

## Using Dental Express

Patients come to our clinic by way of **Appointment** or **Walk-in**. So before we can **Admit** a patient we must first register them to the system.

**Case 1:** By way of appointment. Or a clinic visit scheduled sometime in the future.

Click on the toolbar button 'Appointment'.

Registered to: DEMO - [Appointment List]

Appointment

Show all pending appointment(s)   Sort By Entry ID   Sort By Date

07/04/2007   Grid View   Day View

End Time	Client ID	Title	Last Name	First Name	Middle Name	Status Desc	Schedule	Apmt Type	Physician	Description
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Search by Entry ID   Addnew   Delete   View/Edit   Admit Patient   Export to Outlook   Close

Ready   User: Administrator   5/03/2007   5:19 PM

A list will show (as shown above) detailing any pending appointment. Click on the calendar control to navigate in between any given days.

To add a new entry, click on the 'Addnew' button.

The screenshot shows a software window titled "Appointment" with the following fields and values:

- Entry ID / Appt Date:** [Empty] / 07/04/2007
- Client ID / Title:** CL100 (highlighted with a red box) / Mr.
- Last Name / First Name:** Dionisio / Edgardo
- Telephone / Mobile:** 523-1000 / (0919)6820033
- Start Time / End Time:** 08:30 am / 09:30 am
- Appointment Status:**  Confirmed,  Tentative,  Cancelled
- Scheduled visit:**
- Task Type:**
  - Normal (Blue square)
  - Priority (Green square)
  - Special (Magenta square)
  - Personal (Dark Blue square)
  - Charity (Cyan square)
  - Emergency (Red square)
- Chief Complaint:** Flouridization and Oral Prophylaxis
- Physician:** Dr. Aurel B. Cortez
- Remarks:** [Empty text area]

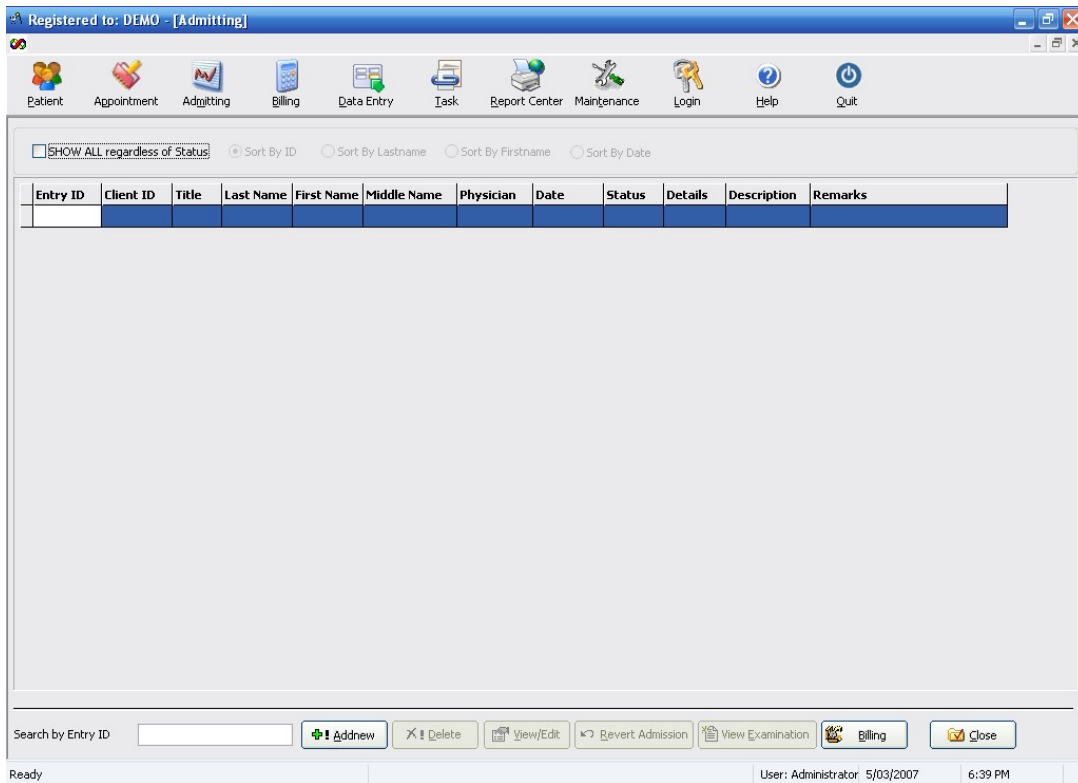
At the bottom of the window are three buttons: Save, Cancel, and Close.

Click on the Client ID button marked with an ellipsis [ ... ] to select a patient from our existing database. If you cannot find the patient in the Patient Lookup form you may need to encode a profile for this particular patient in the Patient Module. (See also [Creating Patient Profile](#))

After saving the changes you've made, you are then transferred back to the Appointment List. Now you have the option to admit this patient now or soon when this appointment is due. From this point on you can modify this same record or delete it for whatever reason.

## Case 2: Direct Admittance (Walk-in)

Click on the toolbar button 'Admitting'.



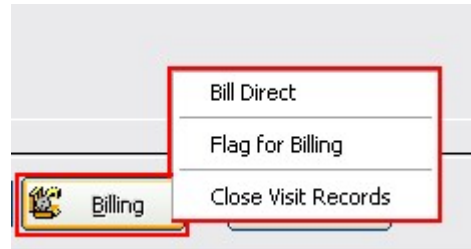
A list will show (as shown above) detailing any pending patient for admittance. This is where record will be transferred when you click on the button 'Admit Patient' in the Appointment section. To add a new entry, click on the 'Addnew' button.

Entry ID	
Client ID/ Title	CL100
LName/ FName/ MName	Dionisio
Admit Date/ Physician	05/03/2007
Chief Complaint	Flouridization and Oral Prophylaxis
Remarks	

Click on the Client ID button marked with an ellipsis [ ... ] to select a patient from our existing database. If you cannot find the patient in the Patient Lookup form you may need to encode a profile for this particular patient in the Patient Module. ([See also Creating Patient Profile](#)) and come back to this section later.

After saving the changes you've made, you are then transferred back to the Admitting List. If at any case this patient is not reverted (cancelled) to Appointment list then this is a good time to create a new examination for this patient. Click on 'New Examination' button to create a periodontal chart for this patient. Save any changes you've made so far. ([See also Creating Examination Chart](#))

After ending this patient's visit you need to bill this patient using the 'Billing' button. **Note:** Billing button will not be enabled unless an examination record exists for this visit.



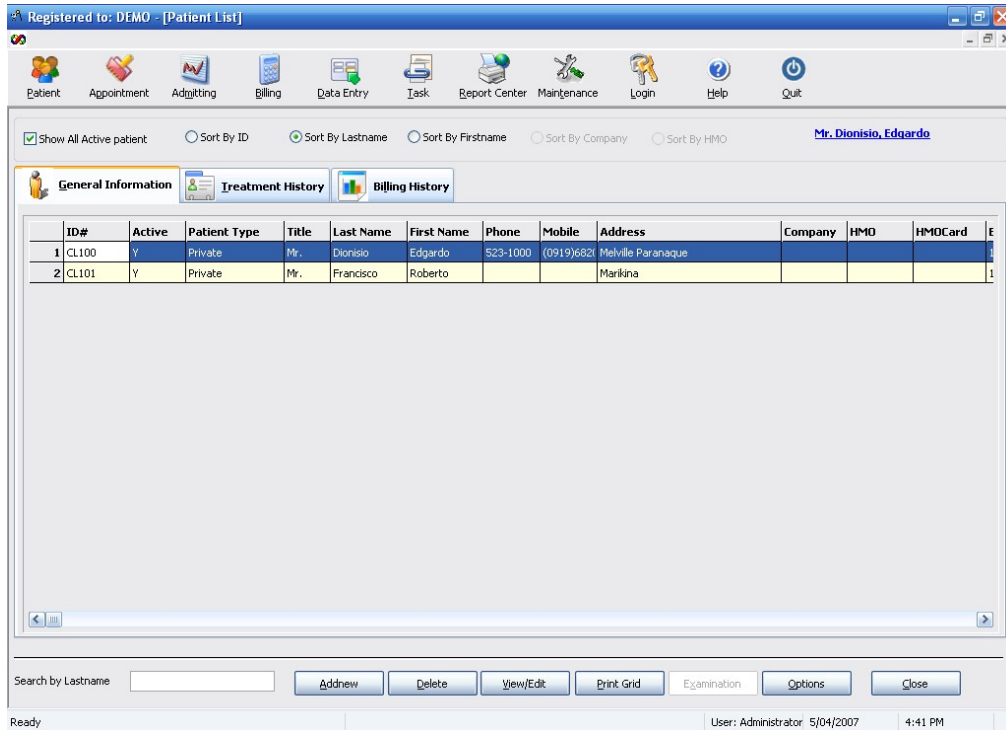
Upon clicking on the Billing button, you will be prompted to select whether to bill this patient directly or Flag this billing for later collection in the Billing Section. The following explains the popup menu in details.

- Bill Direct – This option will take you directly to the billing section without living the Admitting Module. You can instantly create invoice for this patient
- Flag for Billing - This option will mark this record for later billing in the Billing section. No invoice will be created.
- Close Visit Records – Simply closes this visit no billing will be made.

(See also [Creating Invoice and applying payment](#))

## Creating Patient Profile

Every patient in our database must contain profile. And this is being called from our lookup when creating a new Appointment (see also Case 1) or Admitting directly (see also Case2) an incoming patient. You can create a profile for a particular patient by way of the Patient toolbar.






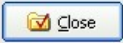
A list will show (as shown above) enumerating all patients that has been encoded in the system. You can search the database by filling-in the search textbox (lower left of the window) with partial or full text of your patient's Last name, First name or ID and hitting the enter key on your keyboard. If the search function returns a result. You can now tab on the Treatment History or Billing History to analyze previous visits from this particular patient.

To add a new patient profile, click on the 'Addnew' button and fill-up the required fields mark with asterisk (\*). You can automatically generate an ID by clicking on the 'Get ID' button. The system will automatically assign one unique ID for this profile. To add an image, right click on the picture object and select "Insert/Update image from file" to browse for photos stored on your local PC or select "Insert/Update Image from camera" to take a photo directly from a camera attached to your PC.

**Note:** When getting your image from file. The image photo must be resized to 156x116 pixels to fit exactly into the control. This is not needed when you take the image from camera.

**Patient Details**

<b>Active/ Patient Type</b>	<input checked="" type="checkbox"/> Orthodontic		
<b>ID</b>	CL102	 Get ID	
<b>Title</b>	Mr.	<b>Nationality</b>	Filipino
<b>*LName/ MName/* FName</b>	Eugenio	T	Marquez
<b>Date of Birth</b>	04/21/1969	<b>Age</b>	38
<b>Height</b>	5' 9"	<b>Weight</b>	180lbs
<b>Gender</b>	Male	<b>Status</b>	Single
<b>*Address1</b>	135 M. Magtanggol, Malibay, Pasay City		
<b>Address2</b>			
<b>*City</b>	Pasay	<b>Zip Code</b>	
<b>Mobile Phone</b>	09172530026	<b>Tel No.</b>	7289563
<b>E-Mail</b>	emarquez@gmail		
<b>Occupation</b>	System Analyst	<b>Referred</b>	
<b>Remarks</b>	This patient is on installment plan.		

 Save   
  Cancel   
  Close

After saving the changes you've made, you are then transferred back to the Patient List.

**TIP:** Another way of setting a new appointment or admitting a walk-in patient is by using the Patient List. Search for your particular patient in the list or add a new profile for new or incoming patient and click on the 'Option' button to set a new appointment or directly admit. This will take you to the Appointment detail section or the Admitting detail section.

## Creating Examination Chart

It is necessary that for every patient's visit a corresponding examination chart should be created to track the progress or history of treatments made. In the Admitting section if you click on the New Examination button with a patient selected in the list. You will be asked to create new treatment records, answer yes. The following form will show up.

This is the Visit Detail Form.

As you can see the arrow labeled 1, you can choose from two sets of teeth depending on your patient teeth structure (Permanent or Primary). 2 - You can pick and paint on the tooth the color coded legend to match the current state of your patients tooth. 3- You can also drag and drop the image as appropriate for the current condition of your patients tooth. The rest of the form comprises of questionnaire which is optional but is helpful when diagnosing any previous health history of the patient.

## Creating Invoice and applying payment

After the session is through, comes billing the patient for any treatments done. As discussed in the Admitting section under Billing, you are then taken to the Billing Section of the system.



**Invoice Header for - Personal Account**

Client ID : CL102      Visit Date : 05/08/2007  
 Client Name : Mr. Eugenio, Marquez T      Visit ID : 24  
 Company :      Physician :  
 HMO :      Benefits :  
 Card Number :      Invoice No. : INV4

	Entry ID	Code	Service	Quantity	List Price	Description	%Discount	Discount	Extended
1	47	1201	Y	1.00	500.00	Flouridization ar	0.00	0.00	500.00
2	48	NP01	N	1.00	130.00	Gum formulater	0.00	0.00	130.00

Remarks :

Status  
 Order/Invoice  
 Quote  
 Hold Open  
 Closed

Invoice Total : 630.00  
 Pay/Adj : -630.00  
 Balance : 0.00

Discount Given : 0.00

Click on the button marked with an ellipsis [ ... ] to generate a new invoice number. After obtaining an invoice number you can now select any treatments made from the 'Add Treatment' button or select an item to sell from the 'Add Item' button. Now you can apply payment for this invoice using the 'Payments' button. The detail of the transaction (invoice total, payment, balance) can be seen on the right side of the form. The arrow labeled 3: allow you to print/preview the invoice to be presented to the patient as a receipt.

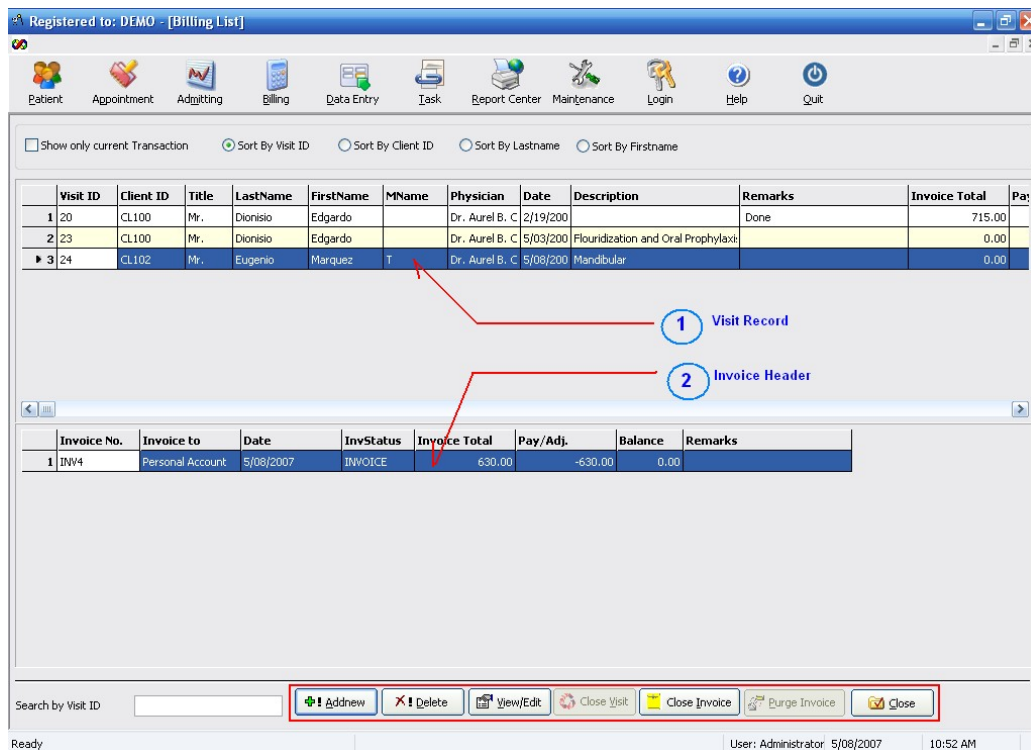
When you apply payments to zero-out the balance for any particular invoice, the system will ask you the following question:



If you answer yes, this will simply prevent you from applying any payments in the future. If you answer no, the invoice is still open and nothing is going to prevent you in adding treatments or items into the invoice until you manually close the invoice using the 'Close Invoice' button.

After closing the invoice you are required to purge the invoice using the 'Purge Invoice'. This button will transfer all visits records and billing statement to history for later viewing.

**Note: You cannot close and purge any invoice with outstanding balance. You need to apply full payments to the invoice before doing so.**



## **Billing List (Overview)**

The Billing List is presented above. The upper grid shows the Visit Record. In the lower grid shows the corresponding Invoice header for this visit. Clicking on the View/Edit button will show the details of this invoice. You can add new invoice (if none is present) or you can add multiple invoices on top of other invoices for this visit using the Addnew button. You can choose to delete invoice and create another (I suggest you to Edit the invoice instead). Or if there's really a need to delete this invoice –perhaps you decided to just end the visit and need not bill the patient. Then you use the 'Close Visit' button after deleting the invoice.

**Note: You cannot delete an invoice when payment has already been made or a treatment or items have been added to the invoice. Likewise, you cannot close a visit when the above conditions exist.**