



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

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HIPAA / HITECH

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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 <i>Enterprise Features</i> 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.

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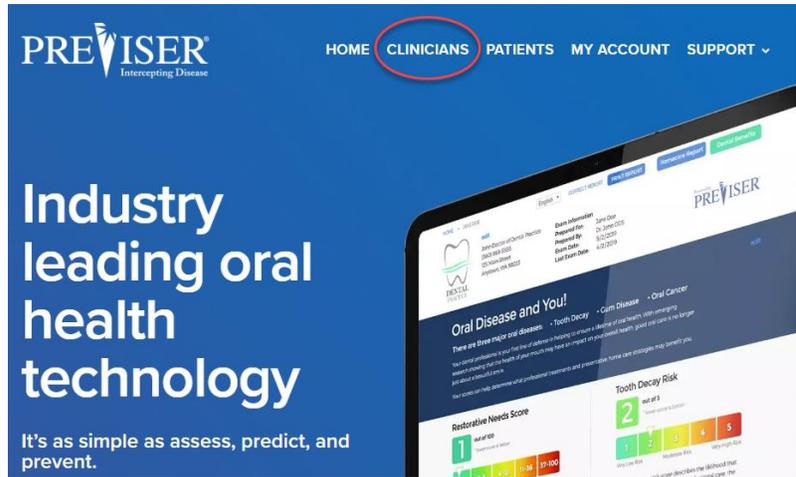
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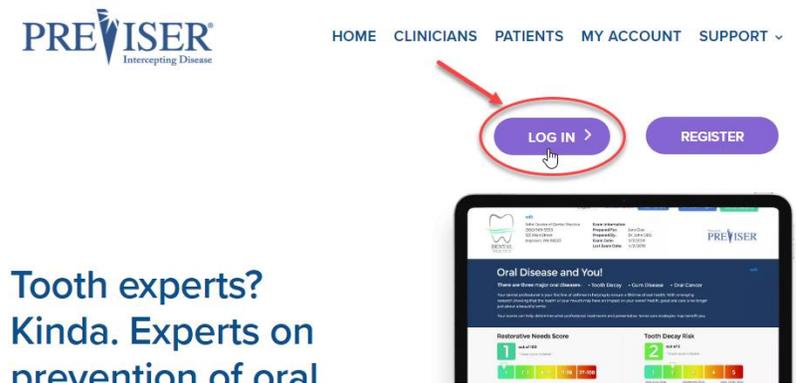
GETTING STARTED WITH THE CLINICAL SUITE

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:

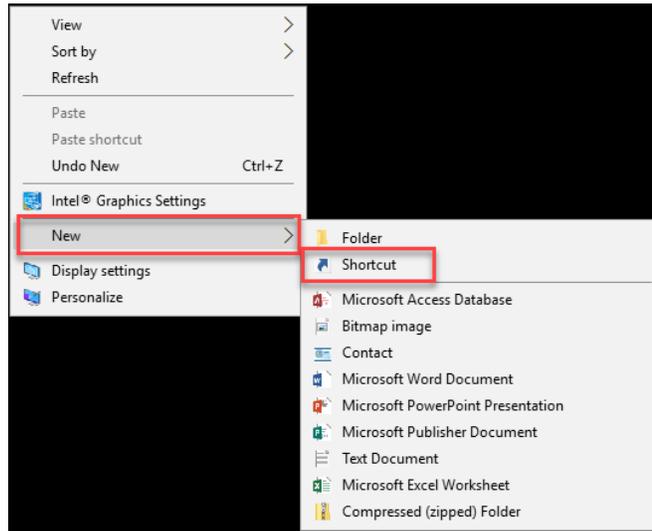


then click **Access PreViser Clinical Suite Here**

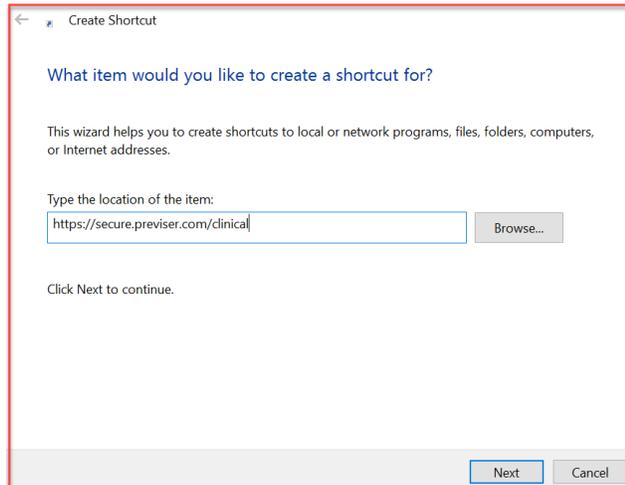


TO CREATE A SHORTCUT ON YOUR DESKTOP

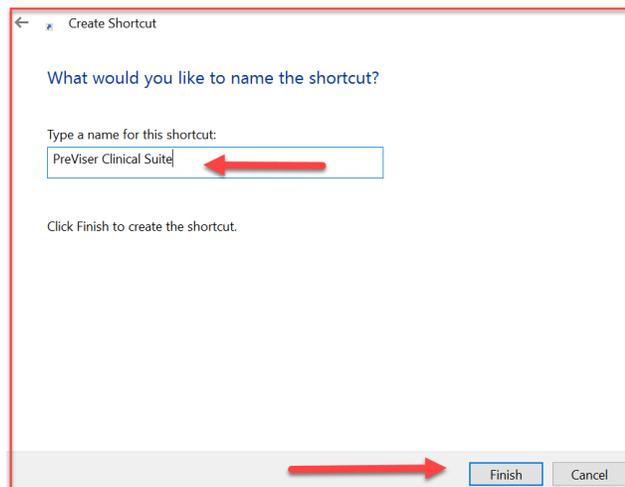
1. Right-click anywhere on your desktop.
2. Select **New** and then **Shortcut**.



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**.

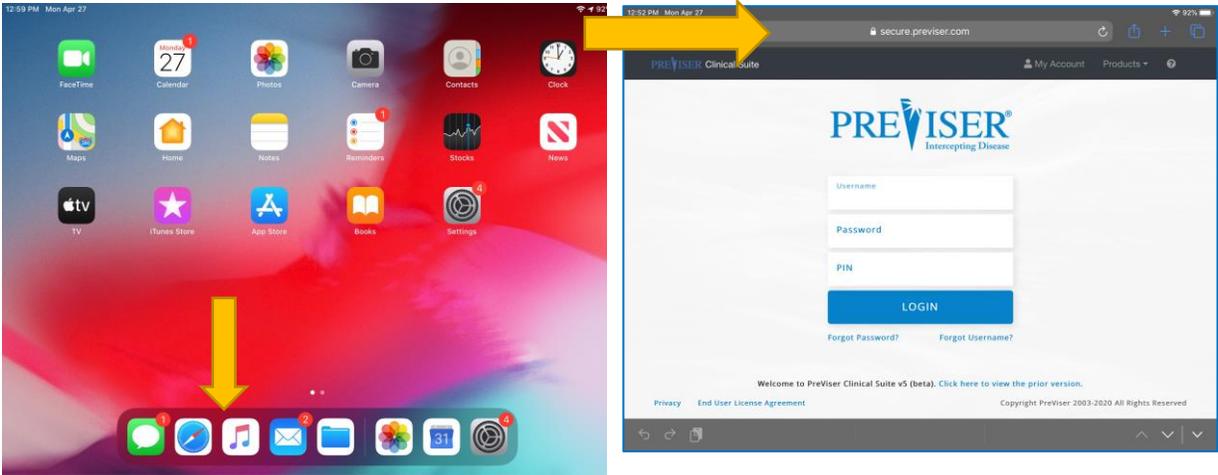


You will now have a shortcut displayed on your desktop labeled **PreViser Clinical Suite**.

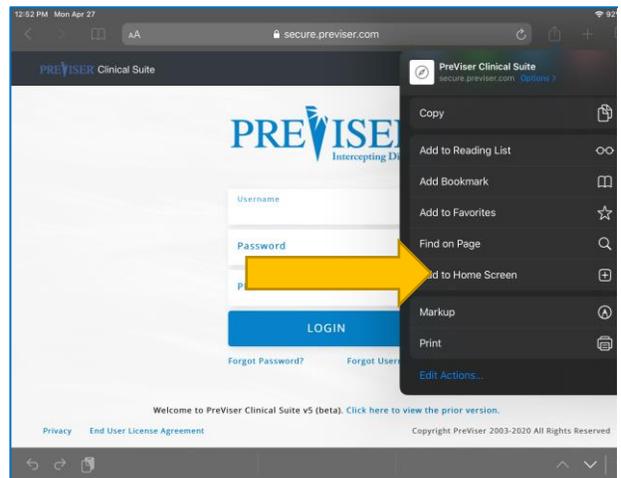


TO CREATE A SHORTCUT ON YOUR IPAD

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!



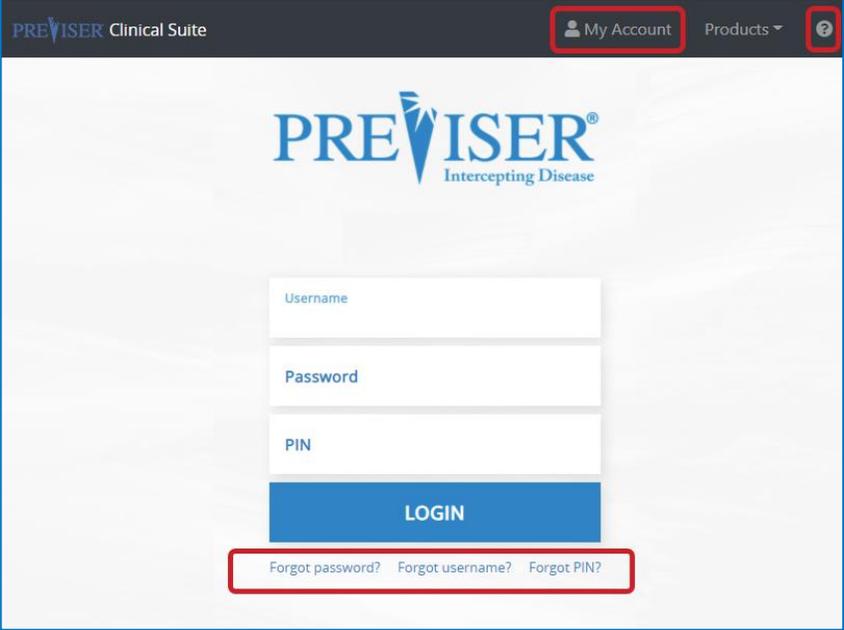
ACCESSING THE CLINICAL SUITE

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](#).



PREVISER Clinical Suite

My Account Products ?

PREVISER
Intercepting Disease

Username

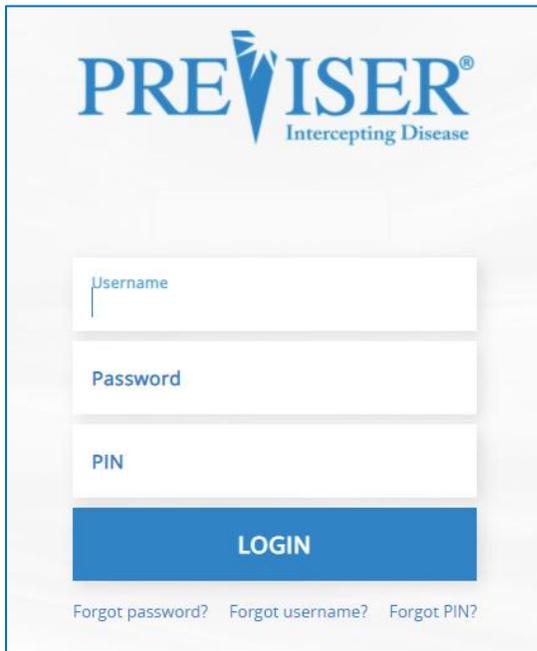
Password

PIN

LOGIN

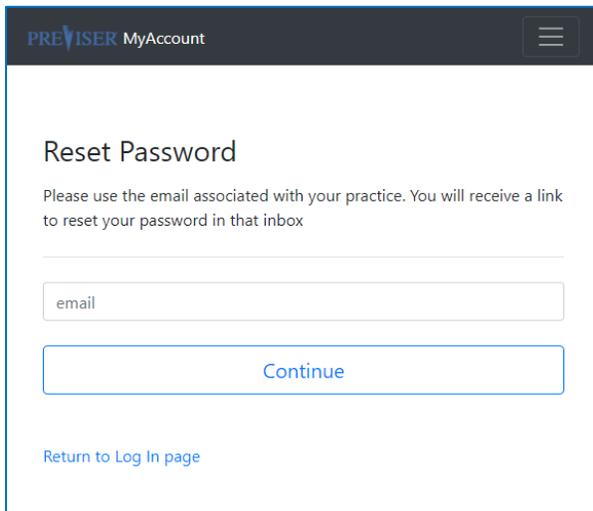
Forgot password? Forgot username? Forgot PIN?

LOST PASSWORD, USERNAME, OR PIN

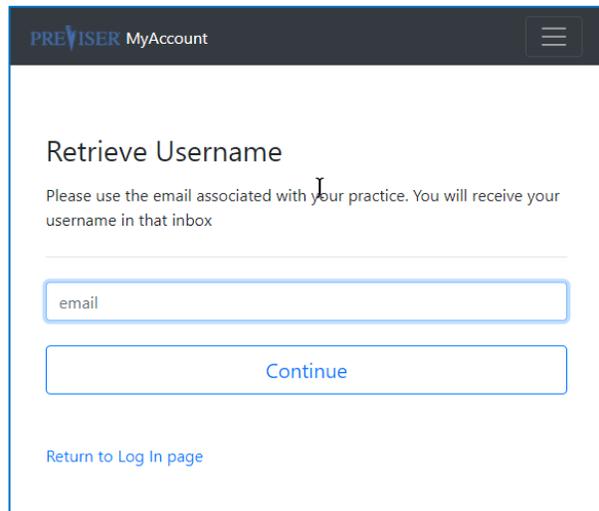


The screenshot shows the PreViser login interface. At the top is the PreViser logo with the tagline "Intercepting Disease". Below the logo are three input fields: "Username", "Password", and "PIN". A blue "LOGIN" button is positioned below these fields. At the bottom of the form, there are three links: "Forgot password?", "Forgot username?", and "Forgot PIN?".

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



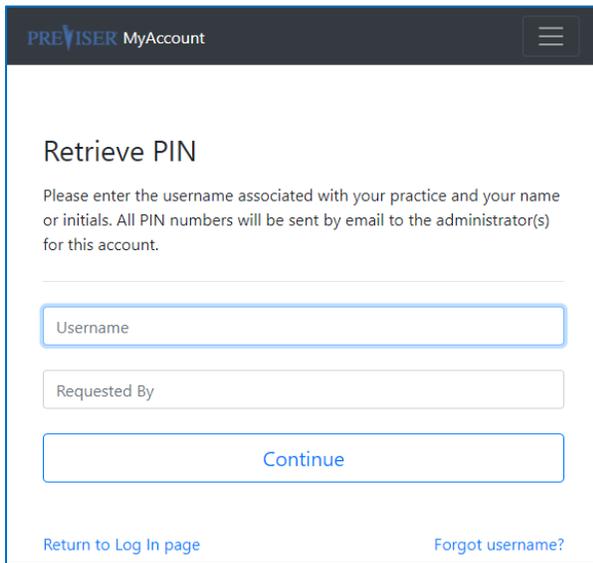
The screenshot shows the "Reset Password" page within the "PREVISER MyAccount" section. The page title is "Reset Password". Below the title is the instruction: "Please use the email associated with your practice. You will receive a link to reset your password in that inbox". There is an input field labeled "email" containing the placeholder text "email". Below the input field is a blue "Continue" button. At the bottom left, there is a link that says "Return to Log In page".



The screenshot shows the "Retrieve Username" page within the "PREVISER MyAccount" section. The page title is "Retrieve Username". Below the title is the instruction: "Please use the email associated with your practice. You will receive your username in that inbox". There is an input field labeled "email" containing the placeholder text "email". Below the input field is a blue "Continue" button. At the bottom left, there is a link that says "Return to Log In page".

continued

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

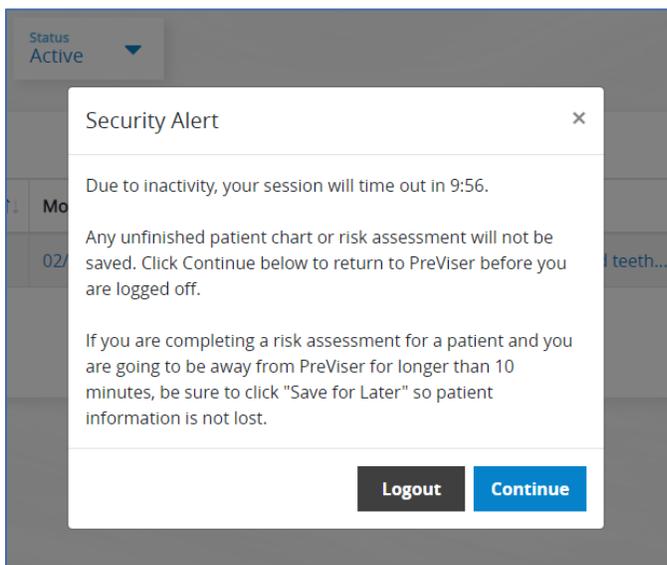


The screenshot shows the 'PREVISER MyAccount' interface. The main heading is 'Retrieve PIN'. Below the heading is a message: 'Please enter the username associated with your practice and your name or initials. All PIN numbers will be sent by email to the administrator(s) for this account.' There are two input fields: 'Username' and 'Requested By'. Below these fields is a blue 'Continue' button. At the bottom left, there is a link 'Return to Log In page', and at the bottom right, there is a link 'Forgot username?'.

TIME OUT FEATURE

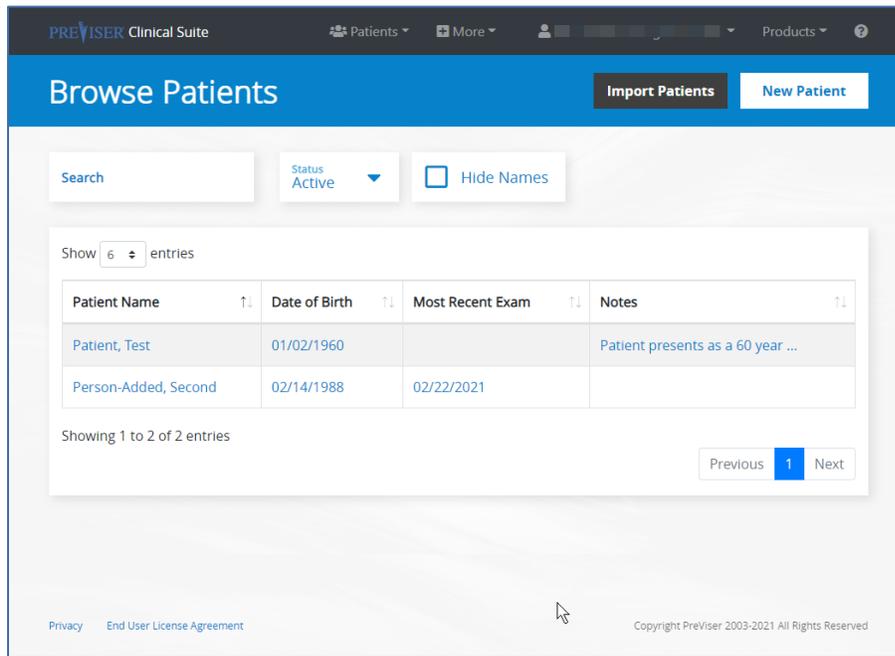
To ensure compliance with HIPAA IT security requirements, users of the PreViser Clinical Suite will see a new pop-up appear after 10 minutes of data entry inactivity. If you do not click the **Continue** button, 10 minutes after that you will be automatically logged off the system.

- ! 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

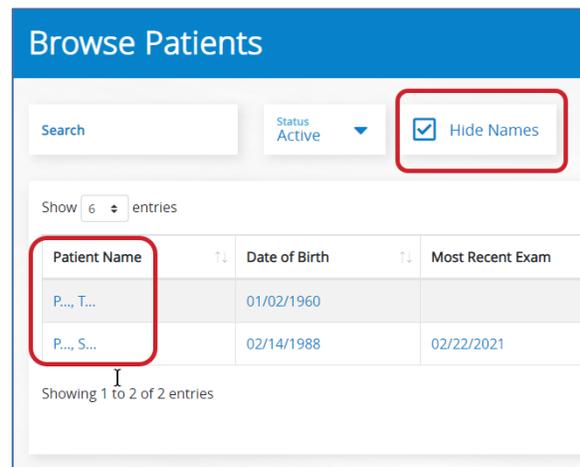
To search by Patient Name or Notes: type a whole or partial word in the Search field. The search filter works immediately as you enter the characters.

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.

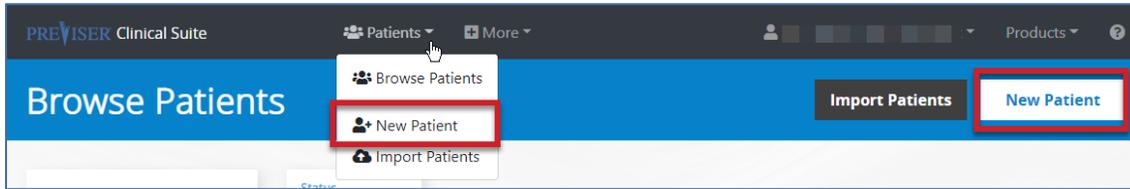
This enhances HIPAA compliance for offices by hiding protected health information if the computer monitor can be viewed by patients.



CREATING PATIENTS

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

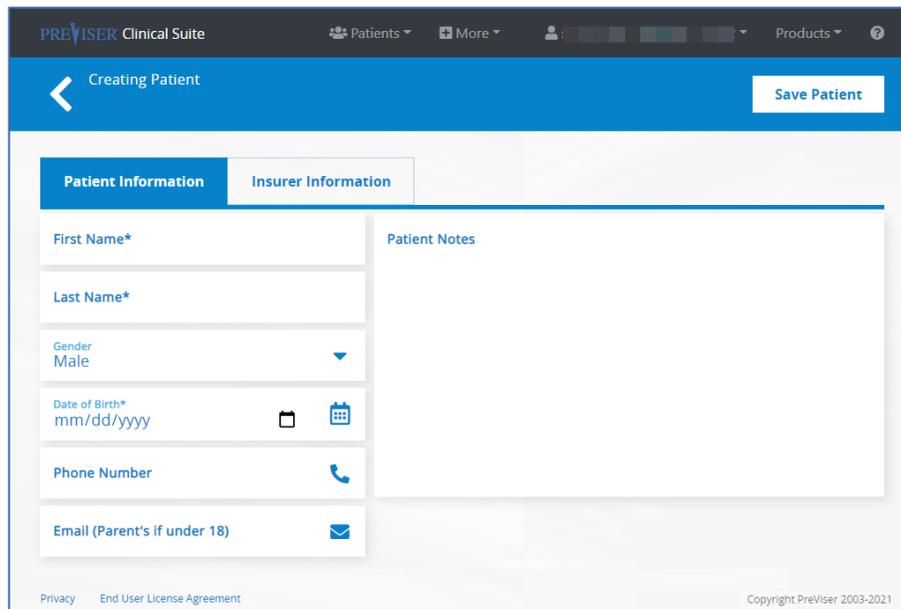
Click the **New Patient** button on the Home Page:



(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.

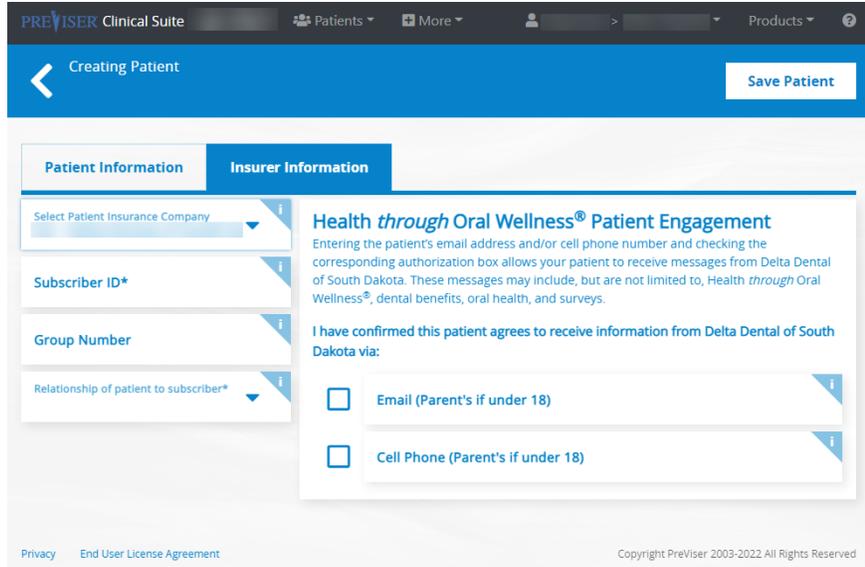
First Name*	Required.
Last Name*	Required.
Gender	Dropdown select Male or Female
Date of Birth*	Required, mm/dd/yyyy format
Phone Number	
Email	Parents if under 18
Patient Notes	

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.



PREVISER Clinical Suite Patients More Products

Creating Patient Save Patient

Patient Information Insurer Information

Select Patient Insurance Company

Subscriber ID*

Group Number

Relationship of patient to subscriber*

Health through Oral Wellness® Patient Engagement
 Entering the patient's email address and/or cell phone number and checking the corresponding authorization box allows your patient to receive messages from Delta Dental of South Dakota. These messages may include, but are not limited to, Health through Oral Wellness®, dental benefits, oral health, and surveys.

I have confirmed this patient agrees to receive information from Delta Dental of South Dakota via:

Email (Parent's if under 18)

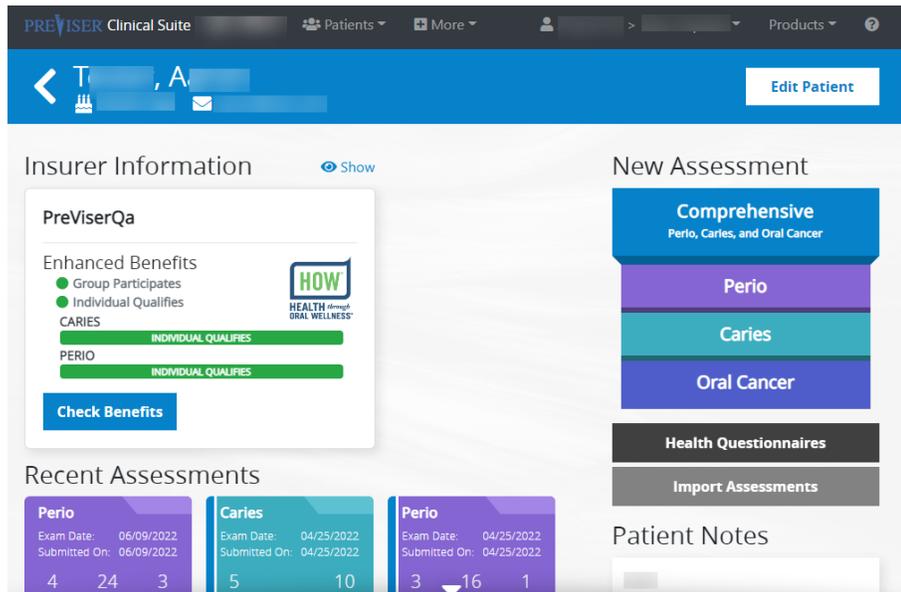
Cell Phone (Parent's if under 18)

Privacy End User License Agreement Copyright PreViser 2003-2022 All Rights Reserved

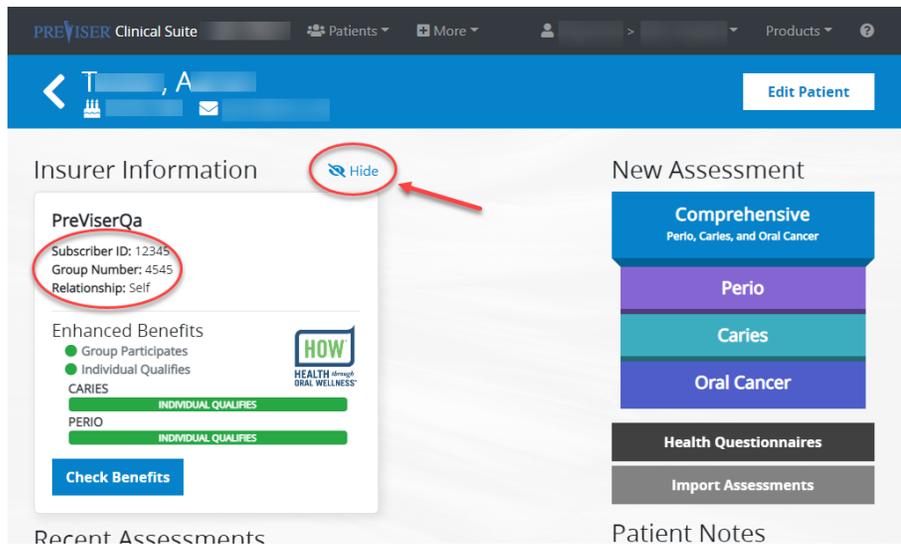
EDIT PATIENT INFORMATION

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 the 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**.

The screenshot shows the 'Editing Patient' interface. At the top, there is a blue header with a back arrow, the text 'Editing Patient', and a 'Save Patient' button highlighted with a red box. Below the header, there are two tabs: 'Patient Information' (selected) and 'Insurer Information'. The 'Patient Information' section contains several fields: 'Is Patient Active?' with 'Yes' and 'No' radio buttons; 'First Name*' with a text input field; 'Last Name*' with a text input field; 'Gender' with a dropdown menu set to 'Male'; 'Date of Birth*' with a date input field showing '04/28/1948'; 'Phone Number' with a text input field and a phone icon; and 'Email (Parent's If under 18)' with a text input field and an email icon. To the right of these fields is a 'Patient Notes' section with a text area. At the bottom of the form, there are links for 'Privacy' and 'End User License Agreement', and a copyright notice: 'Copyright PreViser 2003-2021 All Rights Reserved'.

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:

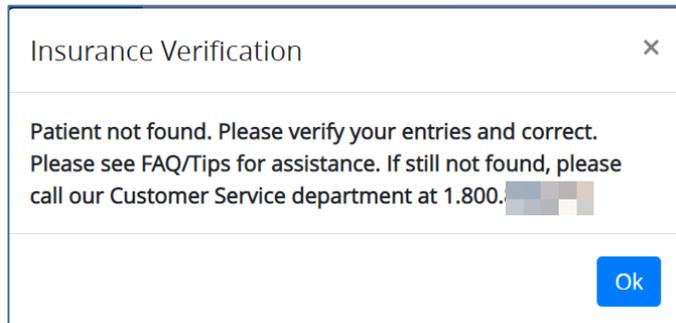
Patient Engagement
 Entering the patient’s e-mail address and checking the authorization box will allow your patient to receive oral wellness messaging that will increase their compliance with your recommended treatment plan.

I have confirmed that this patient wishes to receive additional information about their oral health.

PATIENT VERIFICATION

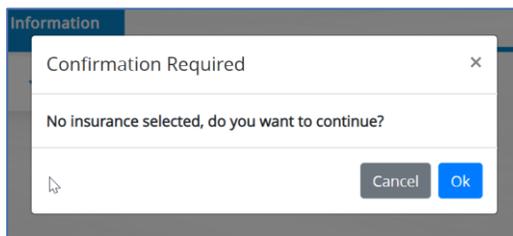
When an insurance company is selected, the Clinical Suite can verify the data that you enter with the information the insurance company has on file, if the insurer has established the necessary connection to the Clinical Suite. This can vary from one insurance company to another.

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:

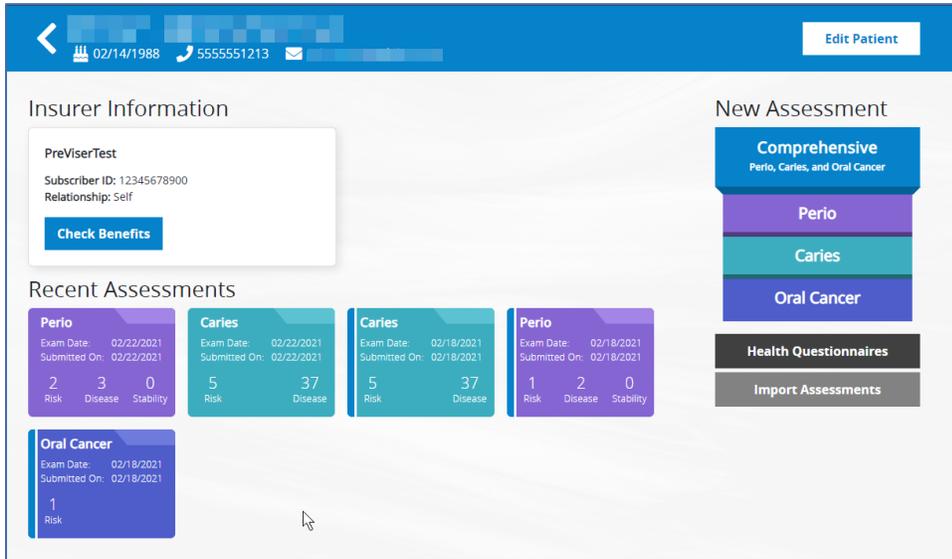


Once you confirm this status, an alert message will confirm that your patient was created successfully and saved



OVERALL ASSESSMENT INFORMATION

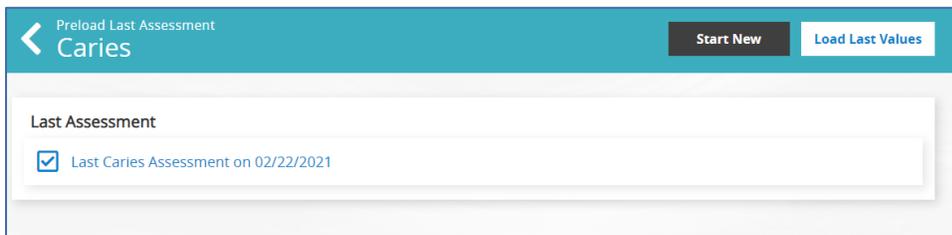
Select a patient you created and click one of the New Assessment choices on the Patient Details page to open and start a new **Comprehensive**, **Periodontal**, **Caries**, or **Oral Cancer** Assessment:



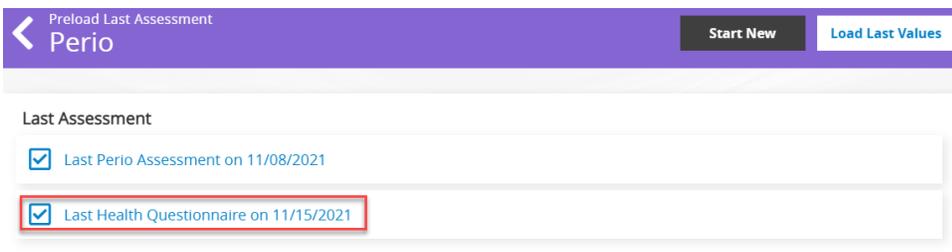
PRE-LOADING VALUES FROM PRIOR ASSESSMENTS

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.



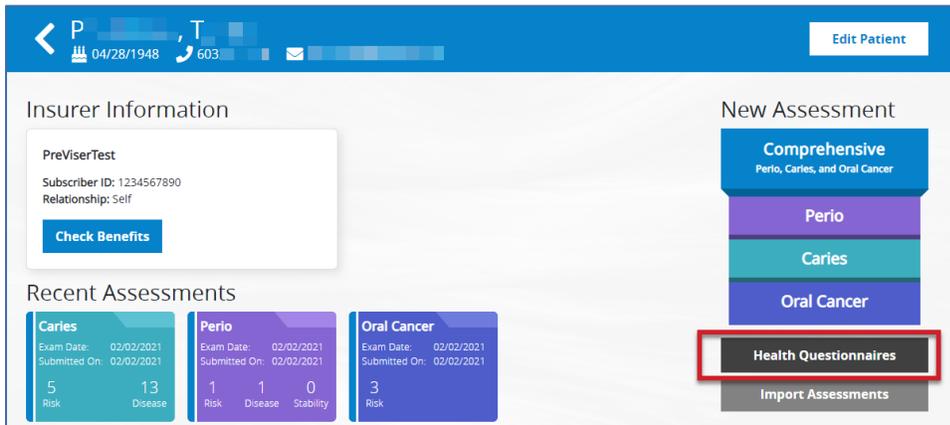
This saves time as it allows you to only address clinical conditions that have changed since the last assessment.

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.

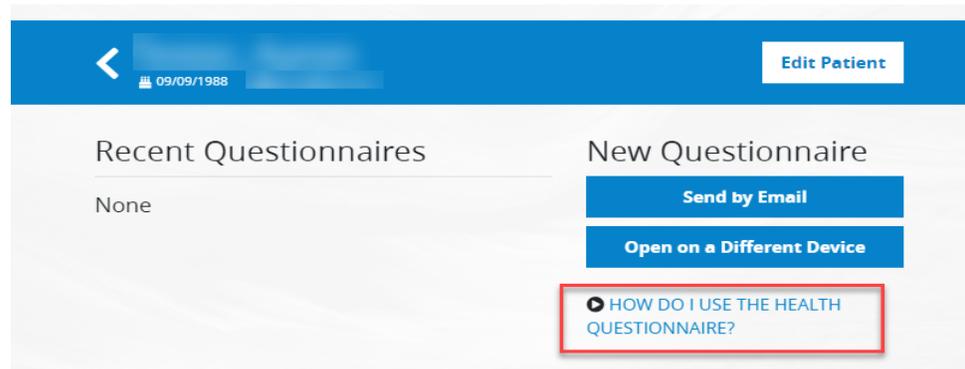
To create a health Questionnaire, or view the existing questionnaires, first select a patient from the patient list, view the *Patient Details* page and click the **Health Questionnaires** button:



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.

Health Questionnaire for [blurred]

A health questionnaire allows your patient to provide Oral Health Information that can be used in a Clinical Risk Assessment.

Send a blank health questionnaire to:

Email

Cancel Send

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

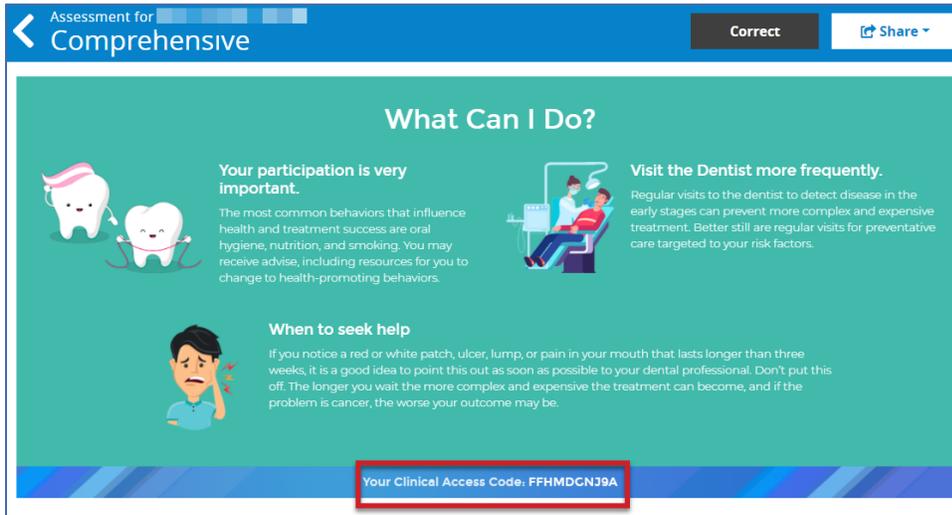
How often do you drink alcohol?
 Never Less than 1 drink per day 1 drink per day 2 drinks per day 3 or more drinks per day I don't know

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

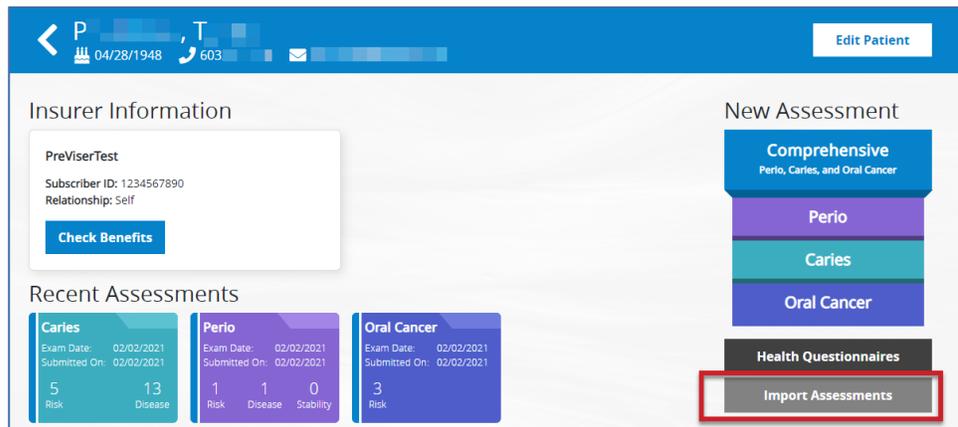
Powered by PreViser © Corporation

IMPORTING ASSESSMENTS FROM OTHER PRACTICES

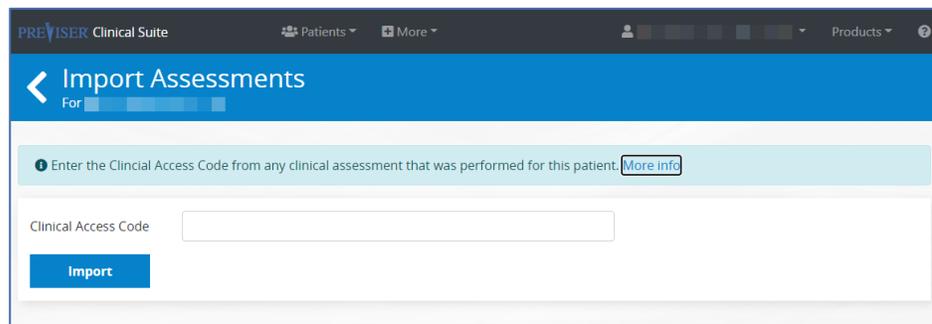
If a new patient comes to your practice from an office that uses PreViser and has performed PreViser assessments in the past, you are able to use that previous data. You can ask that patient to bring in an old report or you can reach out to the patient’s former dental provider and ask for the Clinical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



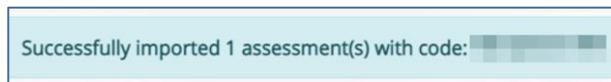
Once you receive that access code, click **Import Assessments** on the patient page:



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

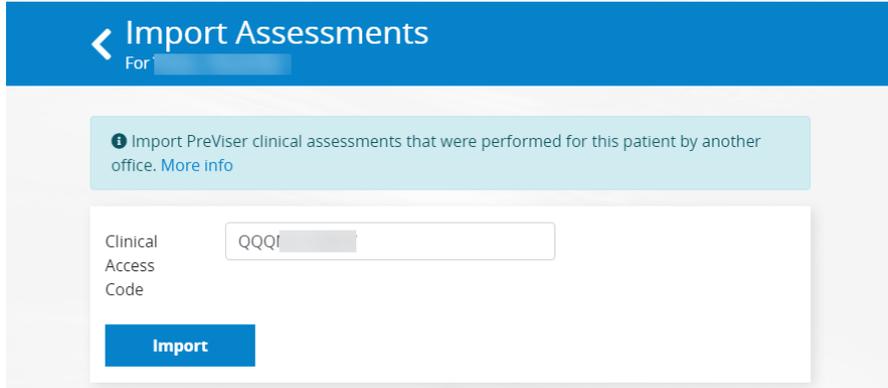


The top of the following page should display how many assessments imported successfully:



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

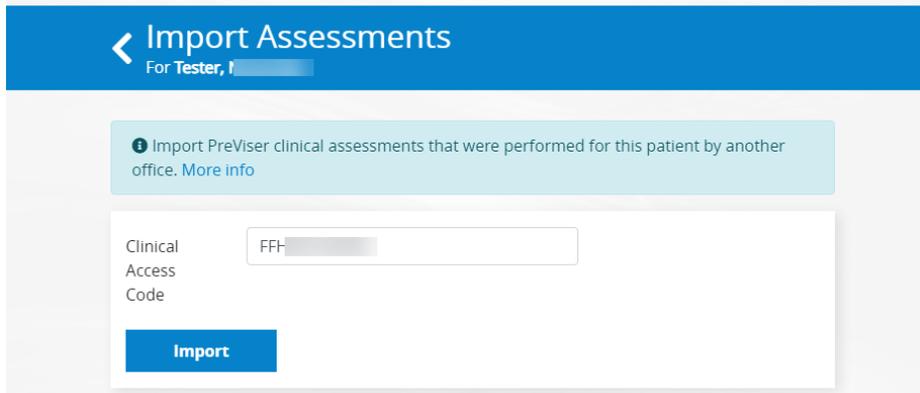
We were not able to locate a patient record associated with the Code you have entered. Please update your entry and try again.



The screenshot shows the 'Import Assessments' page for a patient. At the top, there is a blue header with a back arrow and the text 'Import Assessments'. Below the header, there is a light blue information box with an 'i' icon and the text: 'Import PreViser clinical assessments that were performed for this patient by another office. [More info](#)'. Below this is a form with the label 'Clinical Access Code' and a text input field containing 'QQQI'. A blue 'Import' button is located below the input field.

The patient birth date 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:

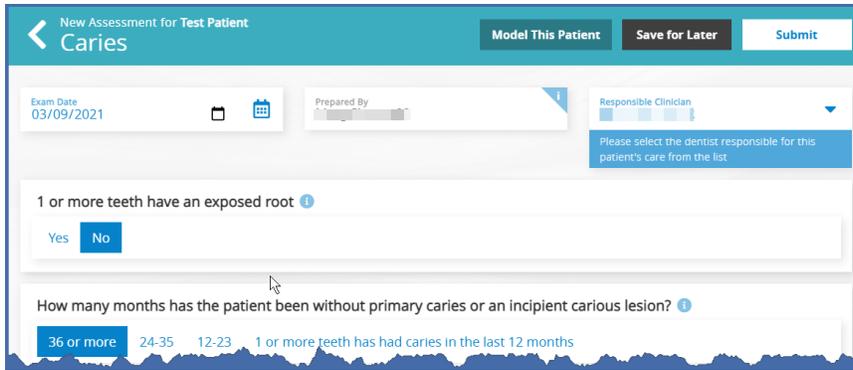
This patient's date of birth does not match the one associated with the Code: FFHMDXNB8W. Please verify that the patient's date of birth and the Code entered are correct and try again.

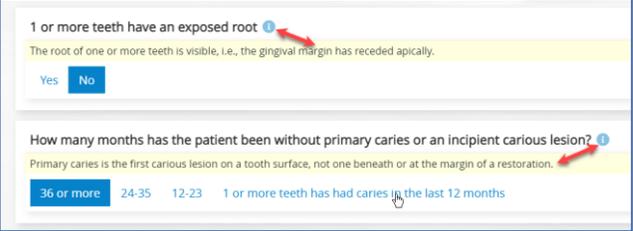


The screenshot shows the 'Import Assessments' page for a patient named 'Tester, I'. At the top, there is a blue header with a back arrow and the text 'Import Assessments'. Below the header, there is a light blue information box with an 'i' icon and the text: 'Import PreViser clinical assessments that were performed for this patient by another office. [More info](#)'. Below this is a form with the label 'Clinical Access Code' and a text input field containing 'FFH'. A blue 'Import' button is located below the input field.

PERFORMING AN ASSESSMENT

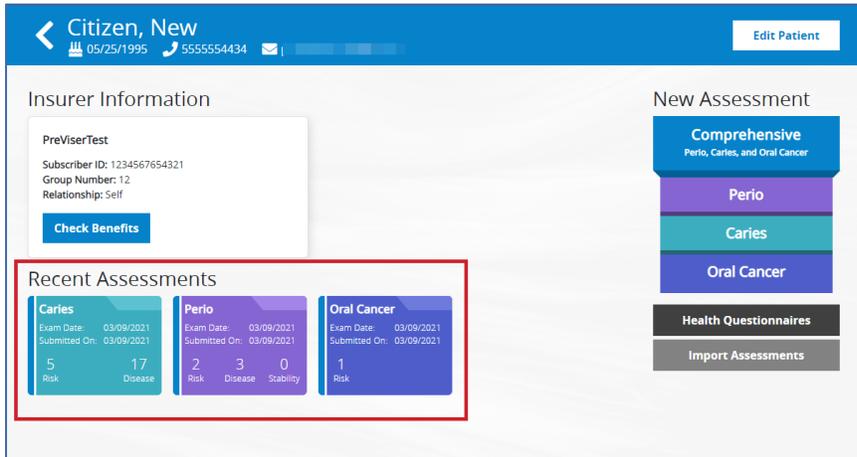
If any of the assessments are selected (Caries is used as the example below) and you begin the assessment, the following page displays:



<p>Exam Date</p>	<p>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.</p> <p>Note: if the exam date is more than 90 days in the past for a finished assessment, the Correct function is disabled.</p>
<p>Prepared By</p>	<p>The person who is performing the assessment. Will match the clinician logged in to the Clinical Suite with their PIN.</p>
<p>Responsible Clinician</p>	<p>This is the clinician who is ultimately responsible for the care of the patient, typically a dentist or independent practicing hygienist.</p>
<p> Contextual help for all clinical assessment questions</p>	<p>Select the ‘i’ icon next to the questions for additional clarification.</p> 
<p>Submit</p>	<p>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.</p>
<p>Save for Later</p>	<p>This option allows the unfinished assessment to be saved without submitting and for the clinician to come back to finish at a later time.</p>
<p>Model this Patient</p>	<p>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.</p>

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:



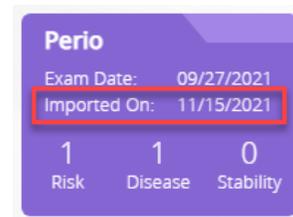
The type, date, and scores for the assessment are shown, where:

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

Disease = the restorative needs or periodontal disease severity scores;

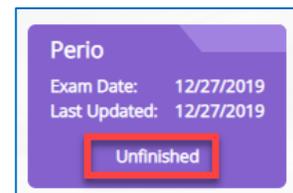
Stability = is the periodontal disease stability score for the patient.

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

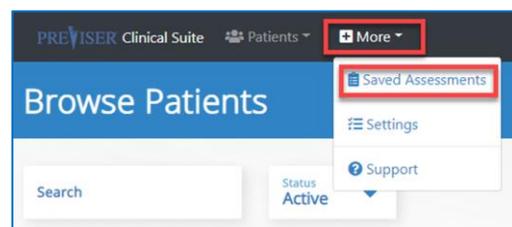


Where **Unfinished** appears instead of scores, this will be an assessment that was not completed but saved to complete later.

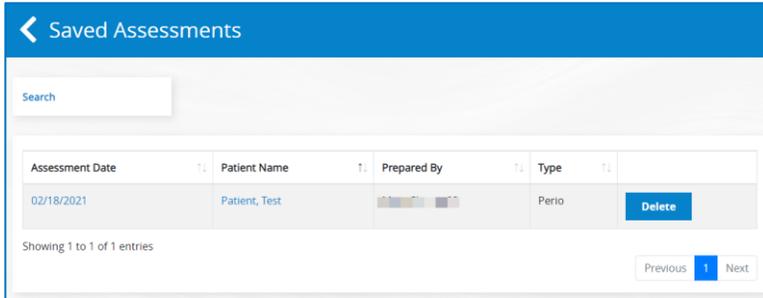
Note: If you select to **Model This Patient**, the assessment will not appear in this section because modeled assessments are not recorded in the PreViser database and disappear once you close the modeled patient report.



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:

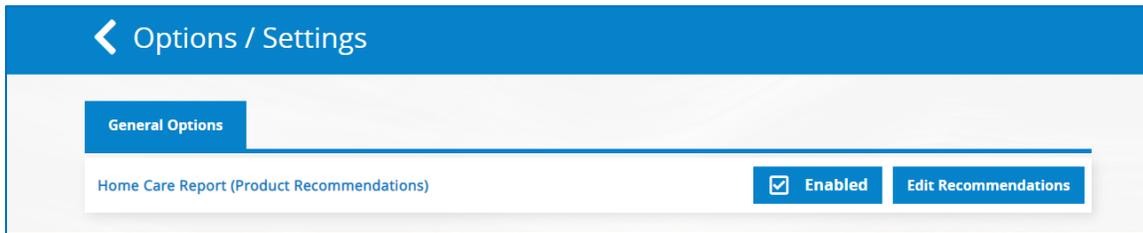


Click **Assessment Date** to display the data input page for the unfinished assessment. You can then provide the missing information before submitting the assessment by clicking **Submit**. Alternately, you can delete the unfinished assessment by clicking the **Delete** button.

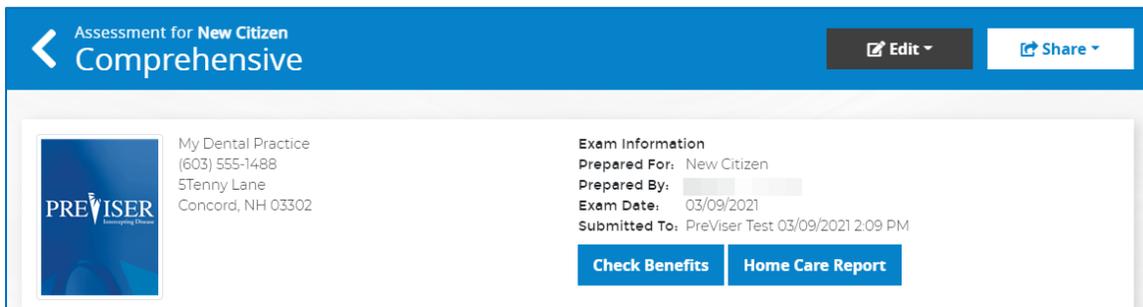
HOME CARE REPORT (HCR)

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.

←
Recommendations for **New Citizen**
Customize
Share

Home Care Report



My Dental Practice
(603) 555-1488
5Tenny Lane
Concord, NH 03302

Exam Information

Prepared For: New Citizen

Prepared By: [Redacted]

Exam Date: 03/09/2021

Our recommendations for appropriate home care products

Our home care product recommendations are generally based on the highest risk score calculated for you based on your examination. Our experience is that the following products will likely help you maintain the best oral health possible and avoid future disease.

Tooth Decay Risk Score: 5

Gum Disease Risk Score: 2

Toothpaste

AM: Colgate® TotalSF

Fights harmful bacteria on 100% of mouth surfaces*. Now with sensitivity relief. *Colgate Clinical Report 20180316BAC



Manual Brush

COLGATE® 360® TOOTHBRUSH

Revolutionizes oral care by cleaning the teeth, tongue, cheeks and gums and removes more Bacteria. Multi-level bristles to remove more plaque in between teeth. Raised cleaning tip cleans hard-to-reach places.



Prescription Toothpaste

PM: 5000 PPM RX TOOTH PASTE

Because of one or more risk factors your teeth are more vulnerable to tooth decay and cavities. To help protect against further decay, brushing with a prescription level fluoride toothpaste daily helps strengthen tooth enamel to protect against the effects of decay causing acids. Using a 5000ppm toothpaste as prescribed could benefit your oral health by: Fewer areas of decay, Stronger teeth, and Fewer cavities, reduced fillings.



The products identified in this report have been selected or identified by your treating dentist and/or hygienist based on his or her clinical judgment, your PreViser scores, and your statements to your treating dentist or hygienist. These product recommendations are not prescriptions, nor are they intended to establish a standard of care. They are not a substitute for professional judgment, advice, diagnosis, or treatment. Neither PreViser Corporation nor the product manufacturer(s) make any warranty, express or implied, as to the suitability, availability, or clinical efficacy of the recommended products.

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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.

< Customize Recommendations for **New Citizen**
Done ✓

Home Care Report

● Customize the product recommendations presented in this Home Care Report to best suit your patients' needs. [More info](#)



My Dental Practice
(603) 555-1488
5Tenny Lane
Concord, NH 03302

Exam Information
Prepared For: New Citizen
Prepared By: [Redacted]
Exam Date: 03/09/2021

Our recommendations for appropriate home care products

Our home care product recommendations are generally based on the highest risk score calculated for you based on your examination. Our experience is that the following products will likely help you maintain the best oral health possible and avoid future disease.

Tooth Decay Risk Score: 5
Gum Disease Risk Score: 2

Toothpaste
AM: Colgate® TotalSF

Fights harmful bacteria on 100% of mouth surfaces*. Now with sensitivity relief. *Colgate Clinical Report 20180316BAC



Show Mouth Rinse Recommendation

Manual Brush
COLGATE® 360® TOOTHBRUSH

Revolutionizes oral care by cleaning the teeth, tongue, cheeks and gums and removes more Bacteria. Multi-level bristles to remove more plaque in between teeth. Raised cleaning tip cleans hard-to-reach places.



Show Prescription Rinse Recommendation

Prescription Toothpaste
PM: 5000 PPM RX TOOTH PASTE

Because of one or more risk factors your teeth are more vulnerable to tooth decay and cavities. To help protect against further decay, brushing with a prescription level fluoride toothpaste daily helps strengthen tooth enamel to protect against the effects of decay causing acids. Using a 5000ppm toothpaste as prescribed could benefit your oral health by: Fewer areas of decay, Stronger teeth, and Fewer cavities, reduced fillings.



Show Additional Notes Section

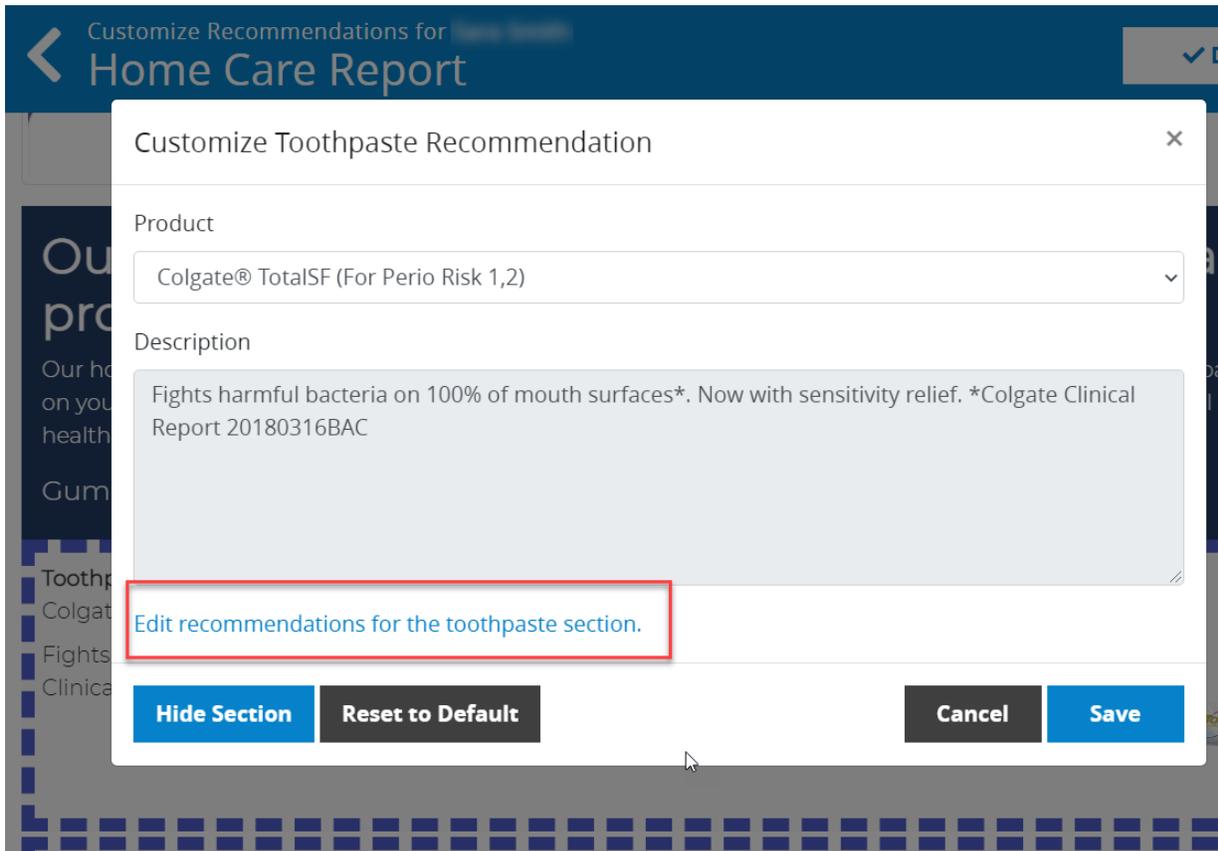
The products identified in this report have been selected or identified by your treating dentist and/or hygienist based on his or her clinical judgment, your PreViser scores, and your statements to your treating dentist or hygienist. These product recommendations are not prescriptions, nor are they intended to establish a standard of care. They are not a substitute for professional judgment, advice, diagnosis, or treatment. Neither PreViser Corporation nor the product manufacturer(s) make any warranty, express or implied, as to the suitability, availability, or clinical efficacy of the recommended products.

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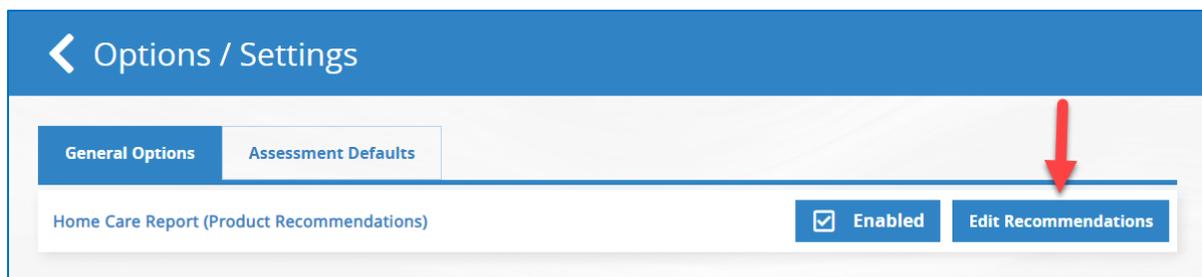
PreViser Corporation Company Proprietary

29 | Page

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:

<
Home Care Report
Edit Recommendations

i Change the default product recommendations that appears on ALL Home Care Reports. [More info](#)

Our recommendations for appropriate home care products

Our home care product recommendations are generally based on the highest risk score calculated for you based on your examination. Our experience is that the following products will likely help you maintain the best oral health possible and avoid future disease.

Toothpaste Recommended Product	Customize Toothpaste Recommendations
Mouth Rinse Recommended Product	Customize Mouth Rinse Recommendations
Manual Brush Recommended Product	Customize Manual Brush Recommendations
Power Brush Recommended Product	Customize Power Brush Recommendations
Interdental Device Recommended Product	Customize Interdental Device Recommendations
Prescription Rinse Recommended Product	Customize Prescription Rinse Recommendations
Prescription Toothpaste Recommended Product	Customize Prescription Toothpaste Recommendations

Additional Notes

Notes can be added in the customize dialog after a home care report is created.

The products identified in this report have been selected or identified by your treating dentist and/or hygienist based on his or her clinical judgment, your PreViser scores, and your statements to your treating dentist or hygienist. These product recommendations are not prescriptions, nor are they intended to establish a standard of care. They are not a substitute for professional judgment, advice, diagnosis, or treatment. Neither PreViser Corporation nor the product manufacturer(s) make any warranty, express or implied, as to the suitability, availability, or clinical efficacy of the recommended products.

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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 –

- carries risk 1 or 2 (very low and low),
- carries risk 3 (moderate),
- carries 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.

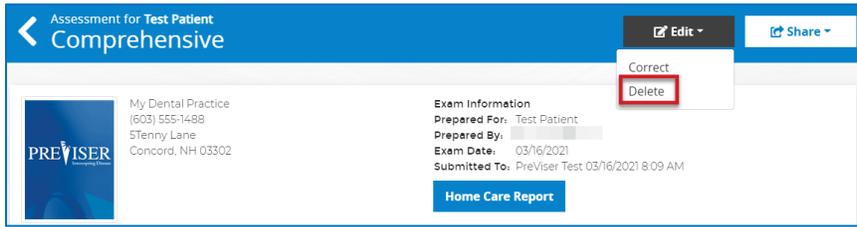
Cancel closes the page without saving any changes.

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

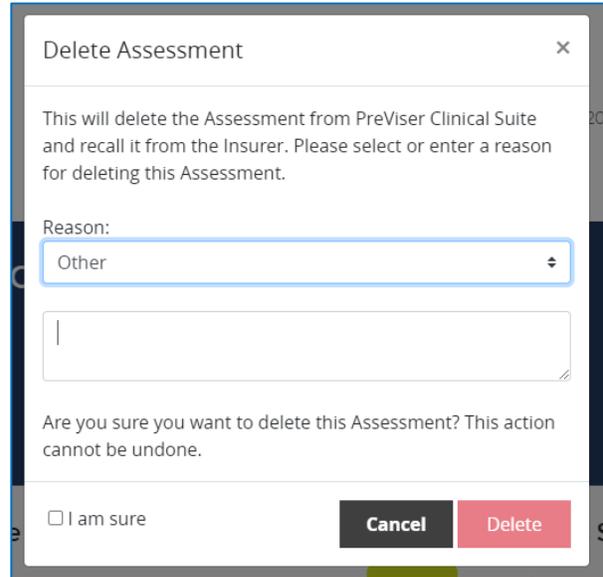
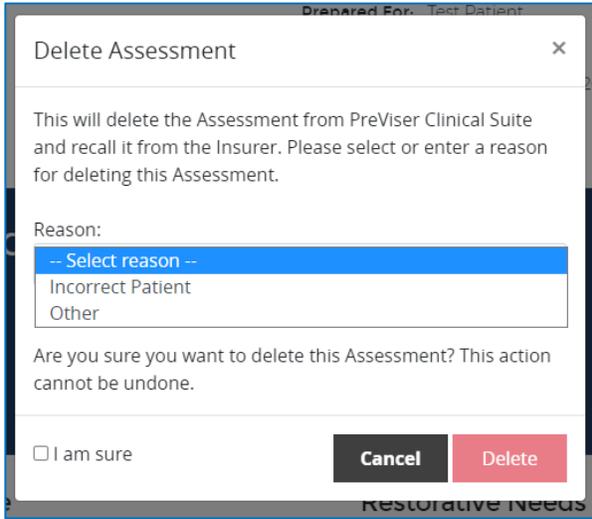
DELETING ASSESSMENTS

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

Caution: This action cannot be undone.

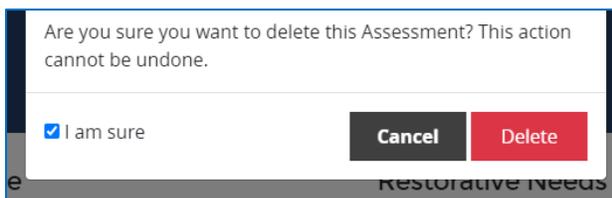


A reason for deleting an assessment must be provided. Select either **Incorrect Patient** or **Other**.



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.



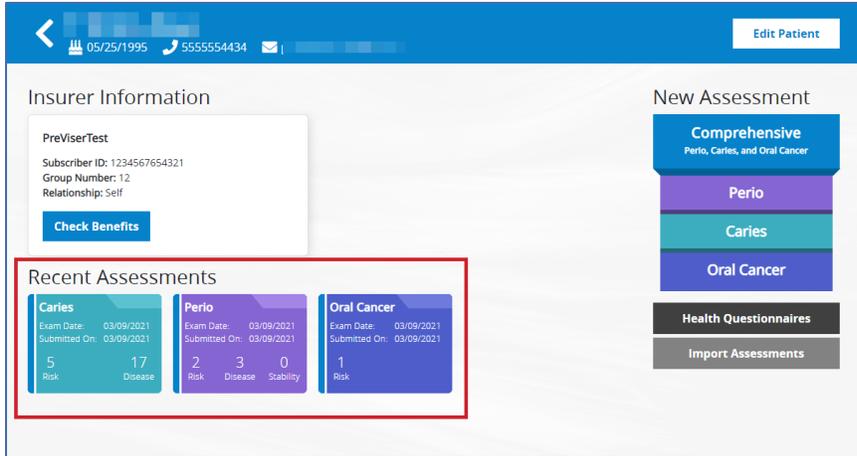
Click the **Delete** button.

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

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

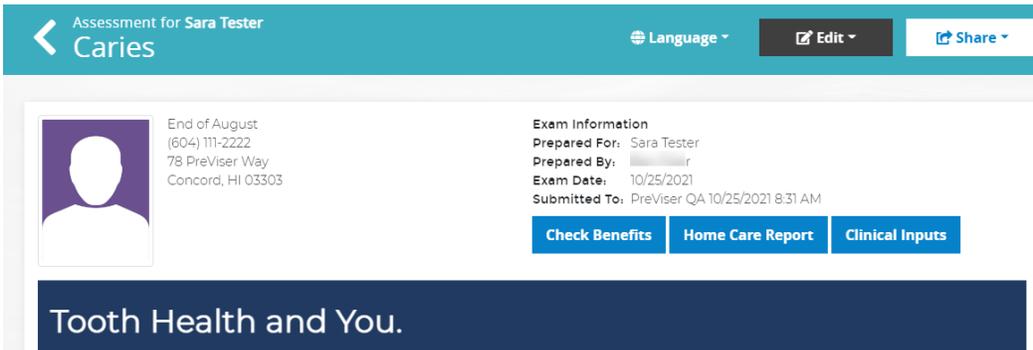
REPORT OVERVIEW

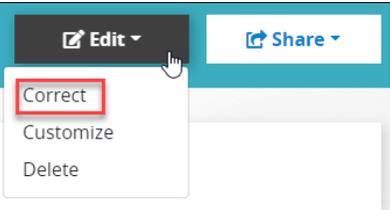
After assessments have been performed, clinicians are able to view the reports anytime, whether the assessment was just performed or is an older one selected from the **Recent Assessments** list on the *Patient Details* page.



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:



	<p>Click this link at the top of the report to return to the Patient Details page for the patient being assessed.</p>
<p>Your Image</p>	<p>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.</p>
<p>Edit/Correct</p>	<p>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.</p> 

<p>Edit/Delete</p>	<p>Assessments dated less than 90 days in the past can be deleted by clicking on the <i>Edit > Delete</i> link. NOTE: the insurance company the given patient is associated with can opt out of this functionality.</p>	
<p>Edit/Customize</p>	<p>Each individual assessment report can be customized by the clinician by clicking on the <i>Edit > Customize</i> link.</p>	
<p>Share/Print</p>	<p>Click Share then click Print to direct the report to a printer.</p>	
<p>Share/Email</p> <p>Click Share, then click Email, then OK to email reports to patients.</p> <p>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.</p> <p>Click OK to acknowledge the successfully sent message.</p>		
<p>Language drop-down</p>	<p>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.</p>	

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.

The Clinical Inputs can be viewed in English or Spanish, depending on the option selected by clicking the **Language** drop-down.

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

←
Responses for Sara Tester
Language ▾
Print

End of August
(604) 111-2222
78 PreViser Way
Concord, HI 03303

Exam Information
Prepared For: Sara Tester
Prepared By: Sara Tester
Exam Date: 10/25/2021

Caries Assessment Responses

Teeth	Treatment History and Considerations
1 or more teeth have an exposed root [No]	Dental care frequency is NOT as regular as advised [No]
How many months has the patient been without primary caries or an incipient carious lesion? [36 or more]	Development problems or special health care needs [No]
Bacteria culture includes elevated MS and/or LB level? [No culture or test is available]	Teeth have been extracted due to caries in last 36 months [No]
How many erupted teeth are present in the oral cavity? [20]	Fluoride varnish applied in last 6 months [No]
How many natural teeth have any type of restoration, including crowns and veneers? [0 (None)]	Has orthodontic appliance, space maintainer, or obturator [No]
How many natural teeth currently require treatment because of caries or a defective restoration? [0 (None)]	Questions the patient can answer
How many natural teeth have primary caries or an incipient caries lesion? [3 or more]	Snacks or beverages containing sugar are consumed between meals 4 or more times per day [No]
Clinical Conditions	Patient drinks fluoridated water [No]
Oral hygiene improvement is needed [Yes]	Nonprescription or prescription fluoride products other than water are used [No]
Dry mouth or inadequate saliva flow [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]

Your Clinical Access Code: FFHMTMCNMR

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**.

The screenshot shows the 'New Assessment for Perio' form. At the top, there are buttons for 'Model This Patient', 'Save for Later', and 'Submit'. The form includes sections for 'Cigarette Smoking', 'Diabetic Status', 'Check all that apply', 'Deepest Pocket Per Sextant from the Gingival Margin to the Base of the Sulcus', 'Xray Distance from CEJ to Bone Crest', and 'Report Settings'. The 'Deepest Pocket' and 'Xray Distance' sections include grids for recording data for different tooth quadrants (Upper Right, Upper Anterior, Upper Left, Lower Right, Lower Anterior, Lower Left).

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:

Report Settings

Treatment Options

Do you wish to indicate the use of laser therapy?

Treatment Options

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

To help maintain or improve the health of your gums:

Pockets less than 5mm



Pockets that are less than 5mm deep can have the most thorough removal of bacteria and calculus. However, all deep pockets were at one time less than 5mm with the optimal probing depth being 3mm or less.

Pockets 5-7mm



Pockets in the 5 to 7 depth range cannot be cleaned with a toothbrush and floss, and professional cleaning instruments don't always reach the bottom of the pocket. Incomplete removal of plaque and calculus results in deeper pockets and tooth loss.

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:

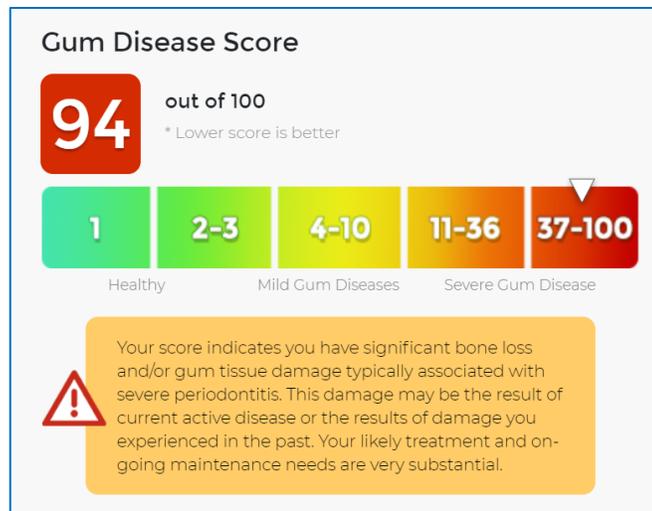


Periodontal Disease Severity

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:

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.

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.

← New Assessment for [Patient Name]
Model This Patient
Save for Later
Submit

Exam Date
03/10/2021

Prepared By [User]

Responsible Clinician
Please select the dentist responsible for this patient's care from the list

1 or more teeth have an exposed root ?

Yes No

How many months has the patient been without primary caries or an incipient carious lesion? ?

36 or more 24-35 12-23 1 or more teeth has had caries in the last 12 months

Bacteria culture includes elevated MS and/or LB level? ?

Yes No No culture or test is available

Please answer the following questions (exclude third molars)

How many erupted teeth are present in the oral cavity? ?

of teeth
28

How many natural teeth have any type of restoration, including crowns and veneers?

of teeth
0 (None)

How many natural teeth currently require treatment because of caries or a defective restoration?

of teeth
0 (None)

How many natural teeth have primary caries or an incipient caries lesion? ?

of teeth
0 (None)

Check all that apply

Clinical Conditions ?

Oral hygiene improvement is needed

Dry mouth or inadequate saliva flow

Questions the patient can answer

Snacks or beverages containing sugar are consumed between meals 4 or more times per day

Patient drinks fluoridated water

Treatment History and Considerations ?

Dental care frequency is NOT as regular as advised

Development problems or special health care needs

Teeth have been extracted due to caries in last 36 months

Fluoride varnish applied in last 6 months

Has orthodontic appliance, space maintainer, or obturator

Nonprescription or prescription fluoride products other than water are used

Chlorhexidine used for at least 1 week per month for last 6 months

Xylitol products have been used 4 times daily for last 6 months

Calcium & phosphate toothpaste have been used during last 6 months

Recreational drug/alcohol use

Has had a major change in health (heart attack, stroke, etc.) during the past 12 months

Report Settings

Treatment Options

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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:

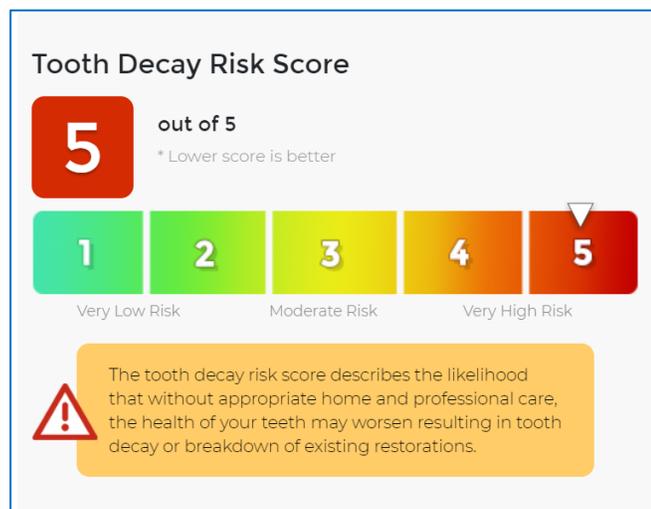
Report Settings

Treatment Options

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:

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

- Talk to your dentist about managing the risk factors that may contribute to tooth decay
- Brush twice a day with fluoride toothpaste
- Clean between your teeth daily with floss or an interdental cleaner

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:

← New Assessment for New Citizen
Model This Patient
Save for Later
Submit

Exam Date
03/11/2021

Prepared By

Responsible Clinician
Please select the dentist responsible for this patient's care from the list

Medical History

 Has history of oral cancer

Cigarette Smoking

Has the patient smoked cigarettes?

Pipes/Cigars

Has the patient smoked pipes or cigars?

Smokeless (Chewing) Tobacco

Has the patient used smokeless (chewing) tobacco?

Alcohol Use

Note: 1 drink equals

Beer	12 ounces or 355 milliliters	5% alcohol
Wine	5 ounces or 150 milliliters	12% alcohol
Spirits	1.5 ounces or 45 milliliters	40% alcohol

Number of drinks consumed in the past year

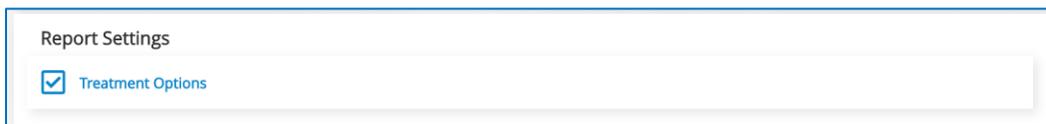
Report Settings

 Treatment Options

Privacy End User License Agreement
Copyright PreViser 2003-2021 All Rights Reserved

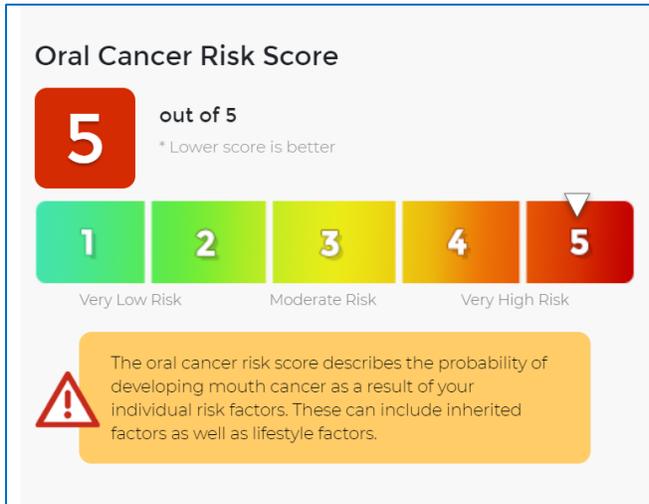
REPORT OPTIONS – ORAL CANCER

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:

Oral Cancer and You.

Am I at risk?

Anyone can get oral cancer. The most common factors for oral cancer are:

- Over 40 years of age
- Use of any type of tobacco product
- Regularly drink alcohol
- Exposure to the HPV virus

How do I reduce my risk?

Lifestyle factors like tobacco, alcohol use and poor dental hygiene can be managed with a subsequent reduction in the risk of mouth cancer. In addition, recent research has indicated that exposure to the HPV 16 virus that can be sexually transmitted is a significant risk factor for oral cancer, and may be responsible for the increasing incidence of mouth cancers in younger populations.

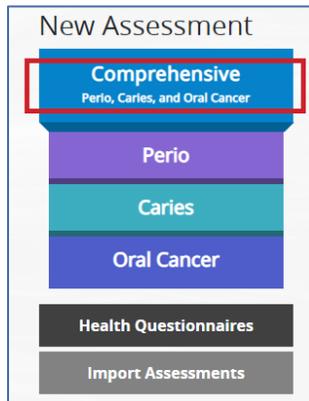
If you select **Treatment Options** in **Report Settings** before submitting the clinical data to generate the report, those recommendations will be included. **Clinical Inputs** will also display and can be printed optionally to help guide the patient on what risk factors may be elevating their risk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

Assessment for Sara Tester
Comprehensive

Language Edit Share

End of August
 (604) 111-2222
 78 PreViser Way
 Concord, HI 03303

Exam Information
 Prepared For: Sara Tester
 Prepared By: [Redacted]
 Exam Date: 09/21/2021
 Submitted To: No Insurer Selected 09/21/2021 10:53 AM

Check Benefits Home Care Report Clinical Inputs

Oral Disease and You

There are three major oral diseases:

BENEFIT RETURN DISPLAY:

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

Information for New Citizen provided by Mock Delta Dental
Benefits

Information displayed on this website is based on current available benefits and patients' eligibility. It is possible this information may change, even retroactively, based on information provided by the account. Should changes occur in eligibility or benefits, there is no guarantee of payment.

Enhanced Benefits provided by Mock Delta Dental
 Group: Participates in HOW
 * This group participates in the Health through Oral Wellness program.

Individual:
 ** This individual has additional benefits for CRIES and PERIO through the Health through Oral Wellness program. For more information on what these additional preventive benefits are please [Click Here](#)

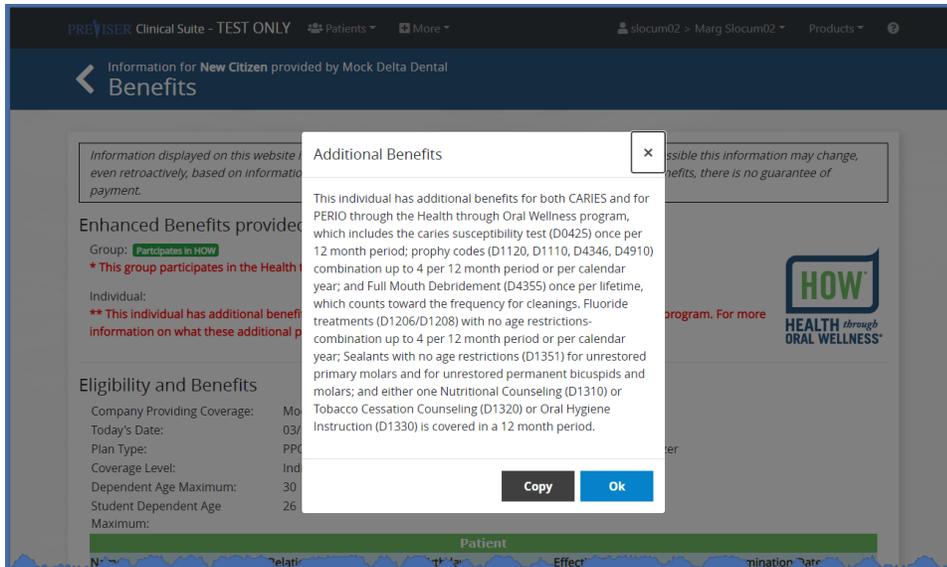
Eligibility and Benefits

Company Providing Coverage: Mock Delta Dental
 Today's Date: 03/11/2021 10:56 AM
 Plan Type: PPO Experience Rated - Master of Service plus Premier Choice Maximizer
 Coverage Level: Individual
 Dependent Age Maximum: 30
 Student Dependent Age Maximum: 26

Patient							
Name	Relationship	Birthday	Effective Date	Termination Date			
New Citizen	Self	05/25/1995	01/01/2019	Active			
Maximums (Benefit Period: 01/01/2019 - 12/31/2019)							
Service Type	Duration	Delta Dental PPO		Delta Dental Premier		Out-of-Network	
		Total	Remains	Total	Remains	Total	Remains
Dental Care (Individual)	Benefit Year	\$1,750.00	\$1,750.00	\$1,750.00	\$1,750.00	\$1,750.00	\$1,750.00
Dental Care (Individual)	Life	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00

ADDITIONAL ENHANCED BENEFITS INFORMATION:

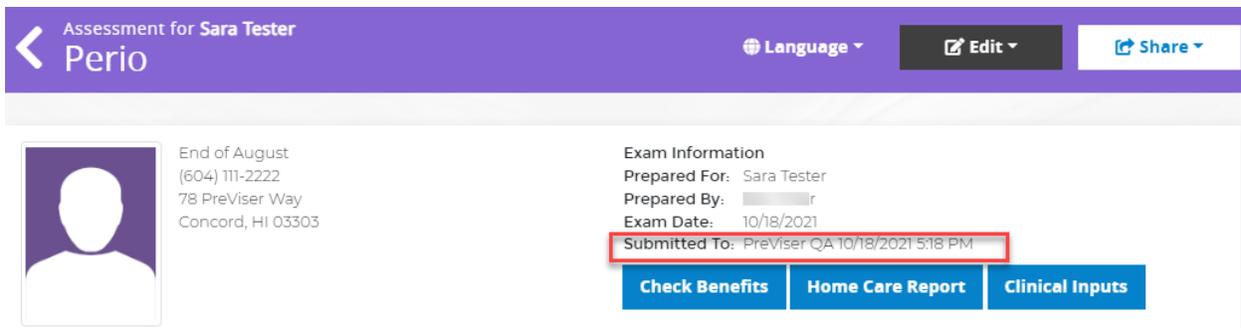
After the benefit return displays, you also have the option to expand on the enhanced benefit plan design for the patient, by clicking **Click Here**, as seen below. The copy button copies the text in the Additional Benefits window allowing you to paste it for reference later.



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.”

Assessment for Sara Tester
Comprehensive Language Edit Share



End of August
 (604) 111-2222
 78 PreViser Way
 Concord, HI 03303

Exam Information

Prepared For: Sara Tester

Prepared By:

Exam Date: 09/21/2021

Submitted To: No Insurer Selected 09/21/2021 10:53 AM

- Check Benefits
- Home Care Report
- Clinical Inputs

PRACTICE REPORTS

You can use Practice Reports to identifying high-risk patients and helping schedule recare appointments. Select the **More** dropdown arrow in the top header, then select **Practice Reports**.

Practice Reports
 Last updated 09/10/2021 1:11 PM

Want more Reports like this? Check out PreViser Analytics

Kind Perio

Show 5 entries

Patient Name	Email	Assessment Date	Risk Score	Disease Score
Smith, Todd	toddsmith@aol.com	09/10/2021	5	52
Kurt, Jordan		03/09/2021	3	13
Daniels, Jack		03/08/2021	1	1
Brave, Toby		03/08/2021	1	1
Greenfield, Becca	becs@yahoo.com	03/08/2021	5	13

Showing 1 to 5 of 44 entries

Previous 1 2 3 4 5 ... 9 Next

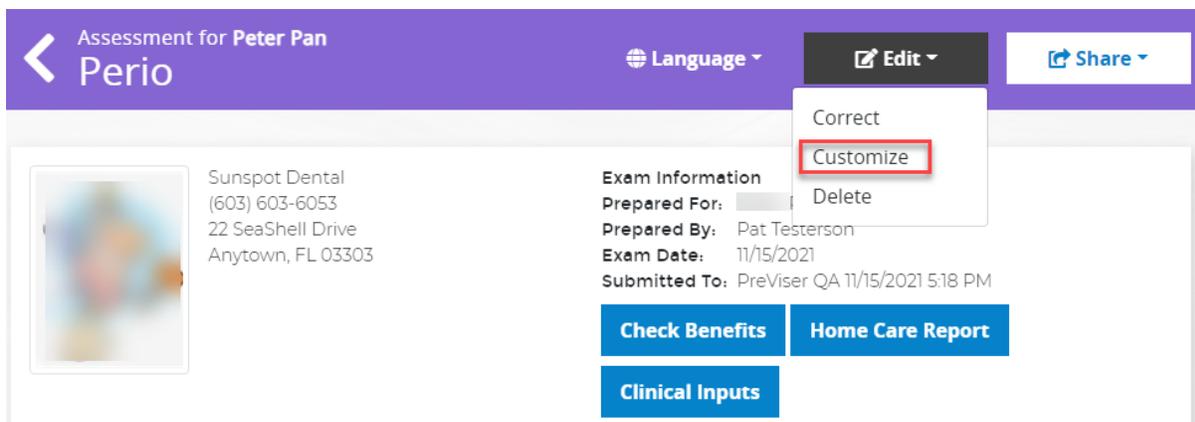
These reports can be organized by assessment type, assessment date, risk scores, and patient names. Organize the reports by assessment date to see when patients may be due for a follow up risk assessment and then reach out to schedule an appointment.

ENTERPRISE FEATURES

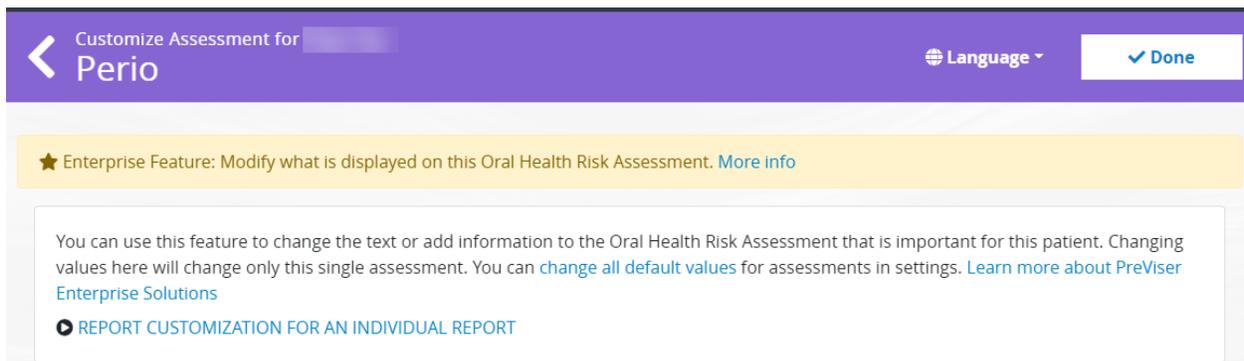
CUSTOMIZING INDIVIDUAL REPORTS

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:

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

2 out of 5
* Lower score is better

1	2	3	4	5
Very Low Risk	Moderate Risk	Very High Risk		

The gum disease risk score describes the likelihood that without appropriate home and professional care, the health of your gums may worsen resulting in infection and inflammation of your gums and the possible loss of teeth.

Gum Disease Score

1 out of 100
* Lower score is better

1	2-3	4-10	11-36	37-100
---	-----	------	-------	--------

Congratulations! Your score indicates your gums are healthy.

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.

Customize Gum Disease Risk Score Section ✕

The gum disease risk score describes the likelihood that without appropriate home and professional care, the health of your gums may worsen resulting in infection and inflammation of your gums and the possible loss of teeth.

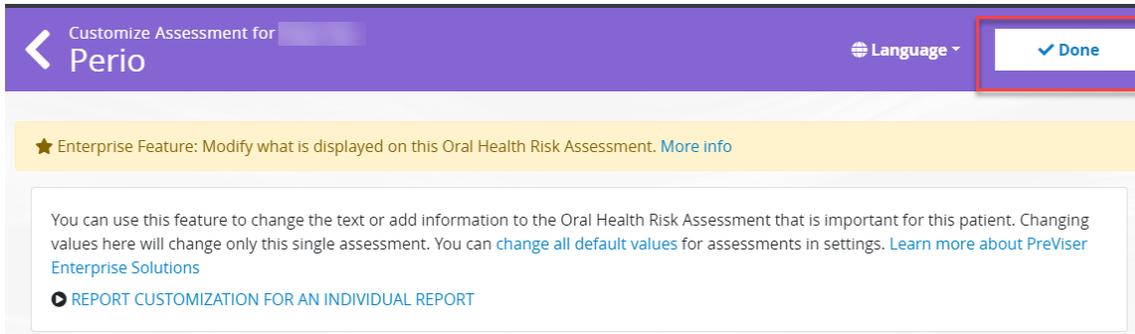
Hide Section
Reset to Default
Cancel
Save

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:



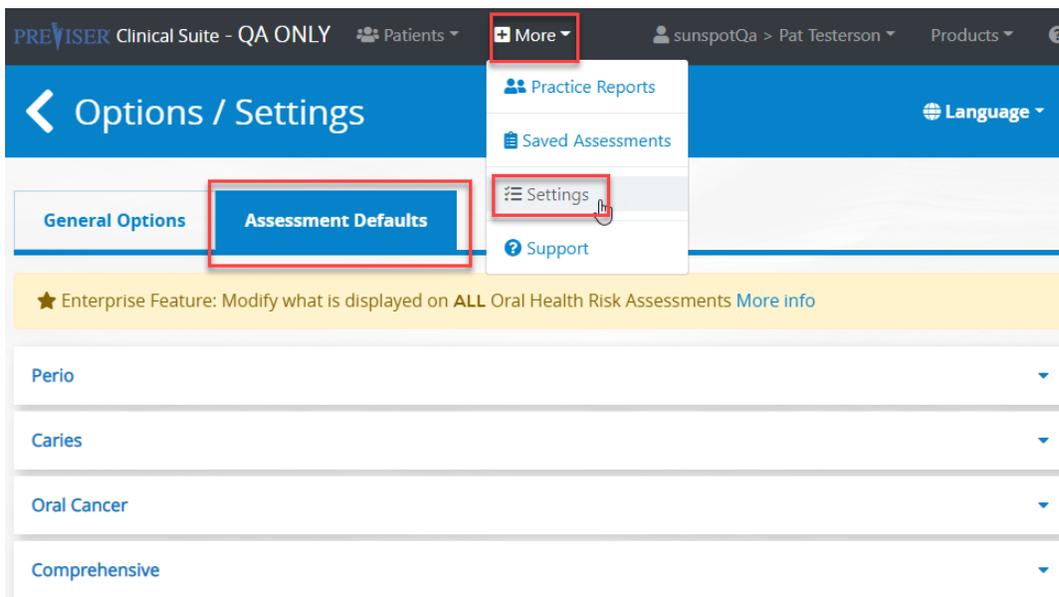
NOTE: Following the steps above will customize only that single report. All other reports will not reflect the customizations.

CUSTOMIZING ASSESSMENT DEFAULTS

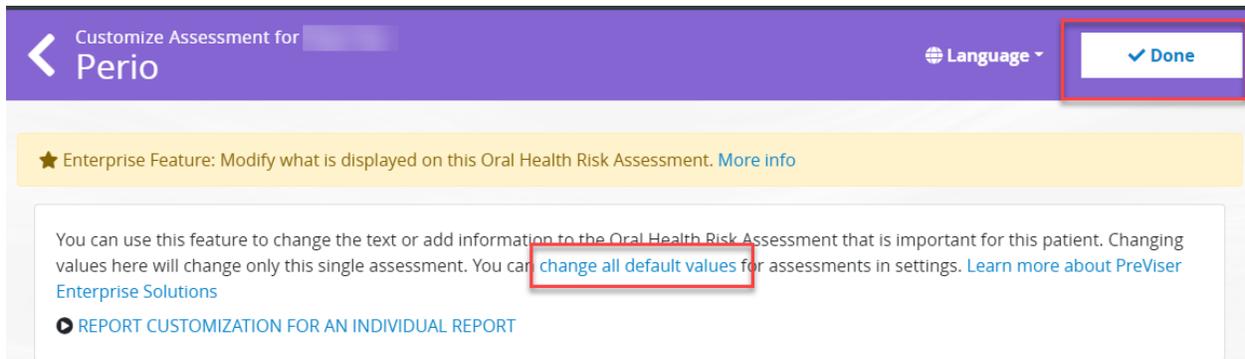
If your practice would like to customize all the assessment reports in the same way as described in the previous section the easiest way to do it is to customize assessment defaults. After the defaults are customized, all the assessments submitted going forward will have the customization.

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

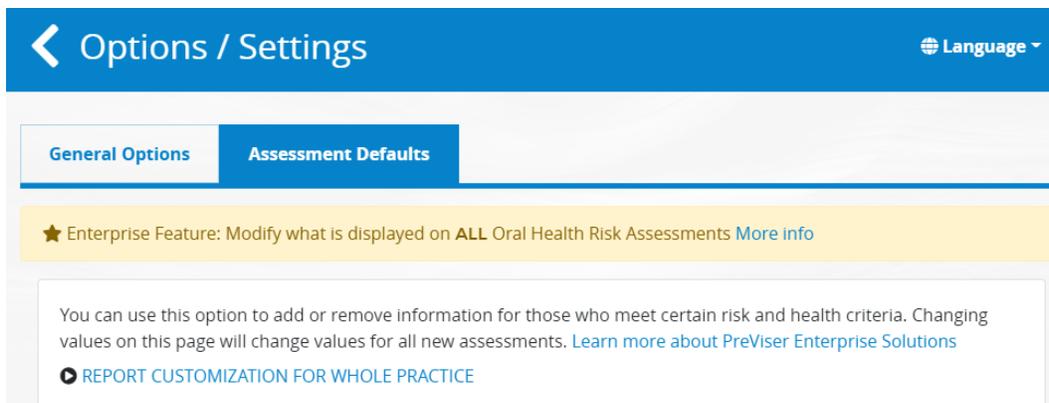
- Click on the *More* drop-down list in the top navigation bar
- Click the *Settings* link
- Click on the *Assessment Defaults* tab



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 *Customize Assessment* page:

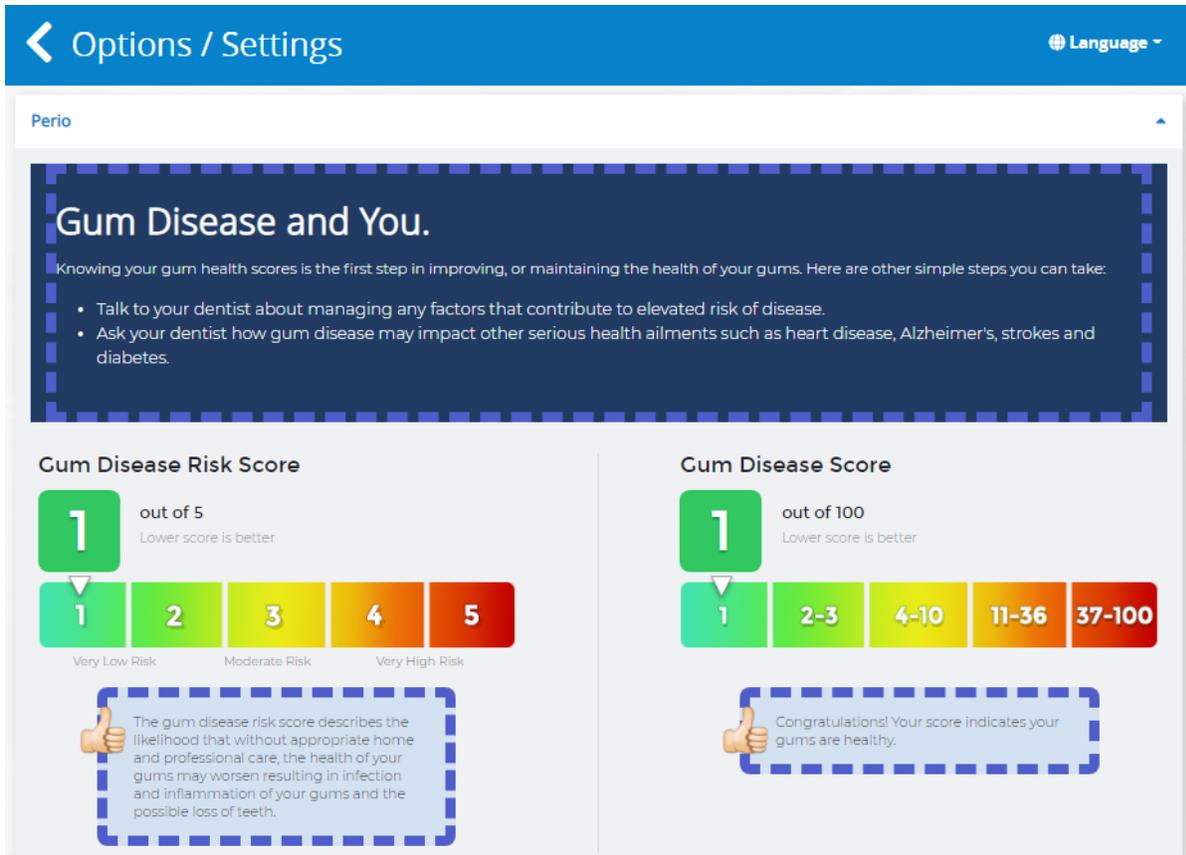


On the *Assessment Defaults* page, click on the *More Info* link in the top section of the page for detailed information on how to customize assessment defaults or watch some videos explaining the feature:

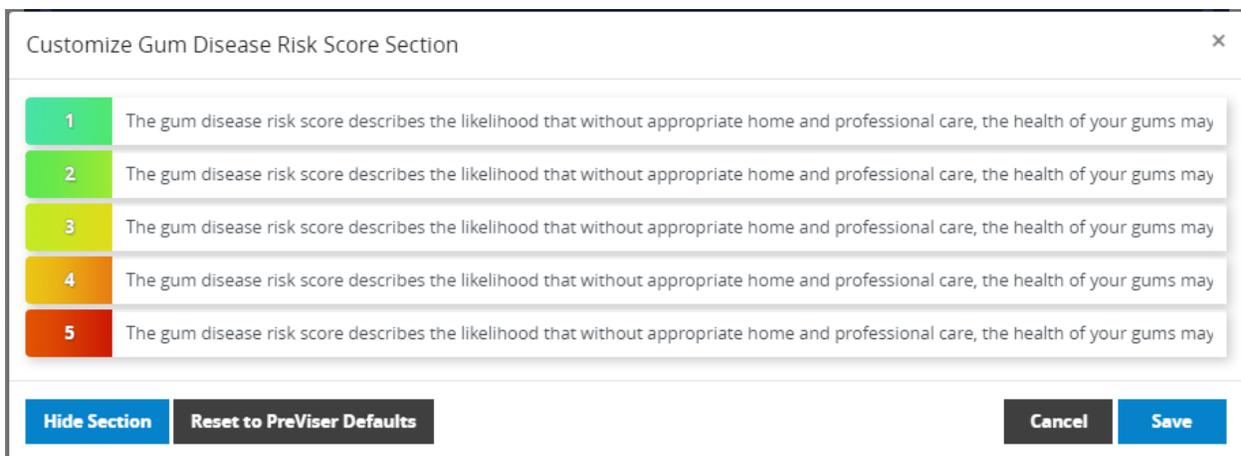


The customizable sections for each report type can be modified by expanding the assessment type section and clicking on the section that needs to be updated.

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.

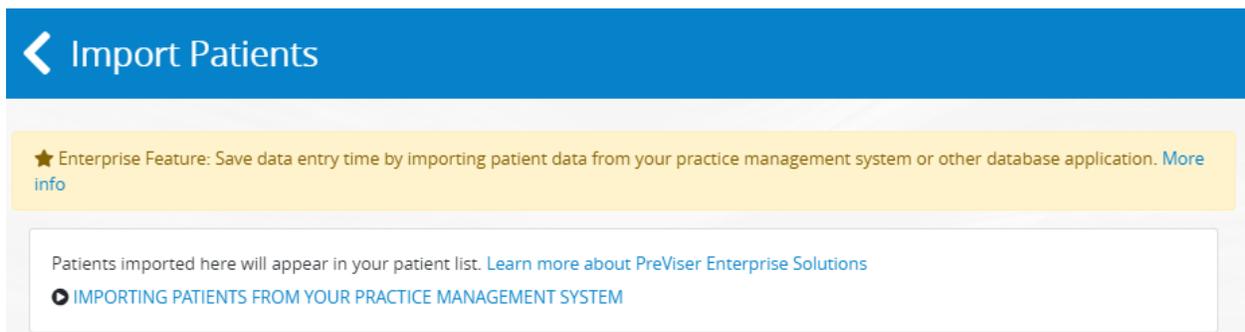
PATIENT IMPORT

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

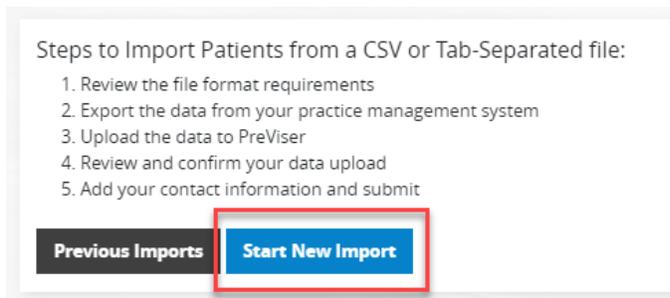
The *Import Patients* page can be accessed in the following way:

- 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.

< New Import
Step 1. Review the file format requirements

PreViser accepts patient imports via CSV or tab-delimited text file uploads

Required fields include:
First Name, Last Name, Date of Birth, Gender Patient Identifies as

Optional fields include:
Email Address, Practice Management Patient ID

[+ More About Fields \(Columns can be in any order, but the following order is preferred\)](#)

[+ Example \(With header row\)](#)

Next

< New Import
Step 2. Export the data from your practice management system

Tips for exporting patient data from your practice management system

- Before you export your file from your practice management system or database application, take a look at their FAQs or support page for instructions on how to save as a CSV or tab-delimited text file. It's a standard export format, but since every application is different, the steps will vary.
- You can also export data as a CSV from most spreadsheet applications.
- After you have a CSV or tab-delimited text file of your patients, open it in a spreadsheet, like Microsoft Excel, to arrange the columns for import into PreViser.

PreViser accepts two types of file formats for importing patient data

- A **CSV** file is a text file with commas separating each column of text. CSV files should end with a .csv extension.
- A **tab-delimited** file is a text file that's set up with a tab separating each column of text. Tab-delimited files should end with either a .txt or .tsv extension.

Note: Each file sent should contain only records from a single practice location. If you have more than one practice location, you should use one CSV per location.

Follow the instructions from your practice management system to create a custom report and export as CSV

- [Dentrix Ascend](#)
- [EagleSoft](#)
- Other (Please consult your system's documentation)

Back

Next

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:

< New Import
Step 3. Upload the data to PreViser

i Choose the CSV or tab-delimited text file that you have exported from your practice management system.

.csv or .txt Data File

File contains header row

< New Import
Step 4. Review and confirm your data upload

i Review the columns and rows below to confirm this is the data that you would like to import into the PreViser Clinical Suite. [More info](#)

Show entries

Row #	↑↓	LName	FName	Gender	BirthDate	PatID	ProvID
1		Testerson	Ariel	F	5/19/1975	5173	XX24

Showing 1 to 1 of 1 entries

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.

< New Import
Step 5. Add your contact information and submit

i Please provide your contact information in case there are any questions regarding your import request.

Name	
Phone	
Email	name@example.com
Practice Management Software	eg. Dentrix Ascend

Back
Submit

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

< Previous Imports

i Please allow 5 business days from the date your request was submitted for processing.

Show 5 entries

Submitted On	Submitted By	Data File Name	Status	Patients Imported
11/17/2021 5:01 PM	Pat Testerson	TestPatientImport_101121.txt	Pending	-

Showing 1 to 1 of 1 entries

Previous
1
Next

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

← **Import Summary (Completed)**
Processed on 06/09/2020 11:02 AM

i This page provides a summary of the data which was imported. [More info](#)

Status
All ▼

Show 5 entries

Row #	Status	First Name	Last Name	Date of Birth	Gender	Email	PMS Patient ID
1	Imported			8/7/1969	F		
2	Invalid				F		
3	Imported			1983-05-16	M		
4	Invalid				F		
5	Imported			9/18/2001	M		

Showing 1 to 5 of 10 entries

 Previous 1 2 Next

Download CSV

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.

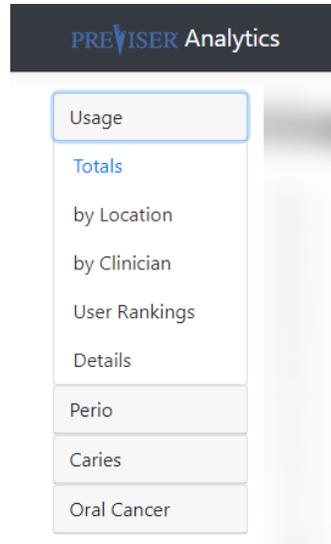
To access PreViser Analytics, click on the *Product* menu on any page of PreViser *MyAccount* or *Clinical Suite 5*:

PREVISER Clinical Suite - QA ONLY
My Account Products ?

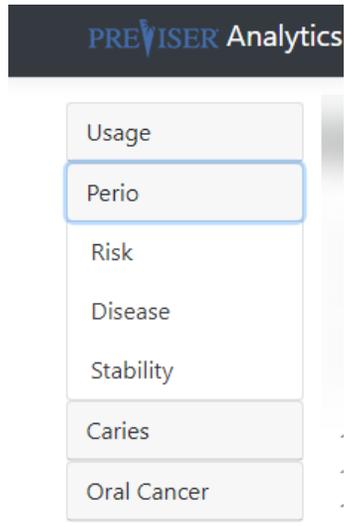
Clinical Suite
Analytics

PreViser Analytics contains two main sections:

Overall clinical assessment usage (reports by clinician or in case of multi-location 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

Filters

01/01/20

to

12/31/20

Chart Type

Line

Grouping

Daily

Status

Complete

First Time

All selected (2)

Type

All selected (4)

Locations

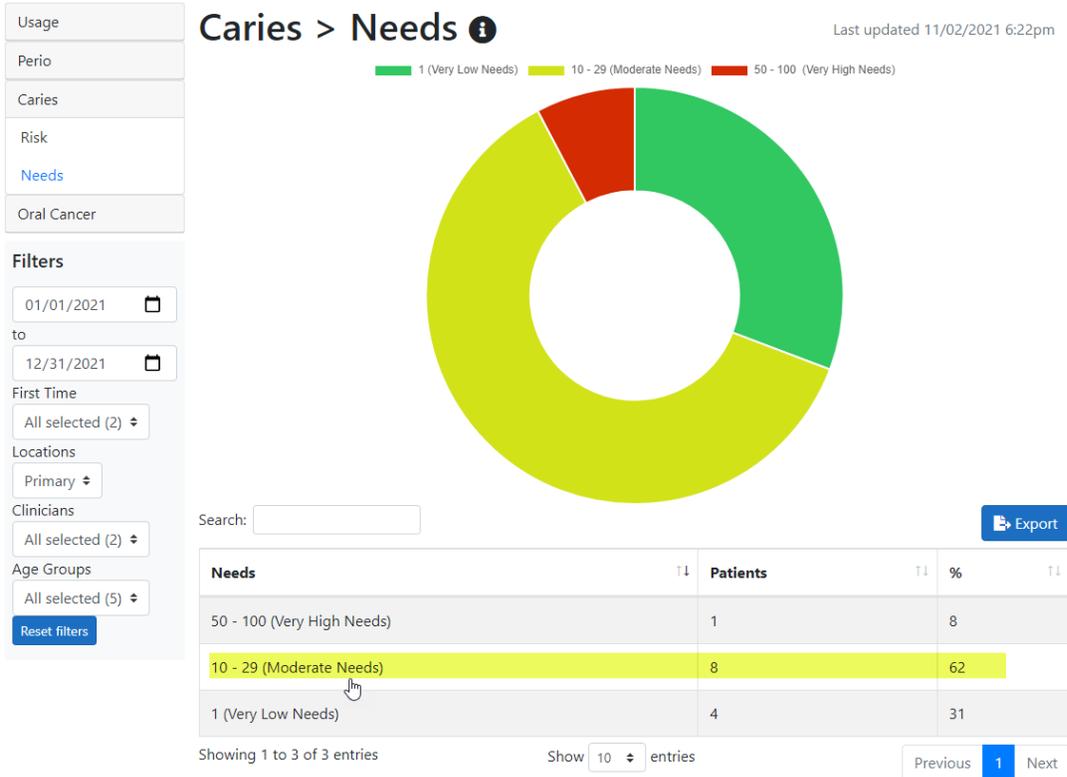
Primary

Clinicians

All selected (2)

[Reset filters](#)

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



PREVISER Analytics Ben Morton > Products ?

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

PREVISER Clinical Suite - QA ONLY Patients + More + august3021 > Products +

Assessment for Sara Tester Perio Language + Edit + Share +



End of August
8504 10-2022
78 PreViser Way
Concord, HI 03303

Exam Information
Prepared For: Sara Tester
Prepared By: [User]
Exam Date: 10/18/2021
Submitted To: PreViser_QA 10/18/2021 5:18 PM

[Check Benefits](#) [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

2 out of 5
* Lower score is better

1

2

3

4

5

Very Low Risk Moderate Risk Very High Risk

The gum disease risk score describes the likelihood that without appropriate home and professional care, the health of your gums may worsen resulting in infection and inflammation of your gums and the possible loss of teeth.

Gum Disease Score

1 out of 100
* Lower score is better

1

2-3

4-10

11-36

37-100

Congratulations! Your score indicates your gums are healthy.

Gum Health Stability Score

1 out of 100
* Higher score is better

The gum health stability score informs whether or not your gum health is stable (unchanged [stable] or worsened condition). The first gum health assessment always results in a score of zero (0). As your gum health is assessed over time, the score will increase by 10 points for every year of gum health stability, reaching a maximum of a score of 100 indicating 10 years of stability. If your gum health worsens, the score will return to a score of zero (0).

What Changed?
The information below shows your scores over time.

Gum Disease Risk Score



Gum Disease Score



To help maintain or improve the health of your gums:

Pockets less than 5mm



Pockets that are less than 5mm deep can have the most thorough removal of bacteria and calculus. However, all deep pockets were at one time less than 5mm with the optimal probing depth being 3mm or less.

Smoking



Smoking can increase severity of gum disease and prevent proper healing after treatment.

Oral hygiene



Oral hygiene is of particular importance to you. You should learn improved methods of maintaining your teeth and gums.

What Can I Do?

Your participation is very important.

The most common behaviors that influence health and treatment success are oral hygiene, nutrition, and smoking. You may receive advice, including resources for you to change to health-promoting behaviors.

Visit the dentist more frequently.

Regular visits to the dentist to detect disease in the early stages can prevent more complex and expensive treatment. Better still are regular visits for preventative care targeted to your risk factors.

Your Clinical Access Code: FFHM1MCQGG

Privacy End User License Agreement Copyright PreViser 2009-2021 All Rights Reserved

PreViser Corporation Company Proprietary

65 | Page

CARIES REPORT

PREVISER Clinical Suite - QA ONLY
Patients ▾ More ▾
August 2021 ▾
Products ▾

Assessment for Sara Tester
Language ▾
Edit ▾
Share ▾



End of August
(804) 81-2222
75 PreViser Way
Concord, HI 03303

Exam Information
 Prepared For: Sara Tester
 Prepared By: Sara Tester
 Exam Date: 10/25/2021
 Submitted To: PreViser QA 10/25/2021 8:31 AM

Check Benefits
Home Care Report
Clinical Inputs

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

- Talk to your dentist about managing the risk factors that may contribute to tooth decay
- Brush twice a day with fluoride toothpaste
- Clean between your teeth daily with floss or an interdental cleaner

Tooth Decay Risk Score

5

out of 5

* Lower score is better

1

2

3

4

5

Very Low Risk
Moderate Risk
Very High Risk

⚠ The tooth decay risk score describes the likelihood that, without appropriate home and professional care, the health of your teeth may worsen, resulting in tooth decay or breakdown of existing restorations.

Restorative Needs Score

20

out of 100

* Lower score is better

1

2-9

10-29

30-49

50-100

Very Low Needs
Moderate Needs
Very High Needs

Your score indicates that you have some active tooth decay or some existing restorations that may be failing. Your dental professional can advise you on the best strategy to correct this situation.

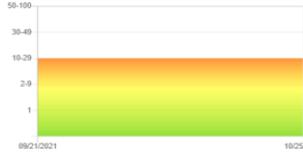
What Changed?

The information below shows your scores over time.

Tooth Decay Risk Score



Restorative Needs Score



To help maintain or improve the health of your teeth:

Prevention - active intervention

Prevention is based on risk and risk factors. This is treatment before disease is observed. Repair of the effects of disease rarely results in a condition as good as the original state. Preventing disease eliminates tooth loss and reparative treatment.

Communication

Dental treatment cannot keep you healthy; your participation is very important. The most common patient behaviors that influence health and treatment success are oral hygiene, nutrition, and smoking. You may receive advice, including resources for you to change to health-promoting behaviors.

Visit the dentist

Symptoms are warning signs that frequently appear too late in the disease process for the simplest, most predictable, and least costly treatment. Regular visits to the dentist to detect disease in the early stages can prevent more complex and expensive treatment. Better still are regular visits for preventive care targeted to your risk factors.

Oral hygiene

Oral Hygiene is of particular importance to you. You should learn improved methods of maintaining your teeth and gums.

What Can I Do?

Your participation is very important.

The most common behaviors that influence health and treatment success are oral hygiene, nutrition, and smoking. You may receive advice, including resources for you to change to health-promoting behaviors.

Visit the dentist more frequently.

Regular visits to the dentist to detect disease in the early stages can prevent more complex and expensive treatment. Better still are regular visits for preventative care targeted to your risk factors.

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ORAL CANCER REPORT

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Exam Information
 Prepared For: Sara Tester
 Prepared By: [Redacted]
 Exam Date: 10/25/2021
 Submitted To: PreViser QA 10/25/2021 9:16 AM

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Oral Cancer and You.

Am I at risk?

Anyone can get oral cancer. The most common factors for oral cancer are:

- Over 40 years of age
- Use of any type of tobacco product
- Regularly drink alcohol
- Exposure to the HPV virus

How do I reduce my risk?

Lifestyle factors like tobacco, alcohol use and poor dental hygiene can be managed with a subsequent reduction in the risk of mouth cancer. In addition, recent research has indicated that exposure to the HPV 16 virus that can be sexually transmitted is a significant risk factor for oral cancer, and may be responsible for the increasing incidence of mouth cancers in younger populations.

Oral Cancer Risk Score

1 out of 5
Lower score is better

1

2

3

4

5

very low risk Moderate risk Very high risk

The oral cancer risk score describes the probability of developing mouth cancer as a result of your individual risk factors. These can include inherited factors as well as lifestyle factors.

What Changed?

The information below shows your scores over time.

Oral Cancer Risk Score

To help reduce your risk of oral cancer:

Restrict or eliminate tobacco use

Tobacco use of any kind (e.g. cigarettes, cigars, pipe or chewing tobacco) increases the risk of developing oral cancer. It is thought that chemicals in tobacco can damage the soft tissue of the mouth and this damage can lead to cancer. If you use tobacco and drink alcohol, the combinations of these activities can increase your risk of developing mouth cancer by up to 40 times when compared to those who neither smoke nor drink alcohol. If you wish to quit smoking and need help, your dental professional can advise you on effective strategies that may include drugs specifically designed to help people quit tobacco use, or counseling to help manage addiction.

Reduce alcohol use

The degree to which alcohol use can increase your risk of oral cancer is determined by how much and how frequent you drink. If you drink more than three alcoholic beverages a week, your risk will increase slightly. If you drink two or more alcoholic beverages daily your risk is significantly increased.

What Can I Do?

Your participation is very important.

The most common behaviors that influence health and treatment success are oral hygiene, nutrition, and smoking. You may receive advice, including resources for you to change to health-promoting behaviors.

Visit the dentist more frequently.

Regular visits to the dentist to detect disease at the early stages can prevent more complex and expensive treatment. Better still are regular visits for preventative care targeted to your risk factors.

When to seek help

If you notice a red or white patch, ulcer, lump, or pain in your mouth that lasts longer than three weeks, it is good idea to point this out as soon as possible to your dental professional. Don't put this off. The longer you wait the more complex and expensive the treatment can become, and if the problem is cancer, the worse your outcome may be.

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Additional Resources

There are many public resources available if you have questions about oral cancer, quitting tobacco, or limiting your alcohol consumption. Here are just a few:

Smokefree
smokefree.gov

Oral Cancer Foundation
oralcancerfoundation.org

National Cancer Institute
www.cancer.gov/types/head-and-neck

American Cancer Society
www.cancer.org/cancer/oral-cavity-and-oropharyngeal-cancer.html

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COMPREHENSIVE REPORT

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

upper

Oral Disease and You
There are three major oral diseases:

- Tooth decay
- Gum disease
- Oral cancer

Tooth Decay Risk Score
5 out of 5
* Lower score is better

Restorative Needs Score
10 out of 100
* Lower score is better

Gum Disease Risk Score
1 out of 5
* Lower score is better

Cum Disease Score
1 out of 100
* Lower score is better

Gum Health Stability Score
0 out of 100
* Higher score is better

Oral Cancer Risk Score
3 out of 5
* Lower score is better

lower

To help maintain or improve the health of your teeth:

Prevention - active intervention
Prevention is based on risk and risk factors. This is treatment before disease is observed. Repair of the effects of disease rarely results in a condition as good as the original state. Preventing disease eliminates tooth loss and reparative treatment.

Communication
Dental treatment cannot save you healthy. Your participation is very important. The most common patient behaviors that influence health and treatment success are oral hygiene, nutrition and smoking. You may receive advice, including resources for you to change to health-promoting behaviors.

Visit the dentist
Symptoms are warning signs that frequently appear too late in the disease process for the simplest, most predictable, and least costly treatment. Regular visits to the dentist to detect disease in the early stages can prevent more complex and expensive treatment. Better still are regular visits for preventive care targeted to your risk factors.

Oral hygiene
Oral Hygiene is of particular importance to you. You should learn improved methods of maintaining your teeth and gums.

To help maintain or improve the health of your gums:

Pockets less than 5mm
Pockets that are less than 5mm deep can have the most thorough removal of bacteria and calculus. However, all deep pockets were at one time less than 5mm with the optimal probing depth being 3mm or less.

Oral hygiene
Oral Hygiene is of particular importance to you. You should learn improved methods of maintaining your teeth and gums.

Options you should consider:

Restrict or eliminate tobacco use
Tobacco use of any kind (in cigarettes, cigars, pipe or chewing tobacco) increases the risk of developing oral cancer. It is thought that chemicals in tobacco can damage the soft tissue of the mouth and this damage can lead to cancer. If you use tobacco and drink alcohol, the combination of these activities can increase your risk of developing mouth cancer by up to 40 times when compared to those who neither smoke nor drink alcohol. If you wish to quit smoking and need help, your dental professional can advise you on effective strategies that may include drugs specifically designed to help people quit tobacco use, or counseling to help manage addiction.

Reduce alcohol use
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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.

What Can I Do?

Your participation is very important.
The most common behaviors that influence health and treatment success are oral hygiene, nutrition, and smoking. You may receive advice, including resources for you to change to health-promoting behaviors.

Visit the Dentist more frequently.
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When to seek help
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Additional Resources
There are many public resources available if you have questions about oral cancer, quitting tobacco, or limiting your alcohol consumption. Here are just a few:

- Smoke Free Living**
smokefree.gov
- Oral Cancer Foundation**
www.oralcancerfoundation.org
- National Cancer Institute**
www.cancer.gov/oralcan/ncip/ncip.html
- American Cancer Society**
www.cancer.org/oralcan/oralcan/ncip/oralcan.html

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