



# Adding and using a custom screen in EXact

Copyright © 2020 Software of Excellence UK Ltd  
All rights reserved

## Adding a Custom Screen to Exact

To add one or all of the new COVID-19 custom screens to your system please follow the following instructions:

1. Download the custom screens from the 'hub' and place them into a location on your own PC/Laptop where they can be easily found.
2. Once downloaded open **EXact**, (ensure you have sufficient access rights to import them) go to configure and custom screens.
3. In the bottom right hand corner, you will see an import button, click on this button and search for the location of the custom screen you wish to import.
4. Highlight the custom screen to import and click open.
5. The custom screen is now in your system and ready to use.

## There are 2 ways custom screen are generally used

1. Onto an extra tab in the patient record.
2. Adding the screen onto a service code to record clinical information when treating a patient

## Adding a custom screen onto an Extra tab

1. Go to configure and patient file.
2. In the top left-hand corner, you will see Extra tab list 1 and Extra tab list 2.
3. Click in the box you wish to add the custom screen too
4. A striped box will appear at the side. Click this box and select your custom screen from the list.
5. Click OK.
6. The custom screen will be attached to the extra tab selected. Repeat this action in the other Extra tab box if you wish to add another custom screen.
7. Log out of **EXact** and back in to show the extra tab.
8. To use the custom screen, click on the tab and click +1 at the bottom of the page.
9. A tick will appear on the tab if there is information stored behind it. The custom screen will be date and time stamped.

## Adding a Custom Screen to a Service Code

1. Go to configure and services
2. Find the code you wish to add the custom screen onto, or alternatively you can make a new code if you wish.
3. Click in the custom screen box on the right had side of the service code.
4. A striped box will appear, click onto the box and select your custom screen.
5. You will then have 3 options on how the custom screen displays
  - a) Pop up disabled (you will need to double click on the custom screen when charted to use it).
  - b) Pop up when planned (the custom screen will pop up as soon as you chart the service code to which it is attached, you can close it and reopen by double clicking on it if you do not complete it at this time).
  - c) Pop up when completed. (The custom screen will pop up when you tick the service to which it is attached as complete).
6. Click OK and your custom screen is now attached and ready to use.

The software contains proprietary information of Software of Excellence UK Ltd; it is provided under a license agreement containing restrictions on use and disclosure and is also protected by copyright law. Reverse engineering of the software is prohibited.

Due to continued product development this information may change without notice. The information and intellectual property contained herein is confidential between Software of Excellence UK Ltd and the client and remains the exclusive property of Software of Excellence UK Ltd. If you find any problems in the documentation please report them to us in writing. Software of Excellence Software of Excellence UK Ltd does not warrant that this document is error free.

Microsoft Word, Microsoft Office, Excel, Windows®, Windows XP®, Windows 10™, Windows 7™, Windows Vista®, Windows NT®, MS-DOS™ are trademarks of the Microsoft Corporation.

Software of Excellence  
Medcare South  
Bailey Drive  
Gillingham Business Park  
Gillingham  
Kent ME8 0PZ

+44 (0)845 345 5767

Internet E-Mail: [support@soeuk.com](mailto:support@soeuk.com)

Website: <https://softwareofexcellence.co.uk/talk-to-an-expert/>

Subscribers' Portal: <https://portal.softwareofexcellence.com>