



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

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

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HIPAA / HITECH

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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
2.7	November, 2025	Updated the section about signing BAA Added section for changing primary clinician Updated all screenshots
2.8	February, 2026	Updated broken links

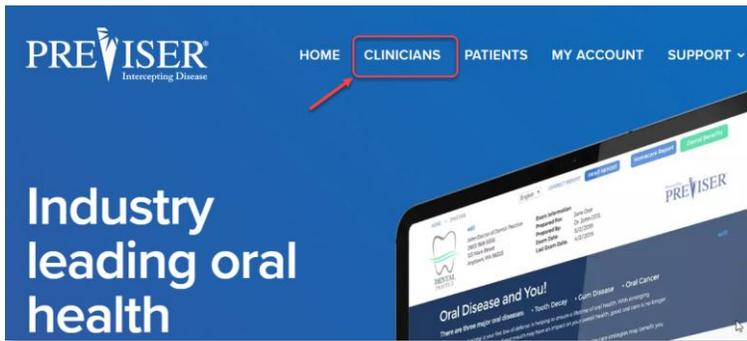
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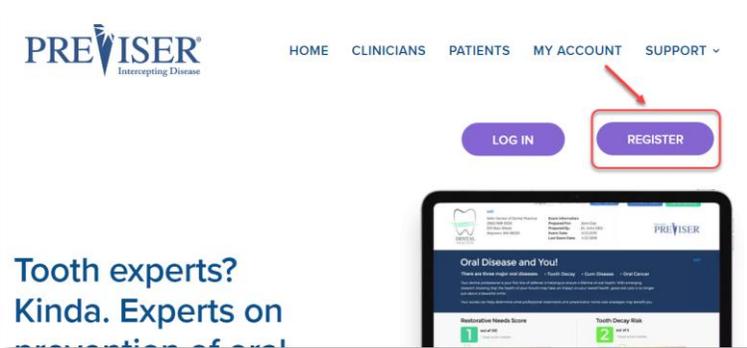
REGISTRATION

Start on the PreViser website:
<https://www.previser.com/>

Then click **Clinicians**.

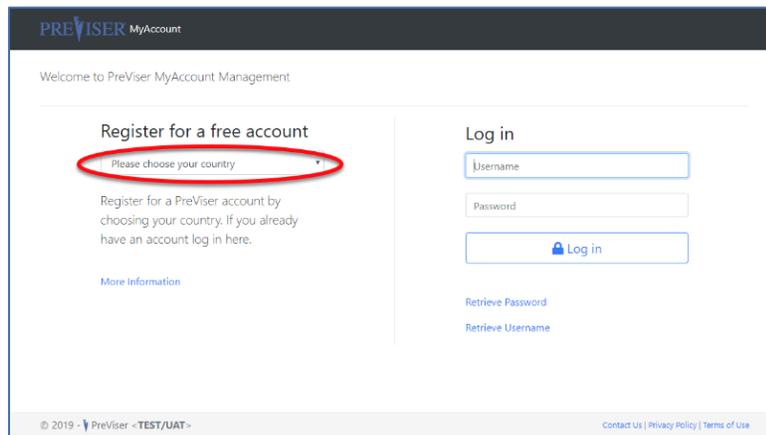


Click **Get a free Account**.



A page asking you to choose your country is displayed.

Select the country in which you are located from then choose your country from the drop-down menu.



continued

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),

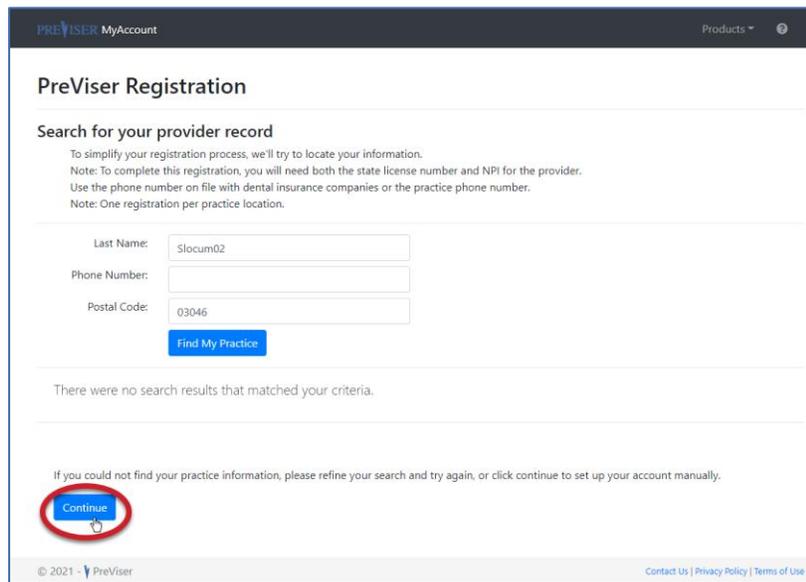
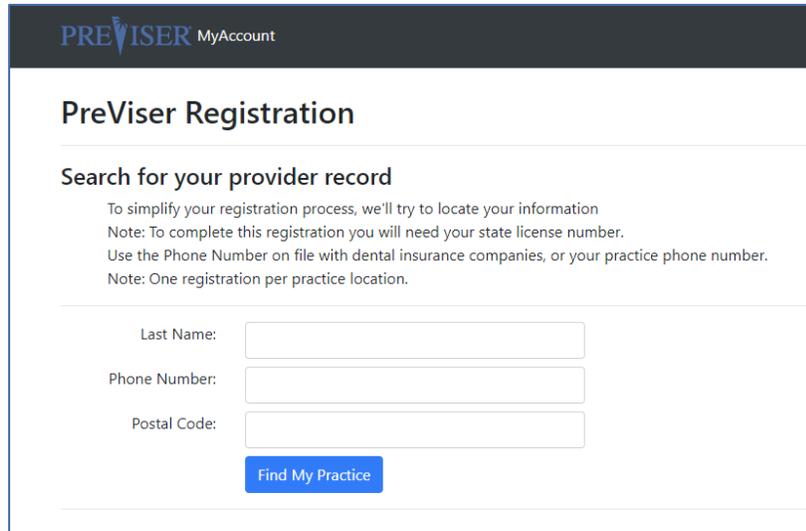
and/or

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.



continued

Fill in the fields, red asterisks indicate required fields.

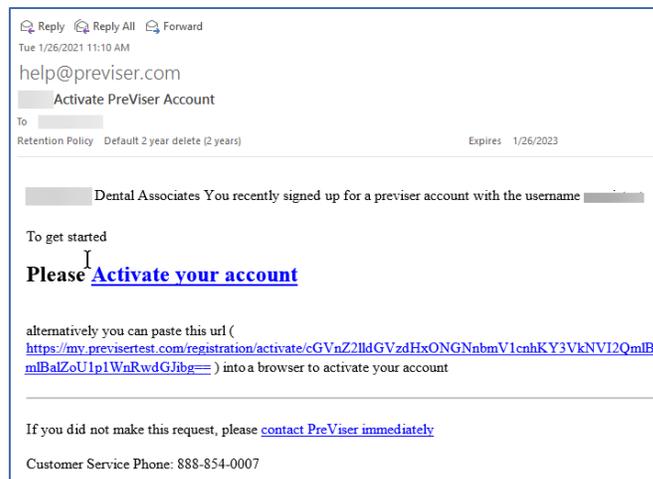
Add additional clinicians/users and be sure to check the [User has admin privileges](#) check box for each as appropriate.

Check the box to show you read and agree with the **End User License Agreement**.

Click **Complete Registration**.

You should shortly receive a verification containing your next step.

Click the link to complete your account activation.

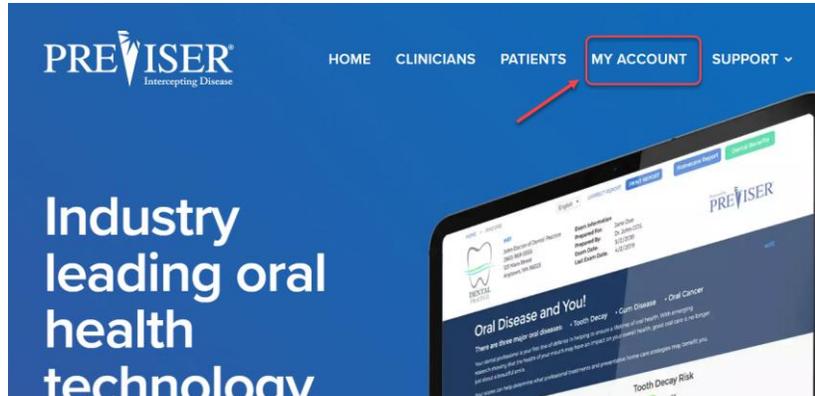


LOGGING IN

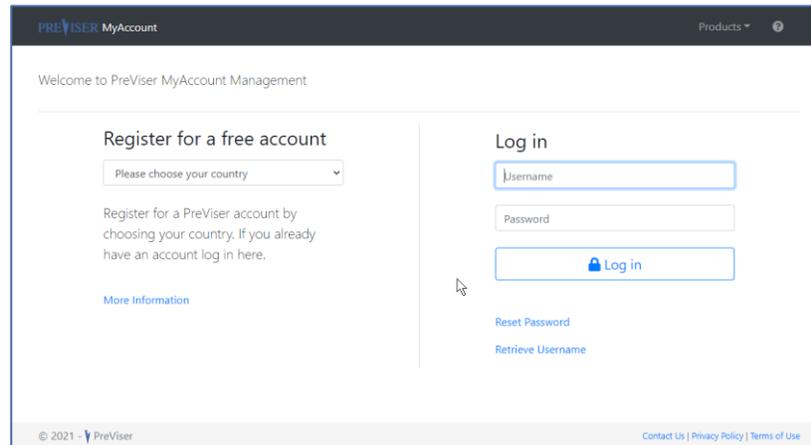
When logging in, you can start at the PreViser website: <https://www.previser.com/>, and click **My Account**

or type

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

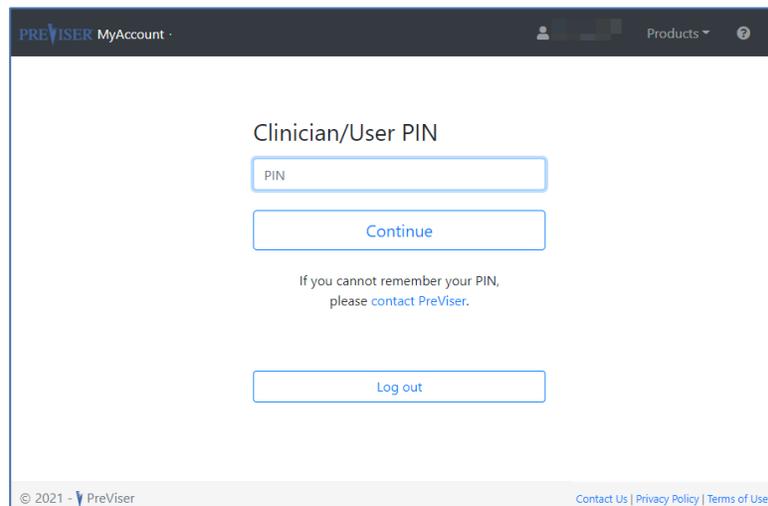


Log into PreViser's MyAccount with your username and password that was created during registration.



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.



BUSINESS ASSOCIATE AGREEMENT

SIGNING A BUSINESS ASSOCIATE AGREEMENT WITH PREVISER

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

Read the BAA.

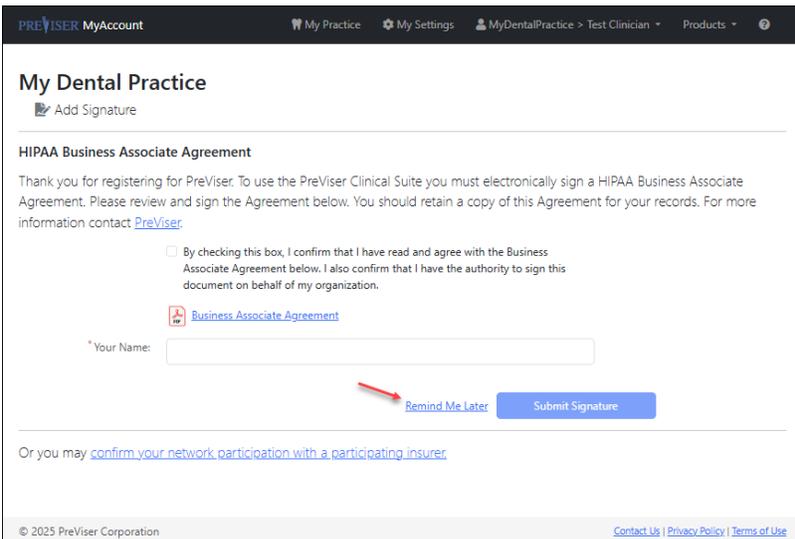
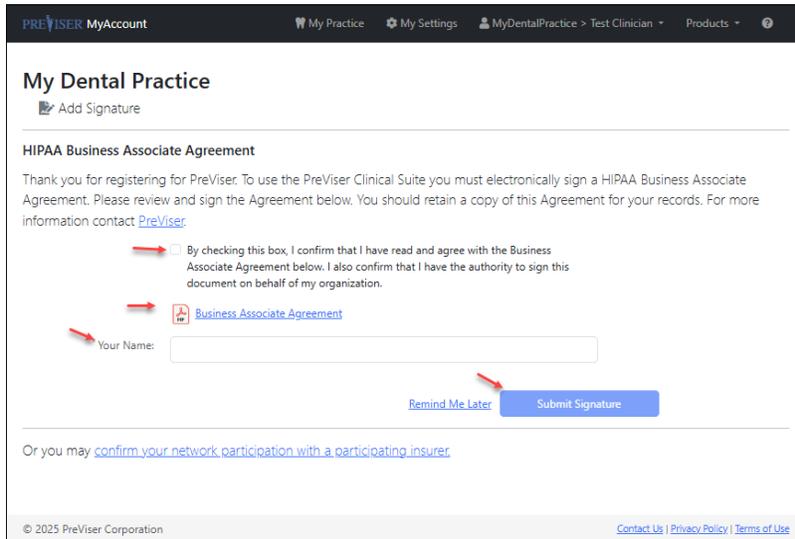
Check off the box stating you have read it.

Type your name (***only if you have the authority to do so on behalf of the practice***), and

Click **Submit Signature**.

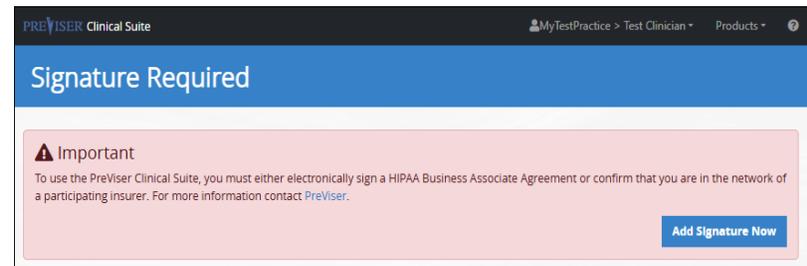
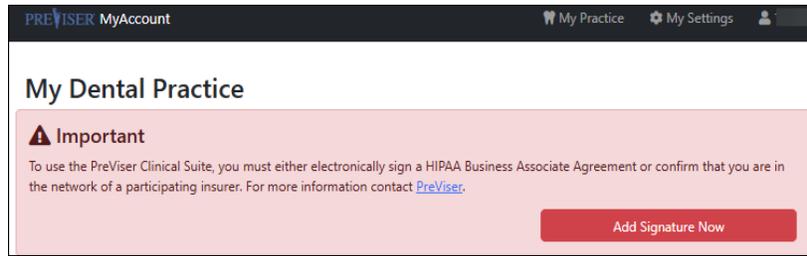
Note: If you choose to confirm your participation with a participating insurer, [go here](#).

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



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

These notices will be displayed until a BAA signature is provided.

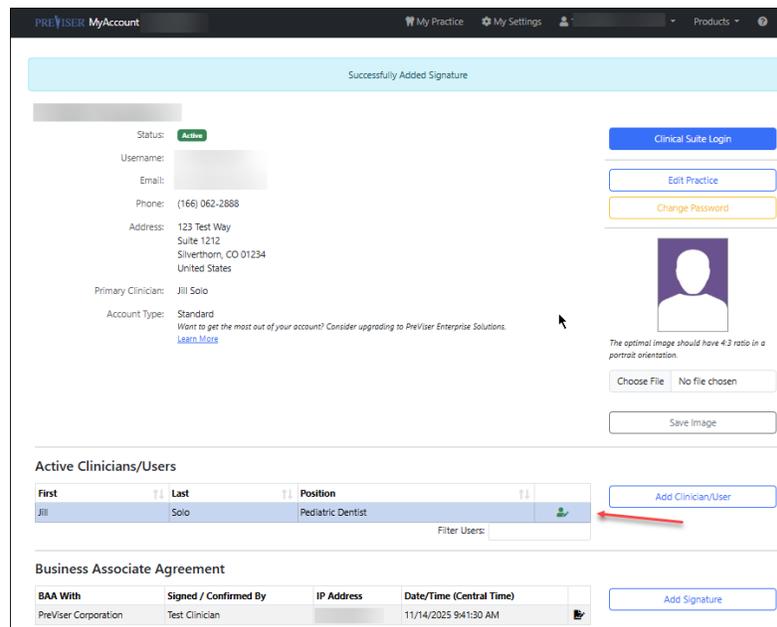


The following page will display a **Successfully Added Signature** message at the top.

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)

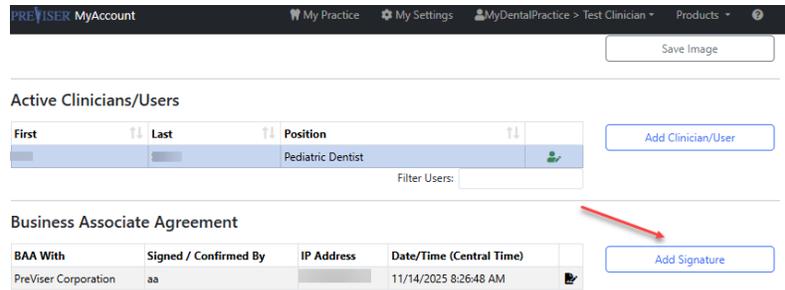


If the BAA was signed directly with PreViser, a successfully added signature automatically sends you an email with a PDF copy of the BAA attached.



At any time following the account registration, another BAA can be signed.

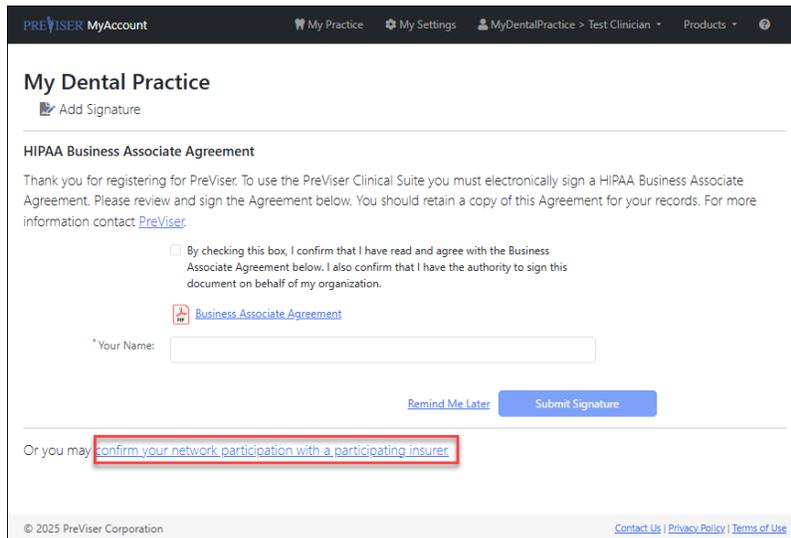
Select the **Add Signature** button to go to the *HIPAA Business Associate Agreement* page.



Then [go here](#) to sign a BAA directly with PreViser or [go here](#) to confirm your network participation with a participating insurer.

CONFIRM NETWORK PARTICIPATION

Click on the *'confirm my network participation with a participating insurer'* link.



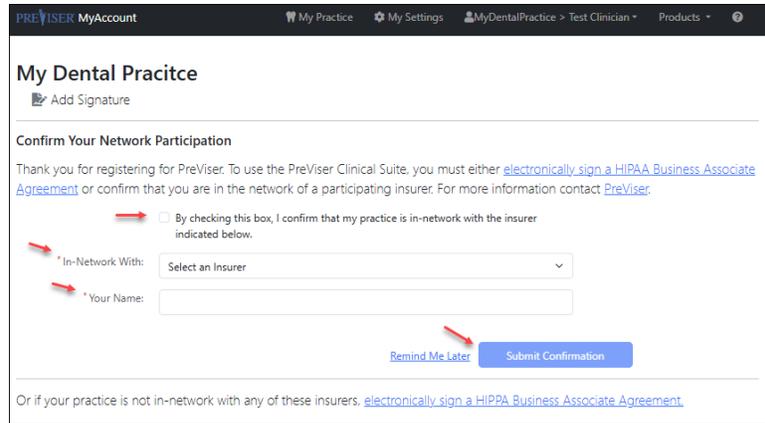
Select the insurer from the drop-down.

Check the box.

Type your name.

Click **Submit Signature**.

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



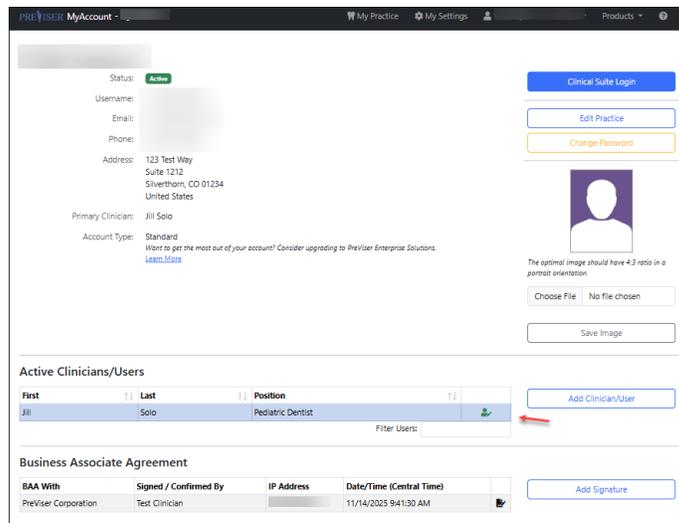
PRIMARY/ADMIN USERS

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 logs into MyAccount, this landing page displays:

Primary User/Admins can update the following account information:

- Practice address
- Practice phone number
- Practice logo
- Add clinicians/users and assign admin credentials
- Update PINs and user information.



Note: Whenever you make a change to your account, automatic emails are sent to notify you of the change.

From: help@previser.com
Date: February 2, 2021 at 1:39:27 PM EST
To: [REDACTED]
Subject: PreViser Account, Clinician Added

Your PreViser Practice Details have been updated

New Clinician Added
Name: I [REDACTED] R [REDACTED]

If you did not make this request, please [contact PreViser immediately](#)

Customer Service Phone: 888-854-0007

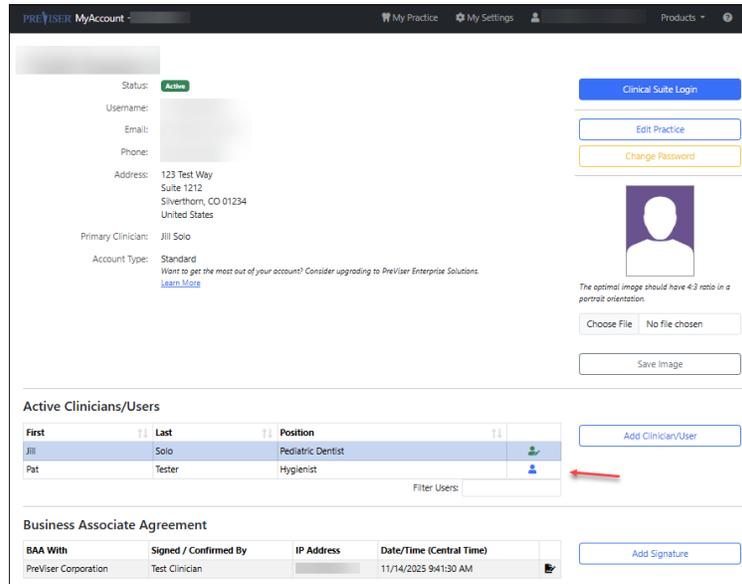
ADDITIONAL CLINICIANS/USERS

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 blue logo on the left side of the position column.

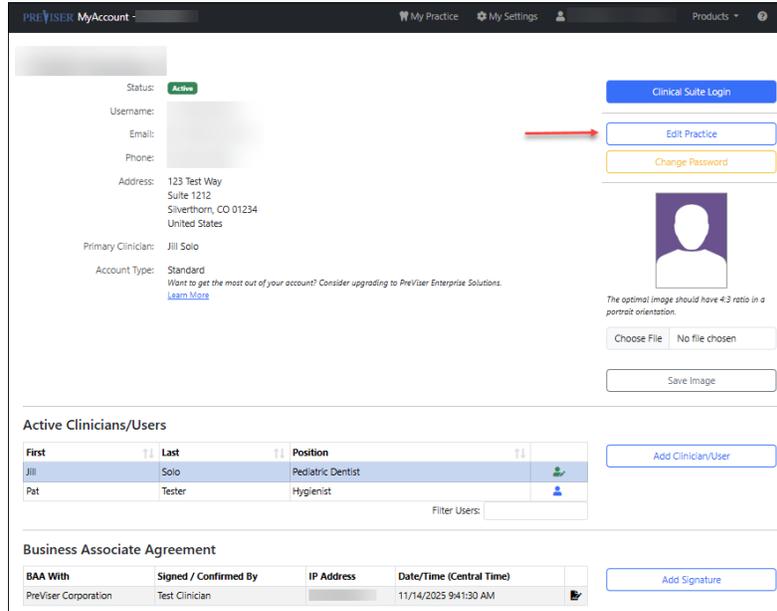
These users can access MyAccount with their own PINs, but do not have admin privileges to change the PINs or information of other users.



UPDATING YOUR ACCOUNT

EDIT PRACTICE

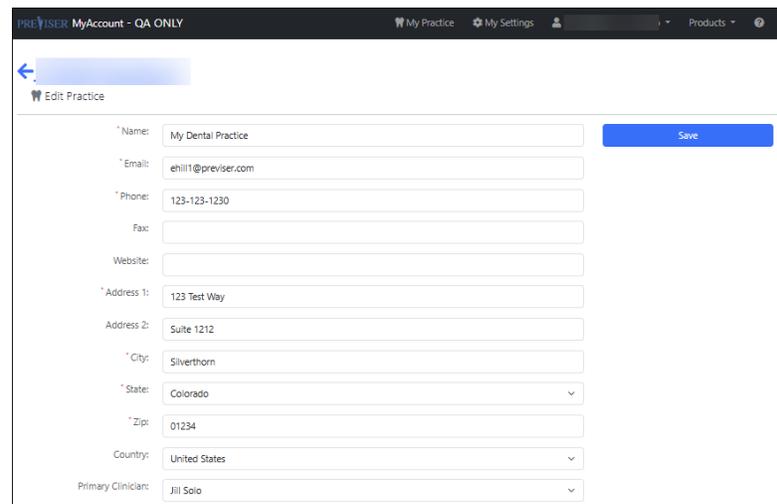
To make changes or updates to the account, log in and click **Edit Practice**.



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.



UPDATING PRIMARY CLINICIAN

The primary clinician can be updated on the *Edit Practice* screen.

For a clinician to be displayed in the **Primary Clinician** list, they need to be:

- A licensed clinician (have the NPI and license numbers populated)
- An Admin in PreViser

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**.

The screenshot shows the PreViser MyAccount interface. The top navigation bar includes 'PREVISER MyAccount', 'My Practice', 'My Settings', and 'Products'. The main content area is titled 'My Dental Practice' and shows a profile card with fields for Username, Email, Phone, and Address, all of which are redacted. A red arrow points to the 'Change Password' button in the top right corner. Below this is a modal window titled 'My Dental Practice' with a 'Change Password' sub-header. It contains two input fields: 'new password' and 'confirm password', followed by a blue 'Submit' button. Below the modal is a 'Business Associate Agreement' table with columns for 'BAA With', 'Signed / Confirmed By', 'IP Address', and 'Date/Time (Central Time)'. The table contains one entry for 'PreViser Corporation' signed on 2/2/2021. A footer contains copyright information and links for 'Contact Us', 'Privacy Policy', and 'Terms of Use'.

BAA With	Signed / Confirmed By	IP Address	Date/Time (Central Time)
PreViser Corporation	M S 02	50.237.40.162	2/2/2021 11:34:20 AM

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:

My Dental Practice

Status: Active

Username: 111320practice2
 Email: test@previser.com
 Phone: (123) 123-1230
 Address: 123 Test Way Suite 1212 Silverthorn, CO 01234 United States
 Primary Clinician: Jill Solo
 Account Type: Standard
Want to get the most out of your account? Consider upgrading to PreViser Enterprise Solutions. [Learn More](#)

Image Upload Section:
 The optimal image should have 4:3 ratio in a portrait orientation.
 Choose File (No file chosen) | Save Image | Remove Image

Active Clinicians/Users

First	Last	Position
Additional	Clinician	Orthodontist
Jill	Solo	Pediatric Dentist
Pat	Tester	Hygienist

Filter Users:

Business Associate Agreement

BAA With	Signed / Confirmed By	IP Address	Date/Time (Central Time)
PreViser Corporation	Test Clinician	192.168.237.8	11/14/2025 9:41:30 AM

Assessment for Pat Tester Perio

Not sent to patient email
 Assessment Report | Share

My Dental Practice
 (123) 123-1230
 123 Test Way Suite 1212
 Silverthorn, CO 01234

Exam Information
 Prepared For: Pat Tester
 Prepared By: Jill Solo
 Exam Date: 11/17/2025
 Submitted To: No Insurer Selected | 11/17/2025 6:22 AM

Home Care Report | Clinical Inputs

Gum Disease and You.
 Knowing your gum health scores is the first step in improving, or maintaining, the health of your gums. Here are other simple steps you can take:

- Talk to your dentist about managing any factors that contribute to elevated risk of disease.
- Ask your dentist how gum disease may impact other serious health ailments such as heart disease, Alzheimer's, strokes and diabetes.

Gum Disease Risk Score | **Gum Disease Score**
 1 out of 5 | 1 out of 100

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 account by clicking the **Add Clinician/User** button.

The list of all active users who have been added under the account displays below the Active Clinicians/Users heading.

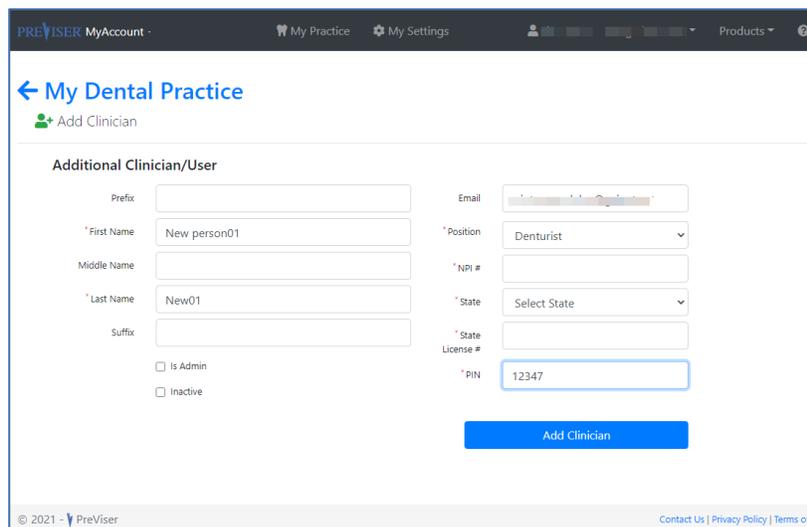
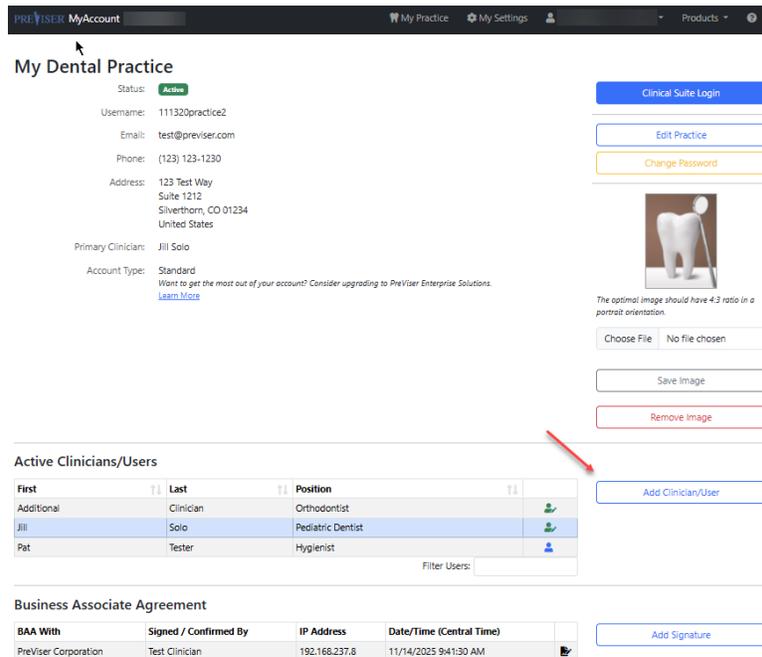
(If you have inactive users, a **Show Inactive (#)** button displays under the Add Clinician/User button.

Click **Add Clinician/User**.

Simply fill in the information, create a unique PIN for that user, and click **Add Clinician** at the bottom.

Note: If the additional users are licensed dentists or independent practitioners, NPI#, primary practice State, and State License# are required.

These fields will not display for additional users who are not licensed dentists or other independent practitioners.



CHANGING PINS/PERSONAL INFORMATION

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

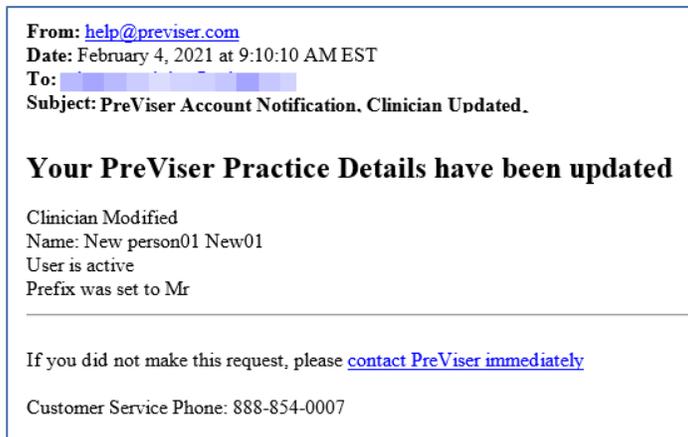
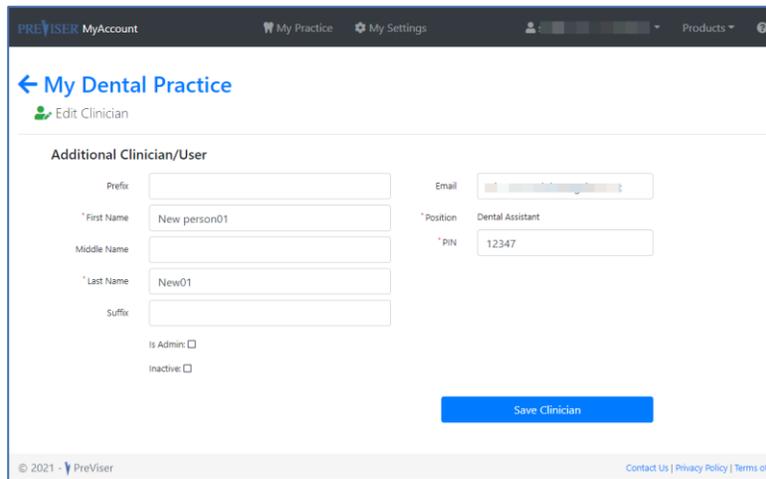
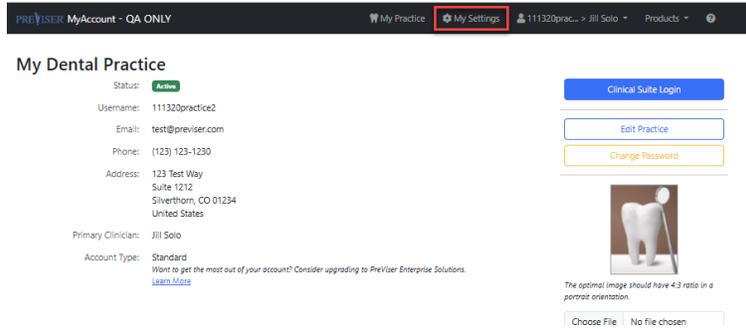
Note: [Admin/Primary Users](#) can make changes to other users' information by clicking any user's name from the list of clinicians.

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.



IS ADMIN AND INACTIVE CHECK BOXES

A major difference for the [Admin/Primary User](#) versus other users is 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 oversee updating the email address, phone number, picture, etc. within the account.

Inactive is used when you wish to 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 the inactive users, simply click **Show Inactive**.

To return to active users, click **Show Active**.

Active Clinicians/Users

First	Last	Position	
Marg	S...	X-ray Clinic Technician	
New person01	New01	Dental Assistant	

Buttons: Add Clinician/User, Show Inactive (1)

Inactive Clinicians/Users

First	Last	Position	
Isabelle	R...	Office Staff	

Buttons: Add Clinician/User, Show Active (2)

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 <https://my.previser.com> and do the following:

- #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 **Admin** Clinician who is the new Primary Dentist
- #4) change the primary clinician for the practice to the newly created clinician following [these steps](#).

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: <https://www.previser.com/support/contact-us/>

My Dental Practice

Status: Active

Username: 111320practice2

Email: test@previser.com

Phone: (123) 123-1230

Address: 123 Test Way
Suite 1212
Silverthorn, CO 01234
United States

Primary Clinician: Jill Solo

Account Type: Standard
Want to get the most out of your account? Consider upgrading to PreViser Enterprise Solutions.
[Learn More](#)

1 → [Edit Practice](#)

2 → [Change Password](#)

3 → [Add Clinician/User](#)

Active Clinicians/Users

First	Last	Position	
Additional	Clinician	Orthodontist	
Jill	Solo	Pediatric Dentist	
Pat	Tester	Hygienist	

Filter Users:

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.

My Dental Practice

Status: Active

Username: 111320practice2

Email: test@previser.com

Phone: (123) 123-1230

Address: 123 Test Way
Suite 1212
Silverthorn, CO 01234
United States

Primary Clinician: Jill Solo

Account Type: Standard
Want to get the most out of your account? Consider upgrading to PreViser Enterprise Solutions.
[Learn More](#)

Clinical Suite Login (highlighted with red arrow)

Edit Practice

Change Password



The optimal image should have 4:3 ratio in a portrait orientation.

Choose File No file chosen

Save Image

Remove Image

Active Clinicians/Users

First	Last	Position	
Additional	Clinician	Orthodontist	
Jill	Solo	Pediatric Dentist	
Pat	Tester	Hygienist	

Filter Users:

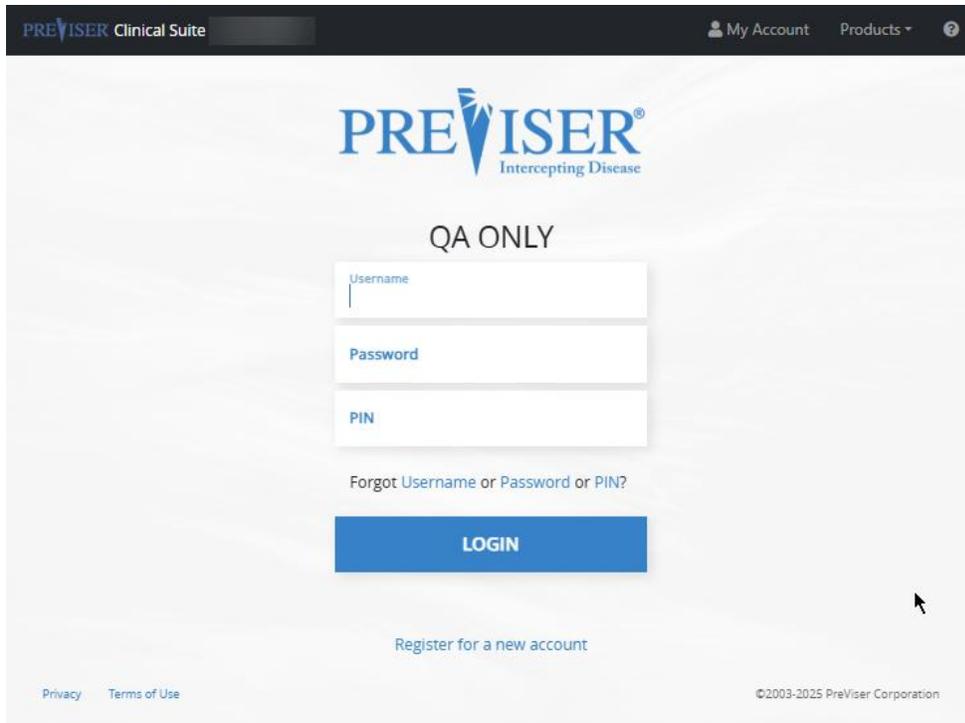
Add Clinician/User

Business Associate Agreement

BAA With	Signed / Confirmed By	IP Address	Date/Time (Central Time)	
PreViser Corporation	Test Clinician	192.168.237.8	11/14/2025 9:41:30 AM	

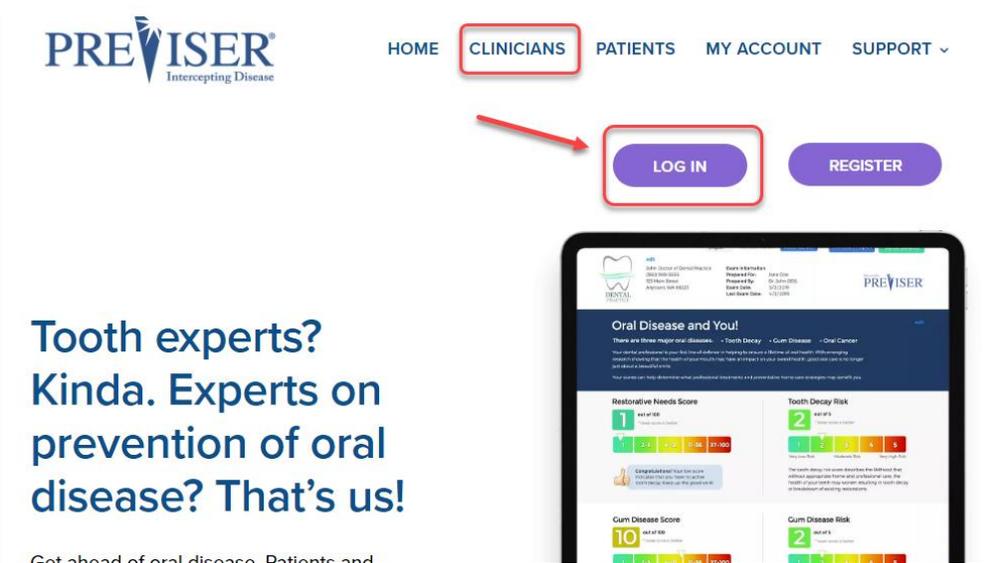
Add Signature

This will take you directly to the log in page:



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: <https://www.previser.com/>, then click **Clinicians**. Click on the **Login** button at the top of the **Clinicians** page:



See PreViser’s [Clinical Suite documentation](#) to learn more about the Clinical Suite.

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