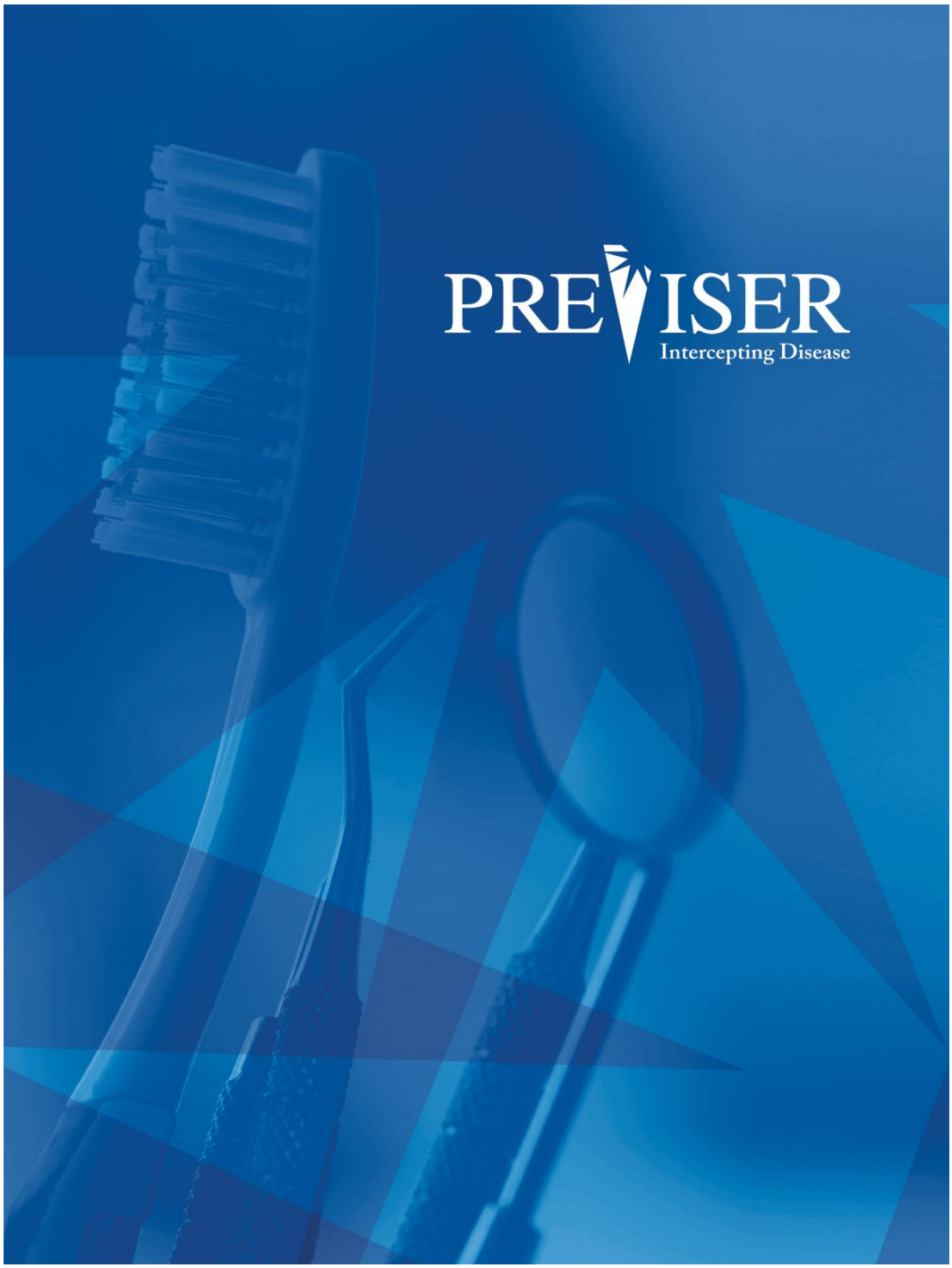

This guide describes the **PreViser® Clinical Suite**

For further information, contact:

help@previser.com

P: 888.854.0007

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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
5.0	02/2020	Original
5.2	06/2020	Added mobile shortcut, assessment import, emailing reports, and submitted to insurer sections. Updated encryption key section. Updated all screenshots.
5.3	12/2020	Added Health Questionnaires section and updated screenshots.
5.4	03/2021	Added: Home Care Report, Deleting Assessments, Forgot PIN, Privacy Mode, DOB as search criteria, Contextual Help, a What's Changed section to Comprehensive risk assessment. Updated all screenshots.
5.5	9/2021	Added: Clinical Inputs and Practice Reports
5.6	12/2021	Added December 2021 release features and modified existing screenshots to reflect the latest functionality. Added the *Enterprise Features* section.
5.9	03/2022	Changed screenshots to reflect modified Products dropdown. Added Health Questionnaire video link.
5.10	06/2022	Changed screenshots to reflect modified PreViser.com site. Added section about hiding PHI in the Insurer section on the Patient page.
5.11	11/2025	Updated screenshots after adding vaping and HPV questions, rearranging the Patient screens and adding Subscriptions.
5.12	02/2026	Corrected invalid links.

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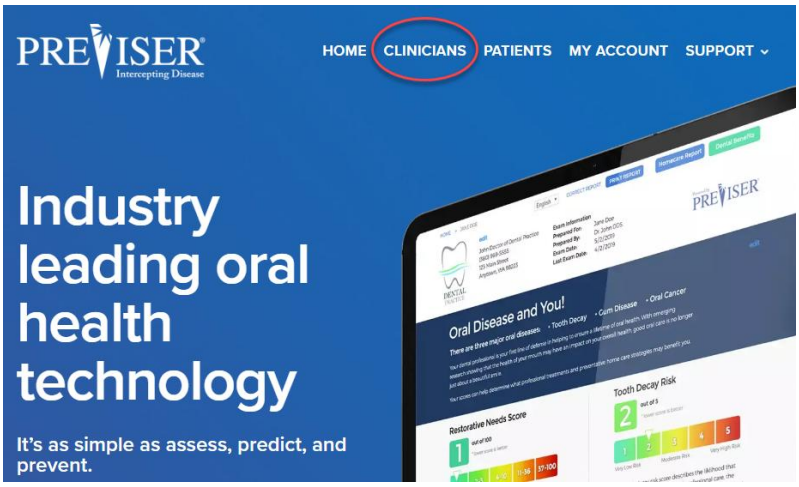
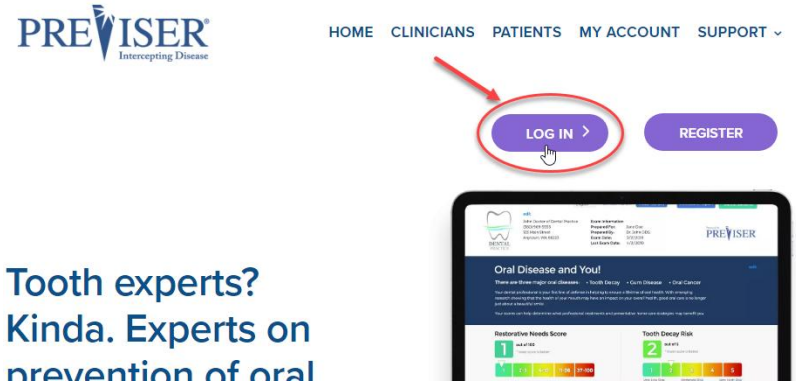
Getting Started with the Clinical Suite

You can reach the Clinical Suite URL directly by entering this URL into a browser: https://secure.previser.com/clinical

or from www.previser.com: Click the **Clinicians** tab:

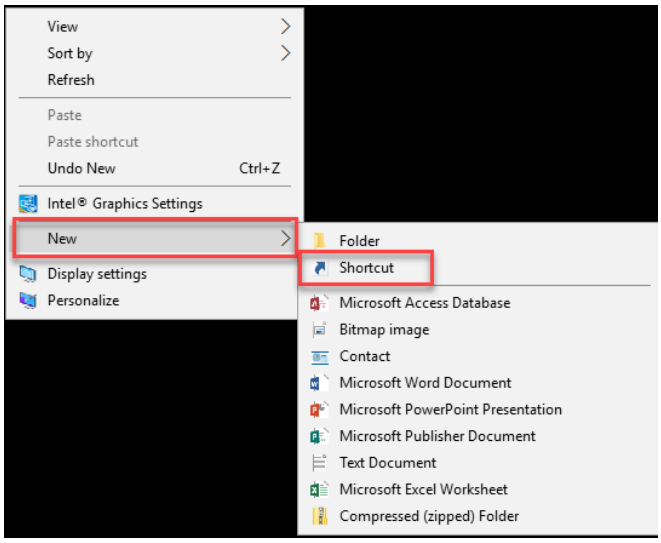


then click **Access PreViser Clinical Suite Here**

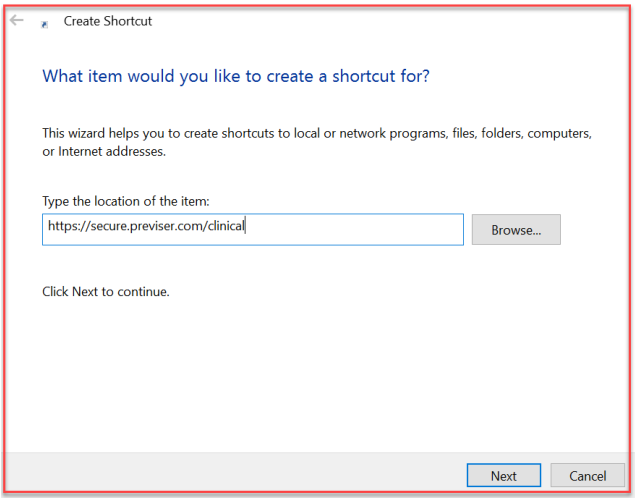


To Create a Shortcut on Your Desktop

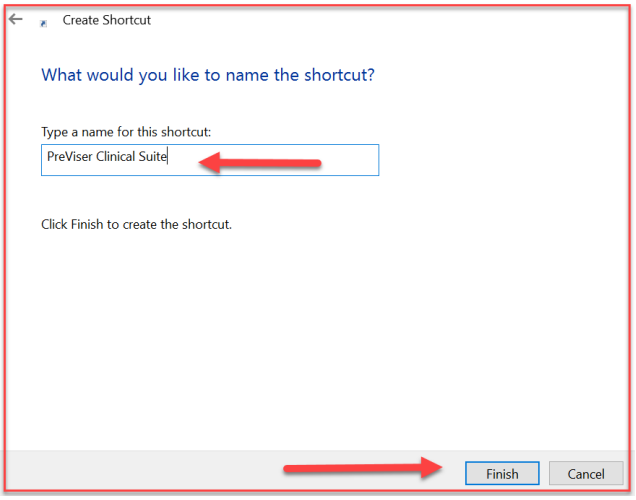
1. Right-click anywhere on your desktop.
2. Select **New** and then **Shortcut**.



3. Enter https://secure.previser.com/clinical into the Shortcut address box.
4. Click **Next**



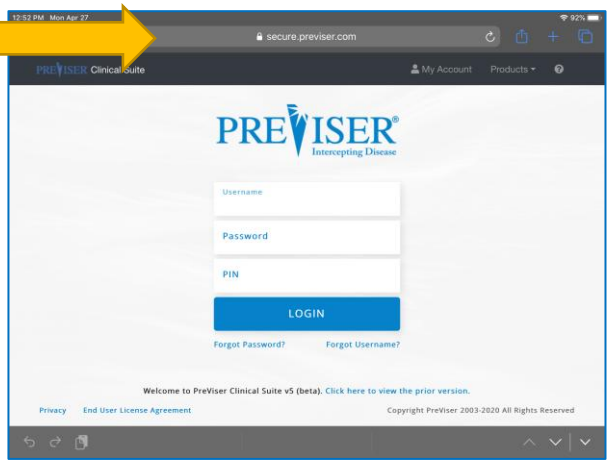
5. Enter the name of the Shortcut (PreViser Clinical Suite) into the box.
6. Click **Finish**.



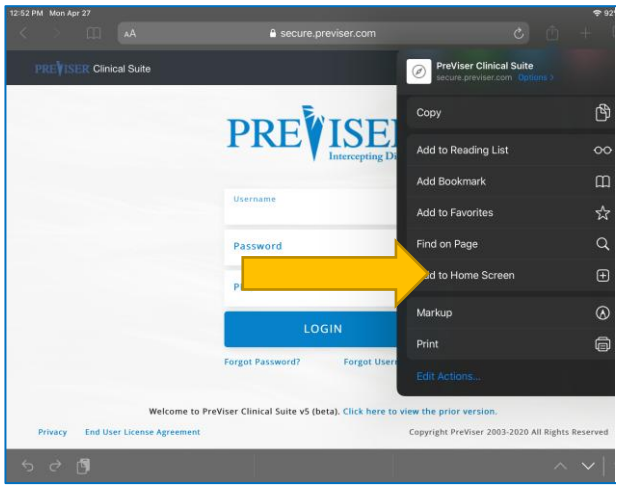
You will now have a shortcut displayed on your desktop labeled **PreViser Clinical Suite**.

To Create a Shortcut on Your iPad

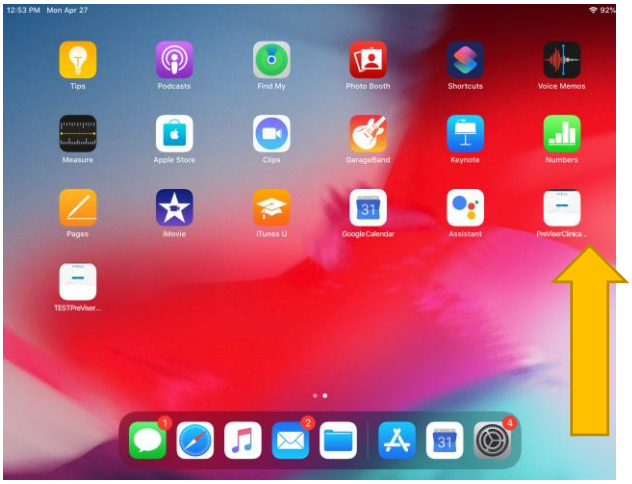
1. Open Safari on your home screen and enter https://secure.previser.com/clinical in the navigation bar:



2. Tap the Share Icon and tap **Add to Home Screen**.
3. Enter the name PreViser Clinical Suite and tap **Add**.



4. You can now easily access PreViser Clinical Suite on your Home Screen!



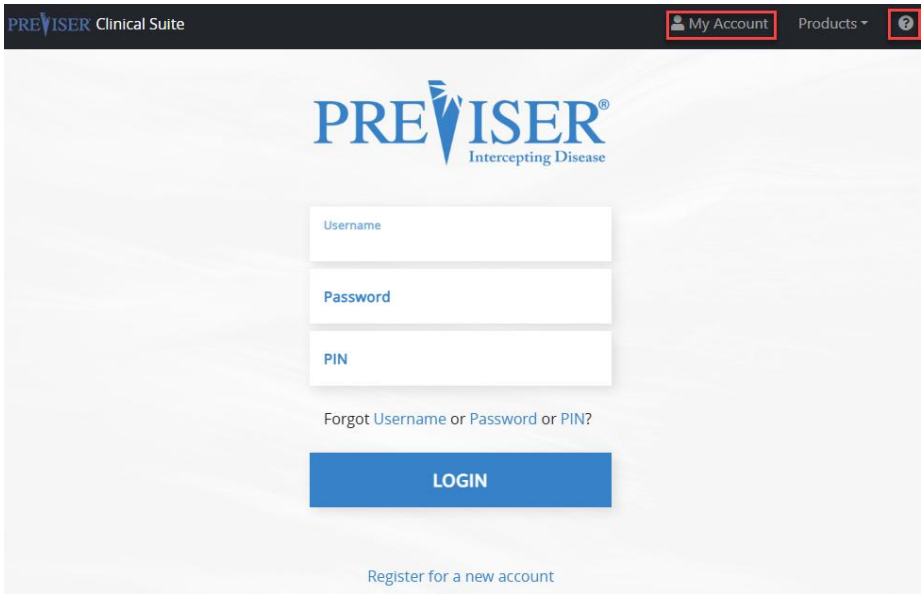
Accessing the Clinical Suite

When you launch the Clinical Suite from https://secure.previser.com/clinical, the log in page displays.

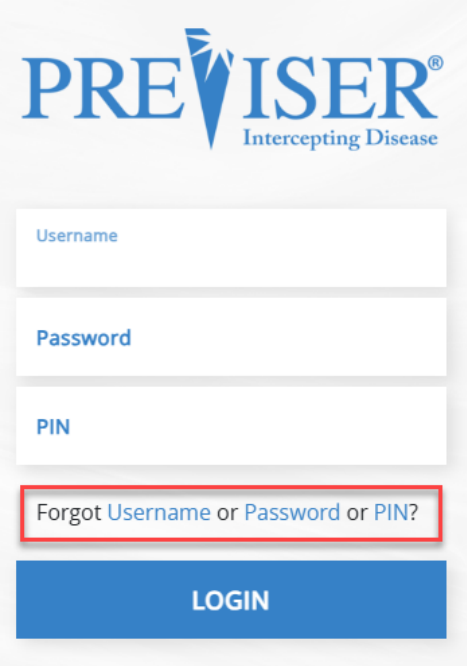
- Clicking on **MyAccount** redirects you to the MyAccount application for account management.
- Clicking on the question mark opens https://www.previser.com/support/ the PreViser Support website with links to documentation, videos, trainer resources, and support contact information.

Enter the **Username**, **Password**, and **PIN** you created when you registered.

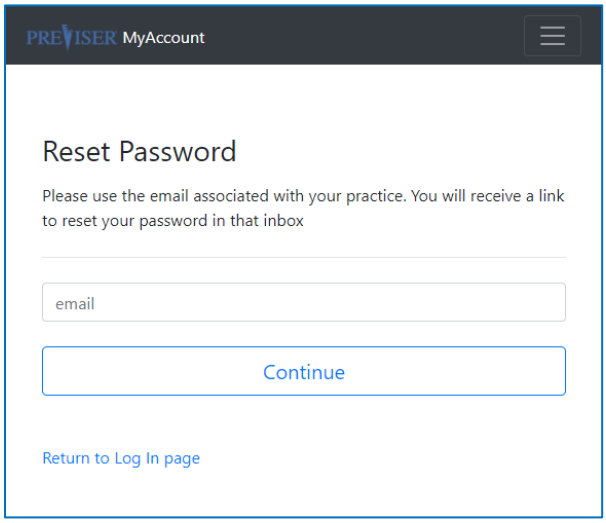
Click **Login** to display the Browse Patients page.

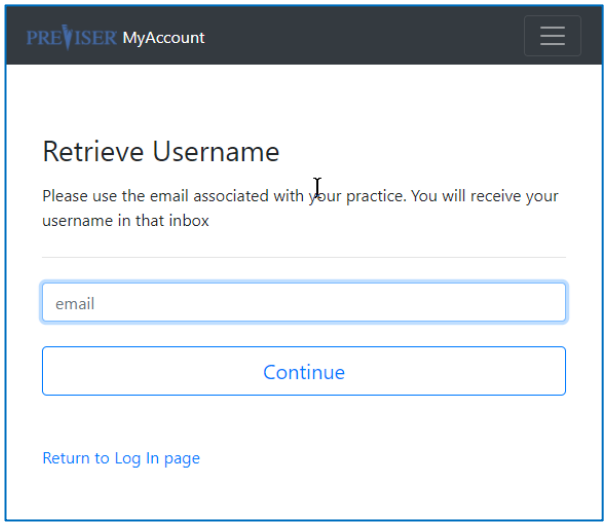


Lost Password, Username, or PIN



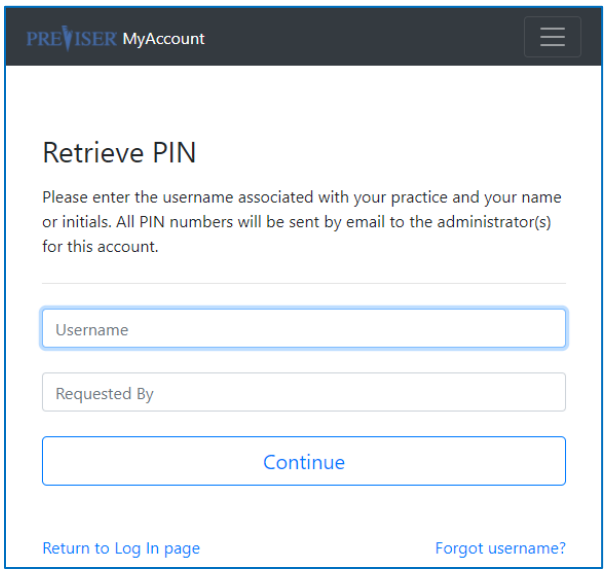
You can reset your password or retrieve your account username by entering the email address associated with your account.





continued

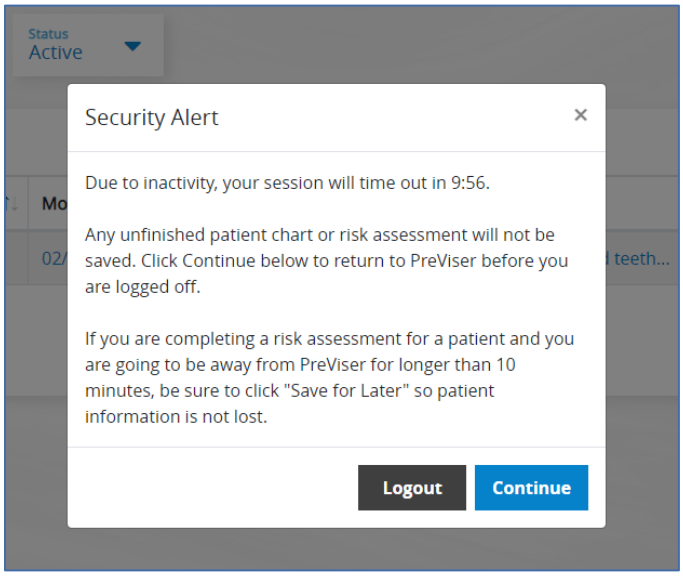
To retrieve a lost PIN, enter the account username and the name of the person asking for the PIN.



TIME OUT FEATURE

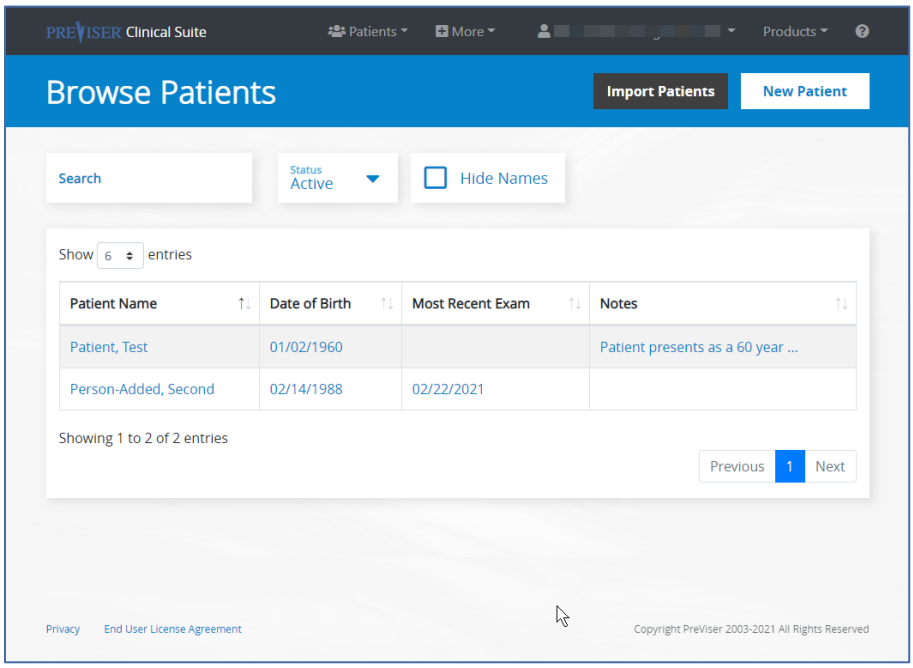
To ensure compliance with HIPAA IT security requirements, users of the PreViser Clinical Suite will see a new pop-up appear after 10 minutes of data entry inactivity. If you do not click the **Continue** button, 10 minutes after that you will be automatically logged off the system.

! If you are automatically logged off***, any unsaved data will be lost*** and will need to be re-entered to complete the assessment. If you believe you are going to be longer than 10 minutes away from data entry, be sure to click **Save for Later** so you do not lose any unsaved clinical data entered.



Using PreViser's Clinical Assessment

Once you are logged in successfully, the Browse Patients Home page displays:



Search Function

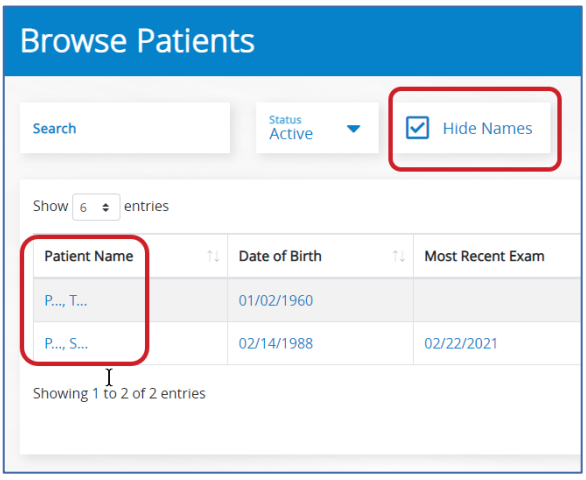
To search by Patient Name or Notes: type a whole or partial word in the Search field. The search filter works immediately as you enter the characters.

To search by Date of Birth: Type the full or part of the birthdate in dd/mm/yyyy format. The search filter works immediately as you enter the characters.

Browse Patients Page Privacy Mode

You can 'hide' patients' names to only show the patients' initials.

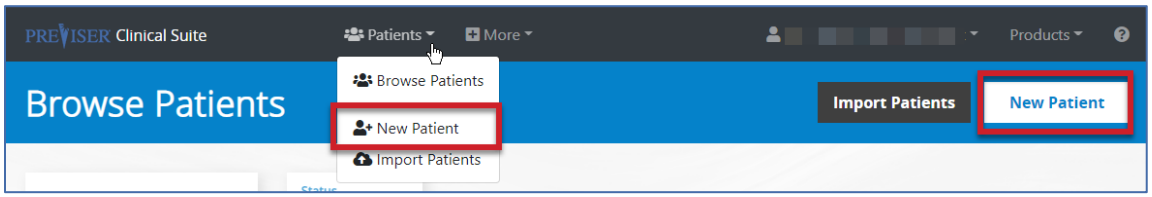
This enhances HIPAA compliance for offices by hiding protected health information if the computer monitor can be viewed by patients.



Creating Patients

In order to assess a patient, a PreViser patient record must be created.

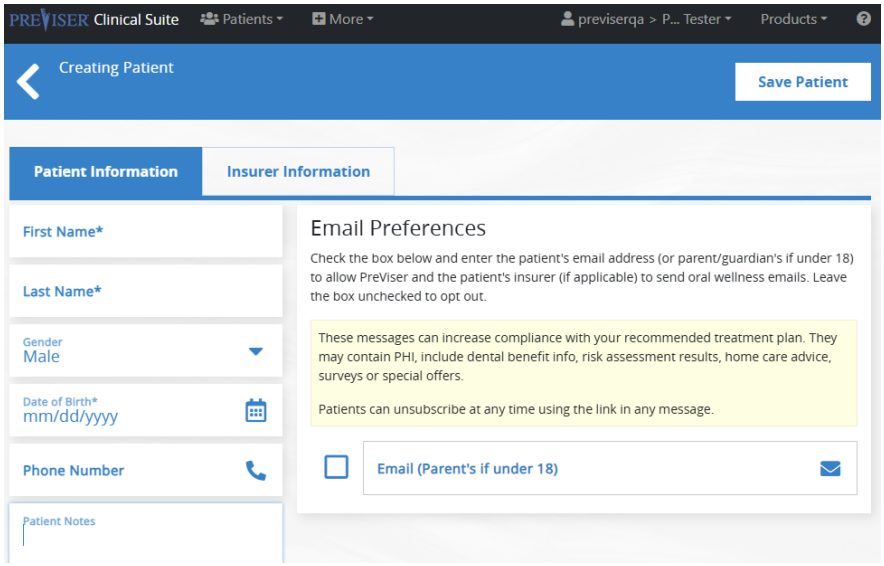
Click the **New Patient** button on the Home Page:



(Another way to do it is to click the **Patients** tab at the top, then click the **New Patient** option.)

The Patient Information page displays.

This page and the Insurer Information page are all you need to create your patient.



continued

Fill in the Patient Information fields:

ⓘ Important! Fields **without** an asterisk are **not** submitted to the insurance carrier, i.e., any notes added to the Patient Notes section are not viewable by the insurance carrier.

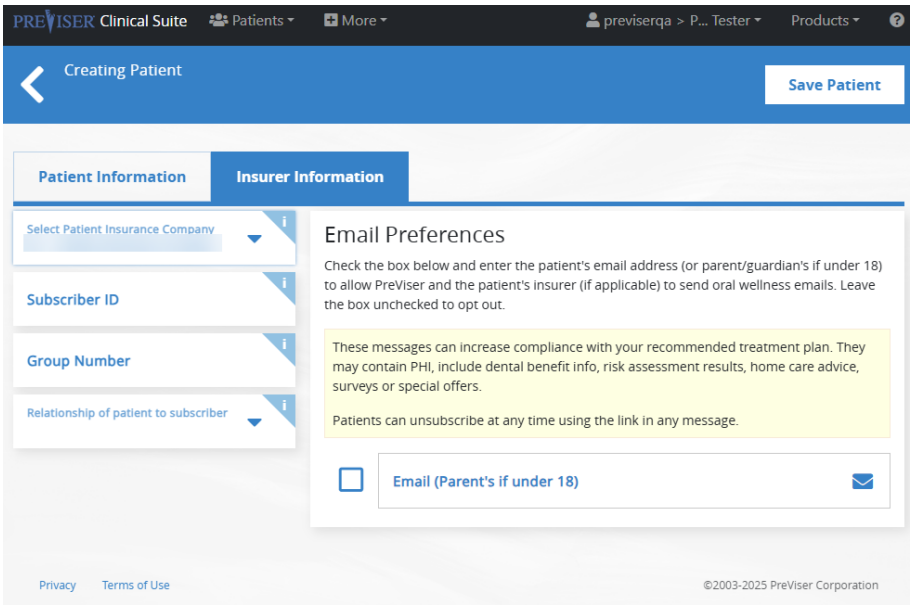
First Name*	Required.
Last Name*	Required.
Gender	Dropdown select Male or Female
Date of Birth*	Required, mm/dd/yyyy format
Phone Number	
Email	Parents if under 18
Patient Notes	

Click the **Insurer Information** tab and select the insurer of that patient from the dropdown list.

Note: The contents of the page will change depending on the company you select.

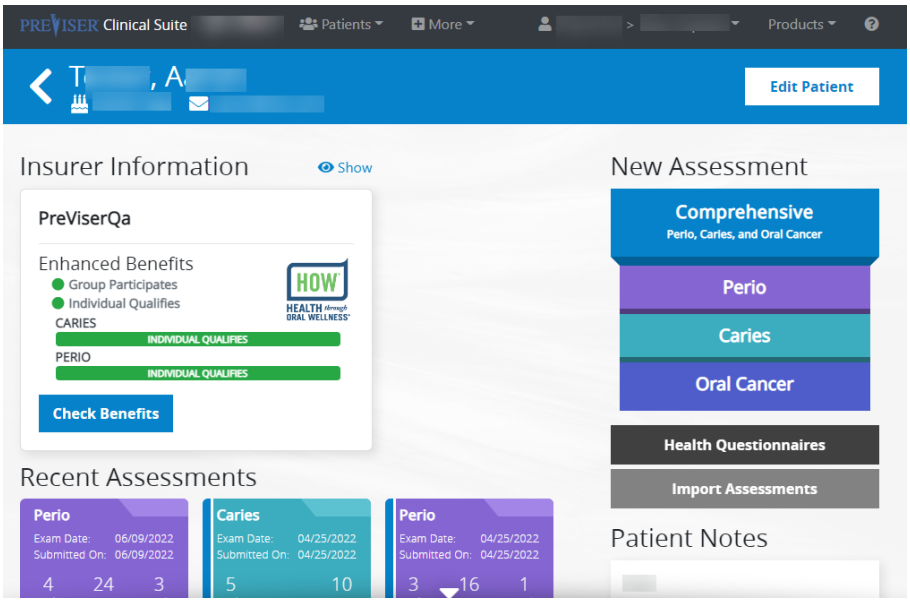
If you do not see the insurer, or if the patient is uninsured, select **None/Other** from the dropdown list.

Click the **Save Patient** button.



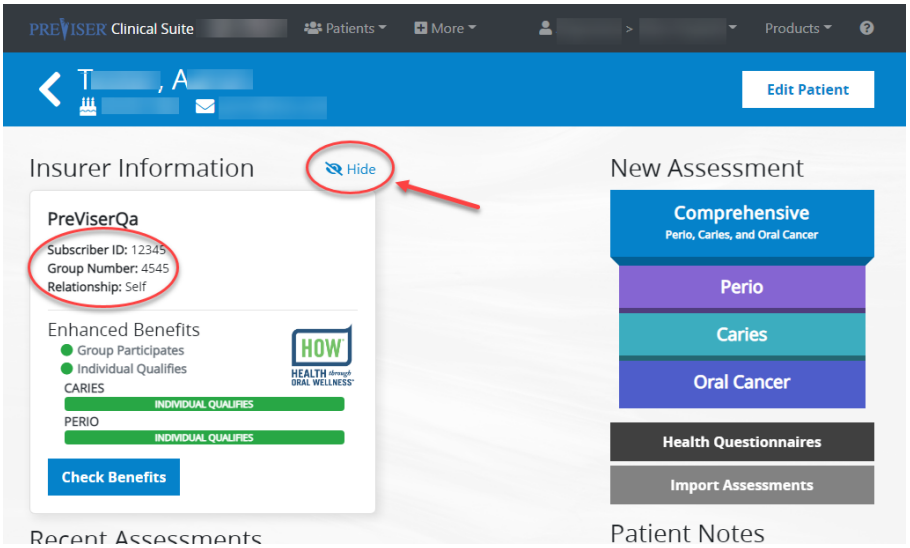
EDIT PATIENT INFORMATION

Once a patient has had assessments performed and you select them on the Browse Patients page, the *Patient Details* page will look similar to this:

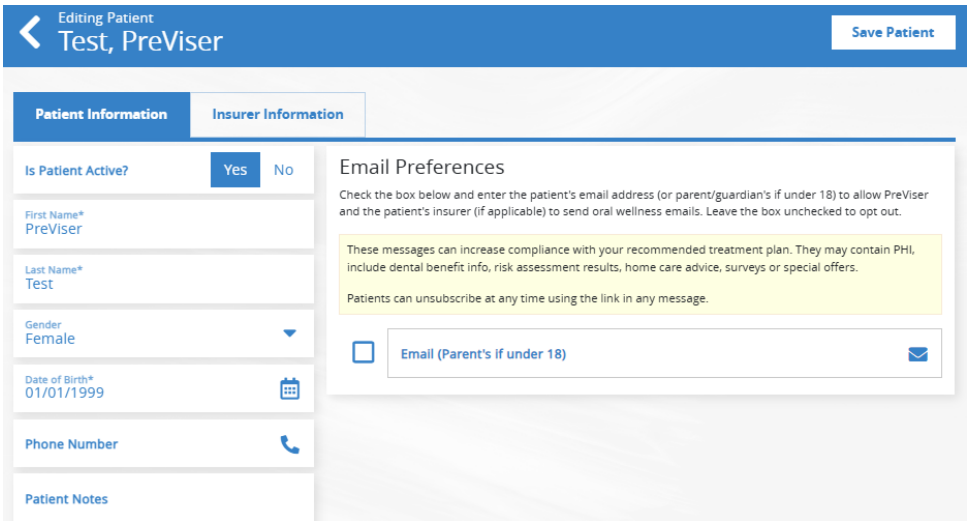


The *Patient Notes* section will only display if notes have been added.

You can choose to hide or display patient data, such as Subscriber Number, Group Number or Relationship, in the *Insurer Information* section on the *Patient* page by clicking on the **Show** / **Hide** icon.

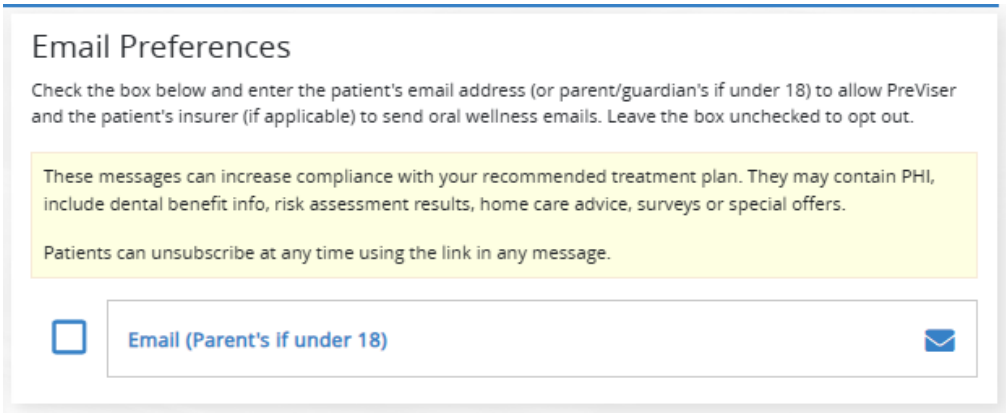


If you need to update the patient's demographic or insurance information, or make them inactive in the Clinical Suite, you can do so by clicking **Edit Patient**, making the update, and clicking **Save**.



Patient Engagement

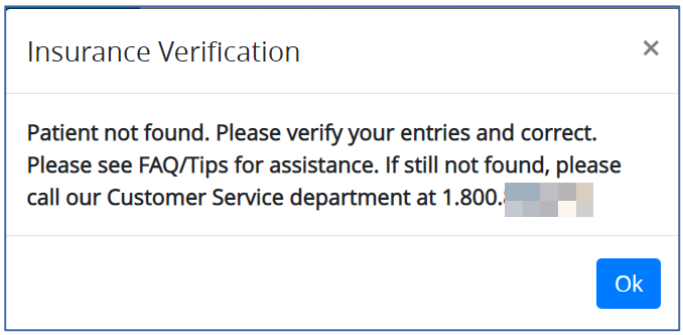
If the provider selects an insurance company from the dropdown list, the provider has an opportunity to collect the patient's email address. This will allow the insurance company to send targeted messages to the patient based on the patient's risk and severity scores. To enable this feature, you must check the box to confirm that the "patient wishes to receive additional information about their oral health," and enter the patient's email address:



Patient Verification

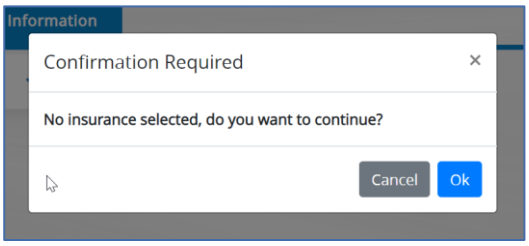
When an insurance company is selected, the Clinical Suite can verify the data that you enter with the information the insurance company has on file, if the insurer has established the necessary connection to the Clinical Suite. This can vary from one insurance company to another.

If you enter information that does not match that which is in the insurance company's records, a message will display with information about what to do next:



Once the patient details page has been populated, click **Save.**

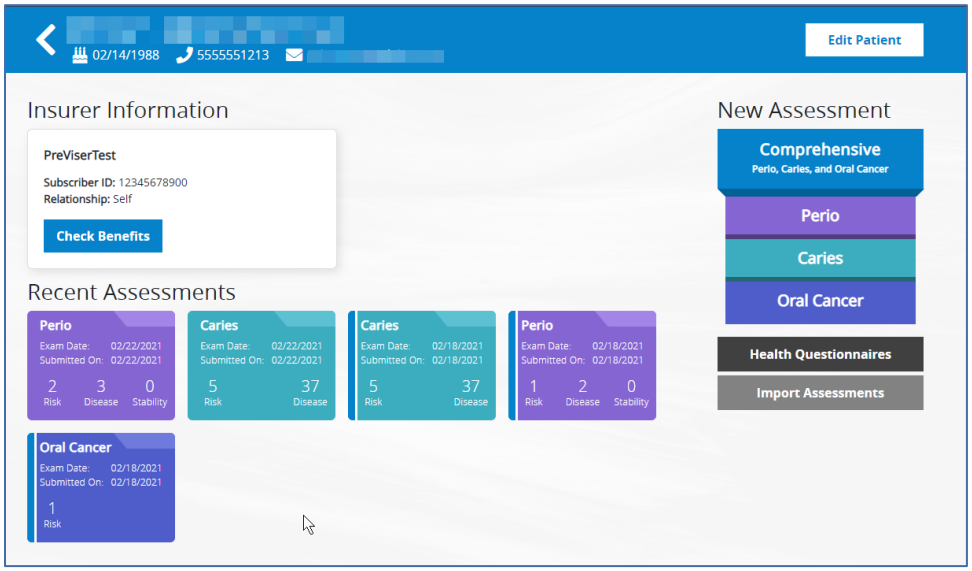
If you selected **None/Other** for the insurance status, you will be prompted to verify the patient is uninsured:



Once you confirm this status, an alert message will confirm that your patient was created successfully and saved

Overall Assessment Information

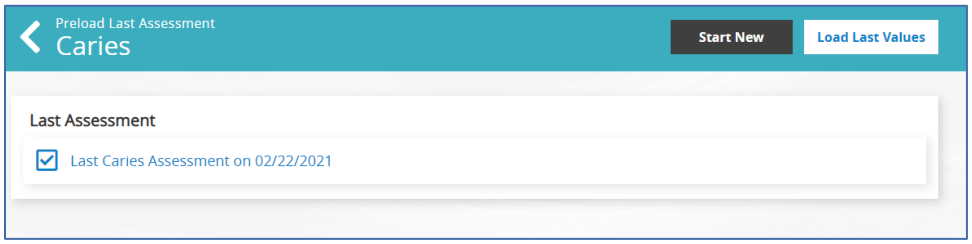
Select a patient you created and click one of the New Assessment choices on the Patient Details page to open and start a new **Comprehensive, Periodontal**, **Caries**, or **Oral Cancer** Assessment:



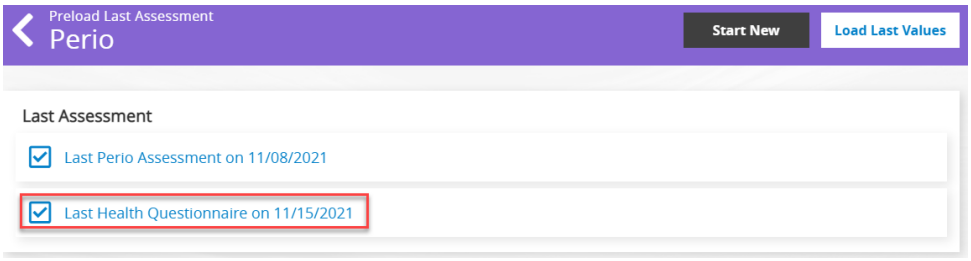
Pre-loading Values from Prior Assessments

After the first risk/restorative needs assessment has been done for any of the assessment types, the Clinical Suite allows you to pre-load previously entered values from a previous assessment.

In the example above, two recent Caries assessments are shown. When you click on **Caries** under New Assessment, you are given the option of starting a completely new assessment or loading the most recent values so you can update them:



If a Health Questionnaire has been completed for the given patient, it can be also selected to prepopulate the assessment answers.



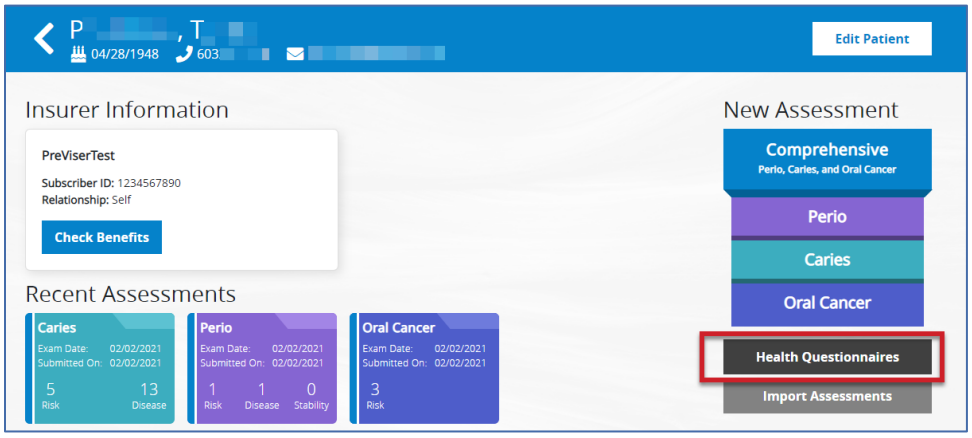
This saves time as it allows you to only address clinical conditions that have changed since the last assessment.

None of the assessment answers will be prepopulated if the *Last Assessment* and *Last Health Questionnaire* check boxes are unchecked, or if the Start **New button** is clicked.

HEALTH QUESTIONNAIRES

A health questionnaire contains assessment questions the patients can fill out themselves before being assessed by the clinician. This saves time and allows patients to be more interactive with their own oral health.

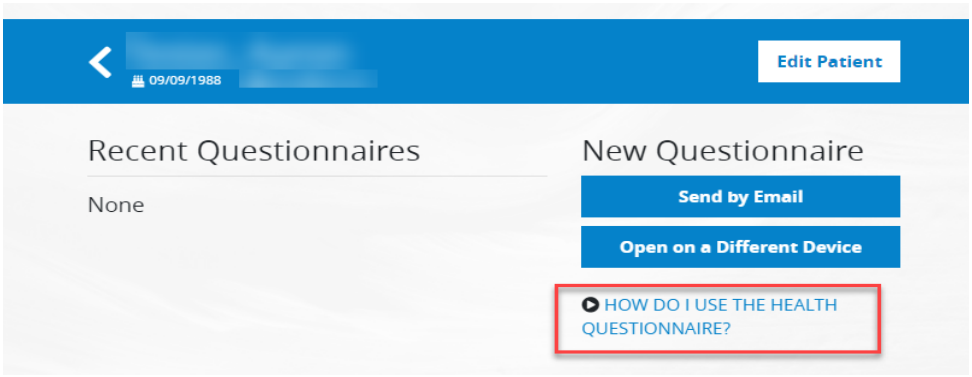
To create a health Questionnaire, or view the existing questionnaires, first select a patient from the patient list, view the *Patient Details* page and click the **Health Questionnaires** button:



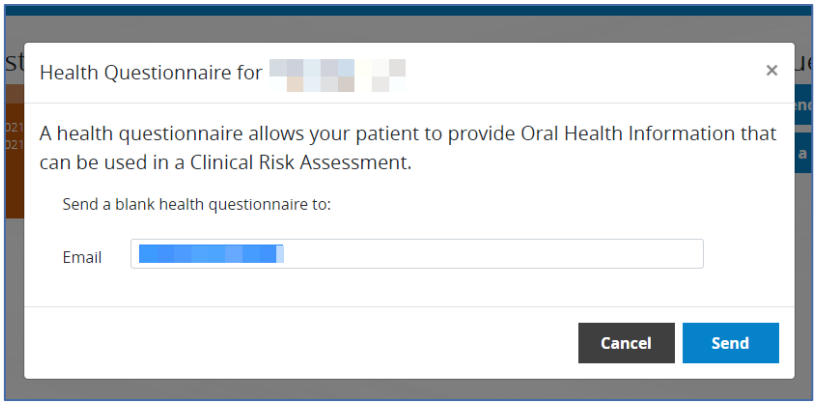
The *Health Questionnaires* page is displayed.

You can click on the

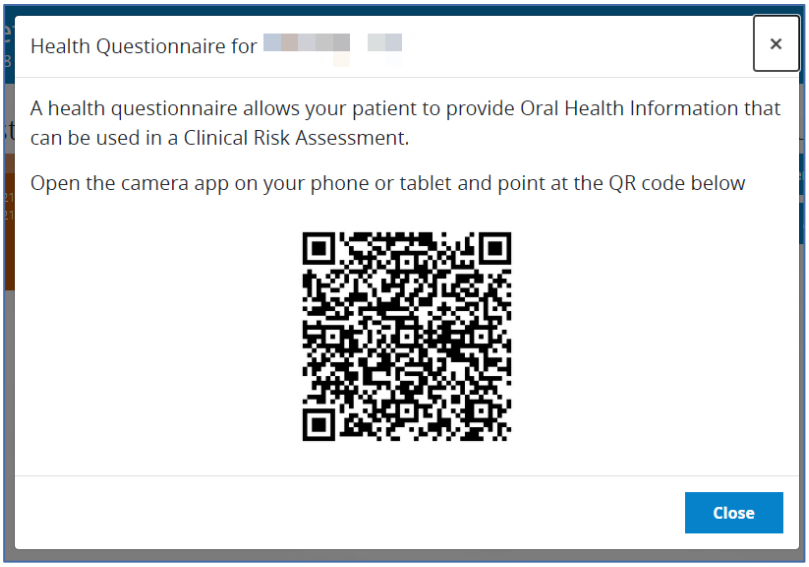
HOW DO I USE THE HEALTH QUESTIONNAIRE? link to view a video explaining how to use it.



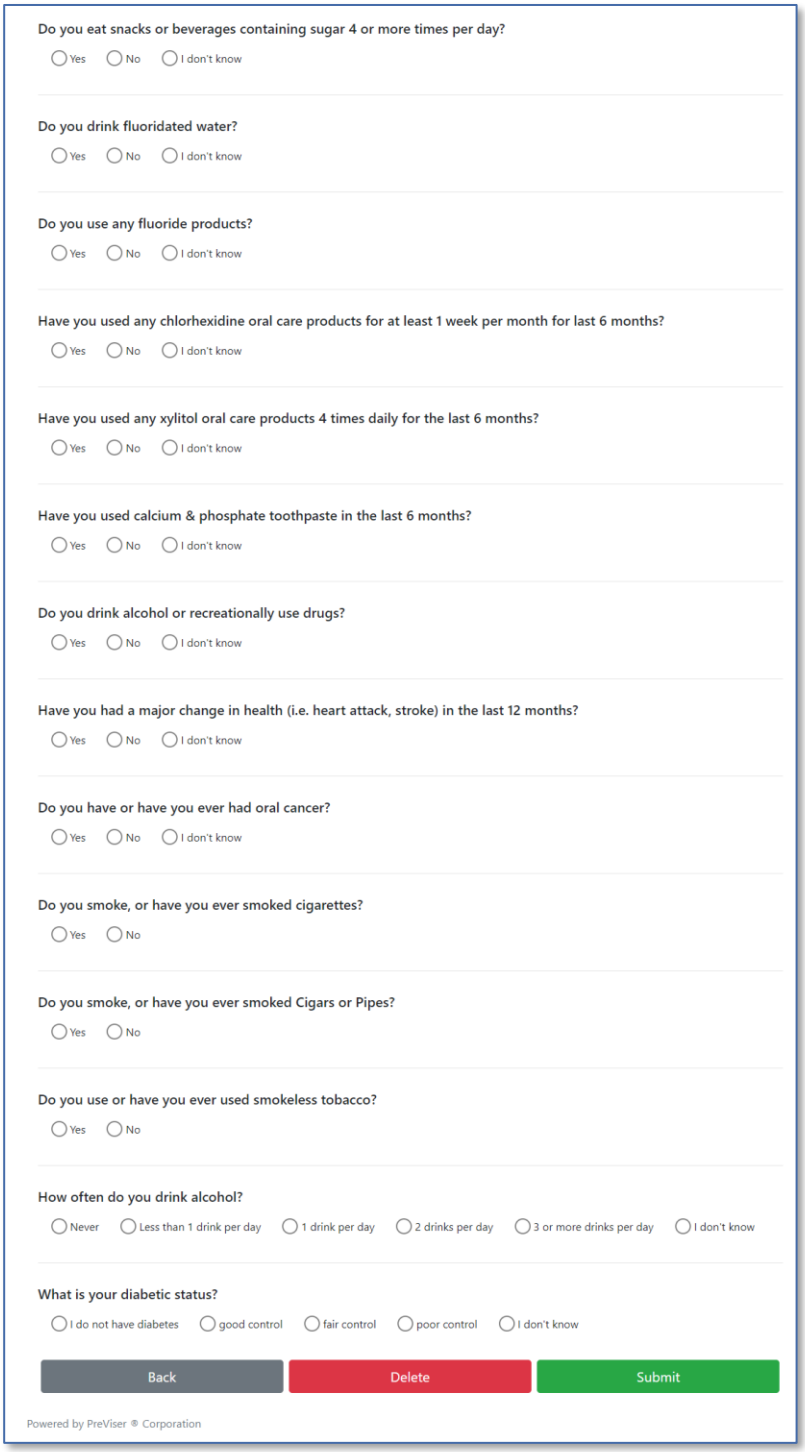
You can email the Health Questionnaire the week, day, or any time before the patient's appointment in order to make the chair-side experience quicker and more productive.



Patients can also scan the Quick Response code with their smart phone or tablet to access the Health Questionnaire.



Sample questionnaire



Do you eat snacks or beverages containing sugar 4 or more times per day?
Yes No I don't know

Do you drink fluoridated water?
Yes No I don't know

Do you use any fluoride products?
Yes No I don't know

Have you used any chlorhexidine oral care products for at least 1 week per month for last 6 months?
Yes No I don't know

Have you used any xylitol oral care products 4 times daily for the last 6 months?
Yes No I don't know

Have you used calcium & phosphate toothpaste in the last 6 months?
Yes No I don't know

Do you drink alcohol or recreationally use drugs?
Yes No I don't know

Have you had a major change in health (i.e. heart attack, stroke) in the last 12 months?
Yes No I don't know

Do you have or have you ever had oral cancer?
Yes No I don't know

Do you smoke, or have you ever smoked cigarettes?
Yes No

Do you smoke, or have you ever smoked Cigars or Pipes?
Yes No

Do you use or have you ever used smokeless tobacco?
Yes No

How often do you drink alcohol?
Never Less than 1 drink per day 1 drink per day 2 drinks per day 3 or more drinks per day I don't know

What is your diabetic status?
I do not have diabetes good control fair control poor control I don't know

Back Delete Submit

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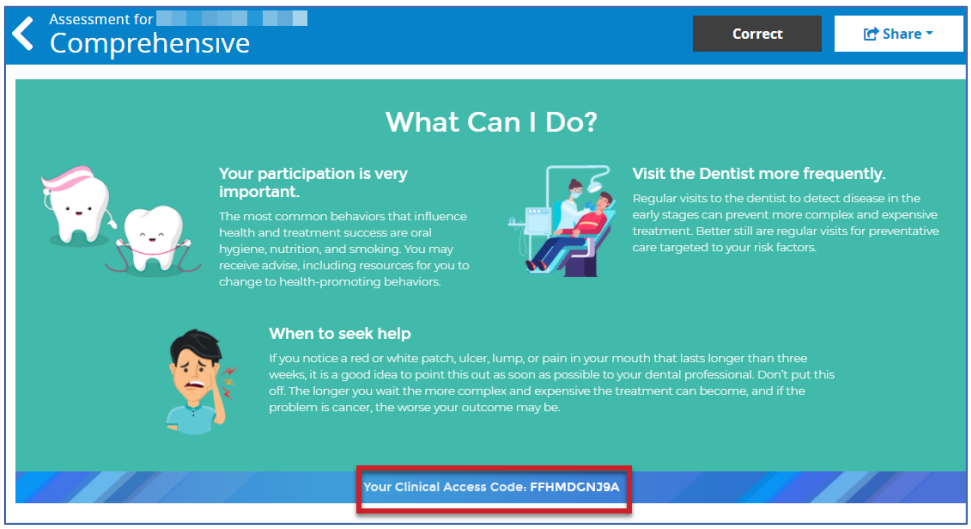
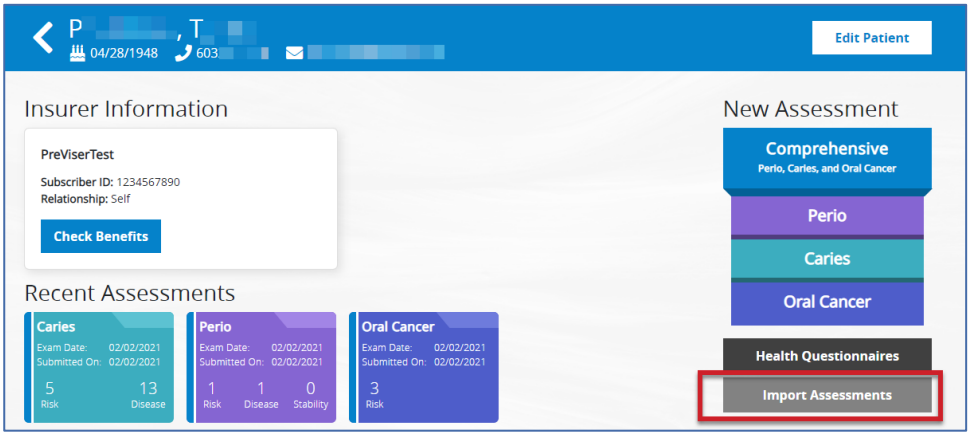
Importing Assessments from Other Practices

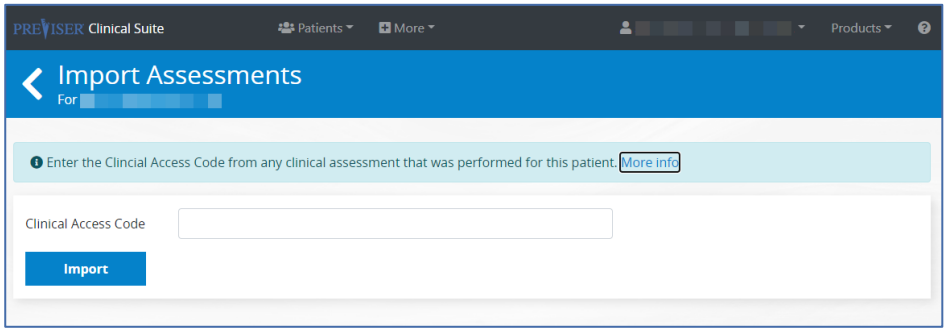
If a new patient comes to your practice from an office that uses PreViser and has performed PreViser assessments in the past, you are able to use that previous data. You can ask that patient to bring in an old report or you can reach out to the patient's former dental provider and ask for the Clinical Access Code which is located below the "What Can I Do?" section of any of that patient's reports.



Once you receive that access code, click **Import Assessments** on the patient page:

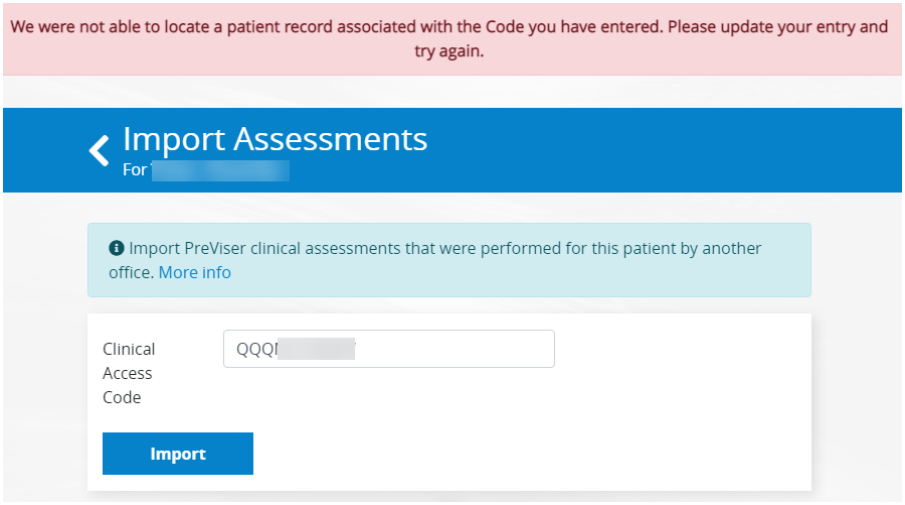


Type in or copy/paste the Clinical Access Code and click **Import**.

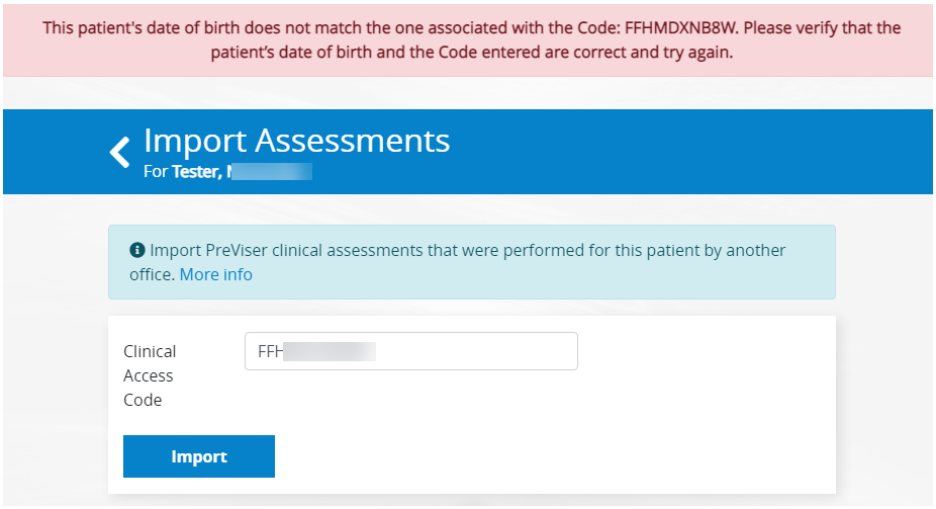


The top of the following page should display how many assessments imported successfully:

NOTE: If the assessment code has been entered incorrectly, or is invalid, the following error message will be displayed:

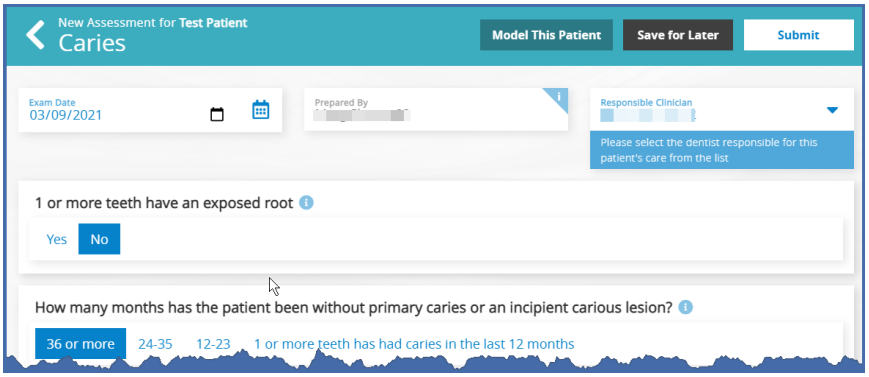


The patient birth date and is also confirmed when an assessment is being imported. If it is different than that of the patient the assessment was originally entered for, the following message is displayed:



PERFORMING AN ASSESSMENT

If any of the assessments are selected (Caries is used as the example below) and you begin the assessment, the following page displays:



Exam Date

The date the assessment was performed. The current date is the default. Generally, this is going to be within a day or so of when the assessment data is entered. However, clinicians may wish to create a record of the patient's PreViser scores by entering data from prior examinations. You can adjust the exam date to reflect the prior dates with corresponding clinical information for those dates.

***Note:** if the exam date is more than 90 days in the past for a finished assessment, the Correct function is disabled.*

Prepared By

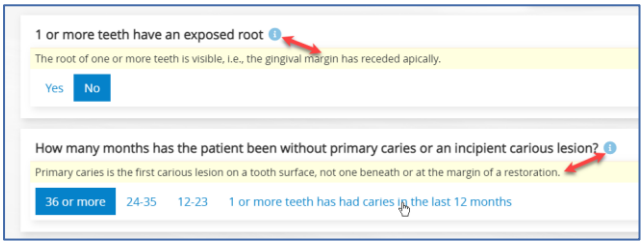
The person who is performing the assessment. Will match the clinician logged in to the Clinical Suite with their PIN.

Responsible Clinician

This is the clinician who is ultimately responsible for the care of the patient, typically a dentist or independent practicing hygienist.

Contextual help for all clinical assessment questions

Select the 'i' icon next to the questions for additional clarification.



Submit

When selected, the data you have recorded will be submitted to the PreViser web service and a patient report will be returned, including the Report Settings you selected. If an insurance company has been entered and successfully saved, the scores will also be sent to the patient's dental insurance company.

Save for Later

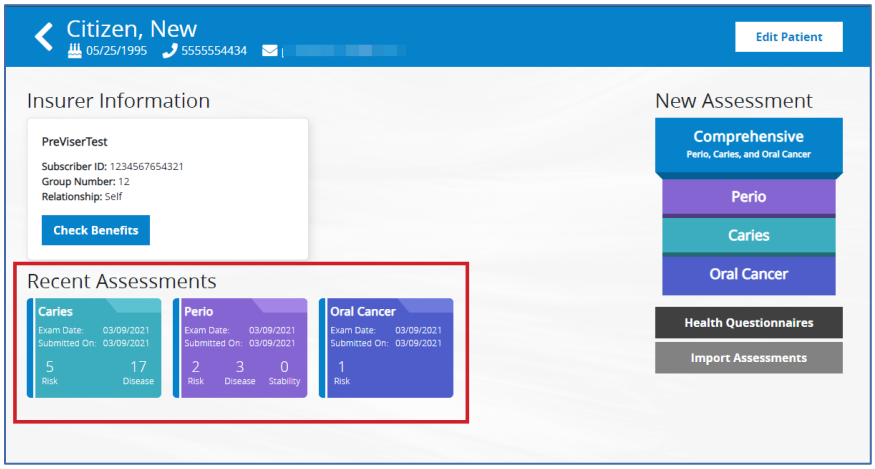
This option allows the unfinished assessment to be saved without submitting and for the clinician to come back to finish at a later time.

Model this Patient

This is a hypothetical option. When selected, the assessment is not saved. This is a tool you may use to demonstrate to patients what they can do to improve their scores.

Recent Assessments

Once a patient has been assessed and you return to the patient page for that person, a new section will appear on this page that shows all prior assessments. Example:



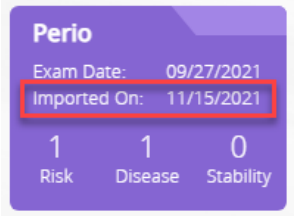
The type, date, and scores for the assessment are shown, where:

Risk = the risk of the patient for the disease type; and

Disease = the restorative needs or periodontal disease severity scores;

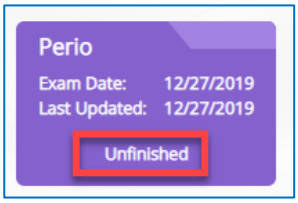
Stability (perio only) = is the periodontal disease stability score for the patient.

If the assessment was **imported**, the imported date will be indicated on the assessment:

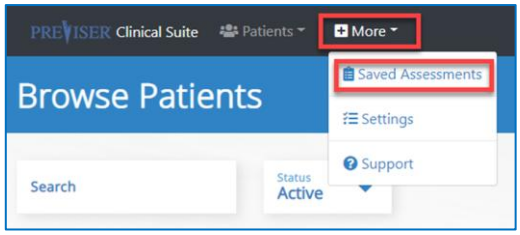


Where **Unfinished** appears instead of scores, this will be an assessment that was not completed but saved to complete later.

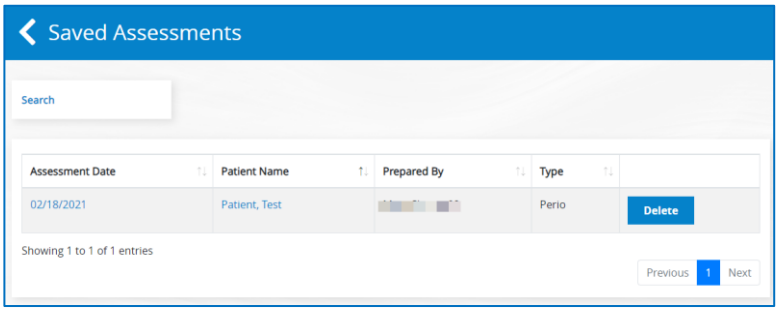
Note: *If you select to* ***Model This Patient****, the assessment will not appear in this section because modeled assessments are not recorded in the PreViser database and disappear once you close the modeled patient report.*



Accessed through the top navigation bar, the **Saved Assessments** link gives access to all assessments you selected to **Save for Later** rather than Modeling or Submitting the assessment.



Example:

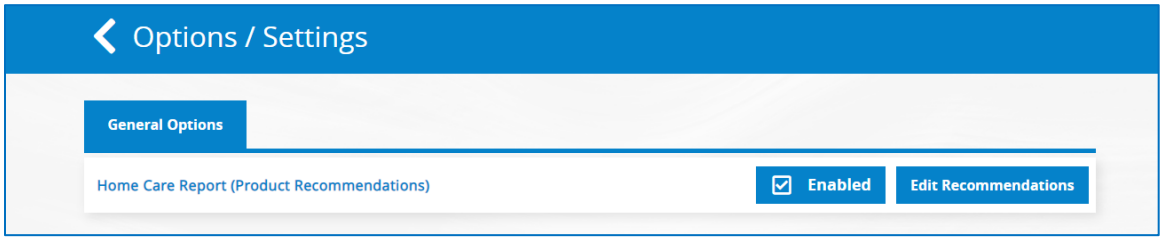


Click **Assessment Date** to display the data input page for the unfinished assessment. You can then provide the missing information before submitting the assessment by clicking **Submit**. Alternately, you can delete the unfinished assessment by clicking the **Delete** button.

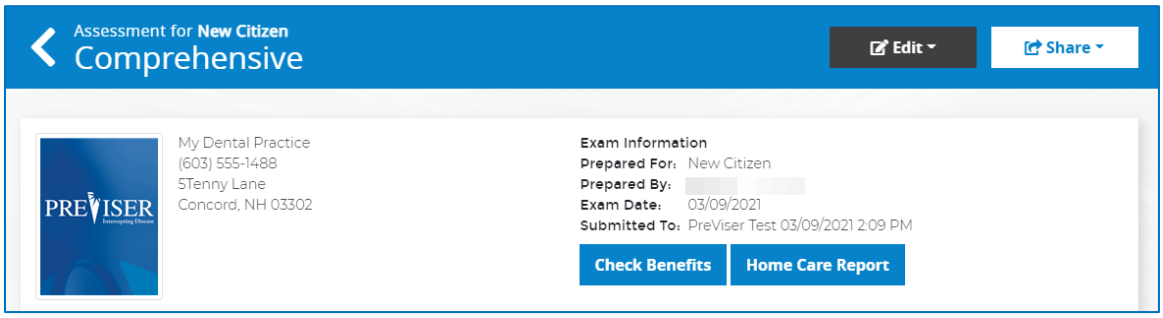
HOME CARE REPORT (HCR)

OVERVIEW

Professional recommendations for self-care and home care products are a critical component in optimizing patient oral health outcomes. If your Settings have the **Enabled** button checked for the Home Care Report, your Caries, Perio and Comprehensive assessments will display a **Home Care Report** button.



Click the **Home Care Report** button at the top of assessments to display home health care product recommendations. These are personalized oral care products based on the patients' risk and disease scores.



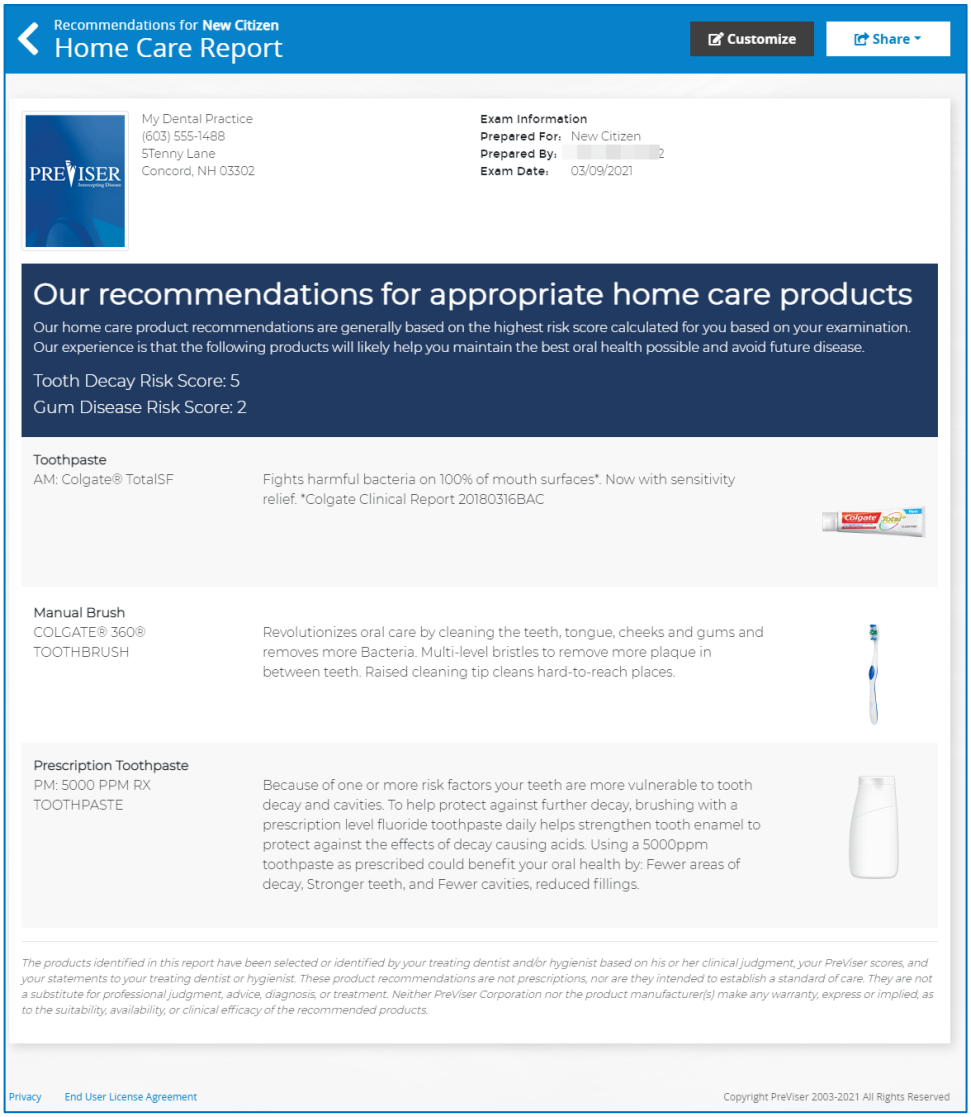
Recommendations that are automatically made when both perio and caries risk scores are present use the following logic:

- Whatever the highest risk is, use the recommendations for that risk category.
- If both perio and caries risk scores are the same value, use the caries risk product recommendations.

For the initial launch of the Home Care Report, PreViser collaborated with Colgate, who provided images and text to go along with the products that they believe you might consider for a given risk and product category.

However, you are free to recommend any alternative product you think best for your patients.

Click the **Customize** button to further customize care plans.

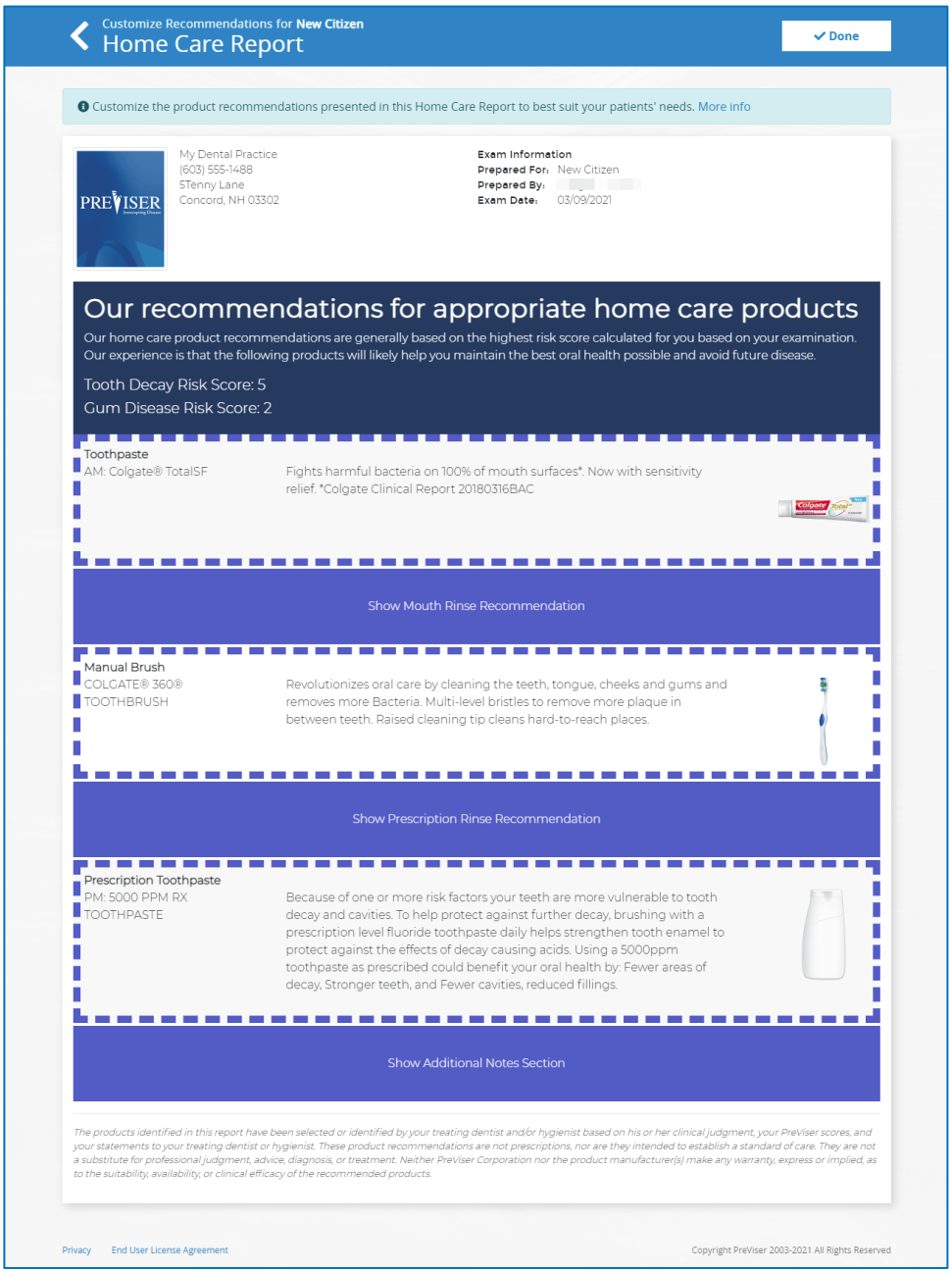


EDITING AN INDIVIDUAL HOME CARE REPORT

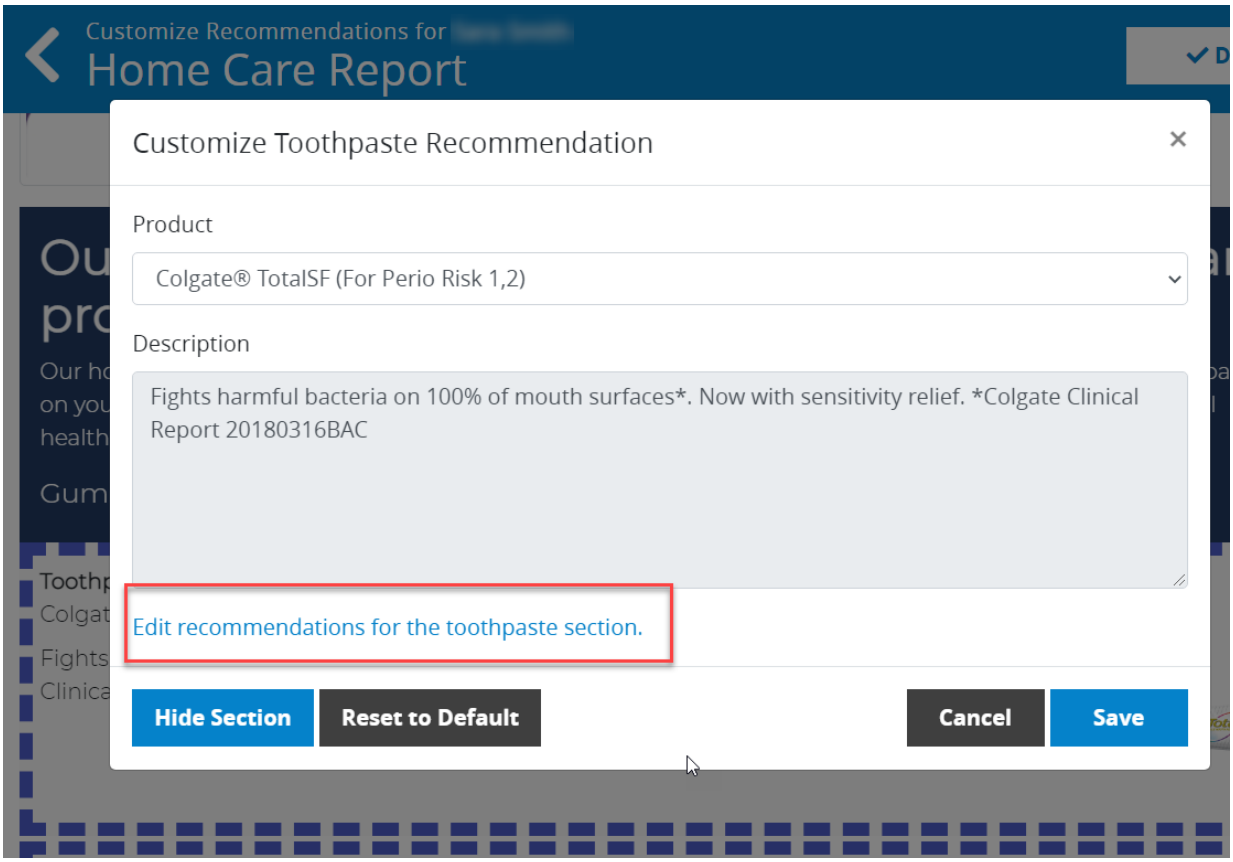
When you click the **Customize** button, the Home Care Report can be changed according to your wishes.

The areas inside the purple dotted lines are areas that already appear on the report and can be customized or hidden.

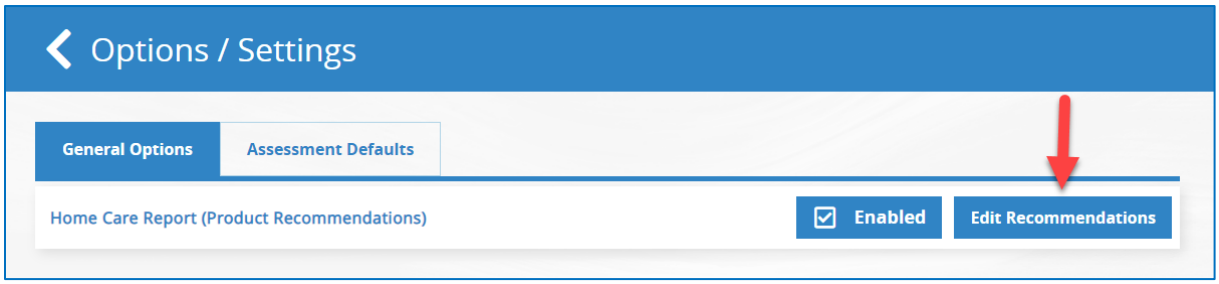
The areas that display “Show …” can be added and customized.



Changes to a specific patient's report will be tracked only with that patient's associated risk assessment. However, if the logged in user is designated as an Admin of the account, they can change the default product recommendations for all Home Care Reports in the Settings menu.

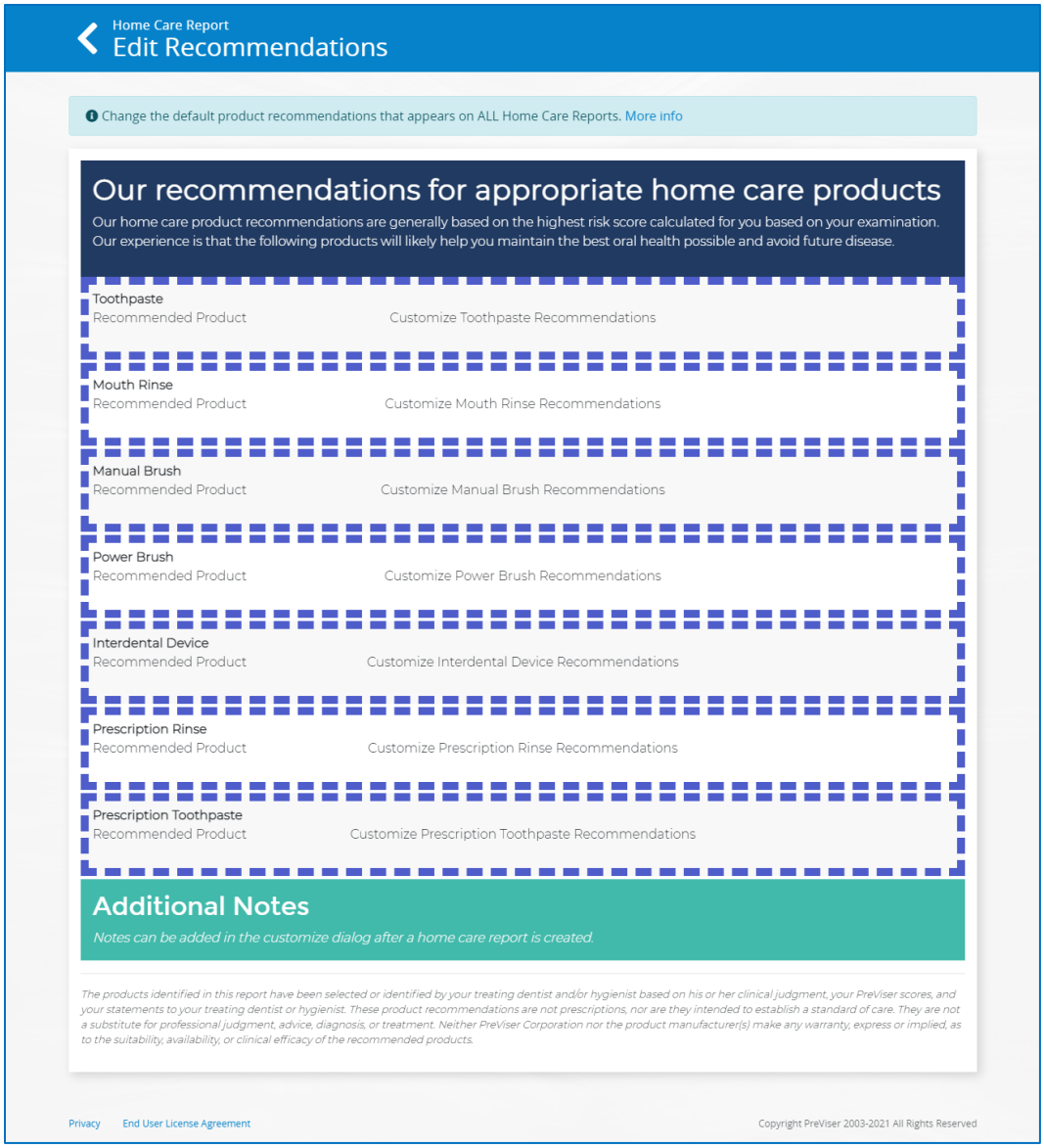


Alternatively, the user can browse to *More > Settings* and click on the **Edit Recommendations** button:



EDITING HOME CARE REPORTS FOR THE ENTIRE PRACTICE

When **Edit Recommendations** is selected, the following screen will display:

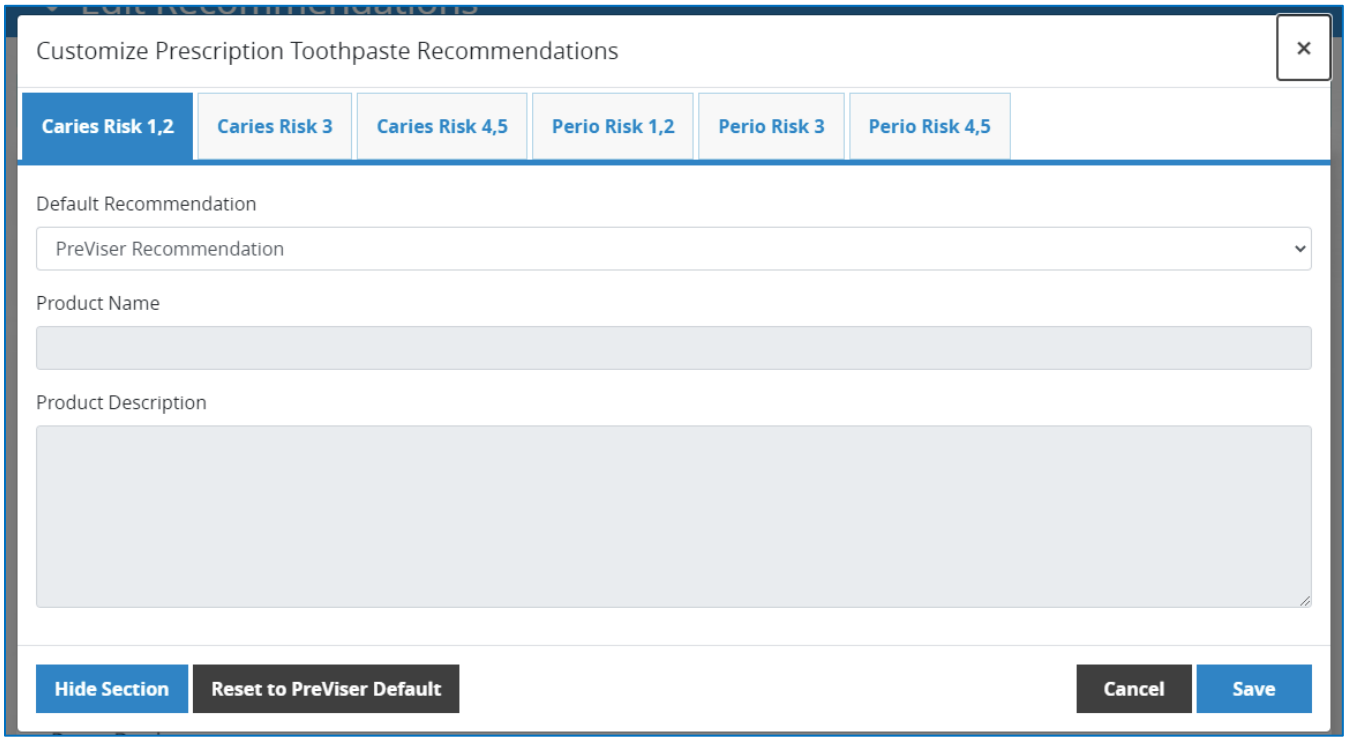


There are seven different product categories you can hide or optionally suggest as beneficial for a given risk category – Toothpaste, Mouth Rinse, Manual Toothbrush, Power Toothbrush, Interdental Device, Prescription Mouth Rinse, and Prescription Toothpaste

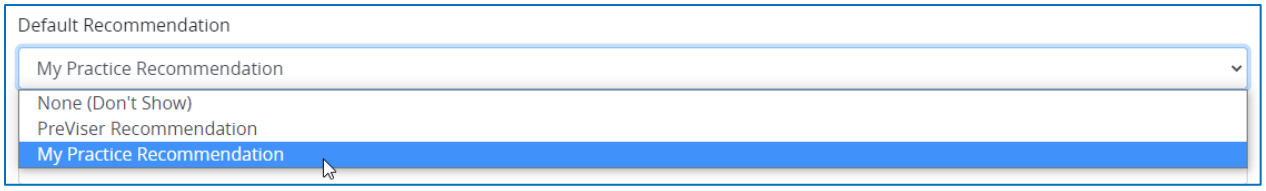
Click anywhere inside the purple dotted lines to make the appropriate changes.

Inside the different product categories, you have the option of making product recommendations for six risk categories –

caries risk 1 or 2 (very low and low),
caries risk 3 (moderate),
caries risk 4 or 5 (high and very high),
perio risk 1 or 2 (very low and low),
perio risk 3 (moderate),
perio risk 4 or 5 (high and very high).



At the top of this page, you'll see the different risk categories arranged as tabs on the page. You can alter the recommendation for a risk and product category by selecting **My Practice Recommendations** from the dropdown menu.



Within each risk category are the seven product categories that allow you to manage in one of three ways:

Hide Section removes the section completely.

Reset to PreViser Default returns to the recommendation Colgate has made for the products they believe are appropriate for the risk category.

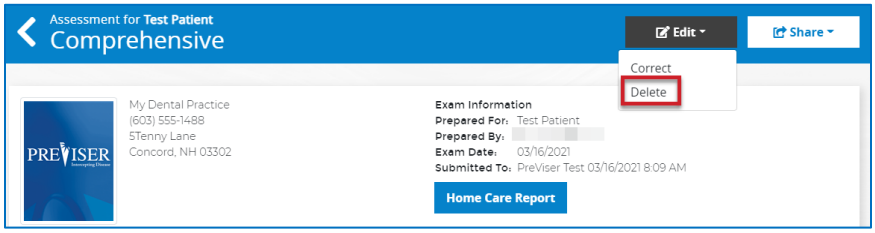
Cancel closes the page without saving any changes.

You can also customize a **Product Description**.

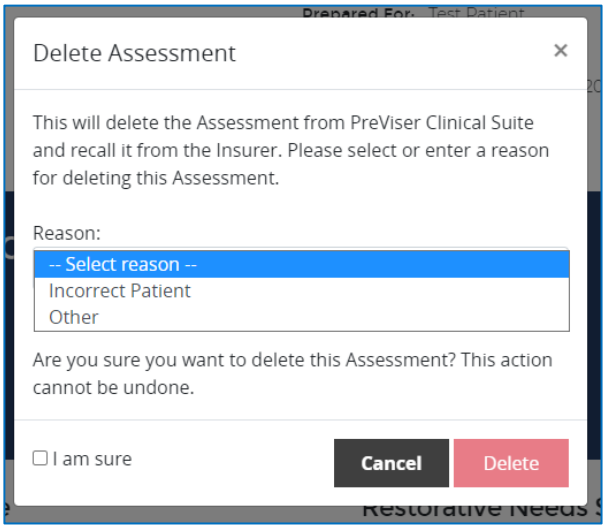
Deleting Assessments

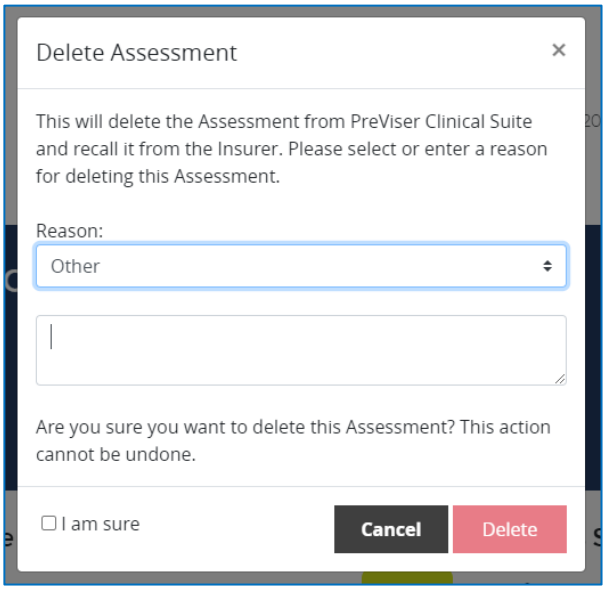
An assessment may be permanently deleted by clicking the *Delete* menu entry of an assessment.

Caution: This action cannot be undone.



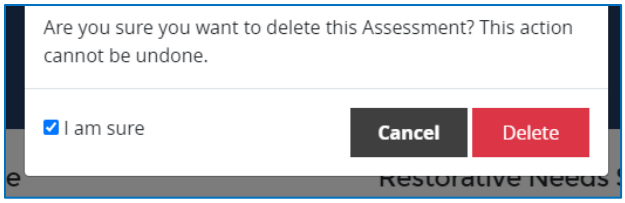
A reason for deleting an assessment must be provided. Select either **Incorrect Patient** or **Other**.





If you select **Other**, a text box where you can supply your own explanation opens.

Enter the reason for the deletion, check the **I am sure** box to enable the Delete button.



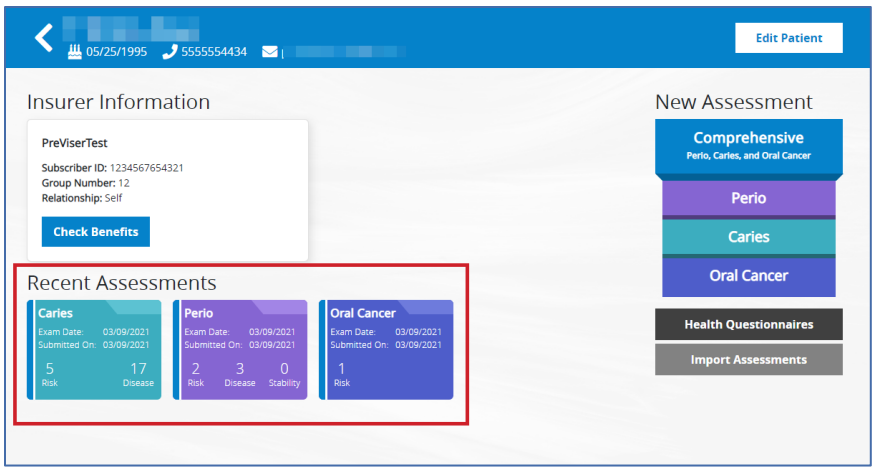
Click the **Delete** button.

If the patient has the Insurer selected, a notification will be sent to the insurer that the assessment was deleted.

Note*: Assessments can be deleted within 90 days of the submission.*

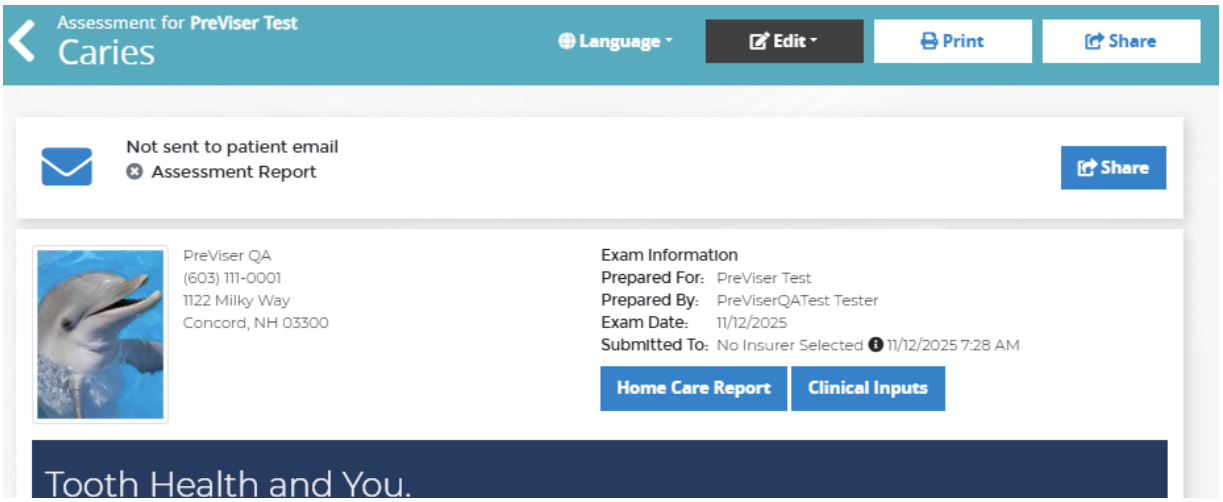
Report Overview

After assessments have been performed, clinicians are able to view the reports anytime, whether the assessment was just performed or is an older one selected from the **Recent Assessments** list on the *Patient Details* page.

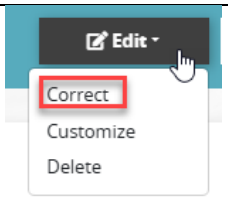
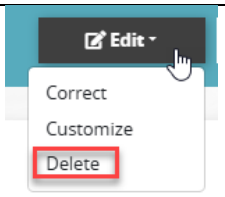
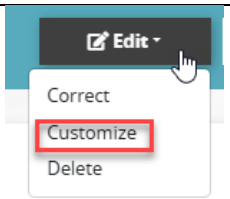
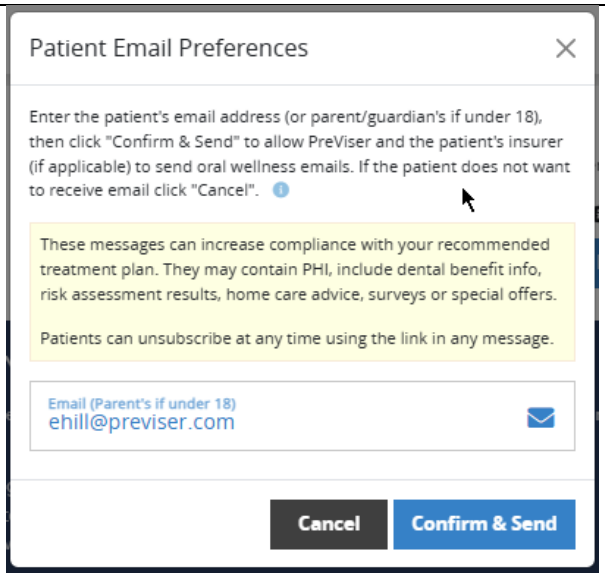


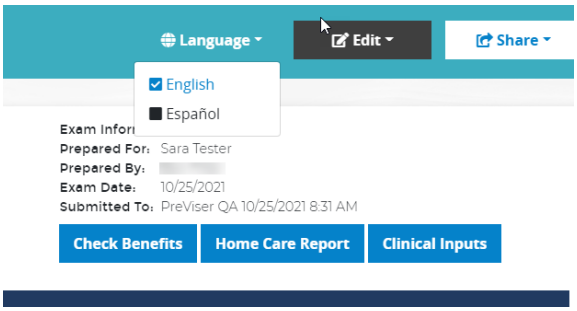
Assessment Report Header

The top of the report includes the assessment type (Caries is used as the example below) and name of the patient as well as other information and functionality:

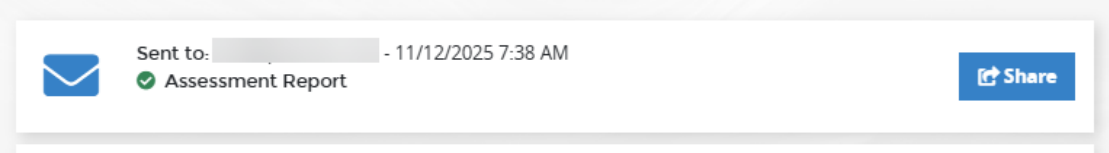


	Click this link at the top of the report to return to the Patient Details page for the patient being assessed.
Your Image	An image meeting specifications (refer to the Picture/Logo section of the MyAccount document) will display on the patient report. Generally, this will be an image of the dentist, staff, or the office.

Edit/Correct	To correct an error made while entering the clinical observations, click **Edit** then click **Correct** to return to the form and make your changes. Click **Submit** to resubmit the assessment. A corrected report will replace the incorrect one when the data is sent to an insurance company for oral health communication or benefit determination.	
Edit/Delete	Assessments dated less than 90 days in the past can be deleted by clicking on the *Edit > Delete* link. **NOTE**: the insurance company the given patient is associated with can opt out of this functionality.	
Edit/Customize	Each individual assessment report can be customized by the clinician by clinking on the *Edit > Customize* link.	
Print	Click **Print** to direct the report to a printer.	
Share	Click **Share**, then click **Email**, then **Confirm and Send** to email reports to patients. ***Note:*** *The email address defaults to the one on file for the currently selected patient. You can type over the default address to direct it to another address.*	

Language drop-down	Click on the Language drop-down to select the language. Available choices are English and Spanish. The language selection is available for all the PreViser assessment kinds.	

Email Status Banner



The Email Status banner contains information about the report being emailed to the patient. Click the Share button to email the report to the patient. The **Sent to:** line contains the last email address and time the assessment was emailed.

Clinical Inputs

After you have completed a risk assessment, the Clinical Inputs can be displayed in full, easily accessed, and printed. This is a simple, but effective way to evaluate the oral health data of your patients and calibrate clinical input from clinicians.

Clinical Inputs can be also printed by clicking the **Print** button.

Responses for **PreViser Test**
Clinical Inputs

Print

PreViser QA
(603) 111-0001
1122 Milky Way
Concord, NH 03300

Exam Information
Prepared For: PreViser Test
Prepared By: sg
Exam Date: 01/01/3000

Caries Assessment Responses

Teeth

1 or more teeth have an exposed root	[No]
How many months has the patient been without primary caries or an incipient carious lesion?	[36 or more]
Bacteria culture includes elevated MS and/or LB level?	[No culture or test is available]
How many erupted teeth are present in the oral cavity?	[28 or more]
How many natural teeth have any type of restoration, including crowns and veneers?	[0 (None)]
How many natural teeth currently require treatment because of caries or a defective restoration?	[0 (None)]
How many natural teeth have primary caries or an incipient caries lesion?	[0 (None)]

Clinical Conditions

Oral hygiene improvement is needed	[No]
Dry mouth or inadequate saliva flow	[No]

Treatment History and Considerations

Dental care frequency is NOT as regular as advised	[No]
Development problems or special health care needs	[No]
Teeth have been extracted due to caries in last 36 months	[No]
Fluoride varnish applied in last 6 months	[No]
Has orthodontic appliance, space maintainer, or obturator	[No]

Questions the patient can answer

Snacks or beverages containing sugar are consumed between meals 4 or more times per day	[No]
Patient drinks fluoridated water	[Yes]
Nonprescription or prescription fluoride products other than water are used	[No]
Chlorhexidine used for at least 1 week per month for last 6 months	[No]
Xylitol products have been used 4 times daily for last 6 months	[No]
Calcium & phosphate toothpaste have been used during last 6 months	[No]
Recreational drug/alcohol use	[No]
Has had a major change in health (heart attack, stroke, etc.) during the past 12 months	[No]

Vaping Use

Currently uses vaping products	[No]

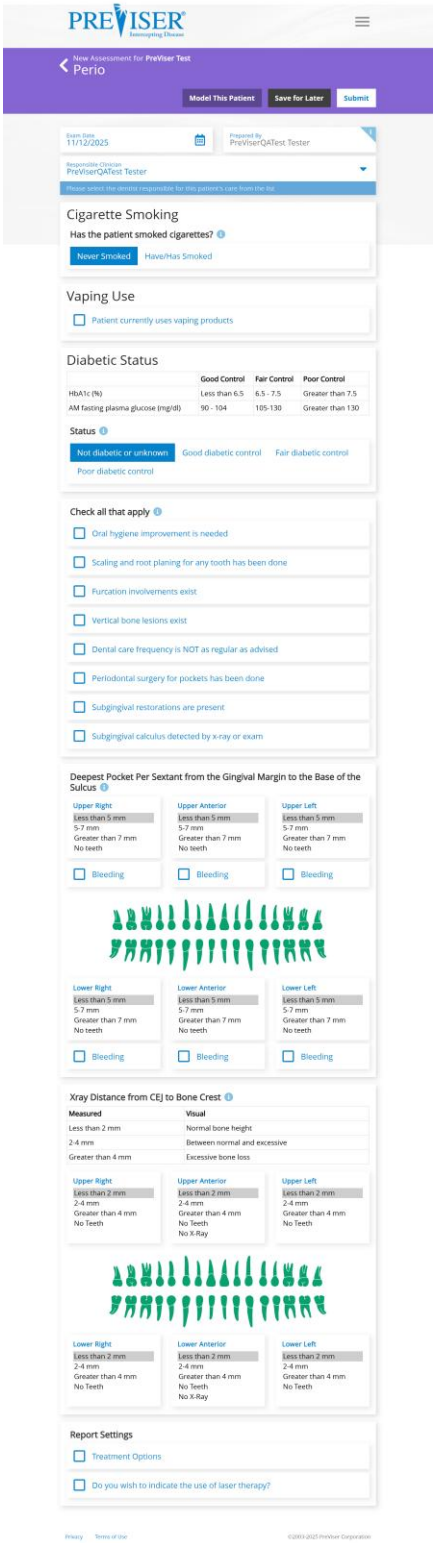
Your Clinical Access Code: FF6KE83TPH

Periodontal Disease Assessment

From the Patient Details page, you can perform a periodontal disease risk and severity assessment by clicking the **Perio** link.

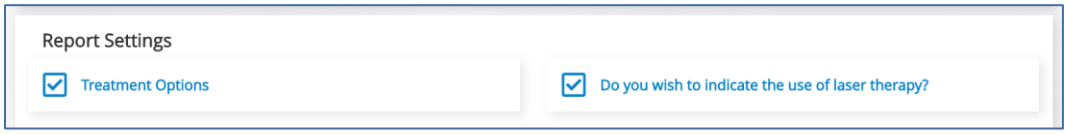
Fill out the information required to perform a periodontal disease risk and severity assessment.

Click **Submit**.



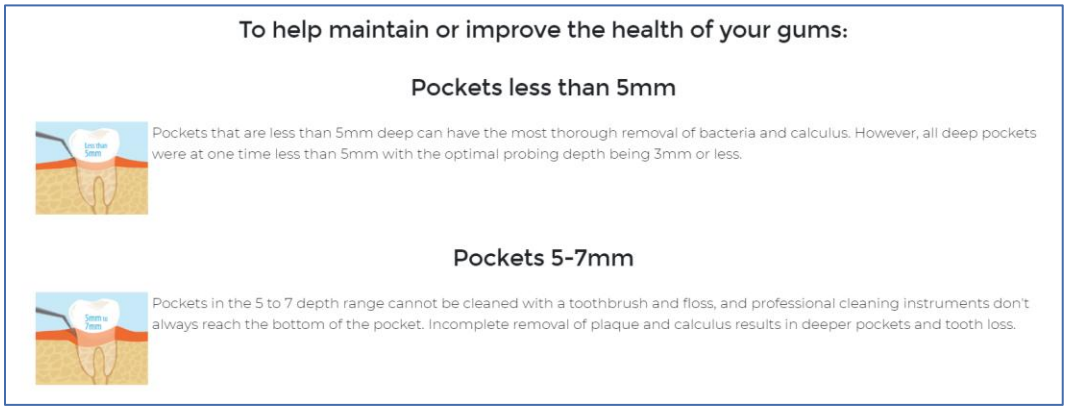
Report Options - Perio

Once the data input form for the Perio risk assessment is completed, select from the following options to be included in the report:



Treatment Options

This is a selectable feature and, if the box is checked, suggested treatments will be included in the report.



As noted on the report, these possible therapeutic recommendations will apply unless the patient is "stable and without inflammation." This exception is noted since a patient may have residual pocketing or bone loss but lack current inflammation, so active intervention is not needed in preference to maintenance procedures.

Do you wish to indicate the use of laser therapy?

If lasers are part of your armamentarium, you can check this box and an additional message will appear in the Treatment Recommendations section. Example:

Our office uses the latest in laser technology to ensure the best outcome for our patients. The use of lasers may influence which therapy is the most suitable for you.

THE PERIO PATIENT REPORT

Periodontal Disease Risk

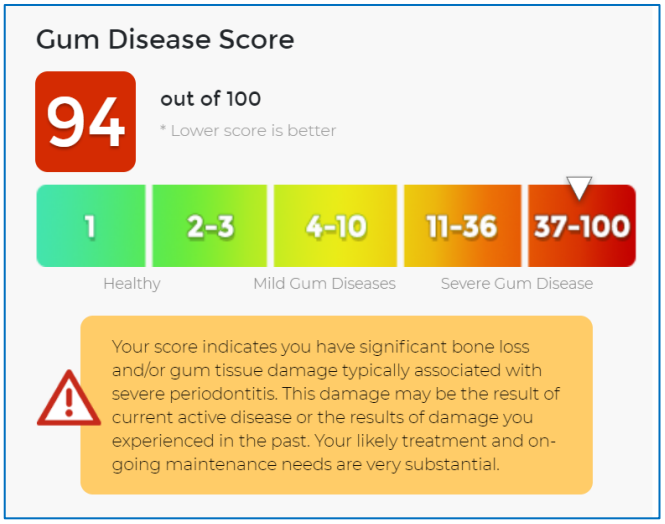
The PreViser patient reports are designed to give the patient clear scores for oral disease risk and severity. For periodontitis, the report delivers a scientifically validated 1 to 5 score for perio risk. This score reflects the likelihood that the patient will develop periodontitis, or that existing perio severity will worsen. Example:

Periodontal Disease Severity

This score reflects current perio severity on a 1 to 100 scale where:

- A score of 1 is perfectly healthy mouth without bleeding, pocketing or bone loss;
- A score between 2 and 3 indicates sextant bleeding on probing (gingivitis) but no pocketing or bone loss;
- A score between 4 – 10 indicates mild periodontitis;
- A score between 11 – 36 indicates moderate periodontitis;
- A score between 37 – 100 indicates severe periodontitis.

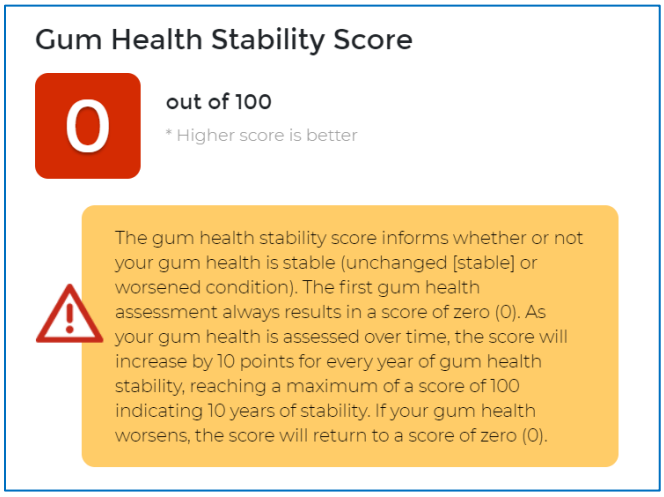
Within each of these ranges the condition varies between localized to generalized, and each increment in the score represents a measurable improvement or deterioration in periodontal status. Example:



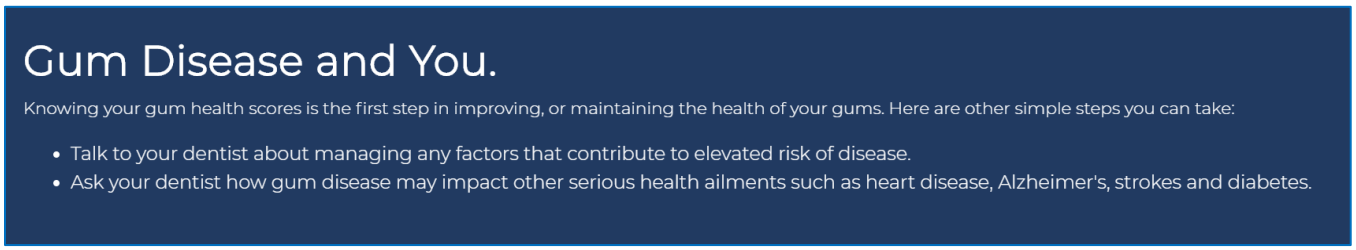
Hint: A patient who has experienced periodontitis and bone loss won't grow back that bone, so their score can never return to a score of "1." However, without inflammation, the patient can be considered "Stable" in the sense that they are not suffering from continuing deterioration or current inflammation.

Periodontal Disease Stability

This score reflects how long the patient has been stable with unchanged scores. The purpose of this score is to "reward" and motivate patients whose risk and severity scores are constant by having their stability continue to climb. The score will always start at a baseline of zero and continue to rise at a maximum of 10 points per year, not exceeding 100 points which represents 10 full years of periodontal stability. The graphic below indicates that the patients' periodontal status has remained stable for 4 years. If the patient was stable for 4.5 years, the patient's score would be 45. If the patient's periodontal status regresses, or the patient's exhibits periodontal bone loss, the gum health stability score would reset to zero. Example:



Below is a brief guide on how to improve one's periodontal health:



If Treatment Options were indicated to be included in Report Settings before the data was submitted to PreViser, those print, followed by the Clinical Inputs you provided that generated the scores shown on the report.

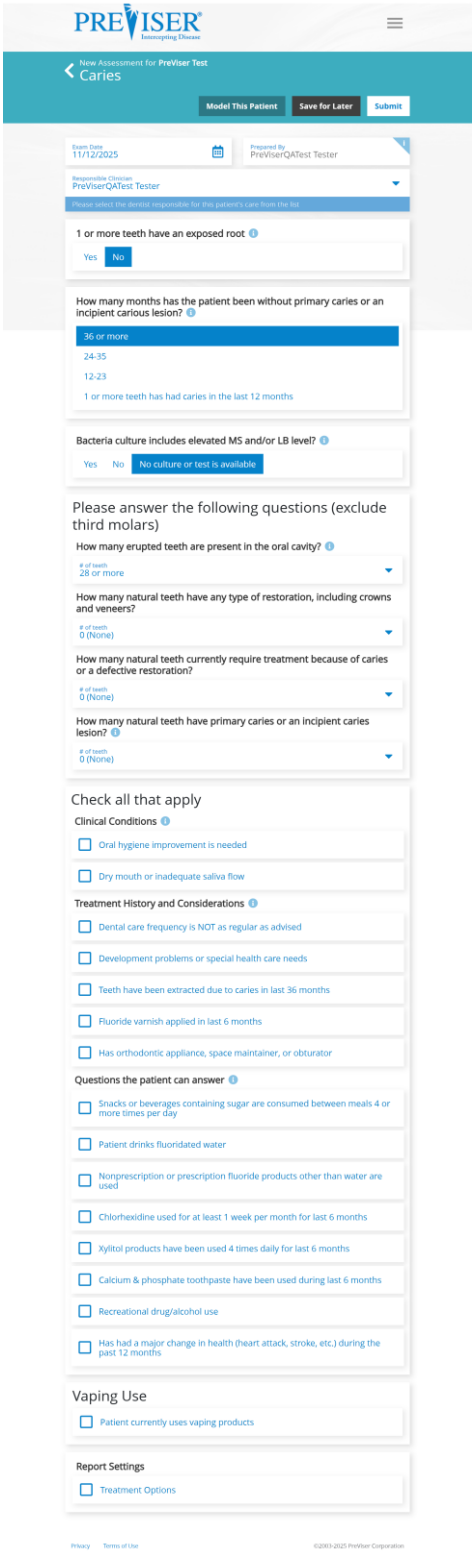
An example of the full Periodontal Disease Patient Report can be found in Appendix A.

The Perio assessment report can be view in either English or Spanish, depending on the option selected by clicking on the **Language** drop-down.

Caries Assessment

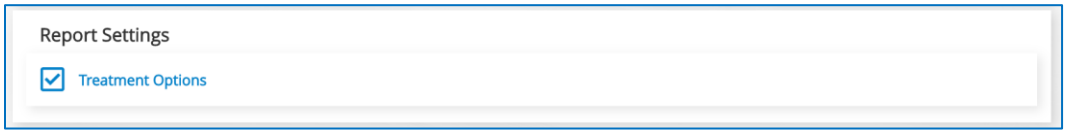
From the Patient Details page, you can perform a caries risk and severity assessment by clicking the **Caries** link:

Fill out the information required to perform a caries risk and severity assessment.



Report Options - Caries

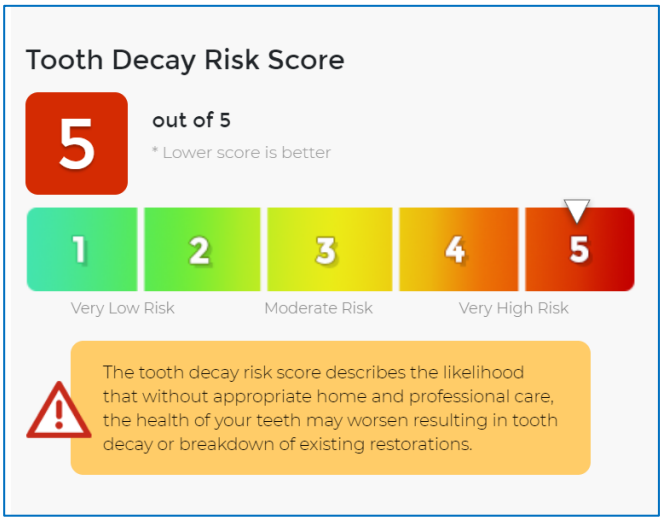
Once the data input form for the caries risk assessment is completed, select from the following options to be included in the report:



Caries Risk

The PreViser patient reports are designed to give the patient clear scores for oral disease risk and severity. For caries, the report delivers a 1 to 5 score for caries risk based on the Caries Management by Risk Assessment (CAMBRA) approach to risk determination. This score reflects the likelihood that the patient will experience new caries, or that existing restorations will become defective. The Clinical Suite caries risk method expands the concept of CAMBRA, which predicts primary caries, to include secondary caries. Example:

In this example, the patient presents with a high risk of new defects and would then be a prime candidate for adult sealants, fluoride treatments and regular dental care. This score can be used to help the patient understand why professional oral care is so important.

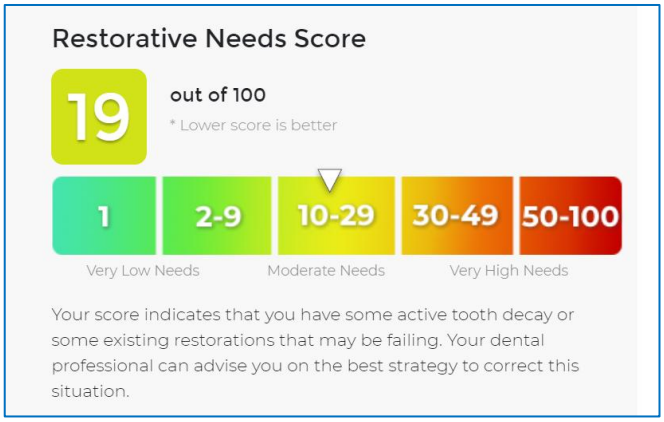


Restorative Needs Score

This score reflects the current status of the dentition on a 1 to 100 scale where:

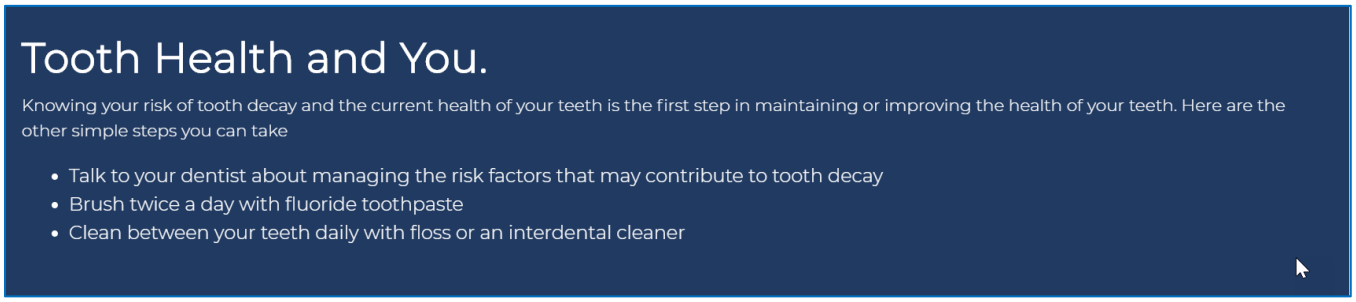
- A score of 1 is a pristine dentition without carious lesions or any restorations.
- A score between 2 and 9 is a sound dentition with no current defects but with an increasing percentage of the total dentition in a restored state as the score increases from 2 to 9.
- A score between 10 and 100 represents a dentition with current active treatment needs, either due to a new carious lesion or because an existing restoration is defective. As the score becomes greater, a greater percentage of the total dentition is affected by a defect. A score of 100 would indicate that all teeth in the dentition have a defect.
    - Example: If a patient has only one tooth remaining, and that tooth had a lesion, the restorative needs score would be 100. When restored, the score would drop to 9.
    - Example: If a patient has a full dentition, and one tooth had a lesion the restorative needs score would be 10. When restored, the score would drop to 2. Example:

In this example, the patient presents with Moderate Needs as indicated by a restorative needs score of 19. This equates to up to three defects that require therapeutic intervention.



In addition to a risk and restorative needs score, the caries patient report includes other elements of interest:

Tooth Health and You
This section gives the patient a quick summary of strategies that can help improve their oral health. Example:



Treatment Options

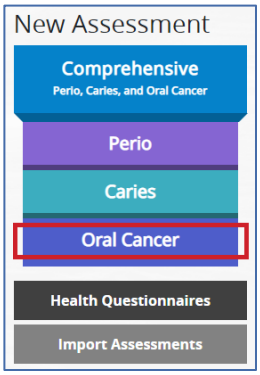
As discussed above, this section of the report describes the preventive activities that may be helpful to improving the patient's oral health. It can be optionally printed by checking the box in the Report Settings section.

An example of the full Caries Patient Report can be found in Appendix A.

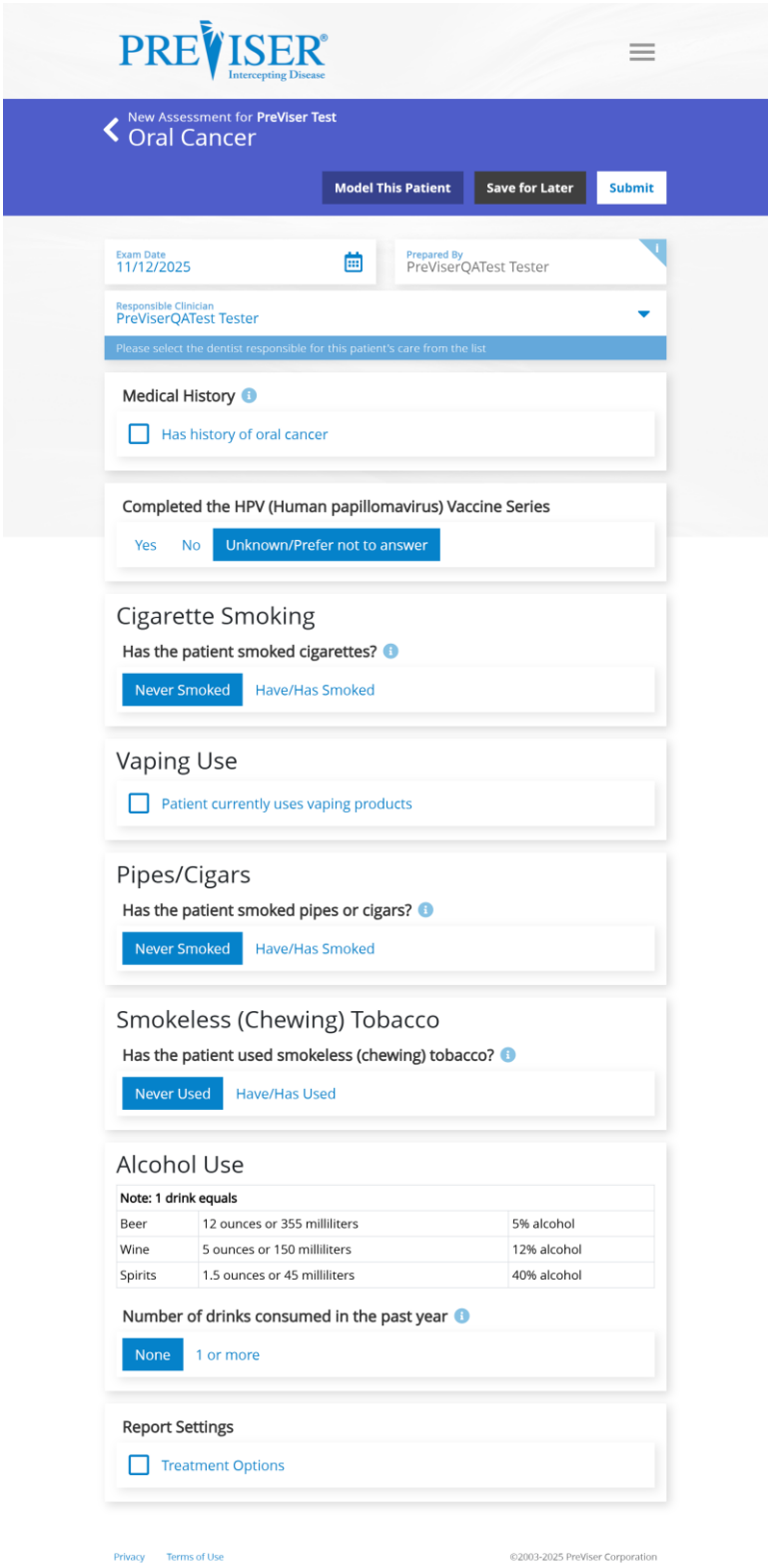
The Caries assessment report can be view in either English or Spanish, depending on the option selected by clicking on the **Language** drop-down.

Oral Cancer Risk Assessment

From the Patient Details page, you can perform oral cancer risk assessment by clicking **Oral Cancer**:

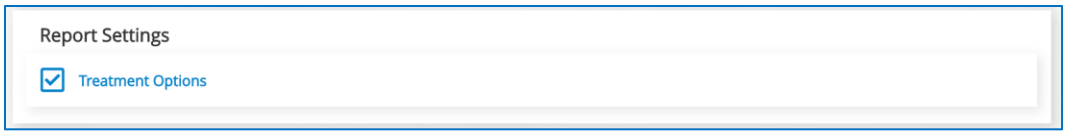


Fill out the information required to perform an oral cancer risk and severity assessment:



REPORT OPTIONS – ORAL CANCER

Once the data input form for the Perio risk assessment is completed, select from the following options to be included in the report:

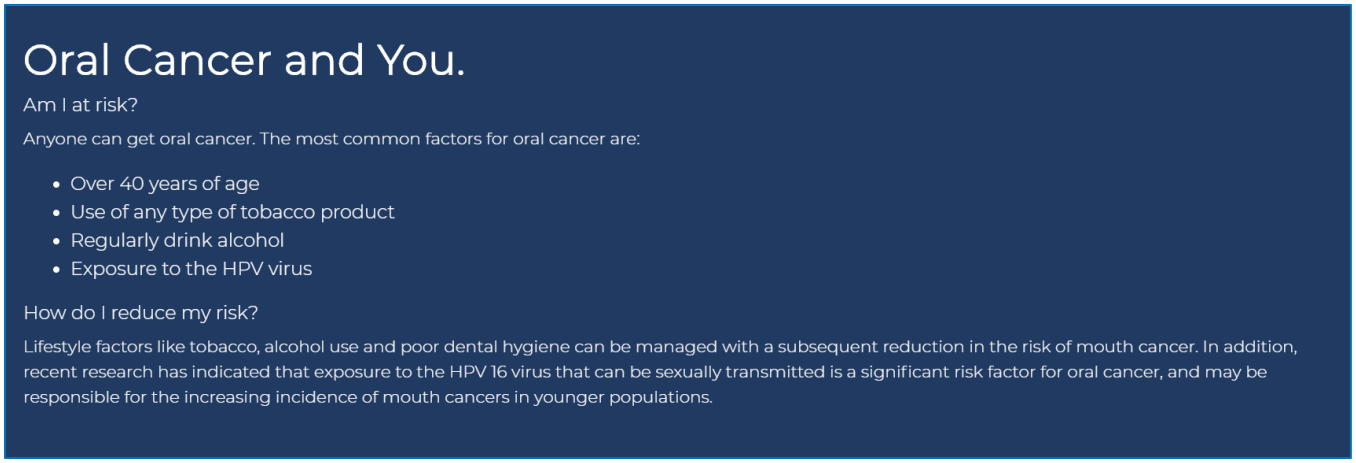


Oral (Mouth) Cancer Disease Risk

PreViser patient reports are designed to give the patient clear scores for oral disease risk and severity. For oral cancer, the report delivers a risk score from 1 to 5. This score reflects the possibility that the patient will experience an oral cancer lesion. Example:

Note: *Because a person has elevated risk for mouth cancer does not mean they are likely to experience this terrible, if infrequent, disease. Rather, it means that they have exhibited risk factors that increase the possibility of developing the disease. It is helpful to explain to a patient that just because your home is at elevated risk for catching on fire due to the proximity of flammable brush or trees surrounding the home it doesn't mean the house will catch on fire - just that the risk factors increase that possibility. The oral (mouth) cancer risk score is designed to encourage the patient to reduce the risk factors associated with the disease, like the use of smokeless tobacco or alcohol.*

A brief discussion of Oral Cancer and You is provided. Example:



If you select **Treatment Options** in **Report Settings** before submitting the clinical data to generate the report, those recommendations will be included. **Clinical Inputs** will also display and can be printed optionally to help guide the patient on what risk factors may be elevating their risk scores.

An example of the full Oral Cancer Patient Report can be found in Appendix A.

The Oral Cancer assessment report can be view in either English or Spanish, depending on the option selected by clicking on the **Language** drop-down.

Comprehensive Assessment

The comprehensive assessment includes the questions and a 'What's Changed' section from all three assessments (caries, perio, and oral cancer). It would typically be done as the first PreViser assessment on a patient; or when a patient first presents for services; or on request from an insurer. It combines the caries, perio and oral cancer assessments into one document, and while it takes time to complete, provides a comprehensive guide to the complete treatment plan a new or existing patient will benefit from.

An example of the full Comprehensive Patient Report can be found in Appendix A.

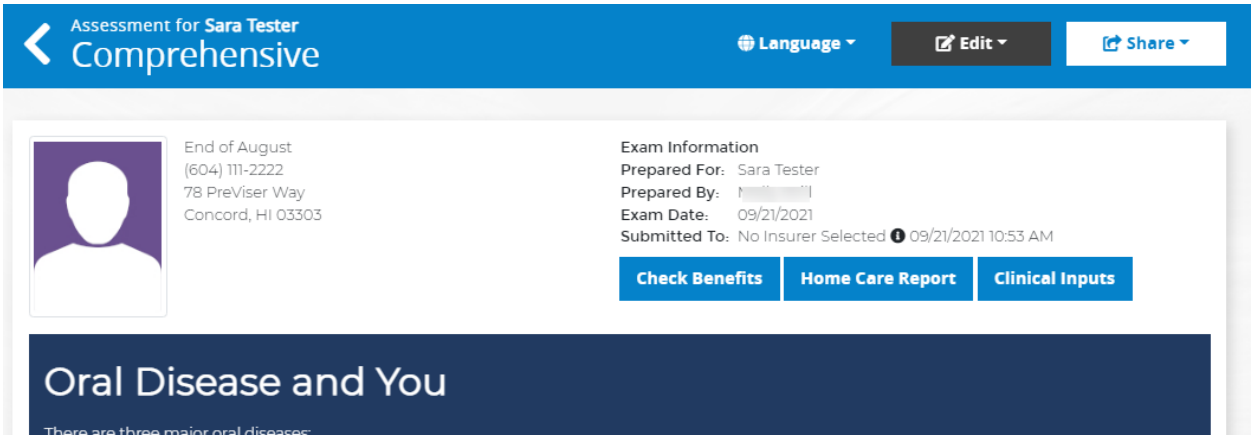
The Comprehensive assessment report can be view in either English or Spanish, depending on the option selected by clicking on the **Language** drop-down.

Return of Benefits

Some insurance carriers offer a return of benefits after an assessment has been completed for a verified patient. This feature offers the dental office and clinician chair-side return of benefits which includes maximum allowance, remaining allowance, limitations and enhanced benefits if a patient qualifies for additional benefits based on the patient's Clinical Suite scores, to name a few.

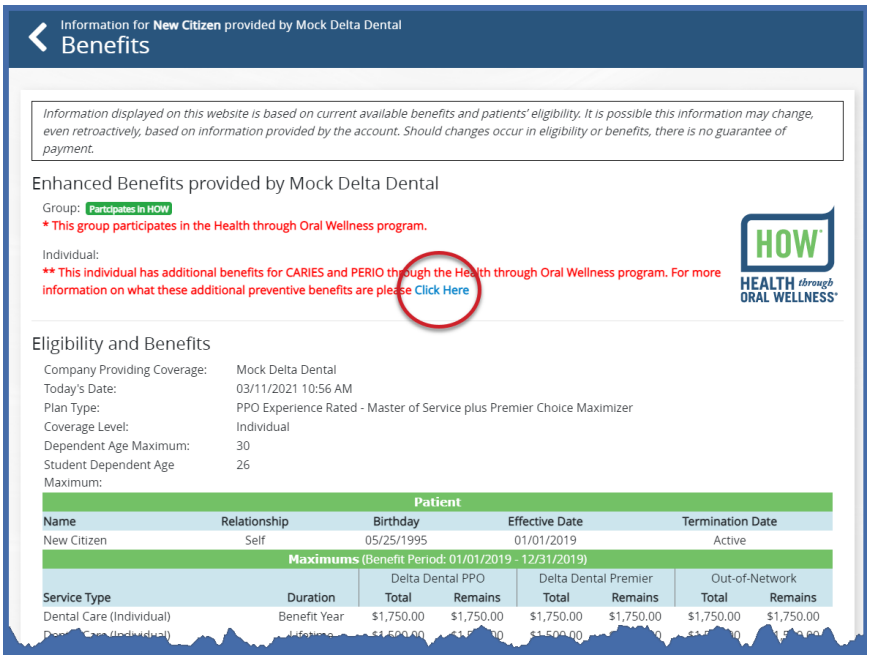
Check Benefits

After assessment has been submitted, the top of the report will display a **Check Benefits** button for a verified patient. ***Note:*** *This button will not display for a patient with no insurance, or a patient who has an insurance carrier that does not support this feature.* In order to access the benefits of the patient, click the **Check Benefits** button at the time the report is generated. The **Check Benefits** button will not display on previous assessment reports.



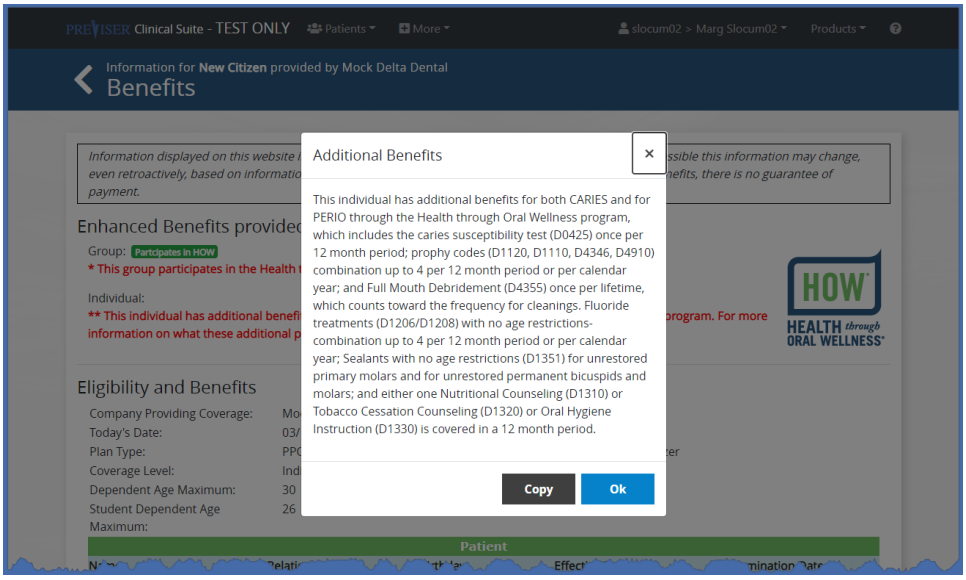
BENEFIT RETURN DISPLAY:

When you click **Check Benefits**, the current benefits of the verified patient displays:



ADDITIONAL ENHANCED BENEFITS INFORMATION:

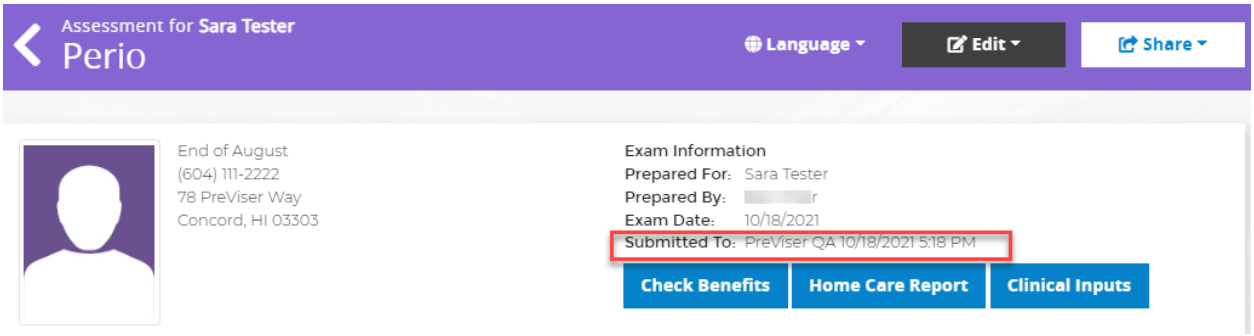
After the benefit return displays, you also have the option to expand on the enhanced benefit plan design for the patient, by clicking **Click Here**, as seen below. The copy button copies the text in the Additional Benefits window allowing you to paste it for reference later.



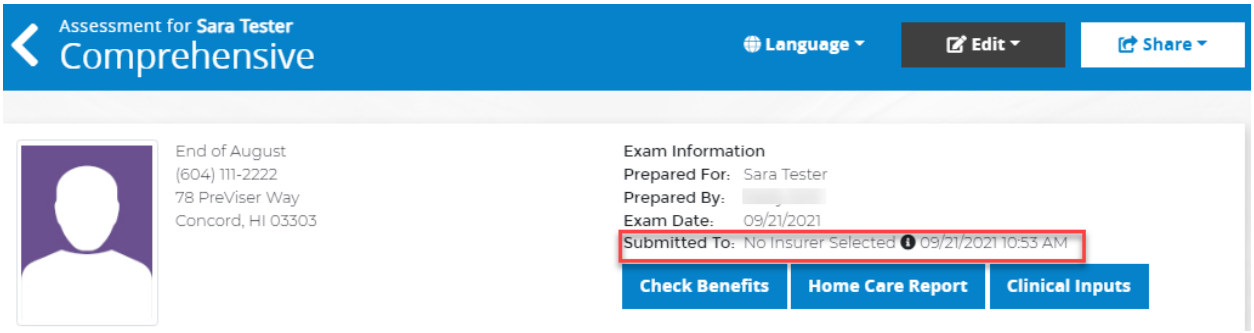
Note: The return of benefits information can only be accessed at the time the finished report has been completed and the Clinical Suite report displays. In other words, you cannot access the return of benefits on any saved reports, because the benefits may not be current.

SUBMITTED TO INSURER STATUS:

This reports the date, time, and insurance company to which the assessment was submitted.



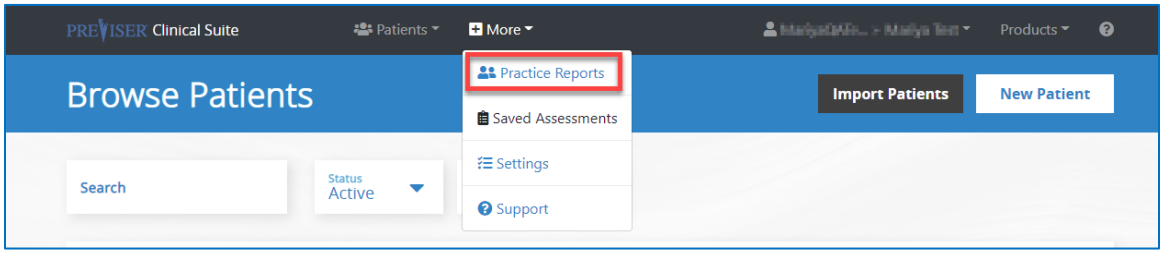
If no insurance for that patient is selected, it should state “no insurer selected.”

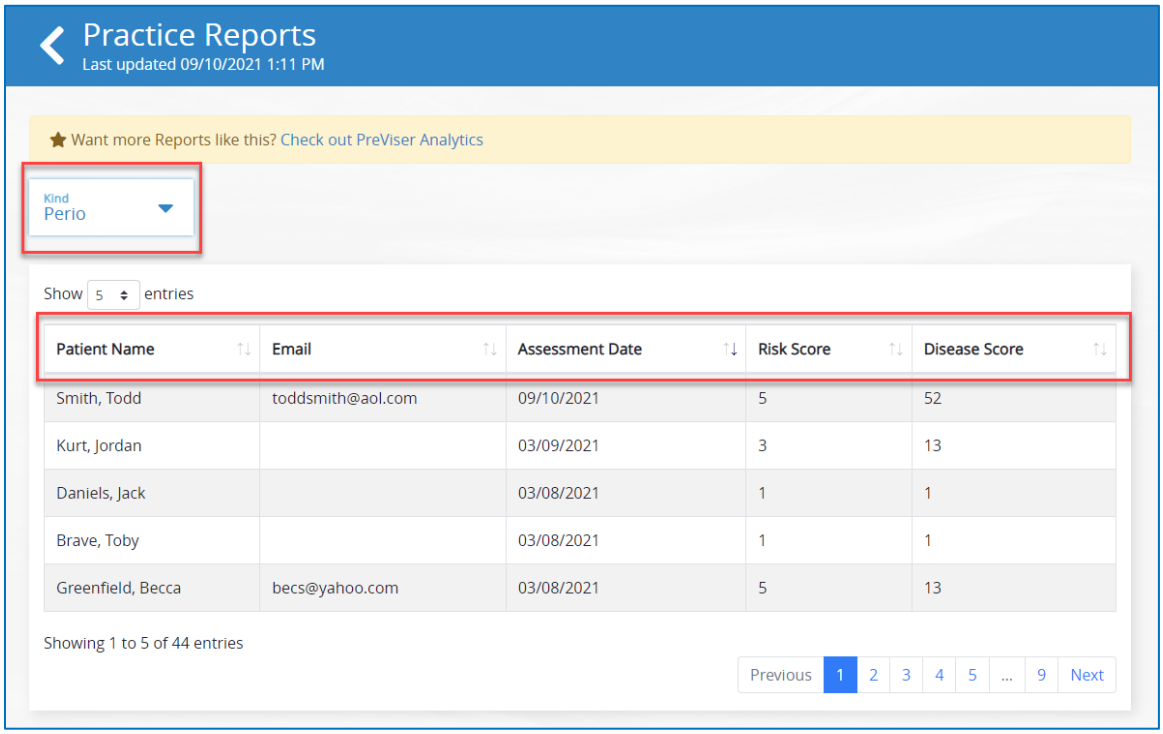


Practice Reports

You can use Practice Reports to identify high-risk patients and help schedule recurring appointments.

Select the **More** dropdown arrow in the top header, then select **Practice Reports**.





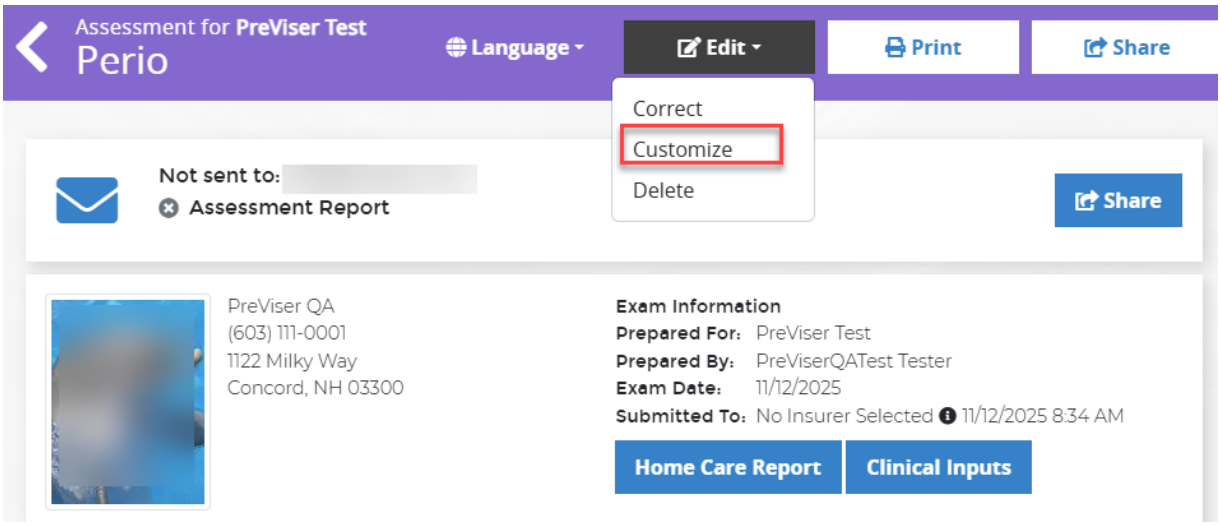
These reports can be organized by assessment type, assessment date, risk scores, and patient names. Organize the reports by assessment date to see when patients may be due for a follow up risk assessment and then reach out to schedule an appointment.

Enterprise Features

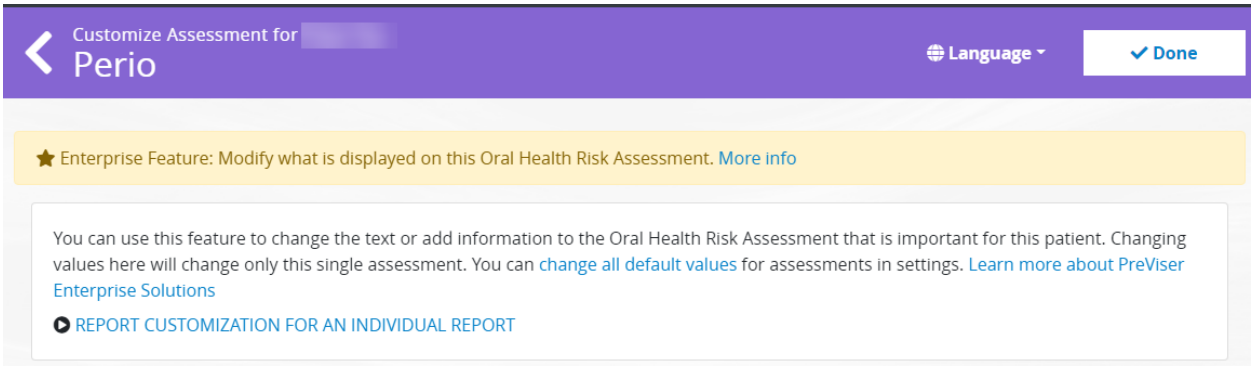
Customizing Individual Reports

Enterprise users can customize **the individual assessment** reports for all four assessment types.

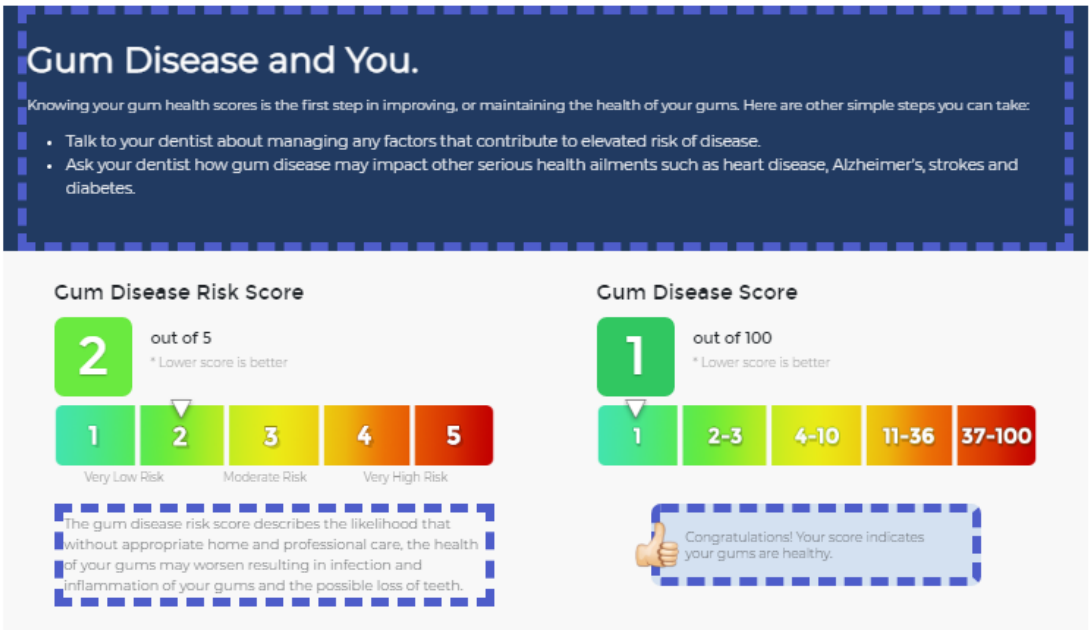
On the assessment report page in PreViser Clinical Suite 5, click on the *Customize* link under the *Edit* drop-down menu to display the *Customize Assessment* page.



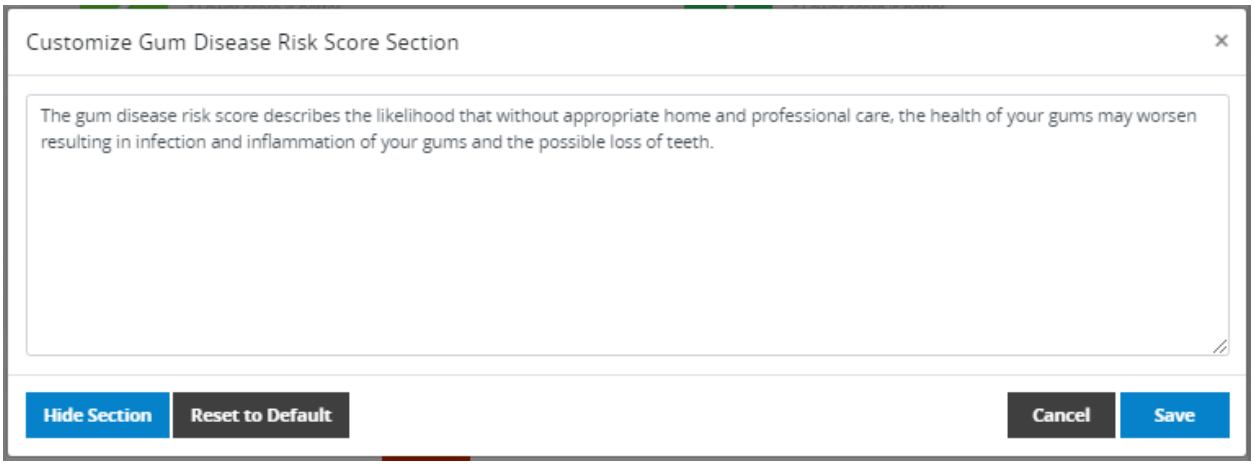
The *Customize Assessment* page will be displayed. Click on the *More Info* link in the top section of the page for detailed information on how to customize reports or watch some videos explaining the feature.



Each of the sections framed with purple dashed box can be customized or hidden:



To begin customizing a section, click within the framed section. A popup window will open, where the user will be able to enter and format the desired text.

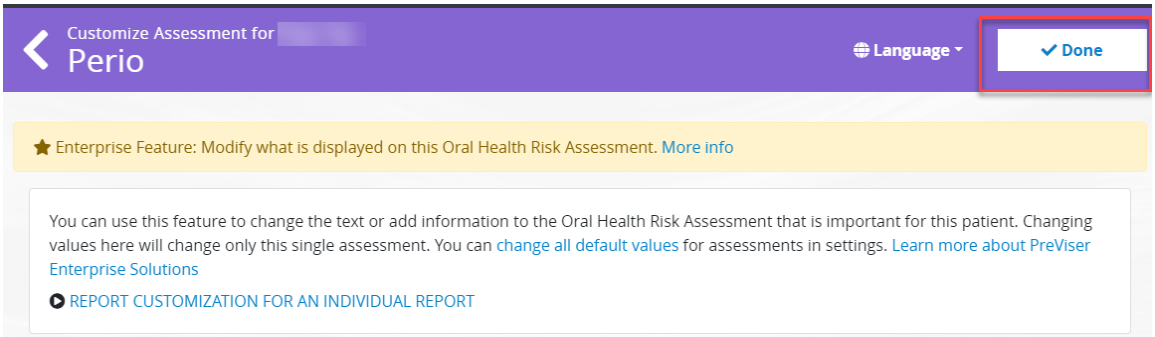


The section can be hidden from the report by clicking on the **Hide Section** button.

If the text was previously customized, the user may want to revert it to the default PreViser content. That can be done by clicking on the **Reset to Default** button.

Click on the **Save** button to confirm the section customization, or on the **Cancel** button to disregard the changes.

After all the desired sections are customized, click on the **Done** button in the top right-corner of the page:



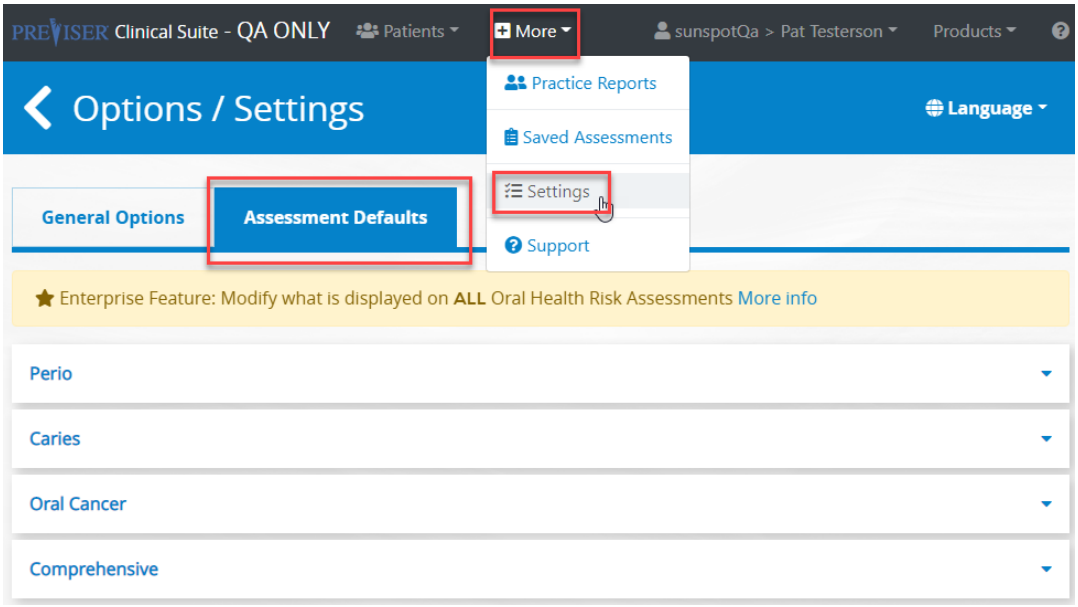
NOTE: Following the steps above will customize only that single report. All other reports will not reflect the customizations.

CUSTOMIZING ASSESSMENT DEFAULTS

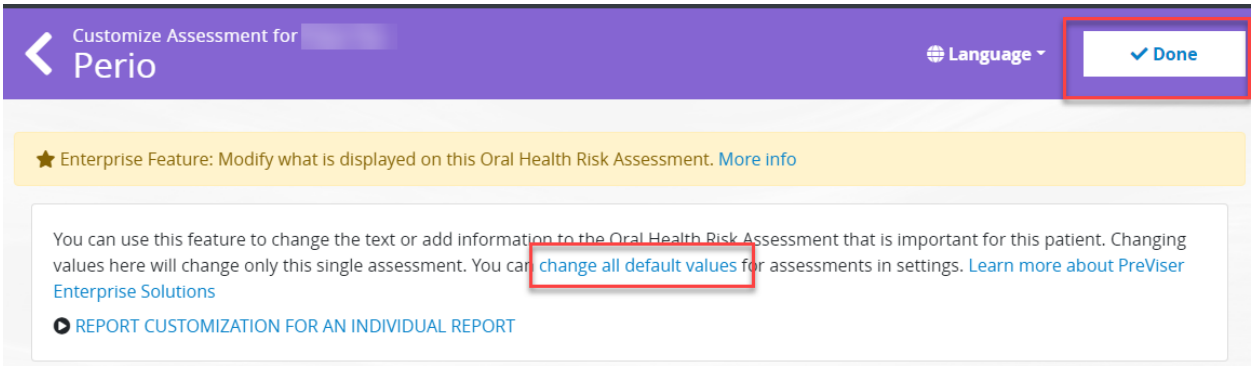
If your practice would like to customize all the assessment reports in the same way as described in the previous section the easiest way to do it is to customize assessment defaults. After the defaults are customized, all the assessments submitted going forward will have the customization.

The *Assessment Defaults* page can be accessed in the following way:

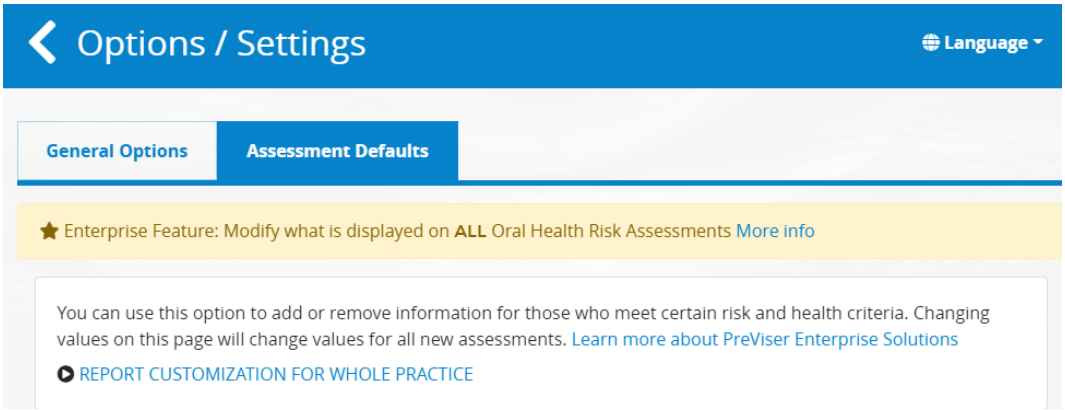
- Click on the *More* drop-down list in the top navigation bar
- Click the *Settings* link
- Click on the Assessment Defaults tab



An alternative way to display the *Assessment Default* page is to click on the *change all default values* link in the *More Info* section of the individual report *Customize Assessment* page:

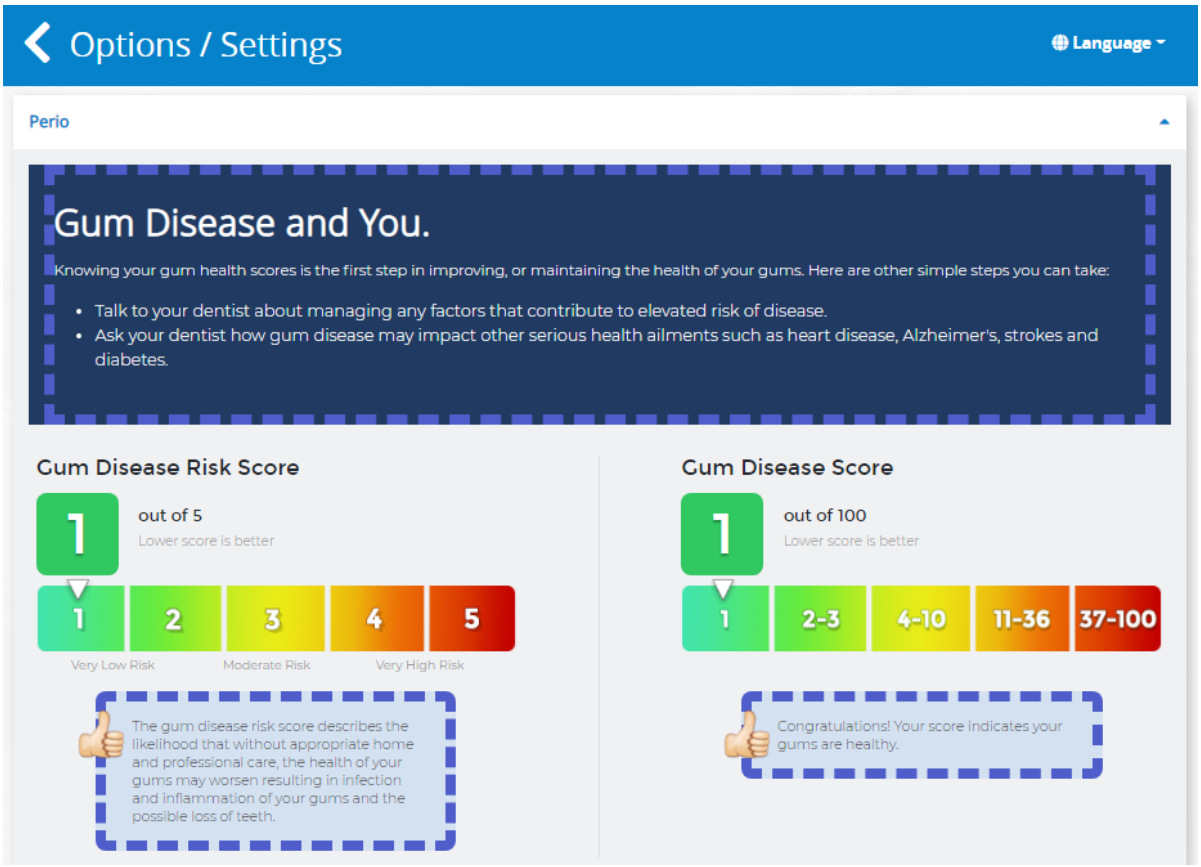


On the *Assessment Defaults* page, click on the *More Info* link in the top section of the page for detailed information on how to customize assessment defaults or watch some videos explaining the feature:

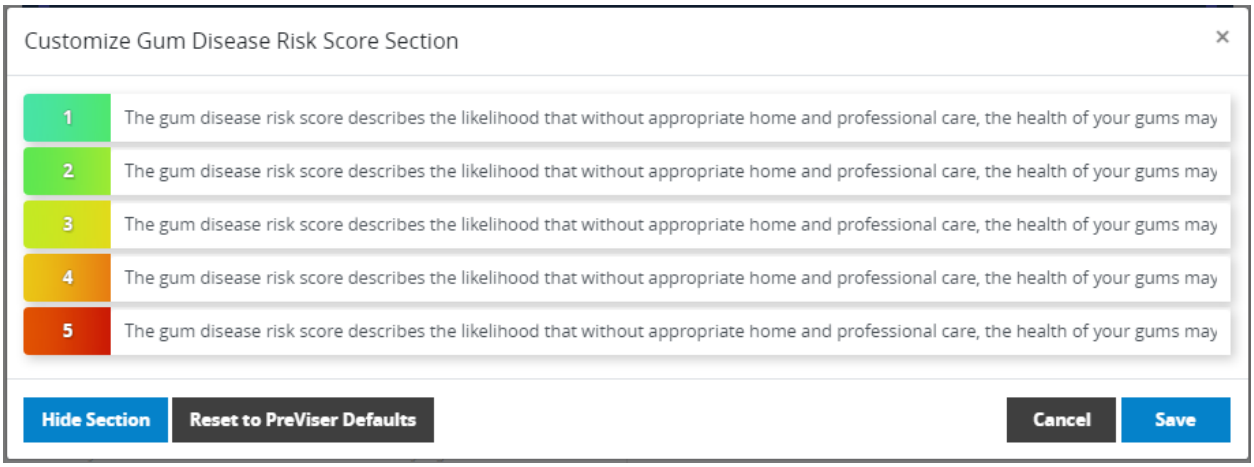


The customizable sections for each report type can be modified by expanding the assessment type section and clicking on the section that needs to be updated.

Note: Even though the assessment defaults have been customized, the user can still override the section text of the individual assessment reports.



A popup window will open, where the user will be able to enter and format the desired text:



The section can be hidden from the report by clicking on the **Hide Section** button.

If the text was previously customized, the user may want to revert it to the default PreViser content. That can be done by clicking on the **Reset to Default** button.

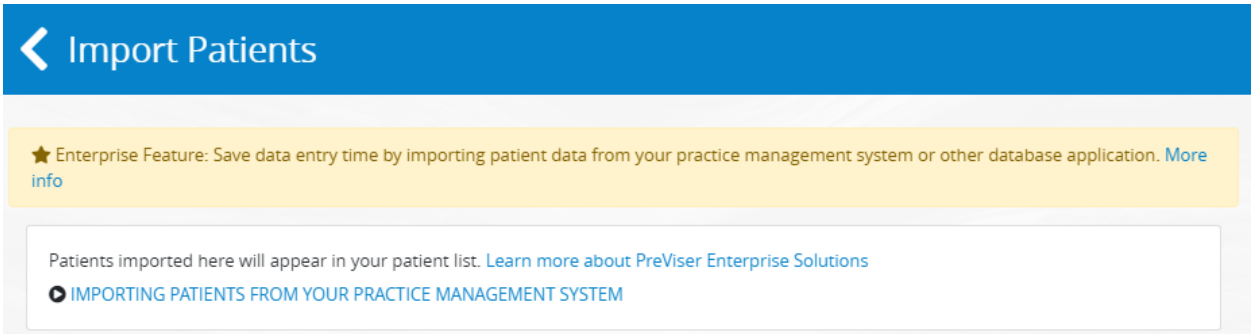
PATIENT IMPORT

The Enterprise addition of the PreViser Clinical Suite supports bulk import of patients. This feature enables you to save data entry time by importing patient data from your practice management system or other database applications.

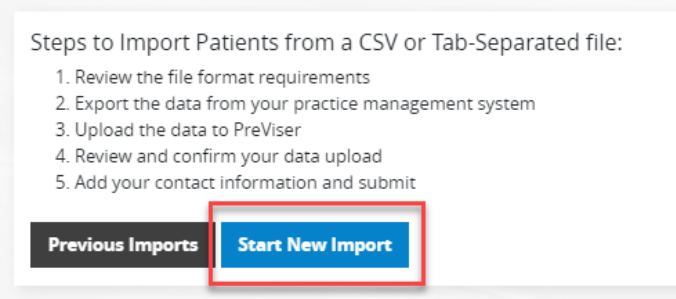
The *Import Patients* page can be accessed in the following way:

- Click on the *Patients* drop-down list in the top navigation bar
- Click the *Import Patients* link

On the *Import Patients* page, click on the *More Info* link in the top section of the page for detailed information on how to initiate a patient import or watch some videos explaining the feature:



To import patients, follow the steps outlined on the *Import Patients* page. Start by clicking on the **Start New Import** button:



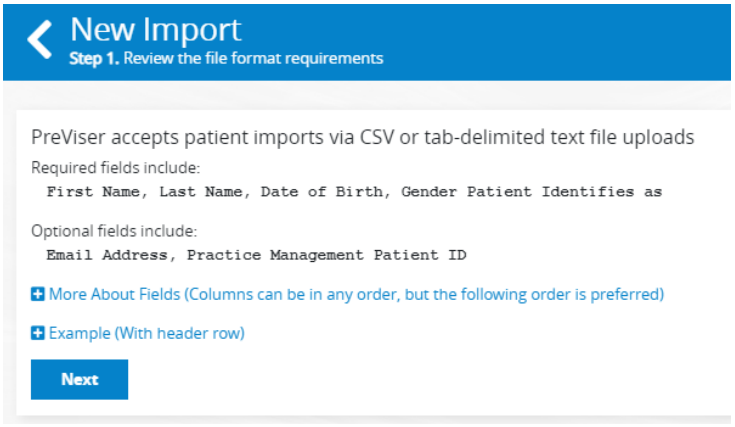
PreViser accepts patient imports via CSV or tab-delimited text file uploads. The required fields include:

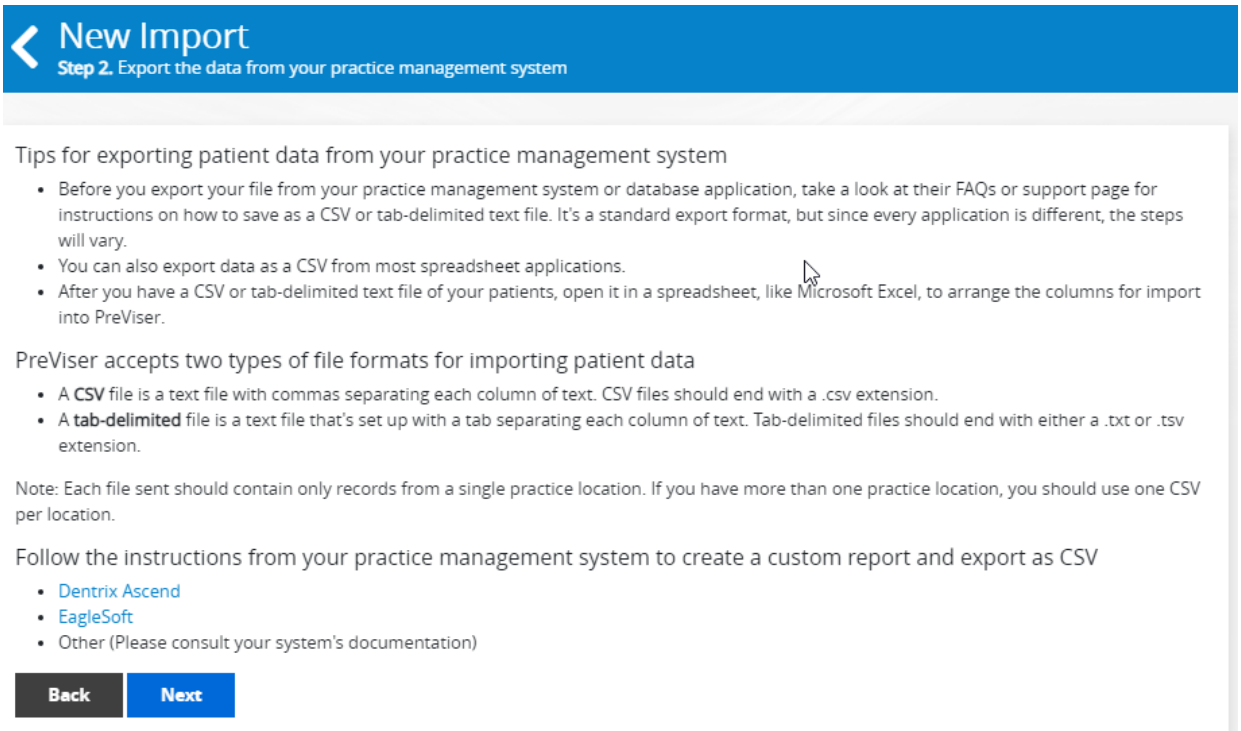
First Name, Last Name, Date of Birth, Gender Patient Identifies as

Optional fields include:

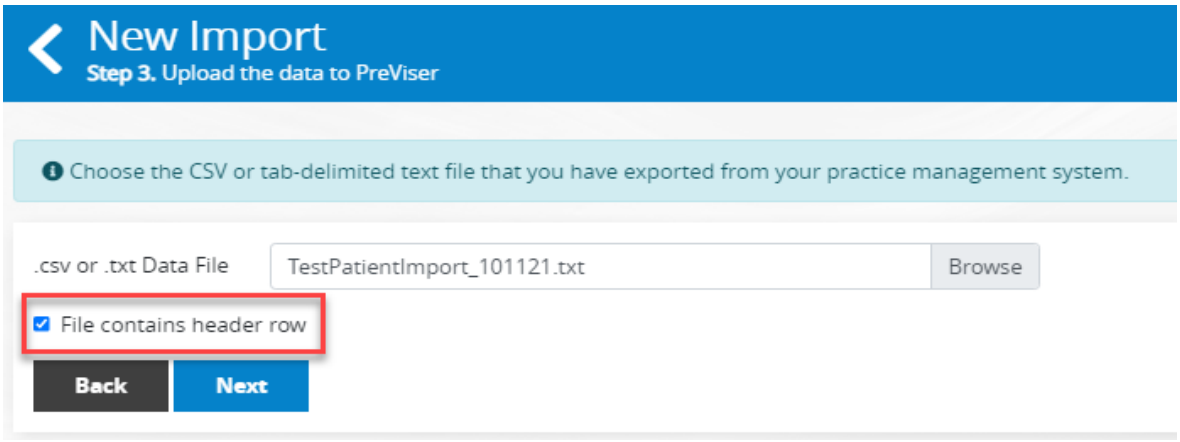
Email Address, Practice Management Patient ID

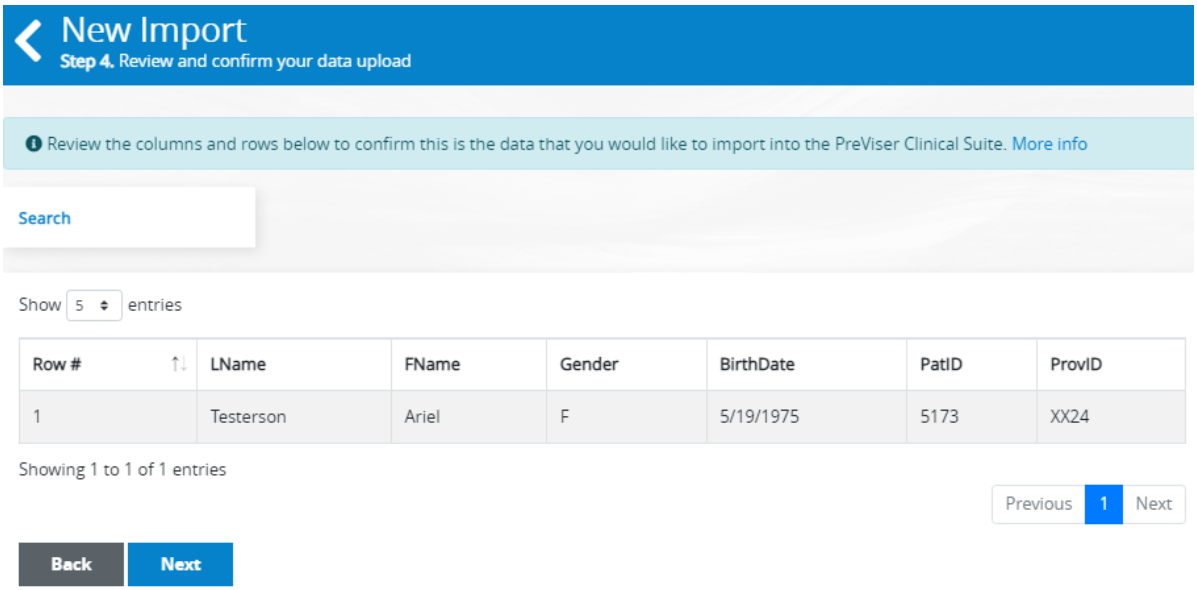
The steps to import patients are explained in more detail on the subsequent screens. Click on the **Next** button to get to the next step.





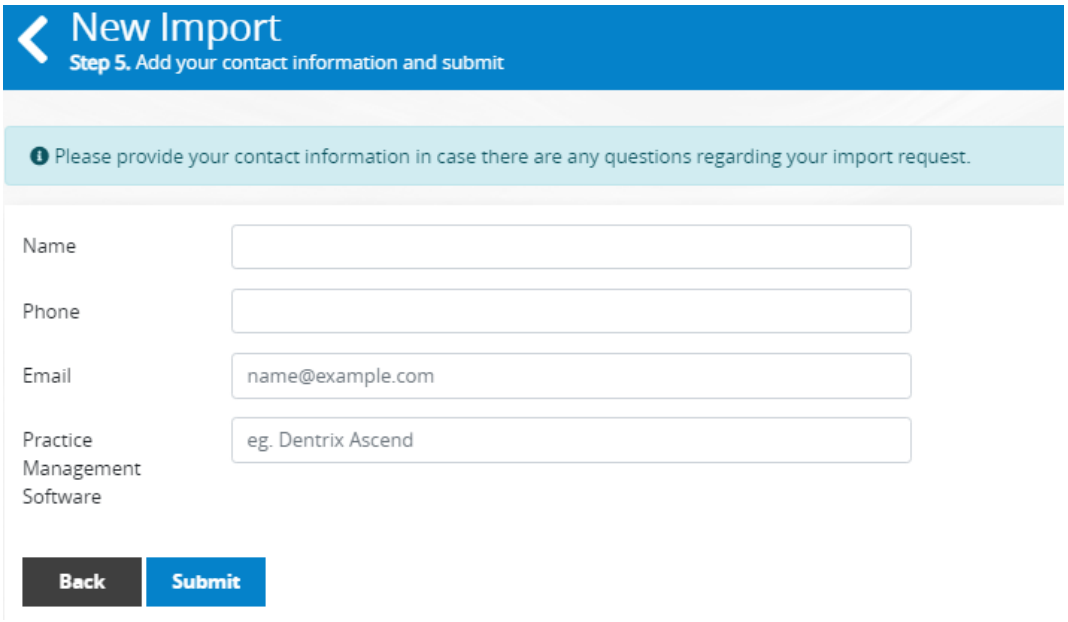
The first record of the uploaded file can contain the column titles. If that's the case, check the *File contains header row* checkbox on the *Step 3* screen:



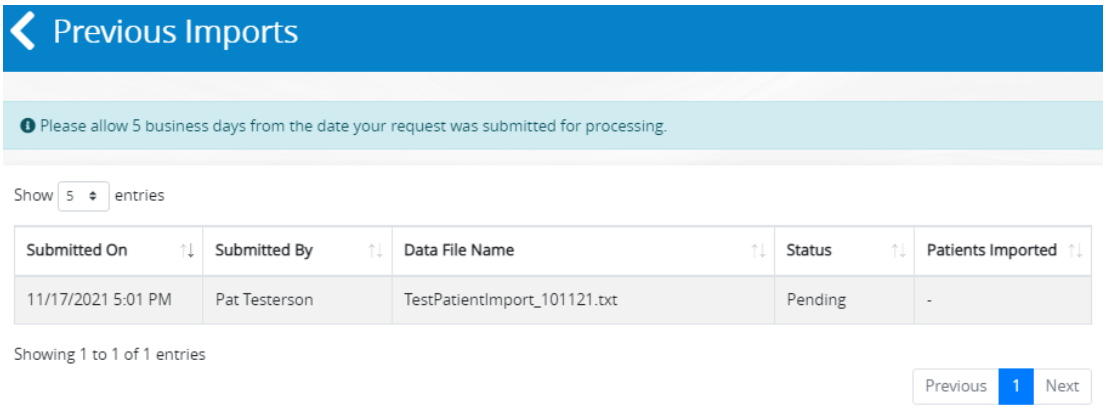


In step 5, please indicate the best contact information for PreViser to reach out to you in case of any questions pertaining to the imported data.

Click on the **Submit** button to submit the import request. PreViser will process the import and notify you it has been completed within five business days.

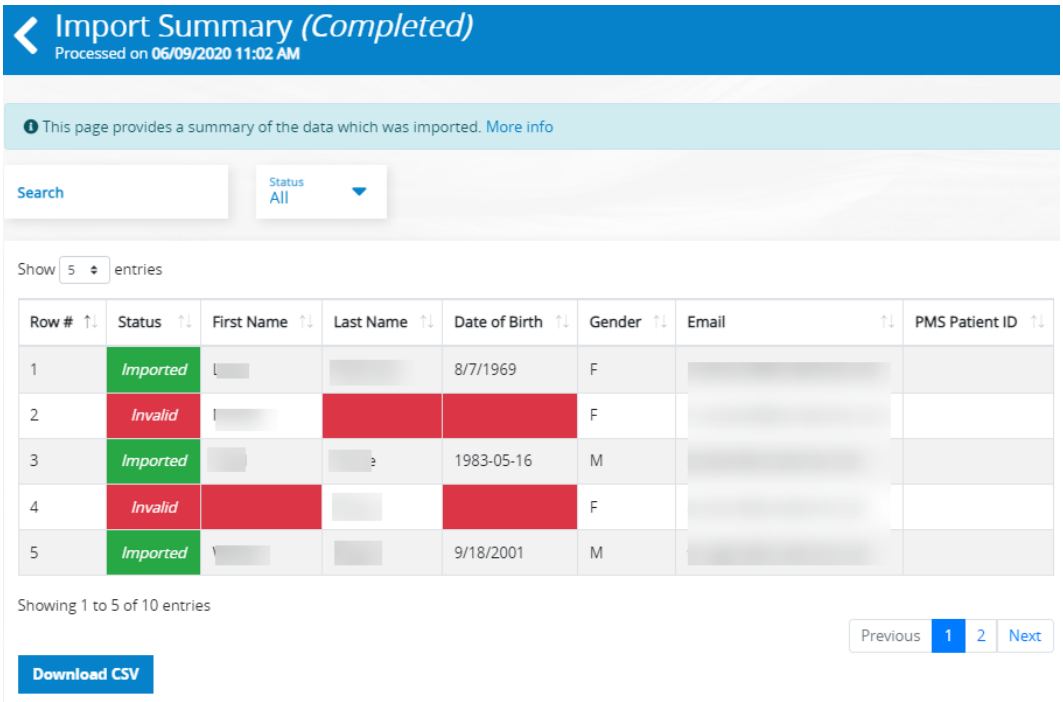


After the import is submitted, you can view the status by clicking on the **Previous Imports** button on the initial *Import Patients* page:



When the import is processed, you will be able to see:

- which patients have been imported
- which patients had missing required data
- any duplicate patients



The Import Summary grid can be downloaded to facilitate correcting invalid records. The file with the corrected records can be re-imported into PreViser Clinical Suite.

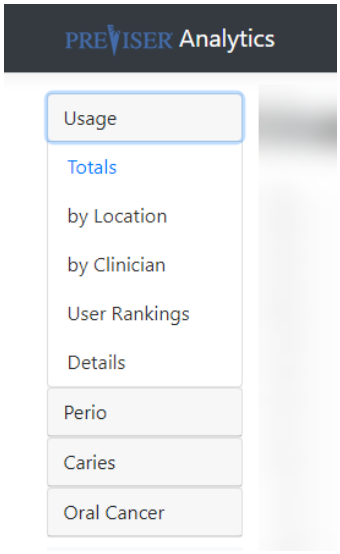
PreViser Analytics

With the PreViser Analytics module, the providers can gain visibility into the overall scores of the patients and the performance of the practice. Analytics is a highly customizable report platform with the data updated every night.

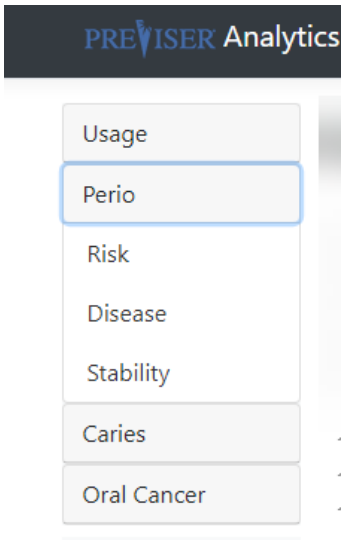
To access PreViser Analytics, click on the *Product* menu on any page of PreViser *MyAccount* or *Clinical Suite 5*:

PreViser Analytics contains two main sections:

Overall clinical assessment usage (reports by clinician or in case of multi0location dental organization, by practice)

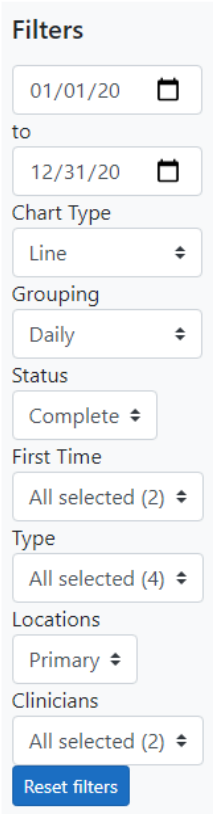


Score distribution for each of the assessment kinds (caries, perio and oral cancer)

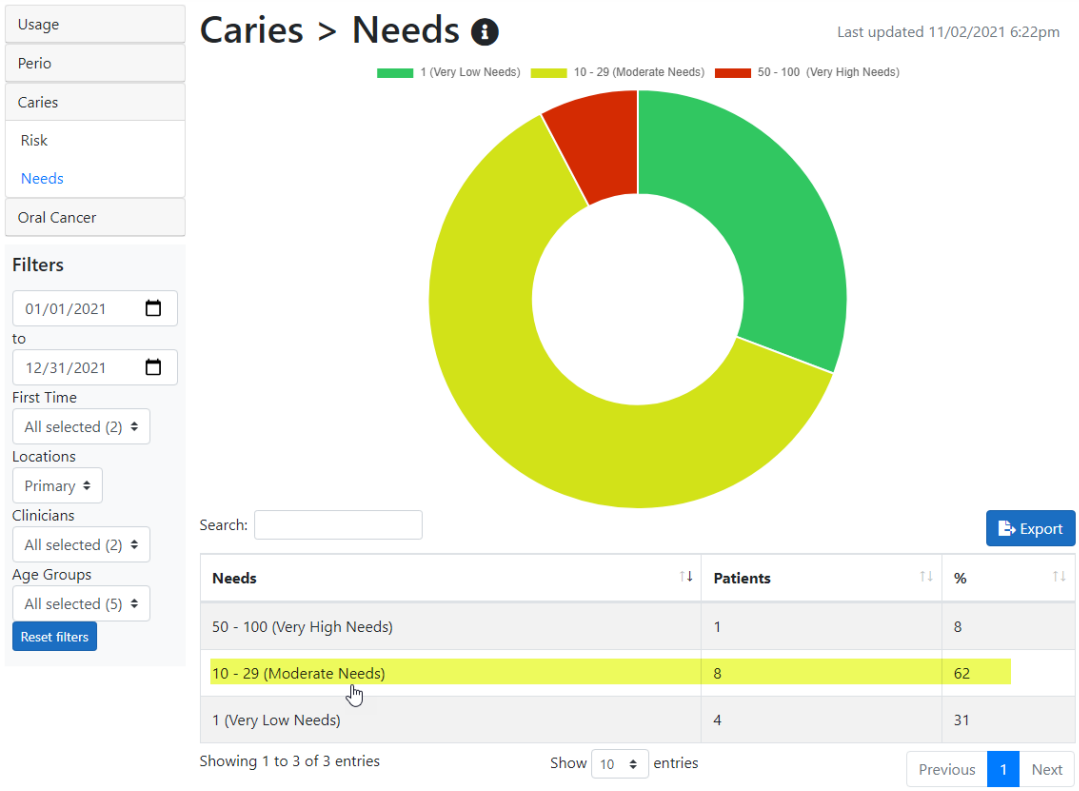


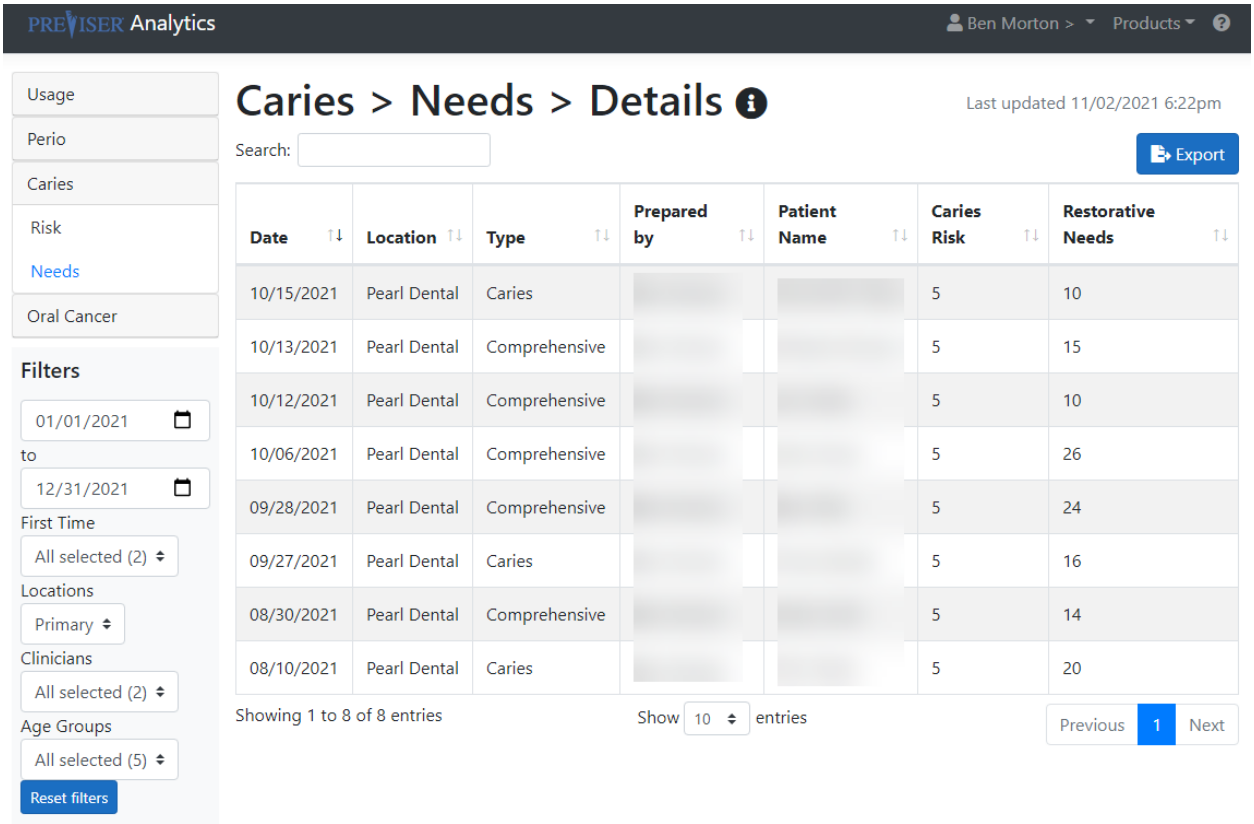
Most of the report criteria can be specified with the Filters accessible throughout Analytics.
The available filters include, but are not limited to:

- date range
- frequency (daily / monthly, …)
- assessment kind
- clinician that performed the assessment
- location



From each of the main reports, the user can drill down to the actual assessments submitted in the PreViser Clinical Suit by clicking on the result rows in the data section of the graph:

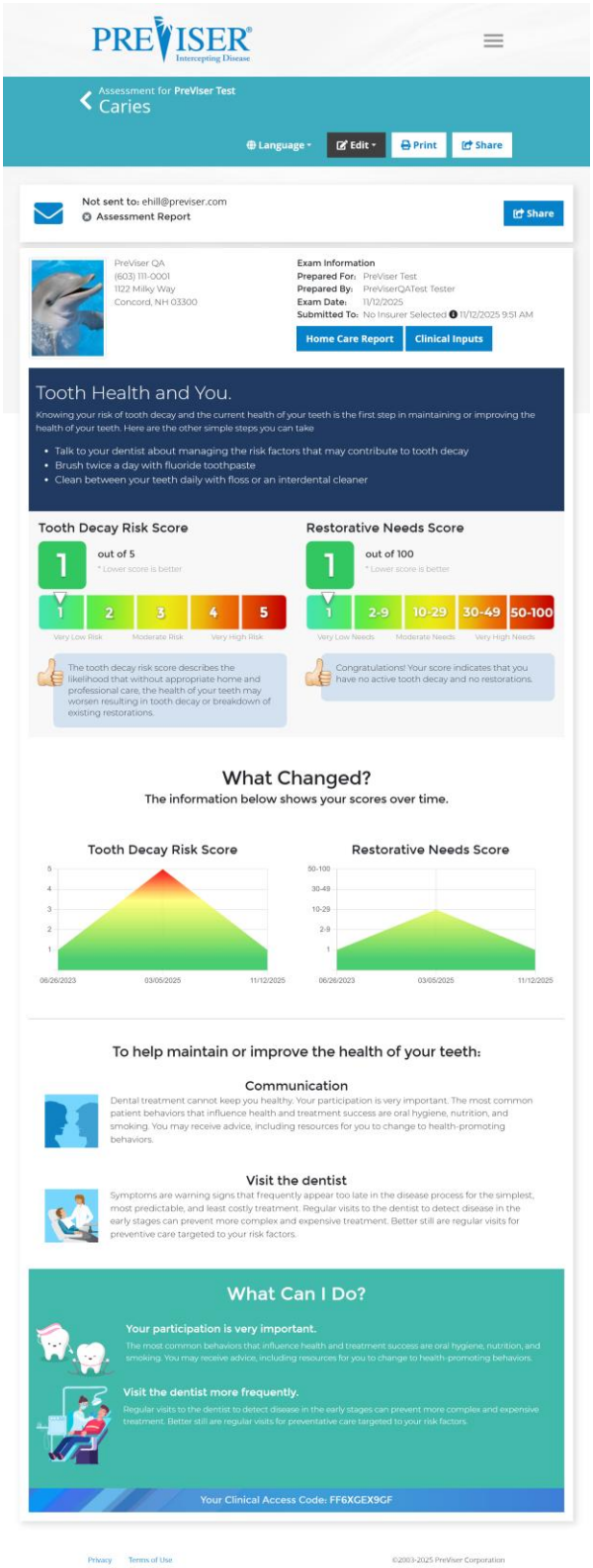

Usage
Perio
Caries
Risk
Needs
Oral Cancer
Filters
01/01/2021
to
12/31/2021
First Time
All selected (2)
Locations
Primary
Clinicians
All selected (2)
Age Groups
All selected (5)
Reset filters
Caries > Needs
Last updated 11/02/2021 6:22pm
1 (Very Low Needs)
10 - 29 (Moderate Needs)
50 - 100 (Very High Needs)
Search:
Export
Needs
Patients
%
50 - 100 (Very High Needs) 1 8
10 - 29 (Moderate Needs) 8 62
1 (Very Low Needs) 4 31
Showing 1 to 3 of 3 entries
Show 10 entries
Previous 1 Next


PREVISER Analytics
Ben Morton >
Products
Usage
Perio
Caries
Risk
Needs
Oral Cancer
Filters
01/01/2021
to
12/31/2021
First Time
All selected (2)
Locations
Primary
Clinicians
All selected (2)
Age Groups
All selected (5)
Reset filters
Caries > Needs > Details
Last updated 11/02/2021 6:22pm
Search:
Export
Date
Location
Type
Prepared by
Patient Name
Caries Risk
Restorative Needs
10/15/2021 Pearl Dental Caries 5 10
10/13/2021 Pearl Dental Comprehensive 5 15
10/12/2021 Pearl Dental Comprehensive 5 10
10/06/2021 Pearl Dental Comprehensive 5 26
09/28/2021 Pearl Dental Comprehensive 5 24
09/27/2021 Pearl Dental Caries 5 16
08/30/2021 Pearl Dental Comprehensive 5 14
08/10/2021 Pearl Dental Caries 5 20
Showing 1 to 8 of 8 entries
Show 10 entries
Previous 1 Next

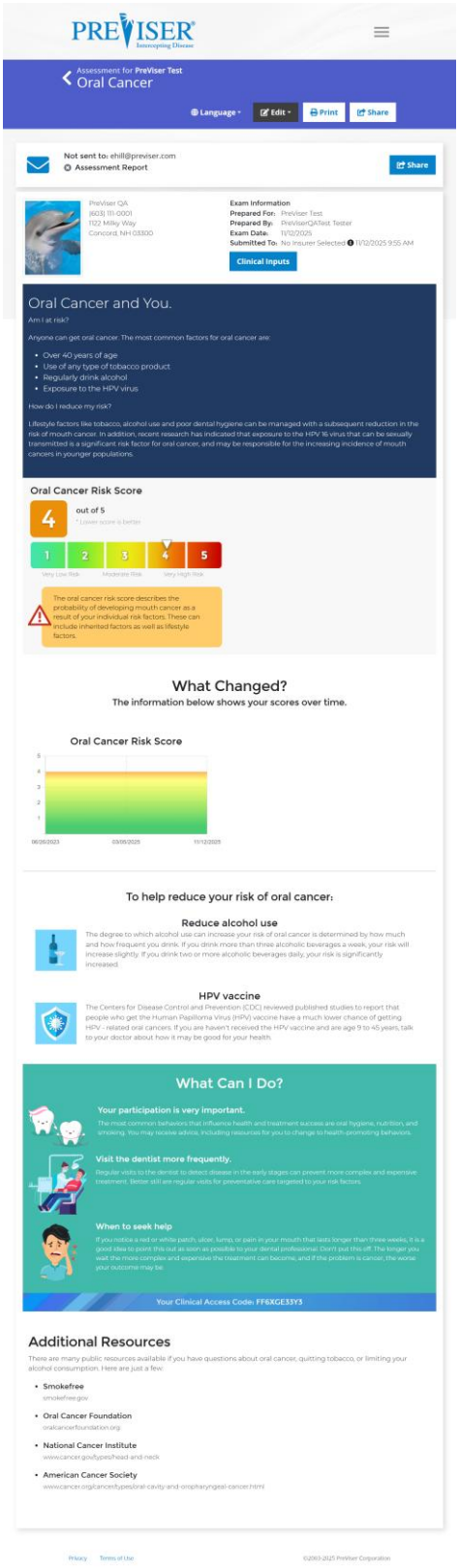
Appendix A – Reports

Perio Report

CARIES REPORT



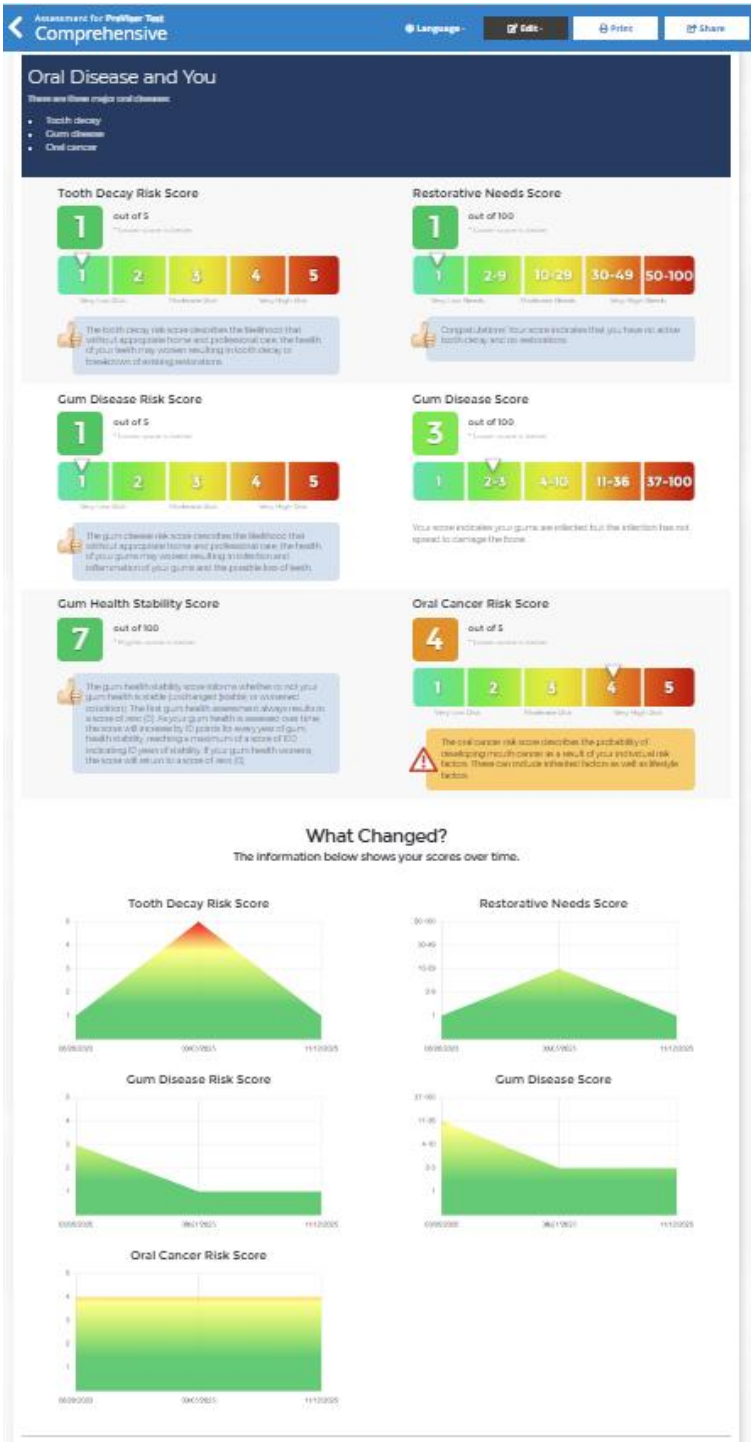
ORAL CANCER REPORT



COMPREHENSIVE REPORT

For clarity, the illustration has been divided into two sections.

Upper:



Lower:

To help maintain or improve the health of your teeth:
Communication
Visit the dentist
To help maintain or improve the health of your gums:
Pockets less than 5mm
To help reduce your risk of oral cancer:
Reduce alcohol use
HPV vaccine
What Can I Do?
Your participation is very important.
Visit the dentist more frequently.
When to seek help
Your Clinical Access Code: FFEXGEM4FX
Additional Resources
Smokefree
Oral Cancer Foundation
National Cancer Institute
American Cancer Society