

This guide describes the **PreViser® MyAccount** including browser requirements and element descriptions.

For further information, contact: help@previser.com P: 888.854.0007



Copyright © 2020 – 2021 PreViser Corporation. All rights reserved.

The information contained in this document is the exclusive property of PreViser Corporation and, except for use by the authorized persons, shall not be distributed, reproduced, or disclosed in whole or part without prior written permission from PreViser.

HIPAA / HITECH

Pursuant to the Health Insurance Portability and Accountability Act of 1996 (HIPAA), the Health Information Technology for Economic and Clinical Health Act of 2009 (HITECH), and all applicable regulations promulgated pursuant to HIPAA and HITECH, every reasonable effort has been made to ensure that no text or screen prints contain individually identifiable health information. Wherever possible, the information used is test data and fictitious in nature. If you have any concerns about the information contained herein please contact your PreViser Account Manager or Privacy Officer.

Version History

Revision Level	Date	Description				
3.0	January 22, 2019	Original				
3.1	March 12, 2019	Updated screenshots & 'inactive' wording.				
3.2	February 21, 2020	From OHIS to Clinical Suite: Updated screenshots and wording.				
3.3	April, 2020	Added BAA information				
3.4	May, 2020	Updated screenshots				
3.5	February, 2021	Format Update				
3.6	July, 2022	Adding 'How to sell my practice' section				



CONTENTS

Registration	4
Logging In	7
Business Associate Agreement	8
Confirm Network Participation	8
Signing a Business Associate Agreement with PreViser:	9
Primary/Admin Users	
Additional Clinicians/Users	
Updating Your Account	
Edit Practice	
Change Password	
Picture/Logo	
Adding New Users/PINs	16
Changing PINs/Personal Information	16
Is Admin and Inactive Check Boxes	
What do I do if I sell my practice?	



REGISTRATION

Start on the PreViser PREVISER HOME CLINICIANS PATIENTS MY ACCOUNT SUPPORT website: https://www.previser.com/. PREVISER Industry Then click Clinicians. leading oral health Click Get a free Account. PREVISER[®] CLINICIANS PATIENTS MY ACCOUNT SUPPORT ~ HOME PREVISE Tooth experts? Kinda. Experts on and a stand and A page asking you to choose your country Welcome to PreViser MyAccount Management displays. Register for a free account Log in Select the country in which Please choose your country Username you are located from then Register for a PreViser account by Password choosing your country. If you already choose your country from have an account log in here. 🔒 Log in the drop-down menu. More Information Retrieve Password rieve User © 2019 - VPreViser <TEST/UAT>



The PreViser Registration -Search for your provider record page displays next.

Note: One registration per practice location.

Type in: Last Name,

Phone Number (use the phone number on file with dental insurance companies or the practice phone number),

and/or

Postal Code

Click Find My Practice.

If you were not able to find your practice, click **Continue** at the bottom of the page to display the PreViser Registration page and set up your account manually.

To complete manual registration, you will need both the state license number and NPI for the provider.

PreViser Registration

Search for your provider record

Note: To complete Use the Phone Nu	istration process, we'll try to locate your his registration you will need your state ber on file with dental insurance compa on per practice location.	license number.
Last Name:		
Phone Number:		
Postal Code:		
	Find My Practice	

To simplify your reg Note: To complete Use the phone num	provider record jistration process, we'll try to loca this registration, you will need bo ther on file with dental insurance ion per practice location.	the state license numb	ider.	
Last Name: Phone Number:	Slocum02			
Postal Code:	03046			
There were no sear	Find My Practice	criteria.		



Fill in the fields, red asterisks indicate required	PREVISER MyAccount ·			Proc	lucts - 🛛 🕄
fields.	PreViser Regist	ration			
	* Username	University of the state of the			
		Username must be at least 8 characters. May contain le	etters or numbers.		
	* Password	Password must be at least 10 characters. May contain I	etters or numbers and is	case sensitive.	
	[•] Confirm Password				
	* Practice Name				
	* Phone		Fax		
Add additional	* Account Email				
clinicians/users and be sure	Website				
to check the User has	* Address				
admin privileges check box					
for each as appropriate.	Address 2				
··· ···· ·· ···	* City				
	* State	Select State 🗸	Zip		
	Country	United States			
	Primary Clinician				
	Prefix		Email		
	* First Name		* Position	Select Position	~
Check the box to show you	Middle Name		* PIN		
read and agree with the	* Last Name			PIN must be a 5 digit number	
End User License	Suffix				
Agreement					
Agreement.	+ Add Another User				
	You must check the box bel	ow to register			
Click Complete	I have read and agree	to the End User License Agreement.			
Registration.	Complete Registration				
You should shortly receive a	🕒 Reply 🕞 Reply Al				
verification containing your	Tue 1/26/2021 11:10 AM				
next step.	help@previse				
next step.	To Activate Prev	Viser Account			
Click the link to complete	Retention Policy Defau	It 2 year delete (2 years)	Expires	1/26/2023	
Click the link to complete your account activation.	Denta	Associates You recently signed up for a pro-	eviser account with	the username	
,	To get started				
	Please Acti	vate your account			
	alternatively you can paste this url (https://my.previsertest.com/registration/activate/cGVnZ2lldGVzdHxONGNnbmV1cnhKY3VkNV12QmlB mlBalZoU1p1WnRwdGJibg=) into a browser to activate your account				
	If you did not ma	ke this request, please <u>contact PreViser imm</u>	ediately		
	Customer Service	Phone: 888-854-0007			



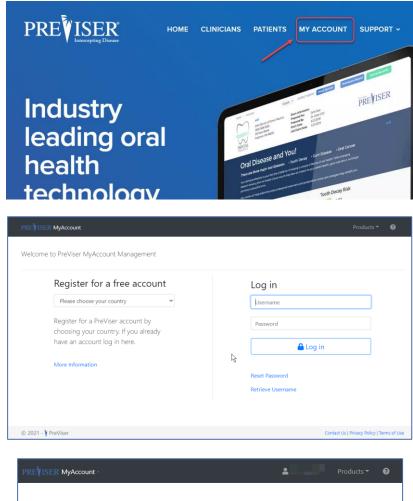
LOGGING IN

When logging in, you can start at the PreViser website: <u>https://www.previser.com/</u>, and click **My Account**

or type

<u>https://my.previser.com</u> into the address bar.

Log into PreViser's MyAccount with your username and password that was created during registration.



Type in the PIN number that you created when first registering for the account. This is a 5-digit number.

Click **Continue** to be logged in.

PREVISER MyAccount	:	● Products → 🕑
	Clinician/User PIN	
	PIN]
	Continue]
	If you cannot remember your PIN, please contact PreViser.	
	Log out]
© 2021 - 🕴 PreViser		Contact Us Privacy Policy Terms of Use



BUSINESS ASSOCIATE AGREEMENT

CONFIRM NETWORK PARTICIPATION

When new account providers log in for the first time, a page requesting that you *either* confirm your participation in a network listed in the dropdown field *or* electronically sign a HIPAA Business Associate Agreement (BAA) with PreViser.

* Be sure the person signing on behalf of the practice has the authority to do so.*

Check the box.

Select the insurer from the drop-down.

Type your name.

Click Submit Confirmation.

Note: If your practice is not innetwork with any of the insurers listed in the drop-down, click **then go here**.

If the person logging on does not have authority, this part can be signed later. Simply select the **Remind Me Later** option.

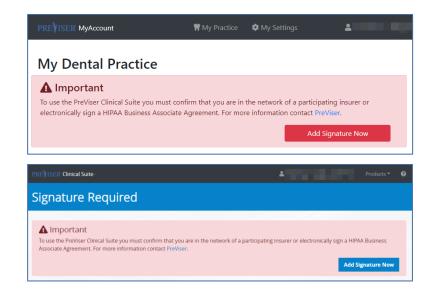
PREVISER MyAccount	🌹 My Practice	🏟 My Settings	4	▼ Products ▼ 🕑
My Dental Prac	tice			
Confirm Your Network	Participation			
participating insurer or ele	for PreViser. To use the PreVise ectronically sign a HIPAA Busin 9 By checking this box, I confirm tha indicated below.	ess Associate Agreement	For more information	
* In-Network With:	Select an Insurer		~	
* Your Name:				
		Remind Me Later	Submit Confirmatio	n
Or if your practice is not i	n-network with any of these in	isurers, then go here.		
© 2021 - 🕴 PreViser				Contact Us Privacy Policy Terms of Use

PREVISER MyAccount	🎀 My Practice 🎄 My Settings 🔹 🔹 Products 👻 🥹
My Dental Pra	tice
HIPAA Business Associ	te Agreement
, ,	for PreViser. To use the PreViser Clinical Suite you must electronically sign a HIPAA Business Associate and sign the Agreement below. You should retain a copy of this Agreement for your records. For more ser.
1	By checking this box, I confirm that I have read and agree with the Business Associate Agreement below. I also confirm that I have the authority to sign this document on behalf of my organization. Business Associate Agreement
" Your Name:	
	Remind Me Later Submit Signature
© 2021 - 🕴 PreViser	Contact Us Privacy Policy Terms o



Your clinicians will not have access to the Clinical Suite assessment tool until the BAA is signed.

These notices will display until a BAA signature is provided.



SIGNING A BUSINESS ASSOCIATE AGREEMENT WITH PREVISER:

Select any of the Add Signature buttons to go to the Confirm Your Network Participation page.	PREYISER MyAccount ♥ My Practice ♥ My Settings ■ ● Products * Ø My Dental Practice ● Add Signature ●
Click then go here to sign a BAA directly with PreViser.	Thank you for registering for PreViser. To use the PreViser Clinical Suite you must confirm that you are in the network of a participating insurer or electronically sign a HIPAA Business Associate Agreement. For more information contact PreViser. By checking this box, I confirm that my practice is in-network with the insurer indicated below. 'In-Network With: Select an Insurer 'Your Name:
	Remind Me Later Submit Confirmation Or if your practice is not in-network with any of these insure a then go here.
Read the BAA.	PREVISER MyAccount MMy Practice 💠 My Settings 🛓 Products 🔹 🥹
Check off the box stating you have read it.	My Dental Practice
Type your name (*again, only if you have the authority to do so on behalf of the practice *), and	HIPAA Business Associate Agreement Thank you for registering for PreViser. To use the PreViser Clinical Suite you must electronically sign a HIPAA Business Associate Agreement. Please review and sign the Agreement below. You should retain a copy of this Agreement for your records. For more information contact PreViser.
Click Submit Signature .	Information Contact Preview By checking this box, I confirm that I have read and agree with the Business Associate Agreement below. I also confirm that I have the authority to sign this document on behalf of my organization.



Edit Practice

Choose image

2.

2

Filter Users:

50.237.40.162 2/2/2021 11:34:20 AM

Date/Time (Central Time)

Save Image

Add Clinician/U

Add Signature

t Us | Privacy Policy | Te

Browse



The following page will display a **Successfully Added Signature** message at the top.

Information about your account is also shown including, a list of your users and when and by whom the BAA was signed.

Functions you can launch from this page are:

- Clinical Suite Login
- Edit Practice
- Change Password
- Choose Image
- Add Clinician/User
- Add Signature (BAA)

A successfully added signature
automatically sends you an
email with a PDF copy of the
BAA attached.

io i	
🔤 Messag	pe PreViser-HIPAA-BAA.pdf (389 KB) ATT00001.htm (462 B)
	From: help@previser.com
	Date: February 2, 2021 at 12:34:39 PM EST
	To:
	Subject: PreViser Account, Signature Added
	Your PreViser Practice Details have been updated
	Thank you for confirming that you have read and agree with the PreViser Business Associate Agreement. A copy of the agreemen attached for your records.

Successfully Added Signature

My Dental Practice Status: Active

> PreViser Enterprise: No Early Adopter: No

Active Clinicians/Users

11 Last

Business Associate Agreement

PreViser Corporation N S 22

S' 02

Signed / Confirmed By

First

Marg

BAA With

© 2021 - YPreViser

Username:

Email:

Position

X-ray Clinic Techni

IP Address

Phone:

Address: United States



PRIMARY/ADMIN USERS

The **Primary/Admin User** is the person who registered for the PreViser Account. Only this person has control over the account until he or she adds another user with admin privileges. Users with admin privileges will have a green logo on the right side of the position column.

When a Primary/Admin User	PREVISER MyAccount	с• 🎀 Му	Practice 🏾 🏟 Mj	y Settings	• Products • 🚱		
logs into MyAccount, this landing page displays:	My Dental P Statu Usernam	S: Active			Clinical Suite Login		
Primary User/Admins can update the following account information: • Practice address	Gaennin Erna Phon Addres PreViser Enterpris	e: United States			Edit Practice Change Password		
• Practice phone number	Early Adopte	er: No					
Practice logo					Choose image Browse		
 Add clinicians/users and assign admin credentials 	Active Clinicians	:/Users			Save Image		
 Update PINs and user 	First 14 I Marg S		ion Clinic Technician	11	Add Clinician/User		
information.				Filter Users:			
	Business Associate Agreement						
	BAA With PreViser Corporation	Signed / Confirmed By	IP Address 50.237.40.162	Date/Time (Central Time) 2/2/2021 11:34:20 AM	Add Signature		
Note: Whenever you make a change to your account, automatic emails are sent to notify you of the change.	© 2021 - V PreViser From: Date: F To: Subjec Your New C Name: If you of	help@previser.com ⁷ ebruary 2, 2021 at t: PreViser Accou r PreViser P linician Added I R	1:39:27 PM nt, Clinicia Tractice	IEST n Added Details have b	Contact Us Physey Policy Terms of Use		



Additional Clinicians/Users

Additional Clinicians/Users are the clinicians/users who are added to the account.

Additional Clinicians/Users without admin privileges will see this landing page:

Additional users who do not have admin privileges will appear on this list with a black logo on the left side of the position column.

These users can access MyAccount with their own PINs, but do not have admin privileges to change the PINs or information of other users.

PREVISER MyAccount	₩ №	ly Practice 🛛 🏶 My	y Settings		
My Dental P	ractice				
Status					Clinical Suite Login
Username					
Emai	e vir di ogio				
Phone	2				
Address					
PreViser Enterprise	: No				
Early Adopter	n No				
Active Clinicians, First	/Users _{Last}	Position			
N	5'	X-ray Clinic Tech	nician	2/	
New person01	New01	Dental Assistant		1	←
Business Associa	te Agreement				
BAA With	Signed / Confirmed By	IP Address	Date/Time (Central Time)		Add Signature
PreViser Corporation	Ni _ ii	50.237.40.162	2/2/2021 11:34:20 AM	b 2	
© 2021 - 🕴 PreViser					Contact Us Privacy Policy Terms of Use



UPDATING YOUR ACCOUNT

EDIT PRACTICE

To make changes or updates to the account, log in and click **Edit Practice**.

This is where you have the option to update most of your account information.

Note: The username for the account chosen at the time of registration cannot be changed.

Click the **Save** button when all desired changes are made.

Website:

Address 1:

Address 2:

* State:

* Zip:

Country:

5Tenny Lane

Concord

03302

United States

New Hampshire

PREVISER MyAccount ·	🌹 My Practice 🔹	My Settings		- Produc	ts 🕶 🔞
My Dental Practio	e				
Status: Activ				Clinical Suite I	ogin
Username:					
Email:			\longrightarrow	Edit Practio	:e
Phone:				Change Passv	vord
Address:					
Unite	d States				
PreViser Enterprise: No					
Early Adopter: No					
				Changes images	Browse
				Choose image	Browse
				Save Imag	e
Active Clinicians/Users					
First 14 Last	11 Position	14		Add Clinician/	'User
Marg Si 02	X-ray Clinic Technicia		2 /		
		Filter Users:			
Business Associate Agr	eement				
BAA With Signed	/ Confirmed By IP Address	Date/Time (Central Time)		Add Signate	ure
PreViser Corporation N S)2 50.237.40.16	2 2/2/2021 11:34:20 AM	1		
© 2021 - Y PreViser				Contact Us Privacy Pol	icy Terms of Use
PREVISER MyAccount	🌹 My Practice 🛛 🏟	My Settings		, Prod	lucts 👻 💡
	,	, , _			-
← My Dental Prac	tico				
Edit Practice	lice				
M Edit Fractice					
*Name: My	Dental Practice			Save	e
* Email:					
	net				
* Phone:					



CHANGE PASSWORD

Click Change Password.

Passwords must be 10 characters or more and not contain spaces.

Type the new password.

Tab to the confirm password field and type the new password again.

If they match, no prompts in red font will display.

Click Submit.

My Dental Pr	actice				
Status:	Active				Clinical Suite Login
Username:	-				
Email:					Edit Practice
Phone:				\rightarrow	Change Password
Address:					
	United States				
PREVISER MyAccount		My Practice	My Settings		Products
A Mar Dante	Durant an				
🗲 My Denta	I Practice				
🔎 Change Passwo	rd				
		new password			
		confirm passwo	ord		
			Submit		
			Filter Users:		
Business Associat	e Agreement		Filter Users:		
Business Associat	-	IP Address			Add Signature
BAA With	e Agreement Signed / Confirmed By	IP Address 50.237.40.162	Date/Time (Central Time)		Add Signature
BAA With	Signed / Confirmed By		Date/Time (Central Time)		Add Signature



PICTURE/LOGO

You also have the option to market your practice by uploading a picture of the dentist or logo of the practice.

This image will appear on the patient report generated by the clinical assessment tool, the Clinical Suite.

The image must be in *jpeg, *png, or *gif format and less than 10 MB in size.

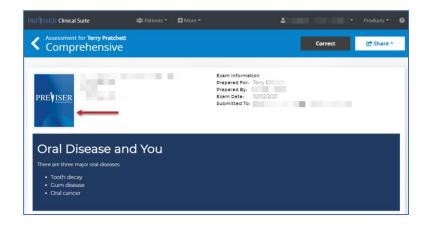
To upload an image:

Click **Browse** and navigate to the location on your computer in which your image is stored.

Select the image and click **Save**.

Once selected and saved, the image will appear on the patient report as shown:

'	nt	🎀 My Practice	🏟 My Settings	۵.		- Produ	icts = 🕜
My Dental	Practice						
Sta						Clinical Suite	Login
Usernai	me:						
Em	nail:	r ji i i i				Edit Prac	tice
Pho	one:					Change Pas	sword
Addn	Concord, NH 03 United States	302					
PreViser Enterpr	rise: No					PREVIS	ER
Early Adop	oter: No						
					_		
						Choose image	Browse
						Choose image Save Ima	
							ige
Active Clinician	ns/Users					Save Ima	ige
	ns/Users	Position				Save Ima	nage
First 11		Position X-ray Clinic Tec	hnician	п	2/	Save Ima	nage
First 11	Last		hnician	11		Save Ima	nage
First 11	Last S'	X-ray Clinic Tec		TI r Users:	2/	Save Ima	nage
M Is	Last S'	X-ray Clinic Tec Office Staff			2/	Save Ima	nage
First 11	Last Simmin	X-ray Clinic Tec Office Staff	Filte		2	Save Ima	nage





ADDING NEW USERS/PINS

To be HIPAA compliant, an individual PIN should be assigned to anyone who has access to the Clinical Suite and can touch patient records. Additional users log in using the account's username and password and their own, unique PIN.

Note: When distributing PINs to your team, stress the importance of not sharing the numbers.

As the Primary User/Admin, you can add other users to the My Dental Practice account by clicking the Add Status: Active Clinician/User button. Username: Email: Edit Practice Phone: The list of all active users who Concord, NH 03302 United State have been added under the ProVisor Enterprise: No PREVISER account displays below the Early Adopter: No Active Clinicians/Users heading. Browse Choose image (If you have inactive users, a Save Image Show Inactive (#) button Remove Image displays under the Add Active Clinicians/Users Clinician/User button. First Last Position Add Clinician/Use X-ray Clinic Techni ۰. S Show Inactive (1) New person01 New01 Dental Assistant . Click Add Clinician/User. Filter Users: **Business Associate Agreement** Simply fill in the information, IP Address Date/Time (Central Time) **BAA With** Signed / Confirmed By Add Signature create a unique PIN for that PreViser Corporation M _ _ 2 50.237.40.162 2/2/2021 11:34:20 AM 2 user, and click Add Clinician at the bottom. **Note:** If the additional users are licensed dentists or ← My Dental Practice independent practitioners, 🔓 Add Clinician NPI#, primary practice State, and State License# are Additional Clinician/User Prefix Email required. * First Name New person01 Denturist These fields will not display for Middle Name * NPI # additional users who are not * Last Name New01 * State Select State licensed dentists or other Suffix License # independent practitioners. 🗌 Is Admir 12347 PIN Inactive

CHANGING PINS/PERSONAL INFORMATION

Any user (Admin or not) can log in with their PIN and change their PIN and their personal information.

© 2021 - 🕴 PreViser

Contact Us | Privacy Policy | Terms



Note: Admin/Primary Users

can make changes to other users' information by clicking any user's name from the list of clinicians.

Unless the user making the changes has been given admin privileges, they will not have the ability to make changes to the "Is Admin" or "Inactive" check boxes.

Click **My Settings** at the top of the page.

The Edit Clinician page displays containing the fields appropriate to the selected person's position.

Make the required updates and click **Save Clinician**.

All changes will send a confirmation email to your account's email address.

	ISER MyAccount	श Му	Practice 🏼 🌣 My	Settings	1	Products
<pre>created water represent to the service of the provide of the</pre>	v Dental Pra	ctice				
In the present of the presen						Clinical Suite Login
For a set of the formation of the for	Username:					
tere de general in a de la de	Email:					
<pre>verse verse v</pre>						DD DE FORD
tore constrained of the second	Address:					PREVISER
tore constrained of the second						
tive Clinicians/Users						
st Last Postion w person 01 New 01 Demail Assistant A with Signed / Confirmed By P Address Data/Time (Central Time) Add Signature With Signed / Confirmed By P Address Data/Time (Central Time) Add Signature Add Signature Contrat to Practy Confirmed By P Address Data/Time (Central Time) Add Signature Contrat to Practy Confirmed By P Address Data/Time (Central Time) Add Signature Contrat to Practy Confirmed By P Address Data/Time (Central Time) Add Signature Contrat to Practy Confirmed By P Address Data/Time (Central Time) Add Signature Contrat to Practy Confirmed By P Address Data/Time (Central Time) Add Signature Contrat to Practy Confirmed By P Address Data/Time (Central Time) Add Signature Contrat to Practy Confirmed By P Address Data Contrat to Practy Confirmed By P Address Data Contrat to Practy Confirmed By P Address Data Source Data Data Signature New 01 Signature New 01 Signature Source Data Data Data Data Signature Source Data Data Signature Source Data Data Signature Source Data Data Data Data Data Data Data Dat	Early Adopter:	NO				
w person 1 New01 Dental Assistant statess Associate Agreement A Win Sugned / Confirmed by if Address Data/Time (Central Time) Add Signature will Previour Corporation Line Social Previous P	tive Clinicians/U	sers				
<pre>wprenon01</pre>	it .	Last	Position			
siness Associate Agreement Avite Signed / Confirmed by P Address Soc277A3162 22/2021 1134-20 AM Carter Corporation Carter & My Produc Soc277A3162 22/2021 1134-20 AM Carter Corporation Carter & My Produc Carter & My Produc Carter & My Produc My Produ	D	5'	X-ray Clinic Techr	ician	2/	
A Vitit Signed / Confirmed By P Address Data/Time (Central Time) Add Signature View Corporation View Substrated View Correct to 1 Pracy May Neurol View Correct to 1 Pracy Neurol View Neurol View Correct to 1 Pracy Neurol View Correct to 1 Pracy Neurol View Correct to 1 Pracy Neurol View Neurol View Correct to 1 Pracy Neurol View Correct to 1 Pracy Neurol View Neuro	v person01	New01	Dental Assistant		1	
A With Signed / Confirmed By P Address Data/Time (Central Time) Add Signature Were Composition Number of S0.237.40.162 2/2/2021 11.34.20 AM With View Composition Number of S0.237.40.162 2/2/2021 11.34.20 AM With View Composition Number of S0.237.40.162 2/2/2021 11.34.20 AM With View Composition Number of S0.237.40.162 2/2/2021 11.34.20 AM With View Composition Number of S0.237.40.162 2/2/2021 11.34.20 AM With View Composition Number of S0.237.40.162 2/2/2021 11.34.20 AM With View Composition Number of S0.237.40.162 2/2/2021 11.34.20 AM With View Composition Number of S0.237.40.162 2/2/2021 11.34.20 AM With View Composition Number of S0.237.40.162 2/2/2021 11.34.20 AM With View Composition Number of S0.237.40.162 2/2/2021 11.34.20 AM With View Composition Number of S0.237.40.162 Additional Clinician/User With View New Person01 Number of S0.237.40.162 Number o						
Vier Corporation No. 237.40.162 22/2021 113420 AM Image: Control to Provide the contto to Provide the control to Provide the cont	siness Associate	Agreement				
21 Y Protee CISCR MyAccourt WMy Practice → CMY Dental Practice → Edd Clinician Additional Clinician/User - ************************************						Add Signature
Image: Start Mydecourt Image: Optimized and the start of the st	iser Corporation	ing diamath	50.237.40.162	2/2/2021 11:34:2	0 AM 🛃	
Image: The second se						
My Dental Practice Edd Clinician Additional Clinician/User web "refit	021 - 🕴 PreViser					Contact Us Privacy Policy Terms of Use
My Dental Practice Edit Clinician Mditional Clinician/User refs refs refs refs refs refs refs refs refs refs						
Edit Clinician Additional Clinician/User refs reff refs refs refs refs refs reff reff reff reff reff reff reff reff reff <	EVISER MyAccount	11 M	y Practice 🛛 🏼 🏟 N		A :	- Products -
'First Name Medde Name 'Last Name 'Last Name 'Last Name 'Last Name Suffix 'Last Name 'Last Name 'Last Name 'Last Name Suffix 'Last Name Suffix Suffix </th <th>ᅪ Edit Clinician</th> <th></th> <th></th> <th></th> <th></th> <th></th>	ᅪ Edit Clinician					
Middle Name Image: Suffice 'List Name New01 Suffice Save Clinican Native: D Save Clinican 2021- PreViser Contact by Privacy Packy Term Date: February 4, 2021 at 9:10:10 AM EST To: Subject: PreViser Account Notification, Clinician Updated, Clinician Modified Name: New person01 New01 User is active Prefix was set to Mr If you did not make this request, please contact PreViser immediately	Prefix			Email		
`Last Name New01 suffix Is Admin □ 'suffix Save Clinician Date: February 4, 2021 at 9:10:10 AM EST To: Is Subject: PreViser Account Notification, Clinician Updated. Vour PreViser Practice Details have been updated Name: New person01 New01 User is active Prefix was set to Mr If you did not make this request, please contact PreViser immediately	* First Name	New person01		* Position	Dental Assistant	
suffix Individe Super Christian Super Christian Super Christian Control (1) Previous Control (1) Previous Policy (2) Previous Christian Control (2) Previous Control (2) Previ	Middle Name			* PIN	12347	
swe Chicken Trom: help@previser.com Date: February 4, 2021 at 9:10:10 AM EST To: Subject: PreViser Account Notification, Clinician Updated. Vour PreViser Account Notification, Clinician Updated. Clinician Modified Name: New person01 New01 User is active Prefix was set to Mr If you did not make this request, please <u>contact PreViser immediately</u>	* Last Name	New01				
Swe Clinician 2021 • JrewSer Control of the provider of the	Suffix					
Swe Clinician Contact 16 Privacy Policy Termediated From: help@previser.com Date: February 4, 2021 at 9:10:10 AM EST To:	t.	s Admin: 🗆				
2021 • Y reviser Contact PreViser immediately Contact of Previser Account Notification Clinician Updated. Clinician Modified Name: New person01 New01 User is active Prefix was set to Mr	1	nactive: 🗆				
2021 • Y reviser Contact PreViser immediately Contact of Previser Account Notification Clinician Updated. Clinician Modified Name: New person01 New01 User is active Prefix was set to Mr					Save Clinician	
From: help@previser.com Date: February 4, 2021 at 9:10:10 AM EST To: Subject: PreViser Account Notification, Clinician Updated. Your PreViser Practice Details have been updated Clinician Modified Name: New person01 New01 User is active Prefix was set to Mr If you did not make this request, please contact PreViser immediately					Save Cimician	
From: help@previser.com Date: February 4, 2021 at 9:10:10 AM EST To: Subject: PreViser Account Notification, Clinician Updated. Your PreViser Practice Details have been updated Clinician Modified Name: New person01 New01 User is active Prefix was set to Mr If you did not make this request, please contact PreViser immediately	2021 - 🔰 PreViser					Contact Us Privacy Policy Terms o
Date: February 4, 2021 at 9:10:10 AM EST To: Subject: PreViser Account Notification, Clinician Updated. Your PreViser Practice Details have been updated Clinician Modified Name: New person01 New01 User is active Prefix was set to Mr If you did not make this request, please <u>contact PreViser immediately</u>	,					
If you did not make this request, please <u>contact PreViser immediately</u>	Date: Febr To: Subject: P Your P Clinician M Name: New User is acti	uary 4, 2021 at 9 reViser Accoum PreViser Pr Modified v person01 New ive	t Notificati ractice	on, Clinicia		n updated
Customer Service Phone: 888-854-0007			quest, pleas	e <u>contact Pr</u>	eViser immedi	ately
	Customer	Service Phone: 88	38-854-000	7		



IS ADMIN AND INACTIVE CHECK BOXES

A major difference for the <u>Admin/Primary User</u> versus other users are the "Is Admin" and "Inactive" options. When a user's **Is Admin** box is checked, that user now has read/write access within the account and can make changes to the account and to other users' information.

This is useful for office managers who may be in charge of updating the email address, phone number, picture, etc. within the account.

Inactive is used when you wish to temporarily suspend Clinical Suite access to a team member.

Note: If the user is associated with a prior Clinical Suite assessment and has been made "inactive," the assessment history associating that clinician with the patient will be preserved.

If the Primary/Admin Users need to view all of the inactive users, simply click **Show Inactive**.

To return to active users, click

Show Active.

PREVISER MyAccount		🎀 My Practice	🍄 My Settings	1		0
← My Dental	Practice					
Additional Clini	cian/User					
Prefix			Email			
* First Name	New person01		* Position	Dental Assistant		
Middle Name			"PIN	12347		
* Last Name	New01					
Suffix						
	Is Admin: Inactive:					
				Save Clinician		
						_
© 2021 - 🕴 PreViser				Con	tact Us Privacy Policy Ter	rms of U

First	11 Last	11 Position		Add Clinician/User
Marg	S)2	X-ray Clinic Technician	2/	
New person01	New01	Dental Assistant	1	Show Inactive (1)

rst	Last	¶1	Position		Add Clinician/User
belle	R		Office Staff		

WHAT DO I DO IF I SELL MY PRACTICE?

Assuming the new practice owners want to keep all the patient info....

The **old** owner should: supply the username/password to the new owner.

The **new** owner should: log in to <u>https://my.previser.com</u> and do the following:

PreViser Corporation Company Proprietary



#1) click edit practice to change the practice details (it is important to make sure the EMAIL address is updated to a valid email)

#2) click change password

#3) Add a new Clinician who is the new Primary Dentist.

#4) Create a ticket at <u>https://www.previser.com/support/contact-us/</u> and tell us the account username AND the name of the new Primary Dentist (added in step 3).

To use the PreViser Clinical Suite, the practice should use the old username and the new password.

Any existing Active Clinicians will continue to use their existing PIN #s.

All patient info will be retained under this account.

If the new owners have more than one practice location and they want to view patients from multiple practices (including the newly purchased practice), they can upgrade to Enterprise Solutions.

If they have trouble or if we can supply any assistance, they can call 888-854-0007 or create a support ticket at: <u>https://www.previser.com/support/contact-us/</u>

PREVISER MyAccount - 1	TEST/UAT ONLY 🛚 🎀 My	Practice 🛛 🌣 My Settings	🙎 testshane > testsha	ne t 🔻 🛛 Products 🔻 🕜
Test Practice s	hane			
Status:	Active			Clinical Suite Login
Username:	testshane		0	
Email:	sgildnes@previser.com			Edit Practice
Phone:	(360) 123-9877			Change Password
Address:	123 Any St. USA Test City, ME 98273 United States		2	
PreViser Enterprise:	Yes			
Early Adopter:	Yes			Choose image Browse
				Save Image
			$\backslash [$	Remove Image
Active Clinicians/U	lsers			
First	11 Last	11 Position	11	Add Clinician/User
testshane	testgildnes	General Dentist	2/	
newtest	assistant	Dental Assistant	±	
testshane2	testshane2	Other	±	



Now you are ready to begin using PreViser's assessment tool – the Clinical Suite!

To navigate to the Clinical Suite from MyAccount, go back to the main page and click the blue **Clinical Suite Login** button.

PREVISER MyAccount	* N	ly Practice 🌼 My	y Settings 💦 🚢		- Products - 3
My Dental P	ractice				
Status			_	\rightarrow	Clinical Suite Login
Username	2:				
Emai	l: vir line ogin '				
Phone	2.				
Address	52				
PreViser Enterprise	e: No				
Early Adopter					
Active Clinicians	/USERS Last	Position			
N	5'	X-ray Clinic Tech	nician	2/	
New person01	New01	Dental Assistant		*	
Business Associa BAA With	ite Agreement Signed / Confirmed By	IP Address	Date/Time (Central Time)		Add Signature
PreViser Corporation		50.237.40.162	2/2/2021 11:34:20 AM	1	
© 2021 - 🕴 PreViser					Contact Us Privacy Policy Terms of Use

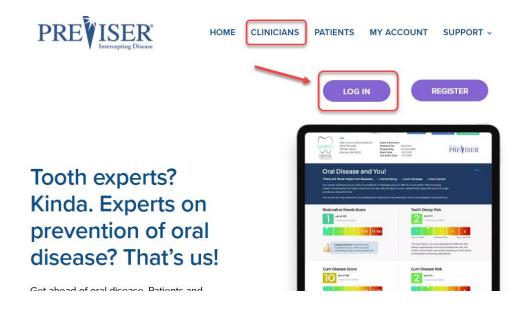
This will take you directly to the log in page:

PREVISER Clinical Suite			💄 My Account	Products 👻	Ø
	PRE	ISER® Intercepting Disease			
	Username				
	Password				
	PIN				
	LO	GIN			
	Forgot password?	Forgot username?			
	Register for a	new account			
Privacy End User License Agreement			Copyright PreViser 2003	-2021 All Rights Res	served



When you get to the Clinical Suite log in page, type in the credentials you used to register for/sign in to PreViser's MyAccount.

OR You can start on the PreViser website: <u>https://www.previser.com/</u>, then click **Clinicians**. Click on the **Login** button at the top of the **Clinicians** page:



See PreViser's <u>Clinical Suite documentation</u> to learn more about the Clinical Suite.

For Videos, Trainer Resources, additional documentation and more, go to https://www.previser.com/support/.