Balance < 0" option at the bottom of the screen to only tick those patients who have an outstanding balance.

Pressing the "Create Statements" button will allow you to select the printer you want to print the statements from.

Statements are not viewable in the same way as many other documents in the program in order to make the printing process as fast as possible.

 **Tip:** You can sort the statements grid in any way you like by pressing the left mouse button on the columns headers.

Managing Standing Orders

From the Comart Dental V5 Finances page you can create and manage patient standing orders. This provides you with the functionality to take monthly payments from your patients who are on some kind of in-house plan.

To create a new standing order select “Manage Standing Orders” from the screen and click on the “Add” link at the bottom of the dialogue that appears. This will display the following screen...

Standing Order

Add the details for the standing order into the boxes below. If a corresponding invoice is raised the persons balance will remain unchanged.

Patient: 00004 Ms Caroline Firstlady

Start Date: Fri 17 / 08 / 2012

Finish Date: Fri 17 / 08 / 2012 ☐ No End Date

Payment Day: 5

Payment Method: Standing Order

Amount:

☒ Raise a corresponding invoice for payments received

☒ Raise an invoice even when a payment is missed

OK Cancel

The following table describes the various fields used in this editor...

Patient	The patient you want to create a standing order for.
Start Date	The starting date of the standing order.
Finish Date	The finish date of the standing order. If the SO has no end date, tick the “No End Date” box.
Payment Day	The day of the month the standing order is paid.
Payment Method	You can create a new payment method category to identify that this is a standing order payment.
Amount	The amount the patient is paying on a monthly basis.
Raise Invoice tick box	If you want to raise a corresponding invoice against the payment made, tick this box. Essentially this keep the patients balance at zero.

Processing Standing Orders

Whenever you want to process your standing orders, select “Process Standing Orders” either from the Manage Standing Orders dialogue or from the main “Finances” page. You will then be presented with a list of possible payments made by the patient and you then tick the payments that have been made into your account. Please ensure that you tick all the relevant payments as once the month has been processed and if you don’t tick a payment to state that it was received, Comart Dental V5 will assume it was not received and move onto the next month.

Provider Earning and Payment Tracker

You will notice that there is a ‘Manage Provider Earnings’ section within the “Finances page”. This gives you the ability to calculate Provider earnings on a month-by-month basis. To use, select the Staff Member you would like to calculate, and then press the “Calculate Earnings For...” button. This will calculate the earnings, starting with the previous month. This is what will appear...

Provider Earnings - Smith Dr Michael	
November 2013	
Amount Earned During Month	£0.00
Amount Paid by Patients when Provider was Paid	£0.00
Amount Carried Forward from Previous Months	£0.00
Amount Paid by Patients to Current Date for Above Month	£0.00
Amount to Base Providers Payment On	£0.00
Amount Paid to Provider	£0.00

Amount Earned During Month – The total invoiced amount for that provider for the specified month.

Amount Paid by Patients when Provider was Paid – The total amount paid towards the invoiced amount up to the time the provider is actually paid.

Amount Carried Forward from Previous Months - If any invoices have been paid in the past months that were not included previously in the providers payment, these will be carried forward from those months to now.

Amount Paid by Patients to Current Date for Above Month - The total amount paid towards the invoiced amount for the specified month up to the current date.

Amount to Base Providers Payment On - This is the actual figure you should use when calculating the providers payment for the month. It is based on the information displayed above and includes all payments for previous unpaid invoices that have been carried forward to the current month.



Tip: Please note, once you enter the amount paid to the provider and select ‘OK’, that amount is locked and cannot be changed afterward. The figures have to be locked so that subsequent calculations are always correct.

The Invoice Editor

The invoice editor allows you to create/view/edit invoices in Comart Dental V5. Invoices can be created in a number of different ways...

- From an Appointment in the Diary.
- From the Finances screen by clicking **"Create a New Invoice"**.
- By selecting **"Add New invoice"** from the Invoice Database.
- By selecting **"Charge Patient"** from the Patient Record.

Invoice Editor - [Add New]

<Add New Invoice>

Save & Close Abandon View Print Save

- Invoice Details

Invoice Number: 3
Description: Invoice
Invoice Date: 17 / 08 / 2012
Staff Member: Mr Michael Abbot

- Recipient/Patient Details

Recipient:
Patient:

- Invoice Items ☐ Show All Treatments

Qty	Description	Unit Value	Net Value	V.A.T %	Tax Amount	Total Value
1		£0.00	£0.00	0.0	£0.00	£0.00

Delete Invoice Line Discount % 0 Discount £0.00

Notes

Net Total £0.00
VAT Total £0.00
TOTAL £0.00

- Payments & Credits for this Invoice

Number	Date	Reference	Taken By	Amount
--------	------	-----------	----------	--------

Amt Outst
Total Paid

The following table describes the various fields used in this editor...

Invoice Number	A unique number identifying this invoice. The program will automatically create a number for you.
Invoice Date	The date and time that the invoice was created.
Staff Member	The staff member creating this invoice.
Recipient *	The person or company to whom this invoice is going.
Patient *	The patient the invoice relates to. Normally this will be the same as the recipient, but for an insurance company it may be different e.g. BUPA may pay the bill for Mr Jones – hence while he is the patient, BUPA is the invoice recipient).
Invoice Items	The list of treatments that about to be invoiced.
Discount %	The percentage discount given to the recipient.
Net Total	Total of all lines of the invoices.
VAT Total	Total of the VAT if applied.
TOTAL	Net Total + VAT Total.
Payment & Credits for this Invoice	Described in detail below.
Notes	Any additional notes that you want to appear on the invoice.

- If you create the invoice from an appointment or from the patient editor, these fields will automatically be filled in for you.

Invoice Editor – Adding Lines to An Invoice

When adding a new invoice you can add invoice lines by simply entering into the top empty line in the grid.

Under the description column you can either select an item from the Treatments Database, or type in your own item description.

Invoice Items							<input checked="" type="checkbox"/> Show All Treatments
Qty	Description	Unit Value	Net Value	V.A.T %	Tax Amount	Total Value	
1		£0.00	£0.00	0.0	£0.00	£0.00	
	Abscess						
	Amalgam Filling						
	Amoxicillin Antibiotic						
	Apicectomy						
	Bone Graft Lower Jaw						
	Bone Graft Upper Jaw						
	Bridge						
	Chlorhexidine Antibiotic						

There is no limit to the number of lines you can add to an invoice – just keep typing into the add row at the top of the grid. You can delete a newly added invoice line by clicking in it and pressing **"Delete Invoice Line"**. Note that invoice line items that have been created using the "Charge Patient" function in the Patient Editor cannot be deleted.

Once you are happy with the invoice then you can save it by clicking **"Save & Close"** or cancel any changes by clicking **"Abandon"**.

For more general help on using editors in Comart Dental V5, please see the topic "Working with Editors" in this manual.

Invoicing Sundries

You can make the prices for a sundry item such as a toothbrush or mouth wash automatically come through into the invoice when you add an item by setting up a treatment in the following way.

First, sundries must have their graphic set to general. This means that they cannot be applied to the chart and have no graphical representation. Secondly, under the pricing tab, the treatment must have its pricing structure set to "Item".

If a treatment is set up in this way, when you select it from the drop down list in the add line area of the invoice, the price will automatically be brought in from the database.

Invoice Editor – Payments & Credits for this Invoice

At the bottom of the invoice is an extra payments section as shown below...

Payments & Credits for this Invoice						
Number	Date	Reference	Taken By	Amount	Amt Outst	£0.00
1	17/08/2012		Armani Hugo	£90.00	Total Paid	£90.00

This part of the screen shows you how much has been paid against the invoice, how much is outstanding and the list gives details of any payments or credits which have been allocated against this invoice. Voided payment and credits will appear in red with a red line through them in this section.

The Payment Editor

The payment editor is very versatile and allows you to create or view payments, credits and refunds. There are a number of different ways to access the Payment Editor...

- From an appointment in the Appointment Diary
- From a patient's record by selecting **"Make a Payment"**
- From the Finances screen by selecting **"Enter a Payment"**
- From the Payments database by selecting **"Add a New Payment"**

Payment Editor - [Add New]

<Add New Payment>

Save & Close Abandon View Print Save

Payment Details ☒ Payment ☐ Credit ☐ Refund

Person making the payment 00004 Ms Caroline Firstlady

Date of the payment 17 / 08 / 2012 Time 13 : 14

Payment method Credit/Debit Card

Payment reference (optional)

Person accepting the payment David Allen

Total amount paid £85.00 Allocate this Payment

Invoice Allocation

Pay	Date	Number	Patient	Total	Outstanding	Allocated
<input checked="" type="checkbox"/>	17/08/2012	5	Ms Caroline Firstlady	£235.00	£235.00	£85.00
<input type="checkbox"/>	17/08/2012	6	Ms Caroline Firstlady	£185.00	£185.00	£0.00

Select All | Select None

Firstly, notice that towards the top right there are three options: Payment, Credit, Refund.

This tells Comart Dental V5 what type of transaction you are entering.

The Payment Editor – Fields

Who is making the payment?	This corresponds with the recipient of the invoice.
Date of the Payment	The date and time that the payment was made.
What is the Payment Method?	A category choice- usually cash, cheque or credit card (these can obviously be edited). This field is irrelevant for credits.
Payment Reference	An optional reference e.g. a cheque number.
Who is taking the payment?	The staff member involved in this transaction.
The amount being paid	The amount of money changing hands.

Allocating the Payment

Notice that this screen also shows a list of outstanding invoices for this payment. In the previous screenshot, you can see that Mr David Braithewaite has three outstanding invoices totalling £268.

You have two ways of paying off these invoices. The first method is to simply tick the **"Pay"** box of the invoices the patient would like to settle. The amount paid will automatically be calculated as you tick or untick each box.

What though if the patient wants to make only a part payment towards their outstanding balance? This is where the **"Allocate Payment"** feature comes in.

On this occasion he would like to pay £120 by cash. Clicking the **"Allocate Payment"** button allocates £90 to invoice 101, thereby settling it, and the remaining £30 to invoice 102, which will leave £120 outstanding on that invoice.

Of course this is a more complicated example than will normally be the case. If patients pay promptly, there will only usually be ONE outstanding invoice in the list which will be fully paid by the payment you are entering. But this example does show the flexibility of the system.

The **"Allocate Payment"** feature is most useful if you are happy to let the system decide which invoices to pay. It will simply pay off the oldest invoice first.

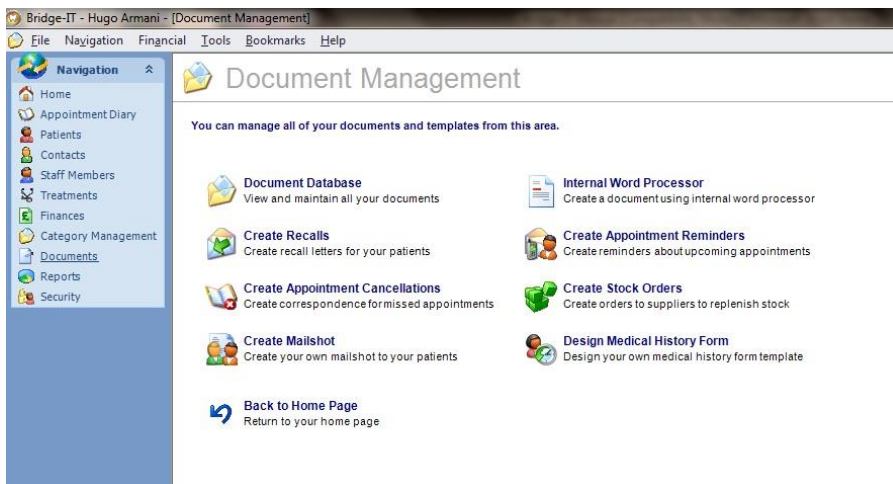
As usual "Save & Close" will save the payment details while clicking "Abandon" will cancel it. Once a payment has been created it cannot be deleted.

Comart Dental V5 Documents

There are two ways to print merged documents within Comart Dental V5. The easiest way is to use the built in Word Processor. You can turn this on by selecting "File/Practice Setup", then visiting the "Documents" tab and ticking the "Use Internal Word Processor" option.

At various points in the program, it is possible to merge data from Comart Dental V5 with a Word Template. For example, creating recall letters, or creating a Quick Document from within a patient record.

The Documents page in Comart Dental V5 gives you access to all of the document functions available in the program.



From here, you can access the following functions

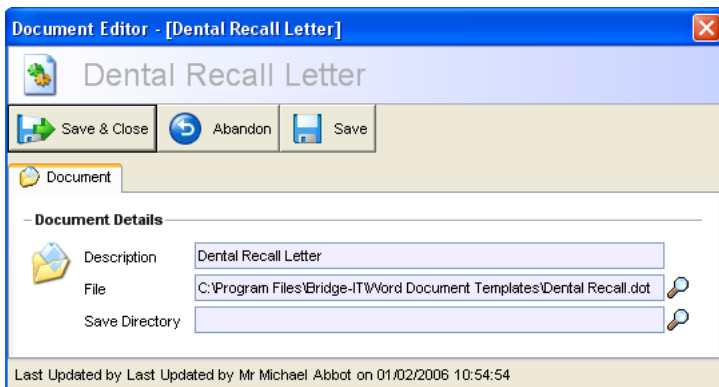
- Document Management
- Internal Word Processor or Document Creator
- Create Patient Recall Letters
- Create Patient Appointment Reminders
- Create Stock Re-Ordering Documents
- Design Your Medical History Document

Finally, there is a link back to the Home Page.

Document Management

This is how you inform Comart Dental V5 where certain documents reside. These are normally Word Templates that have either come as standard with the program, or have been created by your practice.

To add a new template, choose **"Add New Document"** from the Comart Dental V5 side panel. This will display the following window...



Use the **"Browse"** button with the magnifying glass to locate the document template and then give the template a description. The description is what will appear in lists when you want to choose this template, so it needs to be something that you will recognize.

You can also use the magnifying glass next to the "Save Directory" to select a default directory for where you want this document to be saved. This directory is used when you have set up the program to automatically save quick documents (see "Practice Setup – Documents" for more information).

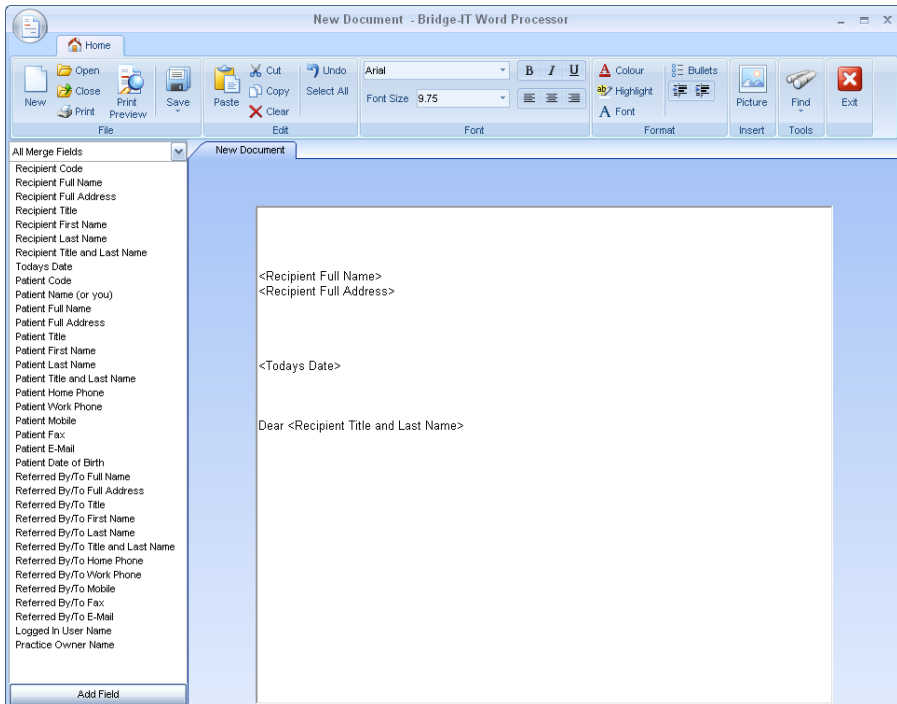
Pressing the **"Save"** button will add the document to the list.

From the Document Management screen, you can likewise edit or delete existing document definitions.

The Internal Word Processor

The internal word processor has all of the basic functions of a standard word processor.

Opening the processor will display this dialogue...



When you create a new document you can see all the possible merge fields on the left hand side of the screen. Position the cursor where you want a particular field to appear in the document and then double-click the field on the left. It will then be transferred to your document.

Note that there are different fields for different types of documents.

<All Merge Fields> - Used for any quick document.

<Appointment Cancellations> - Shows only fields that can be used on cancellation documents.

<Appointment Reminder> - Shows only fields used on appointment reminder letters.

<Recall> - Shows only fields used on recall letters.

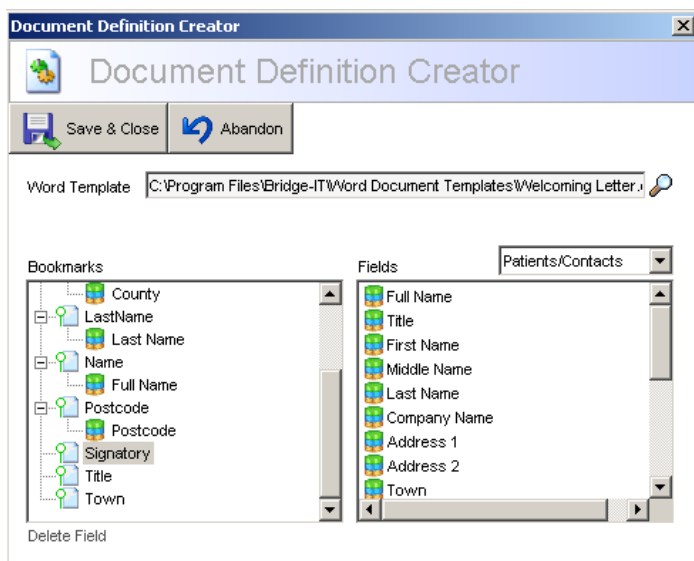
<Mailshot> - Shows only fields that can be used on mail shots.

The Document Creator

Instead of using the word processor built into Comart Dental V5, you can elect to use Microsoft Word instead (although this should never be necessary and is not recommended). This area allows you to specify which fields in Comart Dental V5 should be allocated to the bookmarks found in a Word document template.

To create a new document for Comart Dental V5 to use, first create the template from within Word, placing bookmarks in the text at relevant places. You can name the bookmarks whatever you wish, but they should be descriptive enough for you to recognize.

Once the template exists, select Document Creator from Comart Dental V5. This will display the following dialogue...



Firstly, you need to specify the location of your new template. Use the "Browse" button with the magnifying glass to find the template you have just created. Once chosen you will see the bookmarks defined in the template appear in the "Bookmarks" list to the left of the window. In the right are all of the fields that you can use in creating a new document such as names, address details etc. There are two types of field listings, those for Patients and Contacts and those for Staff Members. Obviously you select these according to the type of document you are creating, whether it be an internal or an external letter.

To tell Comart Dental V5 which fields you would like to appear against which bookmark, left-click the relevant field in the right list and, holding down the left mouse button, drag the field over the bookmark to which it needs to be assigned

and let go. You will see the field appear below the bookmark and the two are now linked.

Please note that only ONE field can be allocated to each bookmark.

Once you have finished select "Save" and a Comart Dental V5 Definition File (BDF) file will be created and placed in the same directory as the template.

In the future, whenever you print this template from the program, Comart Dental V5 will merge the fields assigned with this document to create the final letter.

Creating Patient Recalls

At regular intervals you will need to recall your patients for check-ups and additional treatments. The Patient Recall system within Comart Dental V5 ensures that none of your patients ever slip through the net.

Every patient has an allocated next recall date both to see the dentist and/or the hygienist. These dates are updated whenever the patient pays you a visit (see "Patient Editor – Recalls" for more information).

Using the Patient Recall function, Comart Dental V5 scans the patient records and is able to generate recall letters for every one of these.

Selecting "Create Recalls" from the Documents page will display the following window...

Patient Recalls - 7 Records

Create Recalls Print Grid Close

Recall List E-Mail Options Letter Options SMS Options Send Status Settings For First Recall

Recall Filter

Start Date 31 / 03 / 2017 End Date 30 / 08 / 2017 Provider <All Dentists> Patient Group <All Patient Groups>

Letter	E-Mail	SMS	Recall Date	Last Date	Code	Name	Home Phone	Mobile	E-Mail	Booked	Date
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	16/06/2017	13/02/2016	00012	Griffiths, Nathalie Miss				<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	13/08/2017	15/02/2016	00799	Jackson, James Mr				<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	17/08/2017	18/02/2016	00008	Muscroft, Maria Mrs				<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	26/04/2017	28/10/2016	00019	Mann, Lawrence Mr				<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	13/08/2017	15/02/2016	00018	Thickpenny, Ruth Oppe...				<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	13/08/2017	15/02/2016	00015	Lampert, Peter Master				<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	24/08/2017	24/08/2016	00822	Williams, Alisha Mrs				<input type="checkbox"/>	

Select Preferred | Select All Letters | Select All E-Mails | Select All SMS | Select None | Open Patient

☒ Exclude Patients with Booked Appointments

Common Tasks for Recalls

Create Labels Automate Recall Settings Reset Displayed Recalls

The fields on this dialogue are explained in the following table...

Start Date	The start date of the range that Comart Dental V5 will use to look for patients to recall.
End Date	The end date of the range that Comart Dental V5 will use to look for patients to recall.

Provider	Allows you specify which staff members patients should be recalled. You can either create letters for: <ul style="list-style-type: none"> • All Dentists • All Hygienists • Any single Staff Member
Grid	Displays all of the patients matching the search criteria specified above.
E-Mail Tab	Contains the format of the e-mail that will be created if this option is chosen.
Letter Tab	Contains the letter template and method of creating the letter by interfacing to Microsoft Word. The "Document Template" will list all of the documents that have been set-up in the Document Management area (see "Document Management" for more information).
SMS Tab	Contains the format of the SMS text message that will be created if this option is chosen.
Send Status Tab	Provides a listing of whether or not the creation of each recall was successful. If a problem occurred, its reason will be detailed in this area.

Once you have set the criteria for creating the recall documents the patients matching these criteria will be displayed in the central grid. You can select which patients you wish to generate recall letters for by ticking the 'Recall' column in the relevant row of each patient. If you are sending a letter, ensure that the "Document Template" is set to the recall letter template that you wish to base your recalls on. If the correct template is not shown in this drop down selection, you will need to add one to the document management area (see "Document Management" for more information). Generating the letters will perform whatever function you have chosen in the Document Options. These are explained in the following table...

Save	Creates the reminder letters and also saves them using unique names. Comart Dental V5 will save the documents in the directory set-up in the Practice Setup screen (see "Managing Your Practice Setup" for more information).
Print	Prints the letters for you using the default printer.
Close	Closes the document after performing one or both of the functions described above.

Once all of the criteria are set you can produce your recall documents by pressing the "Generate Letters" button.

Creating Patient Appointment Reminders

Shortly before a patient appointment is due you may wish to send them a reminder. This can be achieved in two ways within Comart Dental V5, either by letter, e-mail or by mobile phone text message if you have purchased the text messaging module (see "SMS Text Messaging" for more information).

Selecting "Create Appointments Reminders" from the Documents page will display the following window:

Appointment Reminders

Appointments Reminders - 5 Records

Create Reminders Close

Send E-Mail Options Letter Options SMS Options Send Status

Start Date: 05 / 03 / 2007 End Date: 12 / 10 / 2007 Provider: <All Staff Members>

Letter	E-Mail	SMS	Date	Time	Code	Name	Home Phone	Mobile	E-Mail	Treatment	Status
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	17/05/2007	10:10	28	Mr David Brathwaite	01327 876553	07961 822645	david.brathwaite@frees...	Crown Additions	Cancelled By ...
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	28/06/2007	10:00	37	Miss Susan Noble				Emergency Swel...	Cancelled By Us
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	28/06/2007	13:10	30	Miss Jennifer Brathwaite		07297 474736		Bridge Prep	Cancelled By ...
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	29/06/2007	14:10	32	Mrs Sandra Genockey			lee.ottaway@tedsfdfdfc...	Examination	Pending
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	29/06/2007	14:50	00119	Mrs Nina Ottaway		07971 822731	nina@leeottaway.plus.com	Crown Fit	Pending

Select Preferred | Select All Letters | Select All E-Mails | Select All SMS | Select None ☒ Exclude Additional Reminders for Patients with Multiple Appointments

Common Tasks for Appointment Reminders

Create Labels Automate Reminder Settings

The fields on this dialogue are explained in the following table...

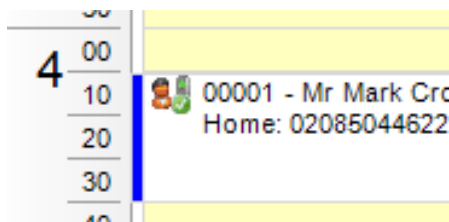
Start Date	The start date of the range that Comart Dental V5 will use to look for patient appointments.
End Date	The end date of the range that Comart Dental V5 will use to look for patient appointments.
Provider	Allows you specify which staff members patients should be reminded. You can either create letters for: <ul style="list-style-type: none"> All Dentists All Hygienists Any single Staff Member
Grid	Displays all of the patients matching the search criteria specified above.

E-Mail Tab	Contains the format of the e-mail that will be created if this option is chosen.
Letter Tab	Contains the letter template and method of creating the letter by interfacing to Microsoft Word. The "Document Template" will list all of the documents that have been set-up in the Document Management area (see "Document Management" for more information).
SMS Tab	Contains the format of the SMS text message that will be created if this option is chosen.
Send Status Tab	Provides a listing of whether or not the creation of each appointment reminder was successful. If a problem occurred, its reason will be detailed in this area.

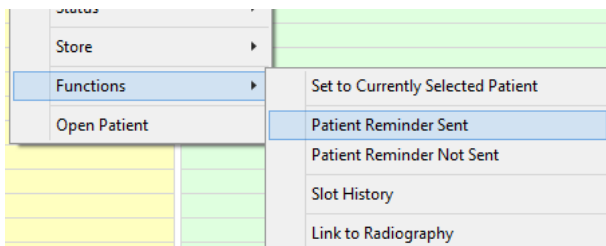
Once you have set the criteria for creating the appointment reminders, the patients matching these criteria will be displayed in the central grid. You can select which patients you wish to generate recall letters or e-mails for, or if you have the SMS Text Message module you can optionally select whether you want to send a mobile text message instead. If you are sending a letter, ensure that the "Document Template" is set to the appointment reminder template that you wish to use. If the appropriate template is not shown in this drop down selection, you will need to add it in the document management area (see "Document Management" for more information). Generating the reminders by pressing the "Create Reminders" button will either produce a letter, an e-mail or a text message depending on your selection. If a letter is created, Comart Dental V5 will perform whatever function you have chosen in the Document Options. These are explained in the following table...

Save	Creates the reminder letters and also saves them using unique names. Comart Dental V5 will save the documents in the directory set-up in the Practice Setup screen (see "Managing Your Practice Setup" for more information).
Print	Prints the letters for you using the default printer.
Close	Closes the document after performing one or both of the functions described above.

Once a reminder has automatically been sent to a patient, a small icon will automatically appear on their appointment in the appointment diary. This will make it clear who has been sent a reminder, without having to open the patient record.



If you contact the patient manually by telephone or in person, you can manually add the icon to the appointment. Once this has been done, the system will know not to send an automatic reminder to the patient. To do this, right-click on the appointment, go to 'Functions' and then press the 'Patient Reminder Sent' button. You can see this below.



Automating Appointment Reminders

You can make the program send your appointments automatically at a specified time of day using the “Automate Reminder Settings” found in Common Tasks area at the bottom of the Appointment Reminders screen. Selecting this option will display the following dialogue...



The image shows a Windows-style dialog box titled "Automate Reminders". Inside, there is a section titled "Automatic Settings" with a small icon of a person and a clock. Below this, there are several options and settings:

- ☒ Automatically Send Reminders
- Create Reminders At: 03:30 PM (with a time picker icon)
- Create Reminder Letters: 6 Days in Advance (with a dropdown arrow)
- Create Reminder E-Mails: 2 Days in Advance (with a dropdown arrow)
- Create Reminder SMS: 1 Days in Advance (with a dropdown arrow)
- ☒ Ignore correspondence preferences and send letters, e-mails and texts where possible.
- ☒ Prompt user before creating reminders
- ☒ Always use this PC for sending reminders

At the bottom right, there are two buttons: "OK" and "Cancel".

The fields on this dialogue are explained in the following table...

<i>Automatically Send Reminders</i>	Tick this box if you want to send reminders automatically.
Create Reminders At	The time of day when the reminders will be created.
Create Reminders n Days in Advance	Allows you to specify how many days in advance you want to send reminders to your patients. For instance a letter may not reach them for a few days.
Ignore Correspondence Preferences	Ignores the correspondence preference set in the patient record under the "Patient" tab and uses whatever selection is chosen above.
Prompt User Before Creating Reminders	Allows the user to specify whether they want the automated reminders to be created when the time of day arrives. If this box is left unticked, no prompt will be shown and the reminders will be created (useful if you want reminders to run overnight).
Always Use This PC for Sending Reminders	Normally only one machine is dedicated to printing off and sending reminders to patients. Only select this box on the one PC that you wish to use for sending the reminders.



Tip: The PC being used to send reminders must be left on and the program must be activated (i.e. a user must be logged in) for the reminders to be automatically created.

Creating Stock Orders

This function allows you to create stock orders to your suppliers for re-ordering supplies...

Re-Order Stock Items

Re-Order Stock Items

Generate Order

Close

Order Details

Supplier

Order Number

Treatments

Order	Code	Description	Order Qty	Stock Qty	Price
-------	------	-------------	-----------	-----------	-------

Select All | Select Below Stock Level | Select None

Document Template to Use

Re-Order Stock Template

The fields on this dialogue are explained in the following table...

Supplier	The supplier that will be used to take name and address details from. The list of suppliers defaults to coming from your contact list, so it assumes that you have setup your suppliers already in the Contacts database.
Order Number	Your order reference for the document.
Treatments	A list of all treatments from the Treatments Database for which "Manage Stock Levels" is ticked (see "The Treatment Editor" for more information) and which are below the Minimum Stock Level assigned in your Practice Set-up (see "Managing Your Practice Setup" for more information).
Document Template to Use	This will list all of the documents that have been set-up in the Document Management area (see "Document Management" for more information).

To create an order, simply tick the treatments from the list that you would like to re-order in the "Order" column and choose a supplier and order number. Pressing the "Generate Order" button will automatically create the order for you using the details selected.

Designing the Medical History Form

You can design a medical history document for your practice using the “Design Medical History” function. Selecting this option will display the following screen...

The screenshot shows the 'Form Designer' application window. On the left is a 'Field Types' panel with icons for Label, Text Box, Check Box, Option Box, and Signature Box. The main canvas on the right is titled 'Medical History' and contains a form with the following elements:

- A header instruction: "Please complete this form by ticking the appropriate boxes and answering the questions with notes if needed. All details you give are strictly confidential. If you are not sure of any of these questions, please ask the dentist."
- A question: "Do you have or have you ever had?"
- A list of medical conditions with corresponding Yes/No radio buttons:
 - Rheumatic fever
 - Heart complaints, heart surgery or stroke
 - Diabetes
 - Epilepsy or fainting attacks
 - Chronic Bronchitis or asthma
 - Hepatitis
 - HIV Positive
 - Joint Replacement
 - Treated with hydro-cortisone or corticosteroids
 - Excessive bleeding
 - High blood pressure
 - Operations in the past 2 years
 - Any other serious illness
- Two more questions with Yes/No radio buttons:
 - "Do you carry a warning card?"
 - "Are you pregnant?"
- A text box for "Please list any medicines or tablets you are currently taking"
- A text box for "Please list any allergies you have including medicines, tablets, substances and latex"
- A section for alcohol and smoking consumption with input fields:
 - "What is your average consumption of alcohol per week?"
 - "How many days in a week do you have more than 8 units?"
 - "Do you smoke? If so, what is your average per week?"
 - "How many years have you smoked for?"
- A text box for "Name and address of your doctor:"

On the left is a box that contains a list of field types and on the right is your canvas. To design your medical history form, you can simply drag and drop the different types of controls from the “Field Types” box onto the canvas. The different types of fields are described below...

Label	This type of field should be used to hold standard text on your forms that is non-editable. Labels are used for titles or for labelling text boxes to identify what they are. Labels are editable when they are placed on the canvas, however when you are actually collecting data within the patient record they are non-editable.
Text Box	Text boxes are used to collect written information within the form. For example if you wished to type free text into a box about the patients former treatments you would use a text box. Text boxes are blank when you place them onto the canvas and only become editable when the medical form is opened for collecting data within the patient record.

Check Box	Check boxes are labels that give the patient the ability to tick whatever applies to them personally.
Option Box	Option boxes give the patient the ability to answer Yes/No questions in the form.
Signature Box	The signature box creates space on the form for the patient's signature. Please note that you will need to unlock the Signature Capture optional module for this to work.

Once a field has been dragged to the canvas and is selected, you will also gain access to the “Field Properties” area. This allows you to exactly position and size the control, change the font type and size that is used and also change the text that should appear in the control (for labels and check boxes). For both check and text boxes you can also cause the field to activate an alert when certain criteria are met. e.g. when a check box is ticked you may want to raise a medical or infectious alert. In a similar way you can raise an alert for a text box if any text is written into it.

Fields on the medical history form can also be made mandatory. This means that the user must enter data into these fields. You can also add a functionality that prompts an alert in the patient record if data is entered into certain fields. You can see this below...

The screenshot shows the 'Form Designer' application window. At the top, there are buttons for 'Save & Close', 'Abandon', and 'Print'. Below these is a 'Field Types' section with a list of controls: Label, Text Box (selected), Check Box, Option Box, and Signature Box. The 'Text Box' is highlighted. Below the field types is the 'Field Properties' section for the selected 'Text Box'. It shows position and size settings: Left (449), Top (601), Width (120), and Height (20). There are also three checkboxes with a warning icon: 'Raise infectious alert if box contains text', 'Raise medical alert if box contains text', and 'Make this field mandatory'. All three checkboxes are currently unchecked.

Once you have designed the form you should save and close it. You can then access your medical history document from within the patient record in the medical details area (see “Patient Editor – Contact” for more details).

NHS PR Forms

When you create an appointment for an NHS patient, enter the exemptions as you normally would, then at the bottom of the appointment select the “Create PR Form” function. Add any extra details you require to the form and press OK.

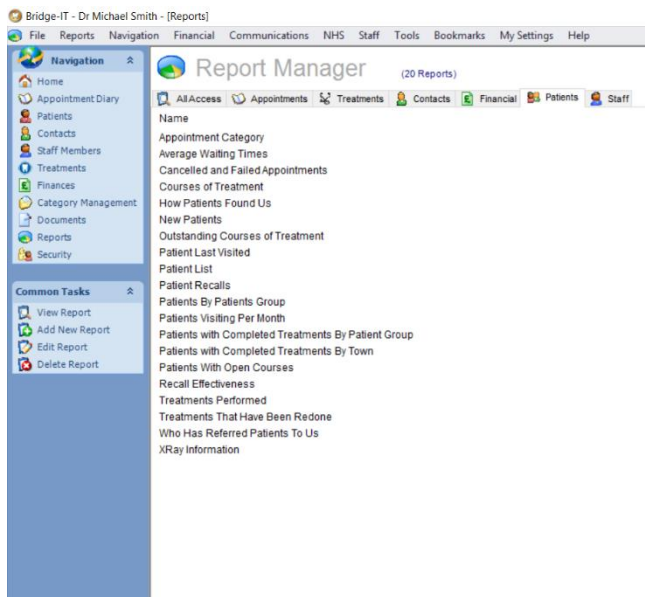
PR Form - Practice Record Form - Patient Declaration		NHS CLAIM FOR FREE OR REDUCED COST NHS DENTAL SERVICES	
<p>ONE FORM MUST BE COMPLETED FOR EACH COURSE OF TREATMENT</p> <p>This form is to be retained in the Dental Practice unless requested by the NHS or another authorized body.</p>			
<p>PATIENT INFORMATION (TO BE COMPLETED BY THE DENTAL PRACTICE)</p>			
<p>Provider name, address and location number</p> <p>Dr Michael Smith My Dental Practice 100 Main Road Shrewsbury SH41 7NH</p>		<p>SURNAME (in CAPITALS)</p> <p>CROOS</p>	
<p>11111</p>		<p>FORENAME (in CAPITALS)</p> <p>MARK</p>	
<p>Date of Birth</p> <p>13/10/1995</p>		<p>Date of acceptance</p> <p>23/07/2014</p>	
<p>Evidence of residence/exemption not seen</p> <p><input checked="" type="checkbox"/></p>		<p>YOU MUST READ THIS FORM BEFORE YOU SIGN IT. ONLY SIGN IT IF IT IS CORRECT.</p> <p>The patient is responsible for the accuracy of this claim. NOT the dental practice.</p> <p>If you are not certain that you are entitled to receive free or reduced cost NHS dental services you MUST pay at the dental practice. If you subsequently confirm that you were entitled to free or reduced cost dental services, you can claim a refund. If you have applied for a qualifying benefit or exemption certificate but have not received it yet, you must pay and claim a refund when it does arrive.</p> <p>Routine checks are carried out on claims including claims where evidence of entitlement is shown to the dental practice. If you are found to have wrongly claimed free or reduced cost NHS dental services, you will have to pay a penalty charge of up to £100. You will not have an opportunity to pay for the services first to avoid the penalty.</p> <p>a) I am entitled to free NHS dental services because <u>on the first day of treatment:</u></p> <p><input checked="" type="checkbox"/> I am under 18 years of age.</p> <p><input type="checkbox"/> I am 18 years of age and in full time education</p> <p><input type="checkbox"/> I am pregnant</p> <p><input type="checkbox"/> I had a baby in the last 12 months (date baby due/born)</p> <p><input type="checkbox"/> I am currently in prison or a young offender's institution</p> <p>b) I am entitled to free NHS dental services because during the course of treatment I, or my partner, receive:</p> <p><input checked="" type="checkbox"/> Income Support (incapacity benefit and Disability Living Allowance does not count)</p> <p><input type="checkbox"/> Income-based Jobseeker's Allowance</p> <p><input type="checkbox"/> Council Tax Benefit (does not count)</p> <p><input type="checkbox"/> Income-related Employment & Support Allowance</p> <p><input type="checkbox"/> Pension Credit Guarantee Credit</p> <p><input type="checkbox"/> Personal Credit Guarantee Credit</p> <p>These are the ONLY benefits that entitle you to free NHS dental services. Other benefits such as Council Tax Benefit, Housing Benefit, receipt of State/Private Pension, NHS Prescription Charge Medical Exemption Certificate or any other benefit does not count.</p> <p>c) I am entitled to free NHS dental services because I am named on one of the following certificates that is valid during the course of treatment:</p> <p><input type="checkbox"/> HC2 Certificate</p> <p><input type="checkbox"/> NHS Tax Credit Exemption Certificate (Card)</p> <p>(You are not automatically entitled because you receive Tax Credits. There are qualifying conditions. If you qualify you will be sent an exemption certificate.)</p> <p>d) I am entitled to reduced cost NHS dental services because:</p> <p><input type="checkbox"/> I am named on a HC2 certificate that is valid during the course of treatment which limits the amount I have to pay to £</p> <p>I confirm that the information I have given above is correct and complete and that I am entitled to free or reduced cost NHS dental services as above. I understand that I will have to pay a penalty charge of up to £100 if it is not correct and am not entitled.</p>	
<p>THE REMAINDER OF THIS FORM MUST BE COMPLETED BY, OR ON BEHALF OF, THE PATIENT</p>			
<p>PATIENT DECLARATION (TO BE COMPLETED FOR ALL PATIENTS)</p> <p>I declare that the dental provider named above, or their representative, to examine me under the NHS and to give me any necessary care and treatment that I am willing to undergo within NHS arrangements.</p> <p>I agree to pay the statutory charges for the NHS dental services I receive, unless I have completed a valid claim for free or reduced cost NHS dental services over and over, and that I may have to pay the FULL amount prior to treatment.</p> <p>I agree, if necessary, to be examined and/or to have my dental records examined by the NHS Business Services Authority or other authorized body.</p> <p>I declare that the information I give on this form is correct and complete. I understand that if it is not appropriate action may be taken against me. To enable the NHS to prevent and detect fraud and incorrectness, I consent to the disclosure of relevant information to and by the NHS Business Services Authority, NHS England, Department of Work & Pensions, HM Revenue & Customs and local authorities.</p>			
<p>Signature</p> <p></p>		<p>Date</p> <p>23/07/2014</p>	
<p>If you are signing for the patient give details below</p> <p>Name (in CAPITALS)</p> <p></p> <p>Relationship to patient</p> <p></p>			
<p>What is your ethnic group?</p> <p>Please choose ONE selection from this list to indicate your ethnic group.</p> <p><input checked="" type="checkbox"/> White British</p> <p><input type="checkbox"/> White Irish</p> <p><input type="checkbox"/> White Chinese</p> <p><input type="checkbox"/> White Indian</p> <p><input type="checkbox"/> White Pakistani</p> <p><input type="checkbox"/> White Bangladeshi</p> <p><input type="checkbox"/> Other White</p> <p><input type="checkbox"/> Asian or Asian British</p> <p><input type="checkbox"/> Black or Black British</p> <p><input type="checkbox"/> Black or Black African</p> <p><input type="checkbox"/> Black or Black Caribbean</p> <p><input type="checkbox"/> Other Asian</p> <p><input type="checkbox"/> Other Black</p> <p><input type="checkbox"/> Chinese</p> <p><input type="checkbox"/> Any other ethnic group</p> <p><input type="checkbox"/> Patient declined</p>			



PLEASE NOTE: You must purchase the signature module to receive a digital signature pad that the patient can sign on. This will then be stored against the patient record under the ‘Documents’ tab. Once the module has been purchased, you are also able to attach a Tablet to the network, allowing the patient to fill in and sign their own forms on the tablet.

The Report Manager

Comart Dental V5 allows you to print out reports containing useful information about your practice. Clicking "Reports" from your Home Page or on the left hand side panel will take you to the Report Manager.



As you can see, along the top of the screen there are tabs containing different types of reports (appointments, financial, patients etc.) Clicking on a tab will list the relevant reports underneath.

Most reports will be set-up when the software is first installed, however during the course of your use of Comart Dental V5 you may request additional reports from Fusion Software. These can be created exactly according to your requirements.

Adding a New Report

To add a new report definition, first click on the relevant tab so that you can add the report to that list. Note that this is not essential, however it is a good idea to categorize your reports in this fashion since it makes them easier to find. Then select **"Add New Report"** from the side panel...

The following table describes briefly what each of these fields is for...

<i>Name</i>	The name of the report as it will appear in the reports list.
Description	A brief description created by you that describes the type of report being created. This is an optional field.
File Path	The location of the report (.repX) file.
Display Filter Dialogue	Enables you to display a data filtering mechanism for any report. You can then filter by the various criteria as they appear on the report e.g. dates, names, amounts etc.

Once you have located the file, the report name will automatically be filled in with a default report name. You can of course rename this to whatever you wish.

Tick the box "Display Filter Dialogue Before Launching Report" if you want to be able to define various criteria that define whether data will be viewed in the report or not. This is described in more detail in the next section.

Specifying Report Criteria

If you have requested that a report shows you the filter dialogue you will see this window whenever it is run...

Report Filter

Selection Criteria
Your report can be filtered by up to four fields in using various selection criteria.

Filter first by: Patient Joined Between 01/01/2016 and 11/03/2017 ☐ Show All Values

then by: Patient Group Equals PRIVATE ☐ Show All Values

then by: <None> <None> ☐ Show All Values

Sorting
Your report can be sorted by up to three fields in either ascending or descending order.

Sort first by: Last Name in Ascending order

then by: <None> in Ascending order

☐ Only show summary information where possible

Reset OK Cancel

This allows you to set criteria for which records you want to include in the report. You can select a report field in the "Filter First By..." drop down, then choose an operator such as "Equal to" or "Greater Than" and then finally a value.

The operator will automatically adjust to the type of field that is being viewed. For example you can perform certain functions on numeric fields such as "Less Than" or "Greater Than" that cannot be performed on string fields e.g. the patient name.

The value will adjust to reflect the values found for that field in the database.

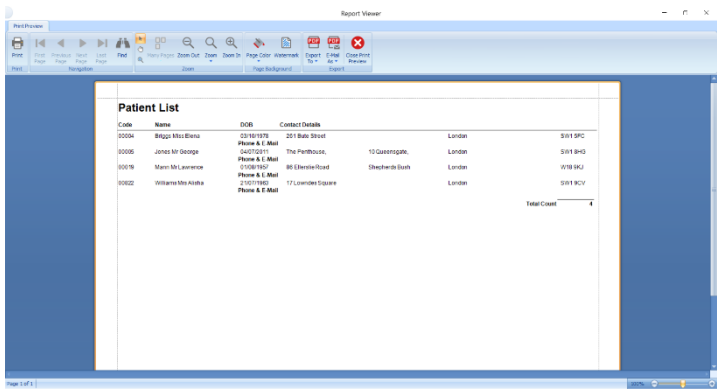
Notice you can also sort the report by the various fields found in the report either in ascending or descending order. If a sort order is not selected, the data will appear on the report in the order in which it is stored in the database.

If you set up a filter for a report, it will automatically be remembered the next time you open it.

Previewing a Report

Before anything is printed, Comart Dental V5 will always generate a print preview window to show you what the resulting output will look like.

Here is an example print preview window the report...



The buttons on the toolbar contain all the functions you need...

Print	Brings up the print dialogue so that you can choose which printer to print the report to.
First / Previous / Next / Last	Move to the first, previous, next or last page of the report.
Zoom In / Out	Zooming in to the report will show more detail, while zooming out gives you the bigger picture.
Export	Export the report to another format for viewing by another medium. The following formats are available: <ul style="list-style-type: none">• PDF – Adobe Acrobat Personal Document Format• XLS – Microsoft Excel Spreadsheet• DOC – Microsoft Word Document• RTF – Standard Rich Text Format
Close	Closes the preview window.

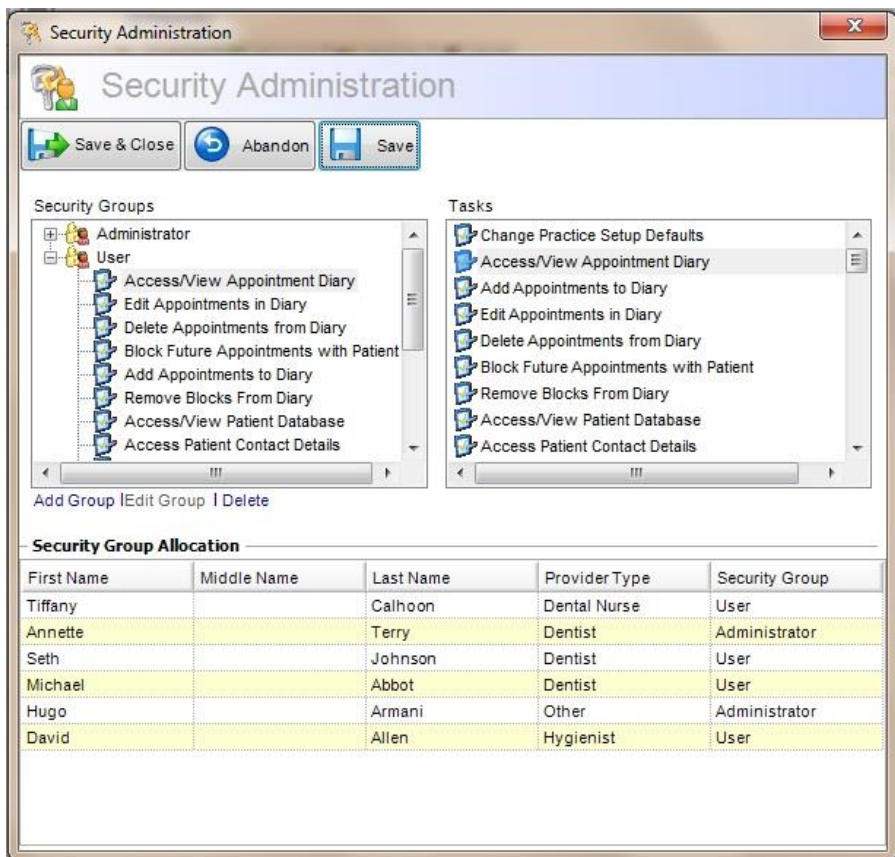
Requesting Additional Reports

You may during your use of the Comart Dental V5 software, that it would be useful to have certain reports that would be very useful to your practice. If this is the case, please inform Fusion Software of your requirements and we will be pleased to design the report on your behalf. All you then need to do is use the **"Add New Report"** functionality to register it on the system.

Security

Obviously it is important to keep the integrity of your practice data secure. Comart Dental V5 has been designed to make security as comprehensive as possible whilst still making sure it is simple to administer.

To access the security area, select **"Security"** from the Comart Dental V5 side panel.



Note that you will only be able to see this screen if you have access to do so.

Security Groups

Security Groups are displayed in the list in the top left of this window. A security group is a way of grouping certain tasks together. Whatever tasks are housed within a group are the ones that group will be able to perform.

Typical security groups are Administrator, User and Super-User, although you can create whatever groups you like. Use the Add, Edit and Delete group link labels to administer the groups which are essentially just names.

Security Tasks

Security Tasks are displayed in the top right list of this window. The Comart Dental V5 software is broken down into a number of different tasks e.g. Add a New Patient, Add a New Invoice and Void Invoice. Essentially, every task within the program has a security task allocated to it enabling you to assign these tasks to the groups.

Assigning Tasks to a Group

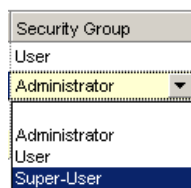
Once you have created the appropriate Security Groups you can start allocating security tasks to them. To do this you simply left-click on a Security Task and then, holding down the left mouse button, drag the task over the top of the relevant Security Group and let go. You will see the task appear underneath the group showing that this group can now perform that task.

You can drag and drop multiple tasks in one go by holding down the CTRL key and choosing the tasks from the list, or select a range of tasks by holding down the SHIFT key. Once multiple tasks have been selected simply drag them all into the group.

Allocating Users to a Group

At the bottom of this window you will see a list of all the users (staff members) set-up in the Comart Dental V5 program. The end column in this grid is named "Security Group". You will see all of the groups you have set-up appear in a drop down list in this box.

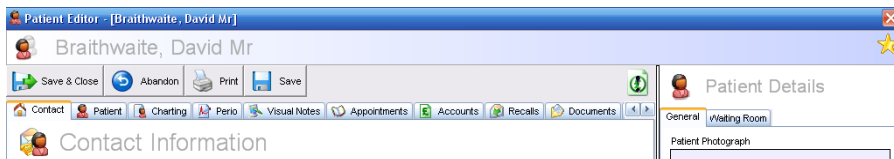
You now need to assign each user to a Security Group by selecting the right one from the list. The staff member will be able to perform any of the tasks that have been assigned to that Security Group.



Note that at least one group must be able to access the **"Change User Security Settings"** task, and at least one user must be given access to that group. In other words, at least one staff member must be able to get into the security area, otherwise you would not be able to add any other users to the software, or change the access that each user has to the program.

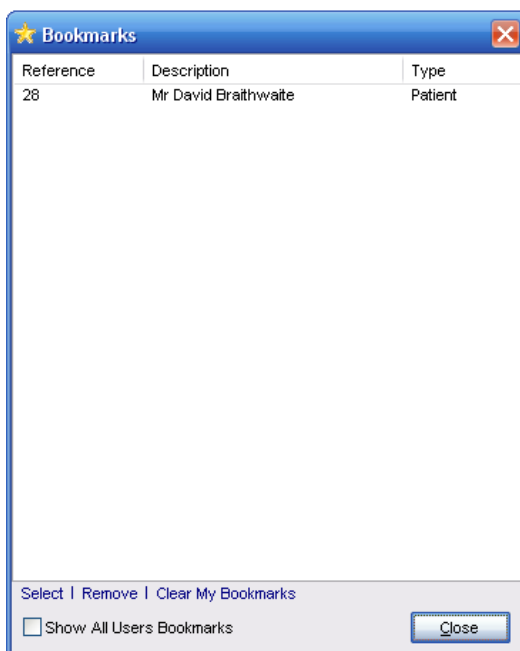
Working with Bookmarks

Bookmarks allow you to place markers on important records that you want to be able to open instantly from anywhere in the program. When you have a record open, for example a patient, a contact or an appointment, you will see a star shaped bookmark icon in the top right hand corner of your screen as shown in the picture below...



If you want to bookmark a record, simply click on the bookmark icon and you will see the words "Bookmark Added" appear next to it. Bookmarking a page will automatically save the record, therefore you cannot bookmark a page that is invalid (e.g. the first name and last name are not added to a patient record).

Once the record is closed you can immediately open it again using the bookmark window. At the top of the screen in the main menu you will see an entry called "Bookmarks". To open the bookmark window you can either select this menu item, or press the F10 function key on your keyboard. When you do this, the following dialogue will appear...



This dialogue displays all the bookmarks you have set in the program. You can select a bookmark by double-clicking on it or by highlighting it and selecting the "Select" link at the bottom of the window. The following options are available on the bookmark dialogue...

Select	Immediately jumps to and opens the record that is currently highlighted.
Remove	Removes the highlighted bookmark from your list.
Clear My Bookmarks	Removes all of your own bookmarks from the list.
Show All Users Bookmarks	This option allows you to see not only your bookmarks but everyone else's as well. This is very useful for when another member of staff needs you to look at a certain record or records. That member of staff can bookmark the relevant areas of the program and then ask you to go to each one.
Close	Hides the bookmark window.

The bookmark window can be resized to any shape you want and can also be moved anywhere on the screen that you want. The program will remember how you want to see the bookmark dialogue and will always restore the last known configuration, even if you log in on someone else's machine.

Comart Dental V5 Extensions

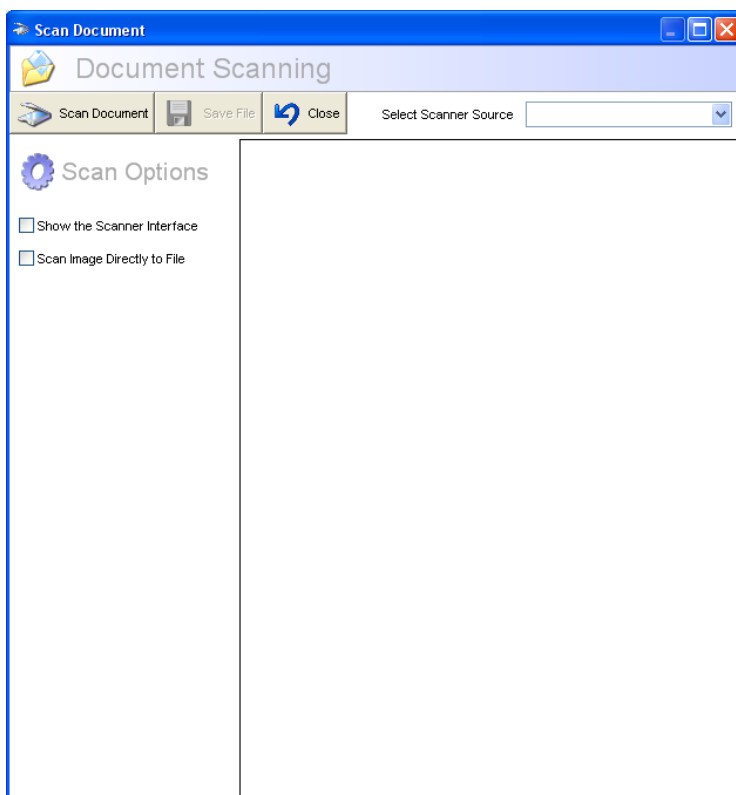
Along with the core functionality of the Comart Dental V5 program, it is possible to purchase additional modules known as extensions which extend the capabilities of the software. The following extensions are currently available...

NHS

Allows the practice to see and enter data that relates solely to NHS treatments. New fields will appear in the Practice Setup, the Treatments window, the Patient record and the main menu toolbar.

Document Scanning

This extension allows you to scan documents from any Twain compatible scanner and is accessed through the patients' document area (see "Patient Editor – Documents for more information). A link appears on this screen called "Scan Document". Selecting this option will display the following dialogue...



The following table describes briefly what each of these fields is for...

<i>Select Scanner Source</i>	The name of the scanner driver that is installed on your PC.
<i>Show the Scanner Interface</i>	Sometimes a scanner comes with its own configuration software that enables you to perform additional features when scanning. Ticking this box will display the scanners own software before performing the scan.
<i>Scan Image Directly to File</i>	When ticked the scanned image will be saved directly to a file, the name and location of which you may specify. When this option is not selected the image is only saved when you select the "Save File" button.

When an image is scanned by pressing the "Scan Document" button, it will appear on the screen for you to view. You can save the scanned document at any time by selecting the "Save File" button. This document will then be stored against the current patient record.

Postcode Recognition

Postcode recognition enables you to find a persons full address based on simply entering the patients postcode. Once this extension is activated, go into the practice setup and select the "Postcode" tab. Press the "Sign Up" button and enter your details on the PostcodeAnywhere web site. This is the site that Comart Dental V5 uses to perform lookups. This is a chargeable service as Royal Mail require everyone who uses this facility to pay a yearly license for doing so, however this license can be for as little as £50 per year.

SMS Text Messaging

This extension enables you to send text messages directly to a patient's mobile phone. Typically this is used for reminding a patient that they have an appointment at your dental surgery. To achieve this Fusion Software (UK) Ltd use a provider called TextAnywhere who can be located at www.textanywhere.co.uk.

To sign up for this service go to "File/Practice Setup" from the main menu, then click on the "SMS Texting" tab. Ensure the TextAnywhere option is selected and then click on the "Sign Up" button. Enter your details into this area and purchase blocks of credits so that they can then send text messages. These credits can be purchased much cheaper when bought in larger blocks, therefore it would be useful for you to calculate the number of texts you are likely to send over a six month period and buy accordingly. The SMS Text Message setup can be found under Practice Setup in the main menu (see "Practice Setup – SMS Texting" for more information).

To send a text message either click on "Communications" on the main menu at the top of the screen and then "Send Text Message" or select "Create Appointment Reminders" from the Documents Page. In this section we will discuss sending a text message through the "Communications" route. When selected you will see the following dialogue...

Send	Date	Code	Name	Mobile	Treatment	Category	Status
<input checked="" type="checkbox"/>	13/04/2005	36	Mr Harry Noble	07961 546374	Crown Prep	Private	Pending
<input checked="" type="checkbox"/>	14/04/2005	40	Mr Paul Westhead	07946 278763	Bridge Prep	NHS	Pending
<input checked="" type="checkbox"/>	13/04/2005	38	Dr Edward Hibbert	07465 463546	Conservation	Private	Pending
<input checked="" type="checkbox"/>	14/04/2005	41	Mr Lee Ottaway	07961 622543	Conservation	Private	Pending

Select All | Select None

SMS Message Information

Get Balance

Status

Patient Name Mobile Status

This dialogue is split into two tabs. The first tab is for sending appointment reminders. The following table describes briefly what each of the fields on this tab is for...

<i>Start Date</i>	The start date of the appointment range that will be used in selecting which patients' appointments should be included in the text messaging service.
<i>End Date</i>	The end date of the appointment range. Appointments between the Start Date and the End Date will be displayed in the grid just below.
<i>Provider</i>	You can choose to send messages to all patients within the date range or just to a specific provider's patients.
<i>Grid</i>	Displays a summary of the patients who have appointments within the selected criteria. The "Send" checkbox is editable. Only patients who have this box ticked will be sent a message.
<i>Select All/None</i>	Quickly selects all or none of the entries in the grid for sending a message.
<i>Get Balance</i>	Retrieves the number of credits that are currently allocated to your account from IntelliSoftware. 1 credit = 1 message.
<i>Status</i>	Displays the status of each message once they have been sent.

When a message is sent it will use the format specified in the Practice Setup – Communications section. Please ensure this is set first before sending your messages.

The second tab called "Other Messages" enables you to send any message you like to a chosen mobile. Simply key in the relevant details and select "Send Message". Again the status box will indicate whether the message was successfully sent or not.

Patient Education

The patient education extension provides a link to Medivision's CiC Pro educational software. These contain detailed animations of many different procedures making it easy to convey to the patient exactly what you will be doing with them.

Once you have linked your treatments to the animations in the treatments area (see "Treatment Editor – Documents for more information)



Tip: Extensions can be unlocked using the "Unlock Manager" under "Tools" on the main menu. Locks can only be removed by keying in a valid registration code which may be purchased from Fusion Software (UK) Ltd.

Managing Your Practice Setup

Every practice will have its own way of working, so it's important that you are able to configure Comart Dental V5 to work in the way you want it to. You can set all sorts of standard defaults in the "Practice Setup" screen.

To access this area, select "File" from the main menu, and then "Practice Setup".

Practice Details

From this page you can enter the name and details of your practice. This information will be used by default on all of your documentation.

Practice Setup

SMS DocMail NHS Postcode Miscellaneous

Practice Details Working Hours Documents Directory Stores Financial Interfaces E-Mail CardSave

Practice Setup

Sites

My Practice

Add Site
Edit Site
Delete Site

Practice Name
Bridge-IT Dental Practice

Telephone
0800 612 4675

Practice Address
100 Main Road
Bourne
Lincolnshire
AB12 3CD

Fax

E Mail
(Insert Email Address Here)

Owner
(Insert Name Here)

OK Cancel

Working Hours

These are the default working hours for the practice. These are the default hours that will be assigned to a new member of staff when you add them to the system.

Practice Setup

Practice Setup

SMS DocMail NHS Postcode Miscellaneous

Practice Details Working Hours Documents Directory Stores Financial Interfaces E-Mail CardSave

Default Staff Working Hours

<input checked="" type="checkbox"/> Monday	Start Time 09 : 00	Finish Time 17 : 00	Lunch Start 13 : 00	Lunch Finish 14 : 00
<input checked="" type="checkbox"/> Tuesday	08 : 00	17 : 30	13 : 00	14 : 00
<input checked="" type="checkbox"/> Wednesday	08 : 00	17 : 00	13 : 00	14 : 00
<input checked="" type="checkbox"/> Thursday	09 : 00	17 : 30	13 : 00	14 : 00
<input checked="" type="checkbox"/> Friday	09 : 00	17 : 30	13 : 00	14 : 00
<input type="checkbox"/> Saturday	09 : 00	17 : 00	13 : 00	14 : 00
<input type="checkbox"/> Sunday	09 : 00	17 : 00	13 : 00	14 : 00

OK Cancel

Documents

Contains various fields that are used as defaults for your documentation throughout the program. These include the following...

Practice Setup

Practice Setup

SMS DocMail NHS Postcode Miscellaneous

Practice Details Working Hours Documents Directory Stores Financial Interfaces E-Mail CardSave

Document Options

☒ Use Internal Word Processor ☒ Autosave Quick Documents to Patient Record ☐ Protect Saved Quick Documents

☒ Autosave Documents on Printing

Document Printer Size

App Confirmation Appointment Card Multiple Payment Receipt A4 Offset 0 cm

Declarations

Estimate/Plan Declaration I confirm that I accept the proposed treatment services as detailed in this plan.

Option Declaration I can confirm that I have received the following options for my treatment plan.

Invoice Clause TERMS AND CONDITIONS

1. GENERAL

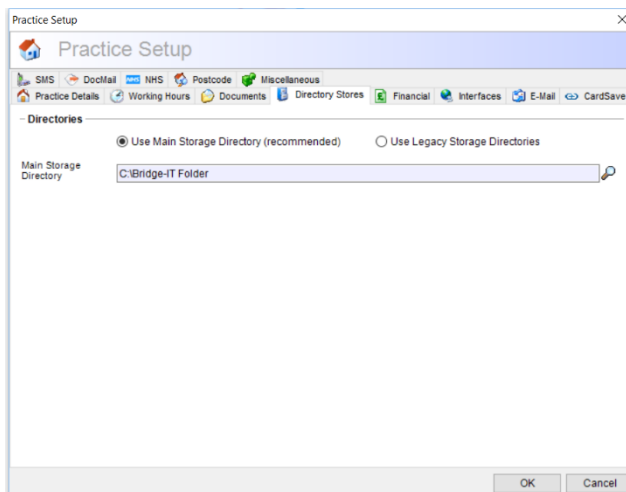
(a) Estimates given to Patients will remain valid for a period of three months from the date of the

OK Cancel

Use Internal Word Processor	Causes Comart Dental V5 to use its own built in word processor rather than the interface to Microsoft Word.
Automatically Save Quick Documents to the Patient Record	This ensures that when a quick document is created from the patient record, the document is automatically named and saved to the default save directory set up for that document (see "Comart Dental V5 Documents – Document management" for more information). The document will also automatically appear under the patients "Document" tab in the patient record.
Estimate/Plan Declaration	You can add a standard plan/estimate clause in this area. This clause will always appear at the bottom of your plans and estimates.
Invoice Clause	As above but applies to the invoice.

Directory Stores

There are two methods of storing your data files, the new method which stores all files in a patient code sub directory off of a single main directory. This is by far the best and easiest method to implement. Or there is the old legacy method of storage which is being maintained to support older customers.



Use Main Storage Directory

Main Storage Directory	This is the main directory where you want the program to automatically store any documents/images/scans etc. for every patient. Any files are then stored in the patient sub directory within this main directory.
------------------------	--

Legacy Storage System (not recommended for new installs)

Scanned Files Directory	This is the directory where you want the program to automatically store any "instant scan" document. When set up this means you can open the patient record and go to the "Documents" tab and select "Instant Scan" instead of "Manual Scan". The document placed in the scanner will then instantly be saved into the patients' record and saved in the directory specified here.
Miscellaneous Store	The directory where any saves that are not specified elsewhere will be stored. This should be viewed as a default save directory.
Store Documents in Patient Code Sub-Directories	Creates a sub-folder within the main directory based on the patient code, so all documents and scans etc. are separated into patient specific directories

Financial

Allows you to set the default credit limits for new patients and contacts. This value will be used whenever you create a new patient or contact on the system.

Allows you to set the default VAT rate that will be used on your invoices. You can change the VAT rate when you actually raise the invoice, however whatever rate you put in here will be used as the standard rate.

Practice Setup

Practice Setup

SMSDocMailNHSPostcodeMiscellaneousPractice DetailsWorking HoursDocumentsDirectory StoresFinancialInterfacesE-MailCardSave

Currency Symbol£Default Credit Limit £0.00VAT Rate %0

☐ Make Payment Reference a Mandatory Field

OKCancel

Interfaces

Comart Dental V5 has the capability to link to popular digital radiography systems such as Schick and Trophy. If you have one of these systems you can define your setup using this tab.

The screenshot shows the 'Practice Setup' dialog box with the 'Interfaces' tab selected. The 'Digital Radiographic Imaging' section has 'Digora Soredex' selected in the dropdown, with radio buttons for 'First System' (selected), 'Second System', and 'Third System'. The 'Name Format' is set to 'First Name' Last Name'. The 'Perio Charting' section has 'My perio charting system is' set to '<None>'. The 'Patient Education' section has 'Software Directory' set to 'E:\MEDI_VIS' and an 'Update Animations' button. At the bottom are 'OK' and 'Cancel' buttons.

Select the appropriate digital radiographic system from the list of options at the top. If you do not use one of these systems set the options to "None". Selecting Schick will give you the following options...

Program File	This is the location of a file called CDRStart.exe which is packaged with the Comart Dental V5 program. It is usually located in the Interfaces sub-directory within the Comart Dental V5 main directory. e.g. the usual location is C:\Program Files\Comart Dental V5\Interfaces\CDRStart.exe.
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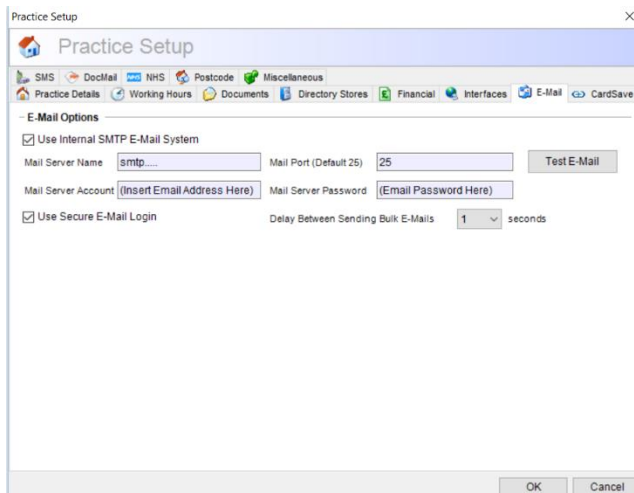
If you select Trophy or Gendex VixWin Pro as your digital radiography system you will see the following options...

Program File	This is the location of the EXE program file.
Storage Directory	This is the directory where you would like to store the images from this system. Patient images are stored within sub-directories within this main directory that are named according to the unique patient code.

Note that you can set up two radiographic systems and link to either at the time you open the patient record.

Email Communication

Comart Dental V5 has the capability to send emails directly to your patients or other contacts. It achieves this by using its own Internal SMTP Email System. Once you have inputted your outgoing SMTP server details into Practice Setup, Comart Dental V5 can then access your external email account, and send emails directly. This gives the appearance that Comart Dental V5 is, in fact, sending the emails.



The screenshot shows the 'Practice Setup' dialog box with the 'E-Mail Options' tab selected. The dialog has a title bar 'Practice Setup' and a close button 'X'. Below the title bar is a toolbar with icons for SMS, DocMail, NHS, Postcode, Miscellaneous, Practice Details, Working Hours, Documents, Directory Stores, Financial, Interfaces, E-Mail, and CardSave. The 'E-Mail Options' section contains the following fields and controls:

- ☒ Use Internal SMTP E-Mail System
- Mail Server Name:
- Mail Port (Default 25):
- Test E-Mail:
- Mail Server Account:
- Mail Server Password:
- ☒ Use Secure E-Mail Login
- Delay Between Sending Bulk E-Mails: seconds

At the bottom right are 'OK' and 'Cancel' buttons.

SMS Messaging

Comart Dental V5 has the capability to send SMS text messages to a person's mobile phone. It achieves this by accessing a site on the internet therefore any PC sending a text message must have internet access. Users of this service must sign up with this internet site (www.textanywhere.co.uk) and purchase credits. Credits can be purchased in bulk thereby considerably reducing the cost of each message. Typically the messaging service is used to send reminders about appointments to a person's phone.

Practice Setup

Practice Setup

Practice Details Working Hours Documents Directory Stores Financial Interfaces E-Mail CardSave
SMS DocMail NHS Postcode Miscellaneous

- SMS Text Messaging Setup

SMS User Name SMS Password Sign Up
International Dialling Code Check Account
No Reply Option

- Proxy Settings

Proxy Address
Proxy User Name Proxy Password

- SMS Charging

☐ Charge Patient for SMS Service Charge Amount £

OK Cancel

The following fields are required for SMS Text Messaging Setup...

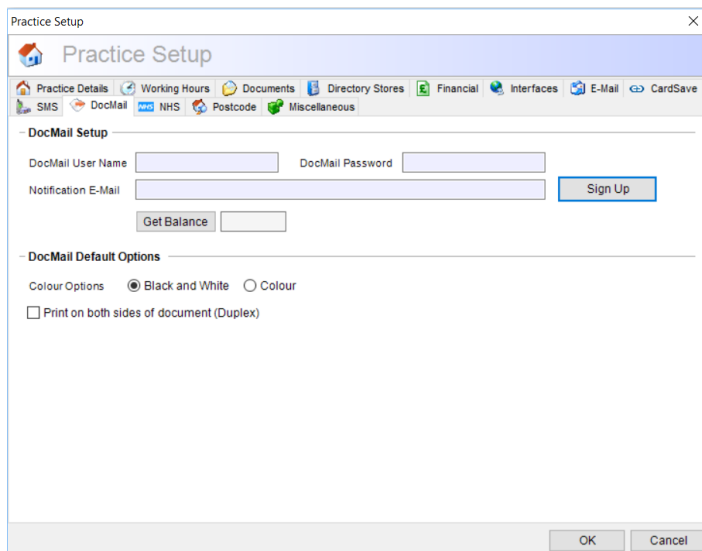
SMS User Name	The user name that you have created for yourself on the IntelliSoftware internet site.
SMS Password	The password that you have created for yourself on the IntelliSoftware internet site.
International Dialling Code	In order for the software to be able to send texts through this external source, an international dialling code must be present.
Reply Option	The default setting for SMS messages is that 'No reply' is available. You can change this setting to enable your patients to reply to your practice phone number, or a practice email address.

If you use a proxy server to attach to the internet you will also need to provide the following details...

Proxy Address	The proxy server address configured by your administrator.
Proxy User Name	The user name assigned to your proxy by your administrator.
Proxy Password	The password assigned to your proxy by your administrator.
SMS Charging	Comart Dental V5 allows you to charge your patients for the SMS service. You can input whether you'd like to charge, and then how much.

DocMail

Comart Dental V5 has the capability to link with your "DocMail" account. If you do not have a DocMail account, you can sign up using the relevant button shown on the image below. DocMail allows you to send correspondence to your patients, without having to physically pay for postage and send it. In order for this facility to work, you will need to keep your balance up to date with DocMail.



The screenshot shows a 'Practice Setup' window with a tabbed interface. The 'DocMail' tab is selected. The 'DocMail Setup' section contains the following fields and buttons:

- DocMail User Name:** A text input field.
- DocMail Password:** A text input field.
- Notification E-Mail:** A text input field.
- Sign Up:** A blue button to create a new account.
- Get Balance:** A button next to a small text input field for checking the account balance.

The 'DocMail Default Options' section includes:

- Colour Options:** Two radio buttons, 'Black and White' (which is selected) and 'Colour'.
- Print on both sides of document (Duplex):** An unchecked checkbox.

At the bottom right of the window are 'OK' and 'Cancel' buttons.

NHS

To communicate information to the DPB web service you must sign up to become a user of their system. Once the DPB have approved your membership, they will send you various details that must be included within any internet transmission that will allow you to connect to their server. This information is held under the NHS tab in the practice setup screen. Please note that this tab will only appear if you have the NHS module activated on your system.

Practice Setup

Practice Details

Working Hours

Documents

Directory Stores

Financial

Interfaces

E-Mail

CardSave

SMS

DocMail

NHS

Postcode

Miscellaneous

NHS Dental Services

Claims URL

Response URL

☐ Automatically Use NHS Plan When Patient Has NHS Treatments

☐ Automatically Charge Patient After Creating FP17 Claim Form

NHS Authorization Details

Site Number

Contract Number

Location Number

Claim Ref.

NHS Region

☐ Allow Orthodontic Claims

User Name

Password

NHS Band Prices for Previous Year

Band 1 £

Band 2 £

Band 3 £

Urgent £

Repairs £

NHS Band Prices for Current Year - Use values below for the year commencing

Band 1 £

Band 2 £

Band 3 £

Urgent £

Repairs £

[Transfer Current Prices to Previous Year](#)

OK

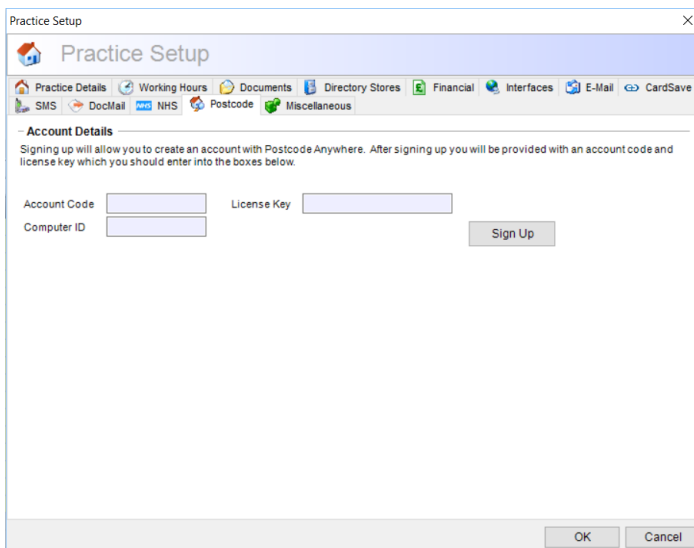
Cancel

The following fields are shown on the NHS tab...

Claims URL	The URL web address of the DPB server where claims are sent over the internet. The default setting is "https://ebusiness.dpb.nhs.uk/claims.asp"
Responses URL	The URL web address of the DPB server where responses are received from the DPB over the internet. The default setting is... "https://ebusiness.dpb.nhs.uk/claimsresponses.asp"
Site Number	A unique, normally four digit reference, that identifies your practice site. Provided by the DPB.
Contract Number	The contract number of the NHS contract that the practice owner has made with the DPB.
Location Number	Unique, normally five digit, reference that identifies the location of the practice. Provided by the DPB.
Last Claim Reference	Allows you to specify the number from which you want your claim references to start. These are six digit numbers that are unique to every claim and are assigned by the program.
NHS Region	Some NHS requirements are specific to the region you live in, therefore choose the region to gain access to these areas.
Allow Orthodontic Claims	If your practice handles orthodontic treatments on occasion, tick this box. It will allow you to choose whether you want to create a standard FP17 or an orthodontic FP17O claim form for a course of treatment.
User name	A unique reference provided by the DPB when the practice signs up to use the web claims facility.
Password	Unique password provided by the DPB that allows the user mentioned above to log in to the server.
Band Prices	These five boxes allow the user to change the price of each band as the DPB assigns new values to them.

Postcode

If you have the postcode extension activated you will see this tab displayed. Postcode recognition requires internet access and allows you to perform lookups on a patients address postcode.



The screenshot shows a window titled "Practice Setup" with a close button (X) in the top right corner. The window has a blue header bar with the title "Practice Setup" and a home icon. Below the header is a tabbed interface with the following tabs: Practice Details, Working Hours, Documents, Directory Stores, Financial, Interfaces, E-Mail, CardSave, SMS, DocMail, NHS, Postcode, and Miscellaneous. The "Postcode" tab is currently selected. Below the tabs, there is a section titled "Account Details" with a small icon of a person. The text below the title reads: "Signing up will allow you to create an account with Postcode Anywhere. After signing up you will be provided with an account code and license key which you should enter into the boxes below." There are three input fields: "Account Code" (a single-line text box), "License Key" (a single-line text box), and "Computer ID" (a single-line text box). To the right of the "Computer ID" field is a "Sign Up" button. At the bottom right of the window are "OK" and "Cancel" buttons.

To use the postcode lookup facility you must sign up using the "Sign Up" button. Enter your details on the web site displayed and choose a suitable package for your practice (Royal Mail require you to license your site on an annual basis for postcode recognition. However packages can be purchased for as little as £50 per annum). Once you have signed up you will be given an account code and a license key. Enter these into the boxes shown on the Postcode tab in Comart Dental V5 and then move your cursor into the "Computer ID" field. You will find that Comart Dental V5 will automatically generate this key for you so you have no need to enter this field manually. When everything is entered, you can open a patient record, key a postcode into their address and press the postcode lookup button.

Miscellaneous

Contains various fields that are used as defaults throughout the program. These include the following...

The screenshot shows the 'Practice Setup' dialog box with the 'Miscellaneous' tab selected. The dialog has a title bar with a house icon and the text 'Practice Setup'. Below the title bar is a menu bar with icons and labels for 'Practice Details', 'Working Hours', 'Documents', 'Directory Stores', 'Financial', 'Interfaces', 'E-Mail', 'CardSave', 'SMS', 'DocMail', 'NHS', 'Postcode', and 'Miscellaneous'. The main area is divided into sections: 'Appointment Related' with checkboxes for 'Automatically Delete Cancelled Appointments' (checked), 'Display Notification Tags in Diary' (checked), and 'Update Diary On Save' (unchecked); 'Treatment Related' with a checkbox for 'Use the FDI Two Digit Tooth Numbering System' (unchecked); 'Program Related' with a checkbox for 'Display Backup Warning on Exiting Program' (unchecked) and a 'Specify Mandatory Program Fields' button; 'Patient Related' with checkboxes for 'Automatically Assign Code to New Patient' (checked), 'Use Patient Group Colour Coding' (checked), 'Display Warning if Patient Has No Medical History' (unchecked), 'Lock Patient Record On Opening' (unchecked), 'Display Anonymous Arrival Tags' (checked), 'Activate Denplan Oral Health Scoring' (checked), and 'Autosave Patient Record Every 5 Minutes' (checked); and 'Client Interface' with a 'Desktop Type' dropdown menu set to 'Standard Monitor'. At the bottom right are 'OK' and 'Cancel' buttons.

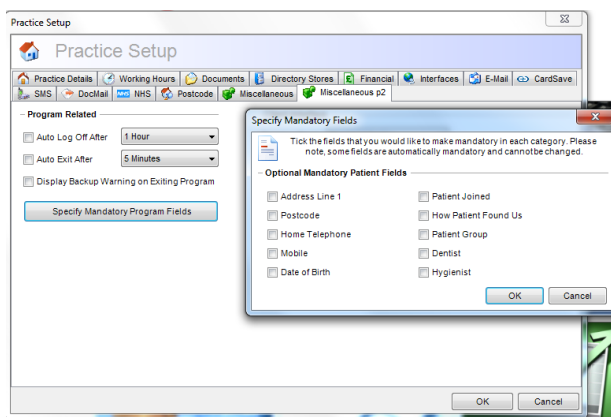
Automatically Delete Cancelled Appointments	When ticked, whenever you set an appointment to a cancelled status, the diary will automatically delete it (although a record of the cancelled appointment will still appear in the patients' appointment history).
Display Notification Tags in Diary	Green tags appear on the left of the screen at reception informing the user of exactly what needs to be done with a patient. However unticking this box prevents the tags from showing.
Confirmation Card Size	Specifies the size of the appointment confirmation card your practice uses. This ranges from an A4 sheet through to a small card.
Confirmation Card Offset	Specifies the left hand margin (in cm) of the appointment confirmation card being used. This is especially useful for smaller cards as the left hand page margin can often change according to the printer being used. When the card size is set to A4 this offset should be 0.

Automatically Assign Code to New Patient	When ticked, whenever you create a new patient, a unique code will automatically be assigned to the them. If you would rather assign your own codes, ensure this box is unticked.
Use Patient Group Colour Coding	Patient groups can be assigned a colour, and when this box is ticked, the header of the patient record will display in that colour, making it quick and easy to see which group the patient belongs to.
Display Warning if Patient Has No Medical History	Where you are using Comart Dental V5 to create medical histories, if you want a flashing warning to appear if no medical history has been taken then tick this box. A flashing icon will appear in the patient record near where the other alerts appear.
Lock Patient Record On Opening	For larger practices it can sometimes be best to lock the patient record so that the program knows anyone else opening the record is unable to edit the details. If the record is open, any other users will still be able to look at the record but will not be able to change it.
Activate Denplan Oral Health Scoring	For those dentists who want to record a patients Oral Health Score, tick this box. This turns the regular BPE chart in the patients' record into a full OHS recording module which includes the BPE.
Autosave Patient Record every 5 Minutes	Enabling the autosave feature will automatically save any changes made to the patient record every 5 minutes. This is especially useful for practices that generally have longer appointments, therefore spend more time on each patient record and ensures that in the case of a network or computer failure, any data that has taken a lengthy time to be entered won't be lost.
Current Patient Code Value	This allows you to specify the number from which you wish the program to assign codes to your patients. For example, if you import many patients into the program from another system they will already have been assigned codes. You therefore would not want to assign a code of 00001 to the next patient you add, rather you need it to assign a value much higher. This field allows you to set that figure.
Highlight Patient After Waiting # Minutes	This is the amount of time it is acceptable for a patient to be waiting in the waiting room before it becomes urgent. This value is the number of minutes that a patient can be in the virtual waiting room before they are highlighted by the program as having waited too long.
Default	This is the amount of time that will be used as the default

Dental/Hygienist Recall Period	recall interval between seeing patients. Of course this can be overridden on a patient by patient basis.
Minimum Stock Trigger	The level of stock for quantity based items that your stock may drop to before you are warned that you are running low and need to re-stock. This warning is given when you are actually adding treatments to a patient dental chart.
Use the FDI Two Digit Numbering System	Some dentists like to use the FDI two digit tooth numbering system. When ticked, all of the dialogues and tooth charting mechanisms will use the two digit standard instead of the default UR, LL terminology.
Display Backup Warning on Exiting Program	If you are using Comart Dental V5 to take backups, ticking this box will display a warning on exiting the program if a successful backup has not been taken over the previous 7 days.
Monitor type	Allows you to switch the program between standard monitor and touch screen mode. When in touch screen mode, the button and other areas of the program are bigger making them easier to select with a pen or your finger.

Specify Mandatory Program Fields

Optional mandatory fields can be specified in the patient record. Once enabled, this will force staff members to complete certain fields in the patient record before being able to exit. To complete this process, click on the “Specify Mandatory Program Fields” button, and tick the appropriate fields that you would like to be mandatory.



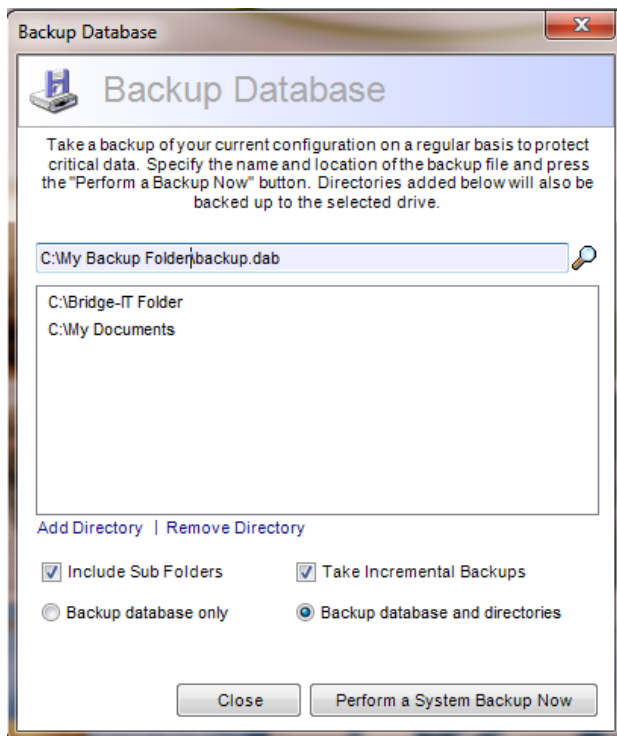


Please Note: Once set, all users will need to exit the program and log back in again before they become mandatory on all machines.

Backing Up a Practice Database

It is essential that you take regular backups to minimize the consequences of data loss. Data corruption or complete loss can arise from technical malfunctions in the network or the server where the data is residing.

To make a backup of the data, from the "Tools" menu at the top of the screen, highlight "Database Administration", and then "Backup Database". This will display the backup window shown below...



Use the "Browse" button with magnifying glass picture to browse to a drive and directory where you want to backup your current database. If you wish you can also backup important directories to the allocated drive at the same time. To do this, simply press the "Add Directory" link and specify the location of the directory you want to backup. The selections that you make will be stored, so there is only a need to enter the directories once.

If you want to backup the database only, highlight the "Backup Database Only" option, otherwise ensure that "Backup database and directories" is selected. (Please note, you cannot perform a backup of directories to the same drive that those directories are held on).

There are two additional options to select before you take your backup. Firstly you might want to include not just the files in the immediate directories you have

selected but also backup all the directories inside those as well. To back up everything in those directories make sure this option is ticked.

Rather than overwriting your backup every day you can tick the "Take Incremental Backups" option. This will date stamp the backup so every time you back up the system it will give the backup a new name. You should only do this if the backup medium you are storing your archived data on is big enough. The reason for taking incremental backups is that you might want to go back several days or weeks rather than restoring the very latest database, just in case a problem occurred in the data some time ago.

Once everything is set correctly, press the "Perform a System Backup Now" button. The data will be compressed and stored to the backup medium.

If the backup was successful you will be notified with a message on the screen. Ensure that this message appears, otherwise you may not have backed up anything!



Tip: Remember that you should really copy your backup files to a removable device, such as a USB Flash Drive, CD, zip disk or tape drive. Simply backing up to the same hard disk will not help if your computer is stolen or if the hard disk is irreparably damaged!

Fusion Software (UK) Ltd also offers an off-site back up facility that will automatically take a back up of your data whilst you work and store the data on our off-site server. This ensures that even if you have a fire and the PC's are all destroyed you always have a safe back up off site.

Restoring a Database from a Backup

From the "Tools" menu at the top of the screen you can choose to restore a Practice Database from a backup file. Select "Database Administration", "Restore Database".

Clicking this option will open the restore window as shown below...



Simply locate the file you want to restore and then press the "Restore Database" button. The current database will then be overwritten by the backup file. Data that has been gathered SINCE the last backup will be gone so make sure you are absolutely certain you want to do this.

Once a backup has been restored, the program will automatically close down and you will need to log back in again. This is to ensure that the data is transferred correctly.

Importing Data from Third Party Systems

Comart Dental V5 houses a comprehensive importing facility that allows it to pull in external data from any comma separated file (known as a .CSV file). These files are typically used by many systems for allowing the transfer of data.

To import data from a comma separated file, select “Tools” from the main menu, highlight “Database Administration” and select “Import External Data”. This will display the following dialogue...

Import External Data

Save & Close Abandon Import Data

This function allows patient related data to be imported from an external package, i.e. an accounts system or previous dental package. Select the file, then match the Bridge-IT fields to the fields in the file. Once this is complete, select 'Import Data' at the bottom of the screen.

External Data File

Preview of External Data

Field 1	Field 2	Field 3	Field 4	Field 5	Field 6
Mrs	Barnes	Farida	3 St. Lukes Close		
Mr	Barnes	Ian	39 Strawberry Hill		
Mr	Barnes	Sean	41 Kelburn Close		Eas
Mrs	Barnwell	Joyce	65 Greenwood Road		
Mst	Barrick	Carl	19 The Green		Flor

Bridge-IT Fields

- Patient Code
- Title
- Field 1
- First Name
- Field 3
- Middle Name
- Last Name
- Field 2
- Address Line 1
- Field 4
- Address Line 2

External File Fields

- Field 1
- Field 2
- Field 3
- Field 4
- Field 5
- Field 6
- Field 7
- Field 8
- Field 9
- Field 10

Data Import Options

The date format used in the file is ☒ Day/Month/Year ☐ Month/Day/Year ☐ Year/Month/Day

The following table describes briefly each of these areas...

<i>External Data File</i>	The name and location of the external file that you want to import into Comart Dental V5.
Preview of External Data	This area will display the first five rows in your data file and divides each field into column names. You can then clearly see which data is in which field. (e.g. in the screenshot above Field 1 represents the patient Title, Field 2 their second name etc.).
Comart Dental V5 Fields	The available fields within the Comart Dental V5 program for which it is possible to import data. These fields basically represent the full contact details of each patient.
External File Fields	A list of fields that have been detected within the external data file. You can see what each field represents by checking the preview window above.
Data Import Options	Allows you to specify the format of any dates used within the program. Third party systems will often output dates in formats other than the standard British format which is dd/mm/yy.

Once you have selected the external data file you want to import by browsing to it using the magnifying glass browse button, you will see the detected fields appear in the preview window. Also these same fields will be listed in the “External File Fields” list box.

You inform Comart Dental V5 what each of the fields is by dragging a field from the “External File Fields” box over the relevant folder in the Comart Dental V5 fields box. Once you have dropped the field into the folder you will see it appear underneath in a tree view. Please note that only one external file field may be linked to each field within the Comart Dental V5 program. If you make a mistake, you can easily delete it by highlighting the wrong entry and selecting “Delete Field”.

Finally, ensure that the correct date format is selected using the import options. Comart Dental V5 will then know how to convert any dates it finds into an appropriate format for the program.

If for any reason you need to exit from this dialogue, saving and closing the screen will save the changes you have made so far. You therefore only have to set-up the import structure once in order to be able to use it on future occasions should the need arise.

Once the details have been set correctly, select “Import Data”. A progress dialogue will appear and tell you exactly what has been done with each line of the record, and whether any errors occurred.

NHS Claims

Sending Claims Data to the DPB Via the Internet

To transmit your claims data to the DPB and to receive updated messages and schedules from them, click on “NHS” from the main menu at the top of the screen and then select “Claims”. This will display the following window...

NHS Claims Matching Criteria - 12

Send & Receive Print Export Close Date range based on claim Completion Date Options

Claims Rejections Broadcasts UDA/UDAA Analysis Claim Analysis Results

Start Date 09 / 03 / 2016 End Date 09 / 03 / 2017 Provider <All Staff> Status <All Complete Claims>

Claim No.	Code	First Name	Last Name	Provider	UDA	UOA	Dentists Fee	Patient Charge	DPB Charge	DPB Conf.	DPB Rem.
068471	00006	James	Smith	Dr Michael Smith	1	0	£21.00	£0.00	£21.00	£0.00	£0.00
068472	00007	Anne Delys	Casserty	Dr Michael Smith	1	0	£21.00	£17.50	£3.50	£0.00	£0.00
068473	00008	Maria	Muscroft	Dr Michael Smith	1	0	£21.00	£0.00	£21.00	£0.00	£0.00
068474	00010	Bruno	Ashby	Dr Michael Smith	1	0	£21.00	£0.00	£21.00	£0.00	£0.00
068476	00012	Nathalie	Griffiths	Dr Michael Smith	1	0	£21.00	£17.50	£3.50	£0.00	£0.00
068477	00013	Claire	Aldershot	Dr Michael Smith	1	0	£21.00	£0.00	£21.00	£0.00	£0.00
068480	00015	Peter	Williams	Dr Michael Smith	1	0	£21.00	£0.00	£21.00	£0.00	£0.00
068481	00016	Angela	Abel	Dr Michael Smith	12	0	£252.00	£209.00	£43.00	£0.00	£0.00
068483	00799	James	Jackson	Dr Michael Smith	1	0	£21.00	£17.50	£3.50	£0.00	£0.00
068484	00001	Mark	Cross	Dr Michael Smith	1	0	£21.00	£17.50	£3.50	£0.00	£0.00
000057	00001	Mark	Cross	Dr Michael Smith	3	0	£63.00	£55.90	£7.10	£0.00	£0.00
000058	00011	Richard	Barry	Dr Michael Smith	1	0	£21.00	£0.00	£21.00	£0.00	£0.00

Select All | Select None | Open Claim | Open Patient

Totals 25 0 £525.00 £334.90 £190.10 £0.00 £0.00

The following table briefly describes each field on the Claims tab...

Start Date	The start date that will be used in selecting which claims should be displayed in the grid.
End Date	The end date that will be used in selecting which claims should be displayed in the grid.
Provider	You can choose to view all claims within the specified date range or limit the list to a specific provider.
Grid	Displays the claims that match the criteria along with the fees associated with each claim. The “Send” checkbox is editable. Only claims that have this box ticked will be sent to the DPB.
Status	Displays only the claims with the selected status. i.e. you can choose to view all claims, only those that have not yet been sent, those that have been rejected etc.

<i>Select All/None</i>	Quickly selects all or none of the entries in the grid.
<i>Options</i>	Displays connection options that may affect the way the program connects to the internet.

You can limit the number of claims that you see in the grid using the filtering criteria. Most of the criteria are fairly obvious but the status of each claim is updated according to what has been done with it, either by yourself or by the DPB.

Below is a list of what each status means...

<i>Awaiting Submission</i>	Simply indicates that although the claim has been created within the program, it has not yet been transmitted to the DPB for approval. At this stage you should tick the "Send" box and press the "Send/Receive" button. At this stage you will be able to see that patient charges and any charges that will be passed on the DPB, however any confirmed payments will be at zero since they need to be examined first by the Dental Practice Board.
<i>Submitted <Awaiting Response></i>	The claim has been submitted to the DPB for approval, and has passed the initial file format test, however it has yet to be approved. Once a claim has been submitted it will become uneditable unless it is rejected.
<i>Accepted</i>	A schedule has been received by the DPB to state that the claim has been analysed and accepted by them. Any appropriate charges should appear in the columns. Once a claim has been accepted it cannot be edited.
<i>Rejected</i>	The claim has been analysed by the DPB and rejected. The reason for the rejection can be seen under the "Rejections" tab where any messages will appear. When a claim is rejected you will be able to edit the claim to make any necessary changes before sending it again.

To submit any selected claims, press the "Send and Receive" button. This will connect to internet and transmission of data will take place. You can see exactly what occurred in the transmission by viewing the "Results" tab which you will be automatically taken to once the send and receive process is complete.

You will also notice that all 'rejected' and 'deleted' claims are clearly colour-coded to show the user instantly what the status of the claims are within the date-range specified.



Tip: You can open a claim to view its details by double-clicking it in the grid, or by pressing the "View Claim" button. The claim is not editable unless it is opened from the actual patient record.

Handling Claim Rejections

If a claim has been rejected by the DPB it will appear under the “Rejections” tab. You are able to filter these rejections in the same way as the claims. Any rejection messages will be grouped under the claim number so that you can see the issues surrounding the claim. If a claim has been rejected it may be possible to resolve the issue and resend the information. You can do this in the normal way, by going to the patient record, opening the claim and making whatever adjustments are necessary. The status will be changed from “Rejected” back to “Awaiting Submission” and you will be able to send it again.

Handling Claim Corrections

Sometimes you will realize that a claim that has been sent to the DPB is incorrect. You can send a corrected claim by following this procedure. Please note this only applies to claims when they have already been sent to the DPB using EDI.

Once the claim has been sent and is awaiting a response from the DPB, select the patient record and open the claim that is incorrect. In the top right hand corner of the claim form you will see a tick box that wasn't there before which looks like this...

- Course 213 - Claim Number 000106

Print Save Delete Claim

☐ Send Claim in Next Transmission
☒ Send Claim Again as a Correction

- Patient Charge

Visa Patient Charge Collected £ 42.40

Completed Date 03 / 07 / 2007 ☒ Save as Rejection

Incomplete Treatment Band ☐ Band 1 ☐ Band 2 ☐ Band 3

Tick the box that says “Send Claim Again as a Correction” and then re-submit the claim in the usual way. This will inform the DPB to ignore the previous claim with the same reference and use the new one instead.

Viewing Broadcasts

When the DPB wish to communicate with dentists they can send either a general message to all registered dentists or a specific message to your practice. These broadcast messages will be automatically picked up whenever you perform a send and receive action. You can view any new broadcasts by visiting the “Broadcasts” tab and either double-clicking the message in the grid or by selecting the “Open Broadcast” link at the bottom of the window.

Analysing UDA's and UOA's

Units of dental activity and units of orthodontic activity can be analysed using the “UDA/UOA Analysis” tab. You can filter the claims in the same way as on the claims tab, however rather than displaying the value each claim, the UDA and UOA of each claim is displayed instead. You can therefore view a specific dentist’s dental activity over a specified period of time or see the activity of the whole practice.

An additional feature in the program helps each dentist to keep track of how their UDA’s stand at any given time. To use this feature, ensure the “UDA/UOA Start Date” is entered into the staff tab of the staff members database. This gives you the ability to specify what day in the month you would like to start counting your UDA’s from. Once this is set, open a patient record. When you visit the charting the screen you will see the following boxes appearing just above the chart...

UDA Counter 3 UOA Counter 23

The counter displays the number of UDA’s you are contracted to get minus the number of UDA’s you have actually done up that point. This guide is based on the Acceptance Date of the NHS claim.

These counters display the currently logged on users UDA’s and UOA’s from the date specified in the counter date dialogue just described. These figures are updated whenever a new claim is made by the logged in dentist. The counter will reset at the beginning of each completed year so that the dentist can see at any time how many UDA’s he/she has completed.

Section 3 - Appendix

Appendix 1 – System Requirements

The minimum system specifications for running Comart Dental V5 are as follows...

Intel i3 Processor
2GB Memory
100Mb Hard Disk Space
17" 1024 x 768 Monitor Resolution.

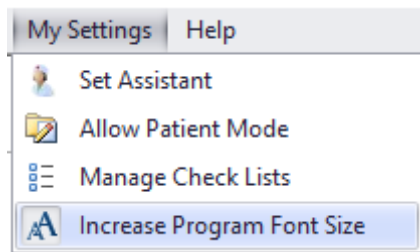
The recommended specifications are...

Intel i5 or i7 Processor (or higher)
8GB Memory
150Mb Hard Disk Space
21" 1280 x 1024 Monitor Resolution

Comart Dental V5 will run on any of the following Windows operating systems...

Windows XP
Windows Vista
Windows 7 (any version)
Windows 8 (any version except RT)
Windows 10 (any version)

With the increasing prevalence of bigger screens with smaller resolutions, the font size throughout the program has been set to Size 9. This can be changed to a smaller size by selecting "My Settings" from the menu at the top of your screen, and de-selecting "Increase Program Font Size".



Appendix 2 – Getting Technical Support

Please direct all of your support queries to support@comarholdings.com or call us on 0800 612 4875.

We can remotely control your computer by asking you to go to "Help" at the top of the screen, then selecting "Remote Support" and then "TeamViewer".

This will present you with an ID and a password which when given to us allows us to control your computer as though we were sitting in front of it.

We will do our best to answer your questions as soon as possible. If we cannot solve your problem over the phone we visit your site to correct the difficulty there.

Appendix 3 – Contacting Comart Dental

If you have any other questions or problems with regard to this product, please feel free to contact us:

Comart Dental
Technology House
Ridge Road
Rotherham
S65 1NS

Telephone: 0845 1302 999

Sales	sales@comarholdings.com
Support	support@comarholdings.com
Accounts	accounts@comarholdings.com