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

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For further information, contact:  
[help@previser.com](mailto:help@previser.com)  
P: 888.854.0007

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#### HIPAA / HITECH

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#### Version History

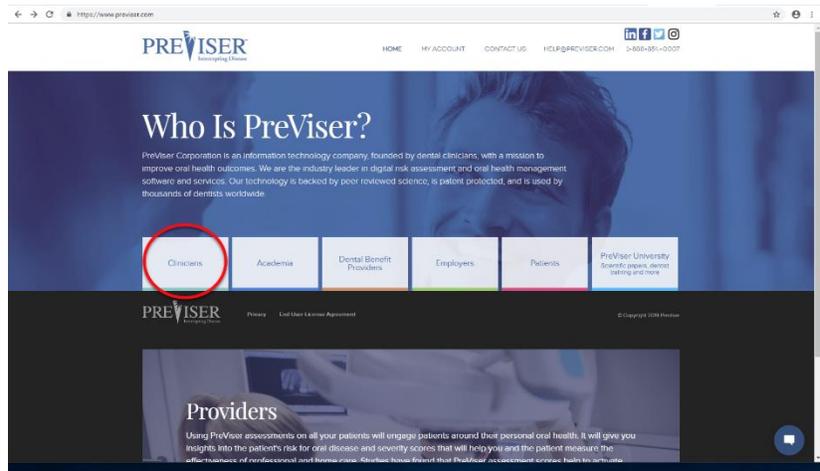
Revision Level	Date	Description
3.0	January 22, 2019	Original
3.1	March 12, 2019	Updated screenshots & 'inactive' wording.
3.2	February 21, 2020	From OHIS to Clinical Suite: Updated screenshots and wording.
3.3	April, 2020	Added BAA information
3.4	May, 2020	Updated screenshots

## Contents

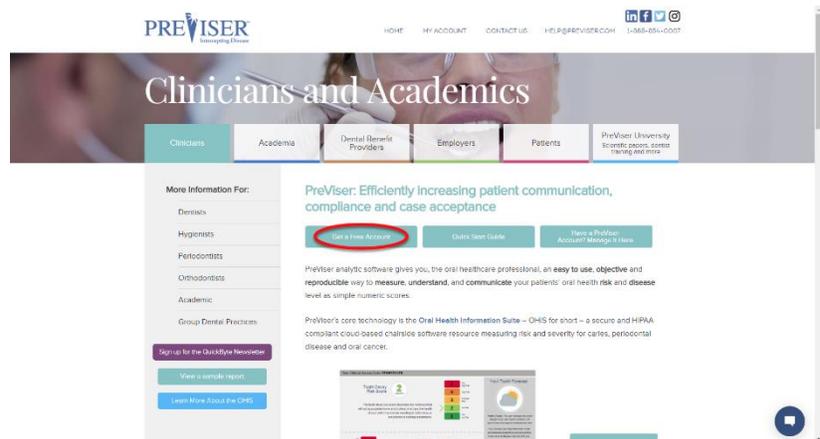
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## Registration

Start on the PreViser website:  
<https://www.previser.com/>. Then click on “Clinicians”.

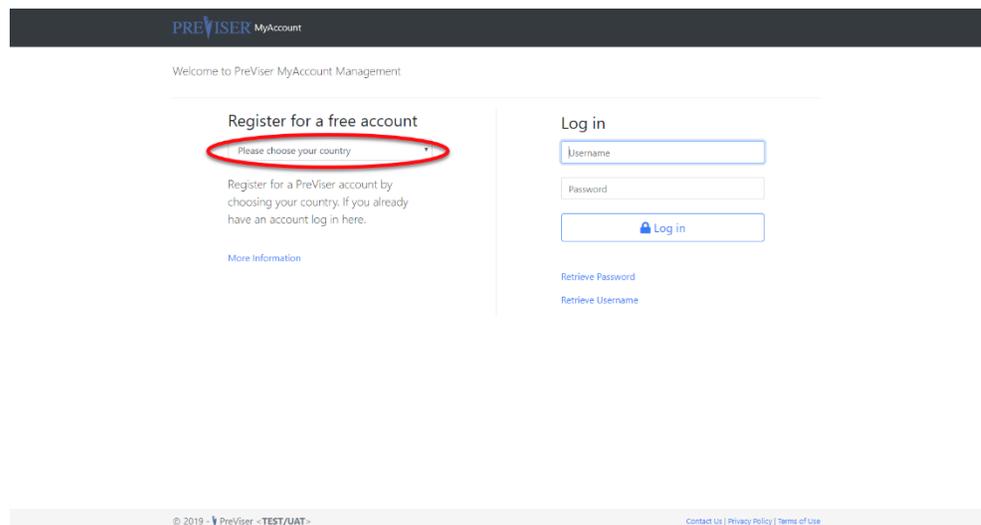


Click on “Get a Free Account”



You will be navigated to the following page:

Please select the country you are located in from the drop-down menu under where it says: “Register for a free account”.



You will then be navigated to a new screen where you will be able to search for your practice based on different criteria. Click “Find My Practice” after you have filled out that criteria.

The screenshot shows the 'PreViser Registration' header with the PreViser MyAccount logo. Below the header is the section 'PreViser Registration' with a sub-section 'Search for your provider record'. It includes instructions: 'To simplify your registration process, we'll try to locate your information. Note: To complete this registration you will need your state license number. Use the Phone Number on file with dental insurance companies, or your practice phone number. Note: One registration per practice location.' The form contains three input fields: 'Last Name:', 'Phone Number:', and 'Postal Code:'. A blue button labeled 'Find My Practice' is positioned below the fields.

If you were not able to find your practice, click “Continue” at the bottom of the screen to set up your account manually.

This screenshot shows the search results for the 'Find My Practice' search. It includes the same header and instructions as the previous screenshot. The search results are displayed in a table with columns: 'First', 'Last', 'Practice', 'Address', and 'Phone'. One result is shown with 'O'CONNOR' in the 'Last' column. Below the table, there is a link that says 'Select a search result to continue.' At the bottom, a message reads: 'If you could not find your practice information, please refine your search and try again, or click continue to set up your account manually.' A red circle highlights a 'Continue' button at the bottom of the page.

You will be navigated to a new page, fill out the criteria below:

The screenshot shows the 'PreViser Registration' header with the PreViser MyAccount logo. Below the header is the section 'PreViser Registration'. The form is divided into two sections. The first section contains three input fields: 'Username', 'Password', and 'Confirm Password'. The second section contains several input fields: 'Practice Name', 'Phone', 'Fax', 'Account Email', 'Website', 'Address', 'Address 2', 'City', 'State' (a dropdown menu with 'Select State' selected), 'Zip', and 'Country' (a dropdown menu with 'United States' selected).

**Primary Clinician**

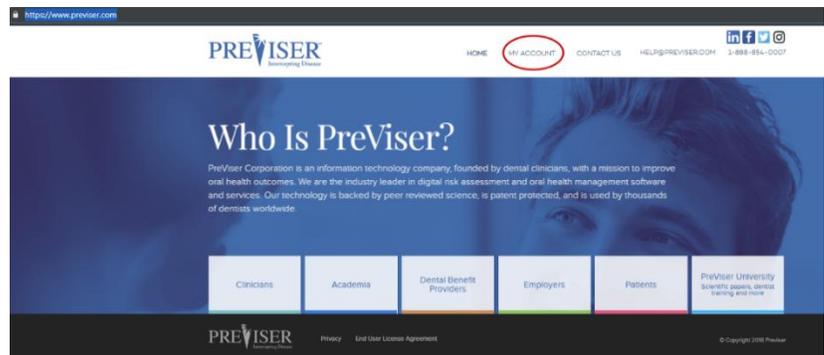
Prefix	<input type="text"/>	Email	<input type="text"/>
First Name	<input type="text"/>	Position	Select Position ▼
Middle Name	<input type="text"/>	PIN	<input type="text"/>
Last Name	<input type="text"/>		
Suffix	<input type="text"/>		

Click “Complete Registration” at the bottom when finished. You should shortly receive a verification email with your next steps.

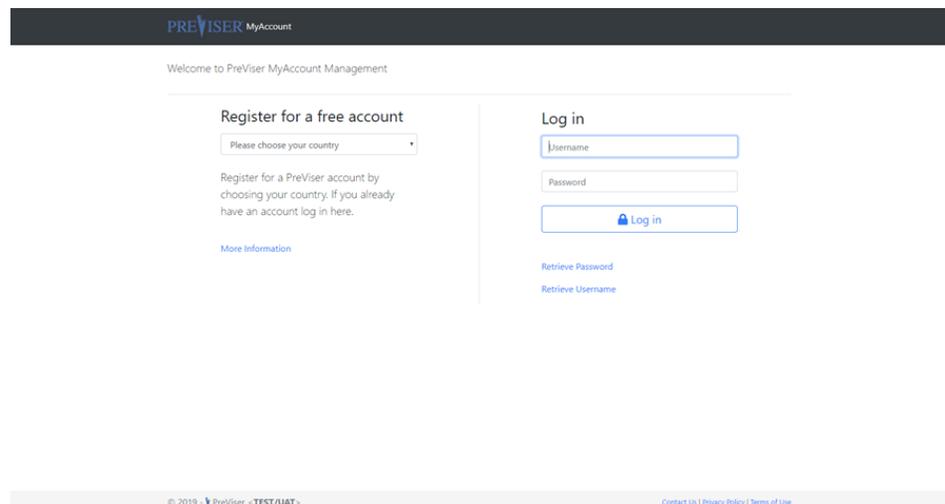
## Logging In

When logging in, you can start at the PreViser website:

<https://www.previser.com/>, click on “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:



You will then type in the PIN number that you created when first registering for the account. This is a 5-digit number. Then click "Continue". You will then be logged in.

Text to introduce previser MyAccount and brief information about OHIS.

### Clinician PIN

53535

Continue

Sign out

## Business Associate Agreement

### Confirm Network Participation

When first logging in, the following screen will appear:

PREVISER MyAccount My Practice My Settings Log Out Products ?

## Mariya Test 2

[Add Signature](#)

### Confirm Your Network Participation

Thank you for registering for PreViser. To use the PreViser Clinical Suite you must confirm that you are in the network of a participating insurer or electronically sign a HIPAA Business Associate Agreement. For more information contact [PreViser](#).

By checking this box, I confirm that my practice is in-network with the insurer indicated below.

In-Network With:

Your Name:

[Remind Me Later](#) [Submit Confirmation](#)

Or if your practice is not in-network with any of these insurers, [then go here](#)

The new account provider will be asked to either confirm network participation with an insurance co viewed in the dropdown list OR asked to enter into a BAA directly with PreViser.

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

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

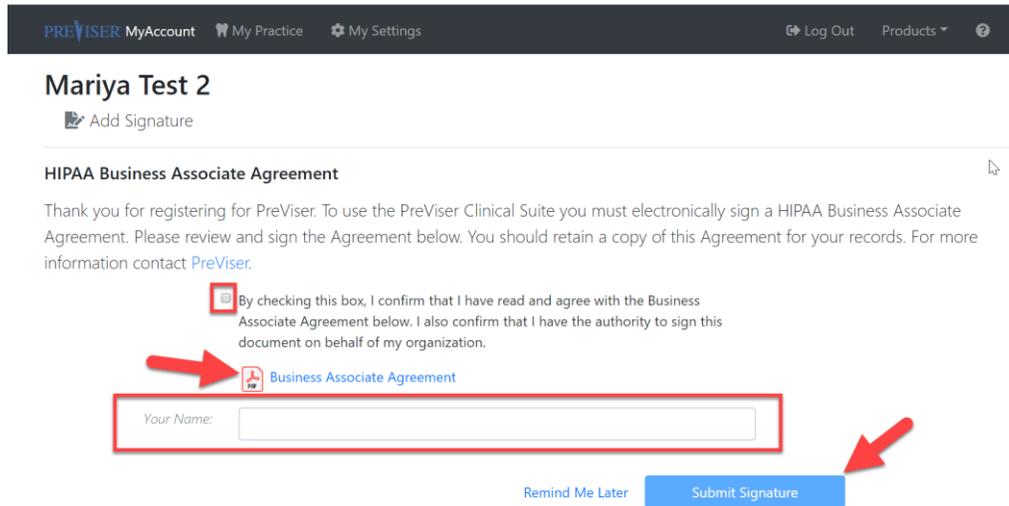
The following images will appear at the top and bottom of the page until a BAA is signed:

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

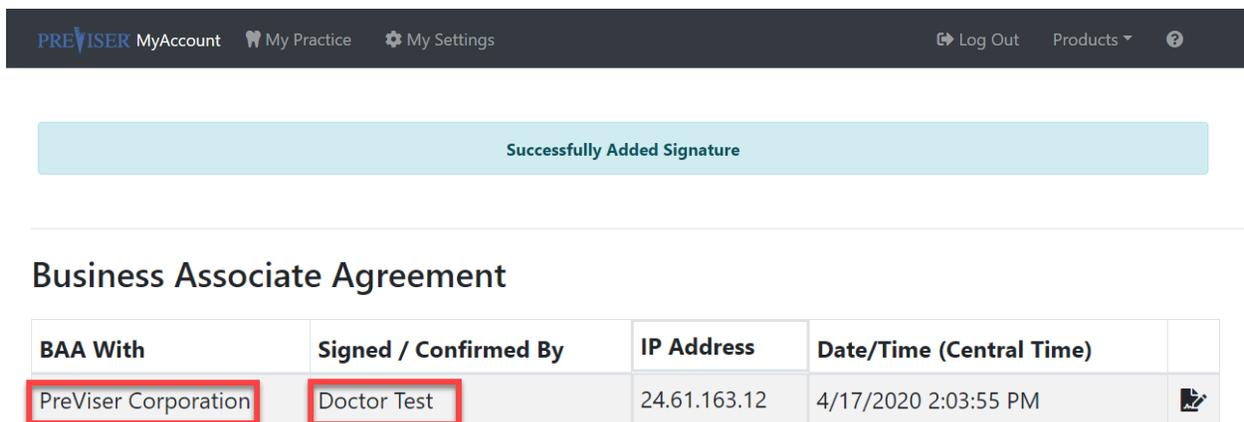
### Signing a Business Associate Agreement with PreViser:

Select any of the “Add Signature” buttons and be taken to the following page. Scroll to the bottom of the screen, and click on “then go here” to sign a BAA directly with PreViser.

Read over the Business Associate Agreement, check off the box stating you have read over it, sign your name (**\*again, only if you have the authority to do so on behalf of the practice\***), and ‘Submit Signature’.



The following will appear at the top and bottom of the screen:



## Primary/Admin Users

### Primary/Admin User

The Primary 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 left side of the position column.

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

When a Primary/Admin User logs into MyAccount, they will be able to view the following screen:

**Mariya QA Test**  
 Status: Active  
 Username: MariyaQATest  
 Email: [Redacted]  
 Phone: (463) 789-3453  
 Address: 12 Test Ln, Denver, CO 09812, United States  
 PreViser Enterprise: Yes  
 Early Adopter: Yes

[Clinical Suite Login](#)  
[Edit Practice](#)  
[Reset Password](#)



**Active Clinicians/Users**

First	Last	Position	
Mariya	Test	General Dentist	
Ryan	Lunn	Hygienist	
Becca	Smith	Office Staff	

[Add Clinician/User](#)

**Business Associate Agreement**

BAA With	Signed / Confirmed By	IP Address	Date/Time (Central Time)	
PreViser Corporation	Mariya	24.61.163.12	3/17/2020 12:46:47 PM	

[Add Signature](#)

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## Additional Clinicians/Users

**Additional Clinicians/Users** are the clinicians/users that are added to the account. Additional users that do not have admin privileges will appear on this list with a black logo on the left side of the position column. These users can access MyAccount with their own PINs, but do not have admin privileges to change the PINs or information of other users. Additional Clinicians/Users without admin privileges will see:

**Mariya QA Test**  
 Status: Active  
 Username: MariyaQATest  
 Email: [Redacted]  
 Phone: (463) 789-3453  
 Address: 12 Test Ln, Denver, CO 09812, United States  
 PreViser Enterprise: Yes  
 Early Adopter: Yes

[Clinical Suite Login](#)



**Active Clinicians/Users**

First	Last	Position	
Mariya	Test	General Dentist	
Ryan	Lunn	Hygienist	
Becca	Smith	Office Staff	

**Business Associate Agreement**

BAA With	Signed / Confirmed By	IP Address	Date/Time (Central Time)	
PreViser Corporation	Mariya	24.61.163.12	3/17/2020 12:46:47 PM	

[Add Signature](#)

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## Updating Your Account

After logging in, to make changes or updates to the account, click “Edit Practice”.

**Mariya QA Test**

Status: Active

Username: MariyaQATest

Email: [Redacted]

Phone: (463) 789-3453

Address: 12 Test Ln.  
Denver, CO 09812  
United States

PreViser Enterprise: Yes

Early Adopter: Yes

[Clinical Suite Login](#)

[Edit Practice](#)

[Reset Password](#)

[Choose image](#) [Browse](#)

[Save Image](#)

[Remove Image](#)

**Active Clinicians/Users**

First	Last	Position	
Mariya	Test	General Dentist	
Ryan	Lunn	Hygienist	
Becca	Smith	Office Staff	

[Add Clinician/User](#)

**Business Associate Agreement**

BAA With	Signed / Confirmed By	IP Address	Date/Time (Central Time)	
PreViser Corporation	Mariya	24.61.163.12	3/17/2020 12:46:47 PM	

[Add Signature](#)

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This is where you have the option to update all of your account information. That includes practice name, email address, phone number, and more. However, the username for the account chosen at the time of registration cannot be changed. Click the blue “Save” button when all desired changes are made.

[← Mariya QA Test](#)

[Edit Practice](#)

Name:  [Save](#)

Email:

Phone:

Fax:

Website:

Address 1:

Address 2:

City:

State:

Zip:

Country:

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## 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. You can upload that image by clicking Browse, navigating to the location on your computer of the image you wish to display, selecting that image and clicking SAVE. The image must be in \*.jpeg, \*.png, or \*.gif format and less than 10 MB in size.

**Mariya QA Test**  
Status: Active  
Username: MariyaQATest  
Email: [redacted]  
Phone: (463) 789-3453  
Address: 12 Test Ln., Denver, CO 09812, United States  
PreViser Enterprise: Yes  
Early Adopter: Yes

**Active Clinicians/Users**

First	Last	Position	
Mariya	Test	General Dentist	
Ryan	Lunn	Hygienist	
Becca	Smith	Office Staff	

**Business Associate Agreement**

BAA With	Signed / Confirmed By	IP Address	Date/Time (Central Time)
PreViser Corporation	Mariya	24.61.163.12	3/17/2020 12:46:47 PM

Once selected and saved the image will appear here on the patient report:

Assessment for Tom Abed  
**Caries**

Mariya QA Test  
(463) 789-3453  
12 Test Ln.  
Denver, CO 09812

**Exam Information**  
Prepared For: Tom Abed  
Prepared By: Mariya Test  
Exam Date: 05/29/2020  
Submitted To: PreViser QA 05/29/2020 3:17 PM

**Tooth Health and You.**  
Knowing your risk of tooth decay and the current health of your teeth is the first step in maintaining or improving the health of your teeth. Here are the other simple steps you can take

## Adding New Users/PINs

After creating your account, you will be able to add other users with their own individual PIN numbers. As the Primary User/Admin, you can add other users to the account by clicking the "Add Clinician/User" button.

**Mariya QA Test**  
 Status: Active  
 Username: MariyaQATest  
 Email: [redacted]  
 Phone: (463) 789-3453  
 Address: 12 Test Ln., Denver, CO 09812, United States  
 PreViser Enterprise: Yes  
 Early Adopter: Yes

**Active Clinicians/Users**

First	Last	Position	
Mariya	Test	General Dentist	
Ryan	Lunn	Hygienist	
Becca	Smith	Office Staff	

**Business Associate Agreement**

BAA With	Signed / Confirmed By	IP Address	Date/Time (Central Time)	
PreViser Corporation	Mariya	24.61.163.12	3/17/2020 12:46:47 PM	

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The list of all other users under the account are listed towards the bottom of the page; If this is the first time you have accessed this new area of functionality, you will not see many users besides the people that were added during registration:

After clicking "Add Clinician," a new screen appears. Simply fill in the criteria that is being asked, create a PIN for that user, and click "Add Clinician" at the bottom:

### ← Mariya QA Test

Add Clinician

#### Additional Clinician/User

Prefix	<input type="text"/>	Email	<input type="text"/>
First Name	<input type="text"/>	Position	Select Position
Middle Name	<input type="text"/>	PIN	<input type="text"/>
Last Name	<input type="text"/>		
Suffix	<input type="text"/>		
<input type="checkbox"/> Is Admin <input type="checkbox"/> Inactive			

**Add Clinician**

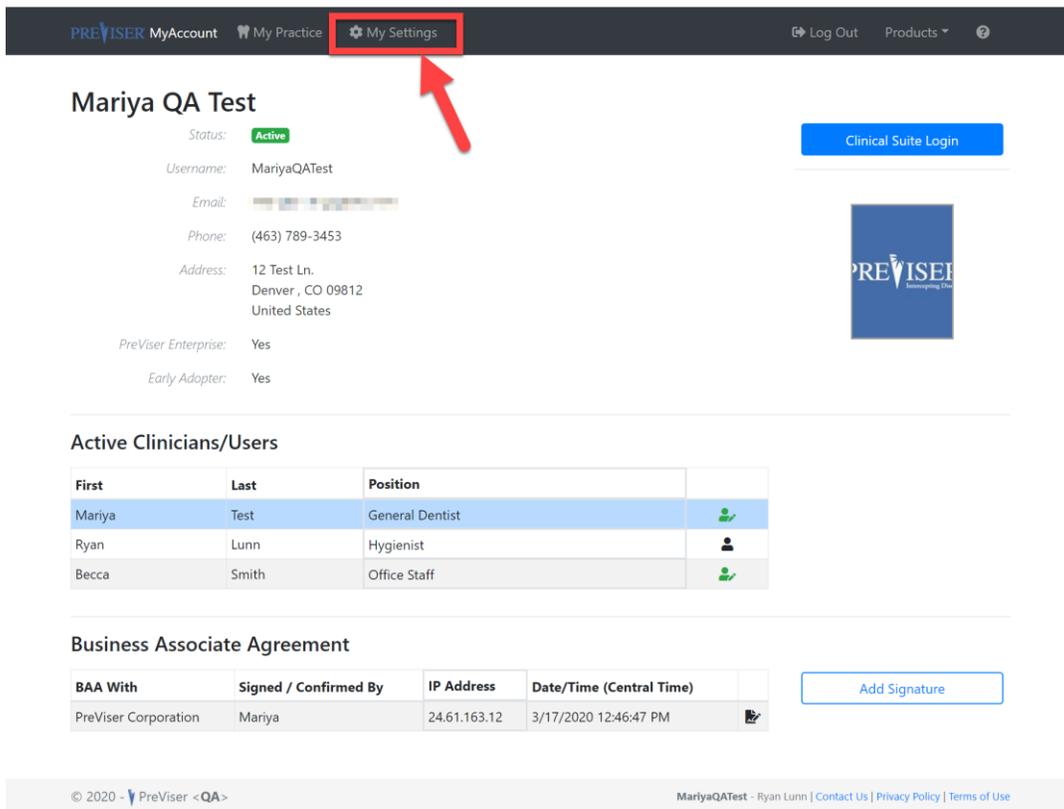
To be HIPAA compliant, an individual PIN should be assigned to anyone who has access to the OHIS and can touch patient records, as demonstrated above.

*Note: for additional Users who are not licensed dentists or other independent practitioners, Primary Practice State and State License # is not required and will not display. If the Additional Users are licensed dentists or independent practitioners, primary practice state and license number is required. Create a PIN for each User who you wish to have OHIS access and distribute those PINs to those team members.*

## Changing PINs/Personal Information:

Any user (Admin or not) can log in with their PIN and change their PIN and their personal information. Simply click on “My Settings” at the top.

Admin/Primary Users can make changes to other user information by clicking on any user’s name from the list of clinicians.



The screenshot shows the PreViser MyAccount interface. The top navigation bar includes 'PREVISER MyAccount', 'My Practice', and 'My Settings' (highlighted with a red box and arrow). Below the navigation, the user profile for 'Mariya QA Test' is displayed, including status (Active), username, email, phone, address, and enterprise/adopter status. A 'Clinical Suite Login' button is visible. Below the profile is a table of 'Active Clinicians/Users' with columns for First, Last, Position, and a status icon. The table lists Mariya Test (General Dentist), Ryan Lunn (Hygienist), and Becca Smith (Office Staff). At the bottom, there is a 'Business Associate Agreement' table with columns for BAA With, Signed / Confirmed By, IP Address, and Date/Time (Central Time). The table shows an agreement with PreViser Corporation signed by Mariya on 3/17/2020 at 12:46:47 PM. An 'Add Signature' button is also present.

First	Last	Position	
Mariya	Test	General Dentist	
Ryan	Lunn	Hygienist	
Becca	Smith	Office Staff	

BAA With	Signed / Confirmed By	IP Address	Date/Time (Central Time)	
PreViser Corporation	Mariya	24.61.163.12	3/17/2020 12:46:47 PM	

You will be taken to the following screen. Simply makes any changes necessary and click “Save Clinician”. Unless that user has been given admin privileges, they will not have the ability to make changes within the “Is Admin” or “Inactive” options.

PREVISER MyAccount My Practice My Settings Log Out Products ?

← Mariya QA Test

Edit Clinician

**Additional Clinician/User**

Prefix

First Name

Middle Name

Last Name

Suffix

Is Admin:

Inactive:

Email

Position

PIN

Save Clinician

A major difference for the Admin/Primary User versus other users are the “**Is Admin**” and “**Inactive**” options:

PREVISER MyAccount My Practice My Settings Log Out Products ?

← Mariya QA Test

Edit Clinician

**Additional Clinician/User**

Prefix

First Name

Middle Name

Last Name

Suffix

Is Admin:

Inactive:

Email

Position

PIN

Save Clinician

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

“**Inactive**” is used when you wish to temporarily suspend OHIS access to a team member. *Note: Please note, if the User is associated with a prior OHIS assessment and has been made “inactive,” the assessment history associating that clinician with the patient will be preserved.*

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

**Mariya QA Test**  
 Status: Active  
 Username: MariyaQATest  
 Email: [Redacted]  
 Phone: (463) 789-3453  
 Address: 12 Test Ln., Denver, CO 09812, United States  
 PreViser Enterprise: Yes  
 Early Adopter: Yes

[Clinical Suite Login](#)  
[Edit Practice](#)  
[Reset Password](#)

PREVISER  
 Choose image Browse  
 Save Image  
 Remove Image

**Active Clinicians/Users**

First	Last	Position	
Mariya	Test	General Dentist	
Ryan	Lunn	Hygienist	

[Add Clinician/User](#)  
[Show Inactive \(1\)](#)

**Business Associate Agreement**

BAA With	Signed / Confirmed By	IP Address	Date/Time (Central Time)
PreViser Corporation	Mariya	24.61.163.12	3/17/2020 12:46:47 PM

[Add Signature](#)

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To go back to active users, click 'Show Active' button.

**Inactive Clinicians/Users**

First	Last	Position	
Becca	Smith	Office Staff	

[Add Clinician/User](#)  
[Show Active \(2\)](#)

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.

**Mariya QA Test**  
 Status: Active  
 Username: MariyaQATest  
 Email: [Redacted]  
 Phone: (463) 789-3453  
 Address: 12 Test Ln., Denver, CO 09812, United States  
 PreViser Enterprise: Yes  
 Early Adopter: Yes

**Active Clinicians/Users**

First	Last	Position	
Mariya	Test	General Dentist	
Ryan	Lunn	Hygienist	

**Business Associate Agreement**

BAA With	Signed / Confirmed By	IP Address	Date/Time (Central Time)
PreViser Corporation	Mariya	24.61.163.12	3/17/2020 12:46:47 PM

**Buttons:** Clinical Suite Login, Edit Practice, Reset Password, Add Clinician/User, Show Inactive (1), Add Signature

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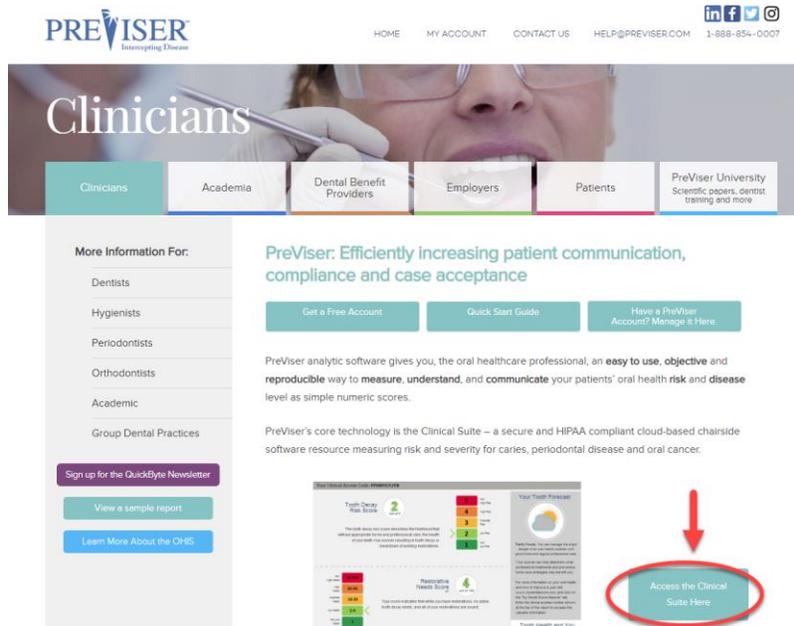
OR You can start on the PreViser website: <https://www.previser.com/>, then click 'Clinicians'.

**Who Is PreViser?**  
 PreViser Corporation is an information technology company, founded by dental clinicians, with a mission to improve oral health outcomes. We are the industry leader in digital risk assessment and oral health management software and services. Our technology is backed by peer reviewed science, is patent protected, and is used by thousands of dentists worldwide.

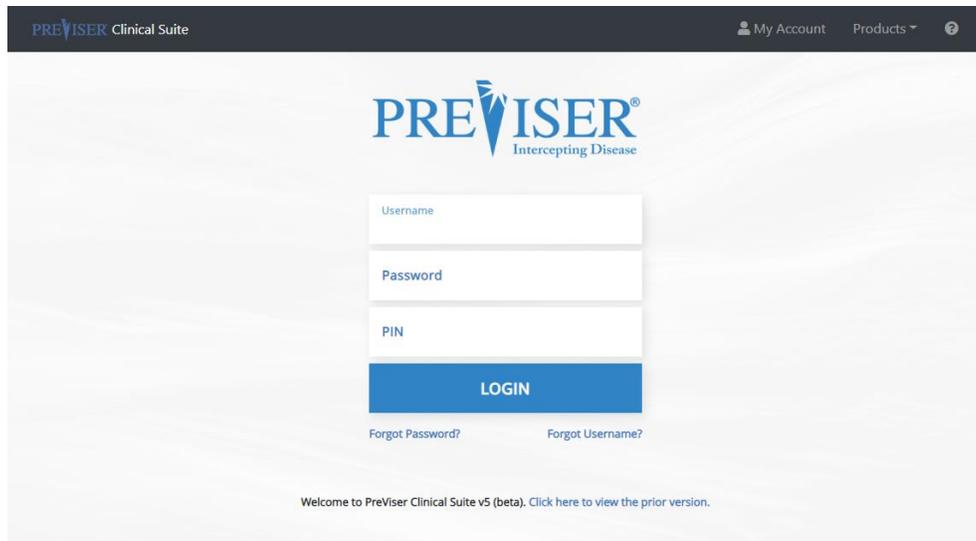
**Navigation:** Home, My Account, Contact Us, Help@PREVISER.COM, 1-888-854-0007

**Providers**  
 Using PreViser assessments on all your patients will engage patients around their personal oral health. It will give you insights into the patient's risk for oral disease and severity scores that will help you and the patient measure the effectiveness of non-surgical and home care. Studies have found that PreViser assessment scores help to activate

Scroll down the page and click 'Access the Clinical Suite Here'.



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.



See PreViser’s Clinical Suite documentation to learn more about the Clinical Suite here:  
<https://free.previser.com/downloads/>