Consult-PRO™

YOUR DENTAL SOFTWARE SOLUTION

USER MANUAL

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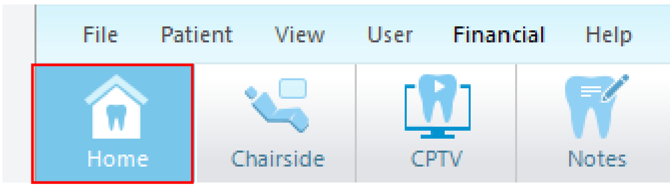
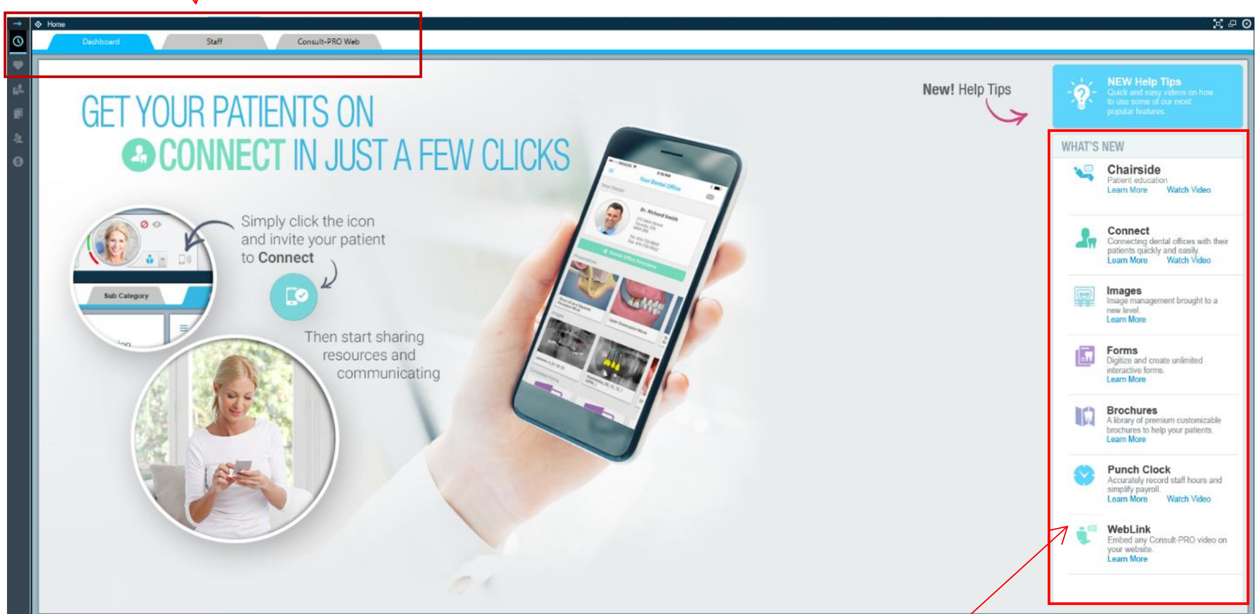
Overview

Home and Overview

The Home Screen is the central hub for the Consult-PRO. You can learn about new products, as well as access our website. Get to the **Home screen** by clicking the **Home** button.



Tabs for Staff and Consult-PRO Website



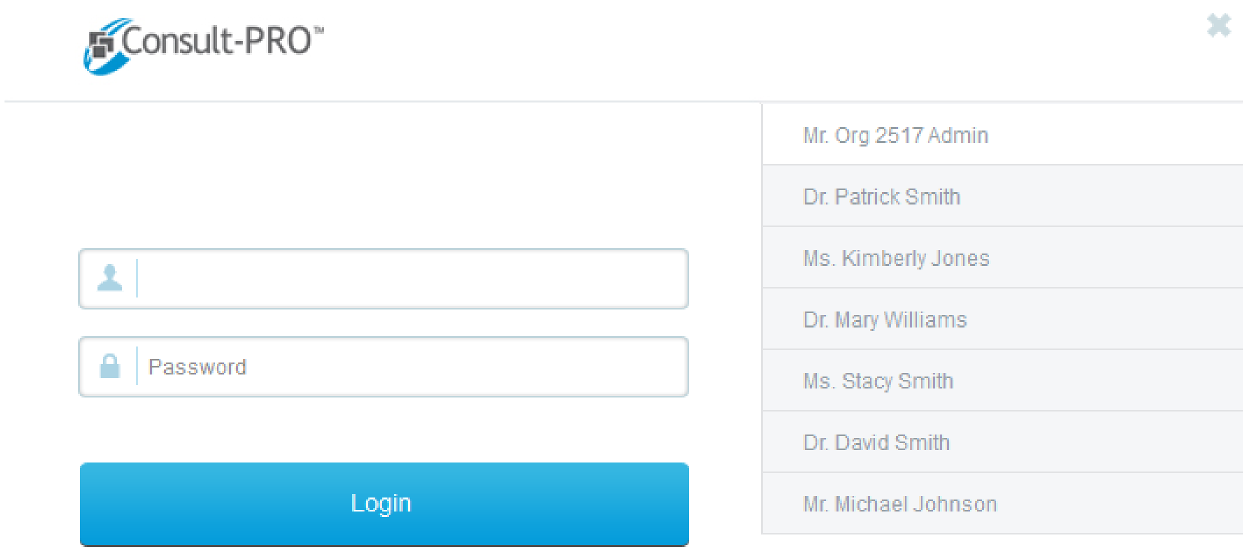
Links to information about our products

Manage Users

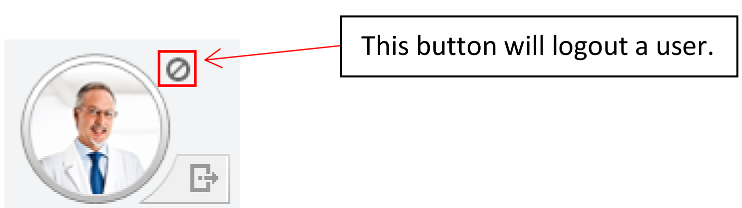
Logging In

To log in, click the **User Login** button.

You will see the following pop up menu.



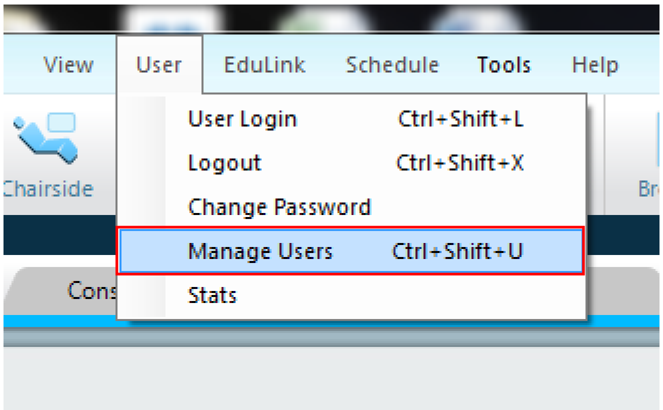
A list of recent users will be displayed in the right pane. You may select the user from the right pane or enter your username and password in the left pane. The administrator login information will be enclosed in the activation email you received to install Consult-PRO Cloud. You should now be logged in. The **User Login** button portrait will change to reflect this.



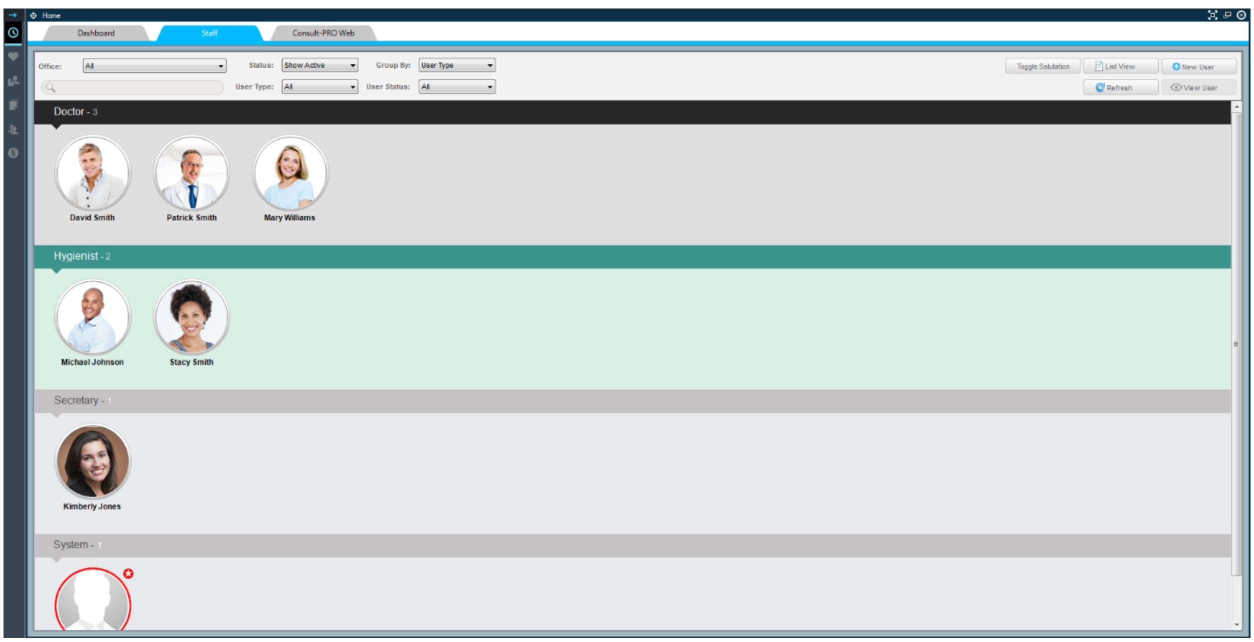
Manage Users

Create or Modify Users

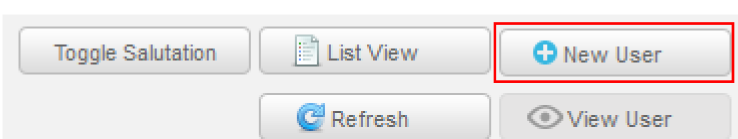
Please login as the administrator to use **Manage Users**. To create or manage your user accounts, click **User** located at the top of the screen and select **Manage Users**.



You will be taken to the user management screen.

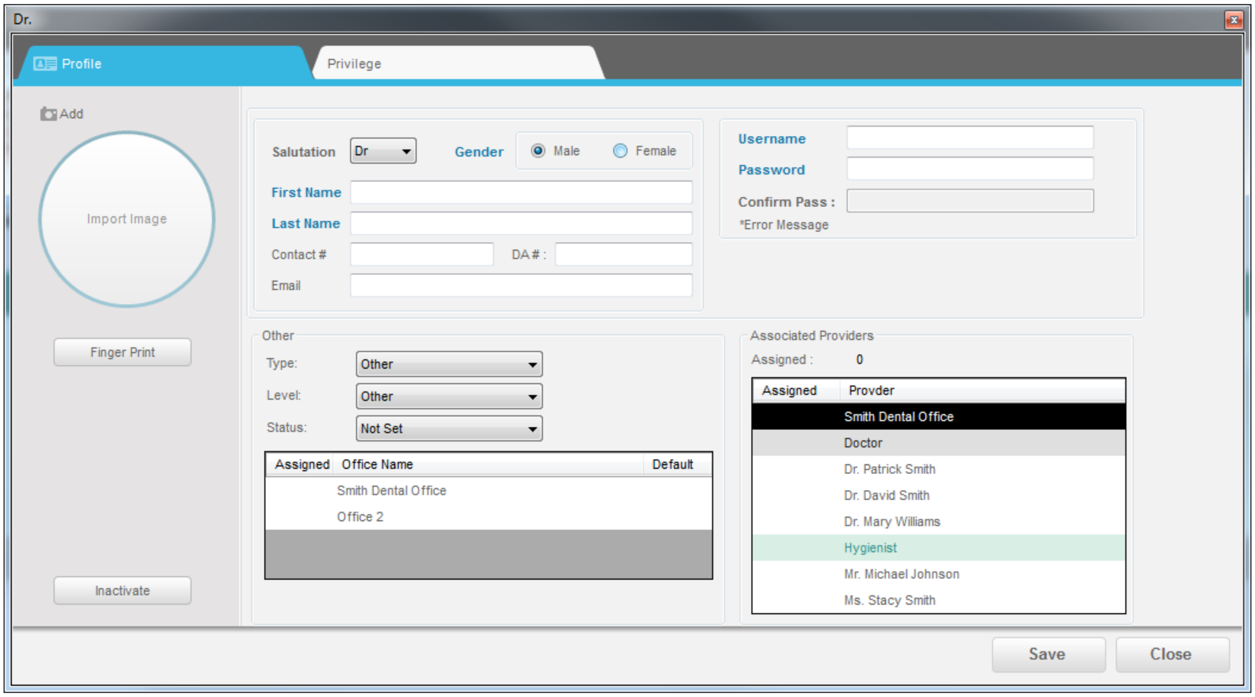


All users will be displayed in this menu. To modify a user's profile, double click the user's image. If you want to create a new user, click the **New User** button located in the upper right corner.



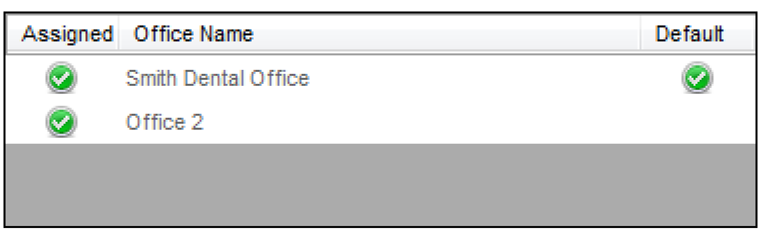
Manage Users

You will now see the **User Creation** screen.



You will need to fill out the fields highlighted in blue in the **Profile** tab. The other fields are optional. We recommend you fill out as much information as possible. Setting user type will be useful in organizing your staff in Consult-PRO. The password for your user must be at least 8 characters in length and include at least one number.

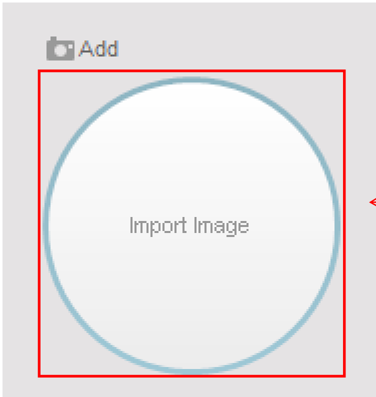
If you have multiple offices, you must select each office you want the user to access. Click beside the office name in the “Assigned” column to assign this user to that office. A green button with a checkmark inside indicates it has been assigned.



Assigned	Office Name	Default
✔	Smith Dental Office	✔
✔	Office 2	

You can import an image for the user’s portrait from your computer by clicking the **Import Image** button.

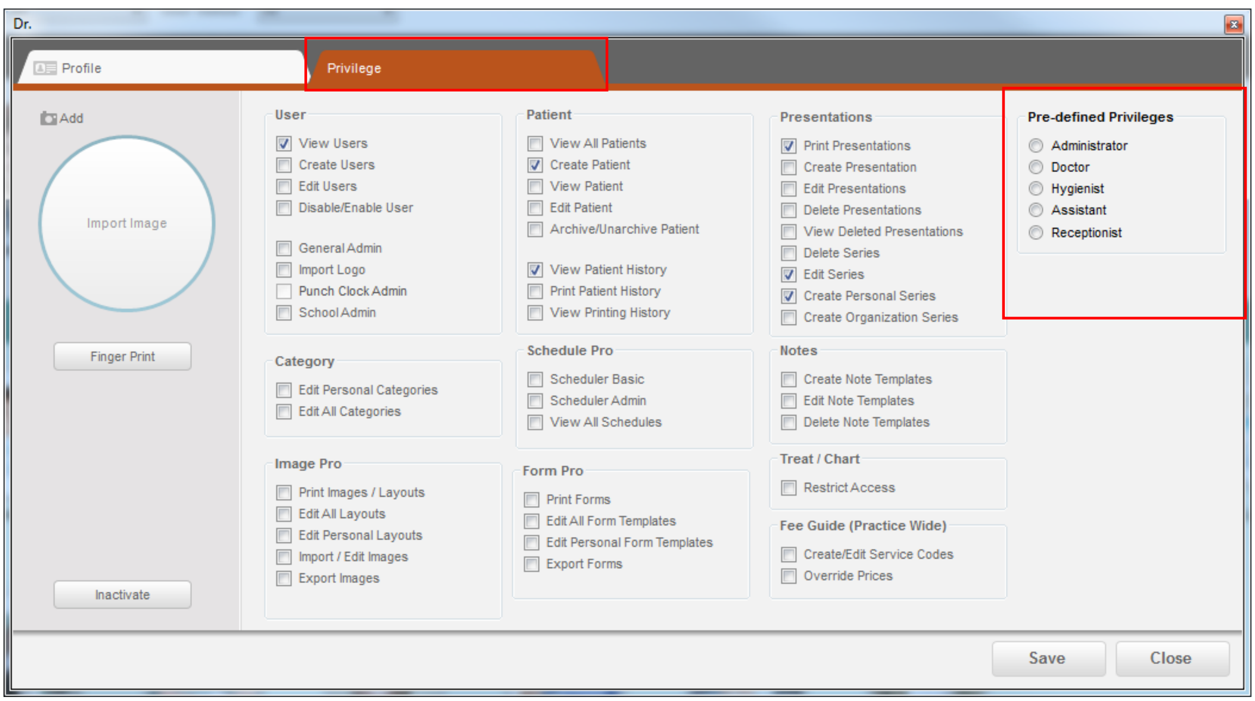
Manage Users



Click here to import an image for the user.

Setting Privileges

Click the **Privilege** tab. This will allow you to define what the user you are creating can and cannot do in the application.



If you wish to quickly define privileges for a user, you can use the **Pre-Defined Privileges** box located in the top right of the privilege tab.

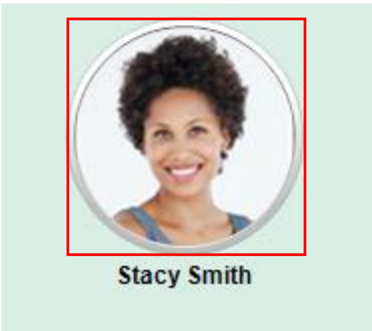
If these pre-defined privileges do not fit the criteria of your user, you can select the privilege boxes manually to grant or revoke a permission.

Click **Save** when complete to create the user.

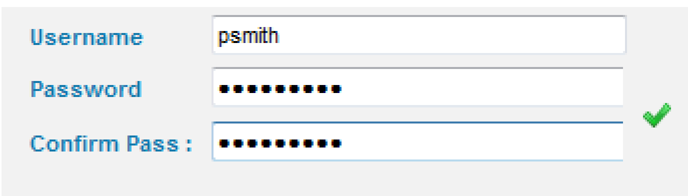
Manage Users

Changing Username or Password

Double click the user’s profile image from the user management screen.



Enter a new username or password.

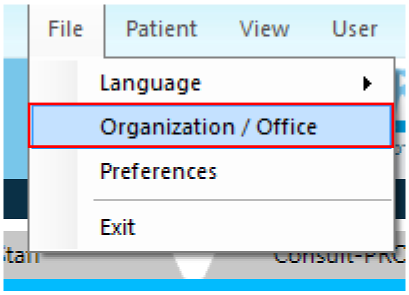


Click **Save** when complete.

Office & Organization Setup

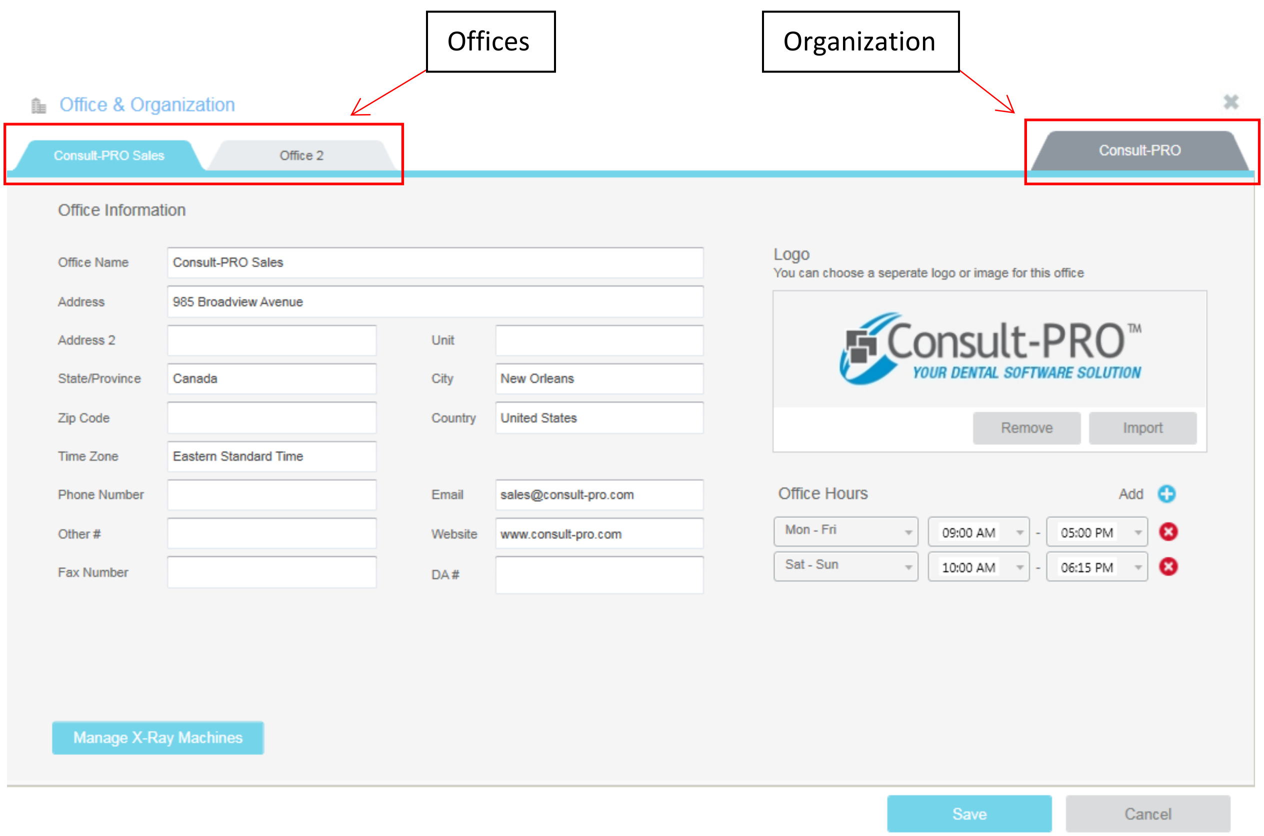
Setting Office & Organization Information

Click **File** and select **Organization/Office**.



The Office & Organization window will pop up. Fill out as much information as possible. This information is useful throughout the application where organization and office information are automatically populated.

To add office hours, click the **Add** button to add a row. Use the drop-down menus and up and down arrows to set the day and time.

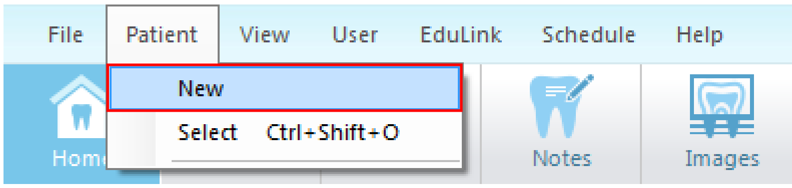


Click **Save** when complete.

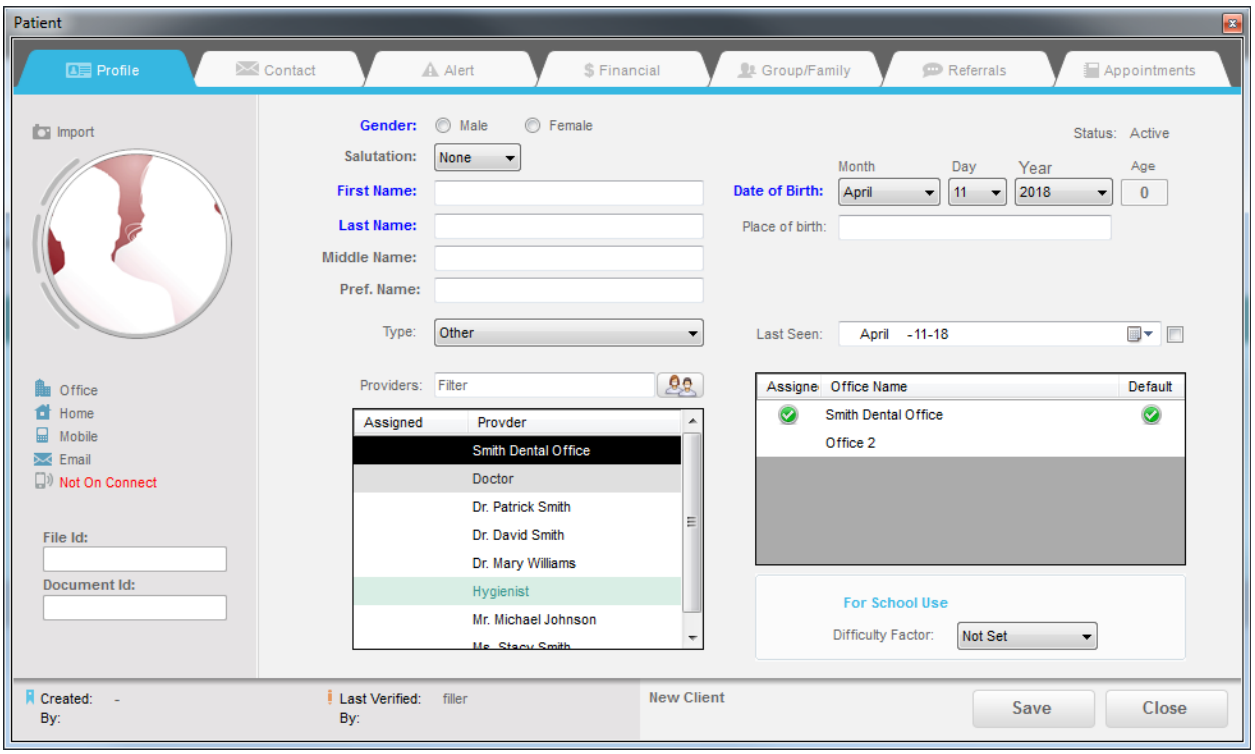
Patient Profiles

Creating Patient Profiles

Please login as the administrator or a user with adequate privileges. Click the **Patient** button and select **New.**



You will be taken to the **Patient Profile** creator.



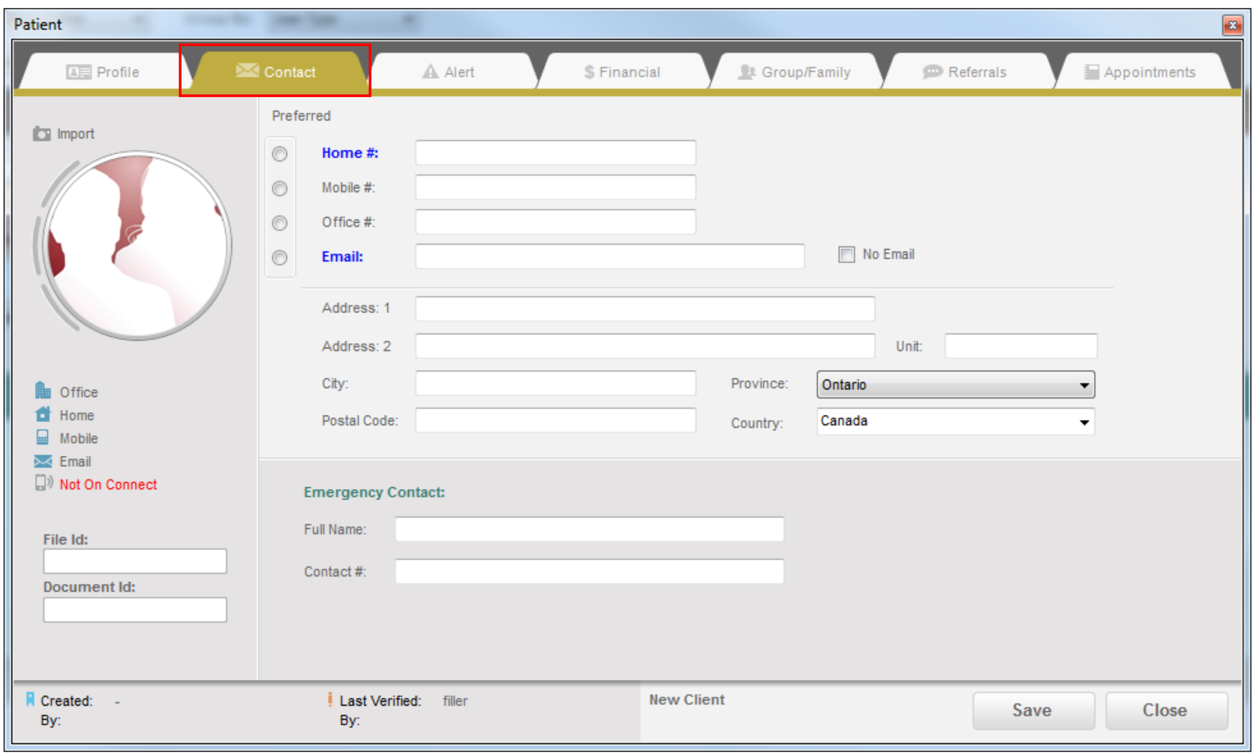
The first tab you will see is the **Profile** tab. Much like the **User** creation tool, mandatory fields for a **Patient Profile** are highlighted in blue. Please assign provider(s) and office(s) by clicking beside the provider/office name in the "Assigned" column.

Patient Profiles

You can add a patient profile image in the same manner as you did for a user. Click the **Image Button** and import an image from your computer.

Click here to import an image for the patient.

After you have completed filling out the **Profile** tab, click the **Contact** tab.



Patient Profiles

You will see the remaining mandatory information to complete a **Patient Profile** highlighted in blue.

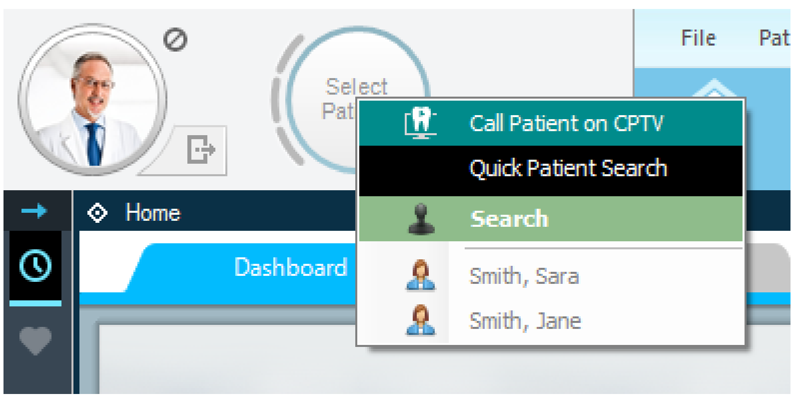
Fill out these fields with the patient's information. If the patient does not have an email address, click the **No Email** box.

Click **Save** when complete to finish creating the patient profile.

Logging in a Patient

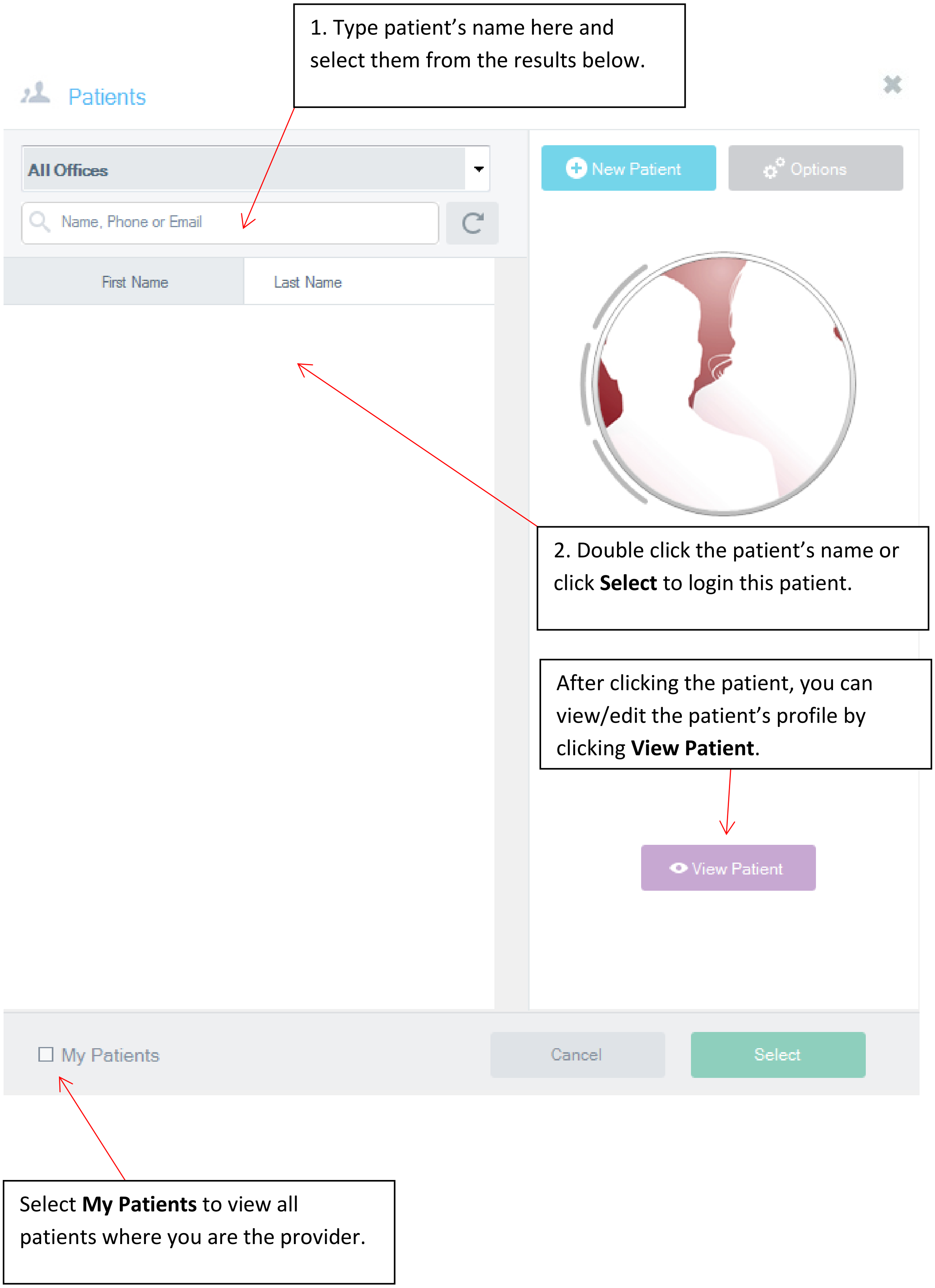
To log in a patient, click **Select Patient** with a user logged in.

Select a patient's name from the recent menu or select **Search.**



Patient Profiles

Patient Search Window:

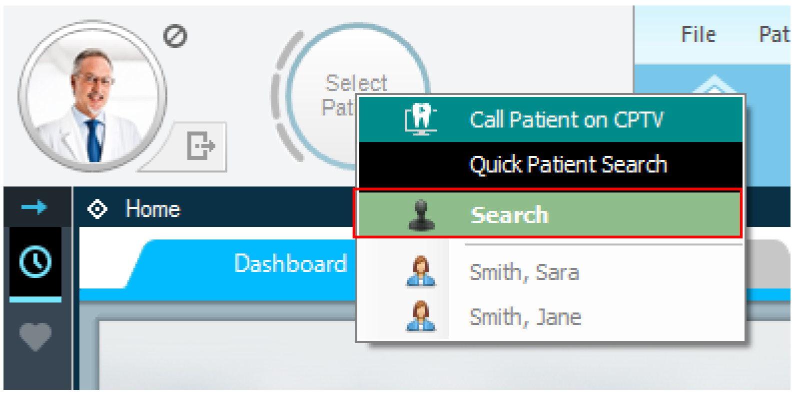


Patient Profiles

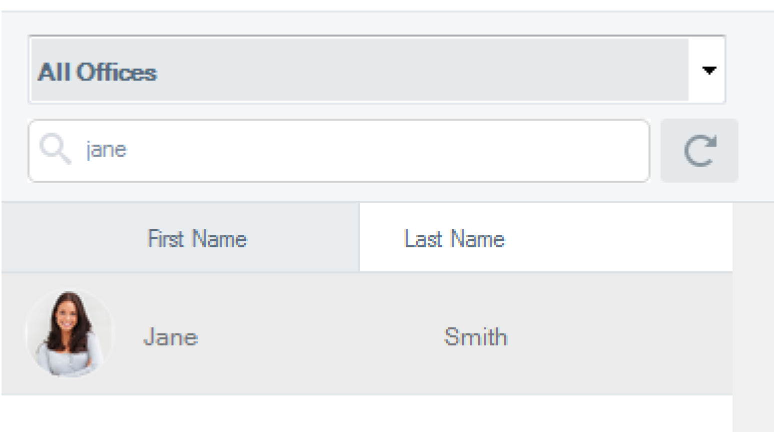
Archiving a Patient

Click **Select Patient** with a user logged in.

Click **Search.**



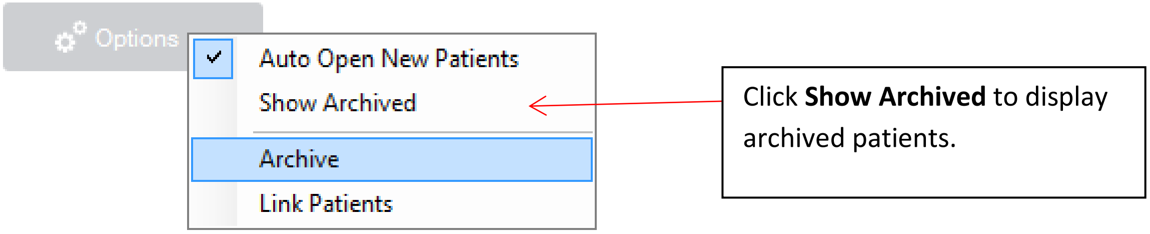
Enter the patient's name and select the patient.



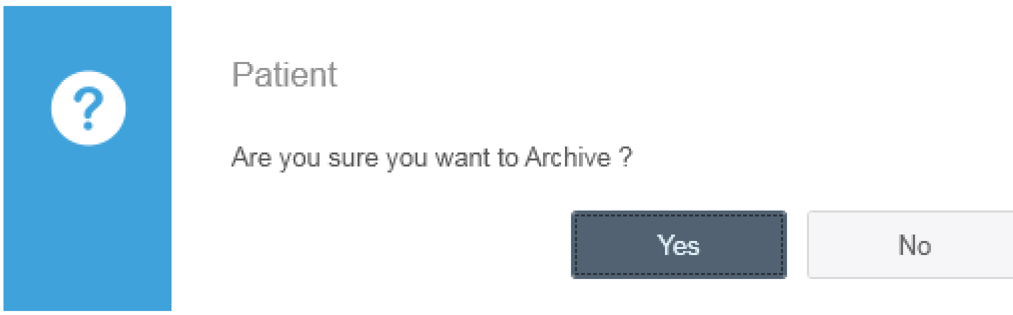
Selected users will be highlighted in grey.

Patient Profiles

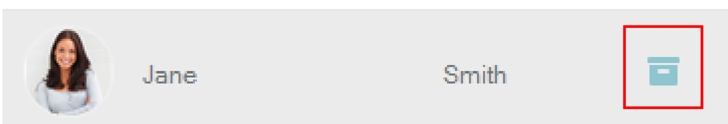
Click **Options** and select **Archive**.



Click **Yes** to archive the patient.

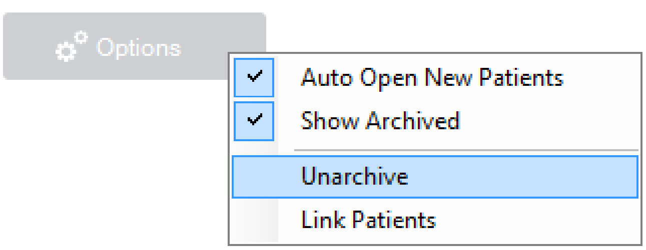


The patient will now be flagged with an archived icon.



Unarchiving patients can be achieved in the same manner as archiving patients.

Ensure **Show Archived** is enabled in options. Select the patient, click **Options** and select **Unarchive**.



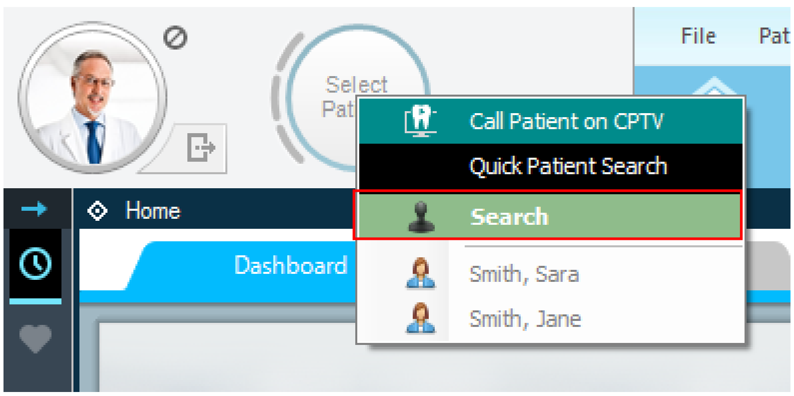
Patient Profiles

Linking Patients

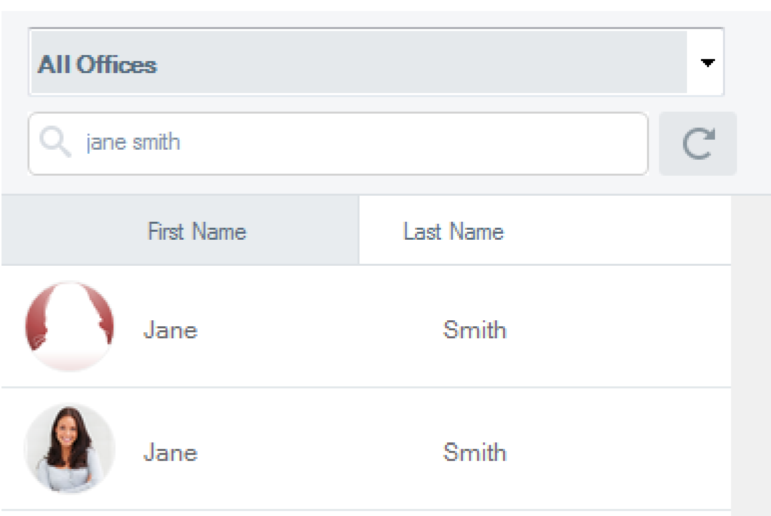
If you have accidently created the same patient twice, you can link both accounts to one primary account. This is useful when you have two patients with data imported for them in separate profiles.

Click **Select Patient** with a user logged in.

Click **Search.**

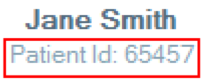


Enter the patient's name.

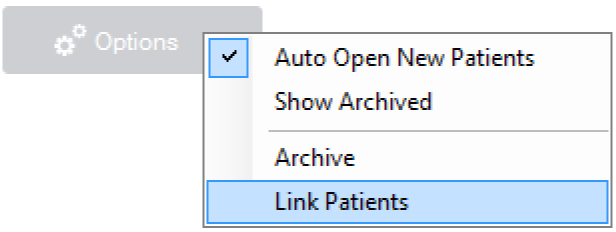


Single click each patient. Take note of each of their patient ids as it is useful for the linking step.

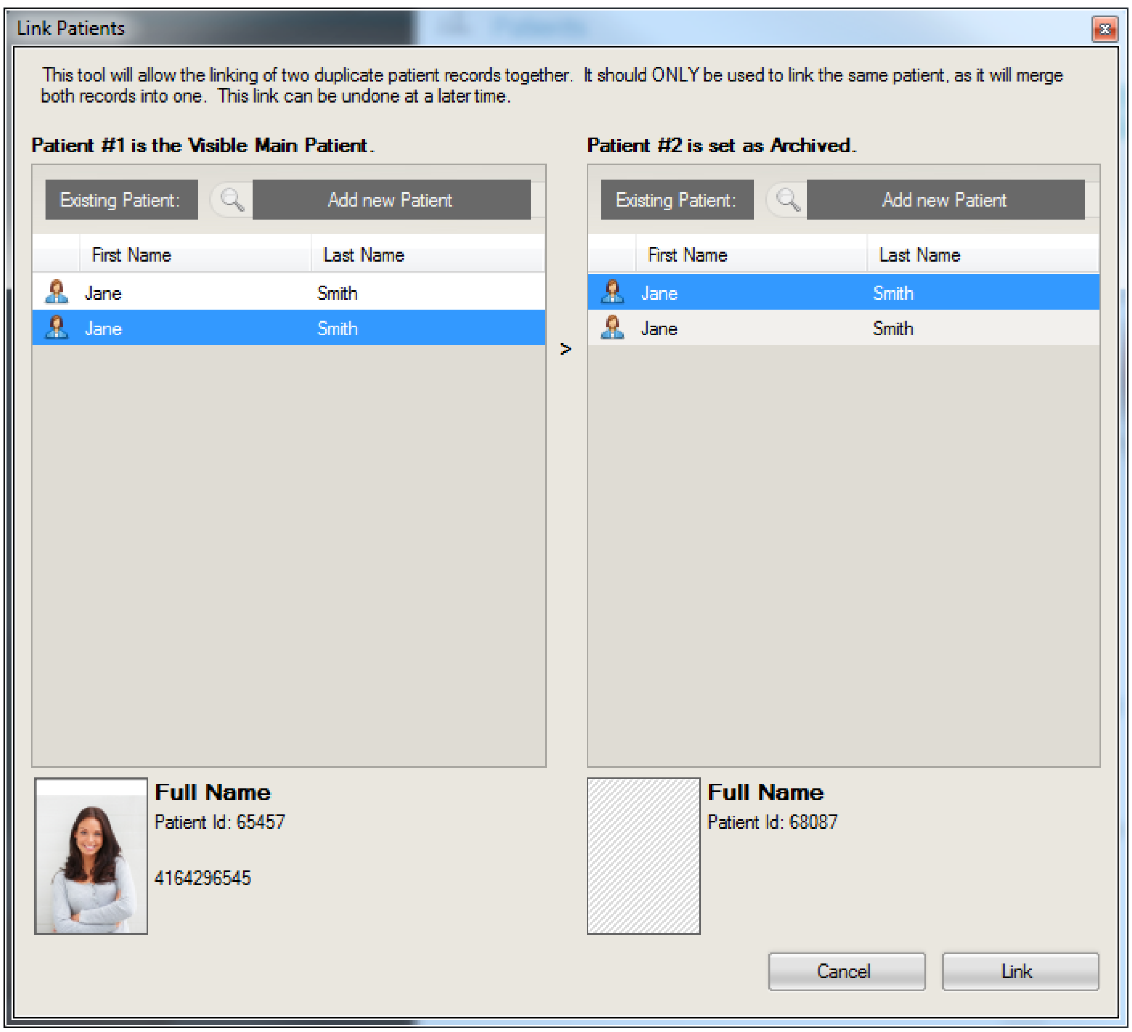
Patient Profiles



Click **Options** and select **Link Patients**.



Select the main patient on the left, and the duplicate patient on the right.

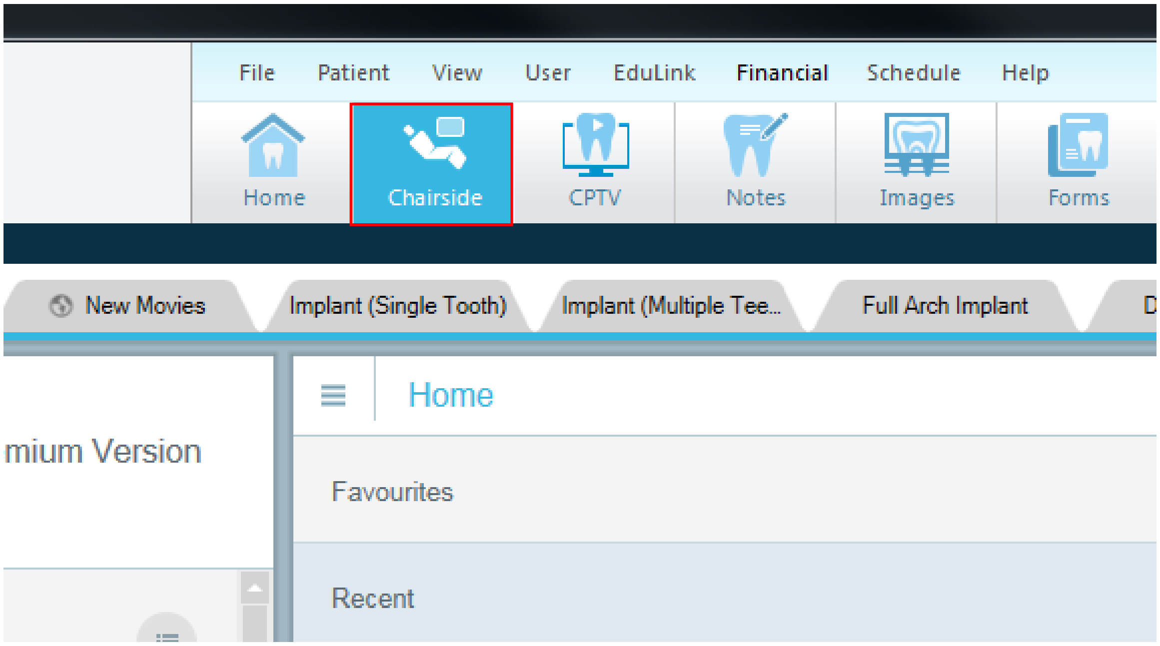


Click **Link** when complete to link the patients.

Chairside

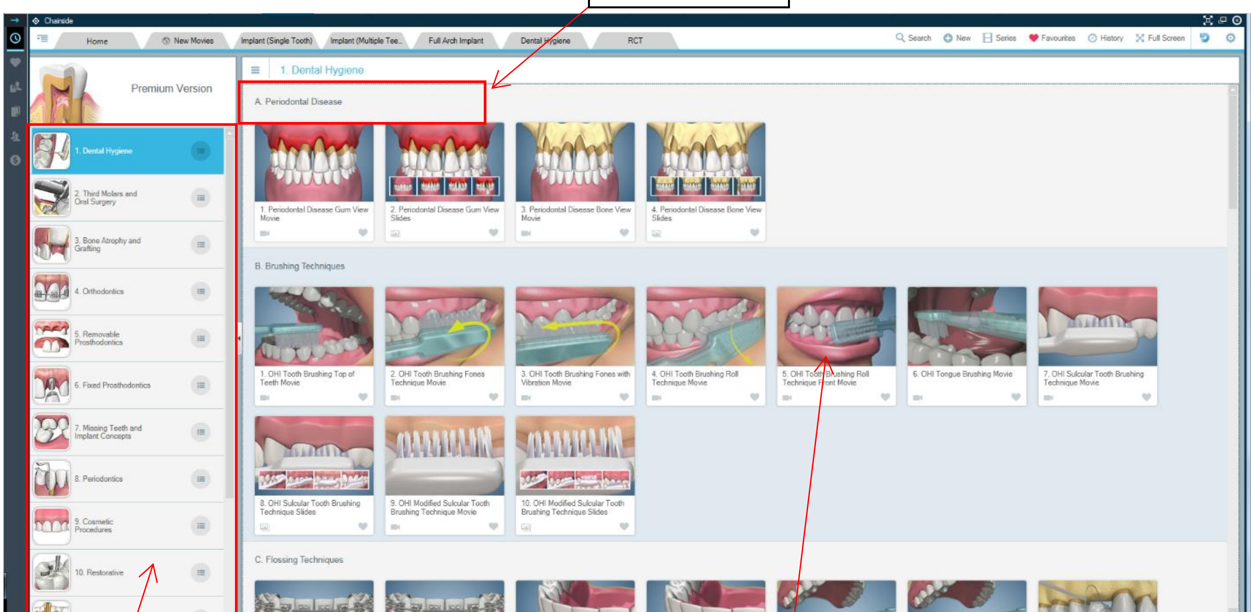
Navigating Chairside

Click the **Chairside** button.



The following screen will display:

Sub Category



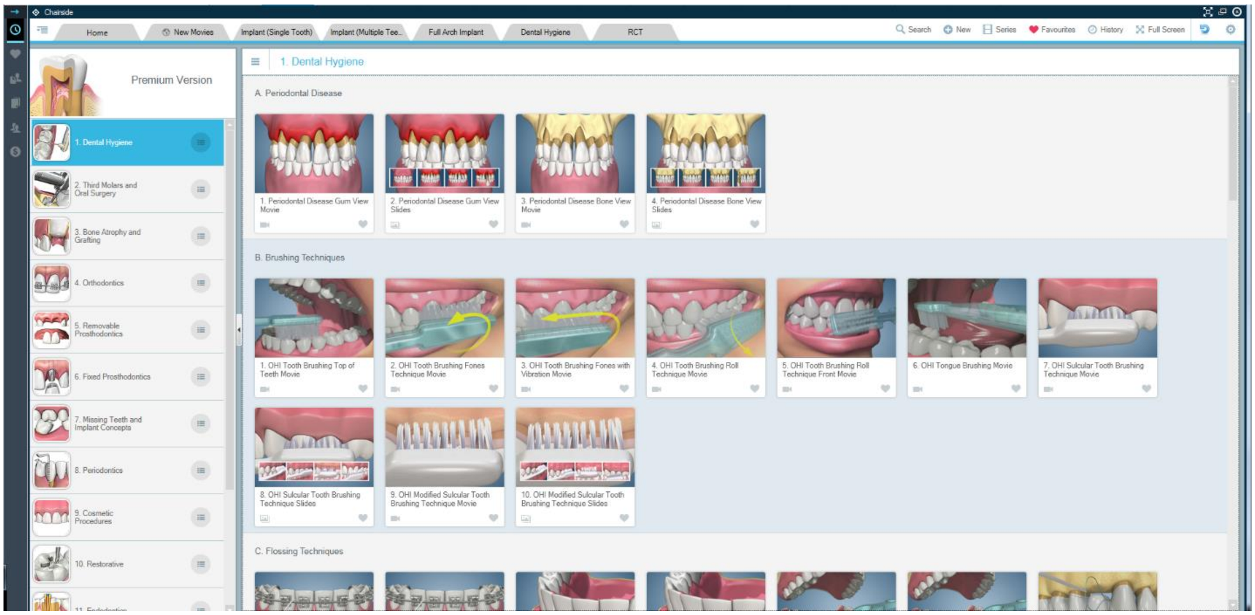
Presentation Categories

Presentation

Chairside

Once you click a presentation category, the window to the right will populate with all the presentations in that category.

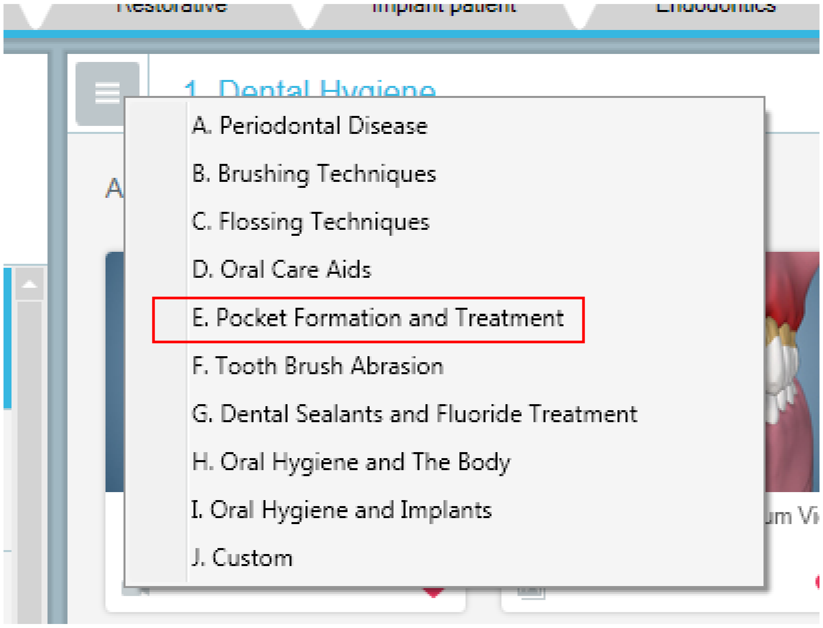
Selecting the **Dental Hygiene** category will display the following:



We can now look at all the presentations in the **Dental Hygiene** and navigate through them in several different ways. Using your mouse wheel, you can scroll up and down to view all the presentations. Additionally, you can click the following menu button to quickly navigate to a subcategory**.**

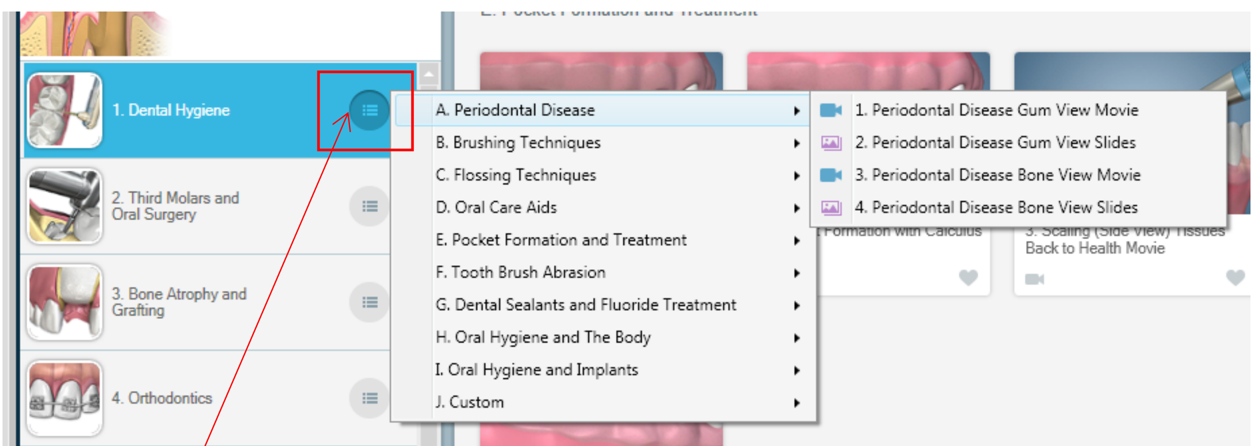
Chairside

After you click the menu button, you will see all the subcategories in the presentation category. For **Dental Hygiene,** you will see the following:



You will see that the presentation preview has automatically scrolled to the **Pocket Formation and Treatment** category.

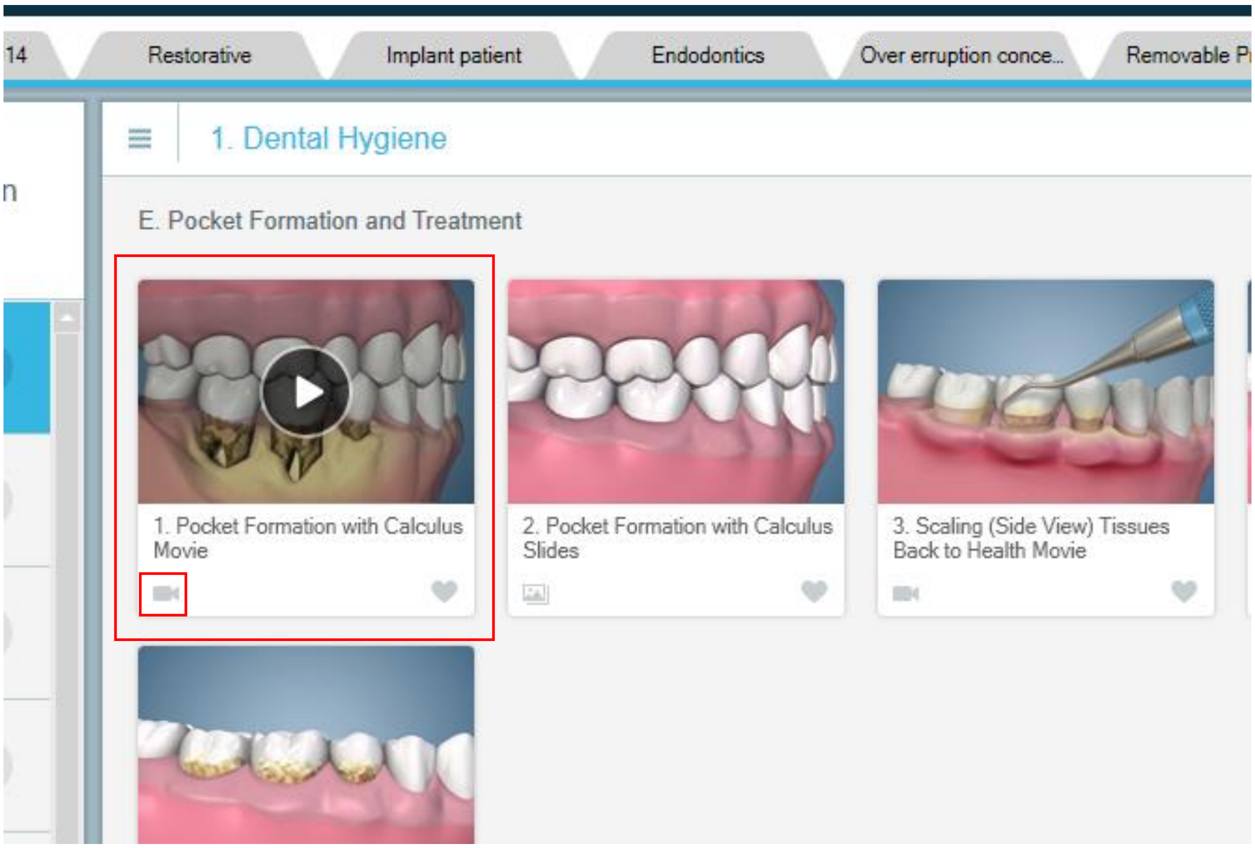
A final way to quickly navigate through videos without scrolling is by using the navigation tool contained in every presentation category.



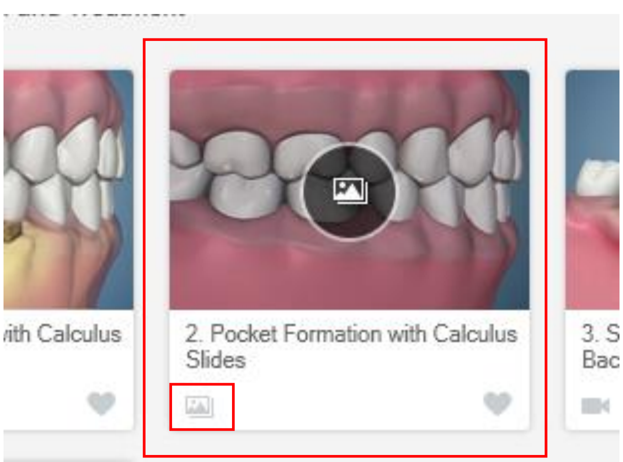
Click this button to navigate through presentations without using the preview window on the right.

Chairside

Hovering your mouse over a presentation will indicate which presentation type it is. The icon located at the bottom left of the thumbnail will also indicate what type of presentation it is. In this case, the selected presentation is a video.



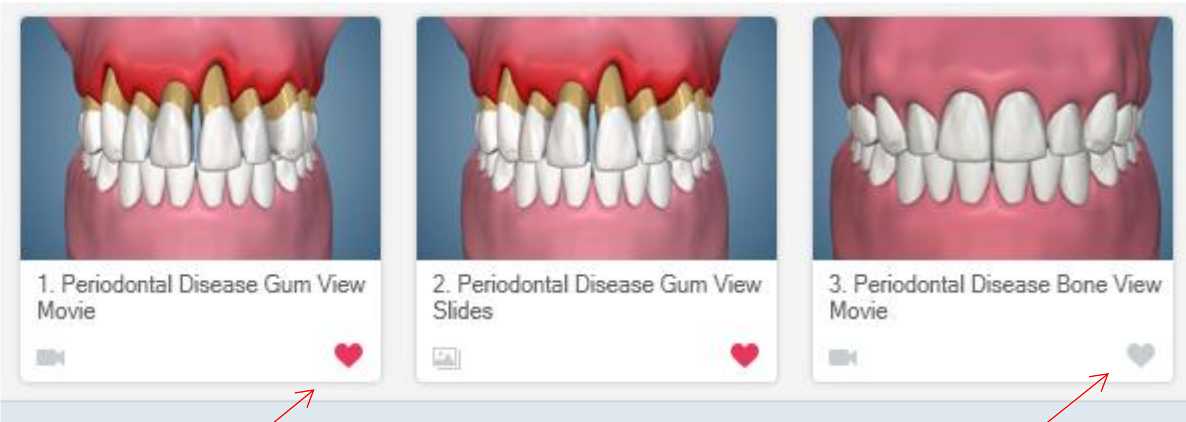
Presentations that are slides will have the following symbol appear.



Chairside

Favourites

Login with a user. You will notice that each presentation preview has a **Heart Symbol** in the bottom right corner of the thumbnail. This will allow you to add or remove that presentation from the user's **Favourites**.

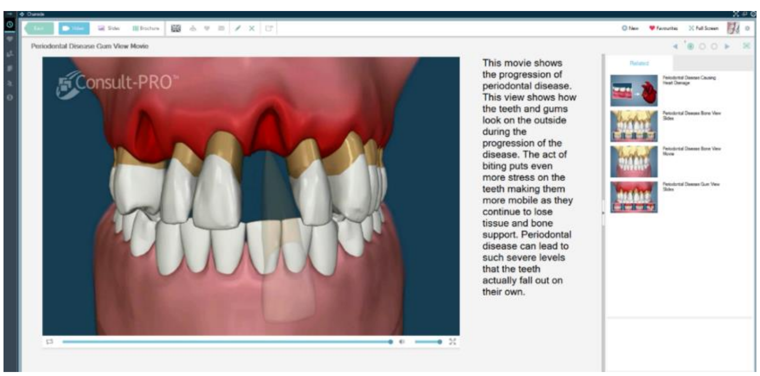


This presentation is in this user's **Favourites**. Click the heart button to remove this presentation from your **Favourites**. The heart button will turn grey signifying this presentation has been removed from your favourites.

This Presentation is not in the user's **Favourites**. Click the heart button to add this presentation to your **Favourites**. The heart button will turn red signifying this presentation has been added to your favourites.

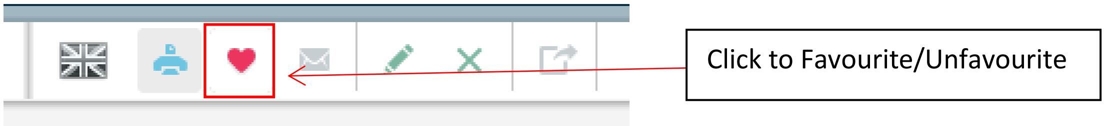
Additional way of adding Favourites

Login with a user. View the presentation you wish to add as a favourite.

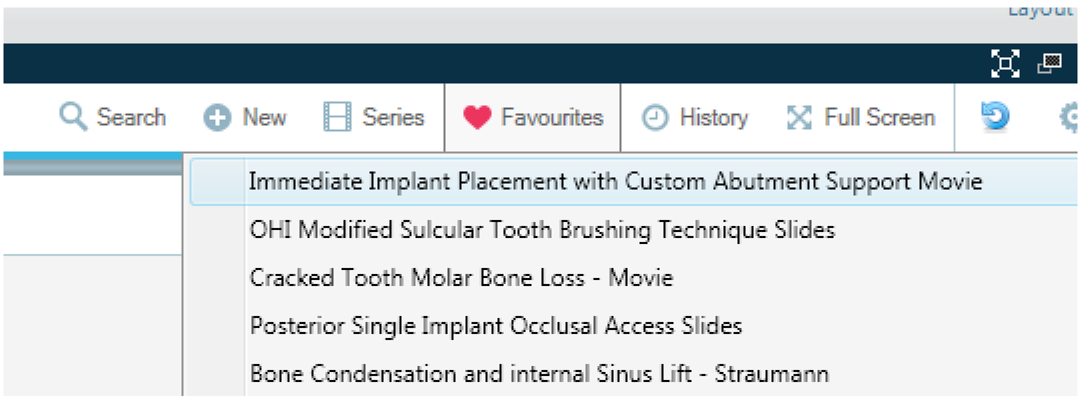


Chairside

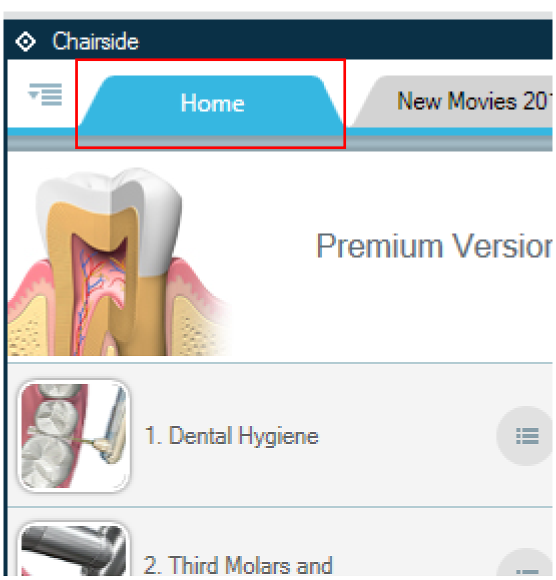
Click the heart button to mark as a favourite.



Favourites can be viewed in two ways. Click the **Favourites** button near the upper right of the screen. You will see a list of your user's favourite presentations.



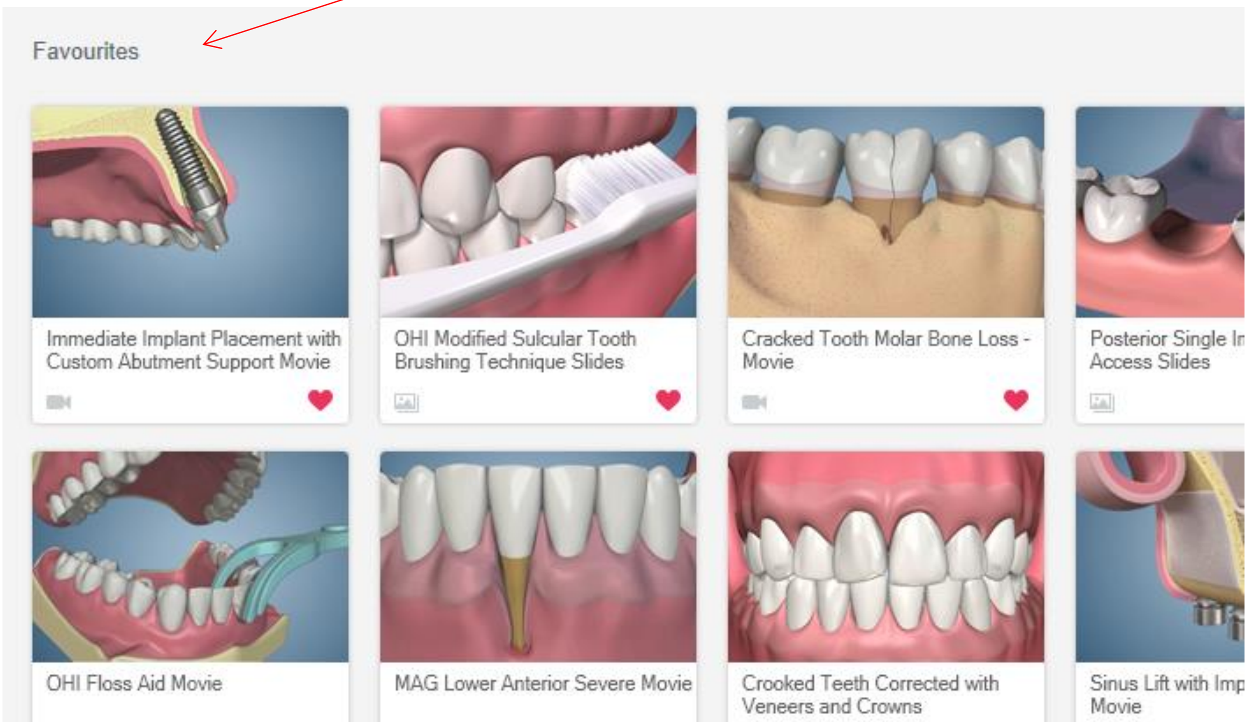
You can also view your user's favourite movies by clicking the **Home Tab,** located above the presentation categories.



Your user's favourites appear in the presentation preview window.

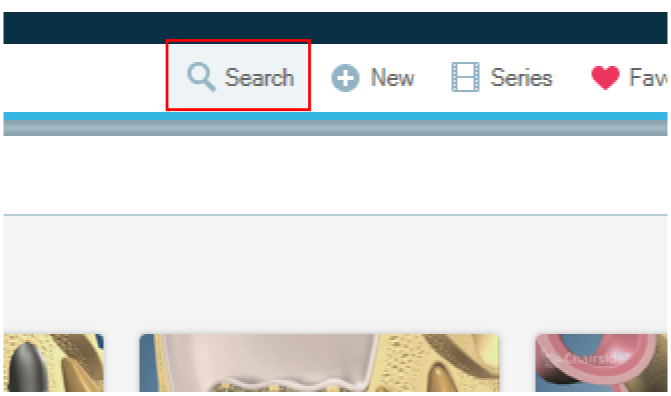
Chairside

These movies are all in the current user's favourites



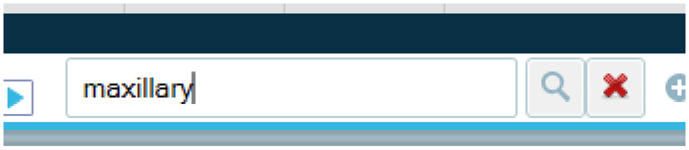
Searching Presentations

You can use the search tool to easily find presentations in the software, add them to your **Favourites**, or learn where different presentations are stored. Click the **Search Button.**

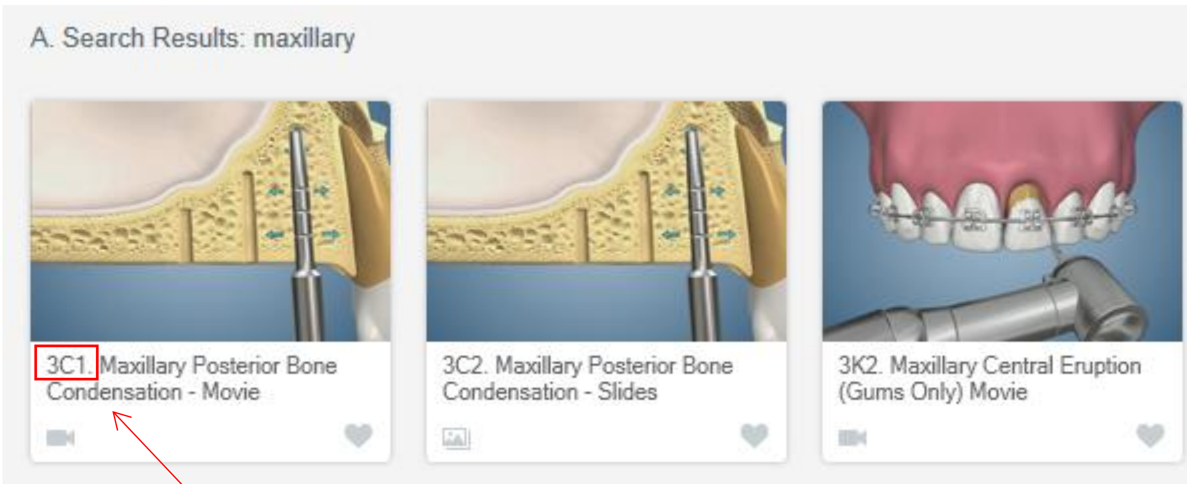


Enter the word maxillary into the search box that appears.

Chairside



You will see every presentation in the software with the word “maxillary” in the title. You’ll also notice a code before every presentation title.



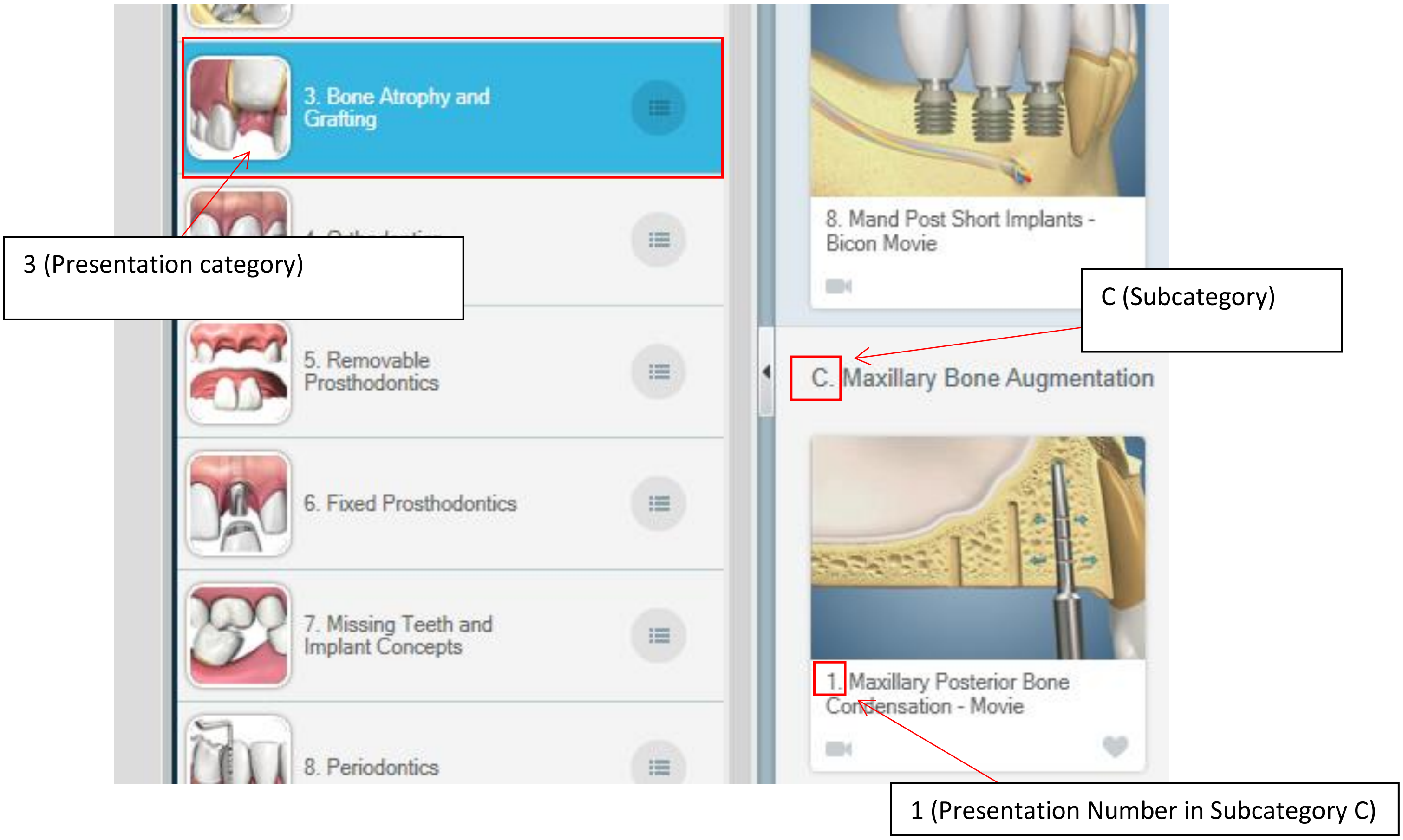
Presentation code

We can use this code to find where this presentation is located. The first number, 3, denotes the presentation category. In this case, the presentation category is “Bone Atrophy and Grafting “.

The second letter, C, denotes the subcategory. In this case, the presentation category is “Maxillary Bone Augmentation”.

The final number, 1, denotes the presentation number in the subcategory. This is demonstrated in the image below.

Chairside

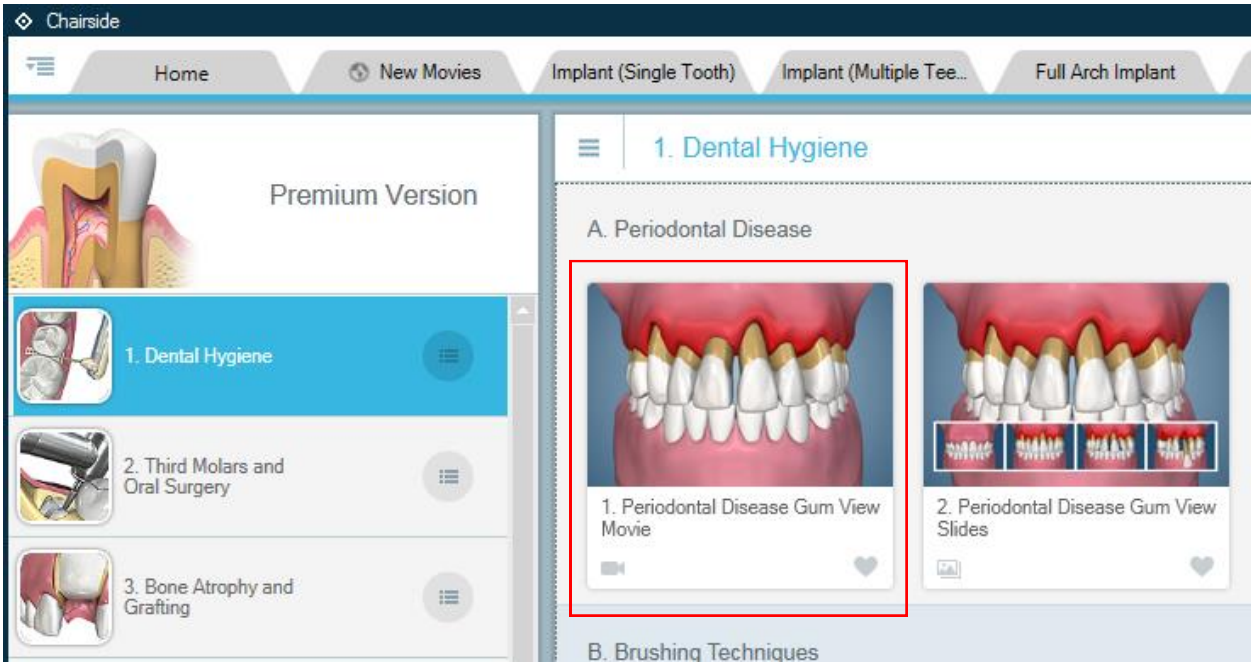


You can also **Favourite** any movie you find with the **Search Tool** using the same method mentioned earlier.

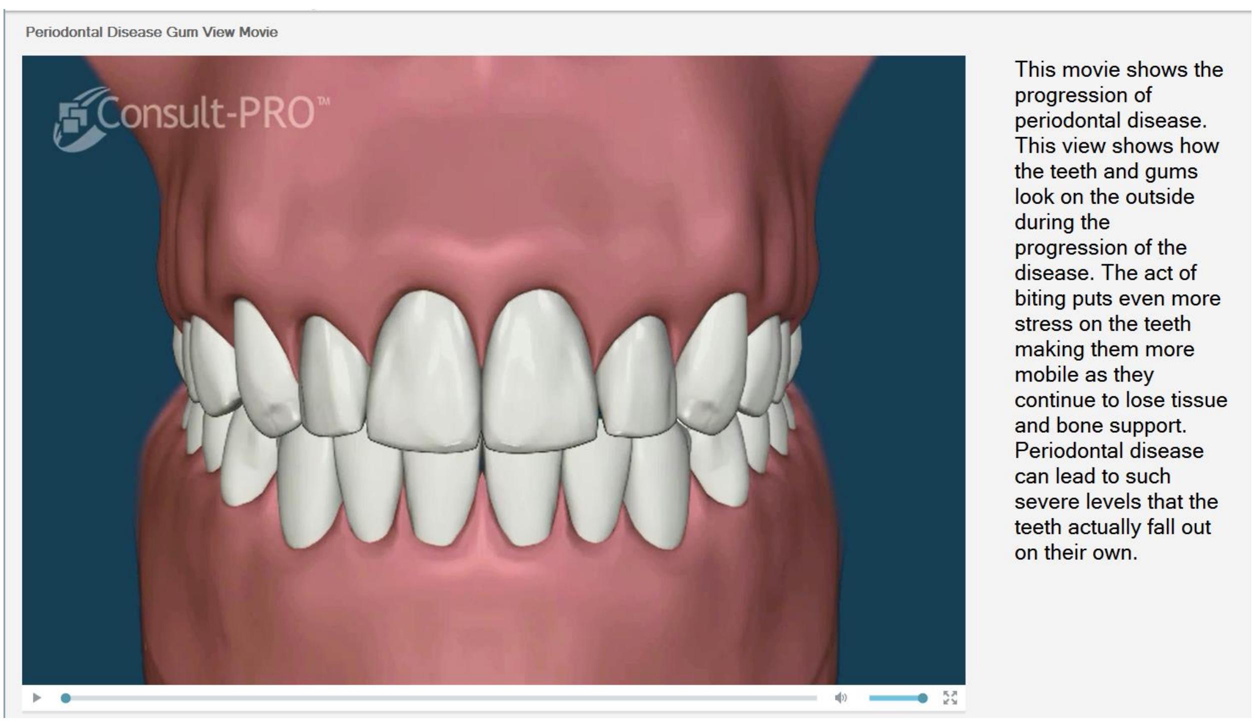
Chairside

Viewing Videos

Click the **Dental Hygiene** category and click the first movie that appears (Periodontal Disease Gum View Movie).

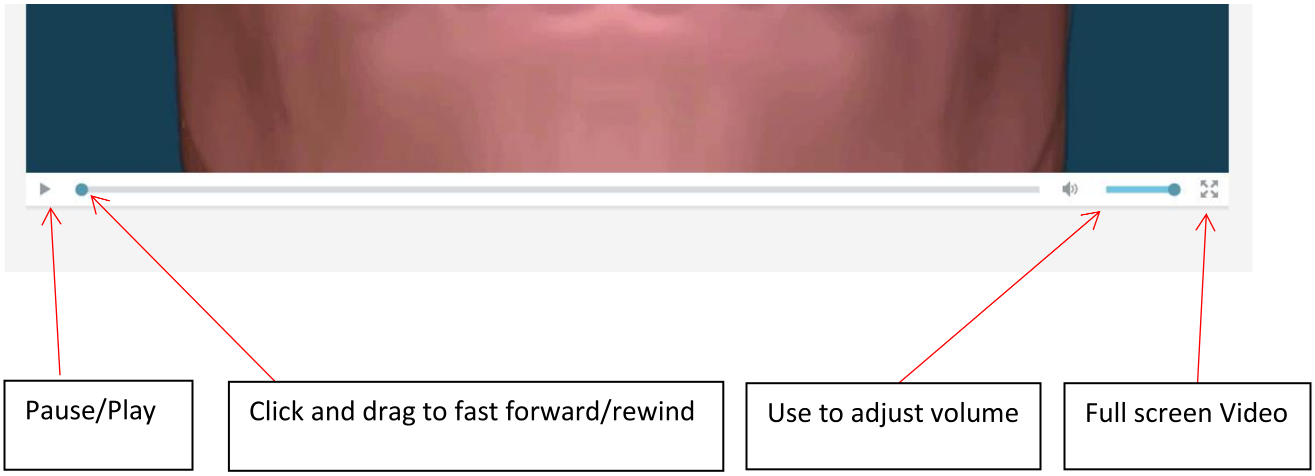


The presentation will now play.



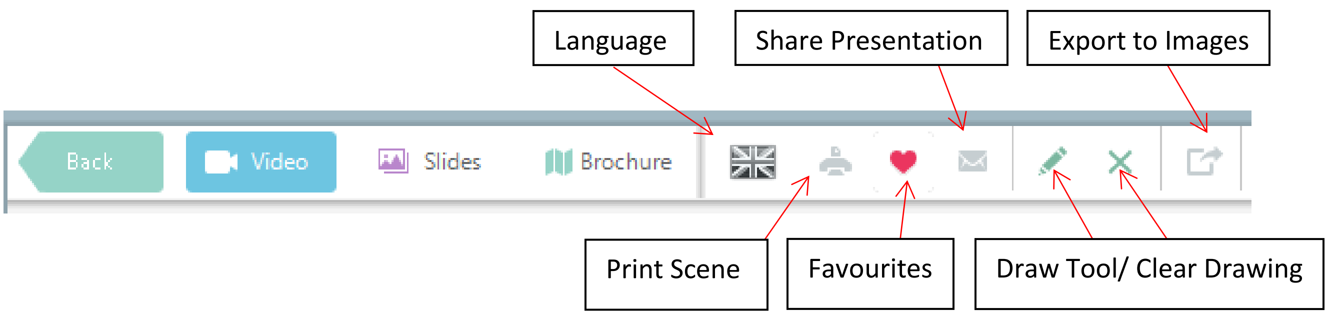
Chairside

Below the video, you will see the video playback tools.

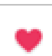


Presentation Tools

The following menu located above the presentation are the **Presentation Tools.**



Presentation Tools Overview

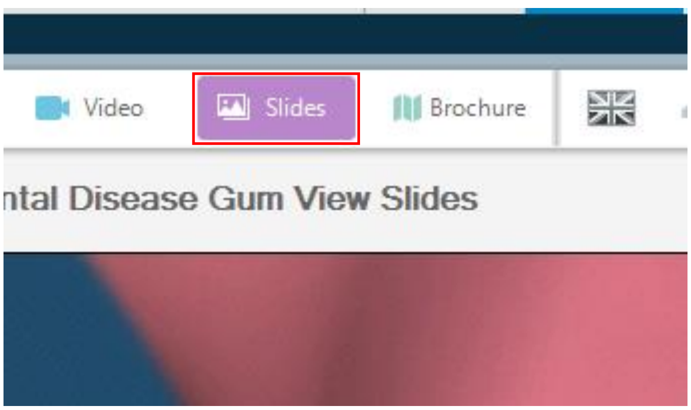
Back	Returns you to the previous screen.
Video	Allows you to view the presentation as a video.
Slides	Allows you to view the presentation as a slideshow.
Brochure	Allows you to view the presentation as a printer friendly brochure.
	Allows you to change the language for the presentation.
	Allows you to print the presentation.
	Allows you to add the presentation to your user's favourites.

Chairside

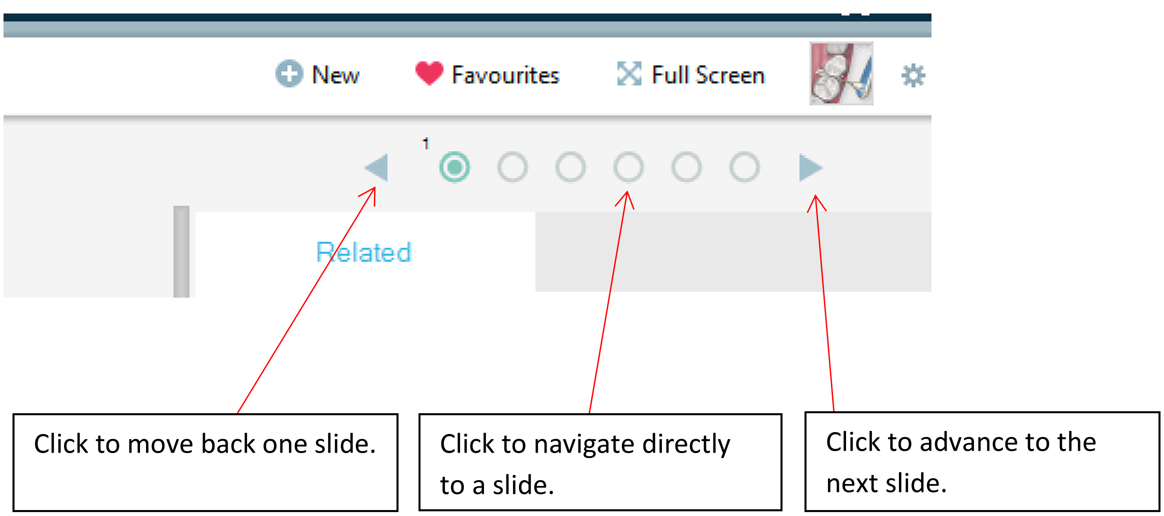
	Allows you to email the presentation to the patient as well as share on Connect with the patient.
	This tool draws on the presentation.
	This tool exits the draw tool.
	Export what is on the screen to the Images Module.

****If Video, Slides or Brochures are highlighted in the presentation tools, this indicates what type of presentation you are viewing.**

Navigating Through Slides

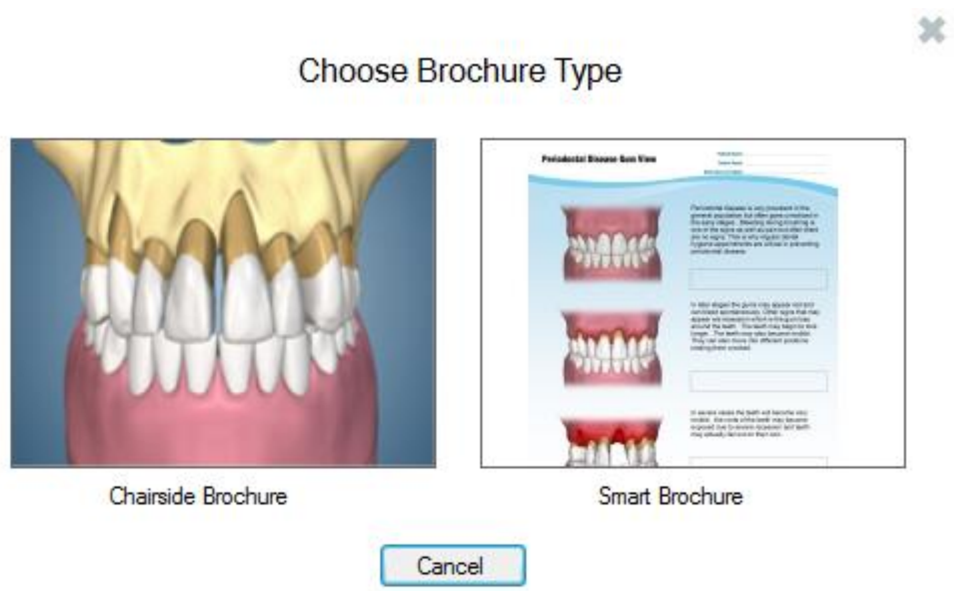


You can navigate to different slides by clicking on the bubbles in the upper right or use the next and back arrows.



Chairside

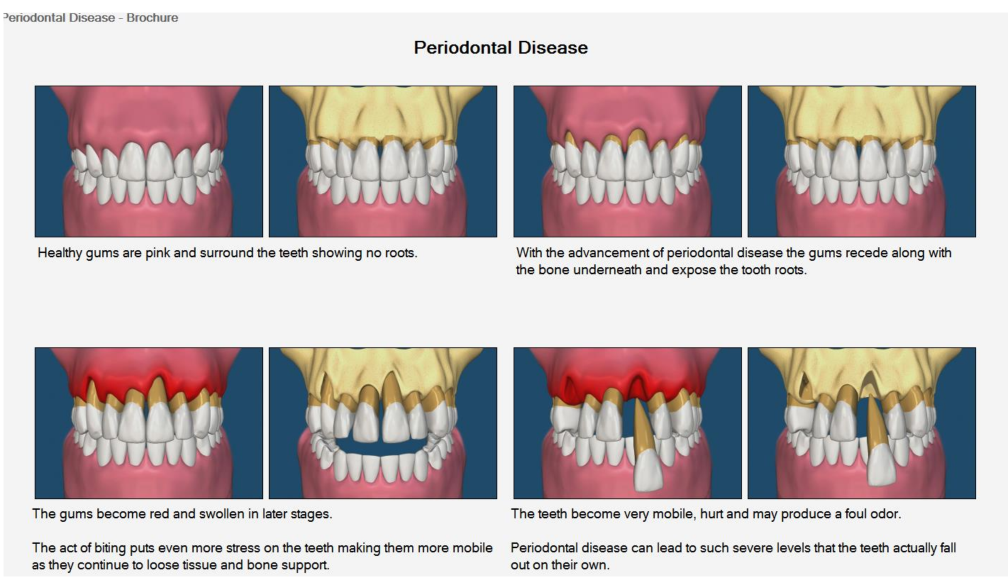
Click the **Brochure** Button. If a presentation has multiple brochures available, you will see the following:



Chairside Brochure will open a printer optimized version of the presentation.

Smart Brochure will open the brochure in the **Brochures** module.

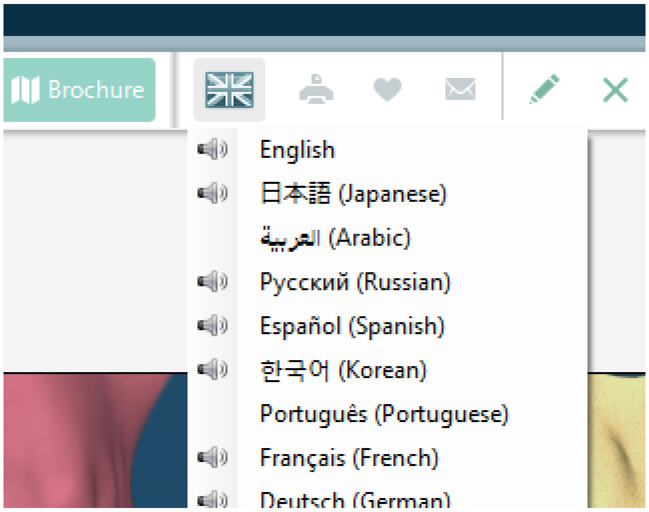
Select **Chairside Brochure** to view the brochure in Chairside.



Chairside

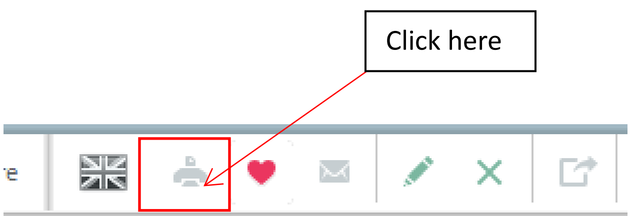
Selecting Different Languages

Click the **Languages** button to change the language of the presentation. You will notice that certain languages have a loudspeaker icon next to them. These presentations have audio and text translations. Those without the loudspeaker icon will only have text translations.



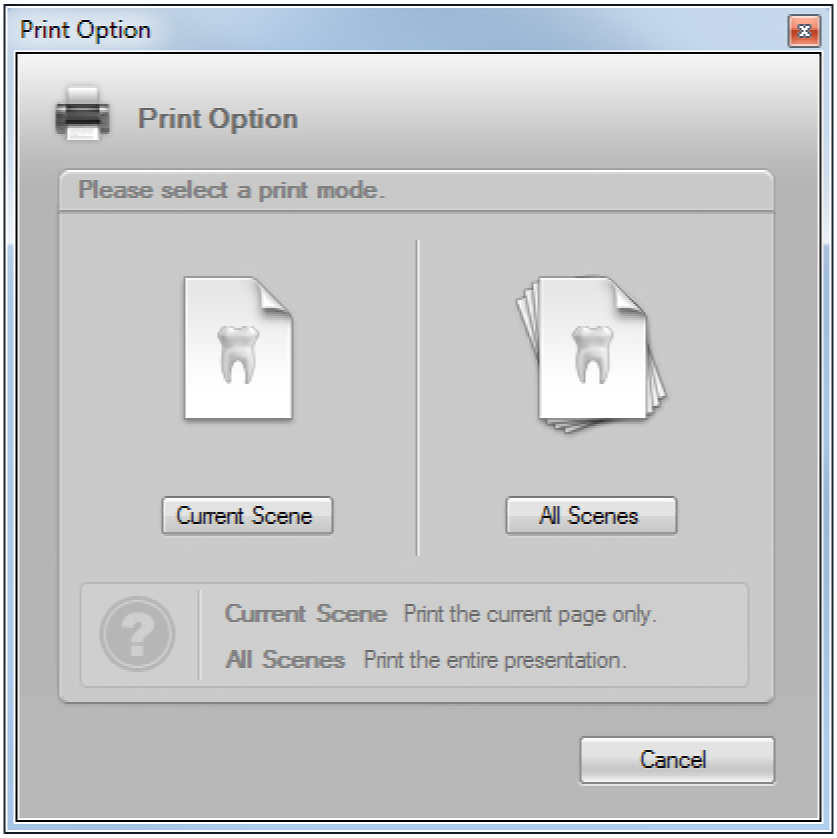
Printing Presentations

While viewing a presentation, click the **Print** button.



Chairside

The following screen will appear:

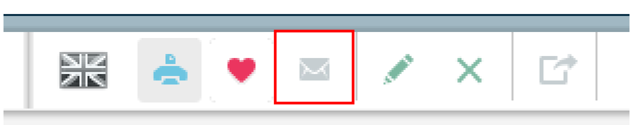


Current Scene: Prints the current scene displayed.

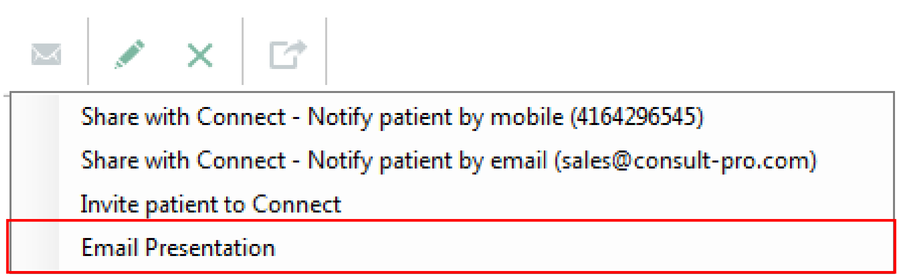
All Scenes: Prints all the scenes in a presentation, such as printing all the slides.

Emailing Presentations

Login with a user and patient. View the presentation you wan to email. Click the **Email** button.

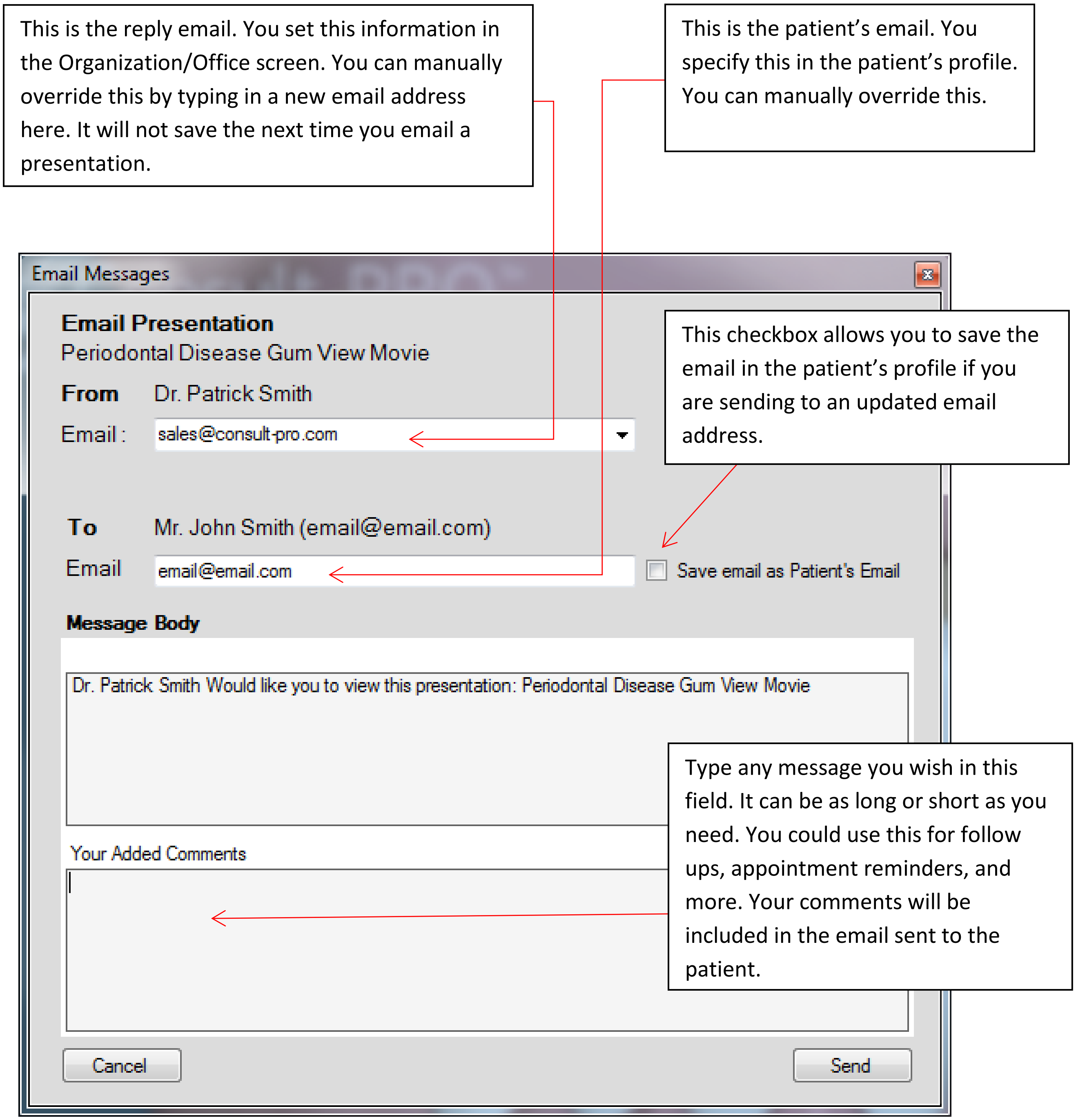


Select **Email Presentation**.



Chairside

Email Messages window will popup.

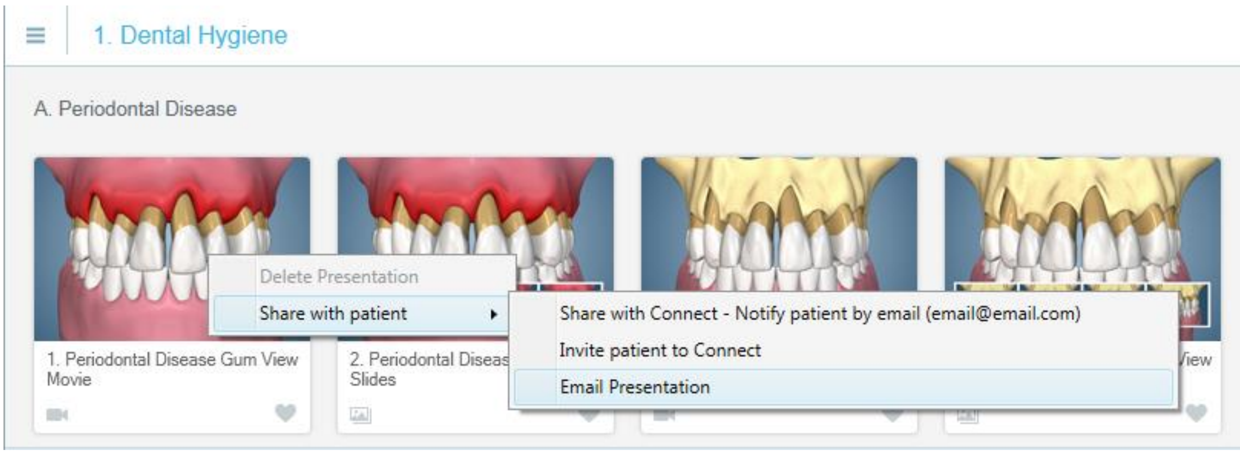


Once all information is correct and your desired comments are inputted, click **Send** to email the presentation. You will receive a message confirming that the email has been sent to the patient. Click **OK**.

Chairside

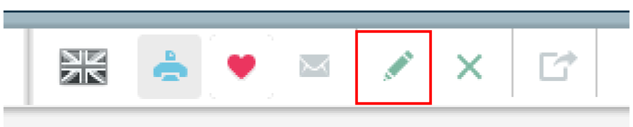
Alternative Method of Emailing Presentations

Right click the presentation you want to email. Click **Share with Patient** and select **Email Presentation**.

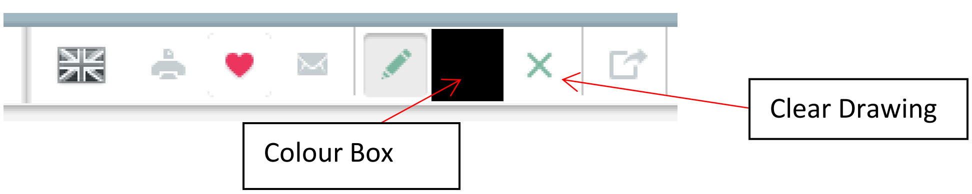


Draw Tool

Click the **Draw Tool** in the presentation.



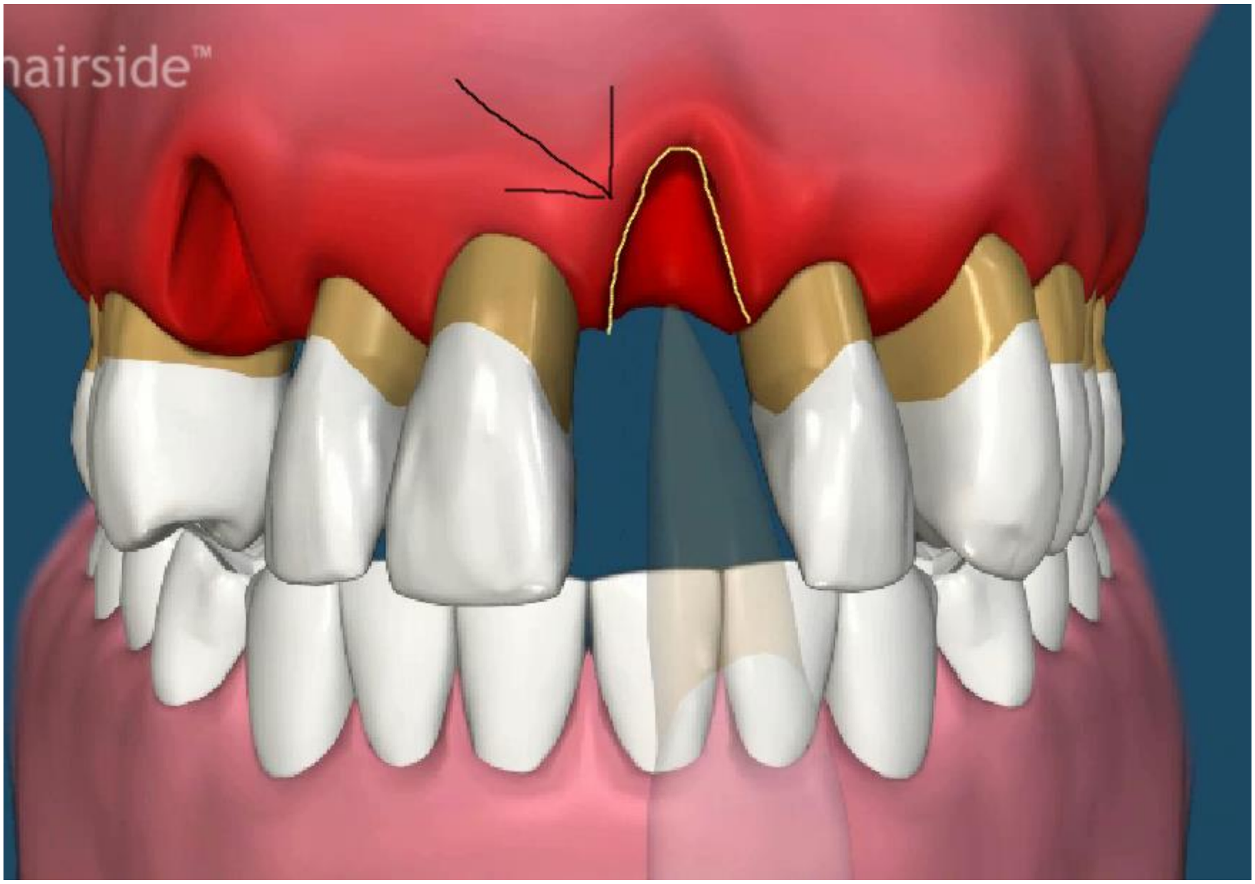
The draw tool will now expand.



Use the **Colour Box** to select the colour of the **Draw Tool**. Click the **Clear Drawing** tool to clear the drawing on the presentation.

Use the mouse to draw on any **Video, Slide,** or **Brochure**.

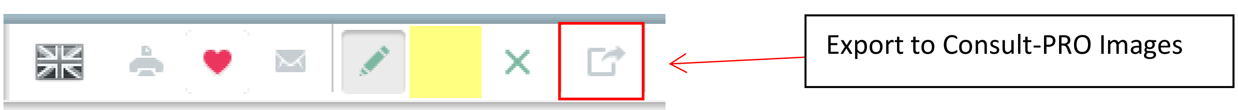
Chairside



You can draw in multiple colours simultaneously, and drawings will show up in printouts.

Exporting a Drawing to Consult-PRO Images

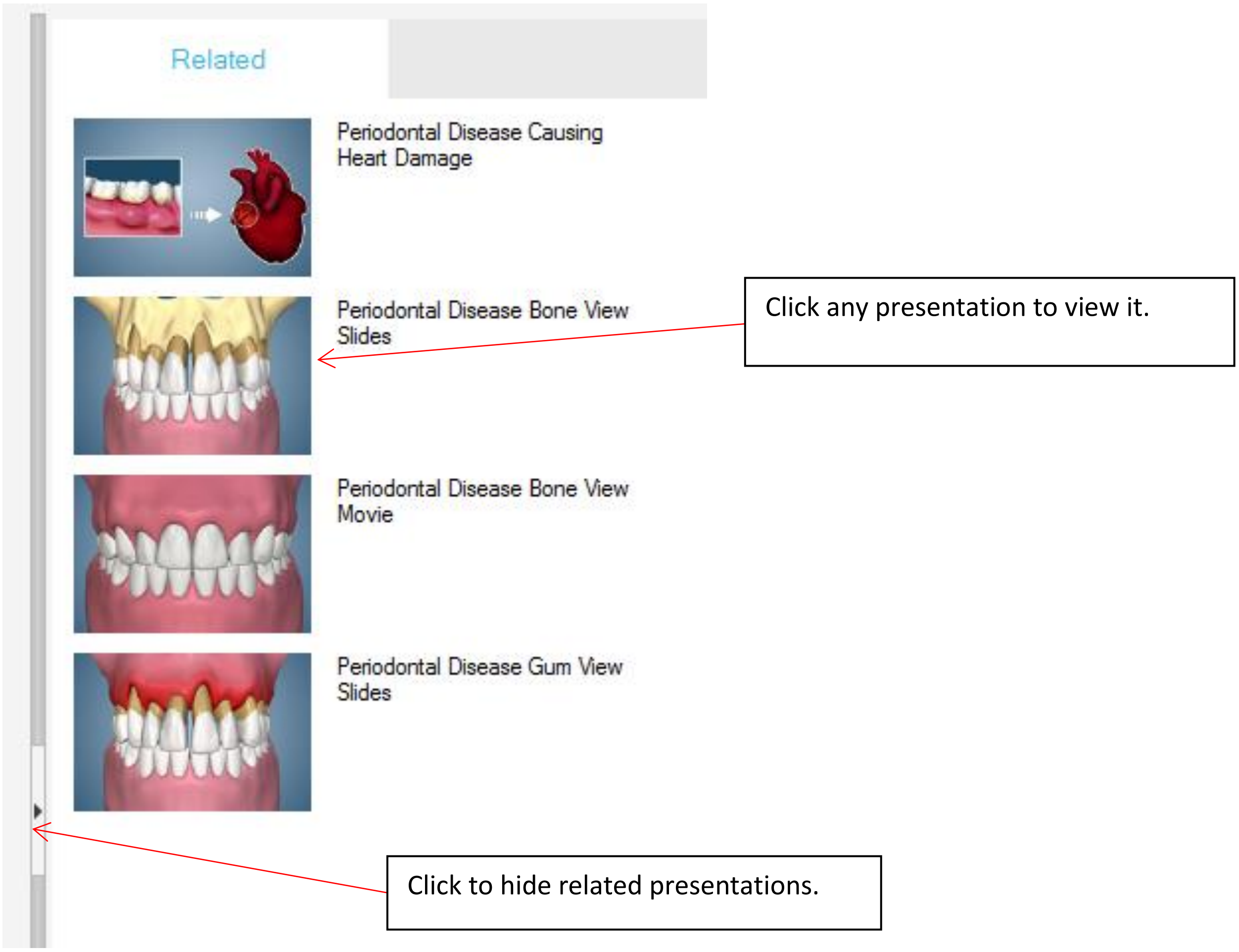
Login with a user and patient. Click the **Export to Consult-PRO Images.** This will send your drawing to Consult-PRO Images for the patient.



Related Presentations, and Other Functions

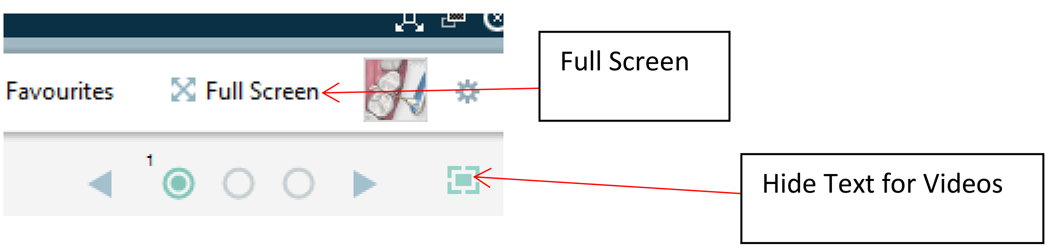
When viewing a video, you will see a list of related presentations located in the right pane. Click the arrow to hide this screen or click on any of the presentations to view them.

Chairside

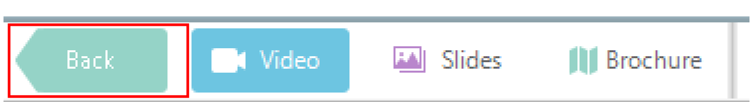


Hide Text for Videos: Removes text from videos.

Full Screen: View Chairside presentations in full screen mode.



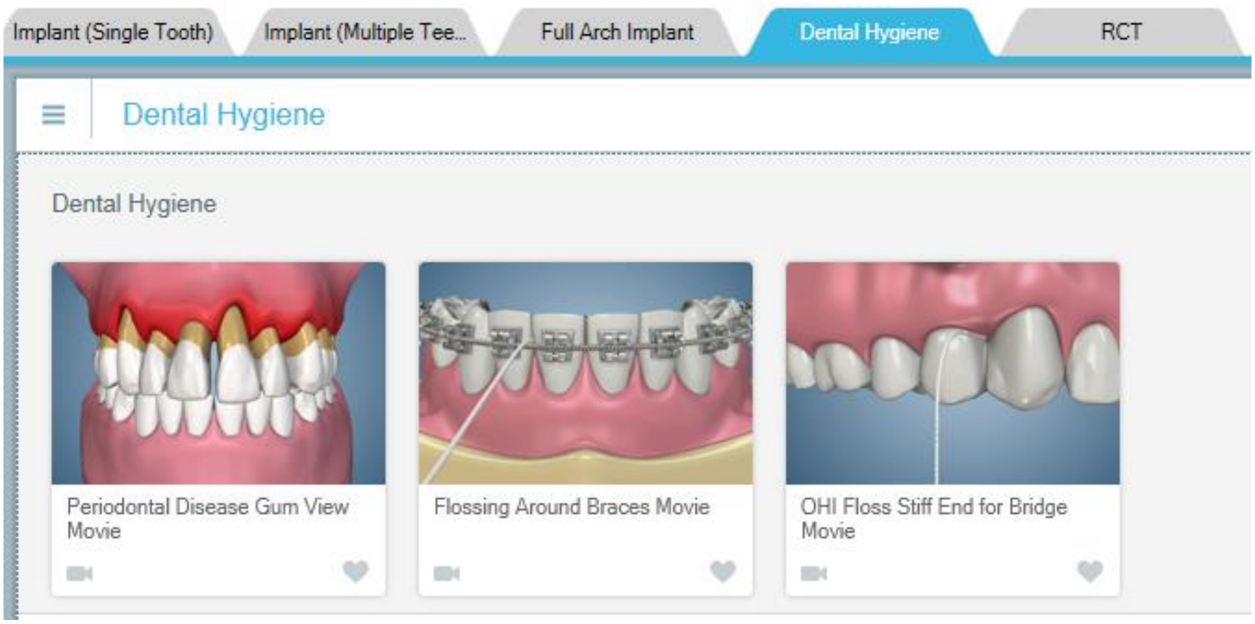
Back Button: Return to the Chairside menu.



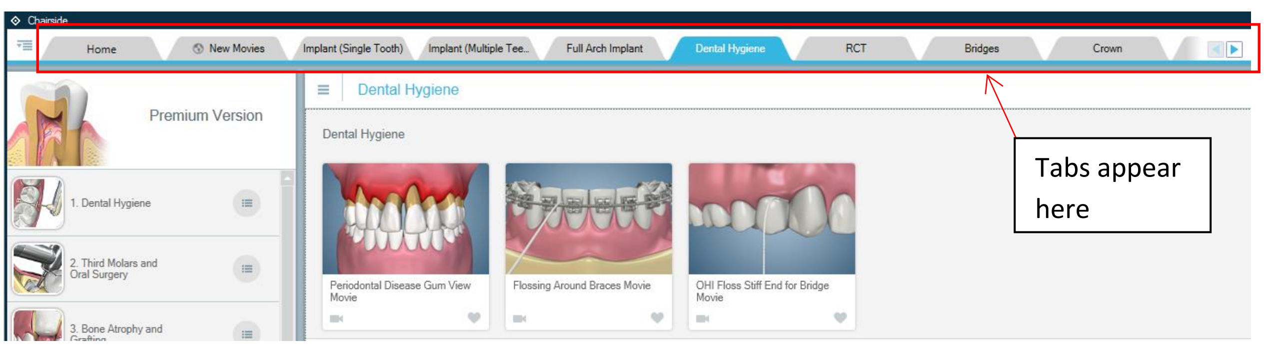
Chairside

Creating and Editing Tabs

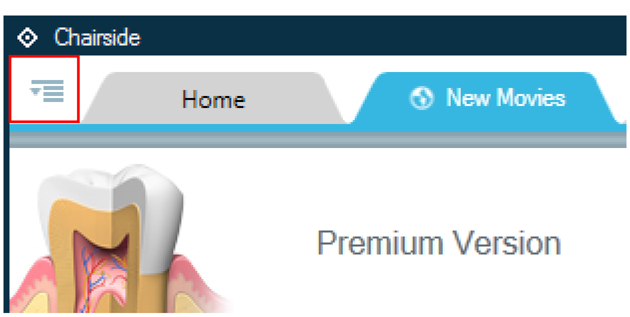
Tabs allow you to group movies you like together that you can share with the whole office. Here's an example of a Tab created with some Dental Hygiene related presentations.



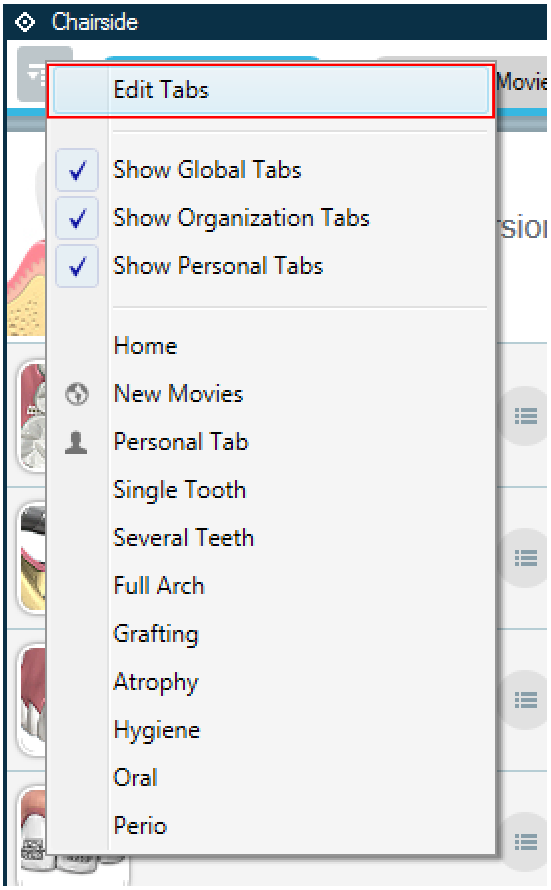
Selected tabs are highlighted in blue. You can name a tab anything you like and put any presentations in them. All tabs appear above the presentation preview window.



To create tabs, please login with a user. Click the **Tab Editor** button and select **Edit Tabs**.



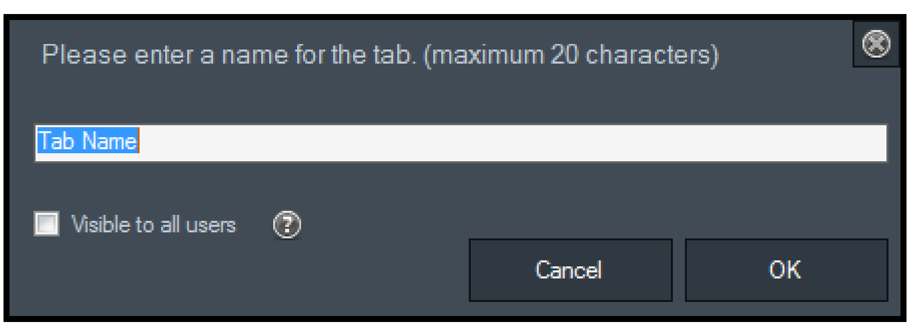
Chairside



Click **New Tab.**

Enter a name for your tab.

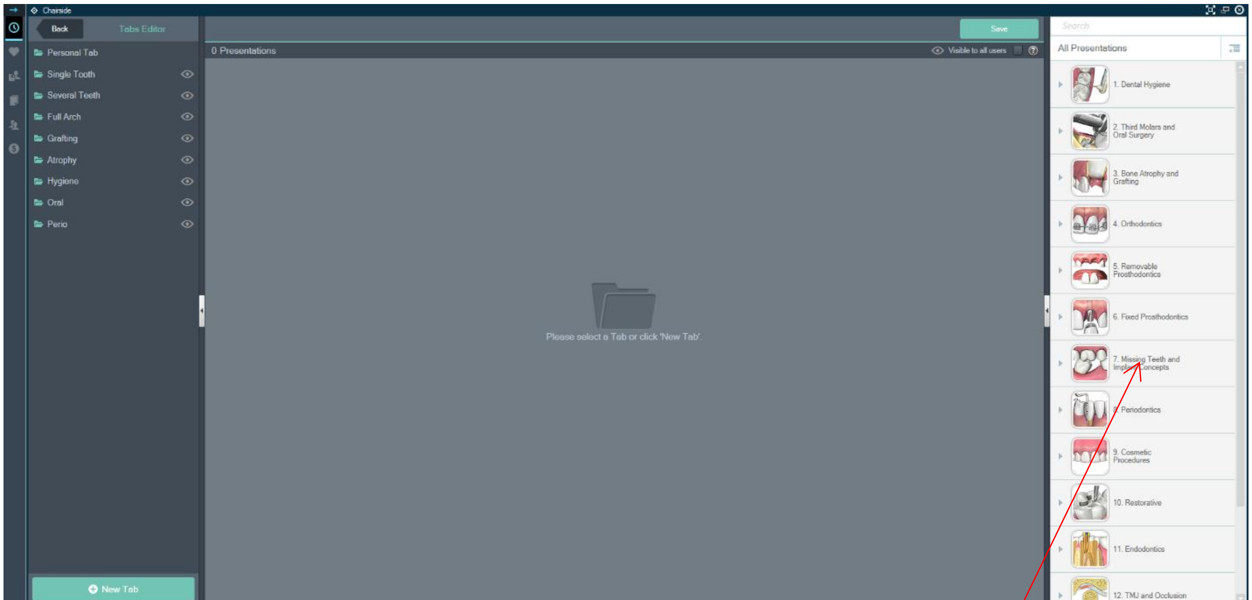
Click **Visible to All Users** button to allow everyone in the office to view the tab you are about to create. This option is only available if you have the privilege “General Admin”. For information on how to enable this privilege, please refer to the Managing users section earlier in this manual.



Chairside

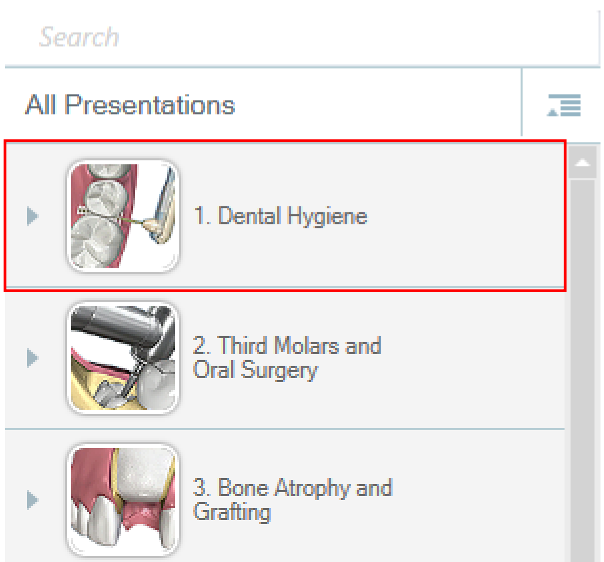
Adding Presentations to Tabs

You are now ready to start importing presentations into your tab.



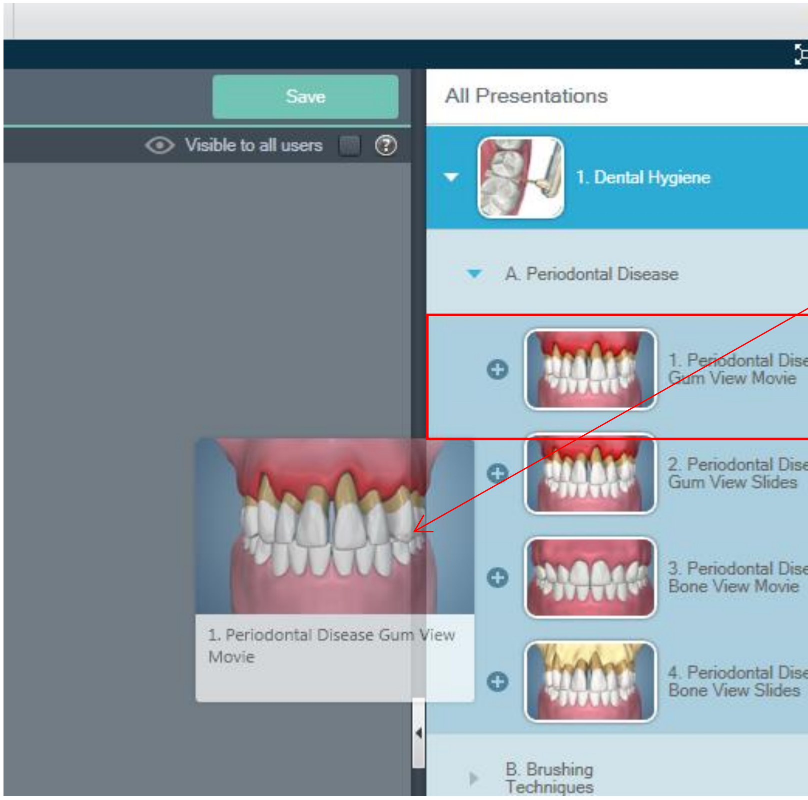
Click to expand categories and subcategories

Click on a presentation category in the tab editor.



Chairside

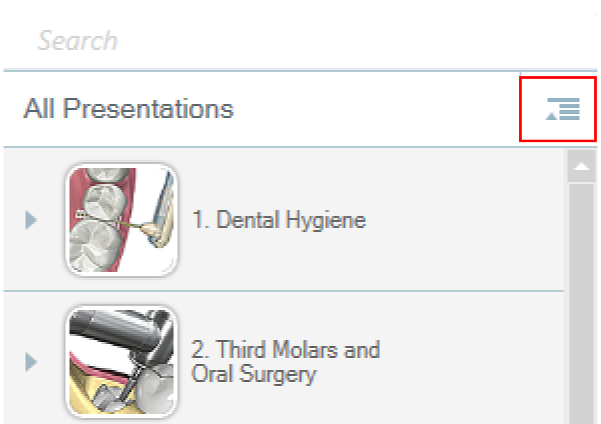
Expand the desired subcategory. Double click the presentation or drag and drop the presentations into the middle pane.



Click and drag the presentation into the middle pane.

The presentation should now appear in the middle pane. You can rearrange presentations in the tab by clicking and holding while dragging the presentation into the desired spot.

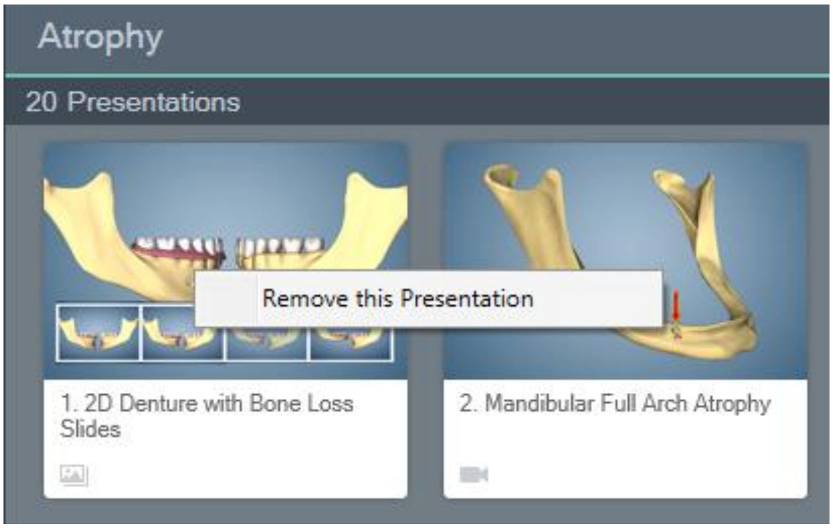
Clicking the **Collapse all** button collapses all categories that have been expanded



Chairside

Removing Presentations from Tabs

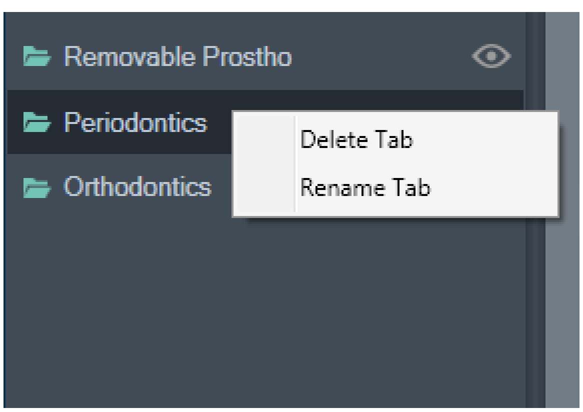
Right click any presentation you have already added into the presentation field and select **Remove this Presentation**.



You can save any time by clicking the **Save** button. You are also given another opportunity to choose if the tab is visible to all users. Click the **Back** button after saving to return to the Chairside menu.

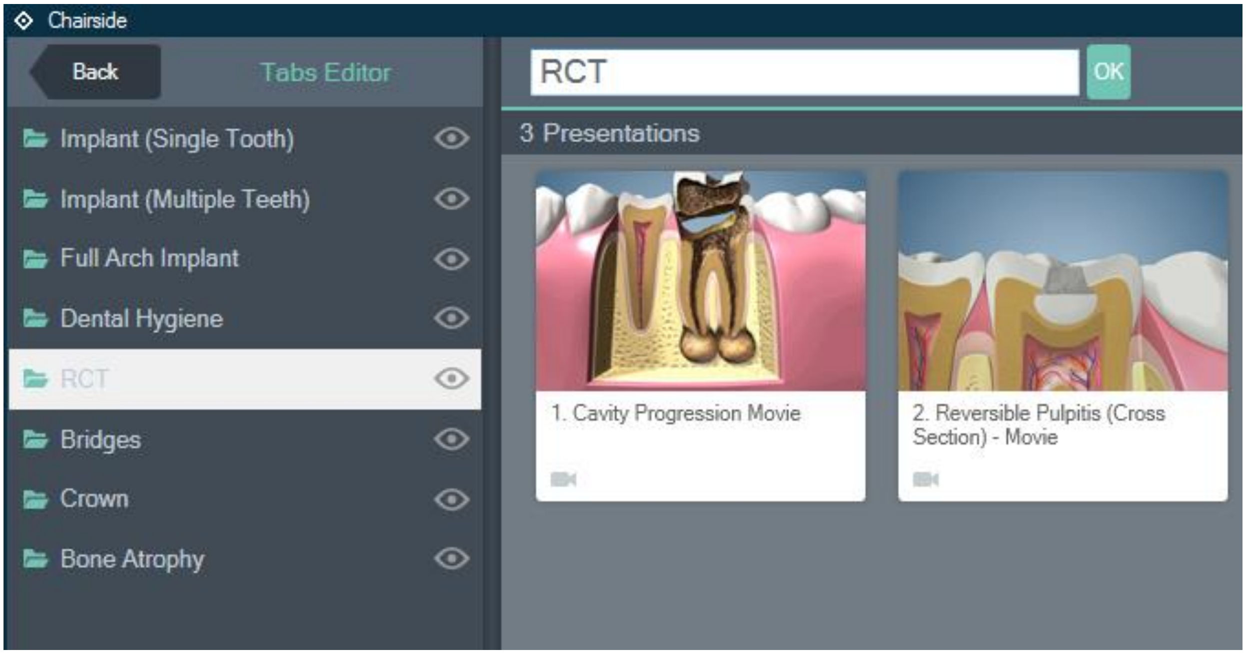
Deleting or Renaming Tabs

Right click the name of the tab in the left pane to rename or delete the tab.



Chairside

Selecting **Rename Tab** will allow you to edit the tab's name. Click **OK** after you have entered a new name. Click **Save** when complete.



Series

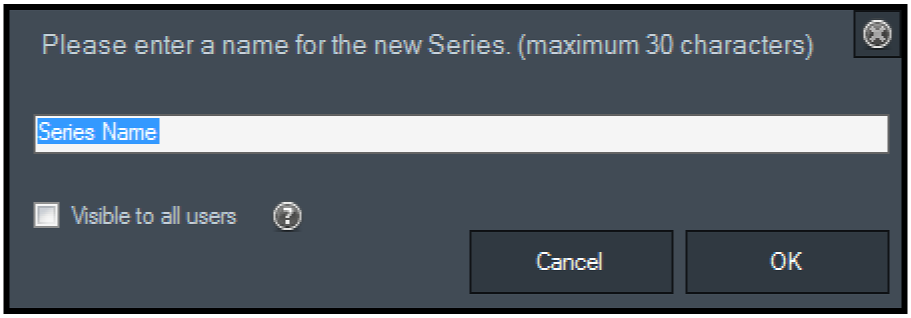
Series allows you to group multiple presentations in a playlist. This can be used in the waiting room, or as part of a case presentation.

Click the **Series** button and select **New.** Selecting **Edit** will edit existing series.

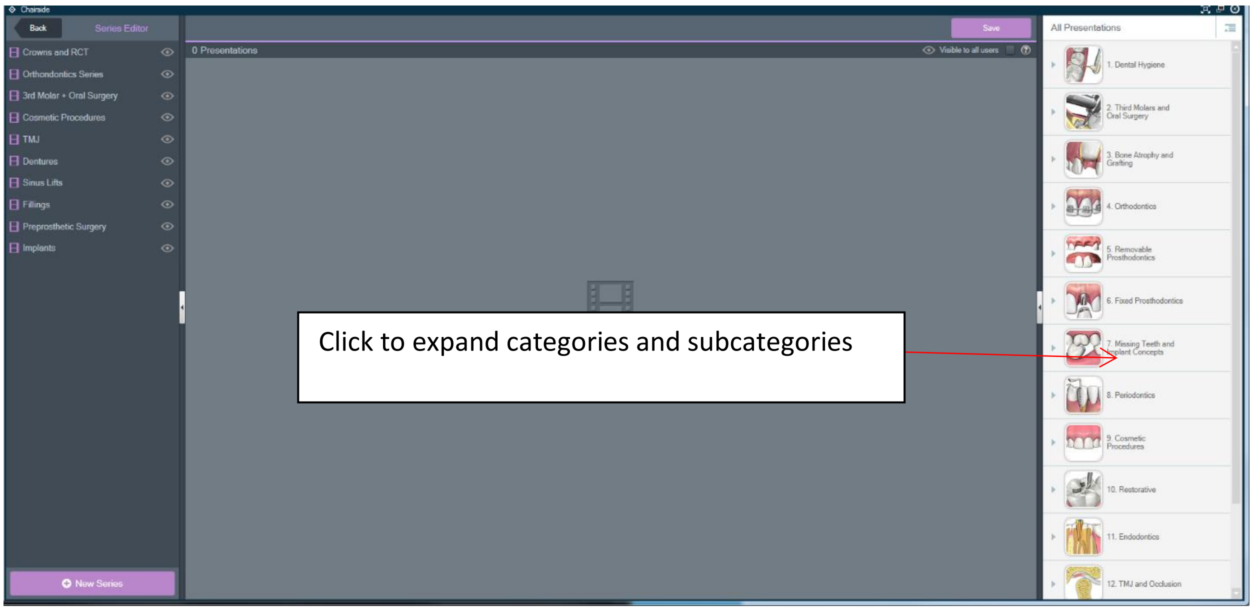
You will be taken to the **Series Editor**. It works in the same fashion as the tabs editor.

Enter a name for your series. Select **Visible to all users** if you want everyone in the office to view your series. Click **OK** when finished.

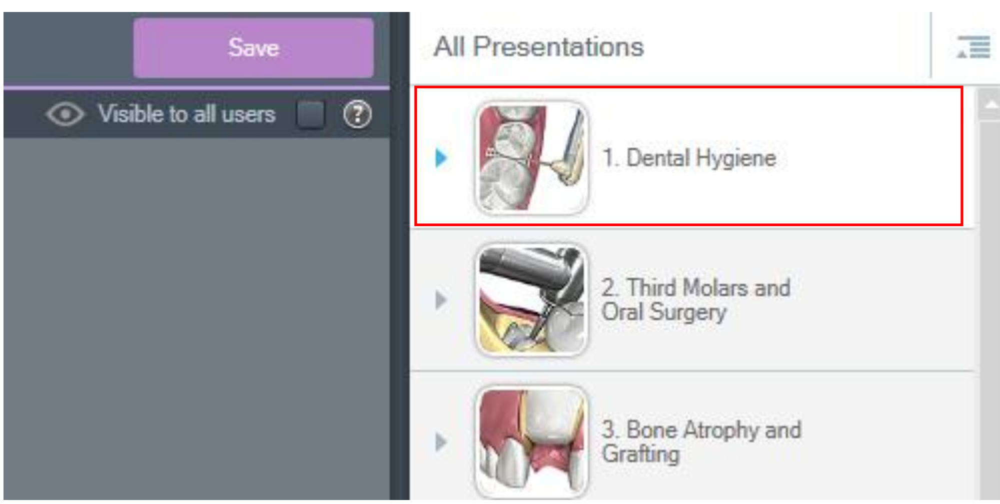
Chairside



You are now ready to start importing presentations into your series.

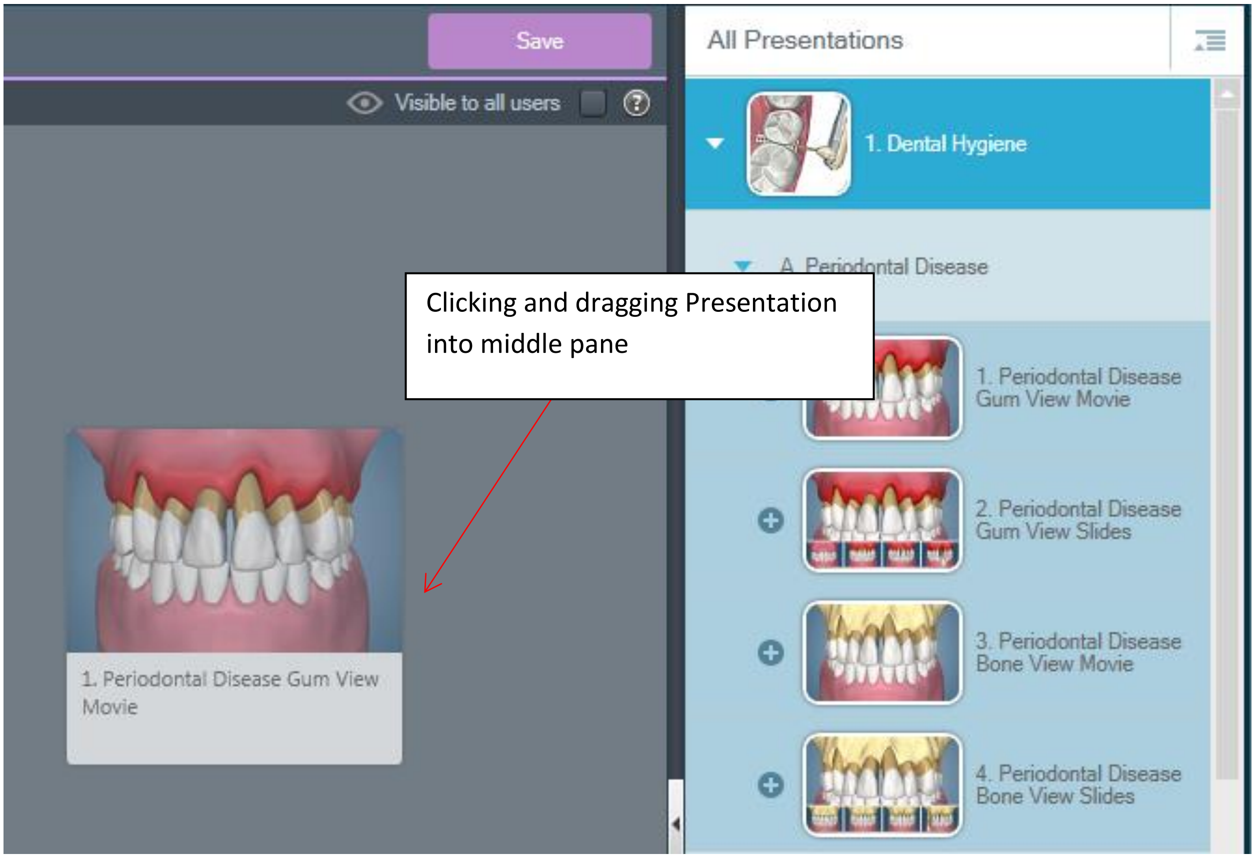


Click on a presentation category in the series editor.



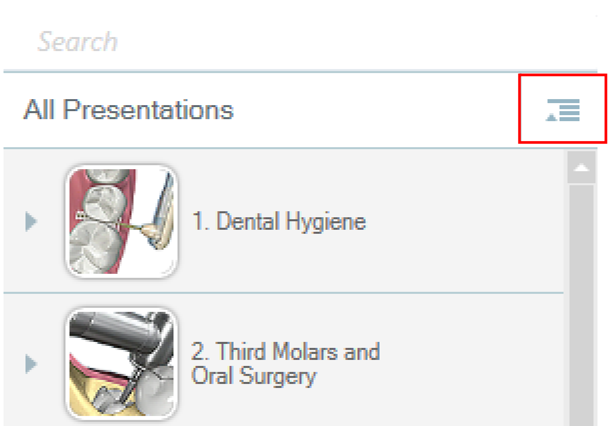
Expand the desired subcategory. Double click the presentation or drag and drop the presentations into the middle pane.

Chairside



The presentation should now appear in the middle pane. You can rearrange presentations in the tab by clicking and holding while dragging the presentation into the desired spot.

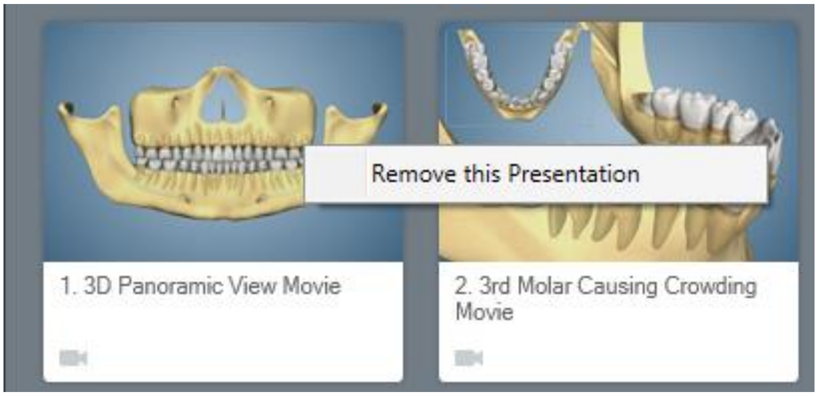
Clicking the **Collapse all** button collapses all categories that have been expanded



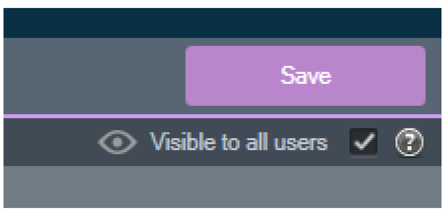
Chairside

Removing Presentations from Series

Right click any presentation you have already added into the presentation field and select **Remove this Presentation**.

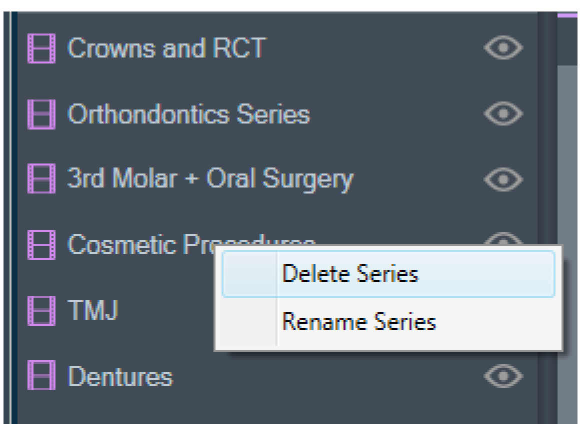


You can save any time by clicking the **Save** button. You are also given another opportunity to choose if the tab is visible to all users. Click the **Back** button after saving to return to the Chairside menu.



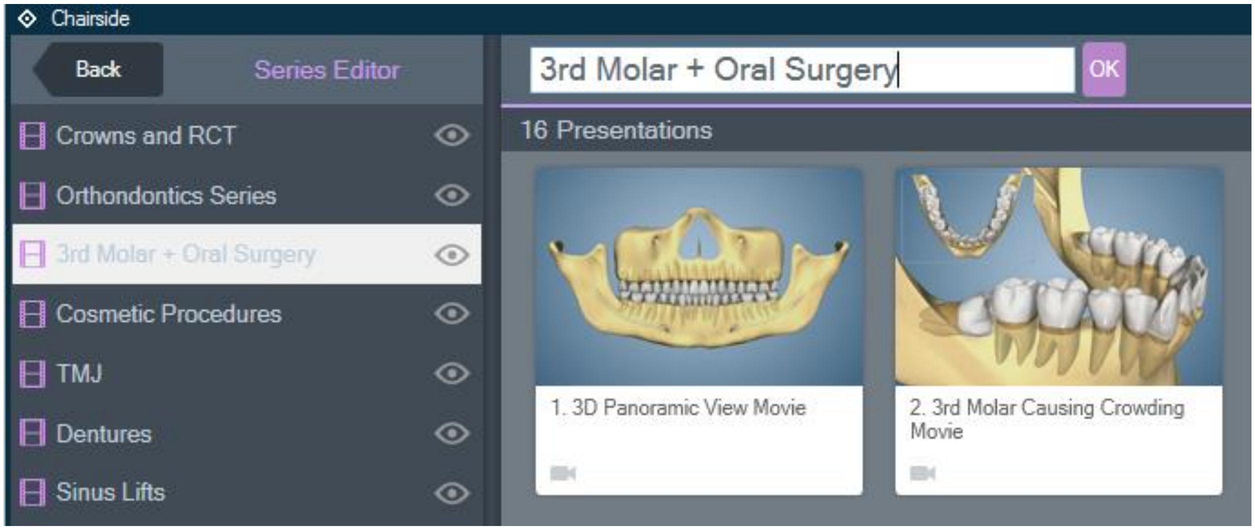
Deleting or Renaming Series

Right click the name of the series in the left pane to rename or delete the series.



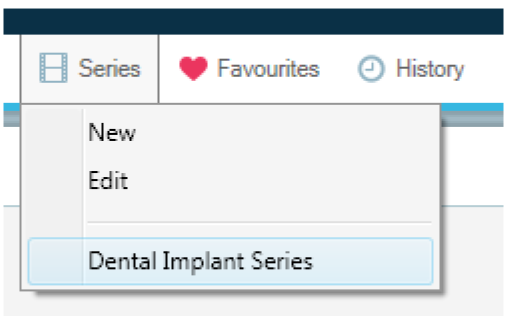
Selecting **Rename Series** will allow you to edit the series' name. Click **OK** after you have entered the new name. Click **Save** when complete.

Chairside



Viewing Series

Click the series button and select one of your series to play.



You will see two options for playback modes, **Manual**, and **Automatic**.

Chairside

This option allows you to manually advance to the next presentation. You can pause, fast forward, or rewind.

This option loops the series to start again after it finishes.

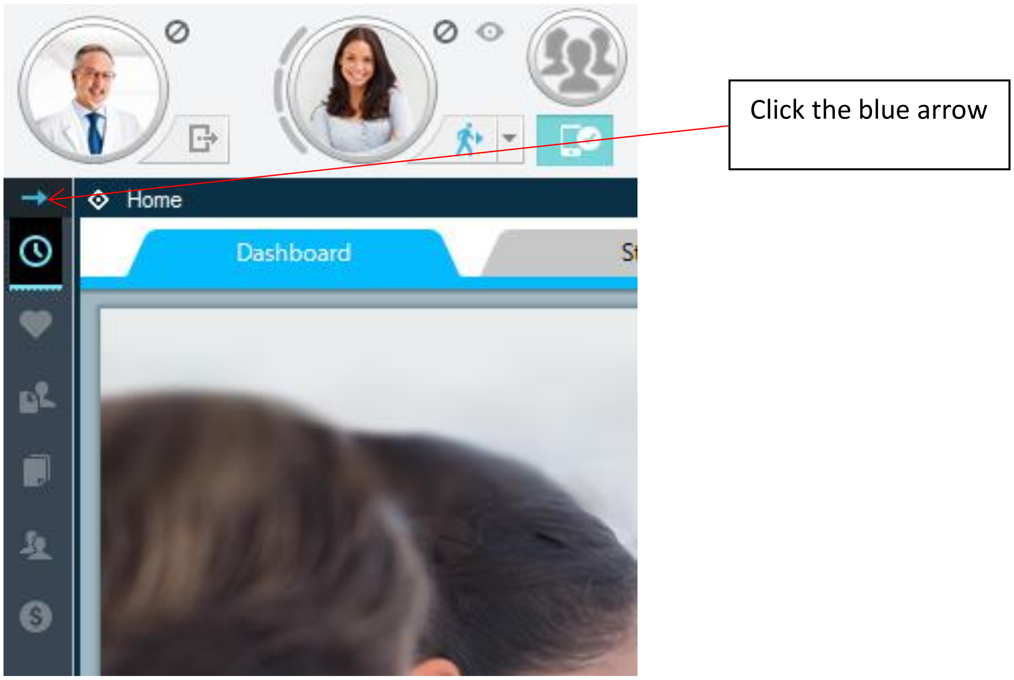
This option advances through the presentations without prompting.

Chairside

Patient History

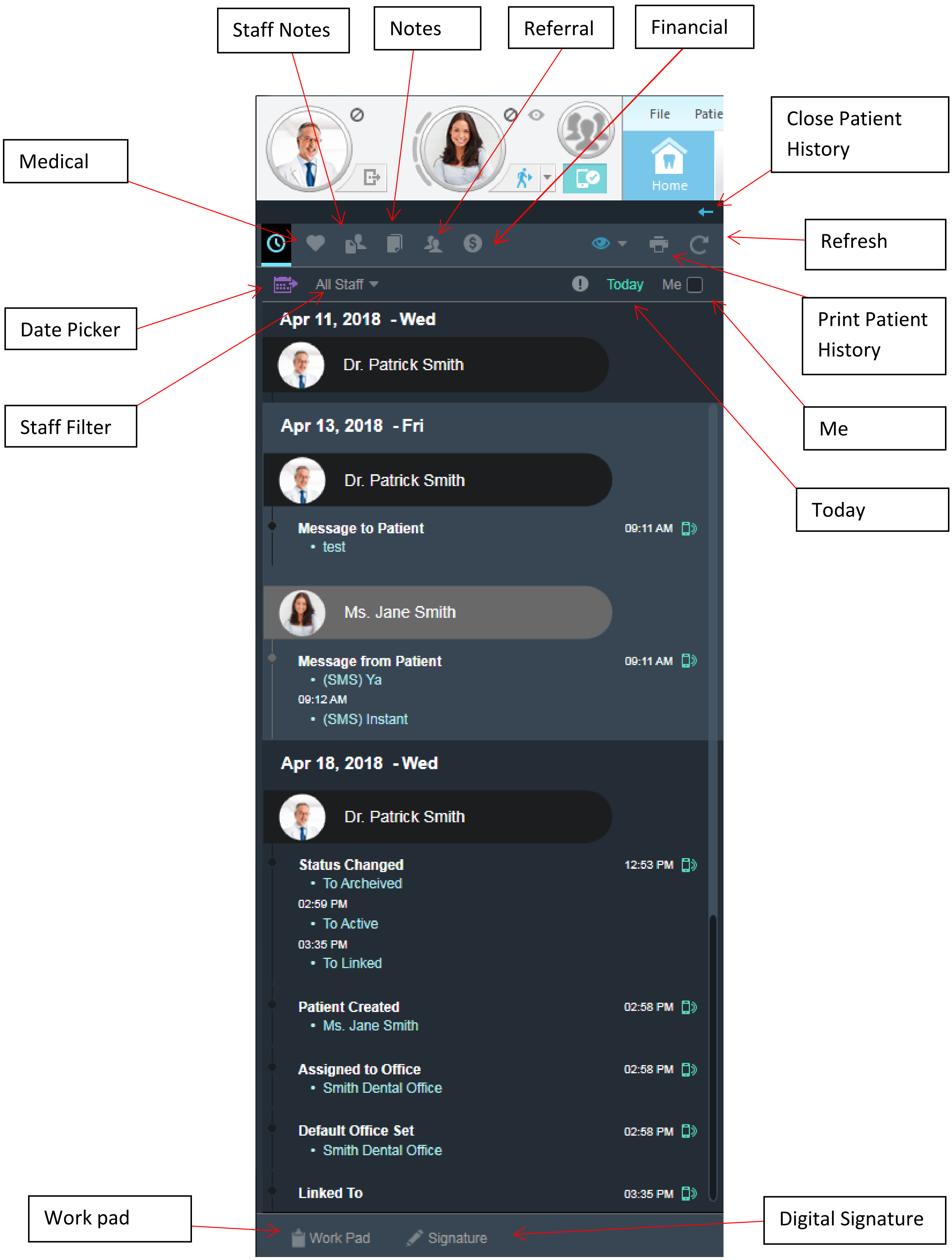
Consult-PRO comes with a built-in history logger for the patient. This function automatically records all activity related to the patient in the software.

Open **Patient History** by clicking the blue arrow right under the **User Login** button.



The **Patient History** will now appear.

Chairside



Staff Notes
Notes
Referral
Financial
Medical
Close Patient History
Refresh
Print Patient History
Date Picker
Staff Filter
Me
Today
Work pad
Digital Signature
File
Patie
Home
All Staff
Today
Me
Apr 11, 2018 - Wed
Dr. Patrick Smith
Apr 13, 2018 - Fri
Dr. Patrick Smith
Message to Patient
test
09:11 AM
Ms. Jane Smith
Message from Patient
(SMS) Ya
09:11 AM
09:12 AM
(SMS) Instant
Apr 18, 2018 - Wed
Dr. Patrick Smith
Status Changed
To Archeived
12:53 PM
02:59 PM
To Active
03:35 PM
To Linked
Patient Created
Ms. Jane Smith
02:58 PM
Assigned to Office
Smith Dental Office
02:58 PM
Default Office Set
Smith Dental Office
02:58 PM
Linked To
03:35 PM
Work Pad
Signature

Chairside

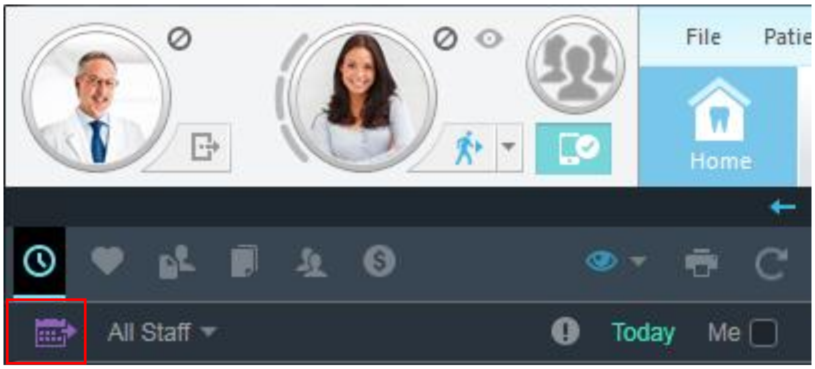
Patient History Overview

	Notes that are made from staff members for staff members in your office.
	General notes created for the patient.
	Notes regarding referrals, includes referred by and referred to.
	Notes related to financial actions.
	Medical notes.
	Allows user to navigate to a different date in patient's history.
All Staff	Shows history items from specific staff members.
	Closes patient history.
	Select from **Full Refresh** or **Latest**. **Full Refresh** will refresh all the history items. **Latest** will refresh for the latest items.
	Prints patient history with ability to choose dates and other options.
Me	Shows what the current user has done for the patient.
Today	Displays history items for the current day.

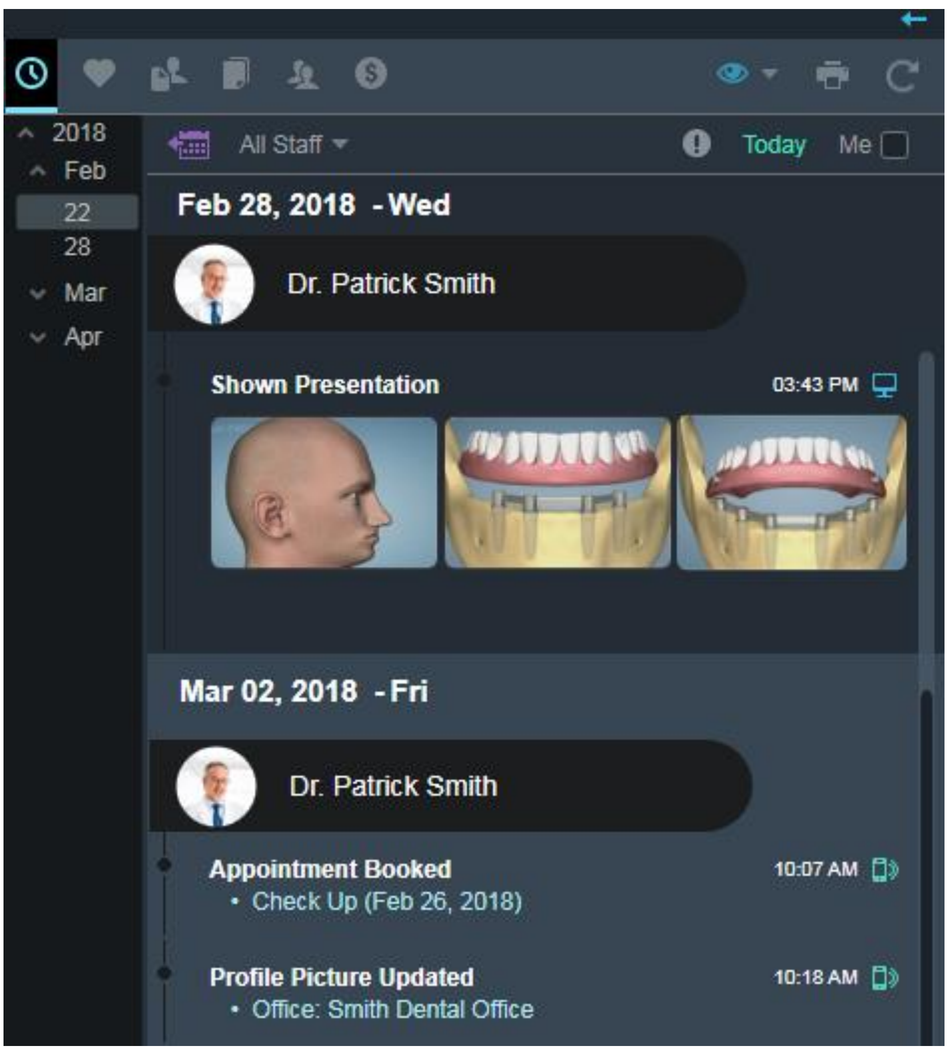
Chairside

Date Picker

Click the **Date Picker** button.



Expand the year and month. Select the date you wish to navigate to. History items for that date will now be displayed.

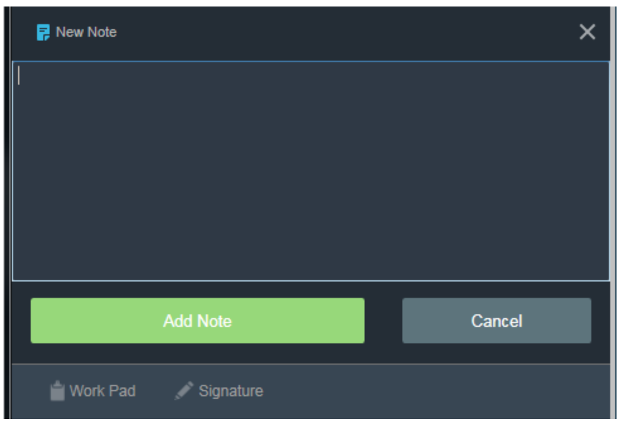


Chairside

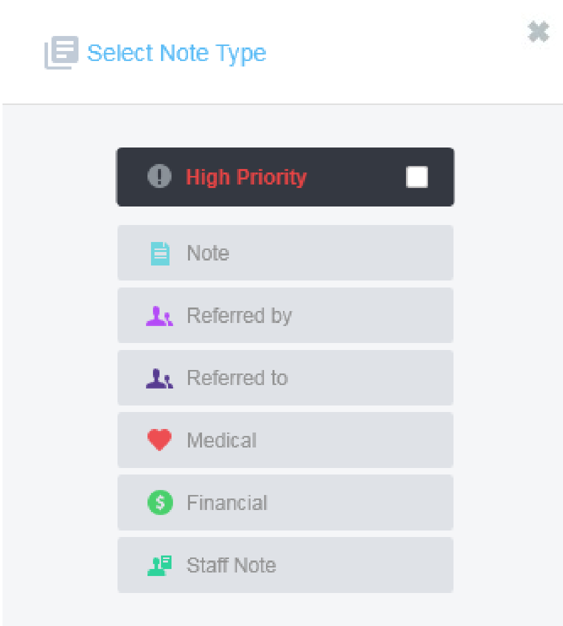
Inserting Notes into History

Click **Work Pad**.

Enter a note you would like to add. Click **Add Note** when complete.

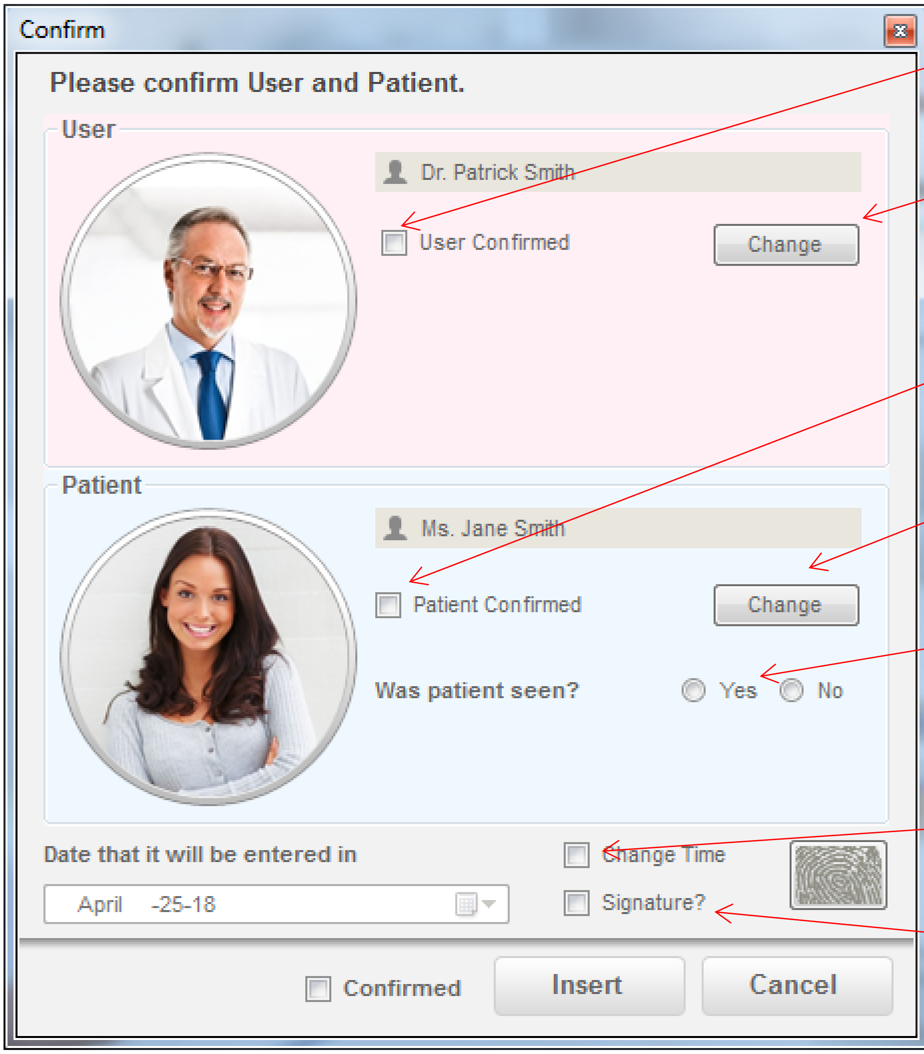


Select the type of note you have entered.



Chairside

Confirm all checkboxes and click Insert when complete.



Confirms the user creating the note.

Changes user if the incorrect one is logged in.

Confirms the note is for this patient.

Changes patient if the incorrect one is logged in.

Indicates if the patient was seen while creating the note.

Changes the date of the note .

Ability to obtain signature for doctor and patient.

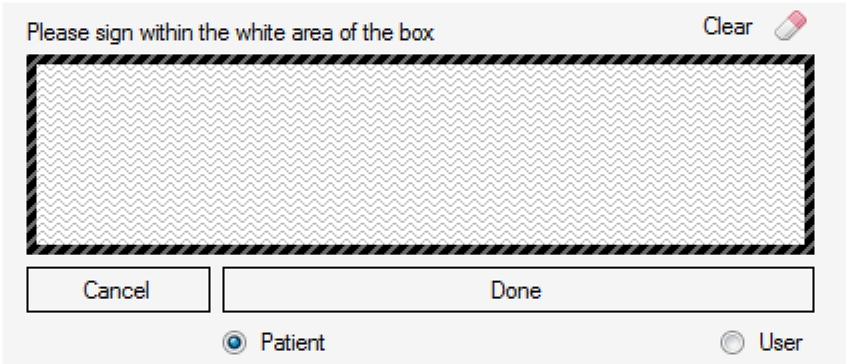
Obtaining Signature in History

Click **Signature**.

Select if the patient or the user is signing.

Sign in the black border. Click **Done** when complete.

Chairside



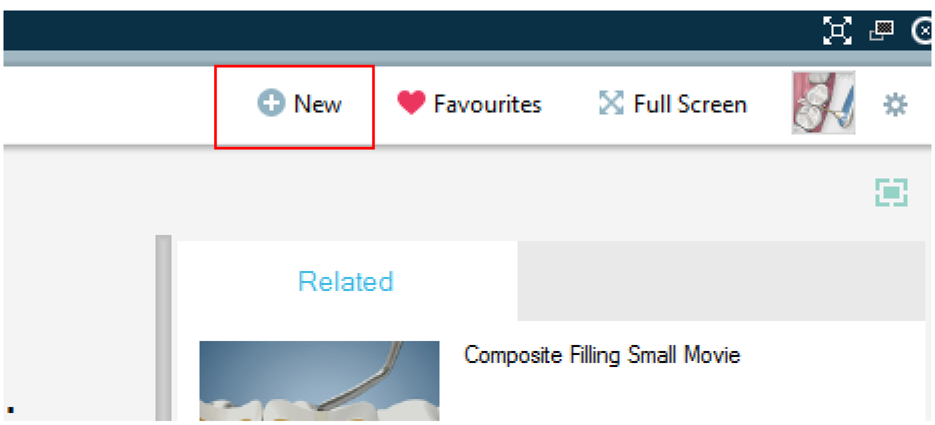
Editing or Creating a New Presentation

You can customize any of the Chairside presentations by adding your own photos, videos, text and audio.

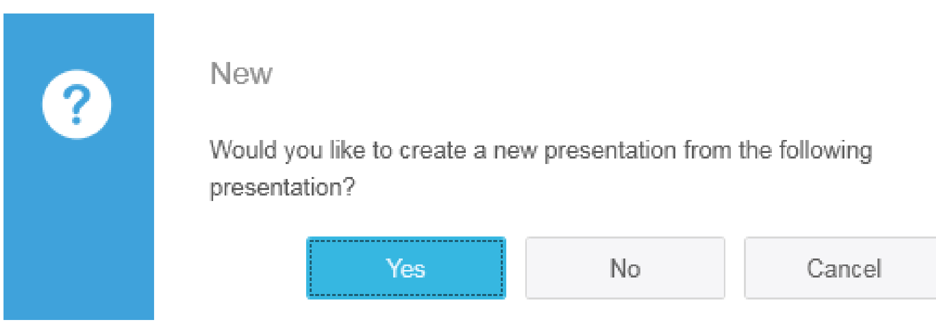
To edit an existing presentation, view the presentation you would like to edit.

If you click **New Presentation while not viewing a presentation, you will be creating a new presentation from scratch.

Click **New Presentation** located in the tool bar.

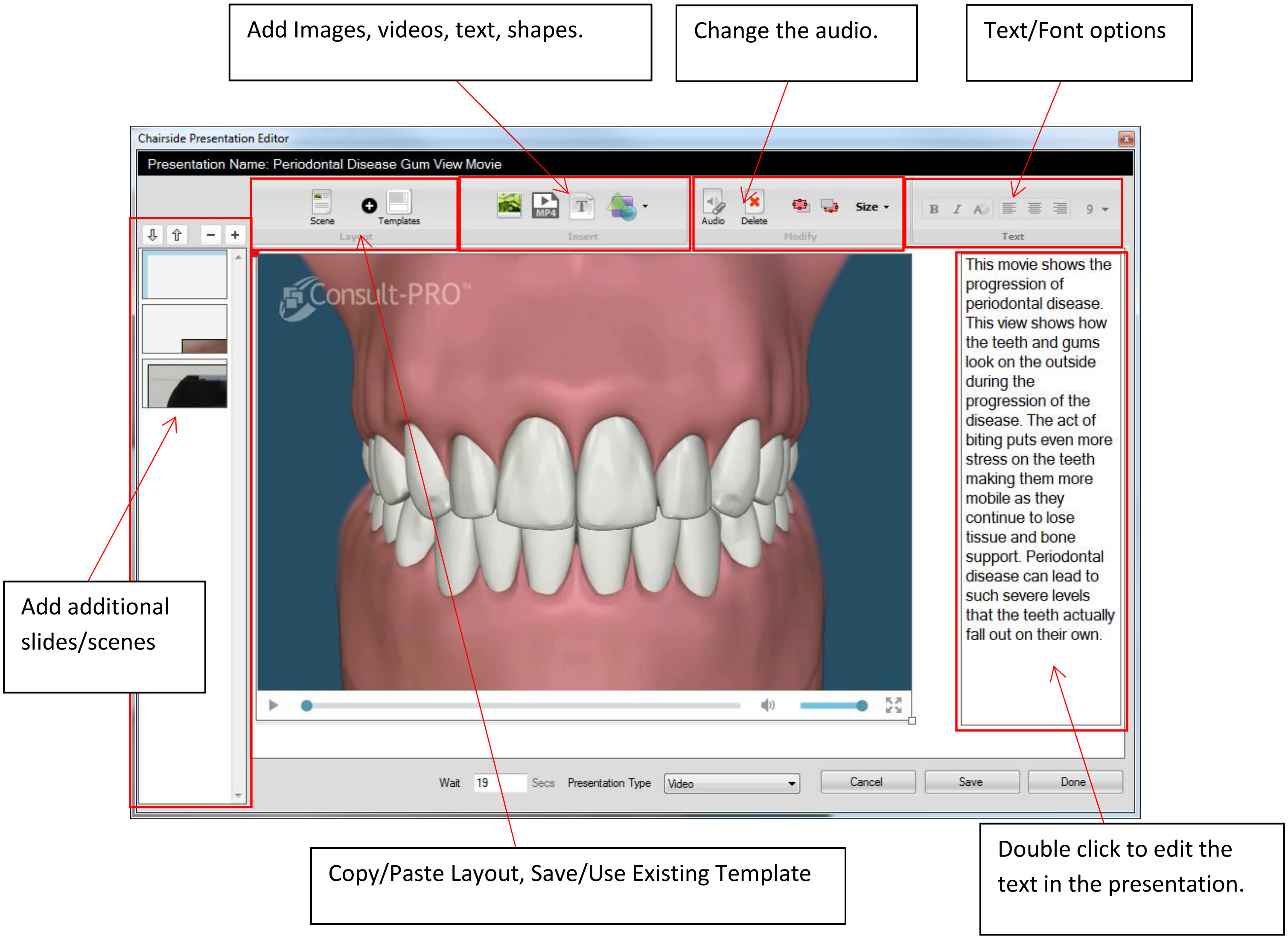


Click **Yes** to continue. Clicking **No** will allow you to create a new presentation from scratch.

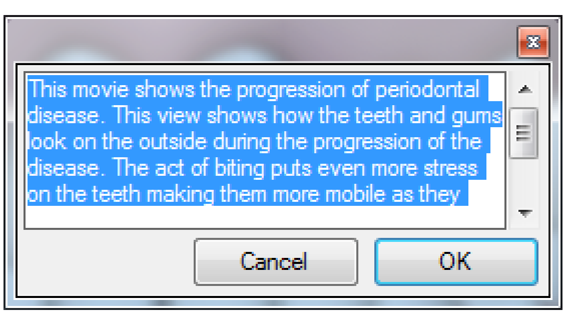


Chairside

You will be taken to the **Chairside Presentation Editor**. Here's an overview of what you can do with this tool.



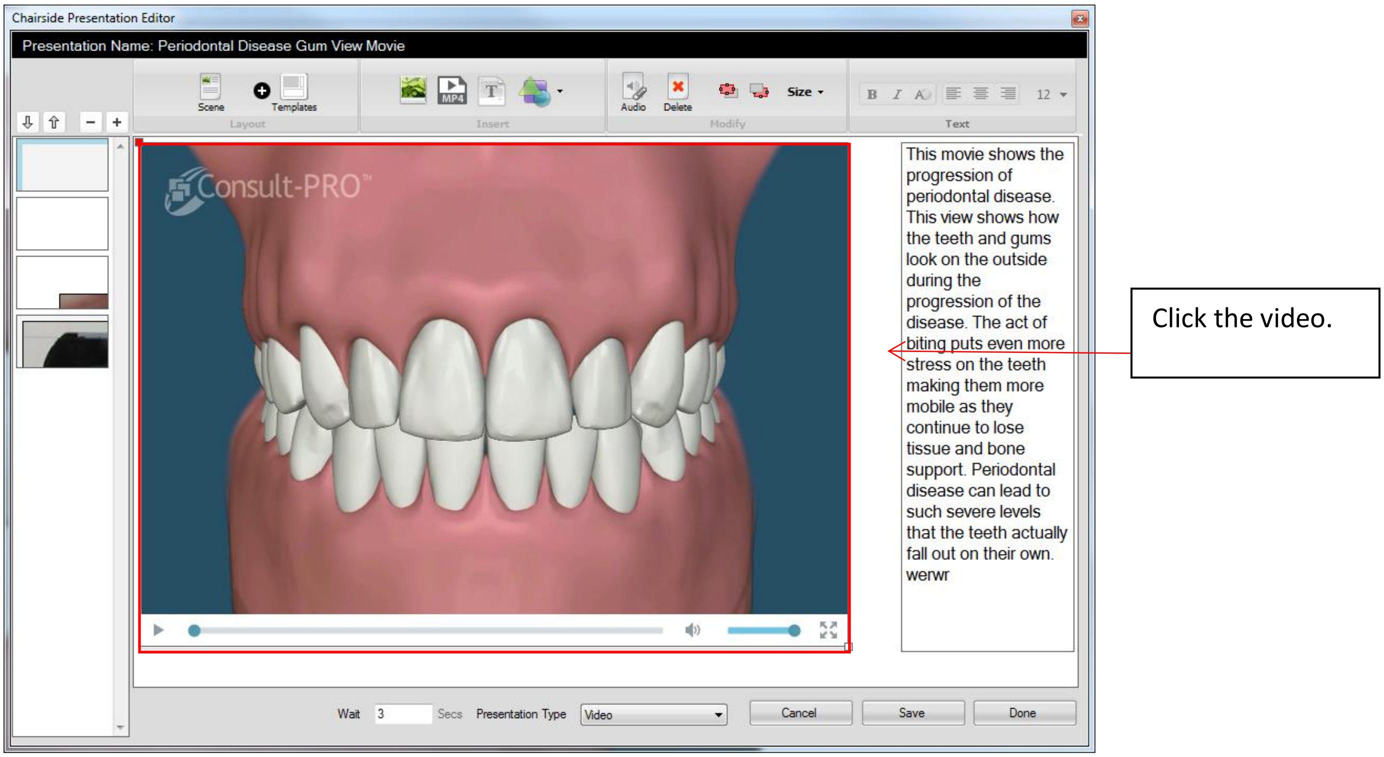
To edit existing text, double click the presentation text. The text editor window will pop up. Click **OK** when complete.



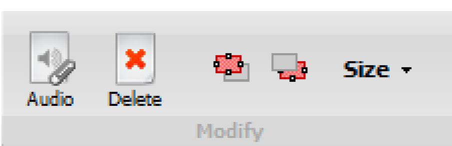
Chairside

Replace existing audio with your own audio recordings with a microphone. You will need to select a video to add new audio. Click the video in the presentation editor.

Replacing Audio

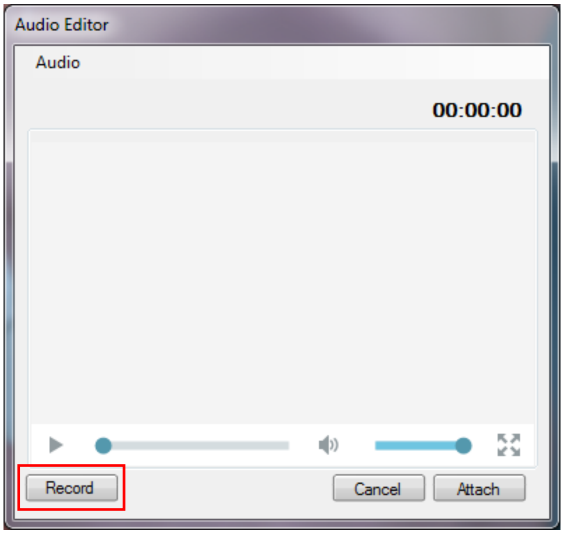


Click **Audio.**

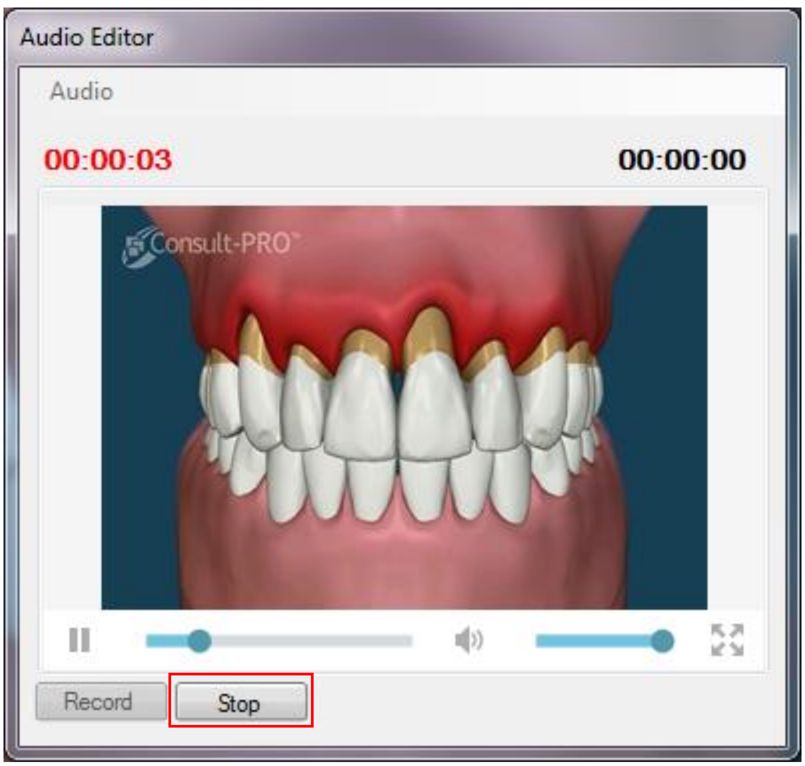


Click the **Record** button.

Chairside

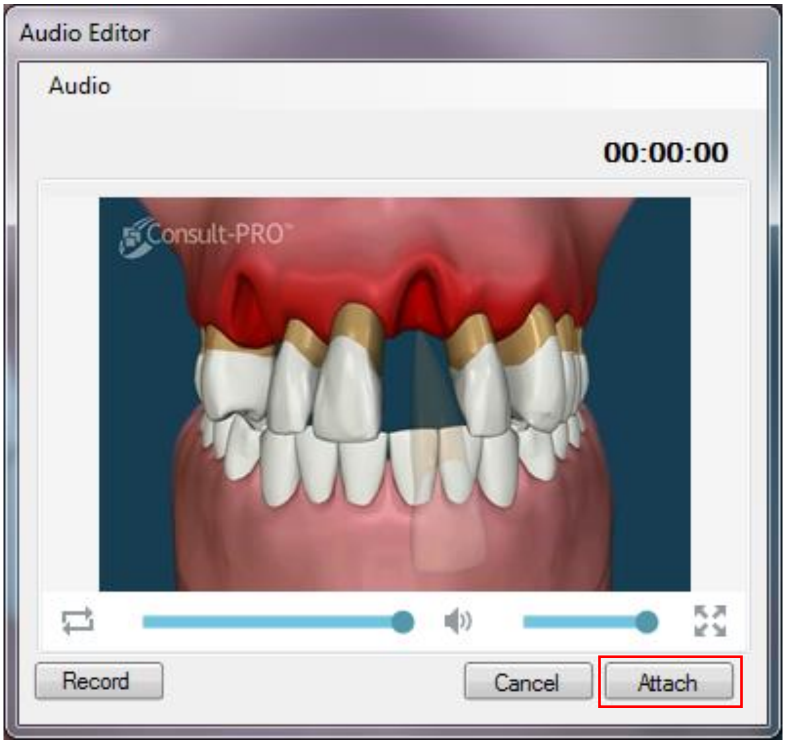


Begin speaking into your microphone. Click **Stop** when complete.



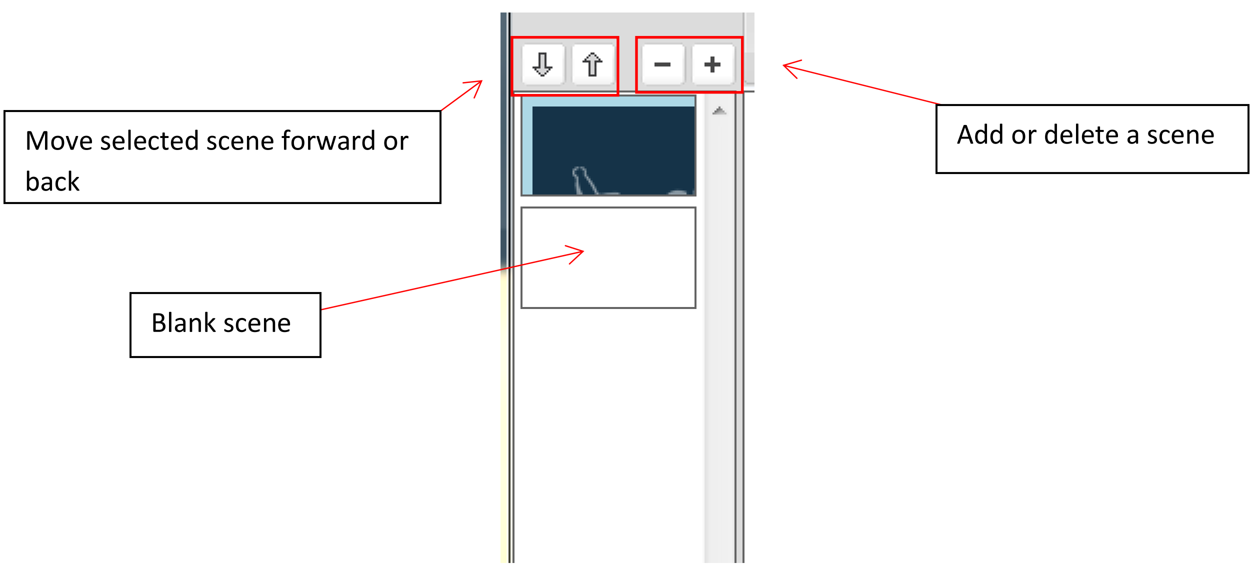
Click **Attach** to replace the video's audio with your recording.

Chairside



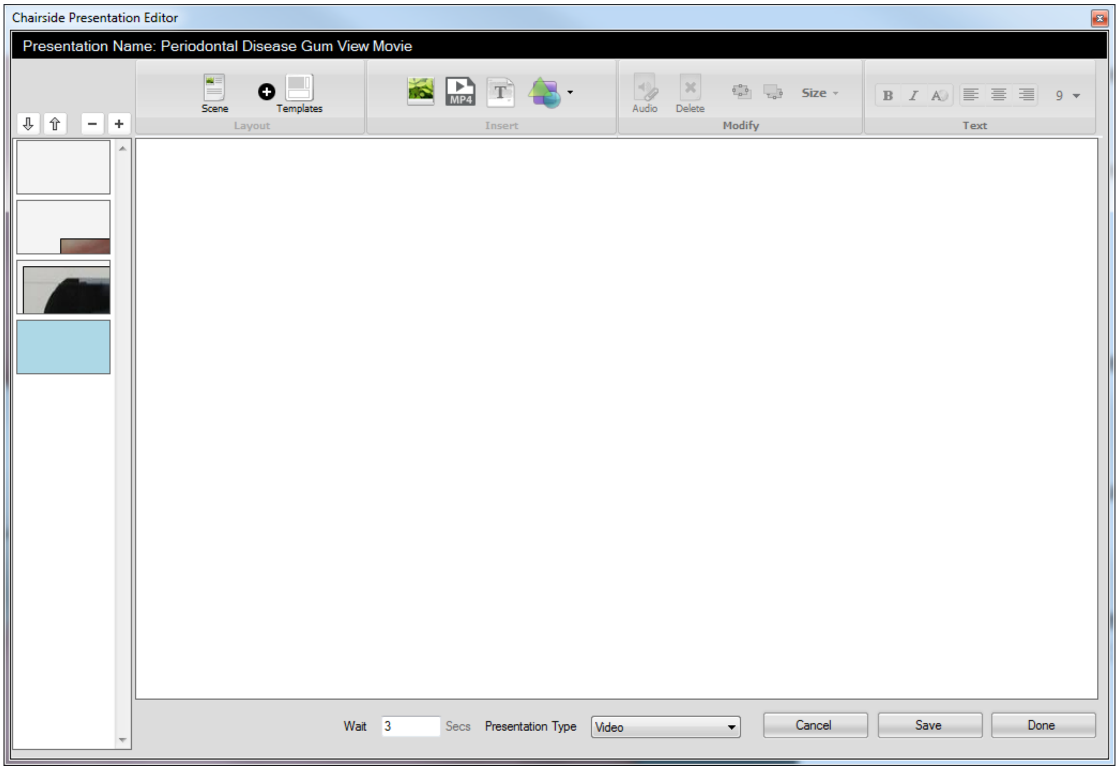
Adding or Deleting Scenes

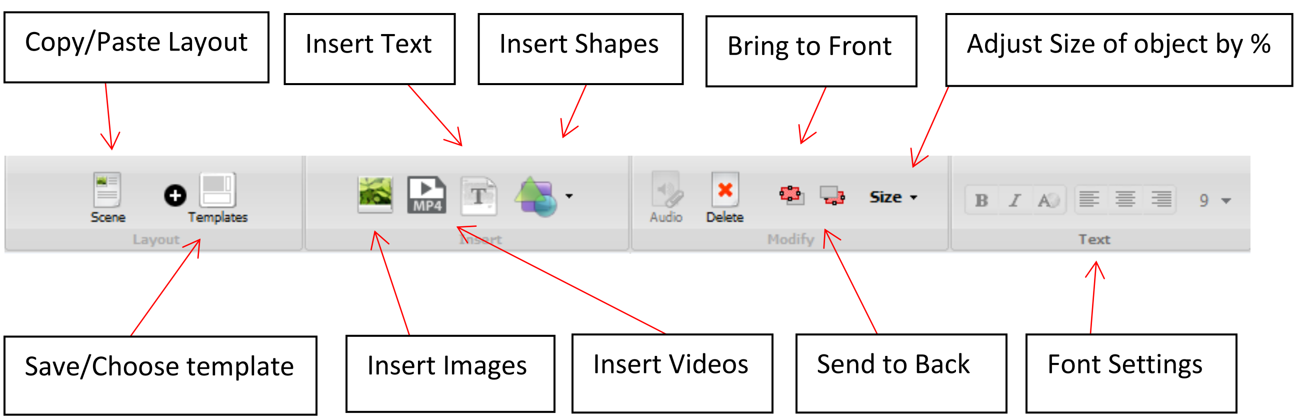
To add an additional scene, click the **+** button. You can remove a scene by selecting the scene and clicking the **–** button. Clicking the up and down arrows rearranges the scene order. You can populate the scene with images, videos, text or shapes.



Click the blank scene. The editor will now show a blank scene, ready to be populated.

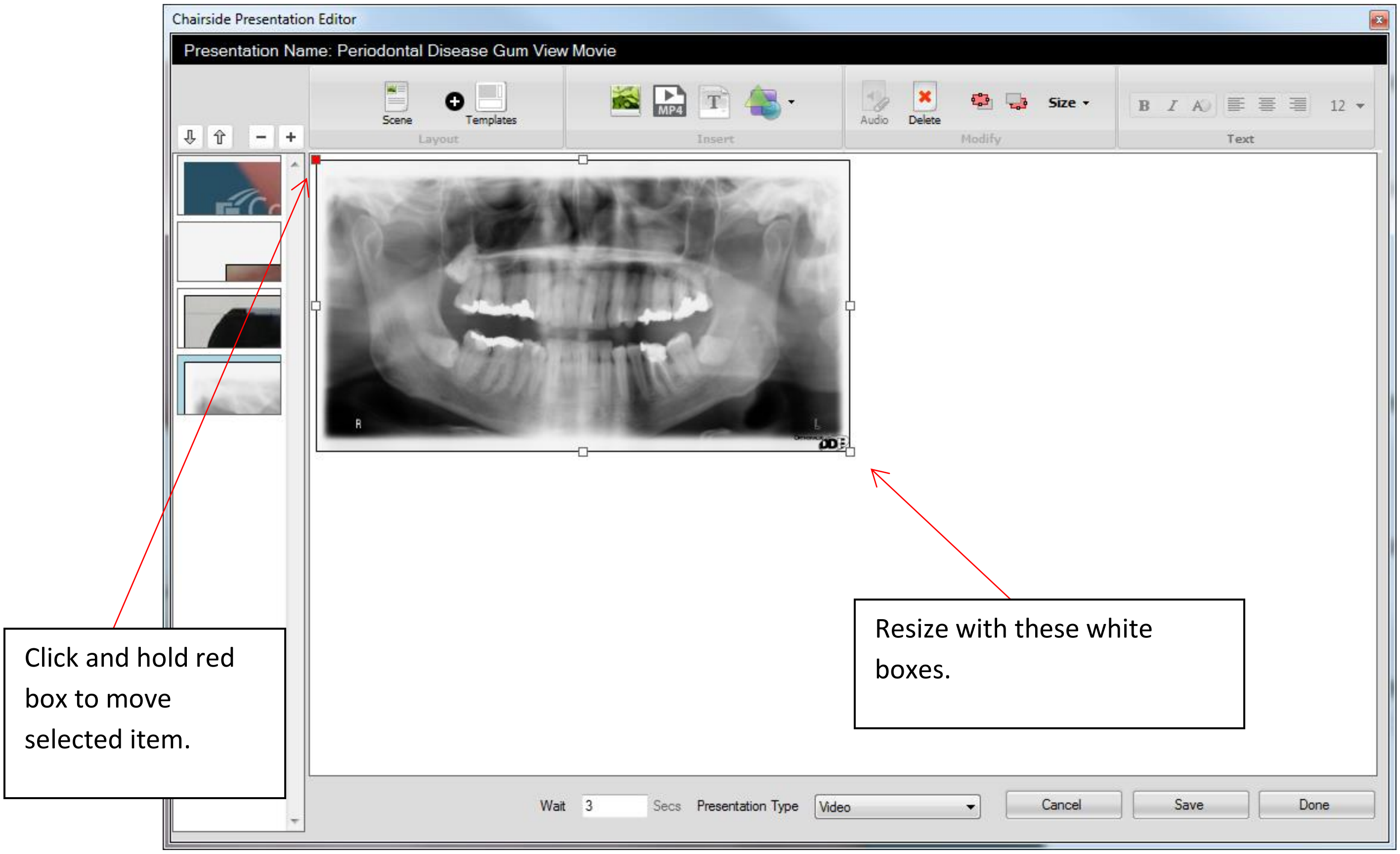
Chairside





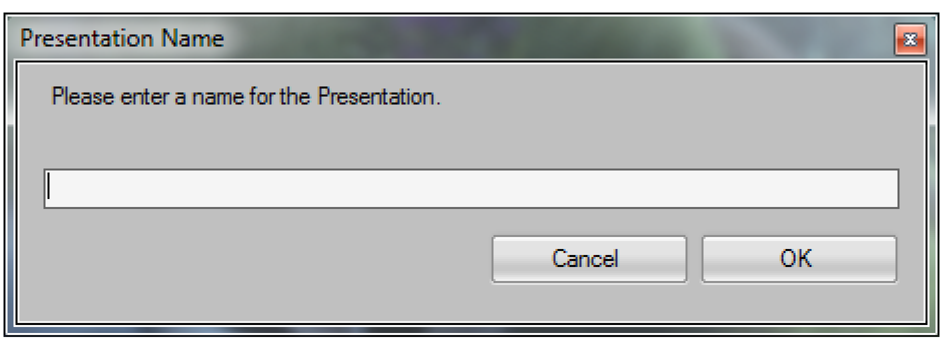
Click any of the tools in the **Insert** menu to add Pictures, Video, Text, or Shapes.

Chairside



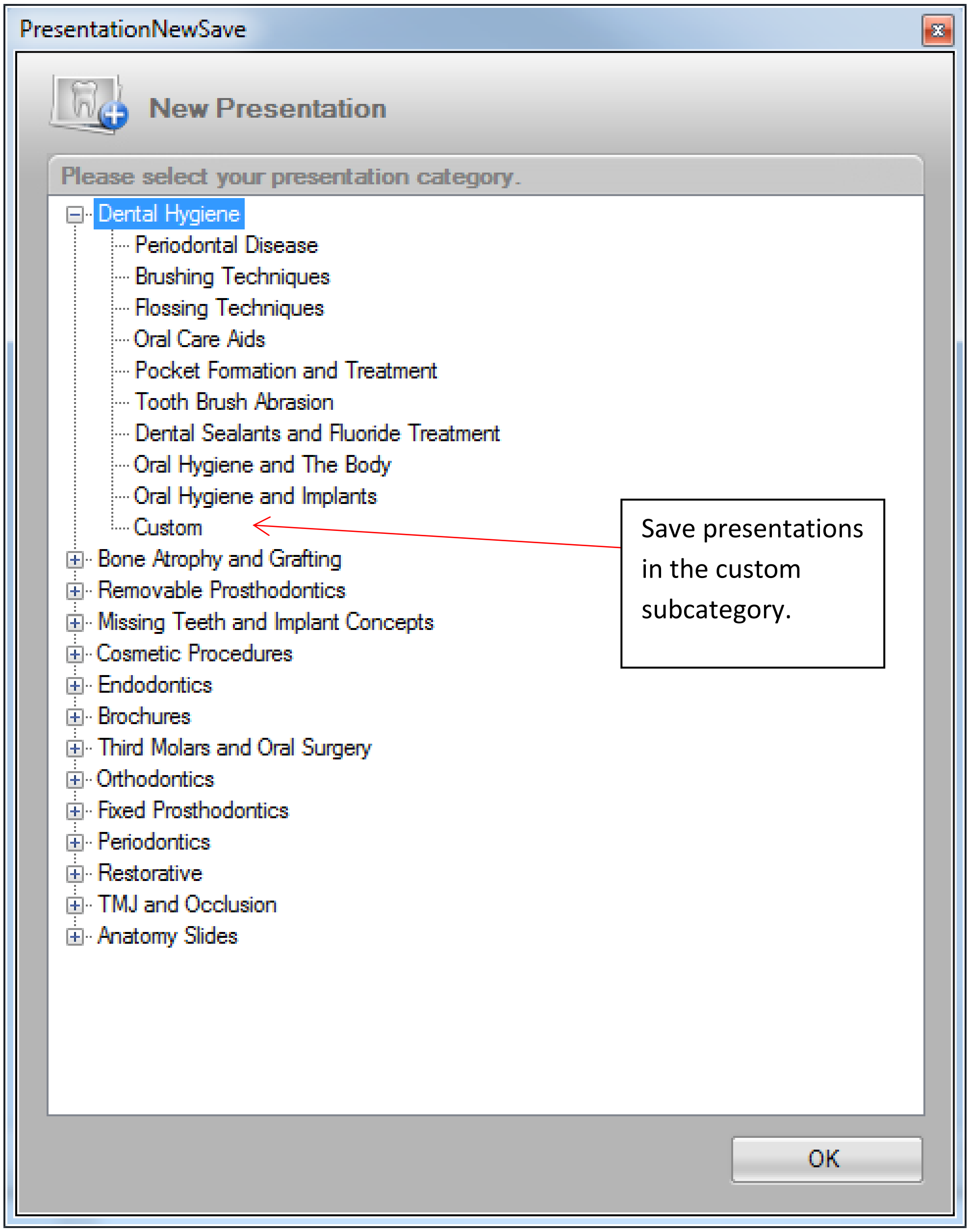
Images, movies, text and shapes can be resized and moved in the same fashion. Click **Save** when complete.

You will be asked to enter a name for your presentation. If you are editing an existing presentation it will create a new presentation. Enter a name for the presentation and click **OK**.



You will be asked where you want to save the presentation. Every category has a custom subcategory. We recommend you save it here but you can save it anywhere. Click **OK** when complete.

Chairside

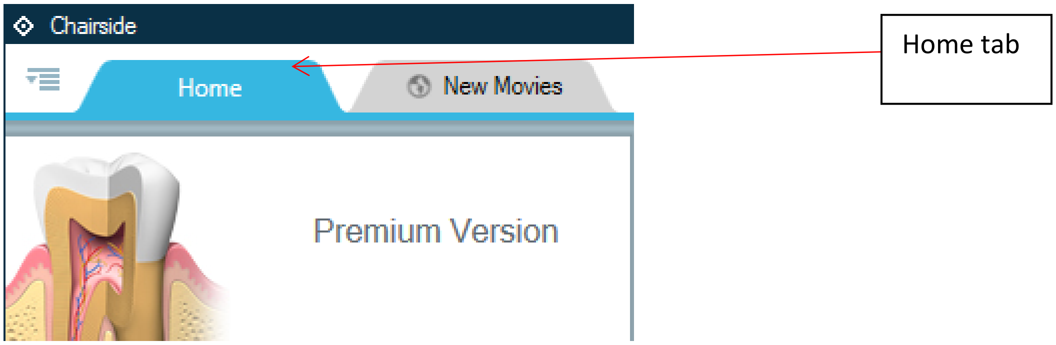


Custom presentations are viewable in two places:

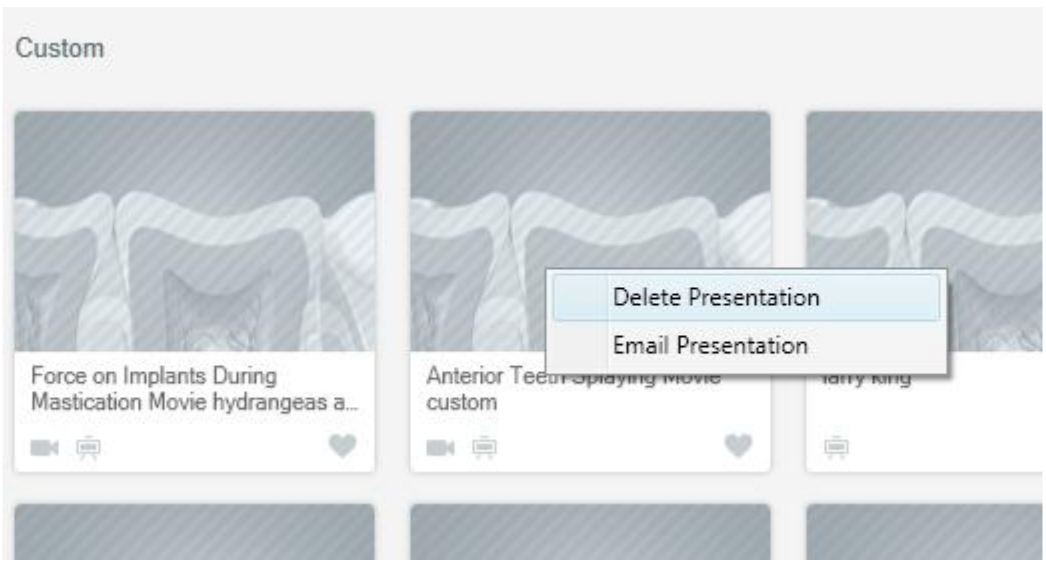
1. Where you have specified them to be saved.

2. At the bottom of the **Home** tab if you are logged in.

Chairside



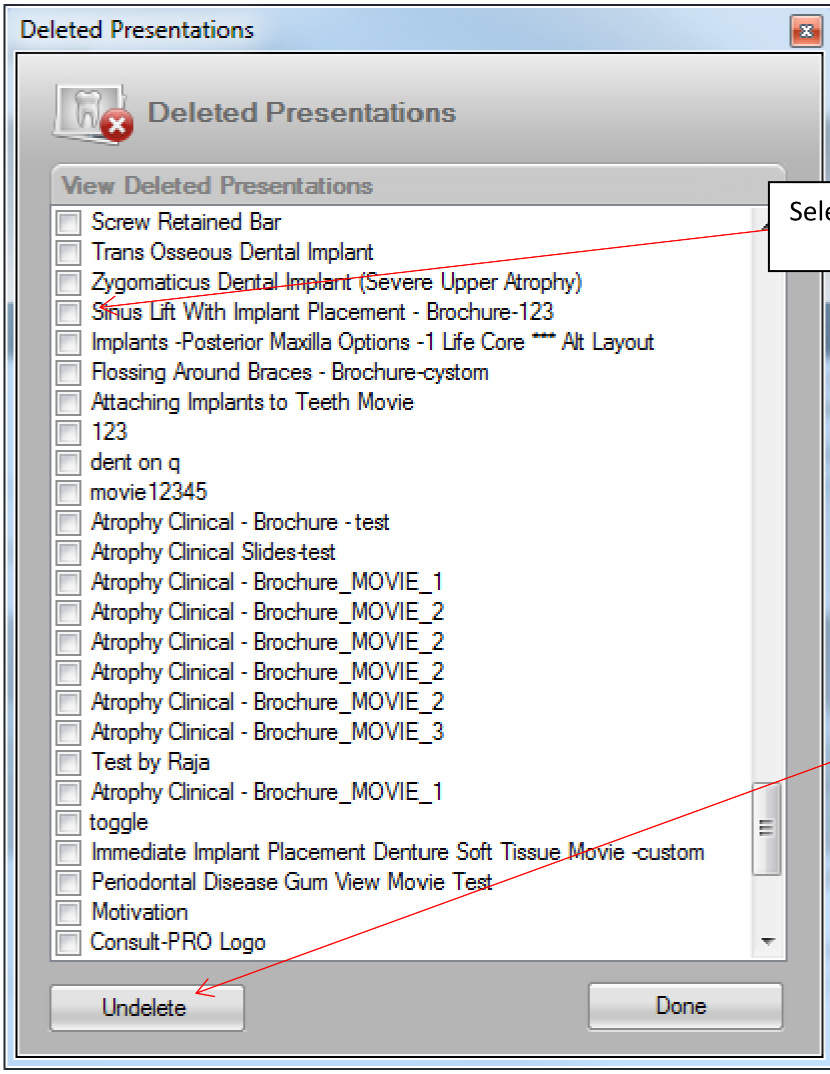
Scroll to the bottom in the **Home** tab and you'll find all your custom presentations in a group. Right click any custom presentation to delete the presentation.



If you wish to undelete any deleted custom presentations, click the **Deleted Presentations** button.

From there select the presentation you wish to undelete and click the undelete button to restore the presentation.

Chairside



Select Presentation(s) to undelete.

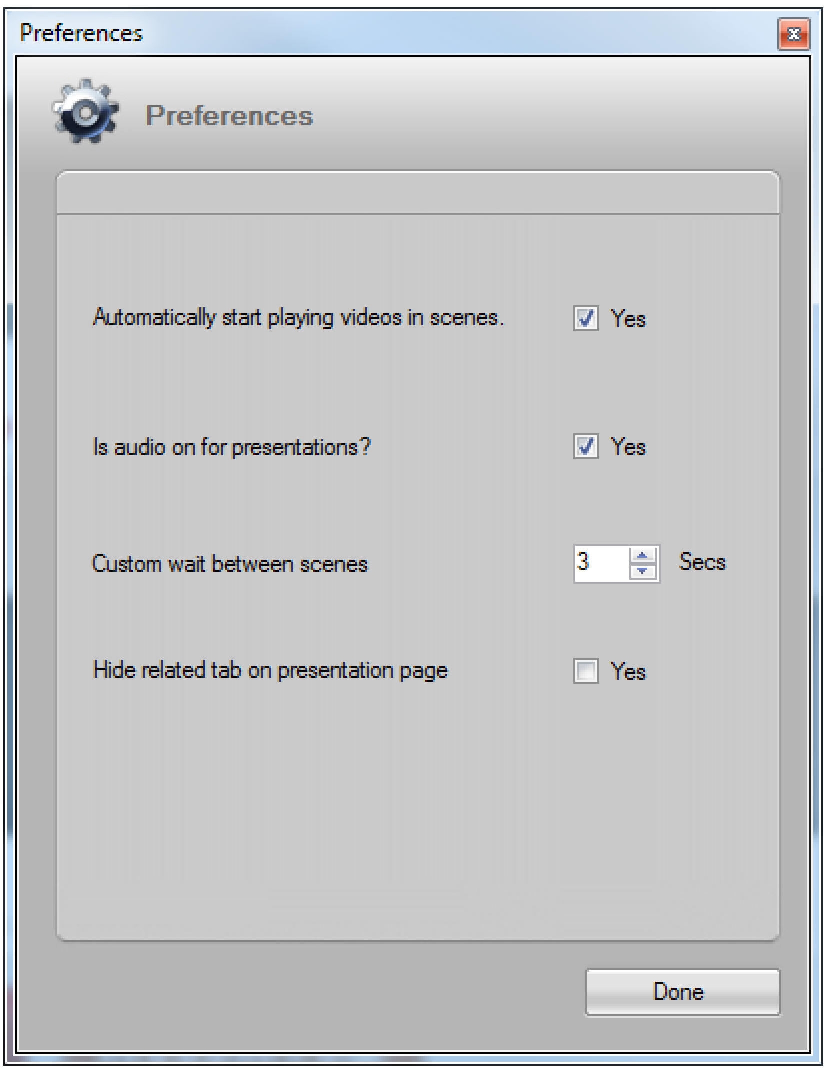
Click **Undelete.**

Chairside

Chairside Preferences

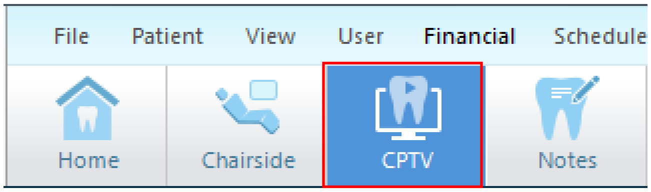
Login with a user. Click the **Config** button.

Click the checkbox to enable or disable the settings.
**These settings are only for the user logged in.

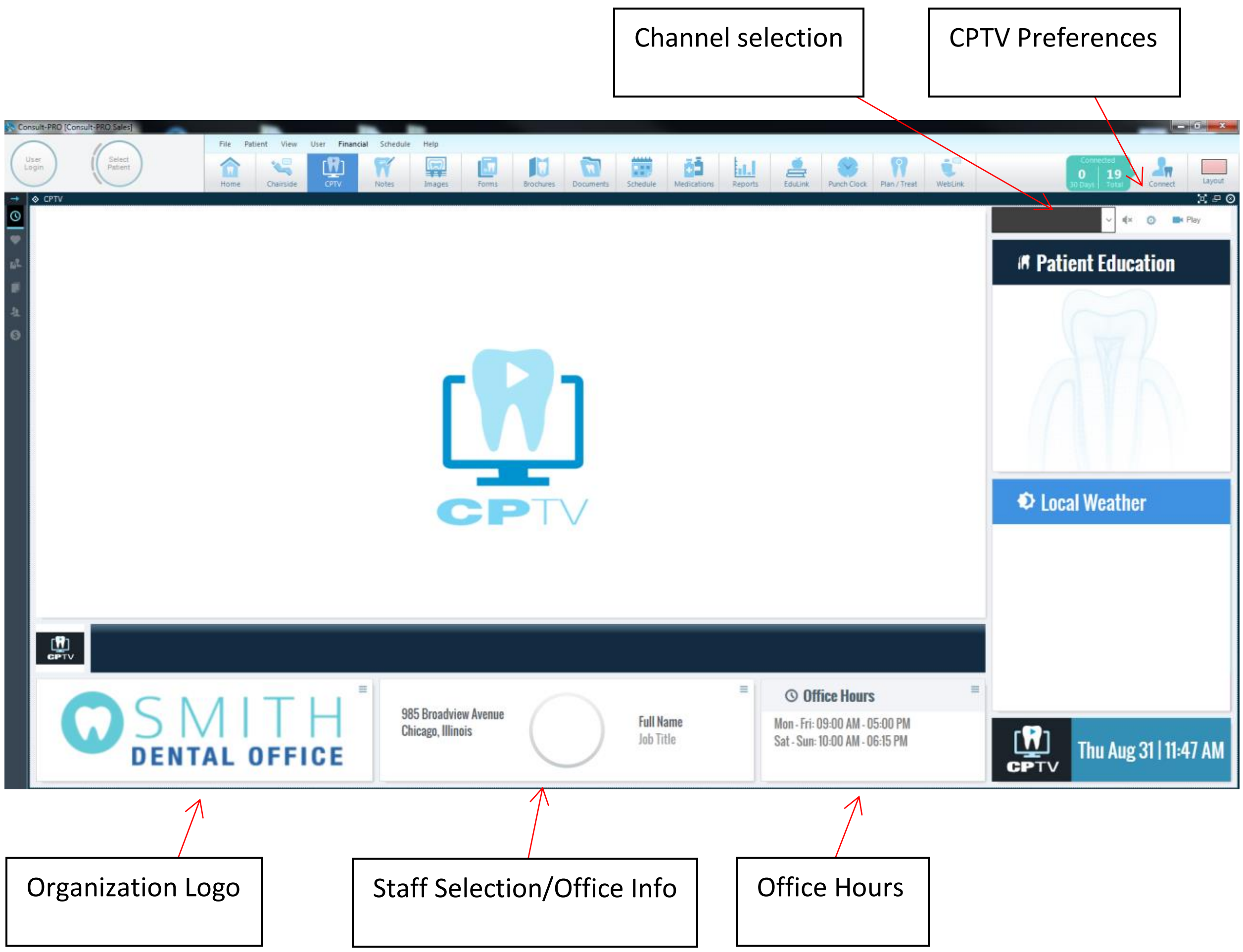


CPTV

To begin customizing CPTV, login as the administrator and click the **CPTV** button.



CPTV Overview:



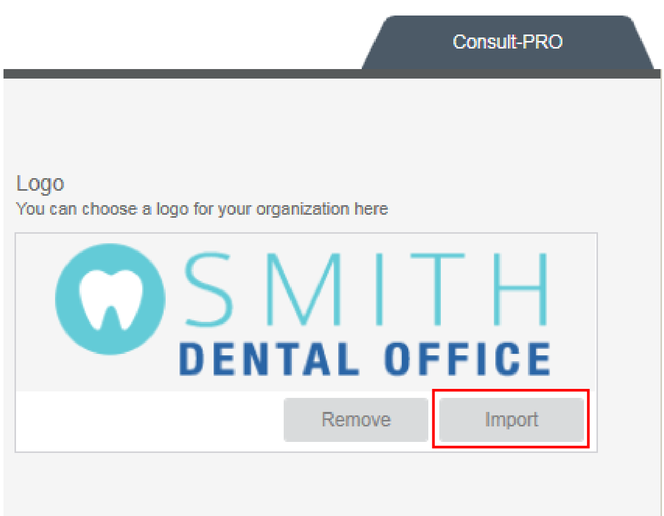
CPTV

Setting Organization Logo in CPTV

Click the **Menu** button located at the top right of the **Organization Logo**.

Select the **Organization** tab.

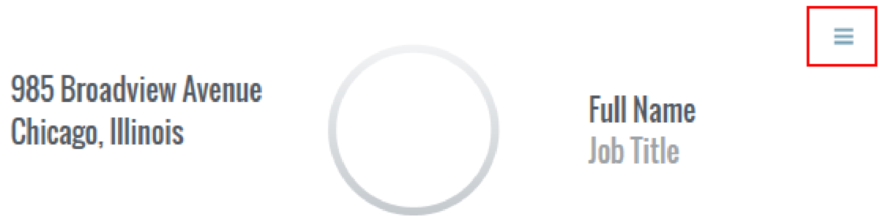
Click **Import** and select your logo from your computer.



CPTV

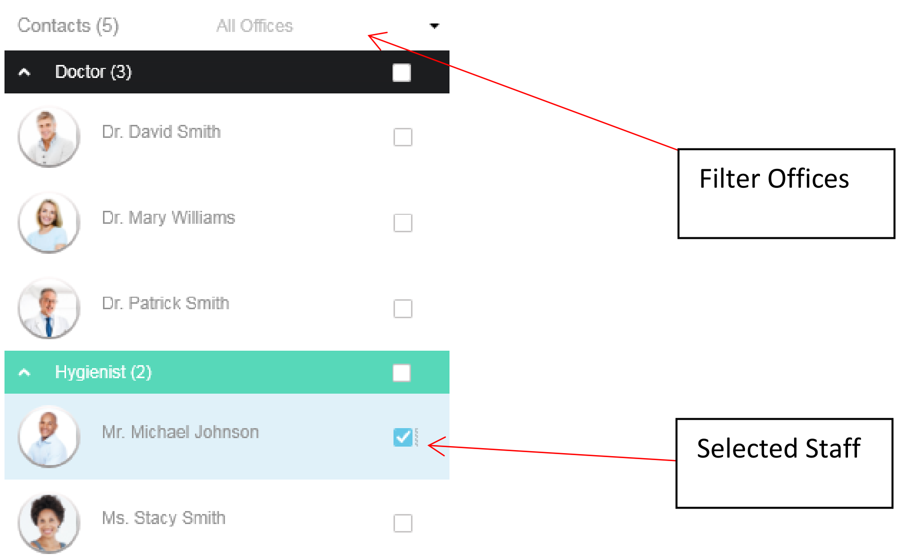
Displaying Staff on CPTV

Click the **Menu** button located at the top right of **Staff Selection**.



Scroll through the staff and select the staff members you want to display on CPTV. If you have multiple offices, click the **All Offices** drop-down menu to filter your specific office.

**Staff members with a Doctor or Hygienist type can only be used.

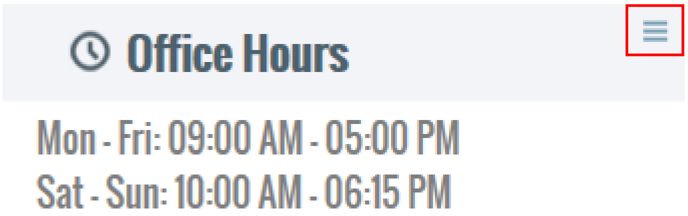


Click **OK** when complete.

CPTV

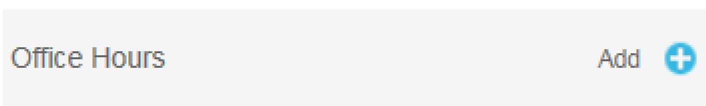
Setting Office Hours

Click the **Menu** button located at the top right of **Office Hours**.

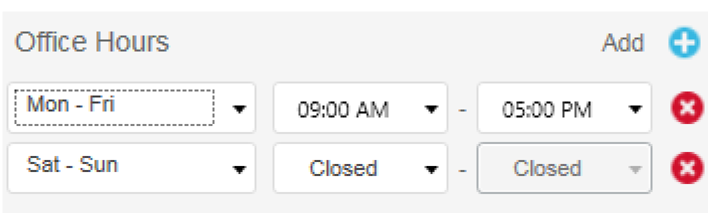


Select your appropriate office.

Click the **Add** button to enter a new row.



Select the days and time using the drop-down menu. Click the  button to remove any rows.



Click **Save** when complete.

CPTV

Setting CPTV Preferences

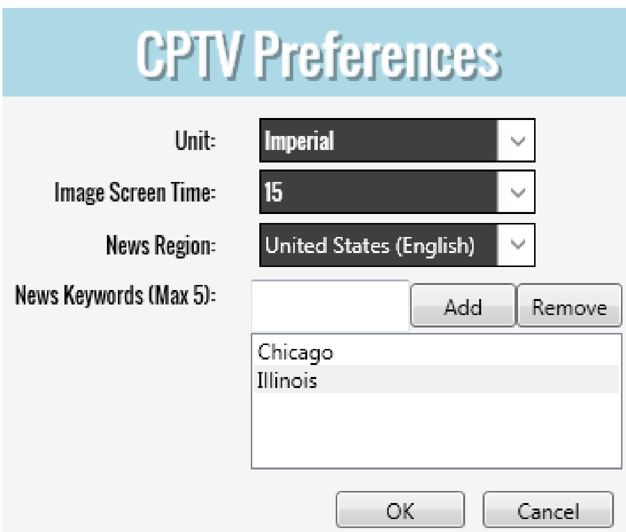
Click the **CPTV Preferences** button.

Unit: Displays temperature in Imperial or Metric.

Image Screen Time: Sets the amount of time Fun Facts are displayed.

News Region: Displays news related to the specified region.

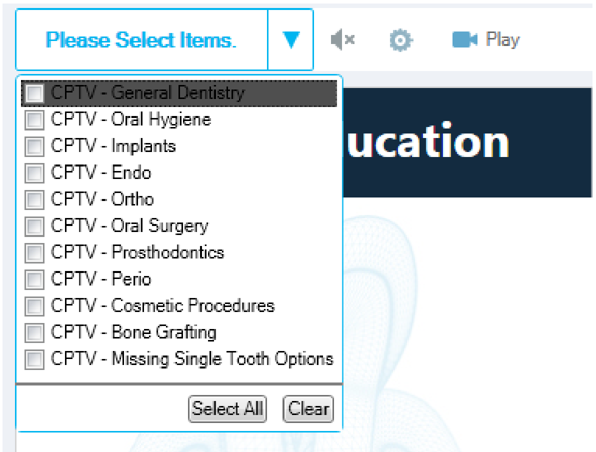
News Keywords: Filters news related to keywords with high priority. Enter your keyword and click **Add**. To remove a keyword, select the keyword and click **Remove**.



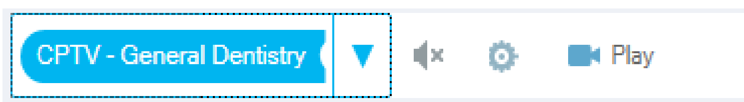
CPTV

Playing CPTV Channels

Click the drop-down menu and select your channels.



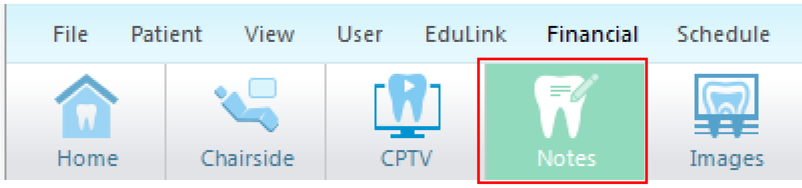
Click to enable the audio. This icon indicates CPTV will play with audio. Click Play to begin playing your channel.



CPTV is now playing.

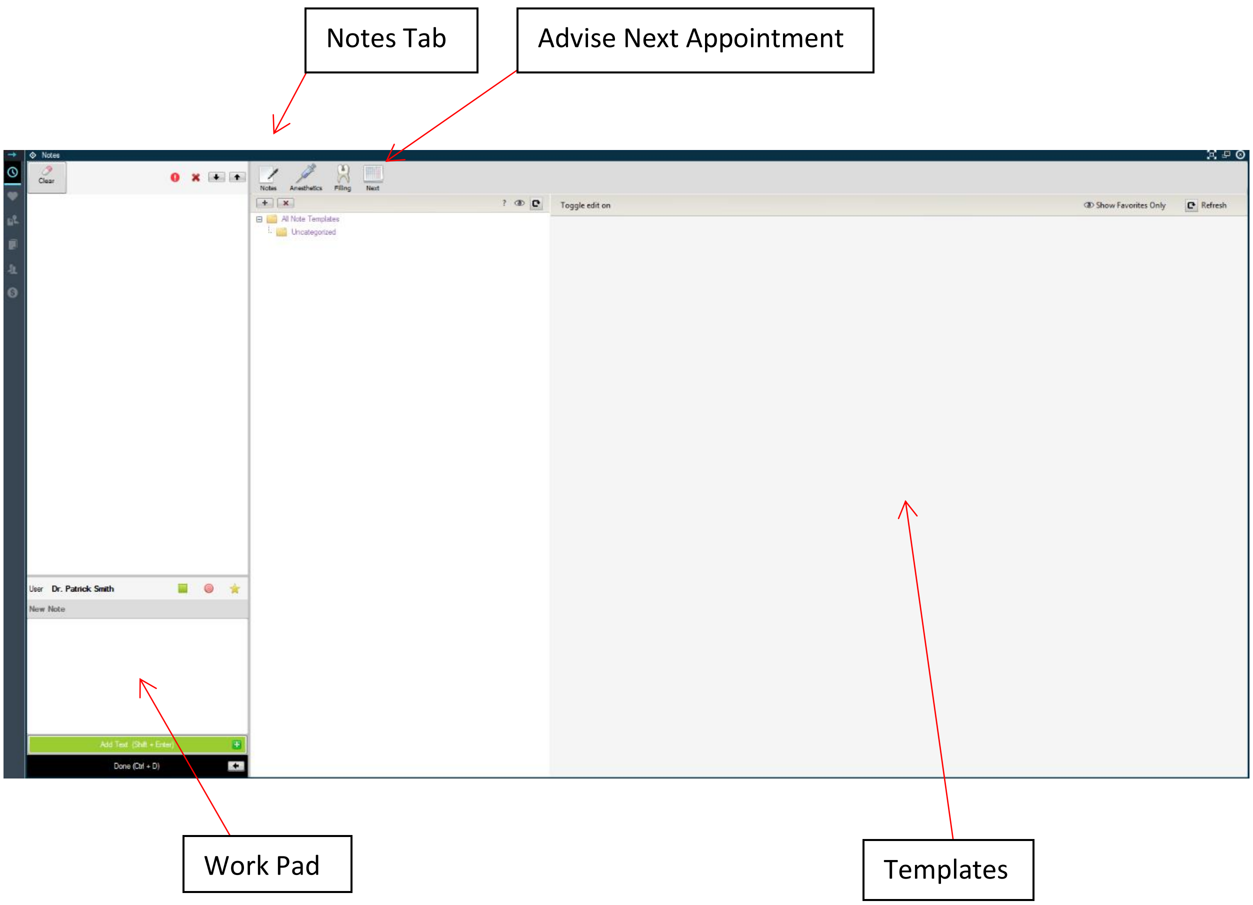
Notes

Consult-PRO Notes allows you to add notes into the patient history and create tentative appointments. Please login with a user and patient. Click the **Notes** button.



You will now be taken to the **Notes** menu.

Notes Overview:

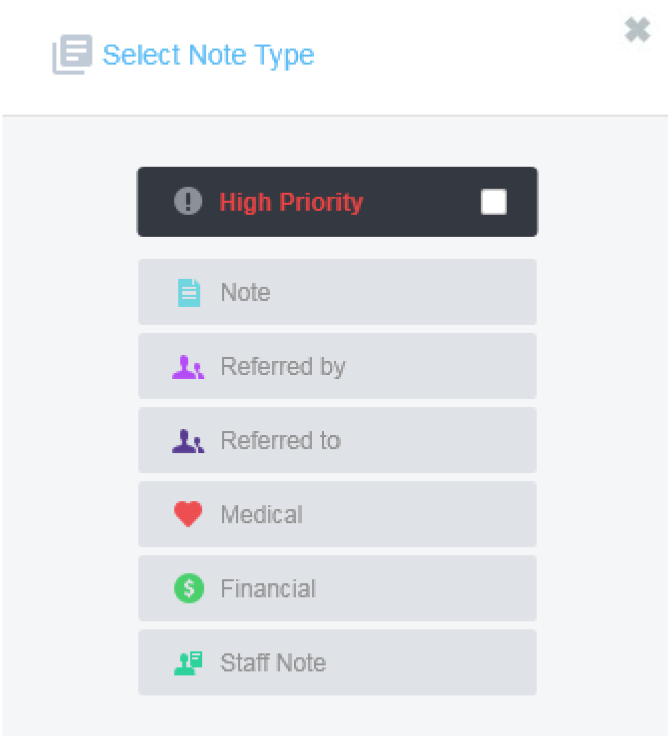


Notes

Entering Notes in Work Pad

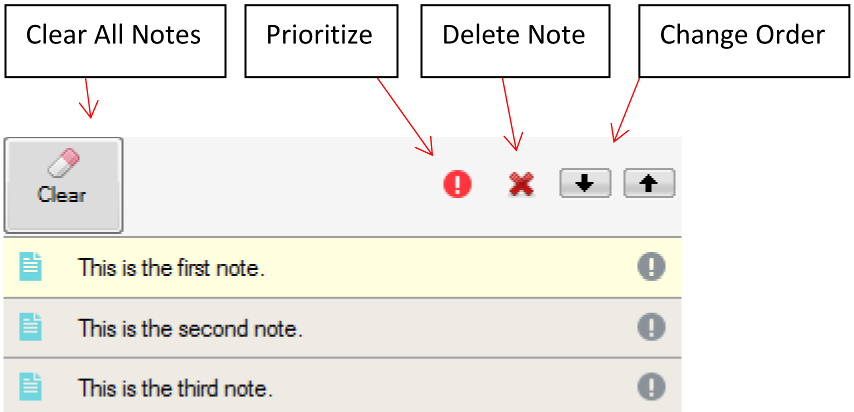
You can manually enter in notes in **Work Pad**. Click in the textbox and enter a note. Click **Add Text** when complete.

Select your Note Type. Please refer to page 45 for descriptions of the Note Types.

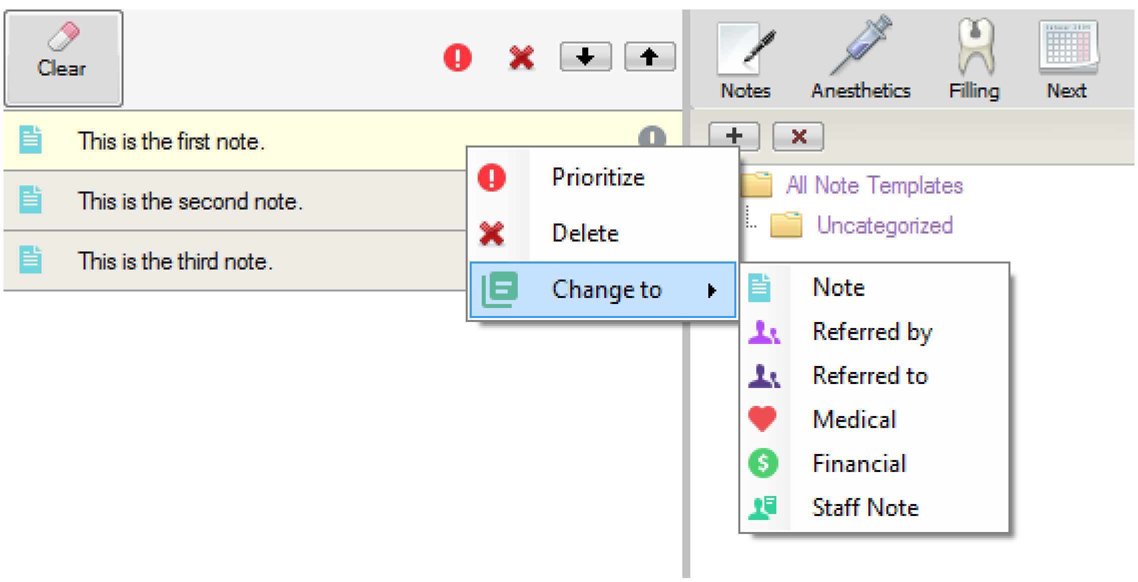


Notes

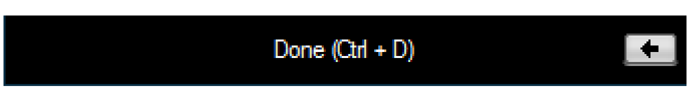
If you have manually entered several notes, you can modify them with the following tools. These tools also apply for Template Notes.



Right clicking a note provides you with options of prioritizing, deleting and changing the note type.



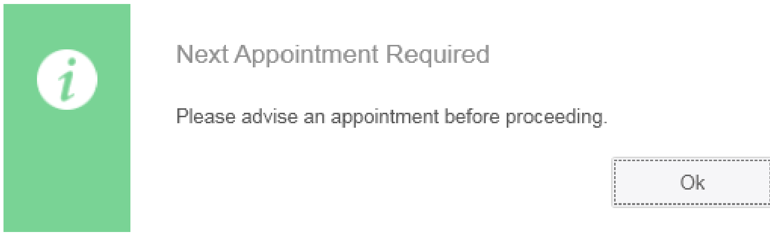
Click **Done** when complete.



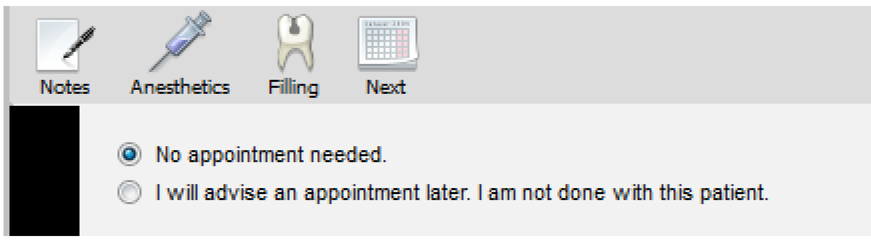
Click **Ok** to proceed.

Notes

Tentative Appointments

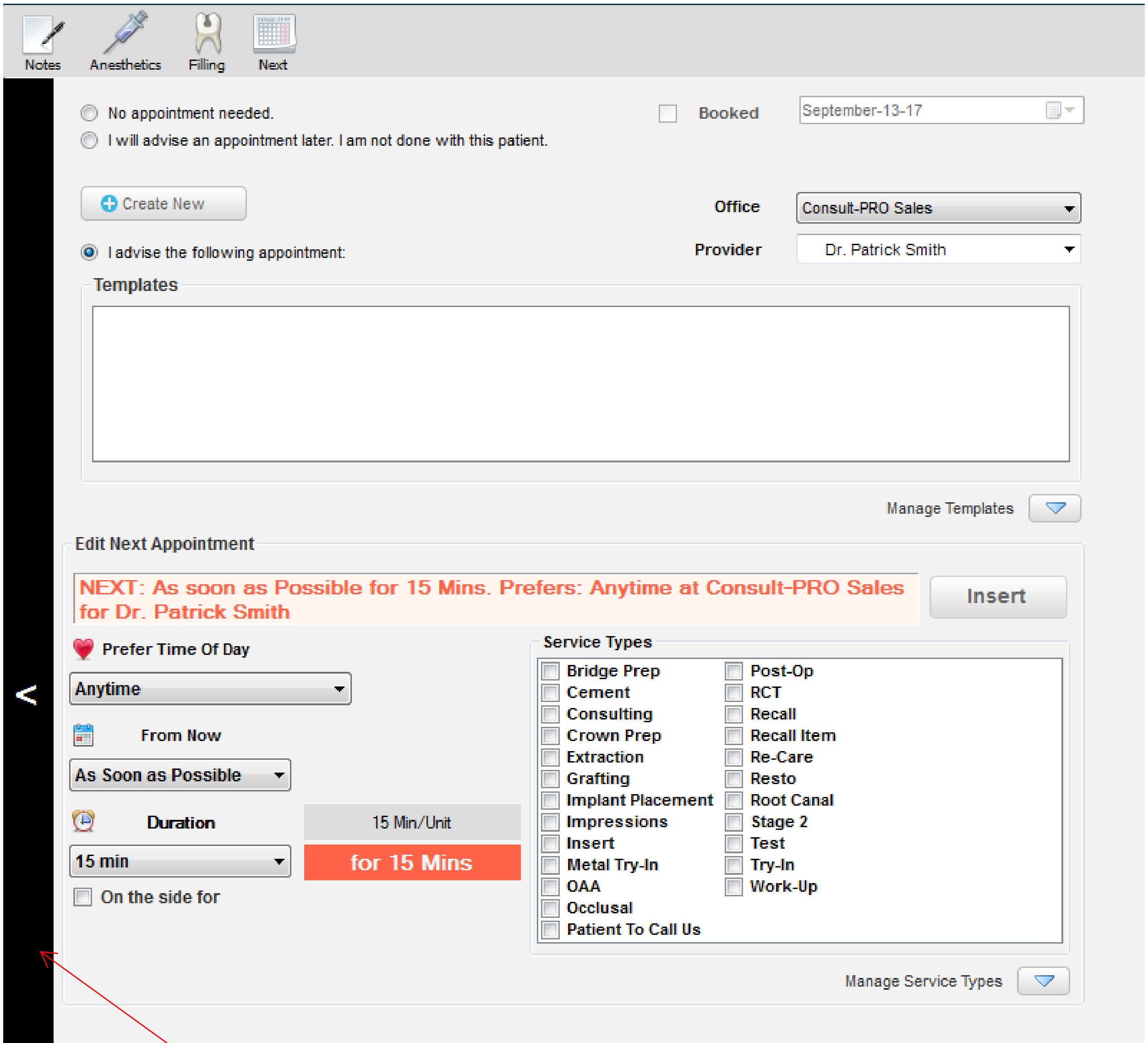


If you do not want to book a tentative appointment or wish to book an appointment later select "No appointment needed" or "I will advise an appointment later. I am not done with this patient".



If you would like to book a tentative appointment, select "I advise the following appointment". Select your **Prefer Time of Day**, **From Now**, and **Duration** of appointment.

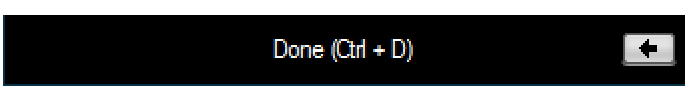
Notes



Append Button

Click the **Append Button** to add your tentative appointment.

Click **Done** when complete.

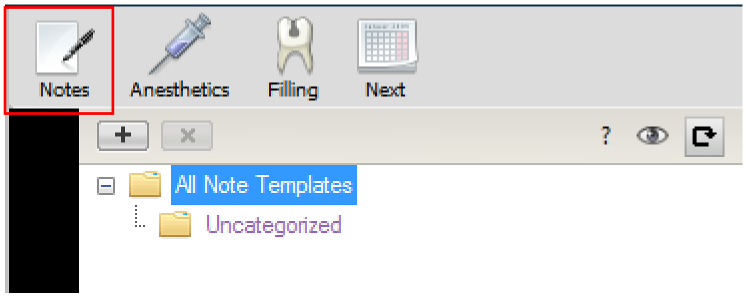


The Confirm window will popup. Please refer to page 51 for explanation of this window.

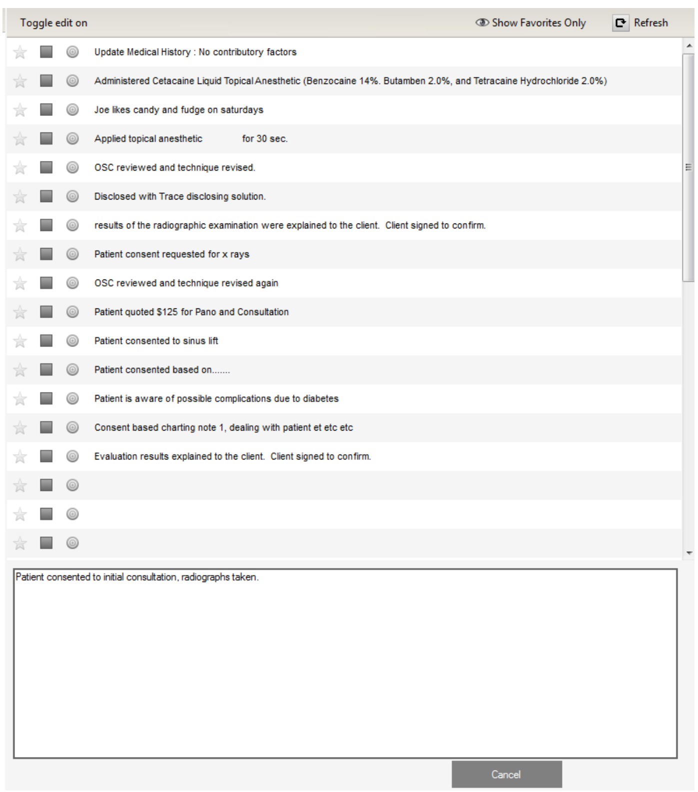
Notes

Using Template Notes

Click the **Notes tab** and select “All Note Templates”.



You will now see all the Note Templates.

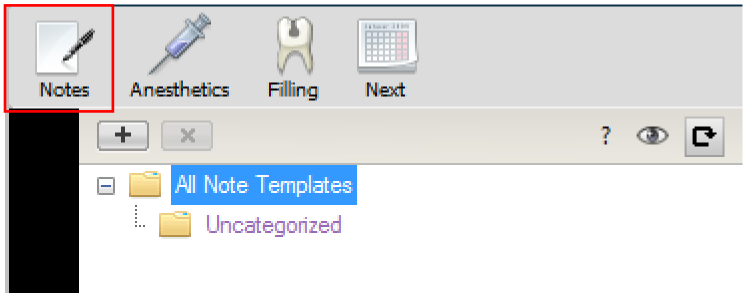


Scroll through the templates and select a template. Click the **Append** button. Click **Done** and complete the Confirm window.

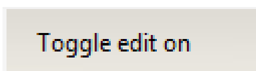
Notes

Creating Template Notes

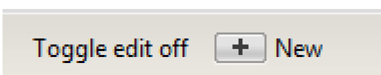
Click the **Notes tab** and select “All Note Templates”.



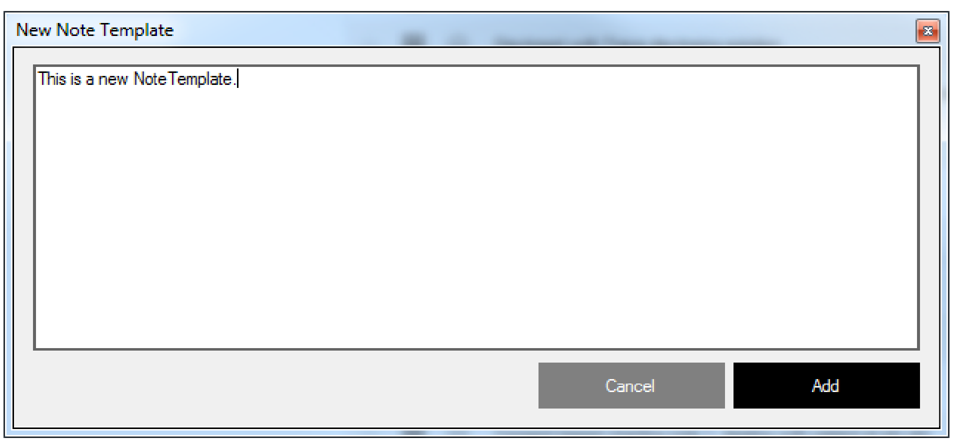
Click **Toggle edit on** to enable edit mode.



Click **New** to create a new note template.



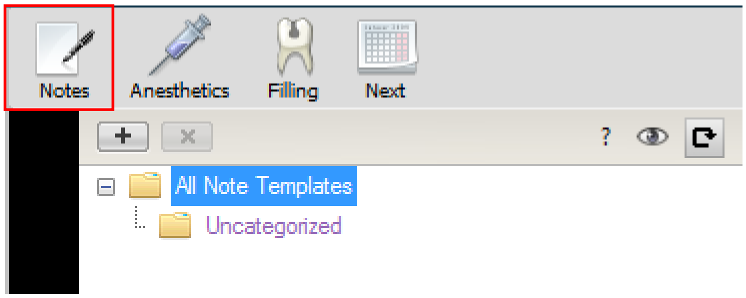
Enter your new note template. Click **Add** when complete.



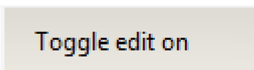
Notes

Editing Template Notes

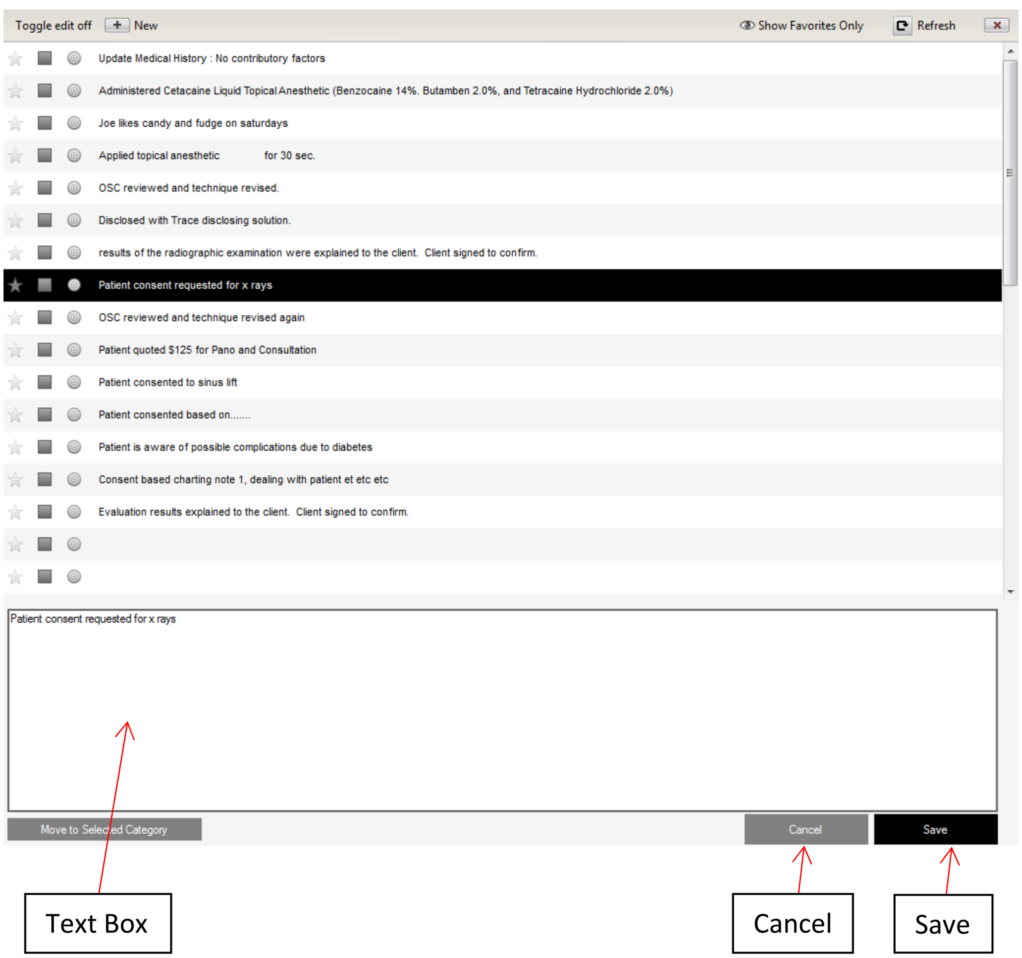
Click the **Notes tab** and select “All Note Templates”.



Click **Toggle edit on** to enable edit mode.



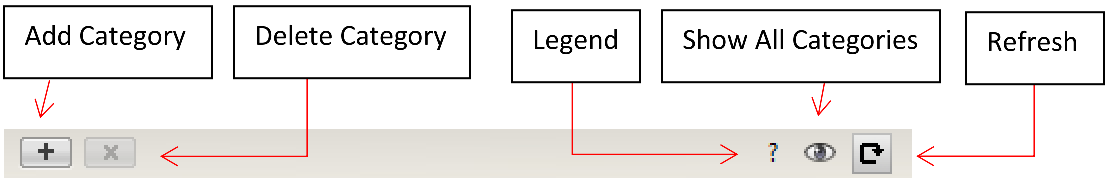
Select the template you want to edit. Edit the text in the text box. Click **Save** when complete.



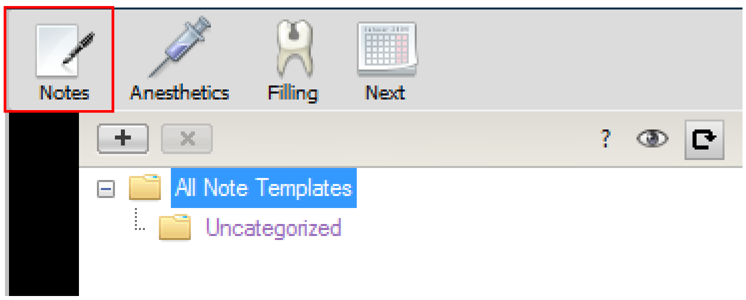
Notes

Creating a Category

Tool bar overview:

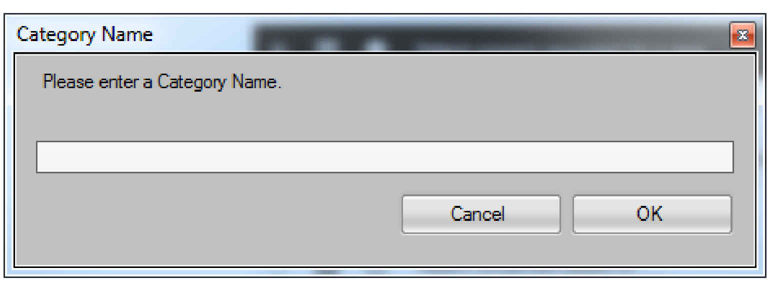


Click the **Notes tab** and select “All Note Templates”.

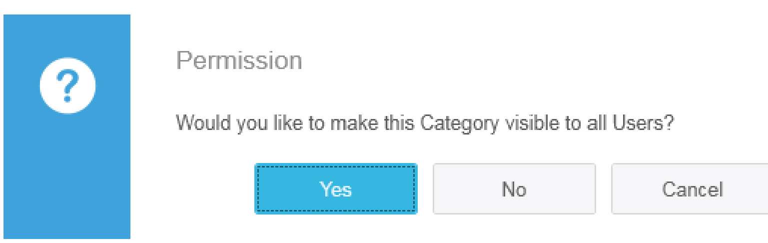


Click the **Add Category** button.

Enter your template Category Name. Click **OK** when complete.



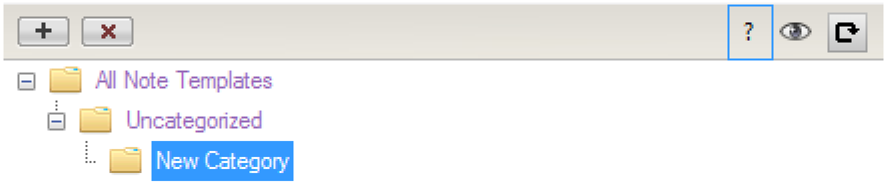
Click **Yes** if you would like this category to be visible to all users.



Notes

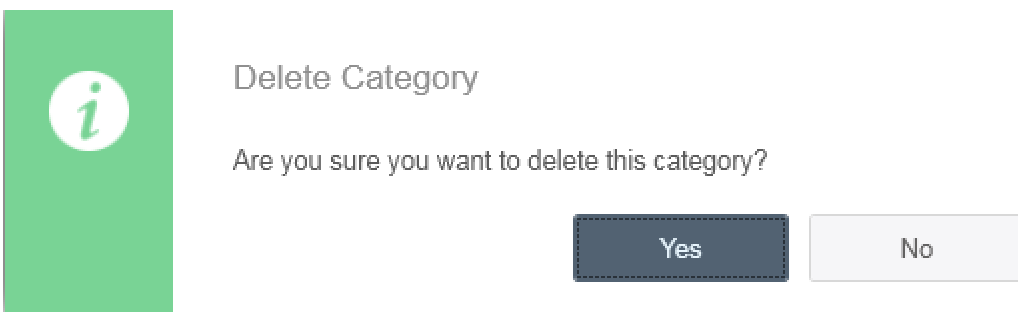
Deleting a Category

Select the category you want to delete.



Click the **Delete Category** button.

Click **Yes** to delete the category.



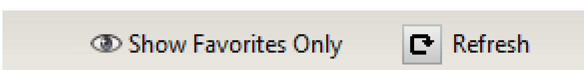
Notes

Adding Favourites

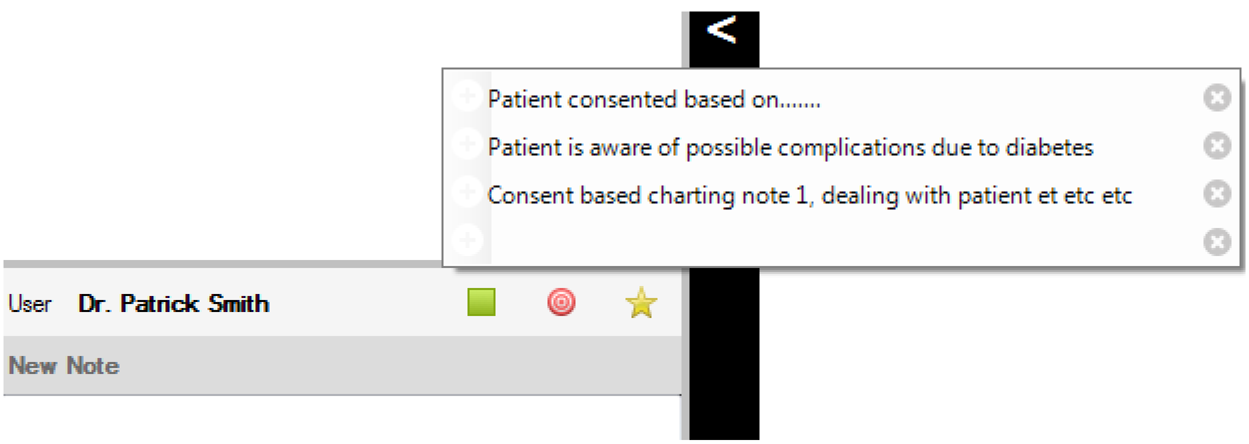
You can favourite any template by clicking on one of the three icons beside the template. These three icons can represent any category you wish. For example, the star can represent Surgical notes.

The icon will change from grey to colour once you favourite a template.

To view favourite templates only, click the **Show Favourites Only** button.



This is a quick way to use favourited template notes. Click on one of the favourite icons.



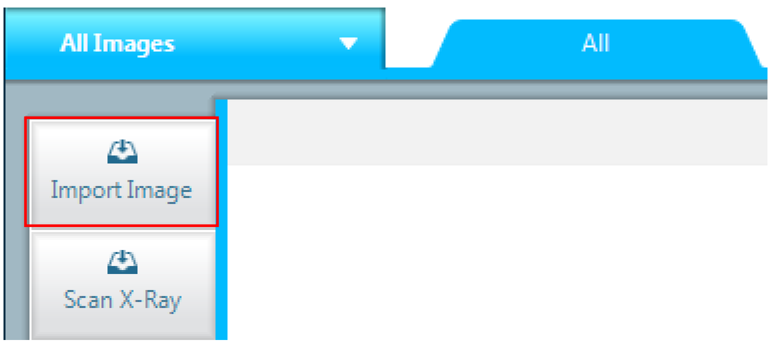
Images

Consult-PRO Images provides the user to import images into Consult-PRO. This can consist of X-Rays, clinical photos and much more.

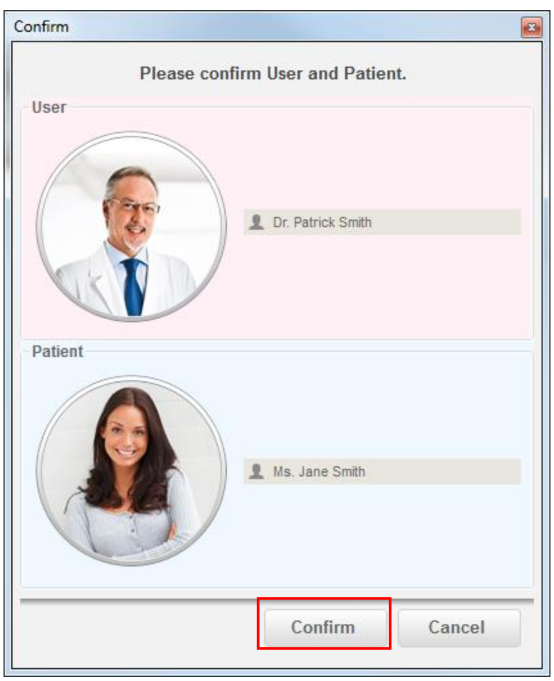
Login with a user and patient. Click the **Images** button.

Importing Images

Click **Import Image.**

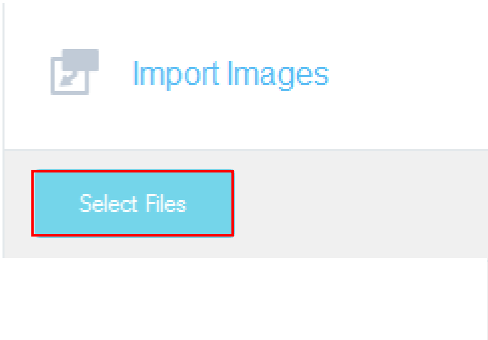


Confirm the User and Patient by clicking **Confirm.**



Images

Click **Select Files.** Select all the images you want to import for this patient.

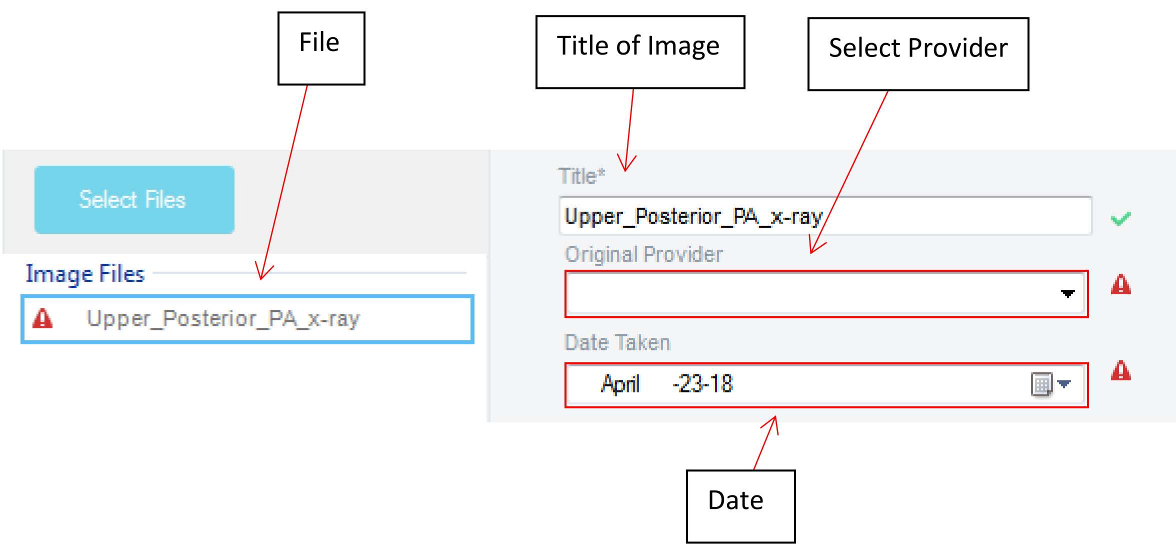


Set the title of the image. By default, the title of image is the file name. You can change this to a different name or keep it as its file name.

Choose the provider for the patient. Click the drop-down menu in **Select Provider** and select the provider for the patient.

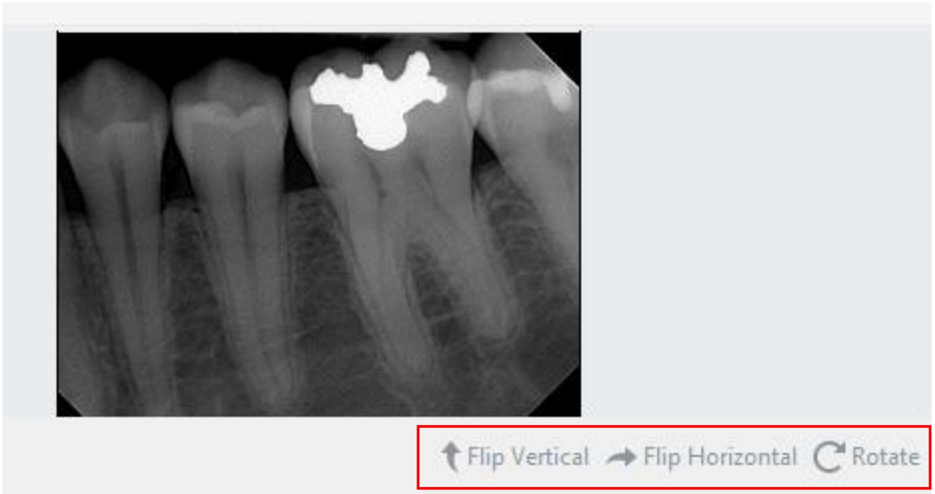
Change the date to the date the image was taken.

**Change filename

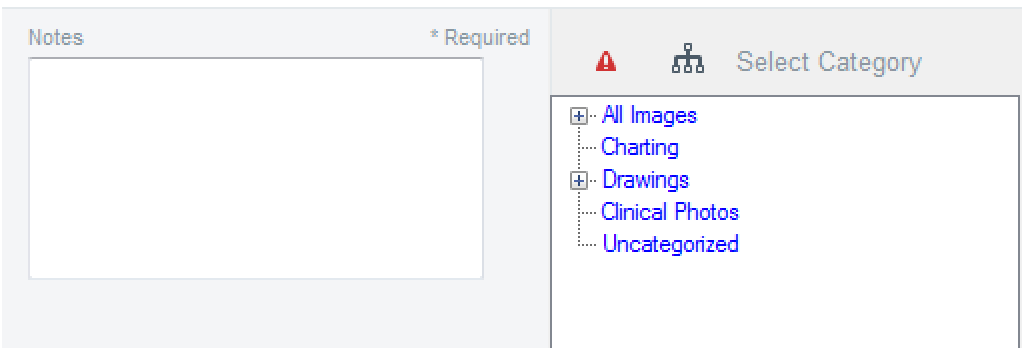


You can change the orientation of the image by using the **Flip Vertical**, **Flip Horizontal** and **Rotate** buttons.

Images



Add any notes you would like to attach to the image. Select a category you wish to import the image in.

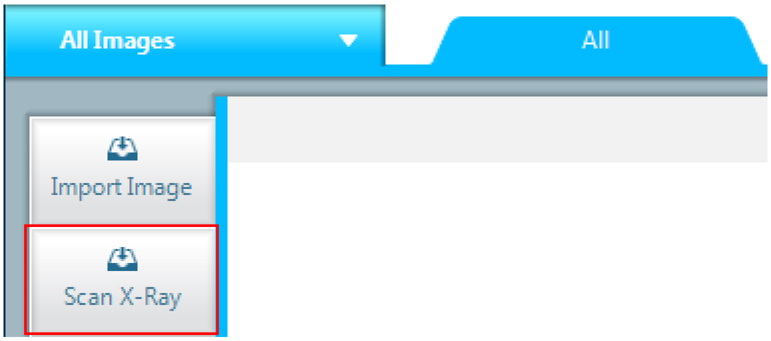


Click **Import Selected** if you wish to import a selected number of images. This is useful for when you want to import a selected number of images into a specific category. Click **Import All** if you wish to import all the images.

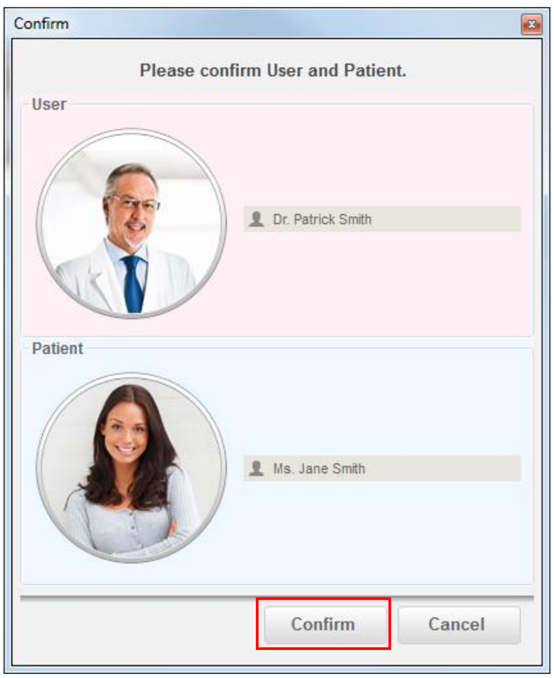
Images

Scan X-Ray

Click **Scan X-Ray**.



Confirm the User and Patient by clicking **Confirm.**



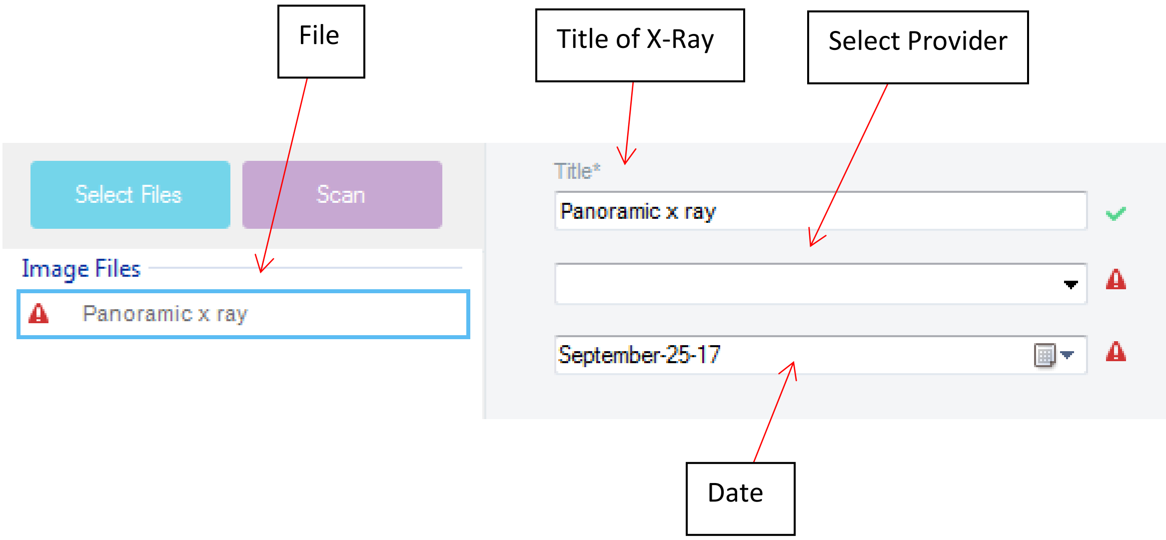
Click **Select Files.** Select all the X-rays you want to import for this patient.

Set the title of the image. By default, the title of image is the file name. You can change this to a different name or keep it as its file name.

Choose the provider for the patient. Click the drop-down menu in Select Provider and select the provider for the patient.

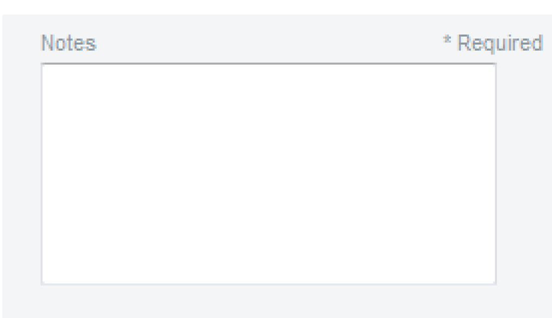
Images

Change the date to the date the image was taken.



You can change the orientation of the image by using the **Flip Vertical**, **Flip Horizontal** and **Rotate** buttons.

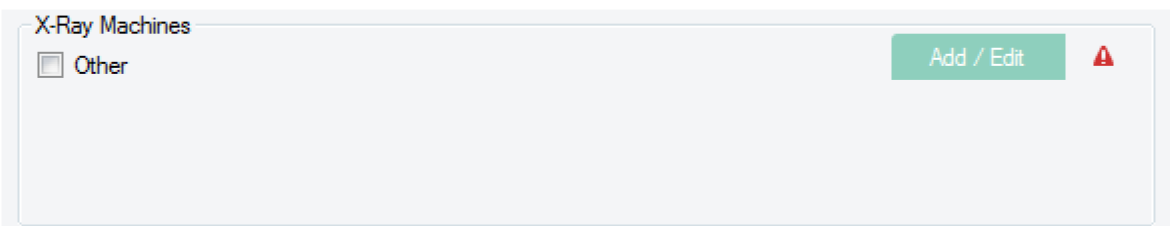
Add any notes you would like to attach to the image.



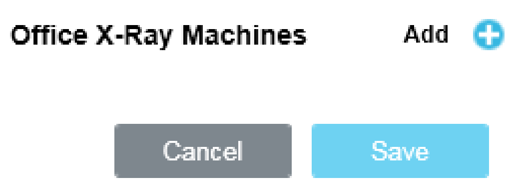
Images

Select the category pertaining to your patient's X-Ray.

You will be required to choose an X-Ray machine. You can now setup your X-Ray machines. Click **Add/Edit** to configure your X-Ray machines.

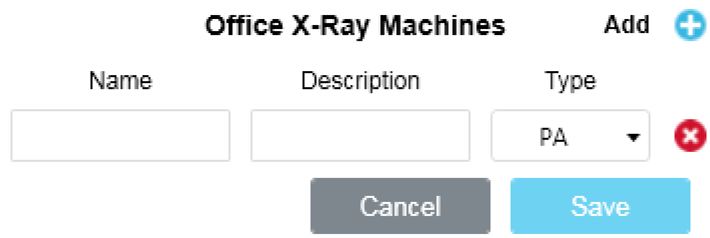


Click **Add** to add an office X-Ray machine.

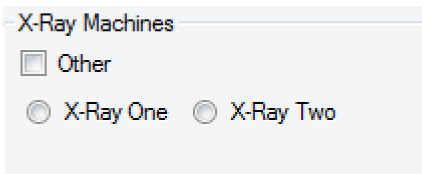


Enter a name and description for your X-Ray machine. Set the type of X-Ray machine. If you have multiple X-Ray machines, click **Add** to add another machine.

Images



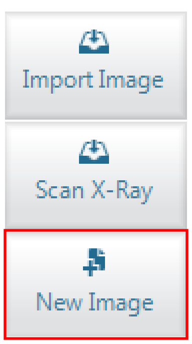
Select the X-Ray machine that took the X-Ray.



Click **Import Selected** if you wish to import a selected number of images. This is useful for when you want to import a selected number of images into a specific category. Click **Import All** if you wish to import all the images.

Creating a New Image

Click on **New Image**.



Enter your preferred **Page Setup**. You can manually change the width, height, and unit of measurement. You can also select from our pre-set sizes. Click **OK** when complete.

**Multiple Pages have not yet been implemented.

Images

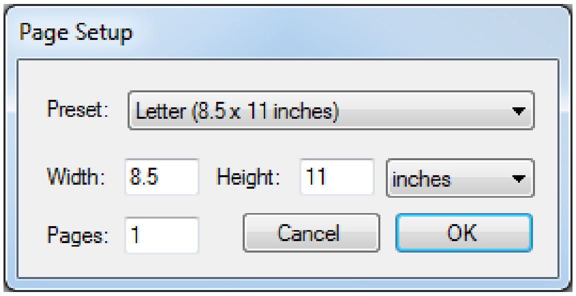


Image Tool Descriptions

New	Creates a new image
Background	Inserts a background image
Remove	Removes background image
	Allows you to draw on image
	Inserts ellipse
	Inserts rectangle
	Polygon tool
	Inserts Marquee rectangle or circle
	Inserts a line
	Inserts a textbox
	Adds image
	Inserts an arrow
Measure	Measuring tool
Teeth	Inserts teeth
Implant	Inserts implants
Crown	Inserts crowns

Images

Annotation	Insert annotation
Cosmetic	Insert cosmetic smiles over image.
Crop	Crops image
Rotate	Rotates background image by clicking and dragging.
Filter	Adjust Brightness, Contrast, Invert, Grayscale and Gamma of the image.
Delete	Delete selected item.
Send to Back	Moves selected item behind all other objects.
Bring to Front	Moves selected item in front of all other objects.
Foreground	Changes the foreground colour of text boxes, shapes and line.
2x	Changes the width of the border for shapes and line.
Background	Changes the background colour of text boxes and shapes.
	Increases or decreases the intensity of the colour.
75%	Predefined percentages for zooming in.
Zoom In	Zooms into the image.
Zoom Out	Zooms out of the image.
Rotate Left	Rotates image left

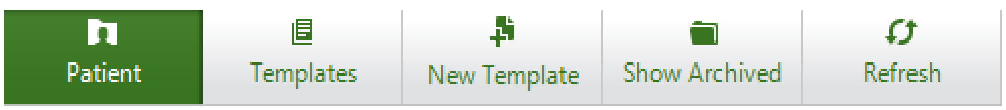
Images

Rotate Right	Rotates image right
Flip Horizontal	Flips the image horizontally.
Flip Vertical	Flips the image vertically.
Before/After	Shows before and after between edited and unedited images.

Refresh

If an image you imported is not displayed, click the **Refresh** button to refresh all images.

Layouts



Patient: Shows all user created templates for the patient.

Templates: Shows all default and custom templates.

New Template: Create a user created layout template.

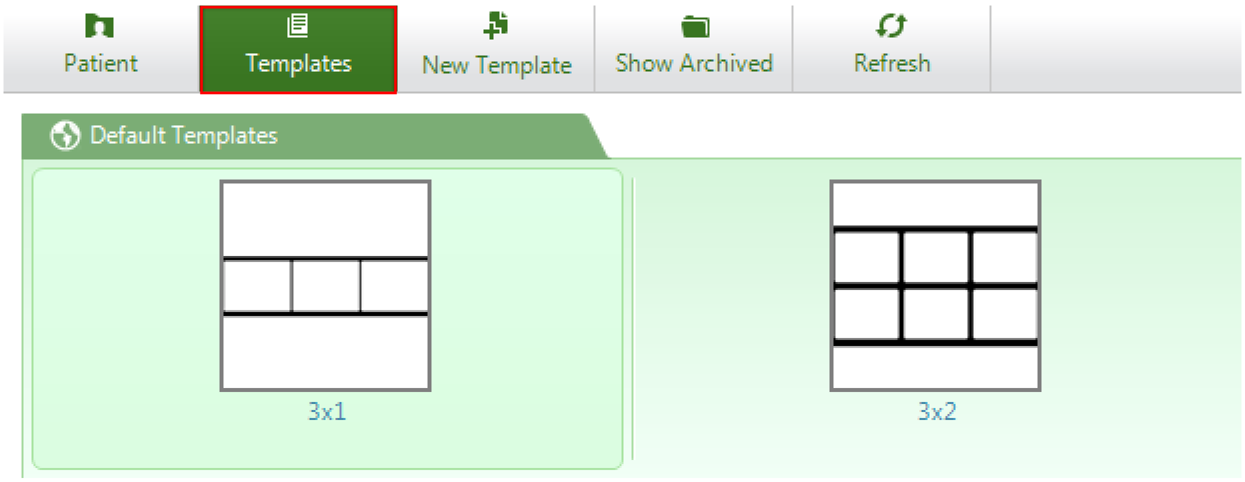
Show Archived: Show all templates that have been archived.

Refresh: If a layout you created is not displayed. Click the **Refresh** button to refresh all layouts.

Images

Creating a Layout

Click the **Templates** button. Double click on the preferred template you would like to use.

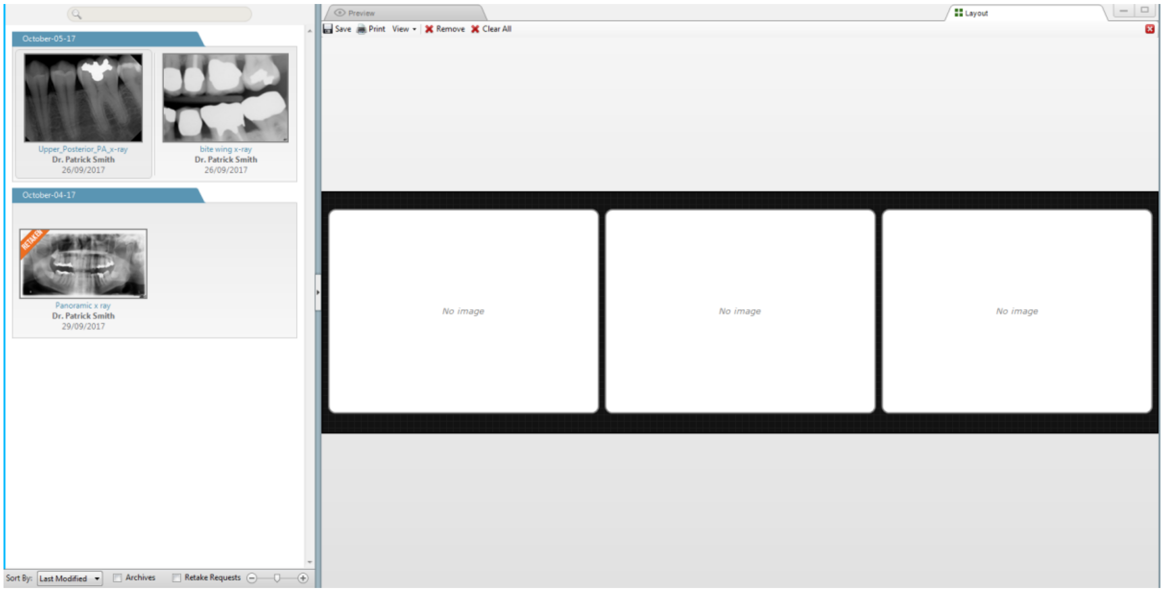


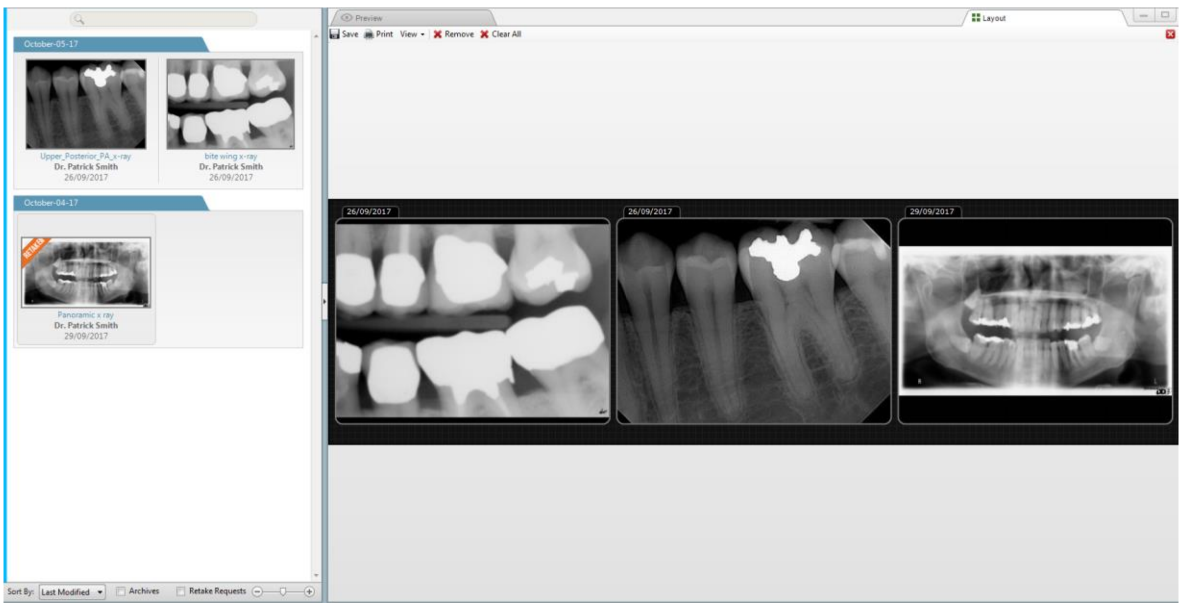
Drag and drop images from the left pane into the image boxes on the right. Use the Layout toolbar to perform functions on the image layout.

Layout Toolbar

Save	Click **Save,** enter a name and click okay to save as the patient's image layout.
Print	Prints the image layout in portrait or landscape.
View ▾	Select options from **Fit to Screen**, **Show Grid**, or change the header text.
Remove	Removes a selected image from the layout.
Clear All	Clear all images from the layout.

Images

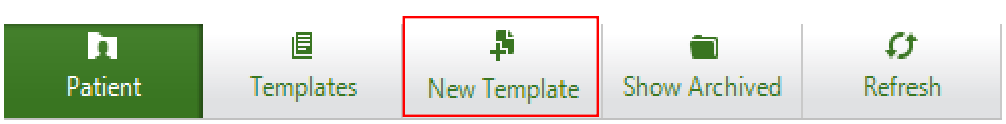




Click **Save** when complete. Enter a name for the layout and click **OK**.

Creating a New Template

Click the **New Template** button.

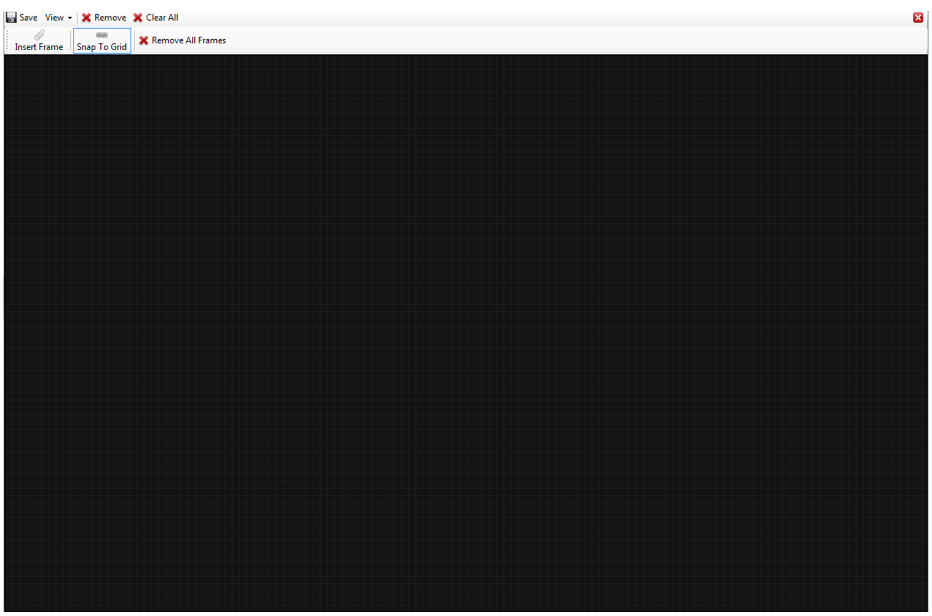


Use the Layout Toolbar to create a layout template.

Images

Image Layout Toolbar

Save	Click **Save,** enter a name and click okay to save as the patient's image layout.
Print	Prints the image layout in portrait or landscape.
View	Select options from **Fit to Screen**, **Show Grid**, or change the header text.
Remove	Removes a selected image from the layout.
Clear All	Clear all images from the layout.
Insert Frame	Inserts a photo frame. Frame can be resized and moved.
Snap To Grid	If the frames are within a couple pixels of each other, it will line up the frames on the same grid.
Remove All Frames	Removes all frames from layout.



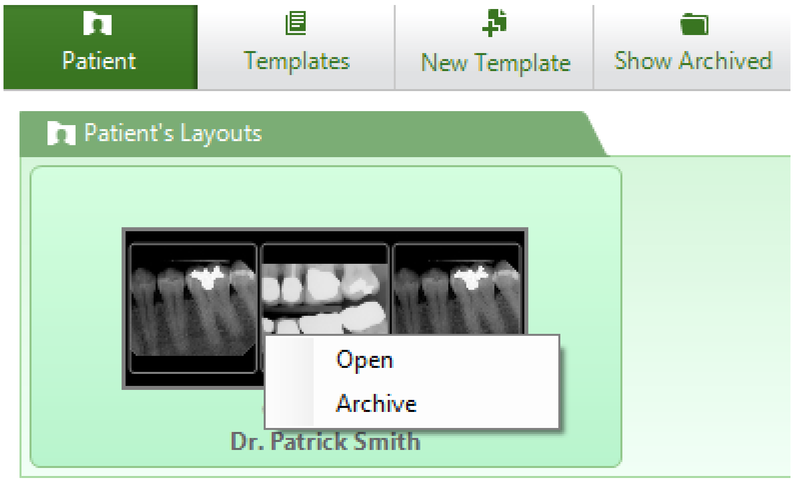
Click **Save** when complete. Enter a name for the template and click **OK**.

Images

**You can edit an existing template layout by right clicking the item and selecting edit template.

Archiving Patient Layouts and Templates

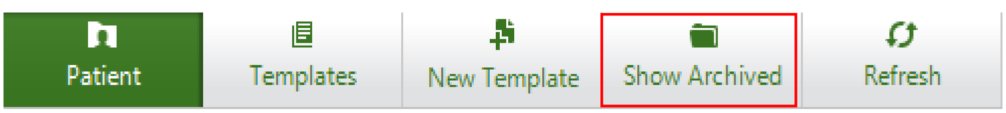
Right click the patient layout and select **Archive**.



Right click a custom template and select **Archive**.

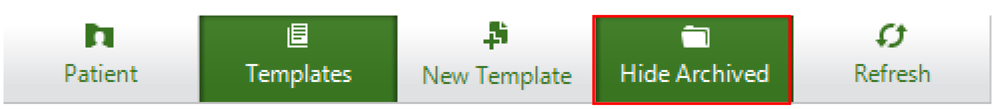
Showing Archived Items

Click **Show Archived.**



Click the **Patient** or **Templates** button. These views will now show archived items only.

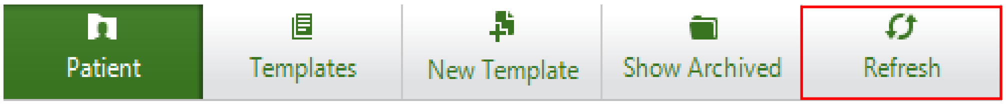
To exit the **Show Archived** view, click **Hide Archived**.



Images

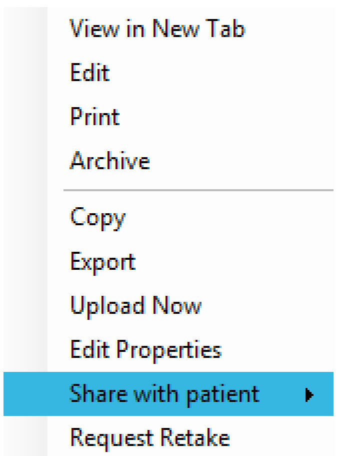
Refresh

If user created or default content is not displayed click the **Refresh** button.



Images Context Menu

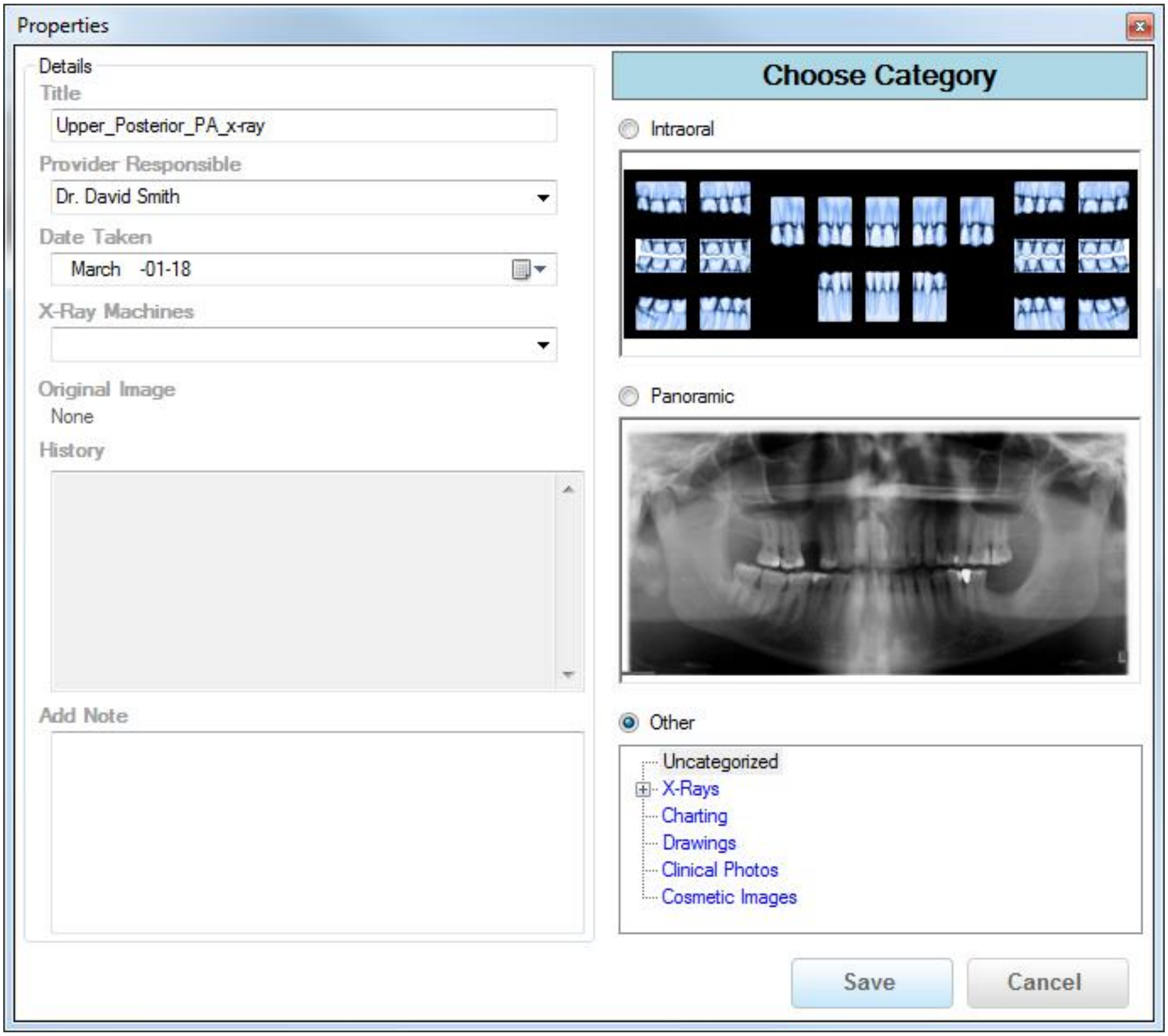
To access the context menu, right click your imported image.



View in New Tab: Opens image in new tab with limited tools.

Edit: Allows you to edit the imported image using the Image Tools.
Print: Prints the image in portrait or landscape.
Archive: Archives and removes the image. Archived images are never deleted permanently. They are only removed from active images.
Copy: Copies image to clipboard.
Export: Exports image to your computer.
Upload Now: Sets the image at the top of the queue to be uploaded to the server.
Edit Properties: Allows the user to change provider, date taken, X-ray machine and category. The user can also add additional notes.

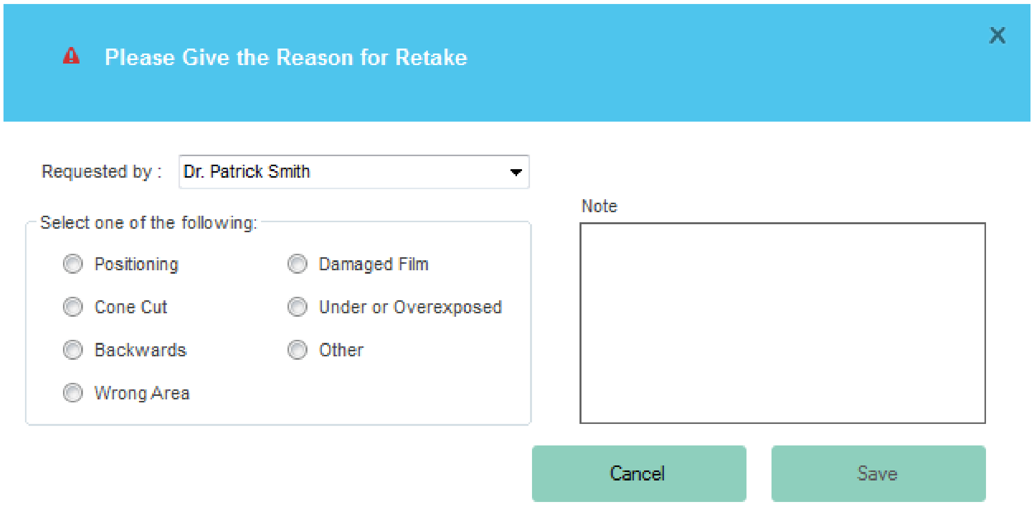
Images



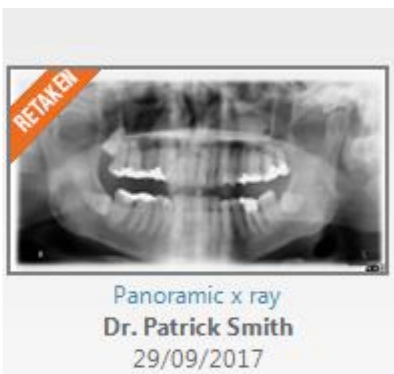
Share with Patient: Allows user to share image on **Connect**.

Request Retake: Select this option if you need to retake the X-Ray. Select one of the options and click **Save**.

Images

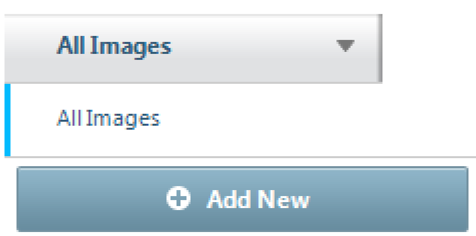


The image will be flagged with the Retaken banner indicating this X-Ray needs to be retaken.



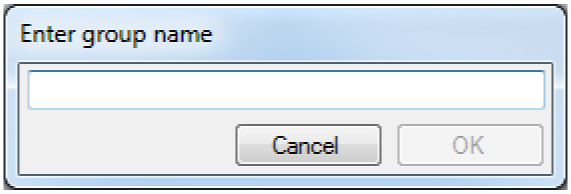
Creating a New Group

Expand the drop-down menu and click **Add New**.

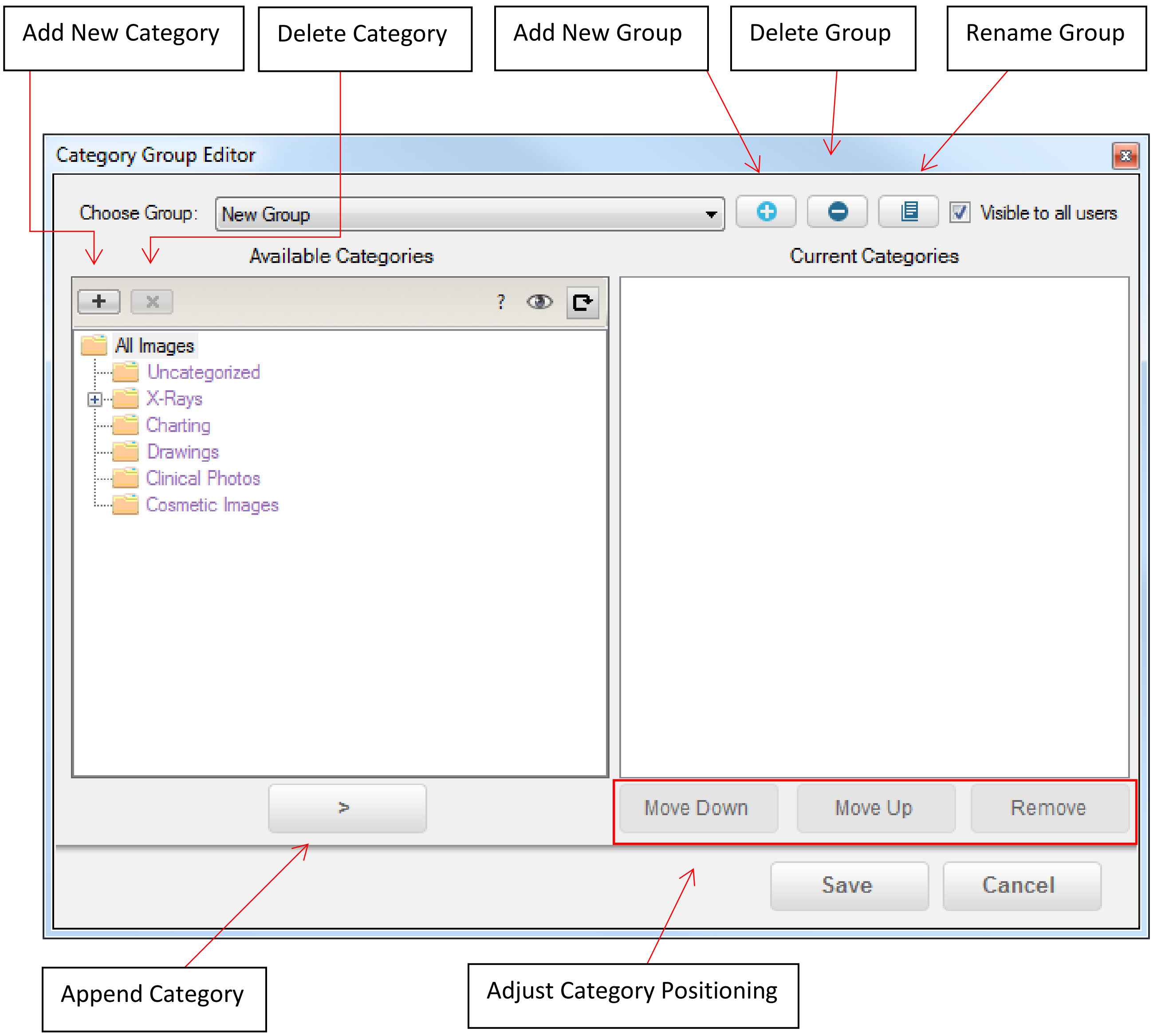


Enter a name for your new group. Click **OK** when complete.

Images



Category Group Editor Overview



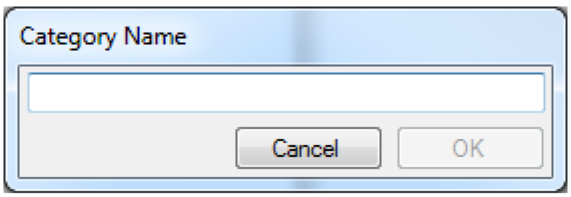
Images

Creating a New Category

If you want to create a new category, select "All Images" and click the **Add New Category** button.

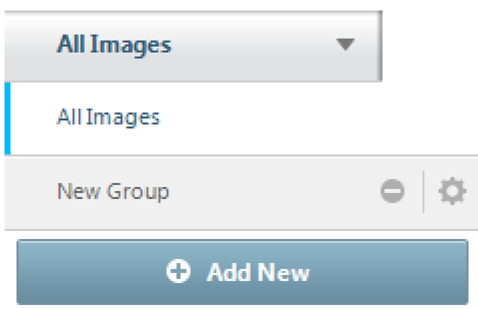
If you want to create a subcategory, select the folder you want to create the subcategory in. Click the **Add New Category** button.

Enter a category name and click **OK**.



Select the category you want to add to the group. Click the **Append Category** button. Click **Save** to finish creating your group.

You will now see your new group in the drop-down menu.

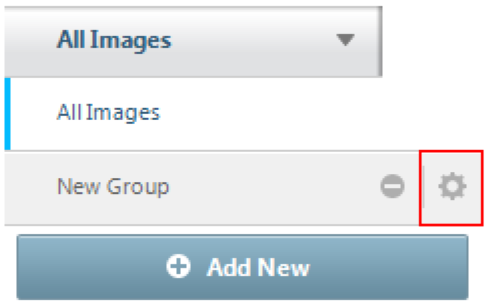


Images

Editing an Existing Group

Click the drop-down menu.

Click on the gear to open the Category Group Editor.

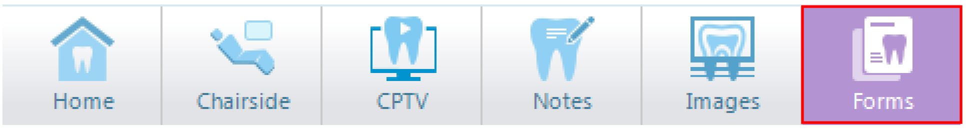


Use the tools from the Category Group Editor Overview to edit the group. Click **Save** to finish editing your group.

Forms

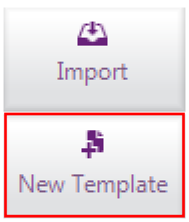
Consult-PRO Forms allow the user to create digital forms or use premade templates for their patients.

To begin using **Forms**, login with a user and patient. Click the **Forms** button.

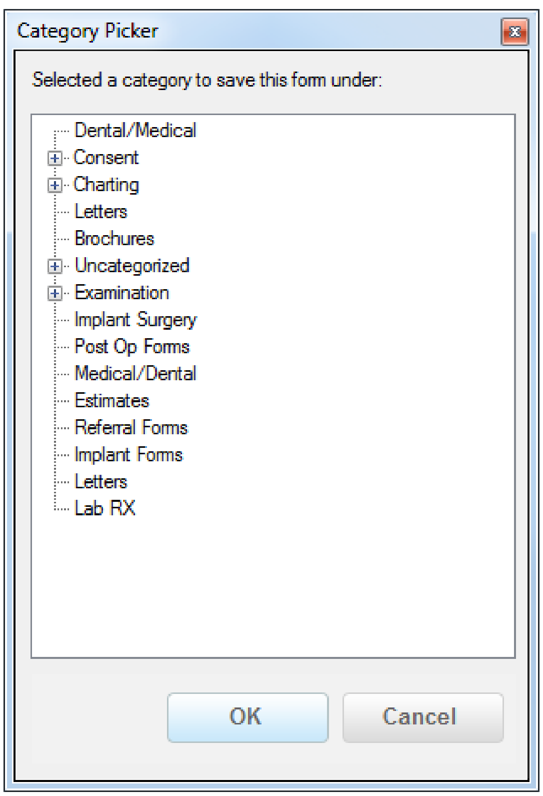


Creating a New Template

Click **New Template**.

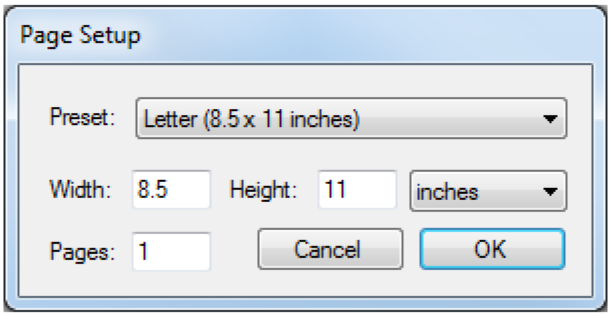


Select the category you want to put the form under and click **OK**.



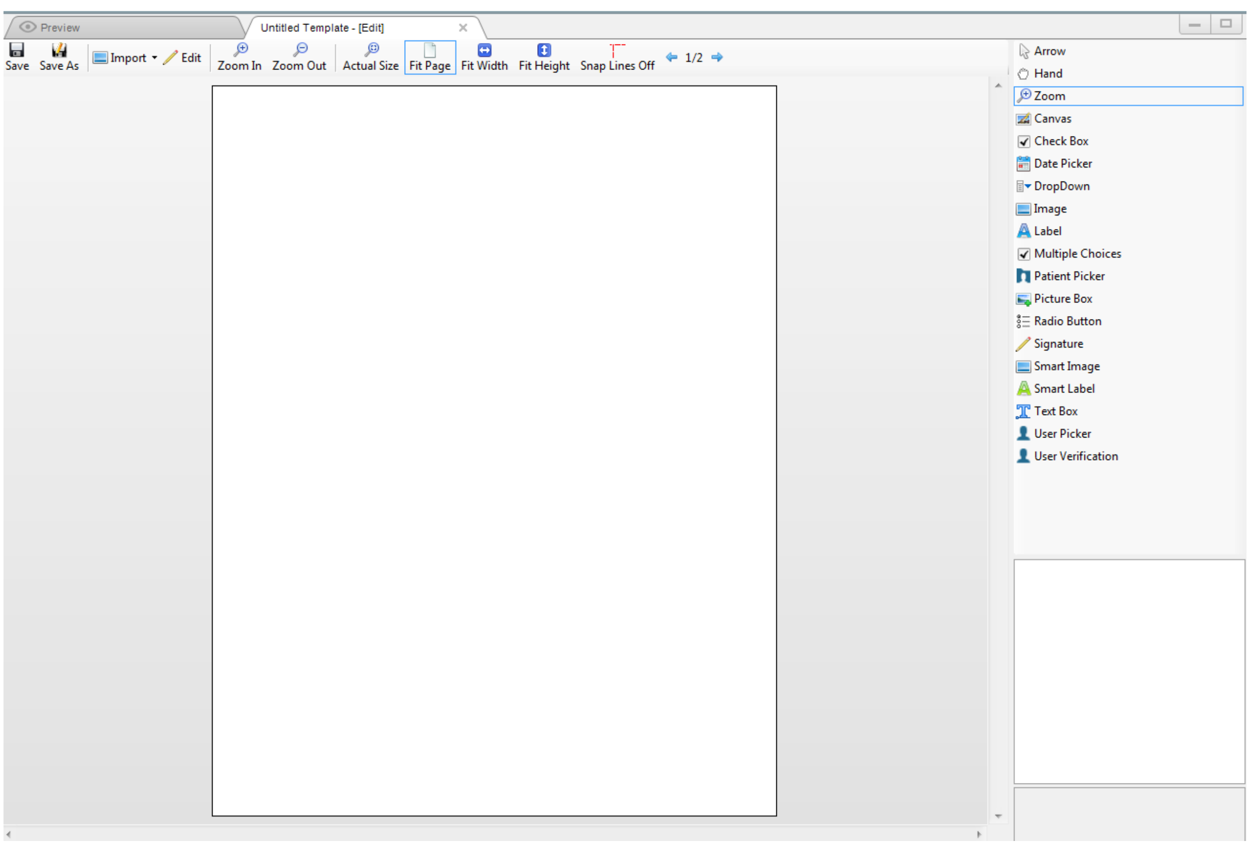
Forms

Enter your preferred **Page Setup**. You can manually change the width, height, and unit of measurement. You can also select from our pre-set sizes. Enter the number of pages you would like this form to be. Click **OK** when complete.



You'll be taken to the **Form Creator** window. Use the tools on the right-hand side to overlay functionality into your form. If you wish to create a form from scratch, simply use the tools on the right-hand side of the screen. If you wish to build a form based off an existing form in your office, scan or load that form into your computer as a jpeg image. Click the **Import** button on the top of the toolbar to import your form.

Form Creator Overview:



Forms

Forms Tools Descriptions

Page Setup Tool Descriptions

Save	Saves changes you have made to the form.
Save As	Prompts the user to save the form as a new name.
Import	Imports background image from your computer or clipboard.
Edit	Allows you to edit the background image using Image Tools.
Zoom In	Zooms into the image.
Zoom Out	Zooms out of the image.
Actual Size	Resizes canvas to the actual dimensions of the page setup.
Fit Page	Inserts Marquee rectangle or circle.
Fit Width	Resizes canvas to fit the width of the entire window.
Fit Height	Resizes canvas to fit the height of the entire window.
Snap Lines Off	Click this button to turn on snap lines. Snap lines help align objects with vertical and horizontal guidelines snapping the object into place.
1/4	Switch template pages.

Forms

Tool Strip Descriptions

Arrow	Select this tool to cancel other tool selections.
Hand	Select this tool to cancel other tool selections.
Zoom	Zooms into a specific part of the image.
Canvas	Inserts a canvas that only allows mouse input.
Check Box	Inserts a checkbox with multiple styles.
Date Picker	Inserts a date picker that allows you to choose any date.
DropDown	Inserts a drop-down menu with user edited items. You can edit items by right clicking the drop-down menu.
Image	Inserts an image you choose from your PC. This image will permanently be part of the form template.
Label	Inserts a textbox that can't be changed when filling out.
Multiple Choices	Inserts a multiple-choice table that can be styled for multiple choice, true or false and yes or no options.
Patient Picker	Inserts a patient picker that allows the user to choose a patient.
Picture Box	Inserts a picture box. Click the box to load an image when filling out the form.
Radio Button	Insert radio buttons for the patient to choose. Right click the item to add items to the radio buttons.
Signature	Inserts a signature box for the patient to sign.
Smart Image	Inserts an automatically generated image based from organization logo, office logo, user portrait, treatment image or patient portrait. Options can be chosen by right clicking the image and selecting the preferred option.
Smart Label	Inserts an automatically generated label based on the selection of various choices.

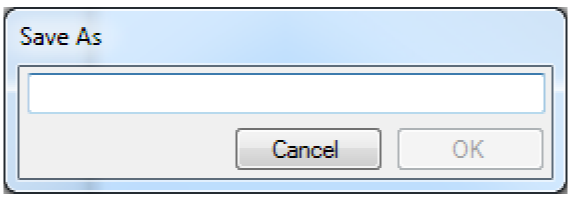
Forms

Text Box	Inserts a box which accepts user input.
User Picker	Inserts a user picker that allows you to choose a user from manage users.
User Verification	Inserts a user verification that prompts the user to enter their login credentials to verify.

All Tool Strip tools can be placed on the page by double clicking or drag and dropping the tool on the page.

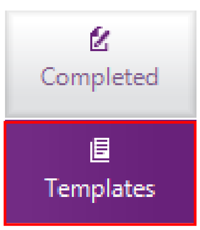
Click **Save** when complete.

Enter a name for the template. Click **OK** when complete.



Editing an Existing Template

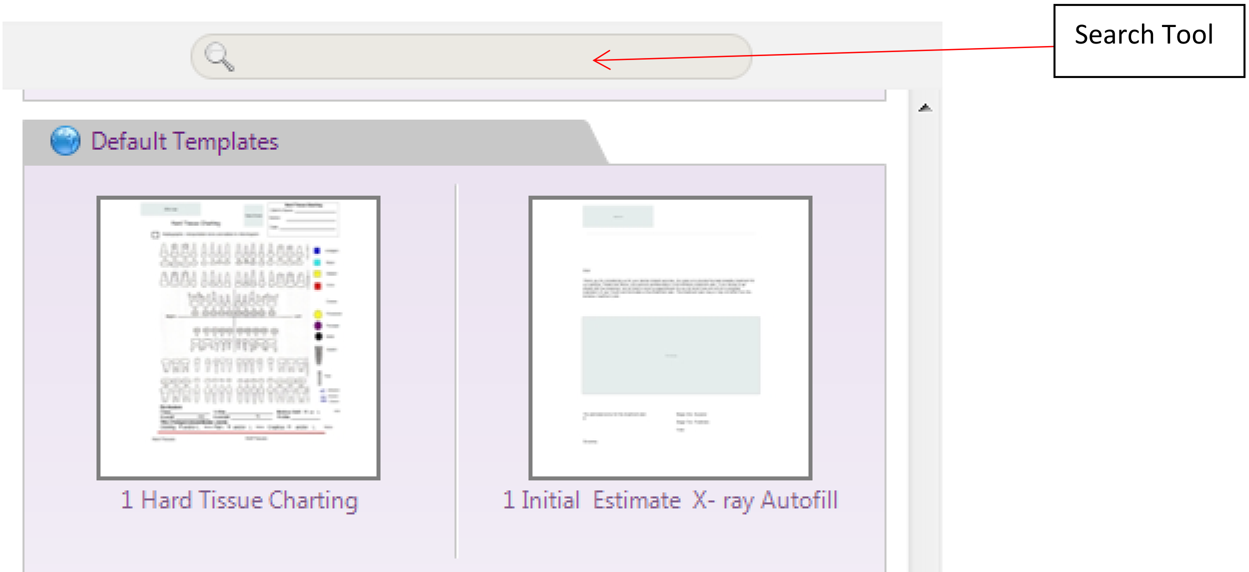
Click the **Templates** button.



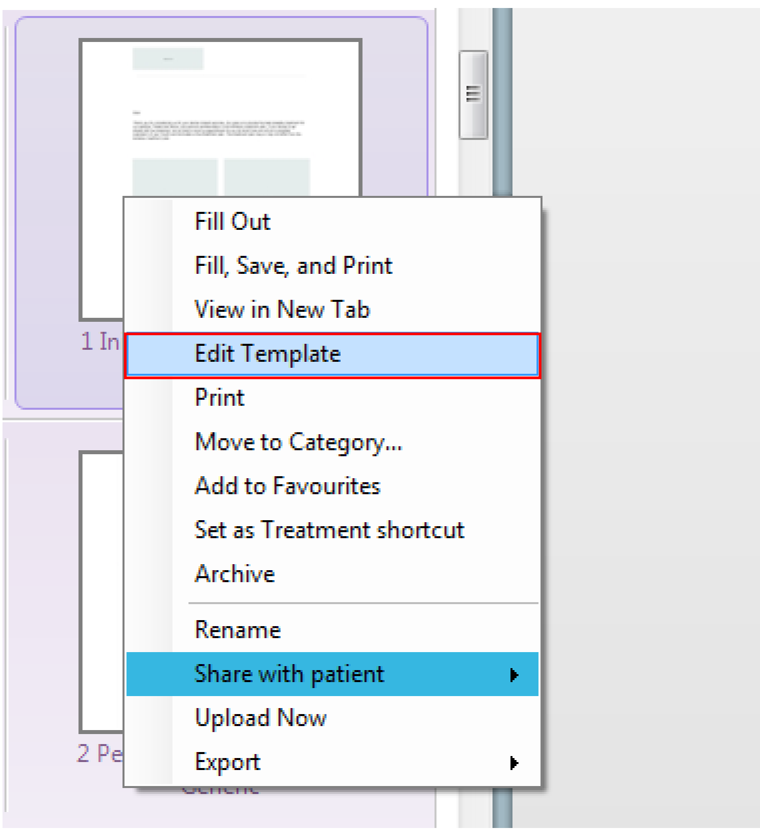
Click the category tab the template resides in, or select “All”.

Scroll through the category and locate the template you want to edit. You may use the **Search** tool if you know what the name of the template is called.

Forms



Right click the template and select **Edit Template**.

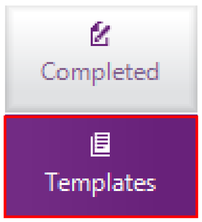


Use the Forms Tools to edit your template. Click **Save** to save your changes.

Forms

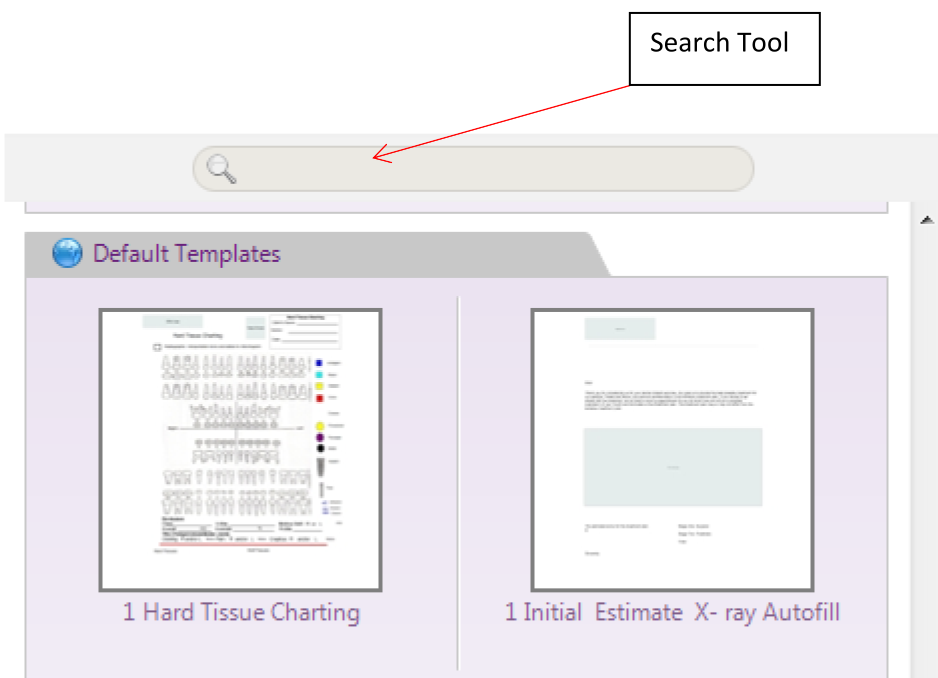
Filling Out Forms

Click the **Templates** button.



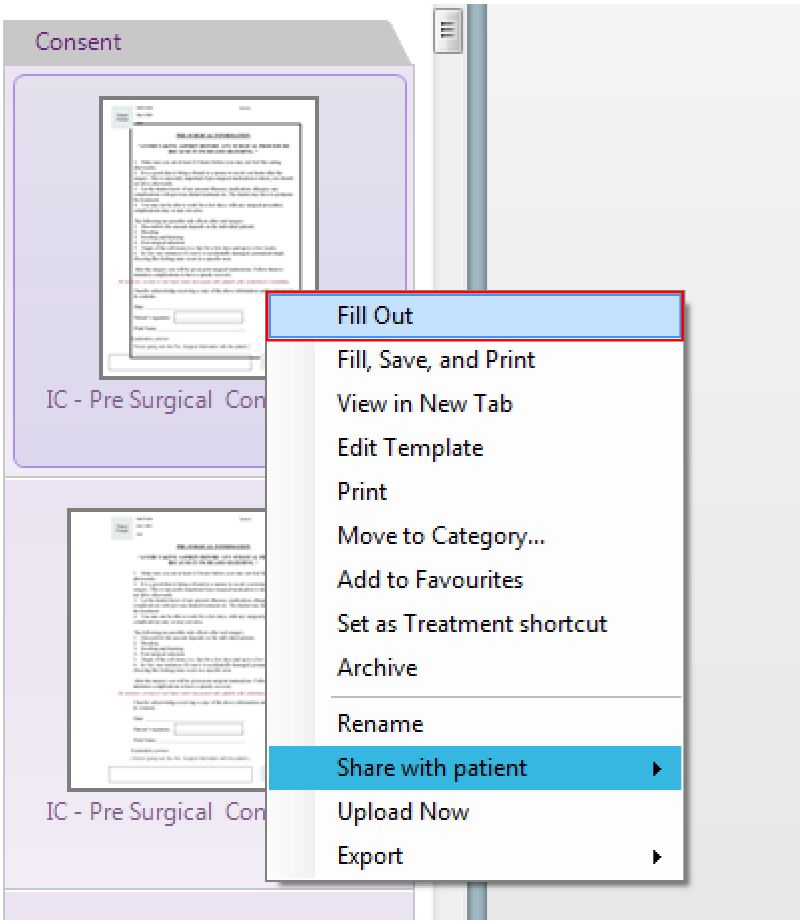
Click the category tab the template resides in or select “All”.

Scroll through the category and locate the template you want to fill out. You may use the **Search** tool if you know what the name of the template is called.

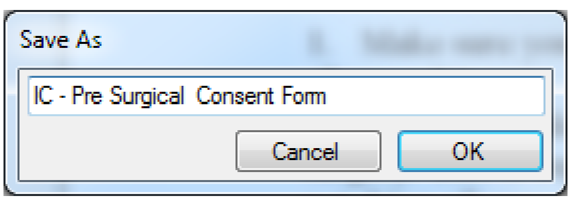


Right click the template and select **Fill Out**.

Forms

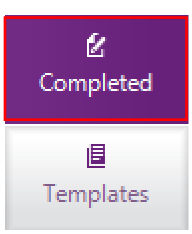


Have the patient and doctor complete the form. After completing the form, click **Save**.



By default, the name of the completed form is the name of the template. You can change the name of the completed form by entering your own title in the text box. Click **OK** when complete.

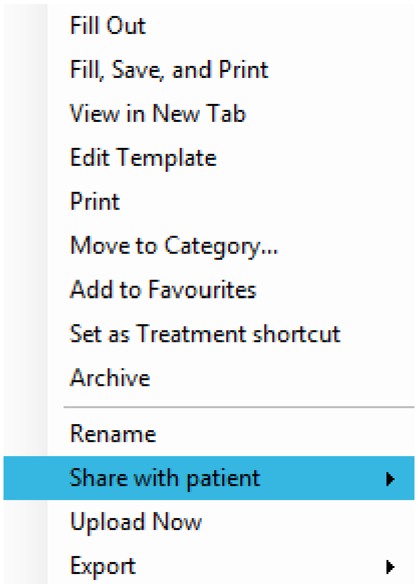
All filled out forms for the patient can be found in Completed.



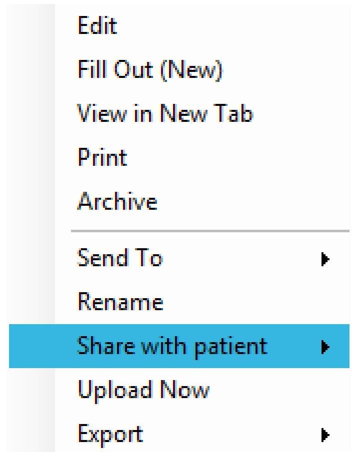
Forms

Forms Context Menu

Templates Context Menu



Completed Forms Context Menu



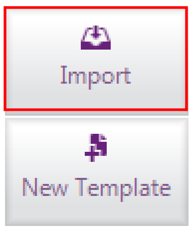
Fill Out: Fills out a form.
Fill Out (New): Fills out a new form with the existing template.
Fill, Save and Print: Fills out, saves and prints the template.
View in New Tab: Opens template in new tab.
Edit Template: Edits the existing template.
Print: Prints out the template.
Move to Category…: Move template to a different category.
Add to Favourites: Adds template as a favourite.
Set as Treatment shortcut: Sets the form to be usable in Treatment Planning.
Archive: Archives the template.
Rename: Renames the template.
Share with patient: Shares template with Connect user.
Upload Now: Sets the form at the top of the queue to be uploaded to the server.
Export: Exports to clipboard, template or Images.
Edit: Allows the user to edit a completed form.
Send To: Ability to send completed form to Images or another patient.
Rename: Renames the completed form.
Share with patient: Shares completed form with Connect user.

Forms

Import Forms

After exporting forms as a template, you can import them into the software. This is only useful for sharing your forms with other Consult-PRO users in different organizations.

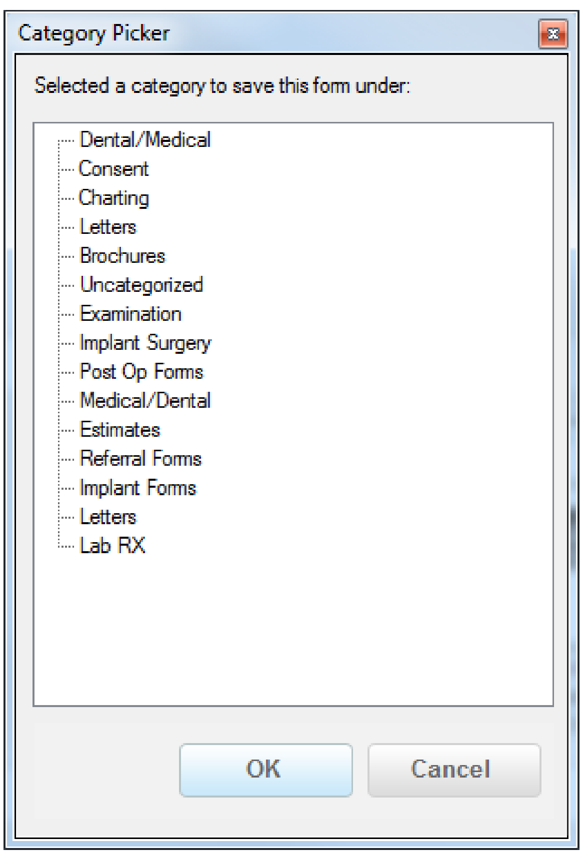
Click the **Import** button.



Windows Explorer will launch. Locate and select the form you wish to import.

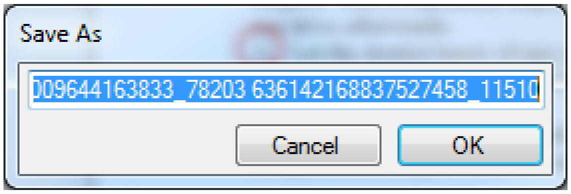
Select the category you wish to import it into.

Click **OK** when complete.



Forms

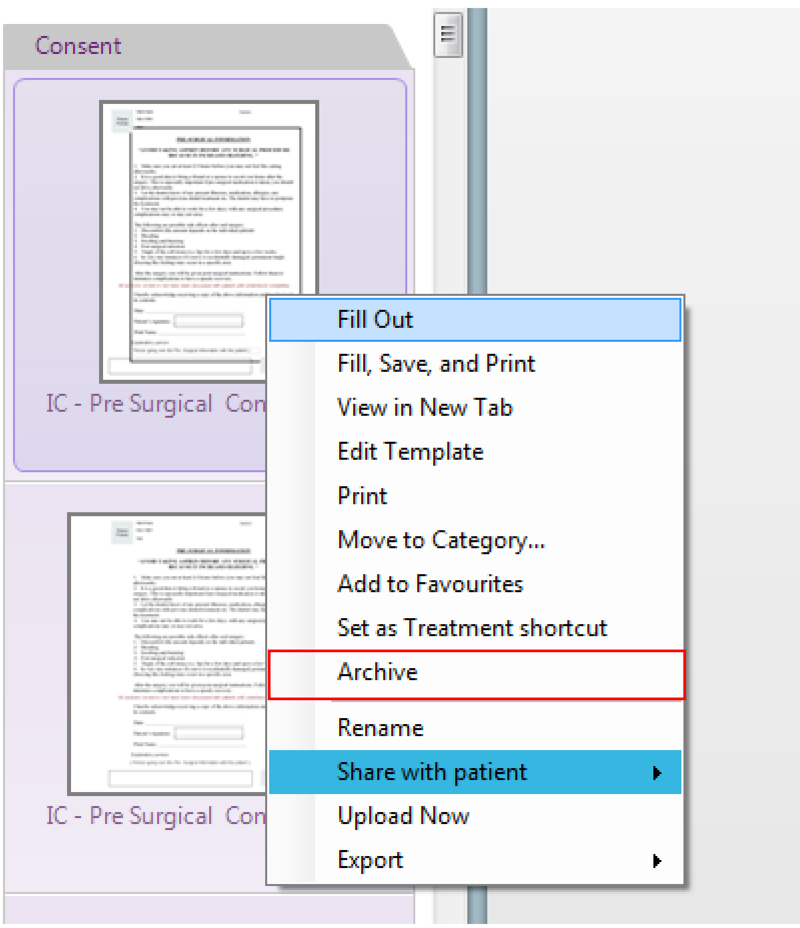
The Form Creator will now appear with your template imported. You may use the Forms tools to edit the form. Click **Save** when complete.



By default, the name of the form is the name of the original template. You can change the name of the completed form by entering your own title in the text box. Click **OK** when complete.

Archiving Forms

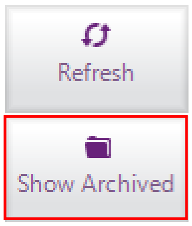
Right click the form and select **Archive**.



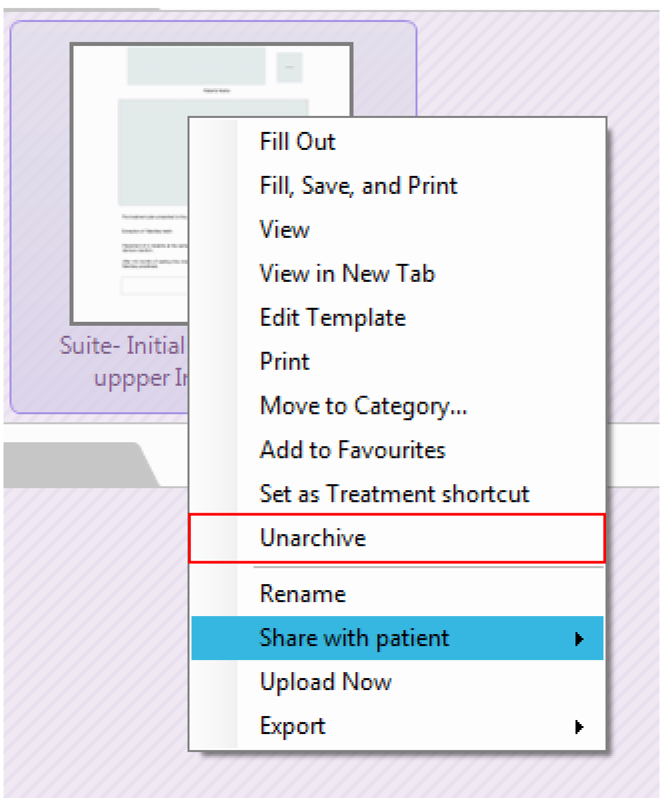
Forms

Unarchiving Forms

Click **Show Archived**.



Right click the form and select **Unarchive**.

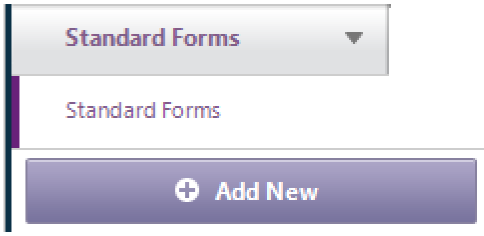


The form will now be unarchived and sent back to its original location.

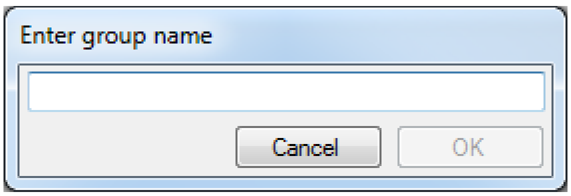
Creating a New Group

Expand the drop-down menu and click **Add New**.

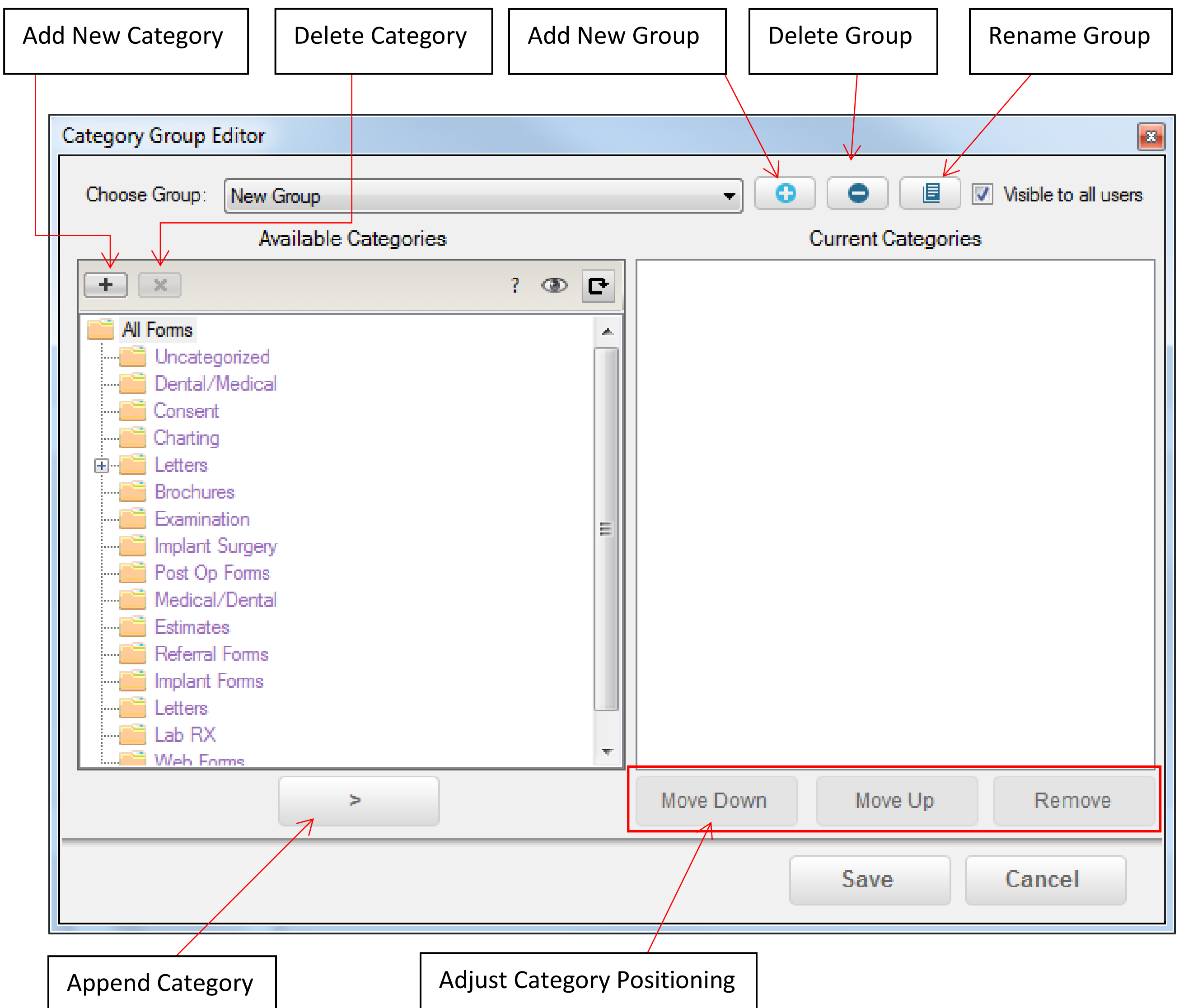
Forms



Enter a name for your new group. Click **OK** when complete.



Category Group Editor Overview



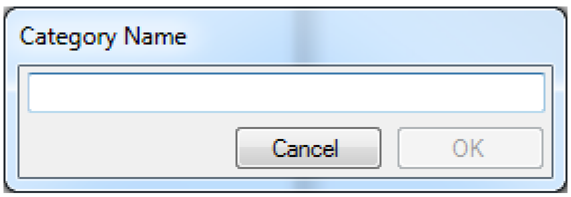
Forms

Creating a New Category

If you want to create a new category, select “All Forms” and click the **Add New Category** button.

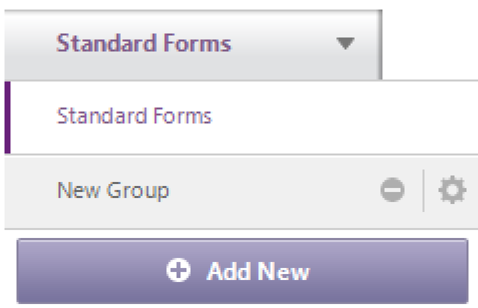
If you want to create a subcategory, select the folder you want to create the subcategory in. Click the **Add New Category** button.

Enter a category name and click **OK**.



Select the category you want to add to the group. Click the **Append Category** button. Click **Save** to finish creating your group.

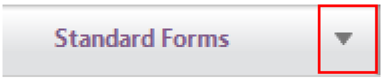
You will now see your new group in the drop-down menu.



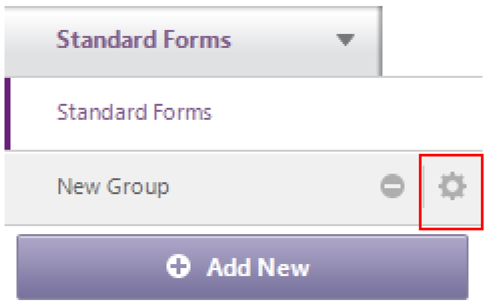
Forms

Editing an Existing Group

Click the drop-down menu.



Click the gear to open the Category Group Editor.



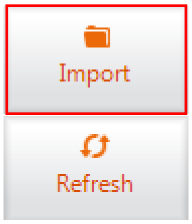
Use the tools from the Category Group Editor Overview to edit the group. Click **Save** to finish editing your group.

Documents

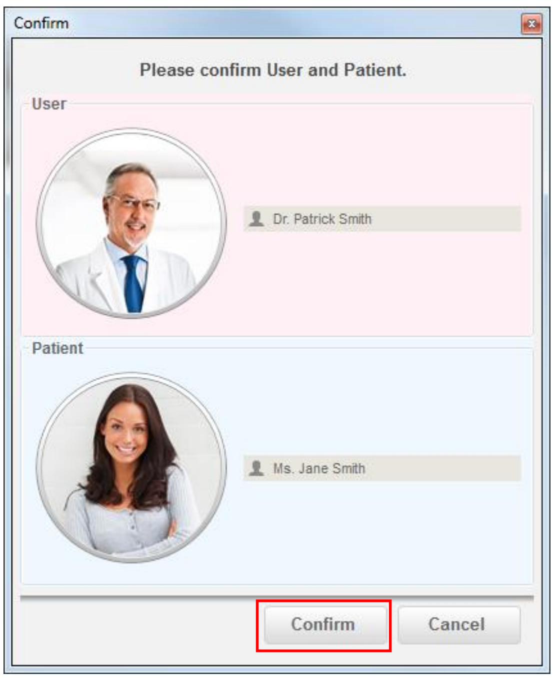
Consult-PRO Documents allows the user to import popular document types into Consult-PRO.

Importing Documents

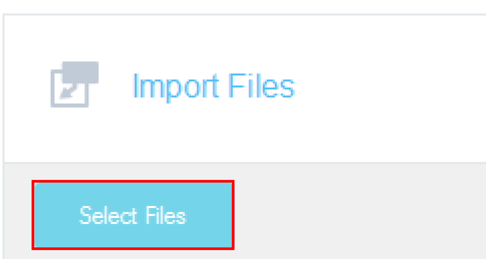
Click the **Import** button.



Confirm the User and Patient by clicking **Confirm.**



Click **Select Files.** Select all the images you want to import for this patient.

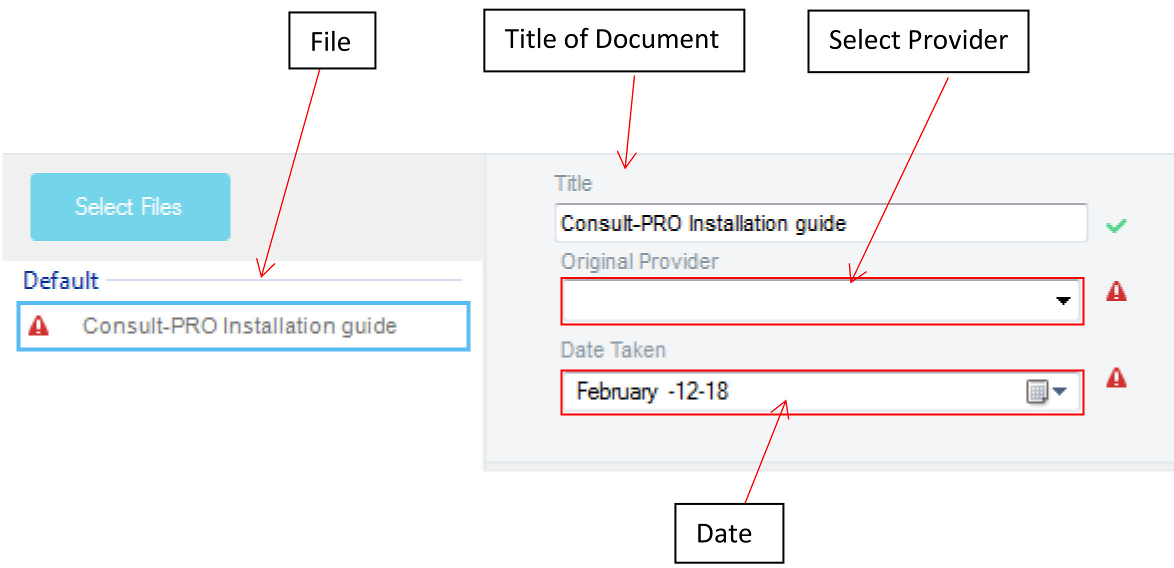


Documents

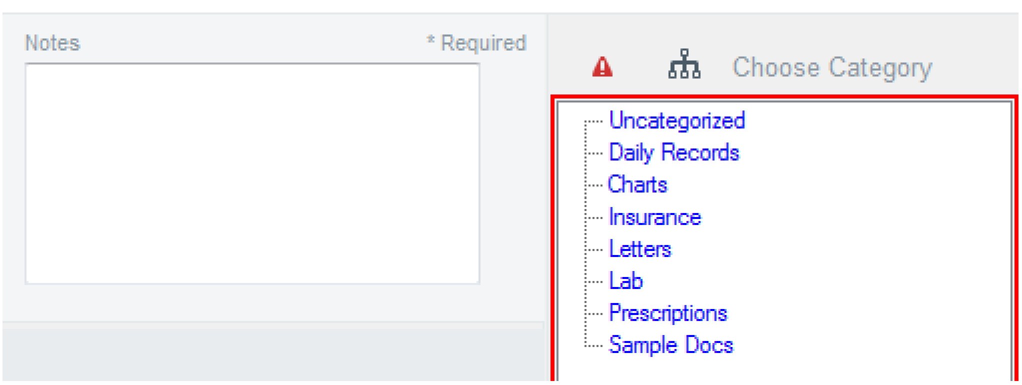
Set the title of the document. By default, the title of the document is the file name. You can change this to a different name or keep it as its file name.

Choose the provider for the patient. Click the drop-down menu in Select Provider and select the provider for the patient.

Change the date to the date the image was taken.



Add any notes you would like to attach to the document. Select a category you wish to import the document in.

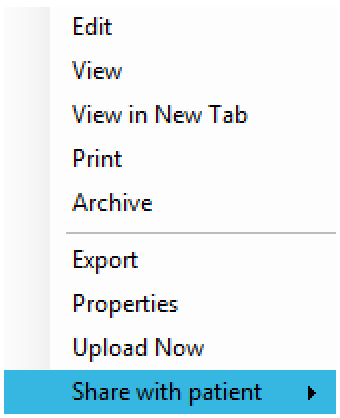


Documents

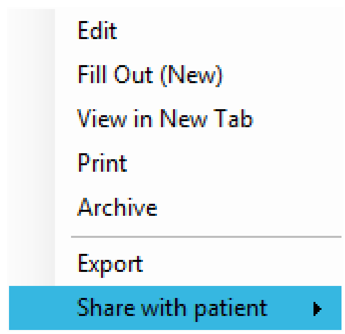
Click **Import Selected** if you wish to import a selected number of documents. This is useful for when you want to import a selected number of documents into a specific category. Click **Import All** if you wish to import all the images.

Documents Context Menu

Doc Types and Images Context Menu



Forms Context Menu



**Doc types consist of PDF, DOCX, XLSX, PPTX

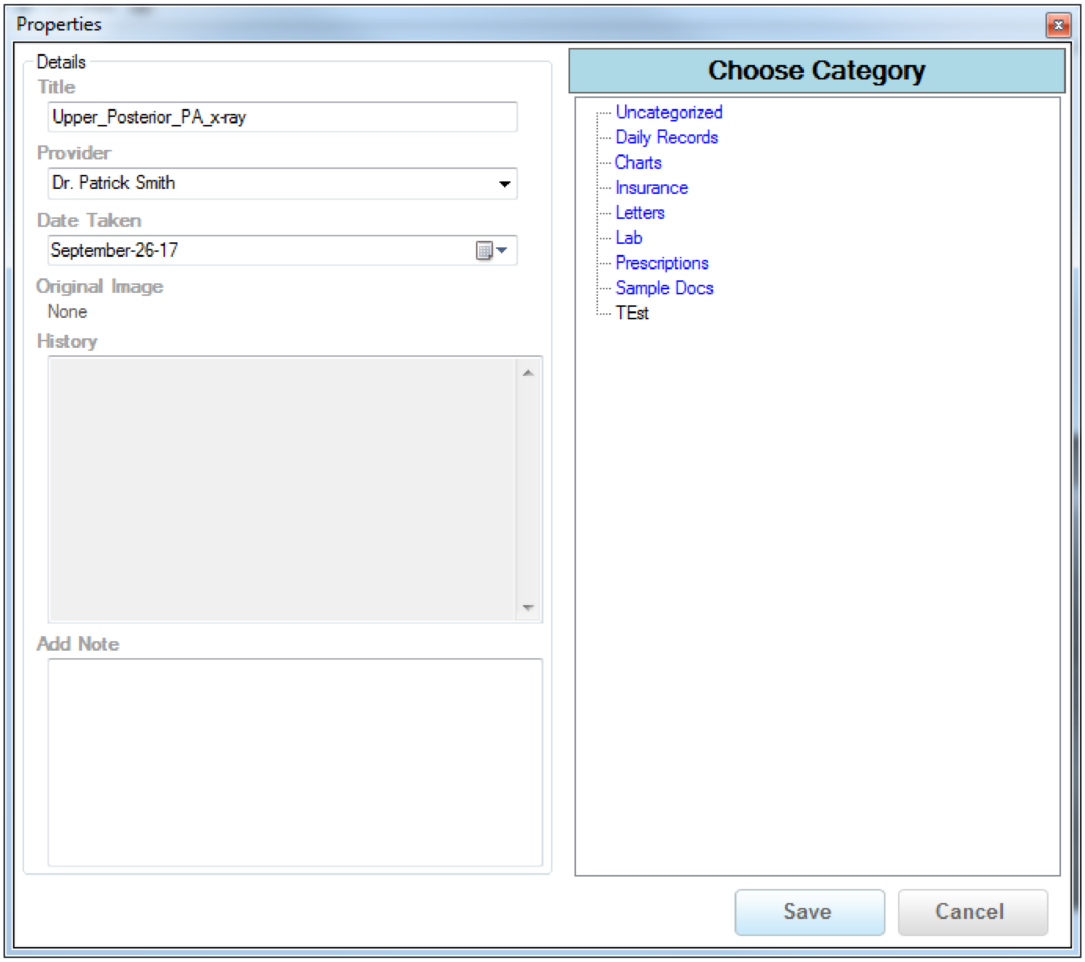
To access the context menu, right click the document.

View in New Tab: Opens images and forms in a new tab with limited tools.

Edit: Allows you to edit imported images and forms.
Fill Out (New): Fills out a new form with the existing form.
Print: Prints the image in portrait or landscape.
Archive: Archives and removes the image. Archived images are never deleted permanently. They are only removed from active images.
Export: Exports document to your computer.
Upload Now: Sets the document at the top of the queue to be uploaded to the server.

Documents

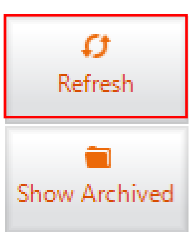
Properties: Allows the user to change provider, date taken, X-ray machine and category. The user can also add additional notes.



Share with Patient: Allows user to share documents on **Connect**.

Refresh

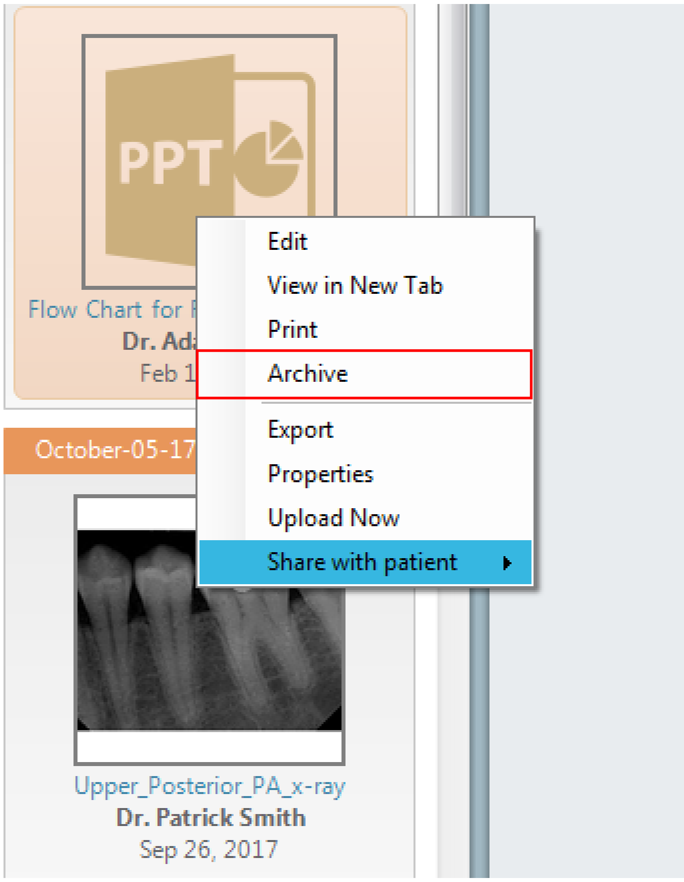
Click **Refresh** if you do not see recently imported documents.



Documents

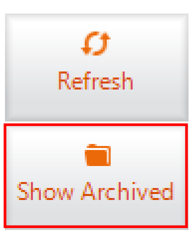
Archiving Documents

Right click the document and select **Archive**.



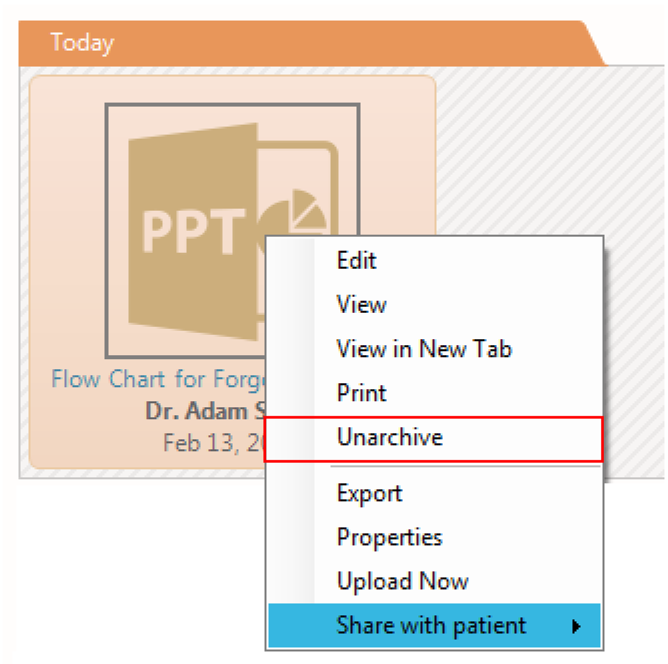
Unarchiving Documents

Click the **Show Archived** button.



Right click the document and select **Unarchive**.

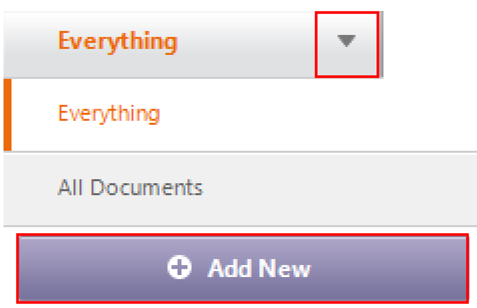
Documents



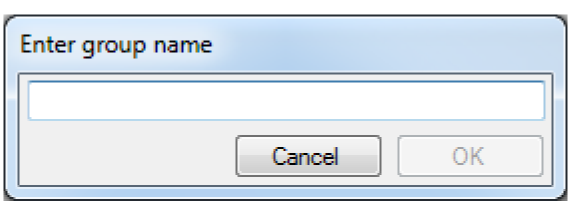
The document will now be unarchived and sent back to its original location.

Creating a New Group

Expand the drop-down menu and click **Add New**.

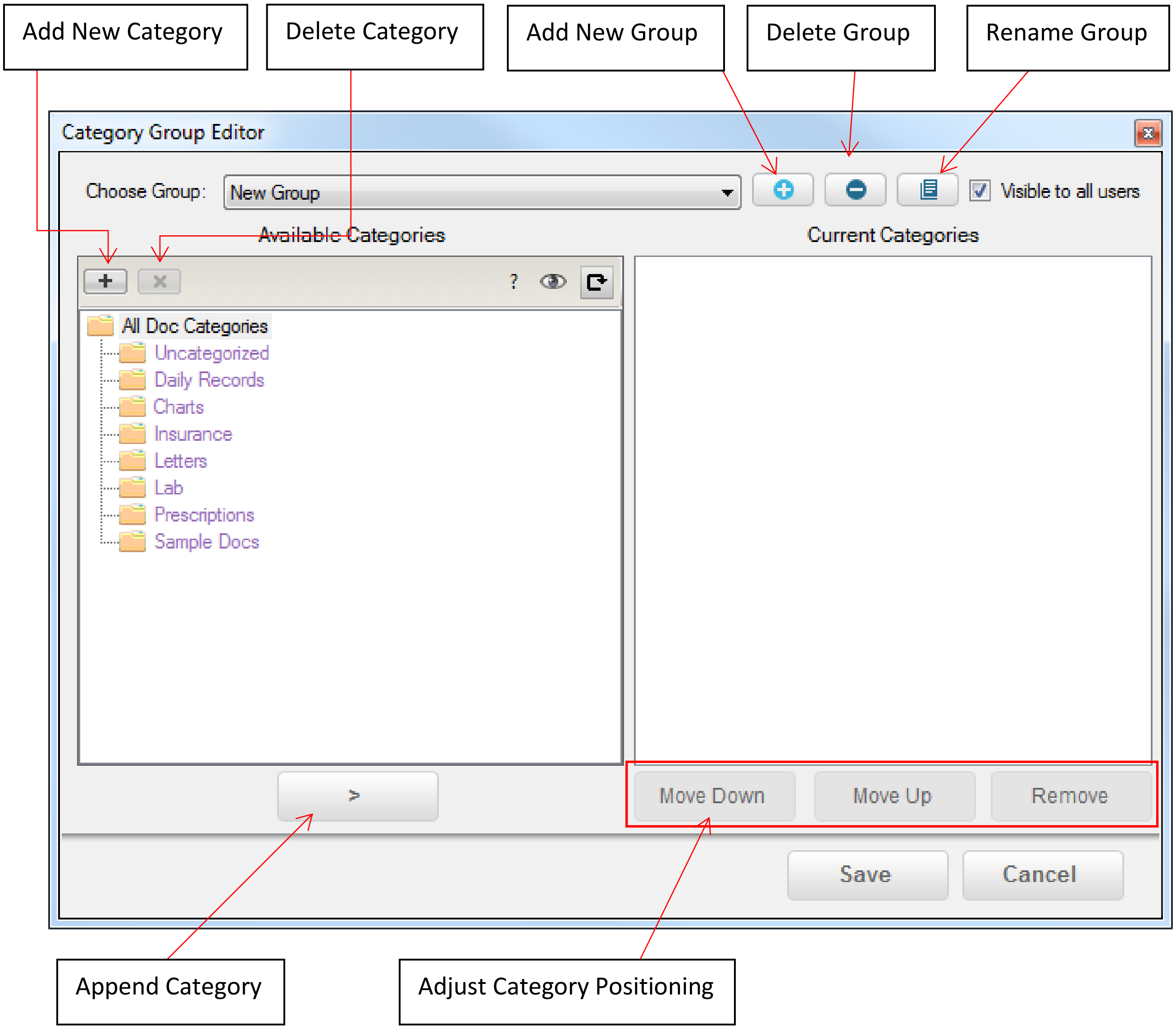


Enter a name for your new group. Click **OK** when complete.



Documents

Category Group Editor Overview



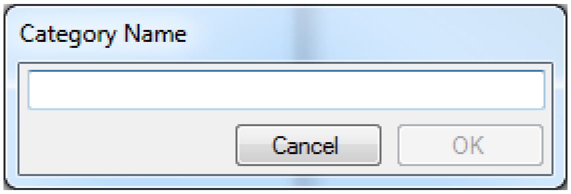
Creating a New Category

If you want to create a new category, select “All doc Categories” and click the **Add New Category** button.

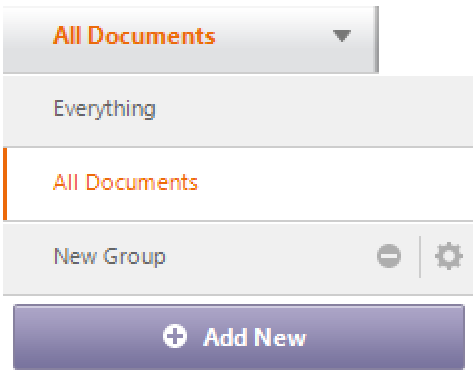
If you want to create a subcategory, select the folder you want to create the subcategory in. Click the **Add New Category** button.

Enter a category name and click **OK**.

Documents



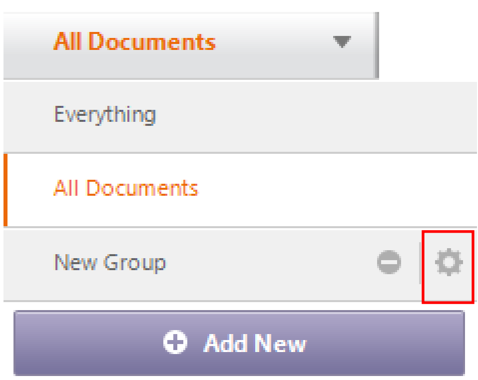
Select the category you want to add to the group. Click the **Append Category** button. Click **Save** to finish creating your group. You will now see your new group in the drop-down menu.



Editing an Existing Group

Click on the drop-down menu.

Click on the gear to open the Category Group Editor.

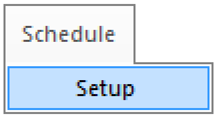


Use the tools from the Category Group Editor Overview to edit the group. Click **Save** to finish editing your group.

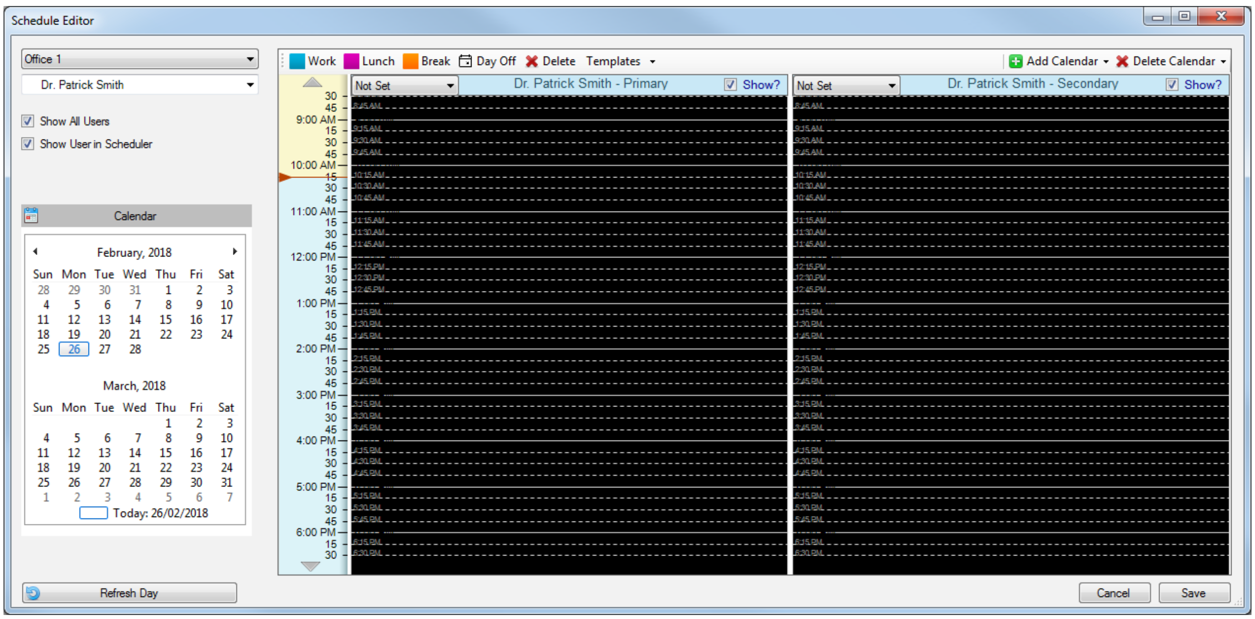
Schedule

Setting up Your Schedule

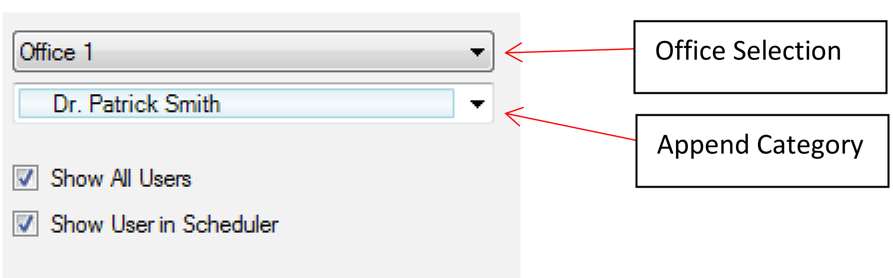
Click **Schedule** located at the top toolbar and select **Setup**.



Schedule Setup Overview

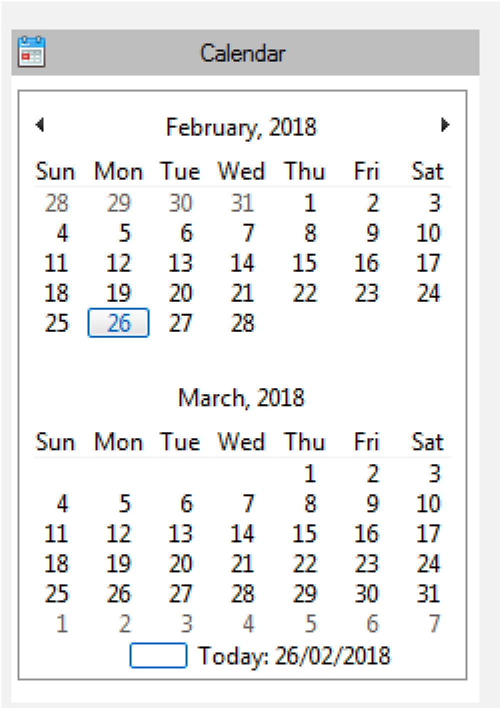


Select the office and staff member from the drop-down menus.

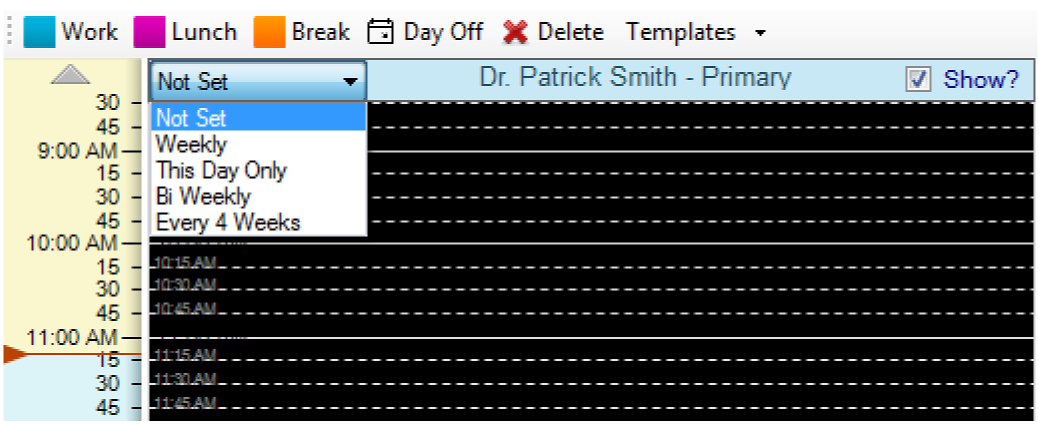


Select the day for the staff member’s schedule.

Schedule



Set the frequency of the schedule. This will be reflected by the date or weekday you choose.

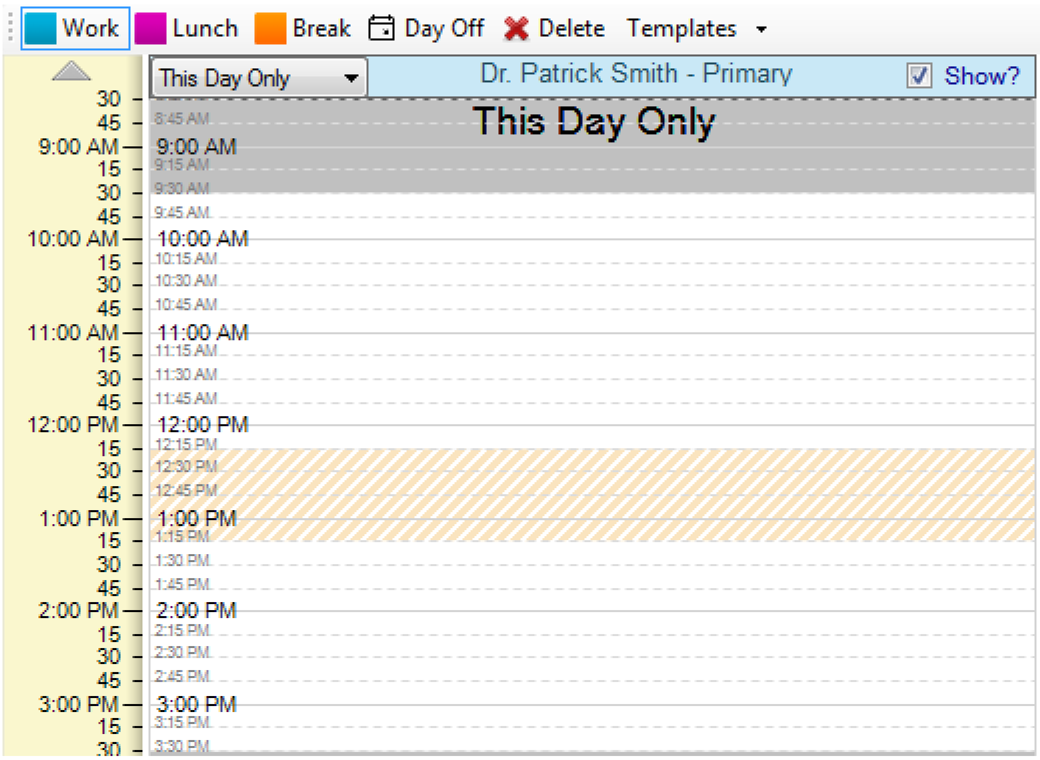


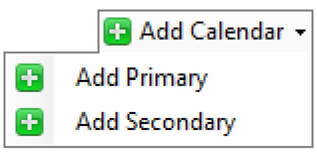
Begin creating your work schedule by clicking the **Work**, **Lunch**, **Break** or **Day off** buttons. Click and drag the event into schedule's time slot. Repeat these steps for each event.

If you would like to create a secondary calendar, use the same steps above to create your secondary work schedule.

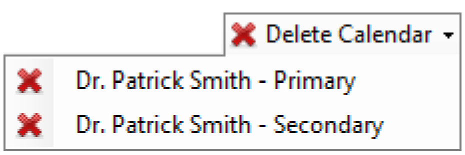
If you would like to create additional calendars, click the **Add Calendar** drop-down menu to select the calendar type.

Schedule



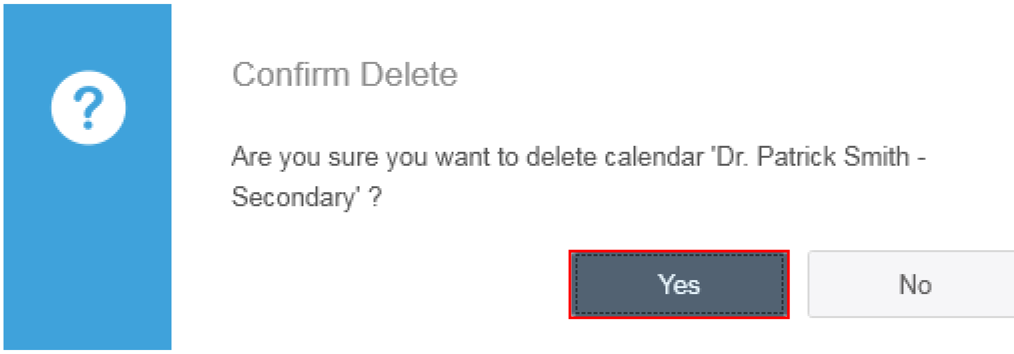


If you would like to remove one of your calendars, click the **Delete Calendar** drop-down menu and select the calendar you wish to remove.

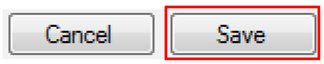


You will be prompted with a confirmation box to delete the calendar. Click **Yes** to delete the calendar.

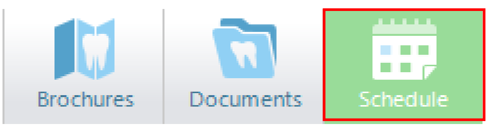
Schedule



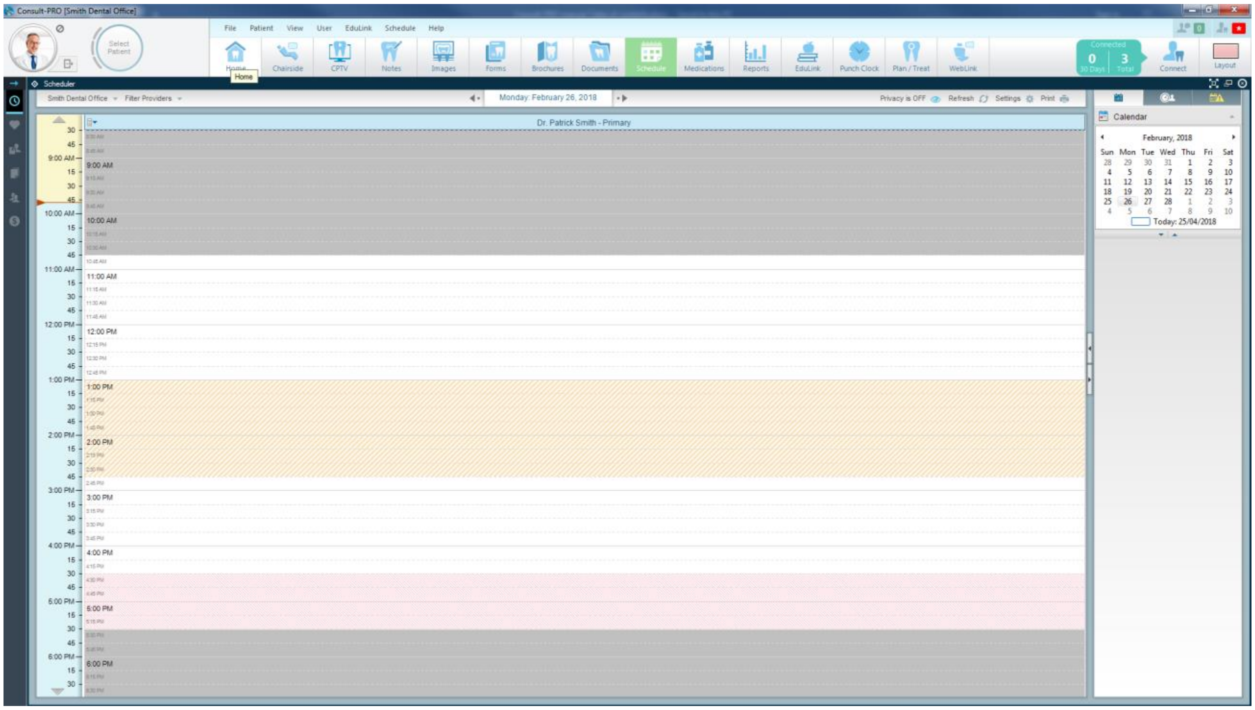
Click **Save** when complete.



To view schedules, click the **Schedule** module.

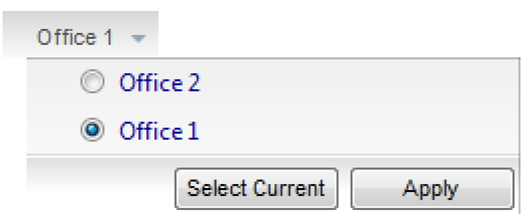


Schedule



Viewing Multiple Office Schedules

Click the drop-down with the name of your office.

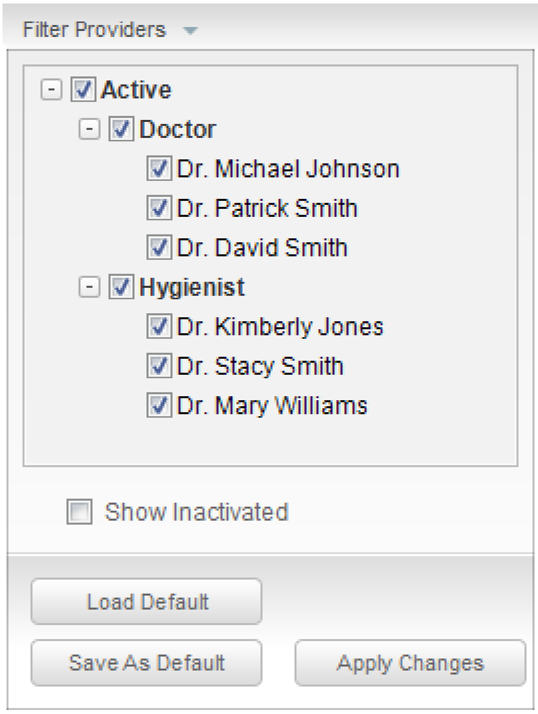


Select Current	Selects the office you are currently logged in.
Apply	Select the office and click apply to view the selected office.

Filter Providers

Filter which providers you want to see on your schedule.

Schedule



Show Inactivated	Shows inactivated user schedules.
Load Default	Loads the default filter saved.
Apply Changes	Applies filter changes to schedule.
Save As Default	Saves a default filter list.

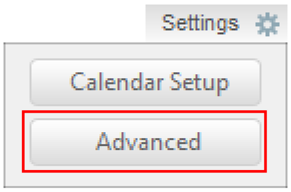
Schedule Settings

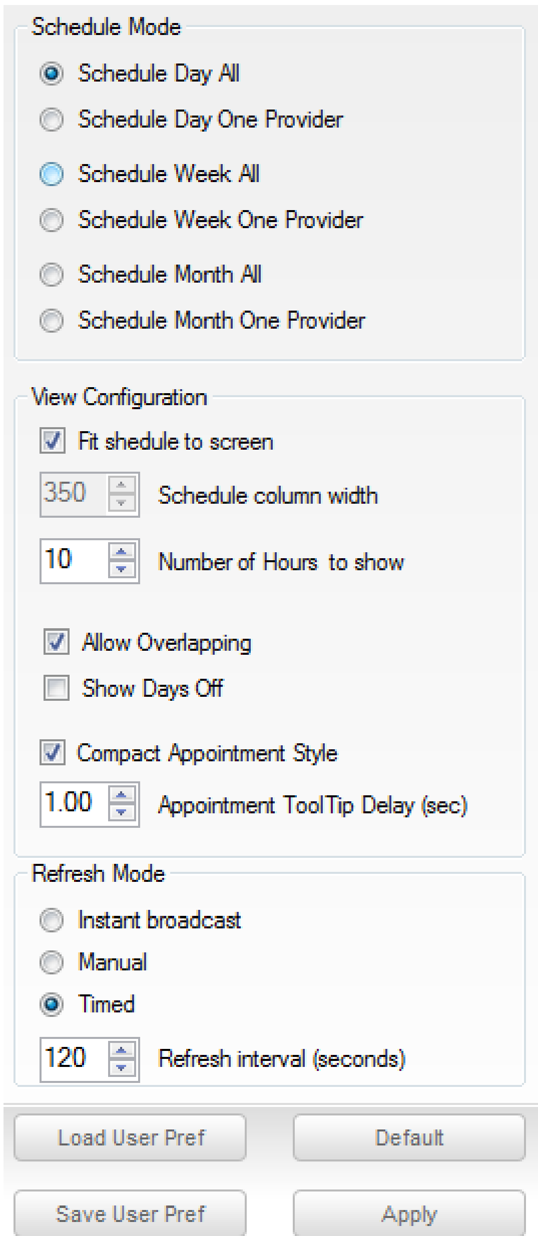
Privacy is ON	Click this if you do not want to display the patient's last name and age on the schedule.
Refresh	Refreshes the schedule.

Schedule Advanced Settings

Click **Settings** and click **Advanced**.

Schedule





Schedule Day All	View all provider schedules for a single day.
Schedule Day One Provider	View a single provider’s schedule for a single day.

Schedule

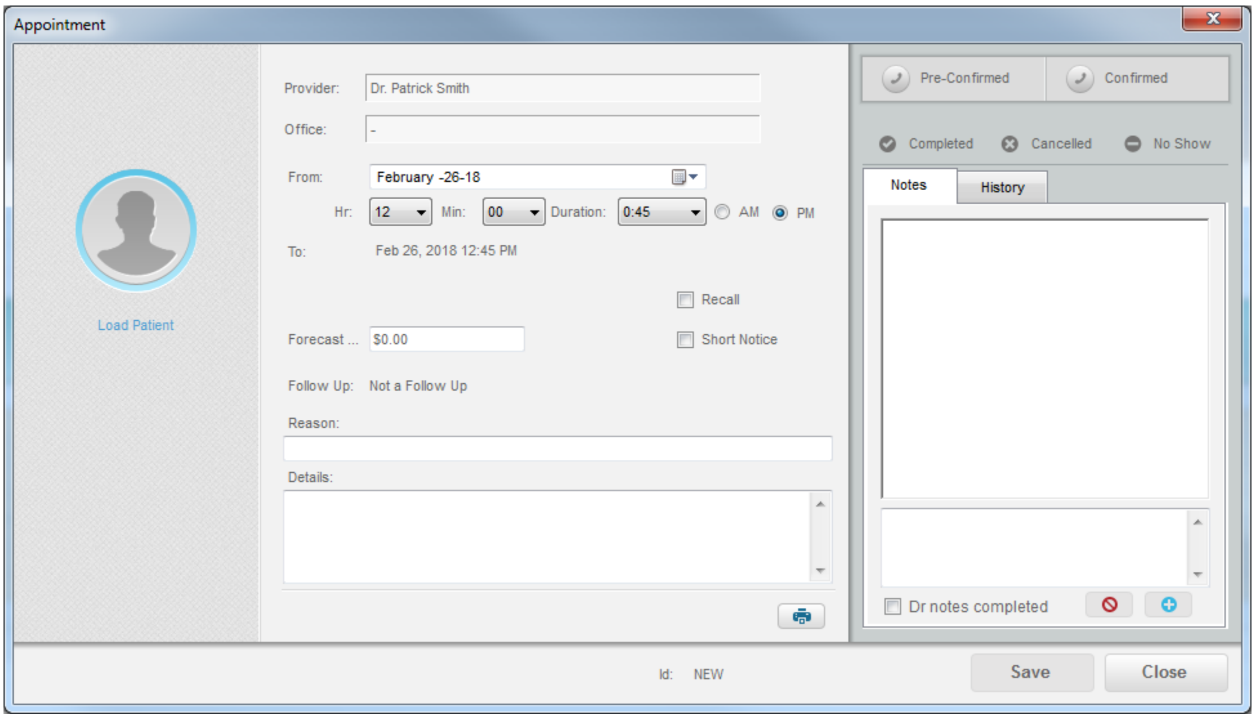
Schedule Week All	View all provider schedule for the week.
Schedule Week One Provider	View a single provider's schedule for the week.
Schedule Month All	View all provider schedules for a month.
Schedule Month One Provider	View a single provider's schedule for a month.
Fit shedule to screen	Does not set a fixed width for schedules.
350 Schedule column width	Sets column width for schedules.
10 Number of Hours to show	Displays the number of hours shown in scheduler.
Allow Overlapping	Ability to book appointments within the same time slot.
Show Days Off	Displays schedules marked as days off.
Compact Appointment Style	Displays limited information of the appointment on the schedule.
1.00 Appointment ToolTip Delay (sec)	Sets the delay of hovering over appointments to view additional details.
Instant broadcast	When there is a change in the schedule it instantly updates the schedule for all computers.
Manual	Manually refreshes the schedule for changes.
Timed	Schedule refreshes based off a user defined timed interval.
120 Refresh interval (seconds)	Sets the fresh interval when selecting Timed.
Load User Pref	Loads the user preferred settings.
Default	Reverts to the default settings.
Apply	Apply changes to the schedule.
Save User Pref	Saves user advanced settings preference.

Schedule

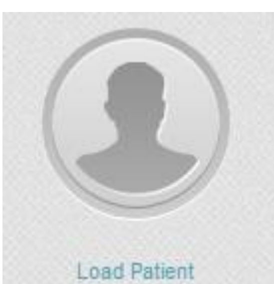
Booking an Appointment

Click, hold and drag the selected time slot or double click the schedule.

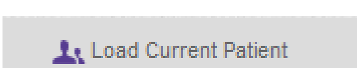
Appointment Window:



Click **Load Patient** to load your patient.

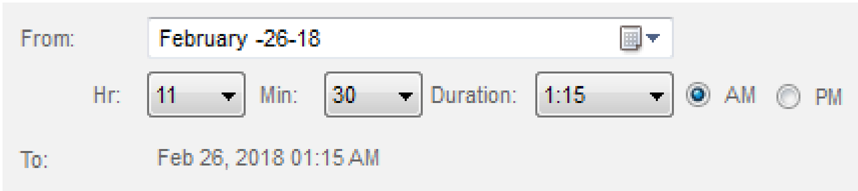


If you already have your patient loaded, click **Load Current Patient**.

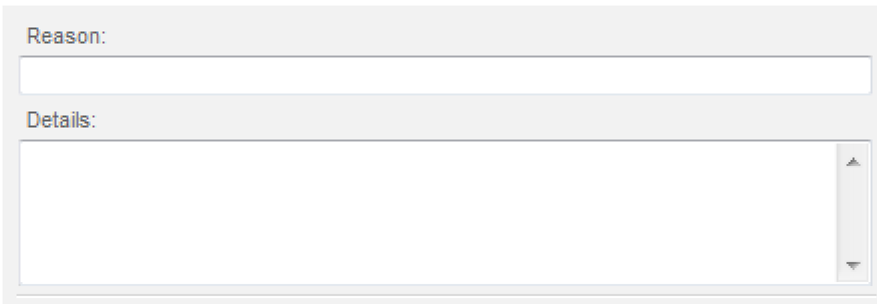


Ensure the date is correct. Set the time and duration of the appointment.

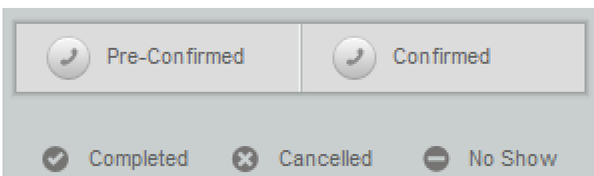
Schedule



Enter a reason for the appointment. You may also provide details about the appointment.



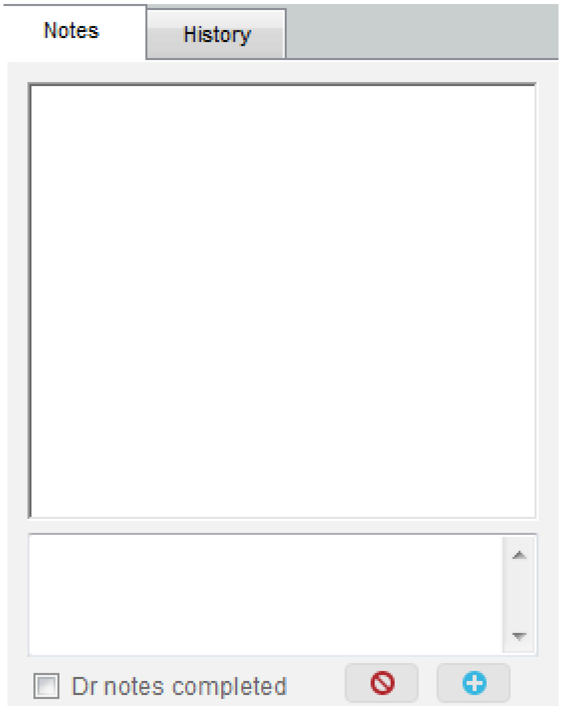
Set the status of the appointment.



Pre-Confirmed	Patient has pre-confirmed this appointment within 8 days of the appointment. Appointment colour changes to purple.
Confirmed	Patient has confirmed this appointment within 2 days of the appointment. Appointment colour changes to green.
Completed	Appointment has been completed.
Cancelled	Appointment has been cancelled.
No Show	Paint did not show up for appointment.

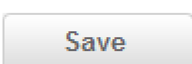
Schedule

You may enter notes for the patient here.

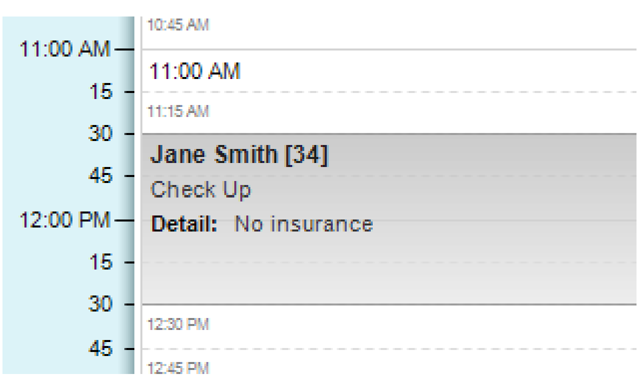


Dr notes completed	The doctor has completed their notes.
	Clear note
	Add note

Click **Save** when complete.



You will now see the appointment on the schedule.

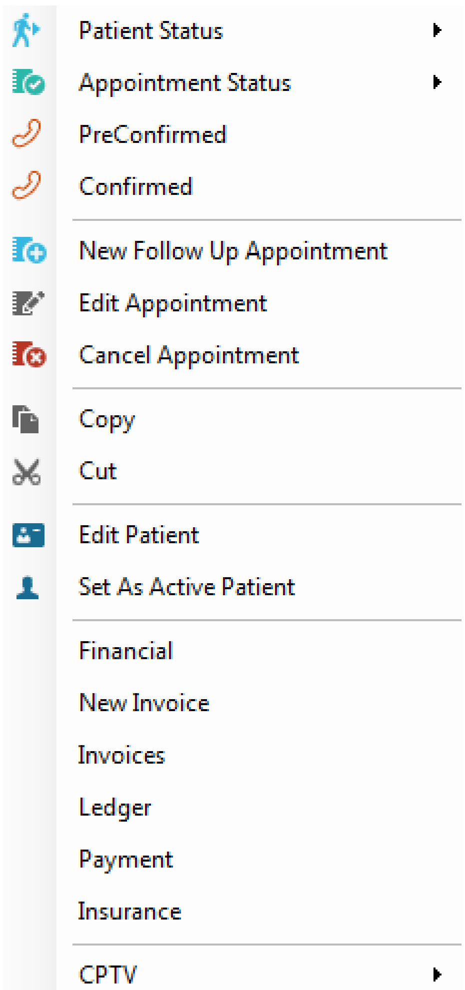


Schedule

**Information about the appointment can be edited anytime by double clicking the appointment.

Schedule Context Menu

Right click the appointment to access the schedule context menu.



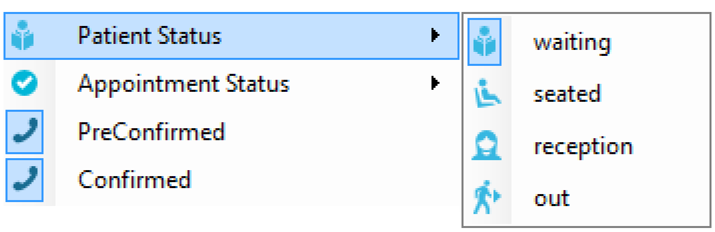
Patient Status	Changes the patient status.
Appointment Status	Changes the appointment status.
PreConfirmed	Patient has pre-confirmed this appointment within 8 days of the appointment. Appointment colour changes to purple.

Schedule

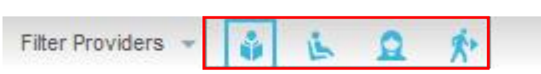
Confirmed	Patient has confirmed this appointment within 2 days of the appointment. Appointment colour changes to green.
New Follow Up Appointment	Creates a new follow up appointment.
Edit Appointment	Edits the patient's appointment.
Cancel Appointment	Cancels the patient's appointment.
Copy	Copies patient's appointment.
Cut	Cuts patient's appointment.
Edit Patient	Edit patient profile.
Set As Active Patient	Login the patient.
Financial	Opens financial tab in patient profile.
New Invoice	Creates a new invoice.
Invoices	View patient's invoices.
Ledger	View patient's ledger.
Payment	Opens patient's payment.
Insurance	Open's patient's insurance.
CPTV	Calls patient on CPTV.

Setting Patient Status

Patient status can be set from the Schedule Context menu or clicking the icons beside **Filter Providers**.



Select the appointment. You will see the options available to set the patient status.

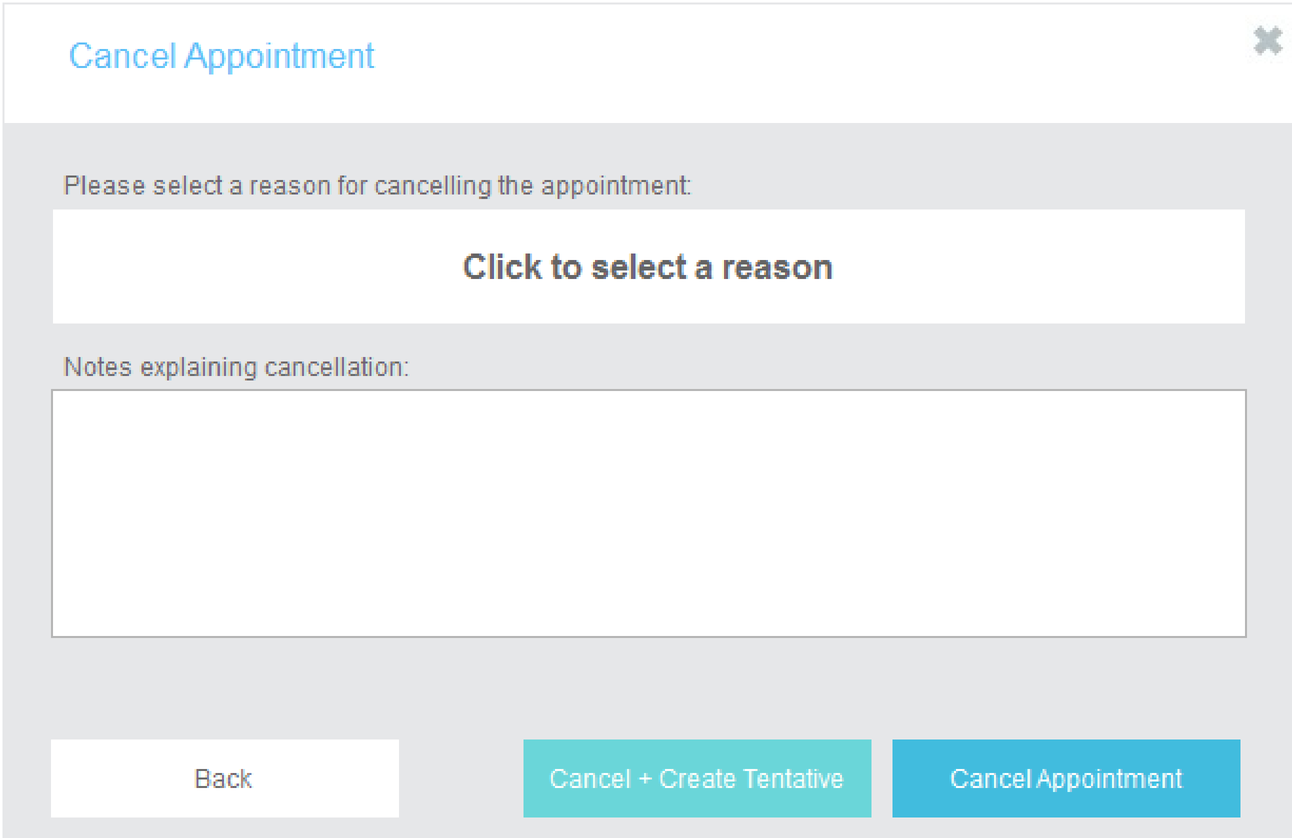


Cancelling an Appointment

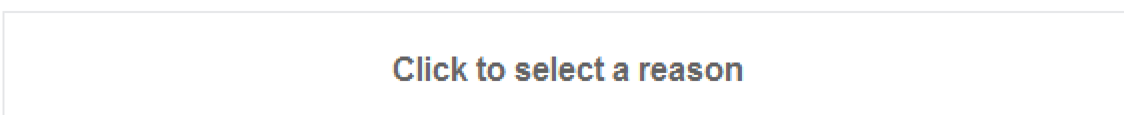
Right click the appointment and select **Cancel Appointment**.
Alternative Option: Open the appointment, click **Cancelled**, then click **Save**.

Schedule

The Cancel Appointment window will open.



Click **Click to select a reason** and select a reason.



Enter notes explaining the cancellation. This is optional.

Click **Cancel + Create Tentative** to cancel the appointment and create a tentative appointment. It will launch the appointment window to create a new appointment.

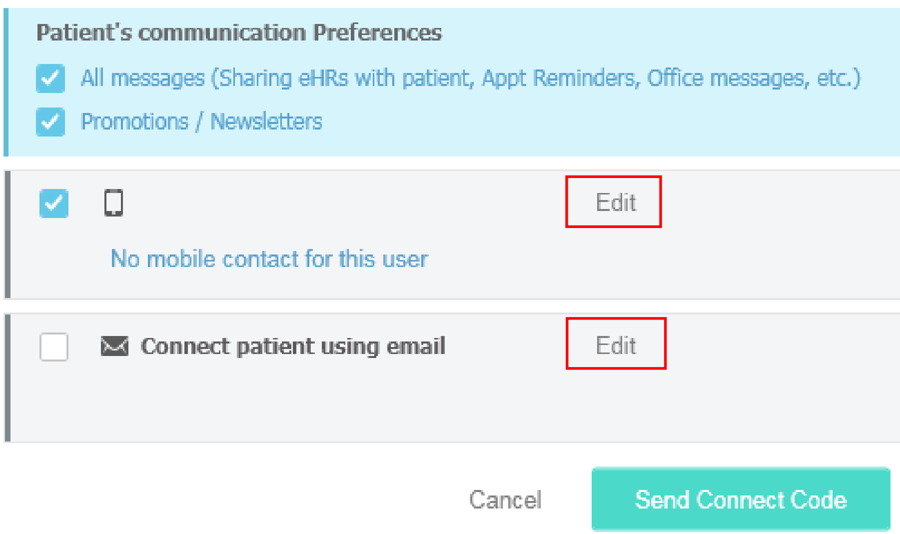
Click **Cancel Appointment** to cancel the appointment without creating a tentative appointment.

Connect

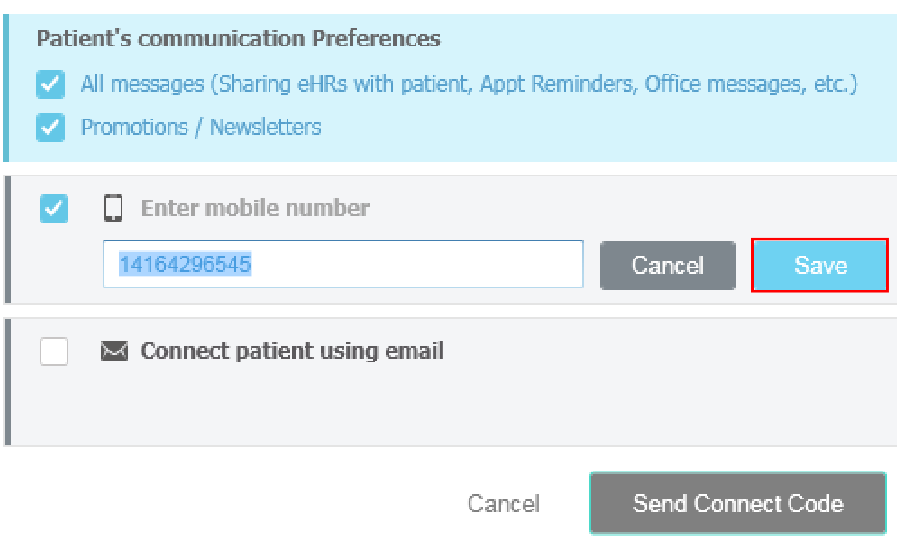
Inviting a Patient to Join Connect

Click the **Send Connect Code** button.

Click **Edit** beside the patient's preferred method of contact, mobile or email.

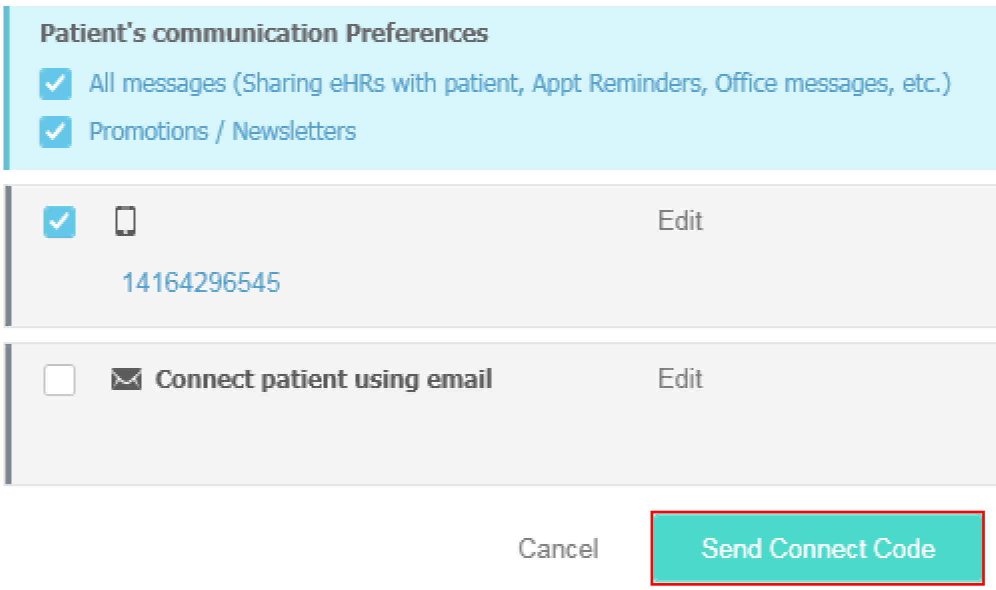


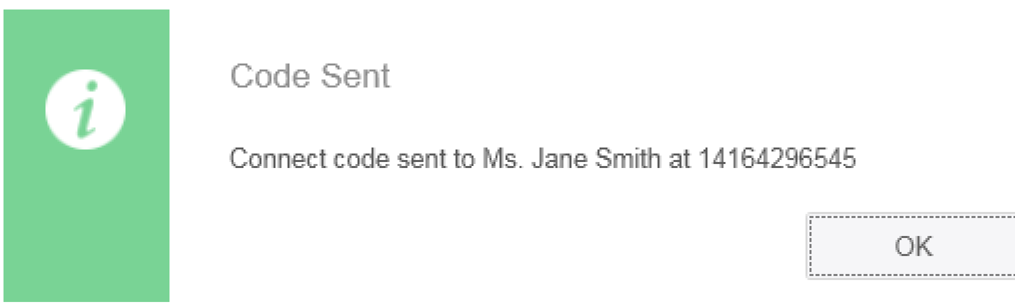
Enter the patient's contact information and click **Save**. The patient can use either a mobile number (North America Only) or Email.



Connect

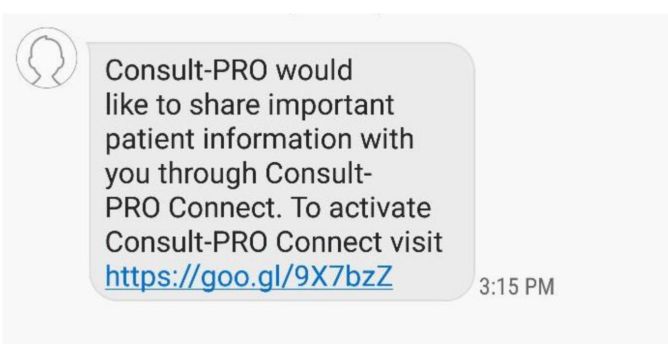
Click **Send Connect Code**.





Patient Registration

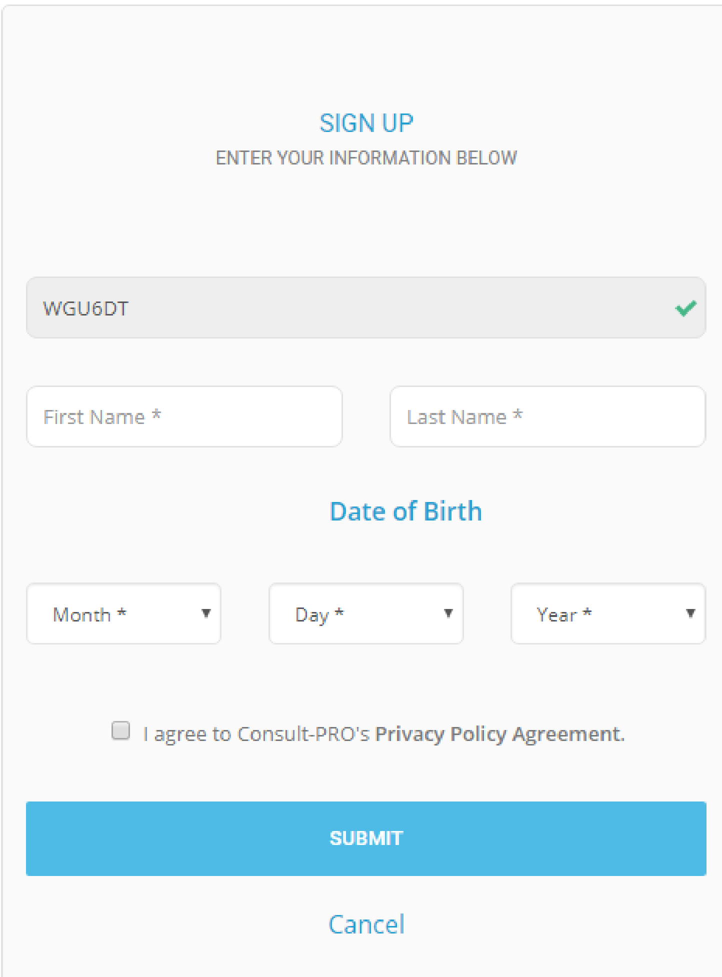
After the Connect code has been sent, the patient will receive a Connect invitation.



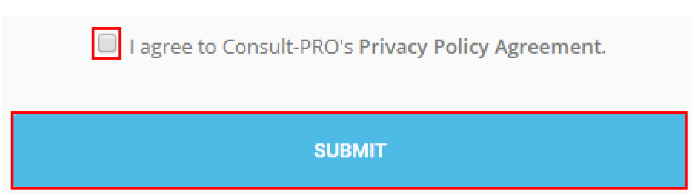
The patient will click the link in the message. It will open the Consult-PRO Sign Up page.

Connect

Consult-PRO™ CONNECT
TAKE CONTROL OF YOUR DENTAL RECORDS

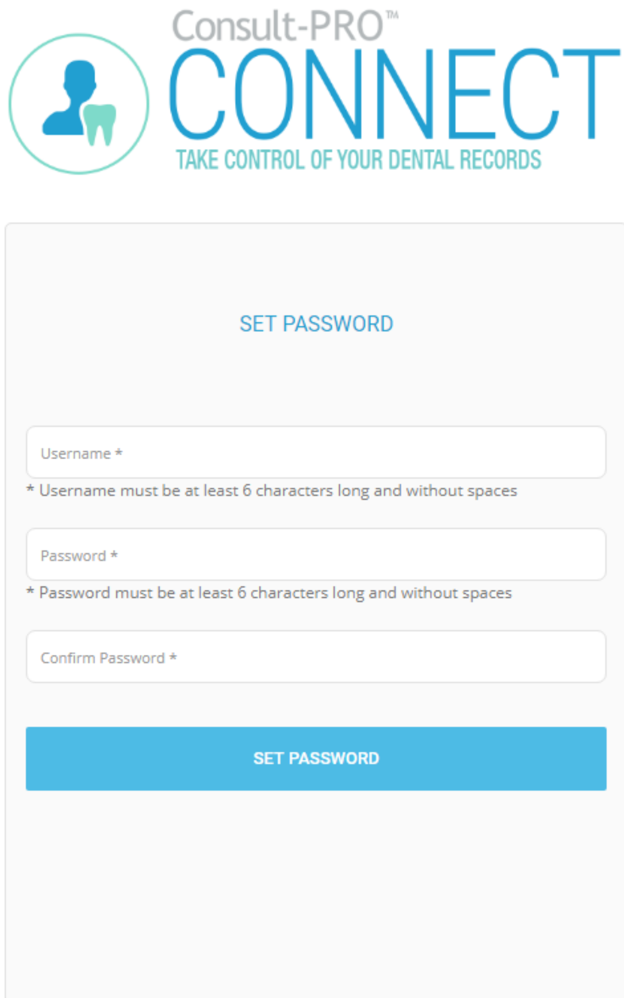


The patient will enter their name, date of birth and read the Privacy Policy Agreement. If they wish to use our service, they will click the box and click **Submit**.



Connect

The patient will now see the Consult-PRO Set Password page.



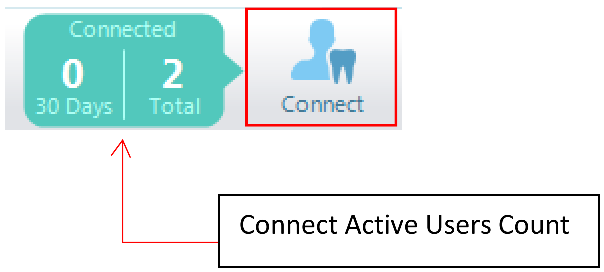
Enter a username and password of your choice. Click Set Password when complete.

The patient has now successfully joined Consult-PRO Connect.

Connect

Connect Administrative Page

Login with a user. Click the **Connect** button.

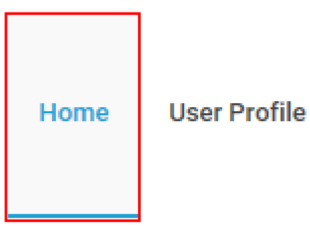


Connect Active Users Count

30 days: Displays how many users have joined Connect in the last 30 days.
Total: Displays the total amount of users that have joined Connect.

Editing User and Office Information

Click on the **Home** tab.



Click **EDIT MODE** under **About The User** and **About The Office.** This will allow you edit information about the user and office.

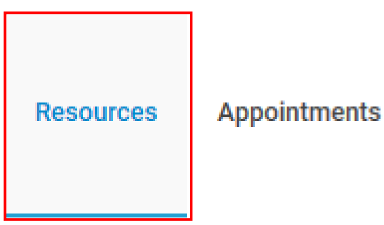
User profiles will only display for Hygienist and Doctor types. You must have General Admin privilege to edit **About The Office.

Connect

Enter the text you would like to display to your patients. Click **PREVIEW** to display a preview of what the patient will see. Click **SAVE** to apply the changes.

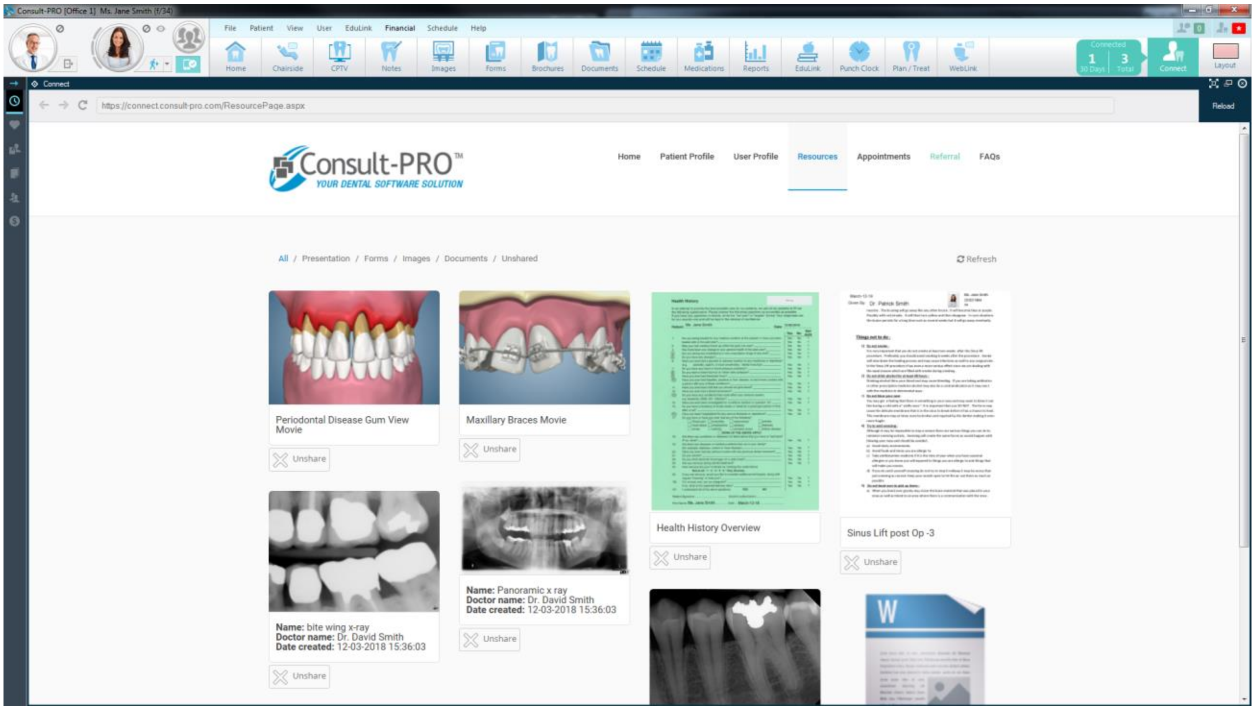
Removing Shared Content with Patients

Click the **Resources** tab.

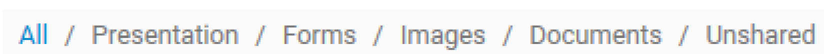


You will see all the content you have shared with the patient.

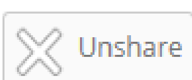
Connect



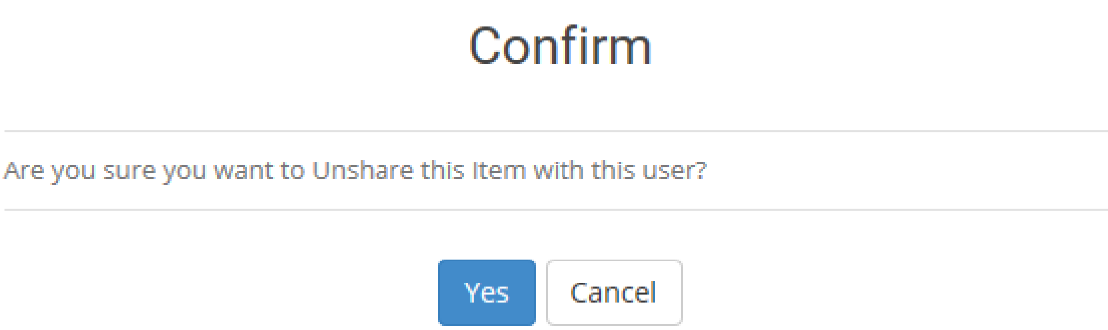
You can use the filters to sort by category.



Click Unshare to remove the item from the patient’s Connect account.

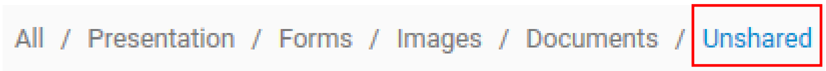


Click **Yes** to confirm removing the item.



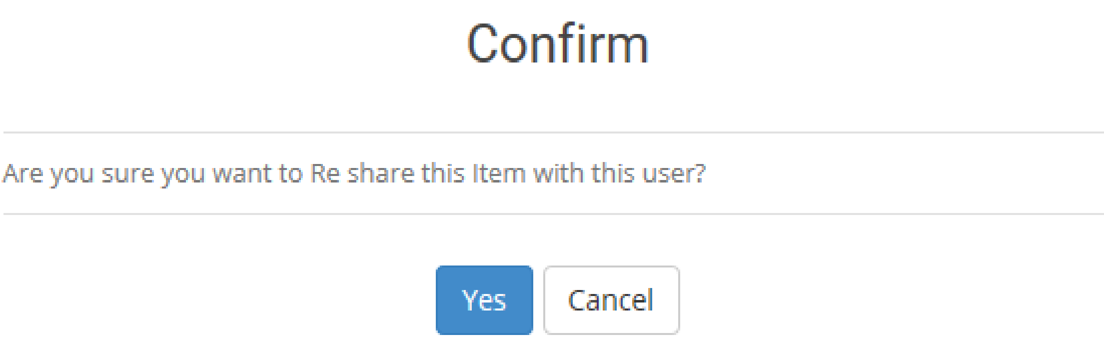
The removed item will move to the Unshared filter.

Connect



If you want to share the item with the patient again, click **Reshare**.

Click **Yes** to confirm sharing the item.



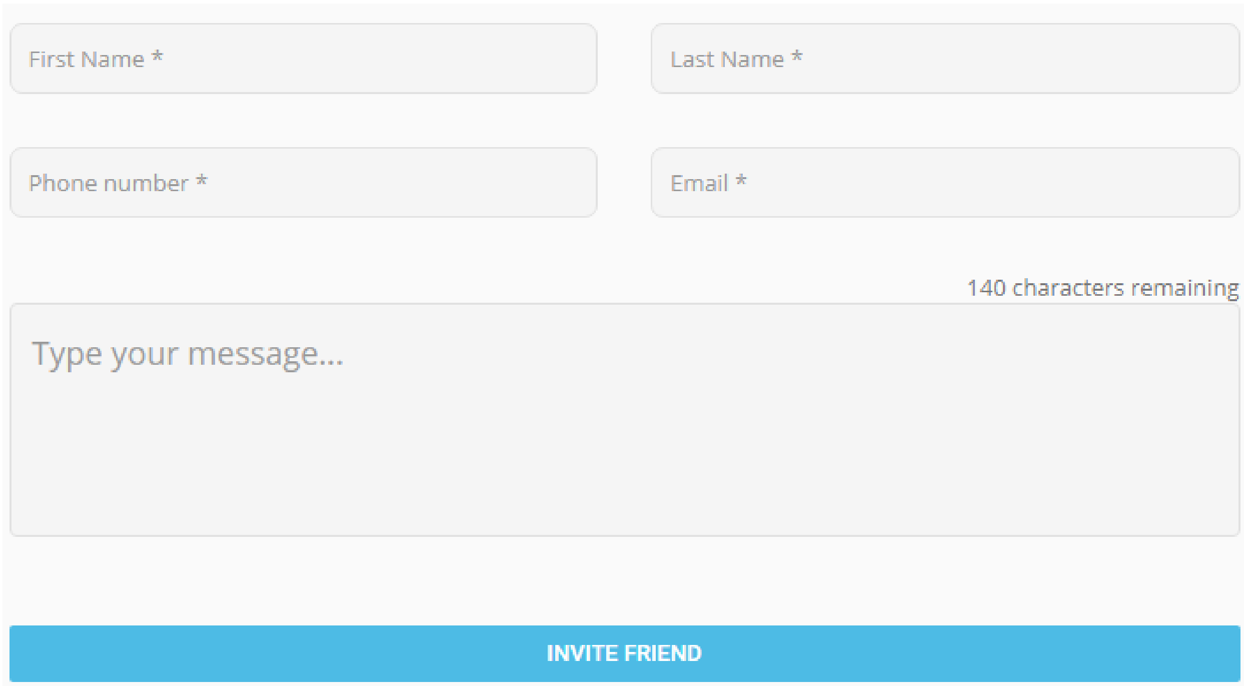
Referring a Friend

The patient will login to their Connect account. Click **Menu** located at the top right.

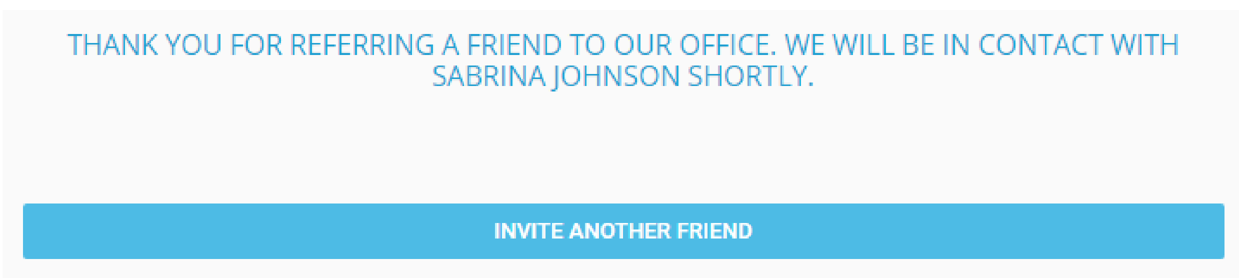
Click **Referral** to open the referral page.

The patient will enter their friend’s details. The friend will receive a message to the method of contact the patient provided. Click **INVITE FRIEND** when complete.

Connect

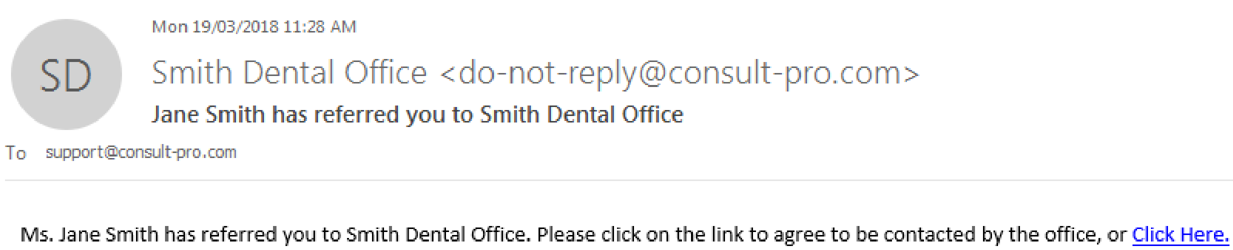


The patient's referred friend has been referred to your dental office.



The following steps are what the patient's referred friend will see.

Click on the link provided in the email or text message.



You will see the following when they click on the link:

Connect

Consult-PRO™ CONNECT

TAKE CONTROL OF YOUR DENTAL RECORDS

You have been referred by **Ms. Jane Smith** to **Smith Dental Office**.

By submitting this form you agree that Smith Dental Office can contact you *

To be contacted by phone click the **"Call Me"** button below.

CALL ME

OR Please review your **Referral** information below & Join Consult-PRO Connect

Confirm my Information

Sign me up

Click **CALL ME** if you would like to provide your personal details over the phone.

CALL ME

If a phone number was not provided you will see the following.

Phone number *

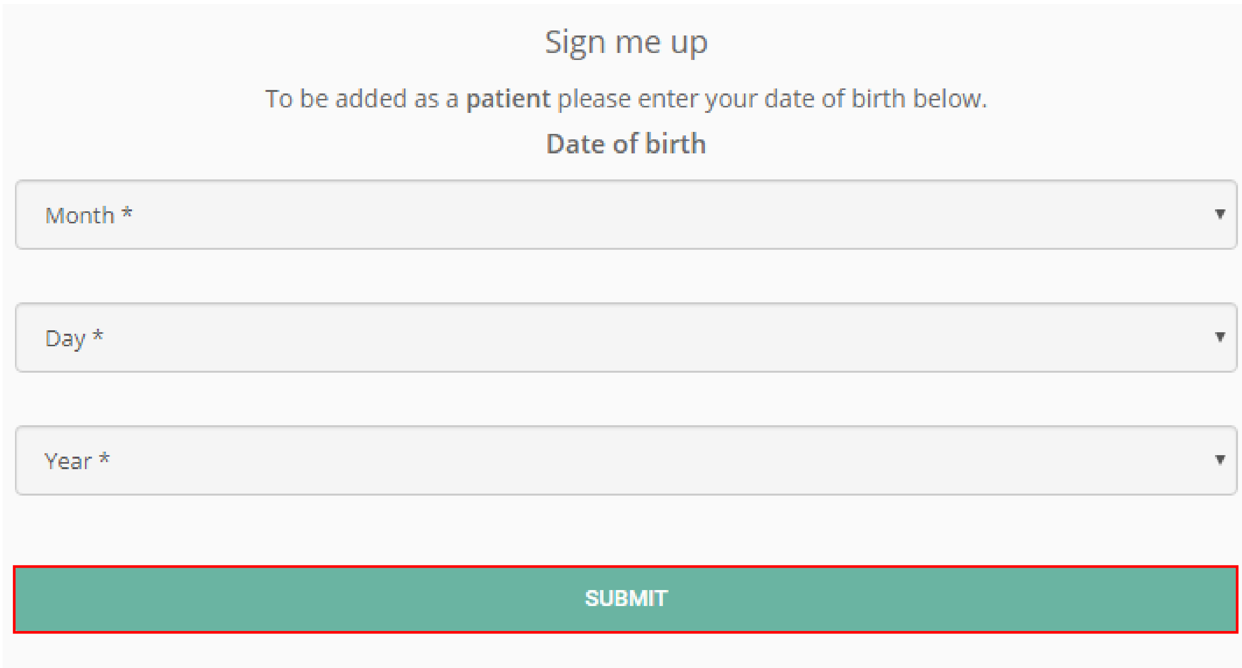
CONFIRM

OR Please review your **Referral** information below & Join Consult-PRO Connect

Connect

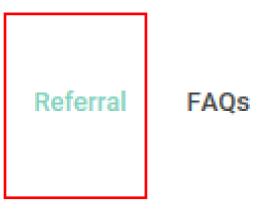
If you want to send your personal details electronically to the dental clinic, Click **Sign me Up**.

Enter your date of birth and click **Submit**.



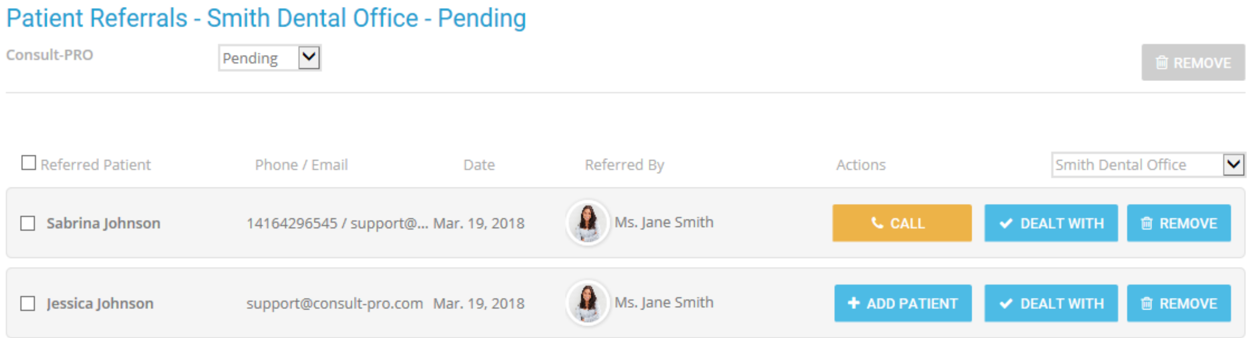
Adding Referred Patients

Click the **Referral** tab.

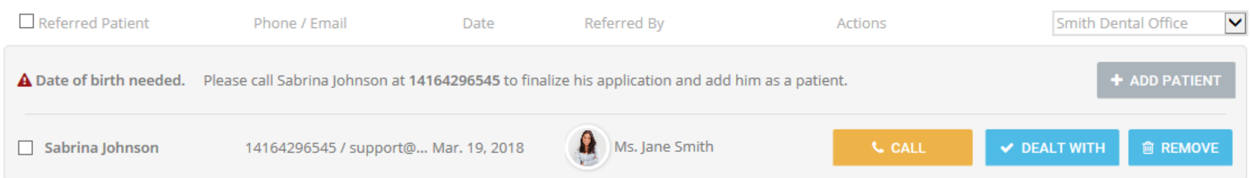


You will see the following.

Connect



Click **Call** for patients that wish to provide their date of birth over the phone.



Click **ADD PATIENT** after you have retrieved the patient's date of birth.

The patient window will appear. Change the date of birth and click **Save.**

For patients that have already supplied all the necessary details, you will see **ADD PATIENT** in blue.

The patient window will appear, click **Save.**

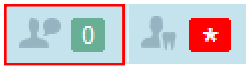
If you have received multiple referrals for the same patient that you have added, click **DEALT WITH**. The patient will be moved to the completed status.

If you want to remove a referral, click **REMOVE.**

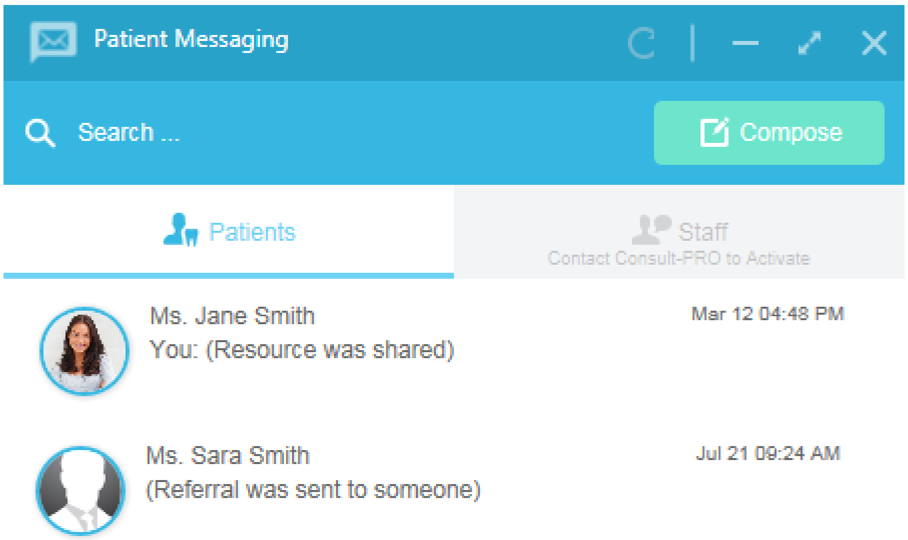
Connect

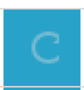
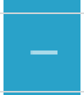
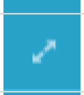
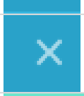
Messaging

Click the messaging button.



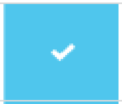
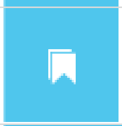
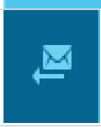
The Patient Messaging window will pop up.



	Refreshes the patient window.
	Minimizes the patient window.
	Expands the patient window.
	Closes the patient window.
Compose	Compose a new message for a patient.
Search ...	Search for patient conversations.
Include Completed	Display completed conversations.
Smith Dental Office	Office filter to display messages from multiple offices.

Connect

Message Options

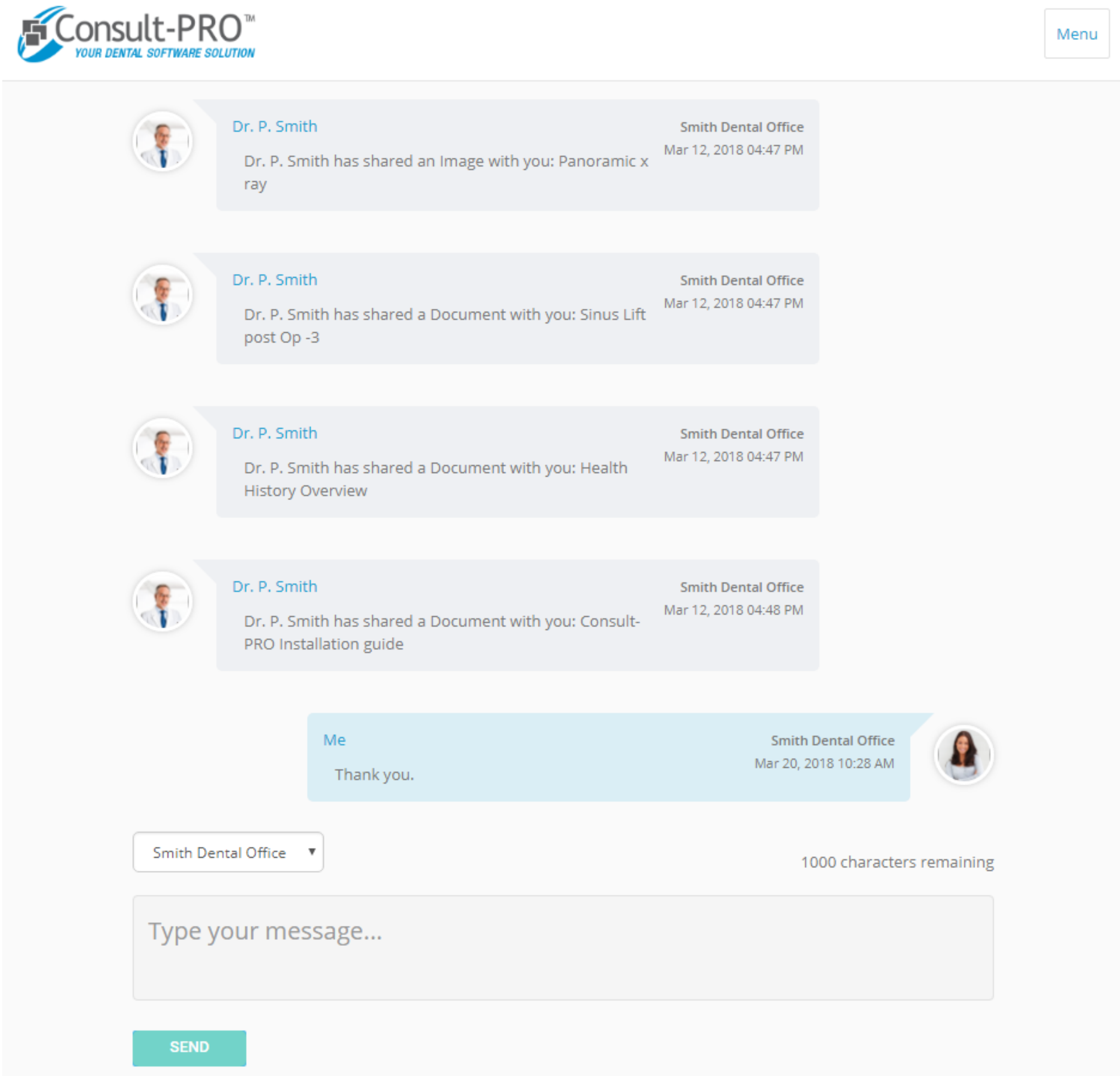
	Complete the conversation.
	Mark all messages as read.
	Login this patient.
	Close the messaging window.
Mark as Read	Mark message as read.
Send	Send a message.
Notify by: SMS Email Include message	Notify patient by SMS and Email when a message is sent. Include message includes the message with the notification. All options can be turned on or off.

How Do Patients Send the Office Messages?

The patient will login to their Connect account.

Click the Messaging icon.

Connect

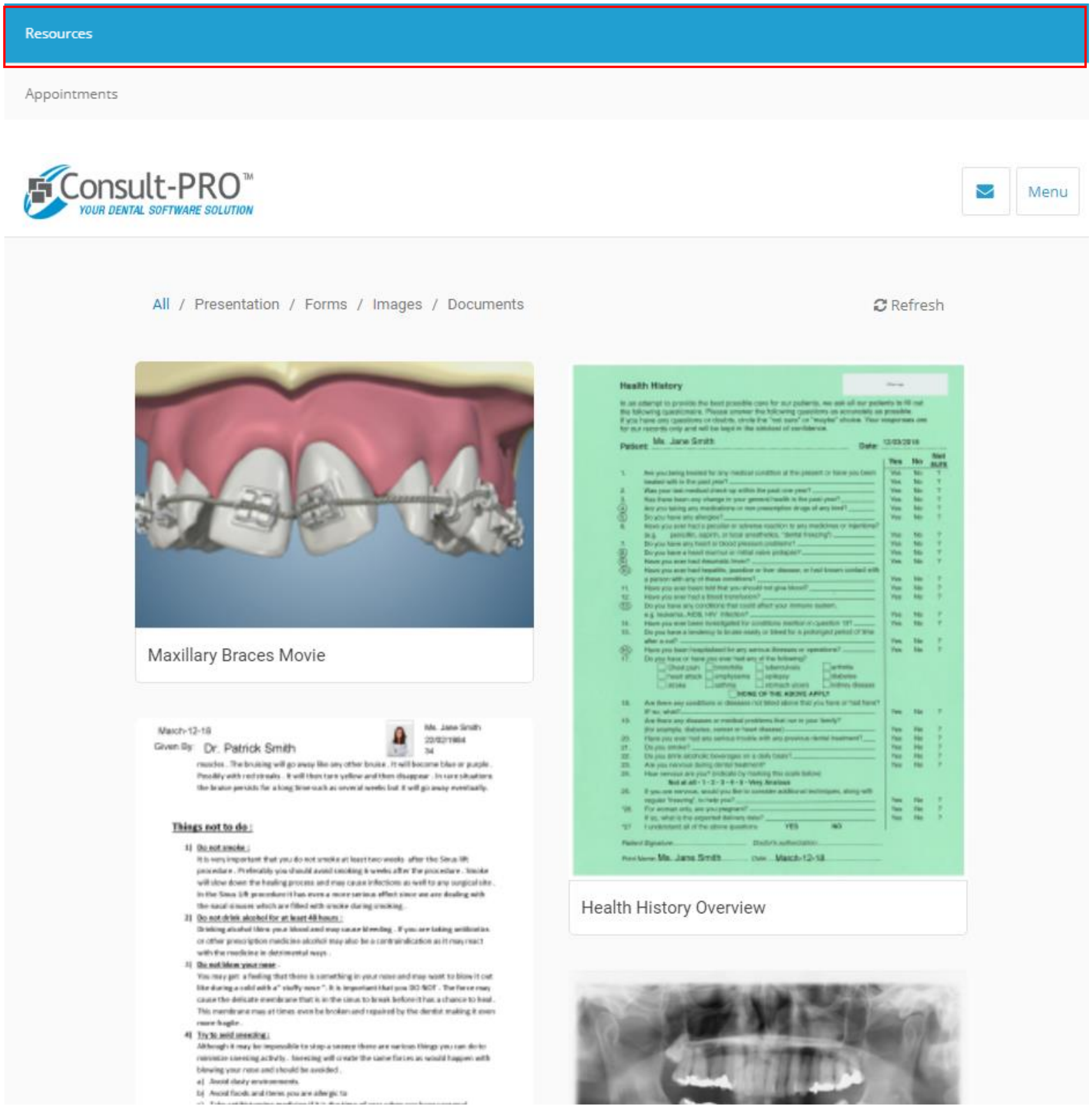


How Do Patients Access Resources I share with them?

The patient will login to their Connect account.

Click **Menu** and click **Resources**.

Connect

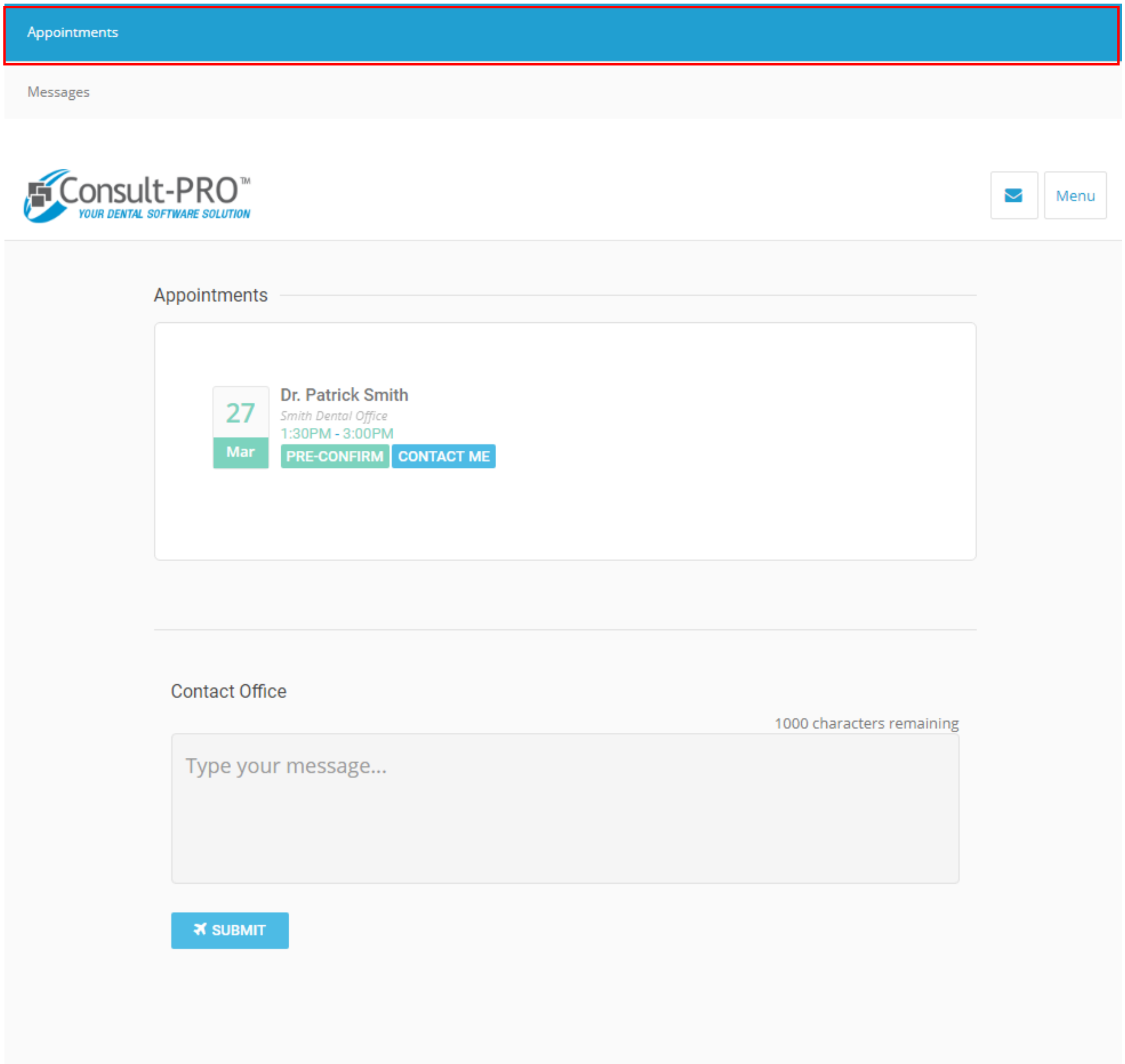


How Can Patients See Their Appointments?

The patient will login to their Connect account.

Click **Menu** and click **Appointments**.

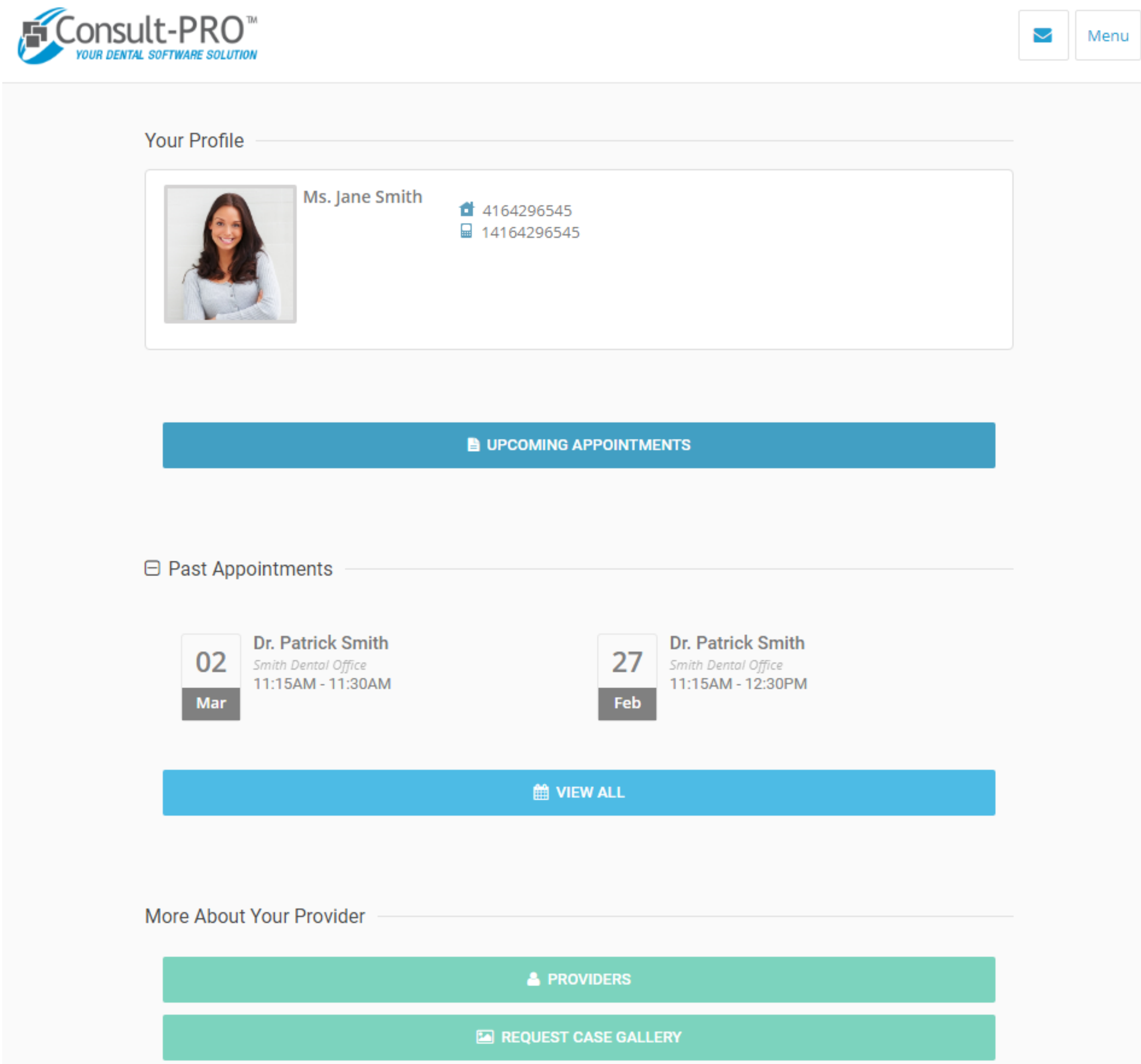
Connect



The patient can pre-confirm and confirm appointments.

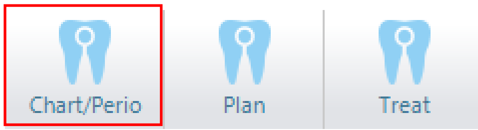
If you would like to see your past appointments, it can be found in **My Profile**.

Connect


Consult-PRO™
YOUR DENTAL SOFTWARE SOLUTION
Menu
Your Profile
Ms. Jane Smith
4164296545
14164296545
UPCOMING APPOINTMENTS
Past Appointments
02
Mar
Dr. Patrick Smith
Smith Dental Office
11:15AM - 11:30AM
27
Feb
Dr. Patrick Smith
Smith Dental Office
11:15AM - 12:30PM
VIEW ALL
More About Your Provider
PROVIDERS
REQUEST CASE GALLERY

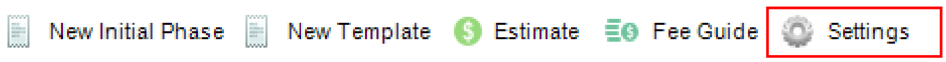
Treatment Planning

To begin using Treatment Planning, login with a user and patient. Click the **Chart / Perio** button.



Setting up Your Fee Guide

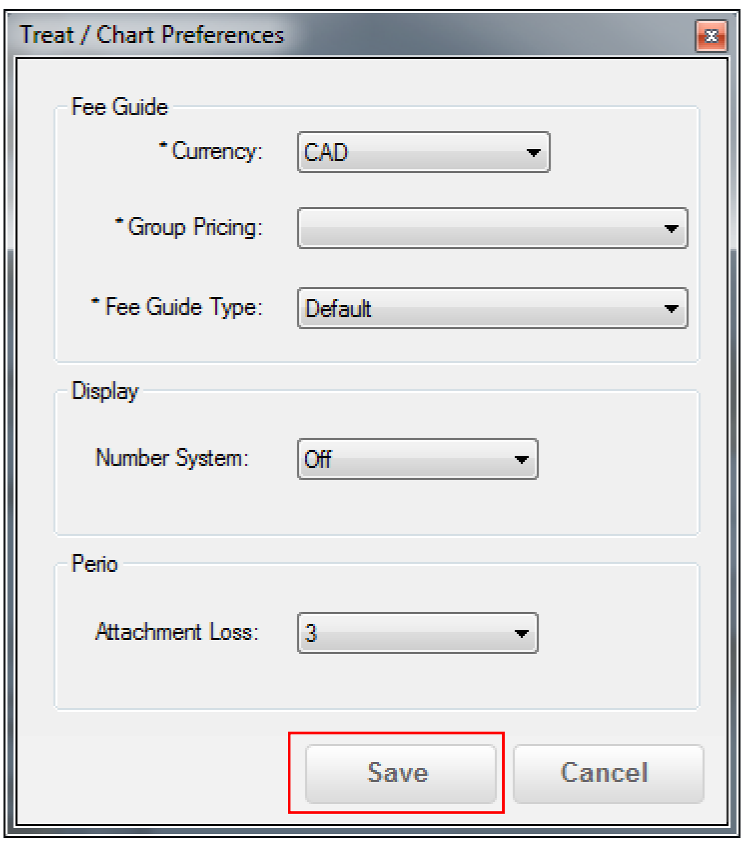
Click the **Settings** button.



Treat / Chart Preferences will display. Set all the drop-down menus to your desired preference.

Fee Guide Type:

Practice Wide: Guidelines from ODA/ADA fee guide can be edited across the entire practice.
Primary: Guidelines from ODA/ADA fee guide can be edited for your primary chair.
Secondary: Guidelines from ODA/ADA fee guide can be edited for your secondary chair.
Default: Guidelines from ODA/ADA fee guide are used with no revisions.

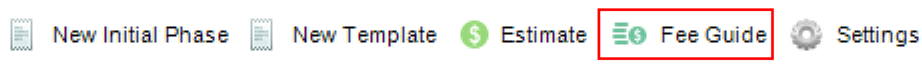


Treatment Planning

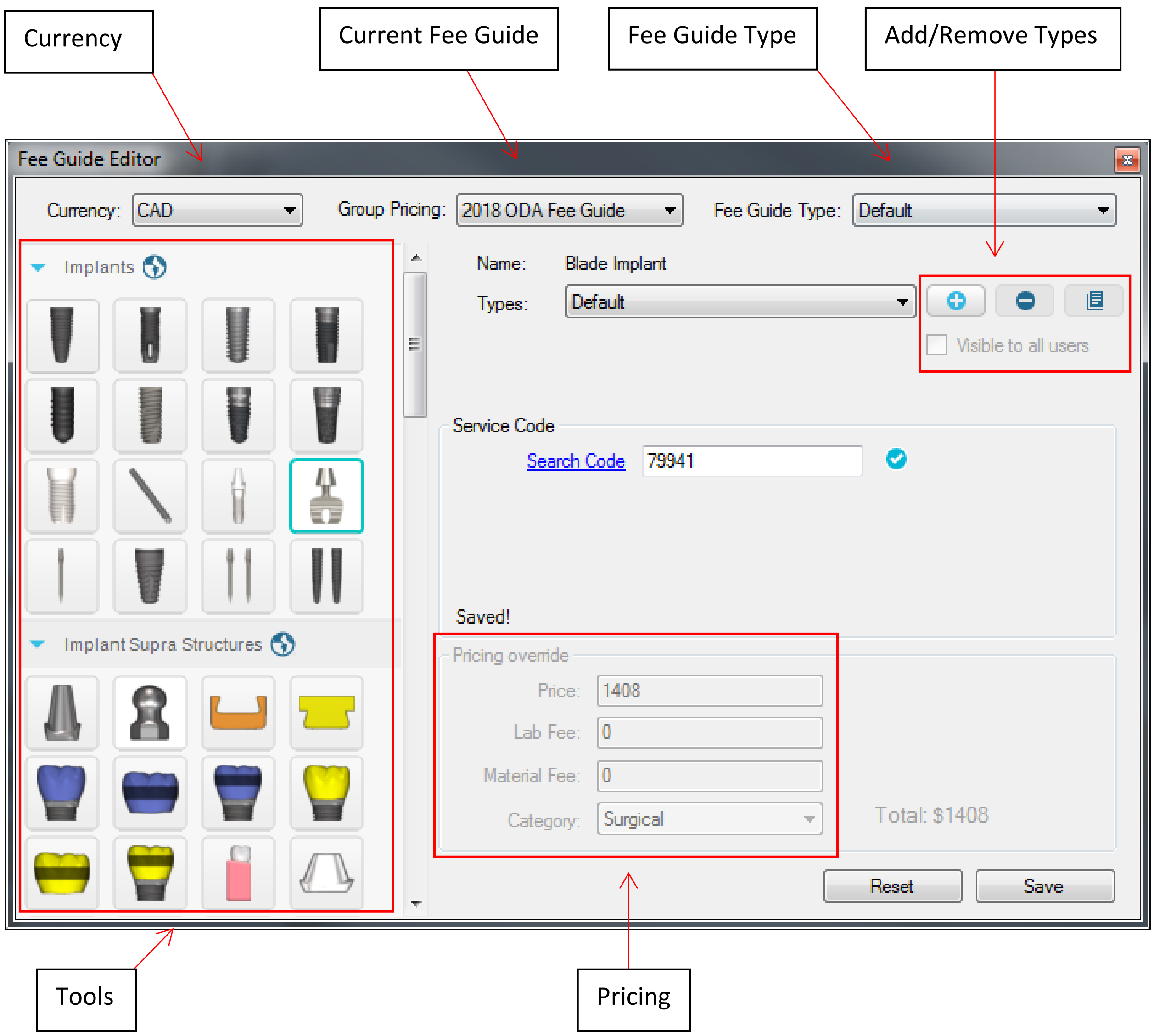
Click **Save** when complete.

Editing the Fee Guide

Click the **Fee Guide** button**.**



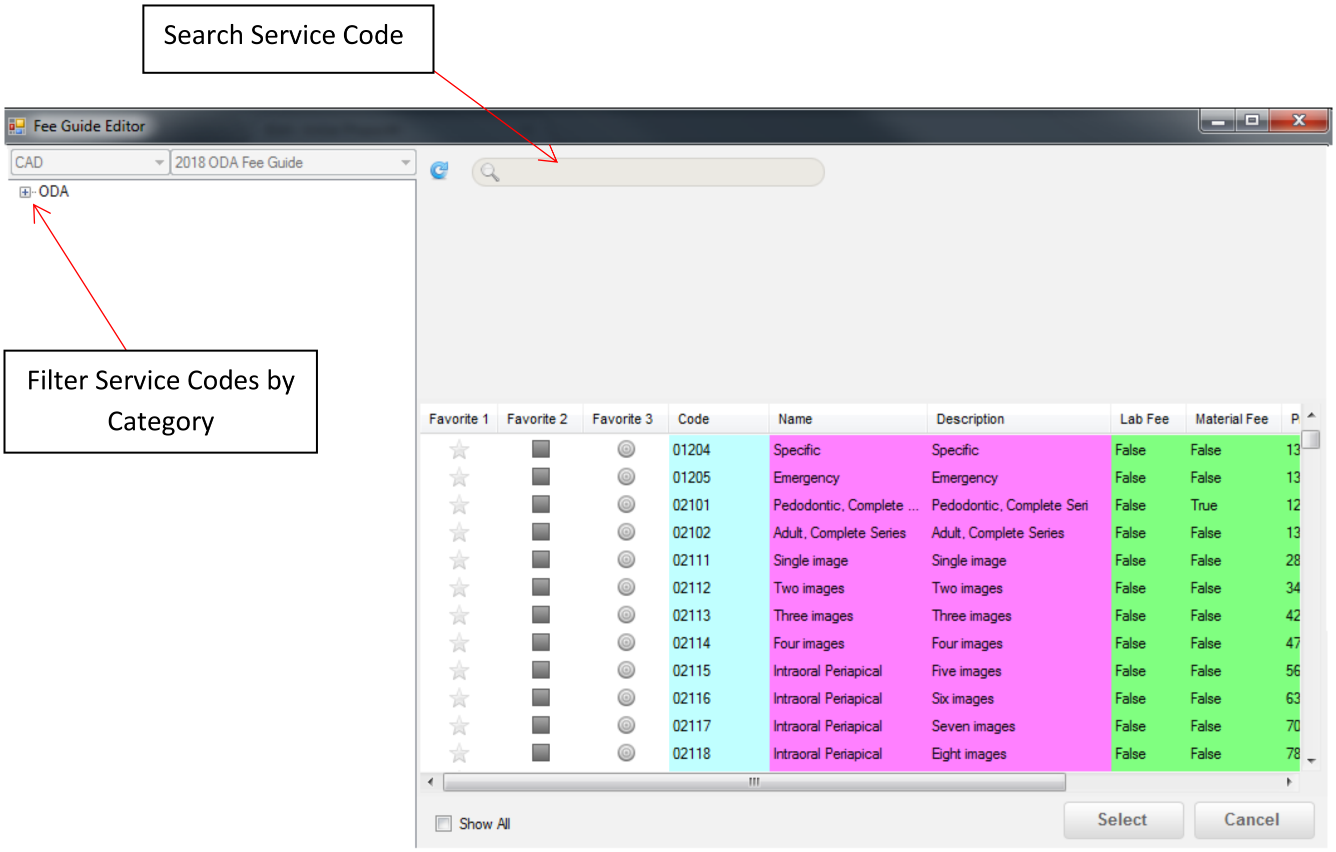
Fee Guide Editor Overview:



Treatment Planning

** Some tools may not have service codes assigned by default. Click **Search Code** to search for and assign a service code to a tool. If you know the service code, you may enter the service code and click **Save**.

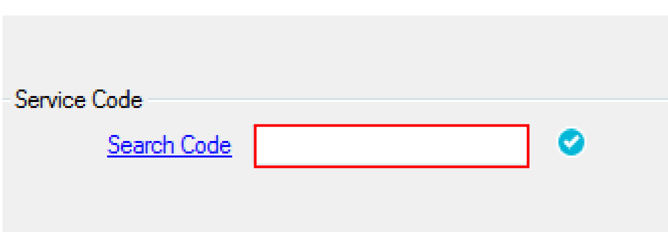
Clicking **Search Code** will prompt the window below. You can search, filter and view all service codes. To assign a service code, click the service code and click **Select**.



Creating Service Codes

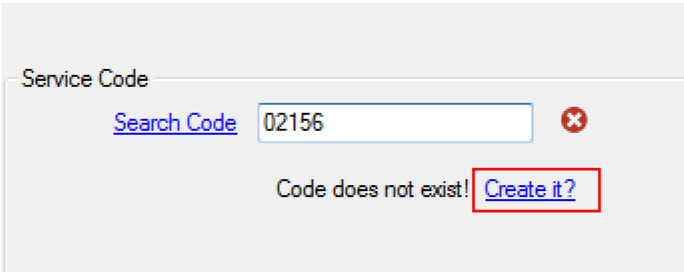
If service codes are unavailable, it can be created.

Enter the service code in the search box.

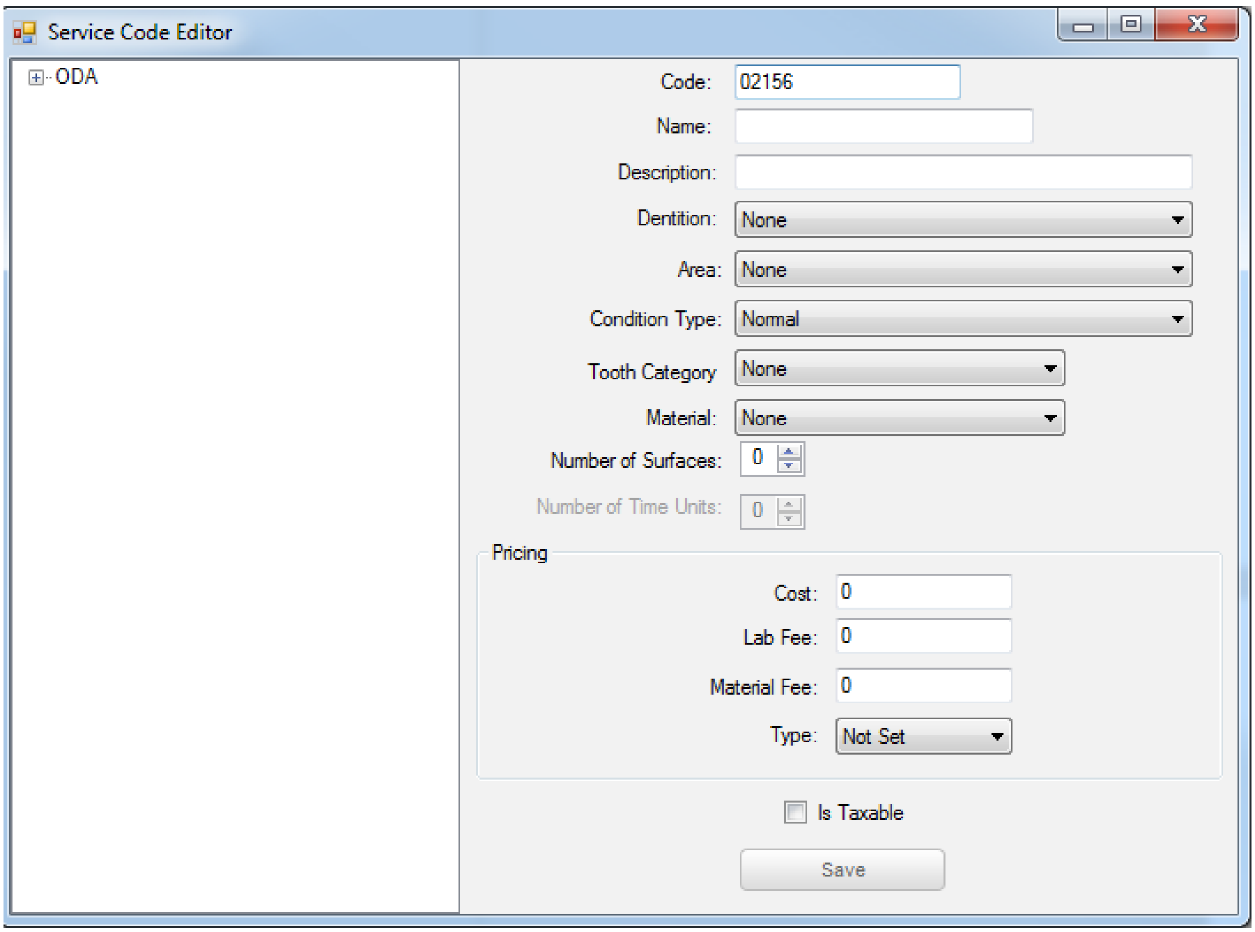


Treatment Planning

Click **Create it?**



Fill out all the information for the service code. Click **Save** when complete.

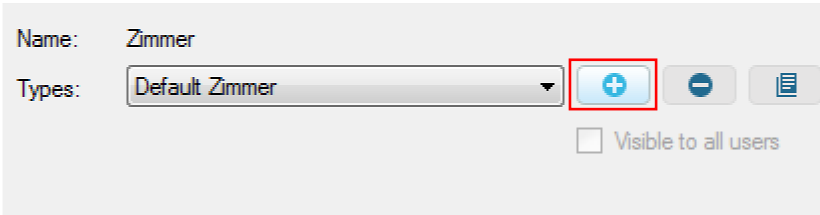


The service code has been created. It can now be attached to the tool.

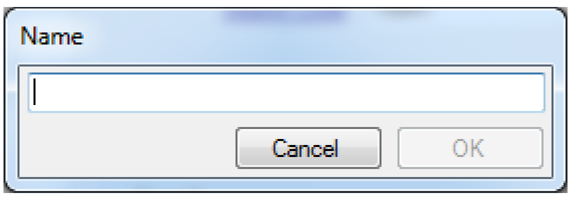
Treatment Planning

Adding and Removing Types

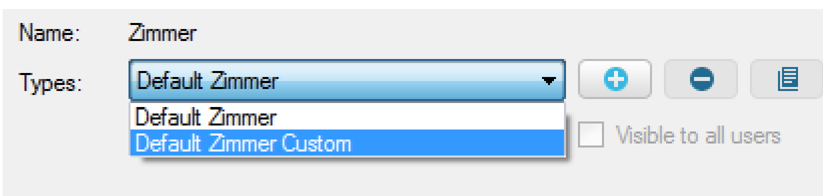
Select the tool you want to create a new type.



Enter a name for your new type. Click **OK** when complete.

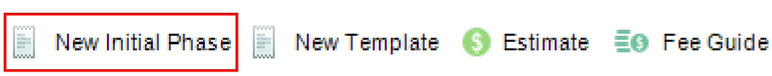


You will now see your created type from the drop-down menu for the tool.

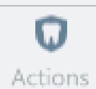


Creating Initial Phase

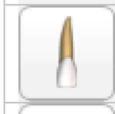
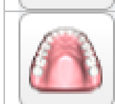
Click **New Initial Phase**.



Tool Bar Description

 Save	Saves the current state.
 Actions	Ability to Plan, Start Treatment, Print, Build Form and Quick Form.
 Undo	Undo the last action.

Treatment Planning

	Redo the last action.
	This tool will insert an adult tooth.
	This tool will insert a primary tooth.
	This tool will create a space in the mouth. It can remove the enamel or root.
	This tool will extract the tooth. Right clicking selects different options for extracting.
	This tool will allow you to select the jaw and move the teeth into it's proper location.
	Resets the entire top teeth to its original position.
	Resets the entire bottom teeth to its original position.
	Clear top row of teeth.
	Clear bottom row of teeth.

Use the tools to add or remove teeth according to the patient's mouth.

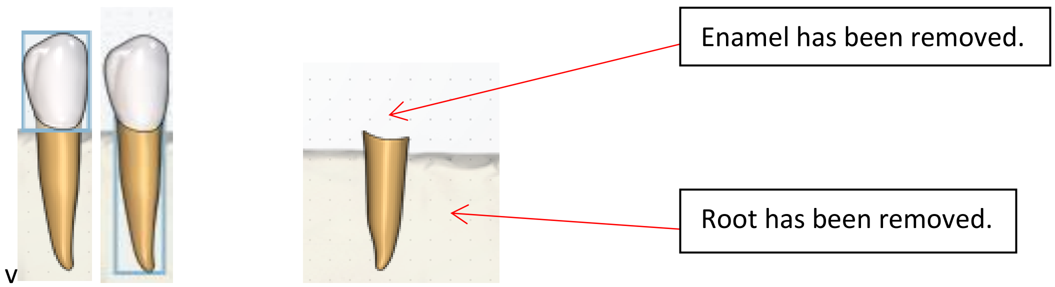
These tools work by selecting the tool and clicking the dot that appears on the tooth.

Treatment Planning

How to add a space?

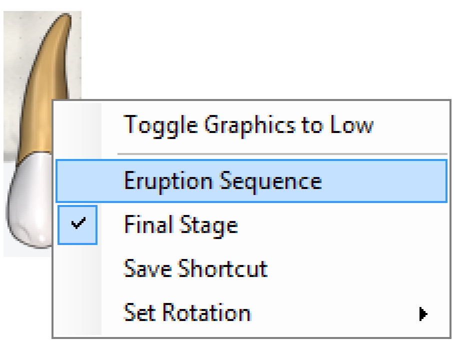
Select the space tool from the tool bar.

You can add a space to the enamel or root by clicking the enamel or root.



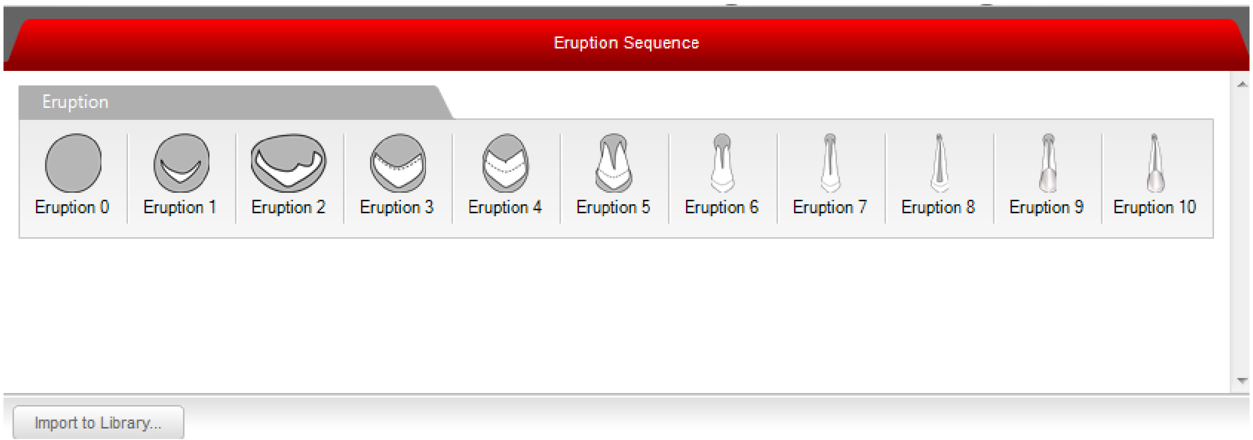
Eruption Sequence

Right click the root of the tooth and select **Eruption Sequence**.

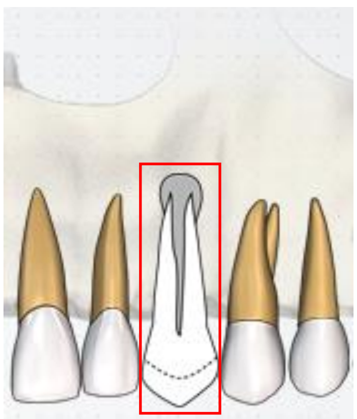


Double click the eruption sequence number for that tooth.

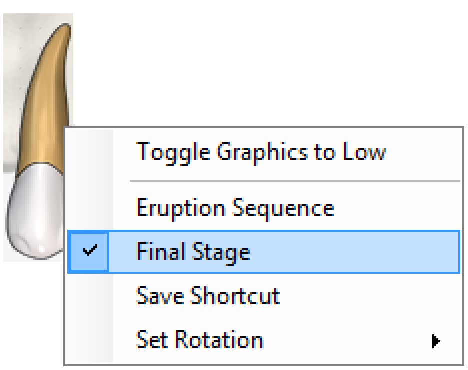
Treatment Planning



The eruption sequence has been applied to that tooth.



Complete the eruption sequence for all remaining teeth if necessary. You can change the eruption sequence number each time the patient visits in the same manner as applying the eruption sequence to a tooth.
If the tooth has fully erupted, right click the tooth and select **Final Stage**.

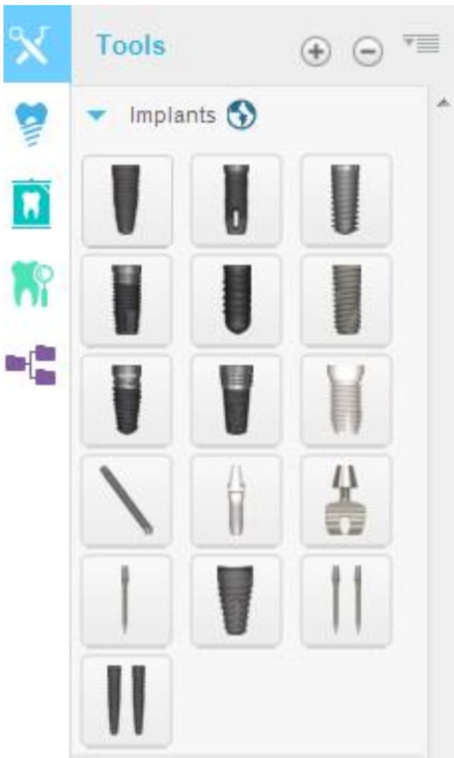


Treatment Planning

How to use tools?

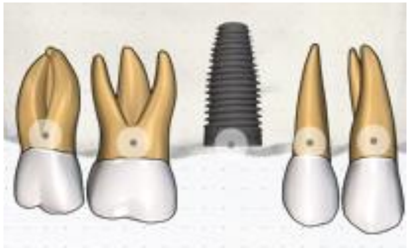
Click the expand button to expand all the tools.

Select the tool you wish to use.



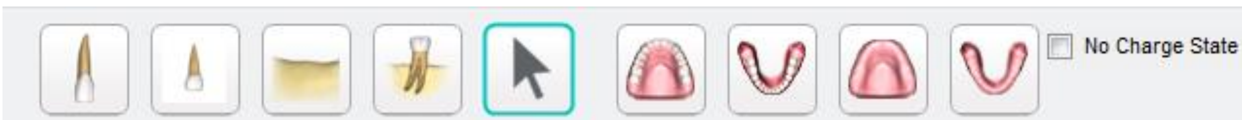
You will see a dot appear on the tooth or jaw. Click the dot to use the tool on that tooth or jaw. Some tools require you to extract or provide space to the tooth.

Treatment Planning

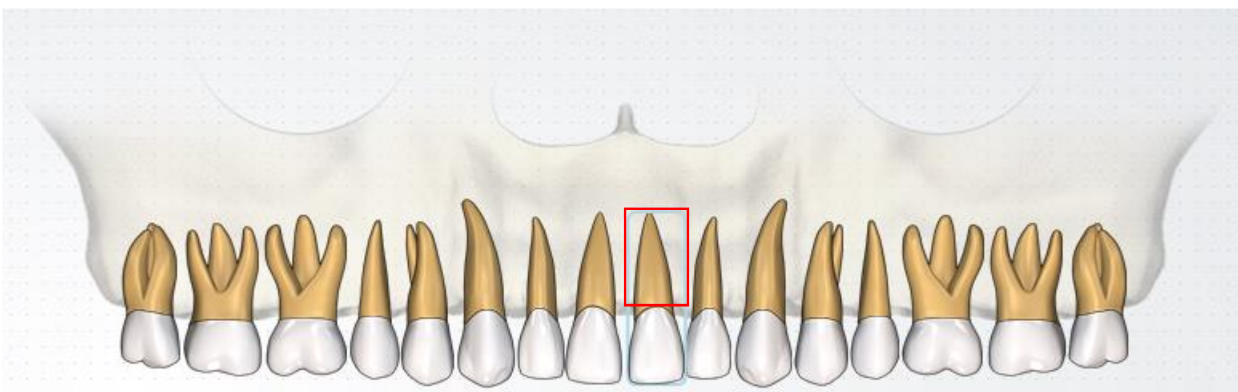


Changing Tooth Position

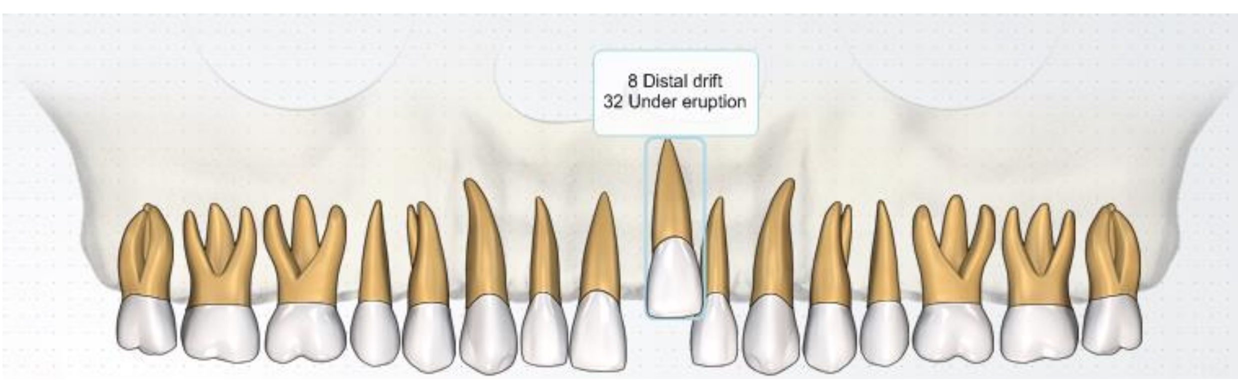
Click the arrow tool.



Click the tooth's root you want to move.

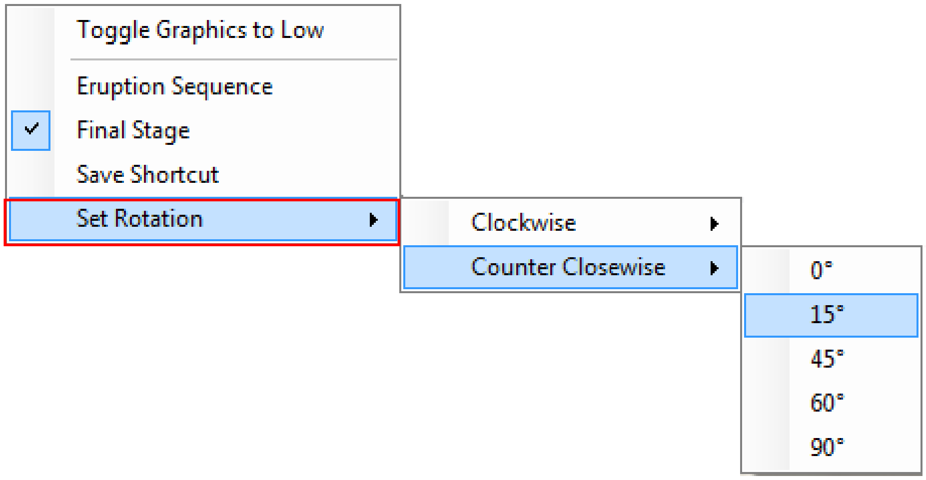


Click and drag the tooth into position.

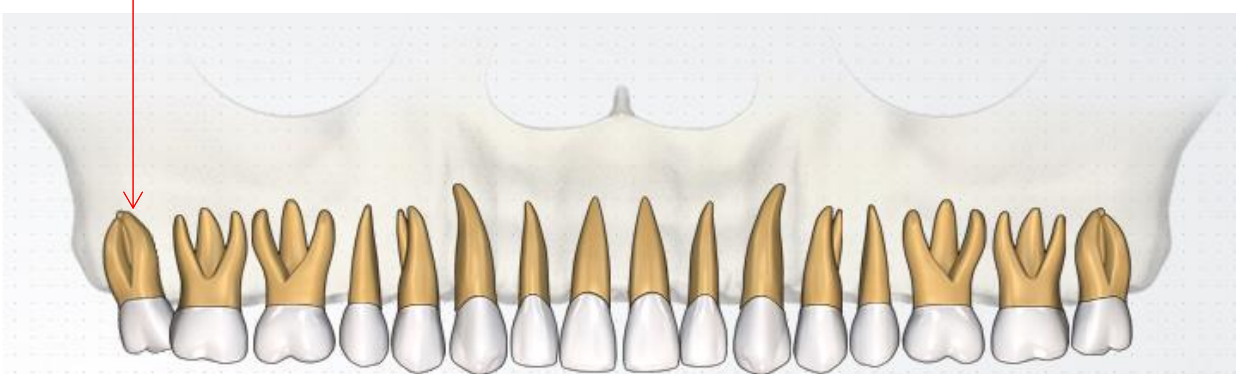


You can also rotate the tooth if necessary. Right click the tooth's root and select **Set Rotation**.

Treatment Planning

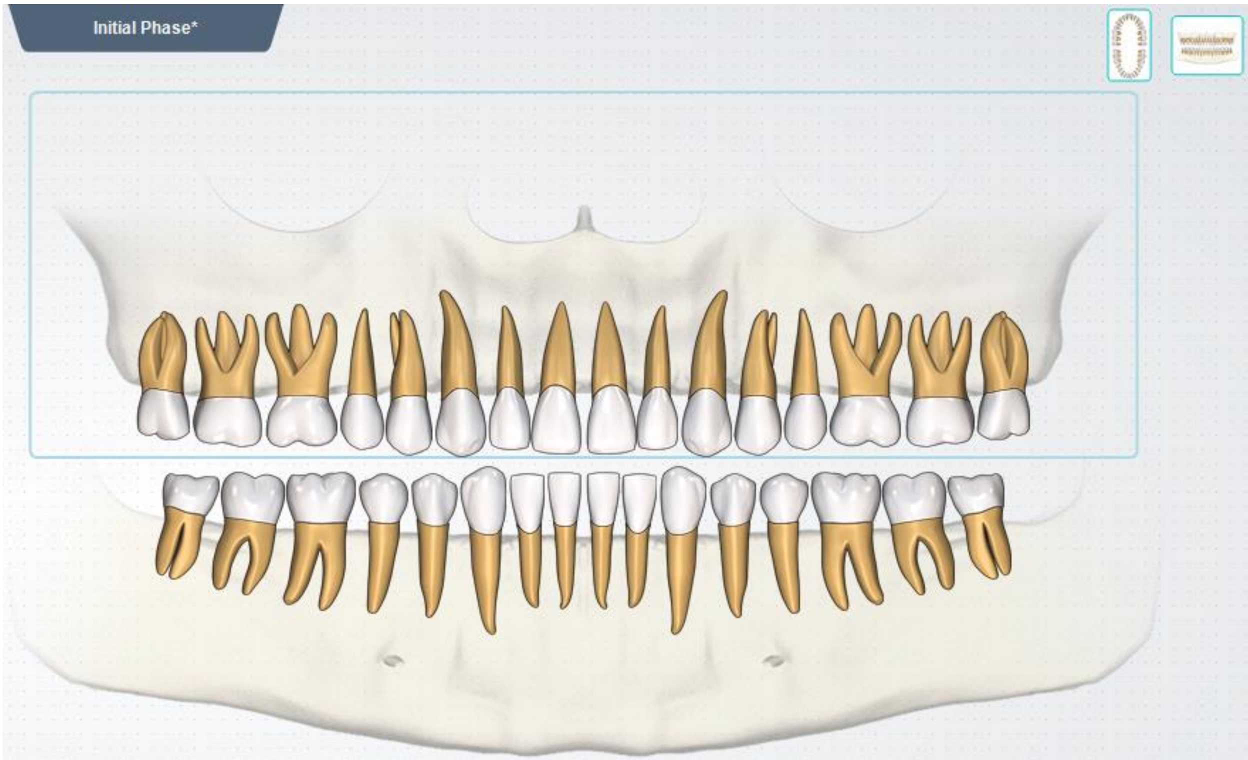


This tooth has been rotated counter clockwise by 15 degrees.



You can also move the upper and lower jaw in the same fashion as moving a tooth.

Treatment Planning

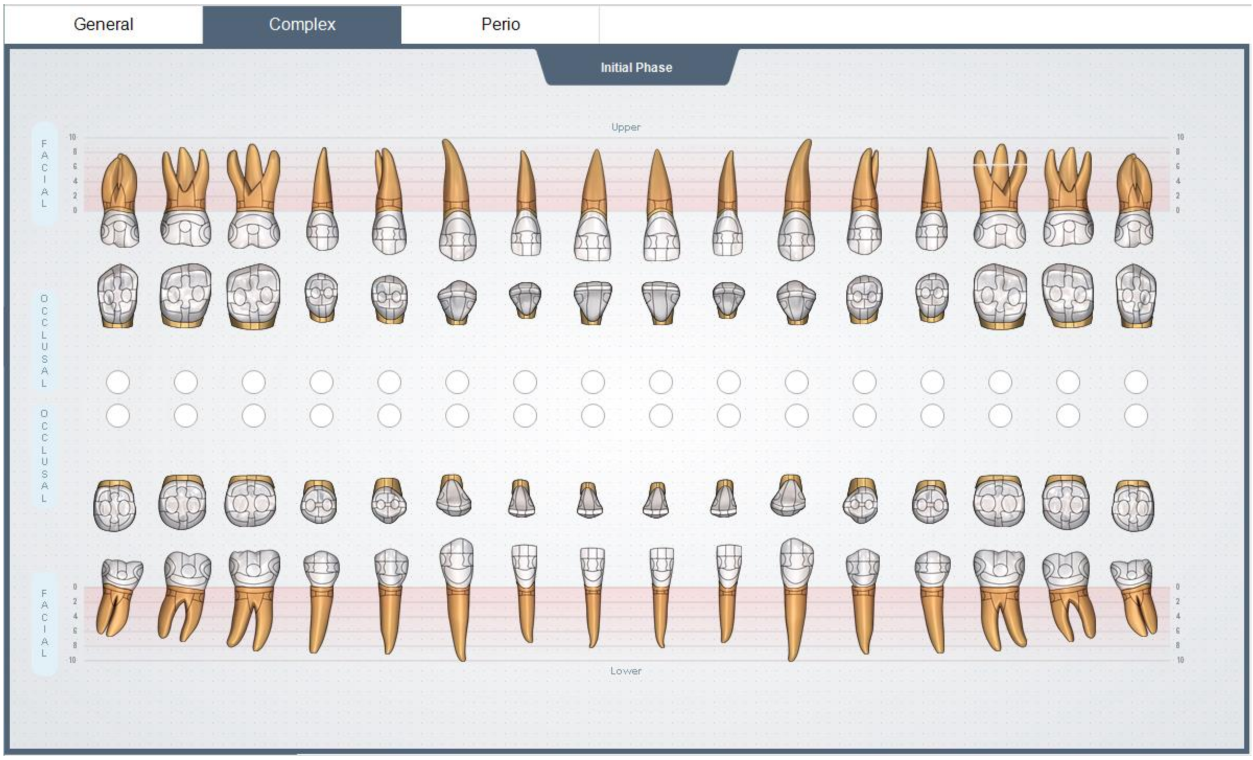


Setting the tooth’s rotation with this method only allows changing the tooth’s rotation at fixed intervals. If you require rotating the tooth outside of these intervals, please follow the directions below.

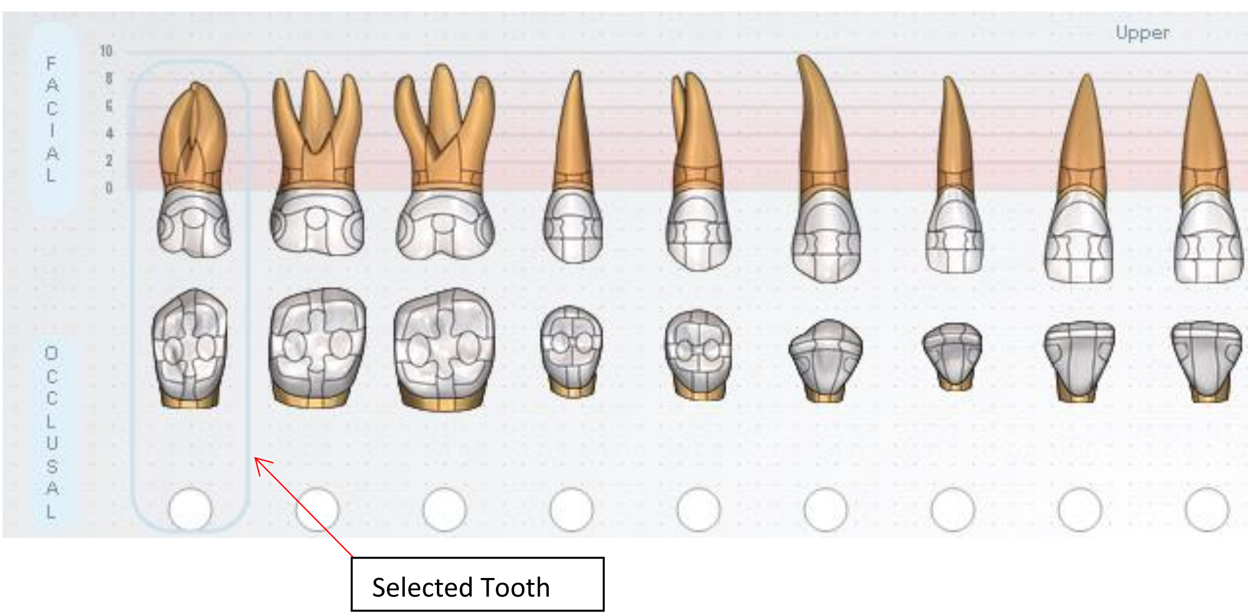
Click the **Complex** view.

Treatment Planning

You will see the following view:

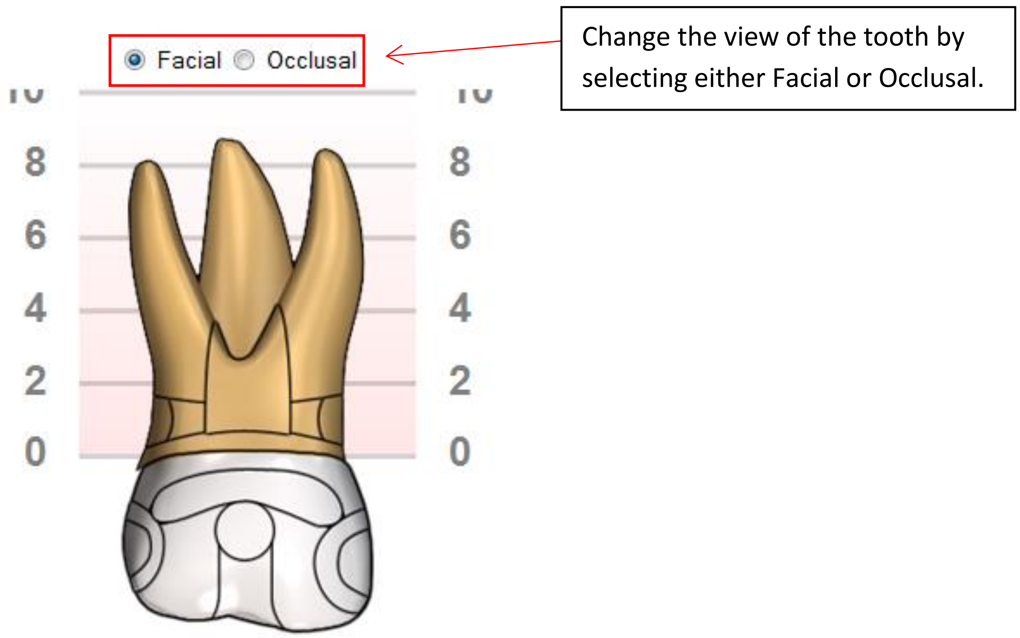


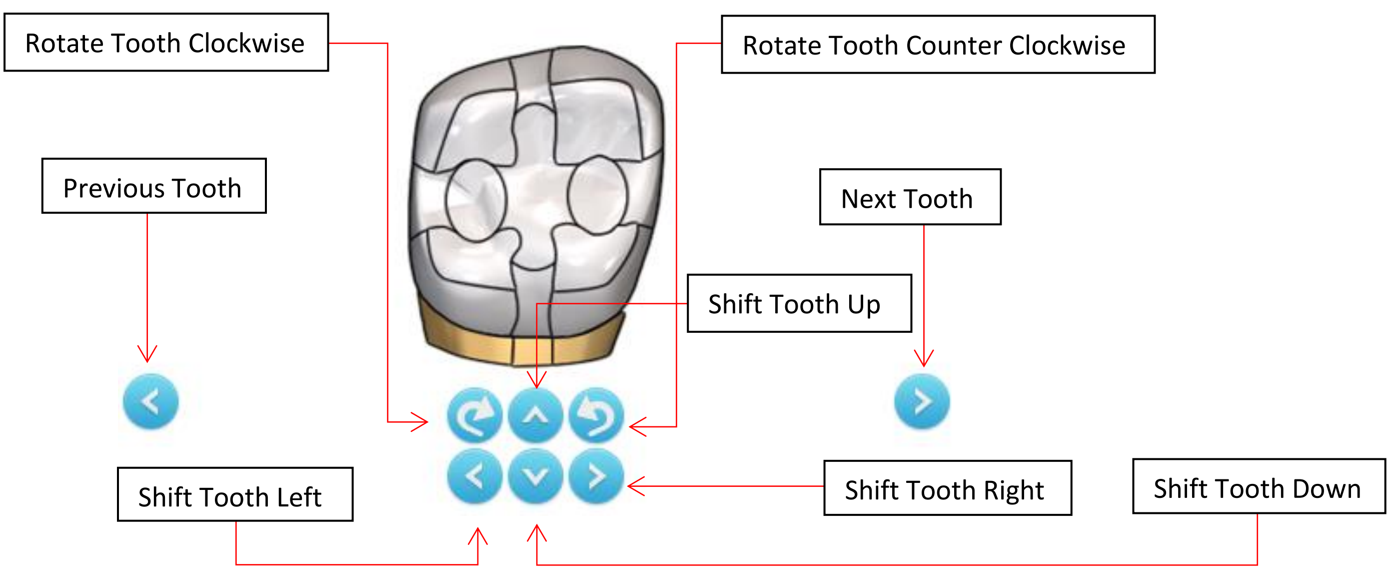
Select the tooth you want to rotate.



Use the tools to rotate and shift the tooth.

Treatment Planning



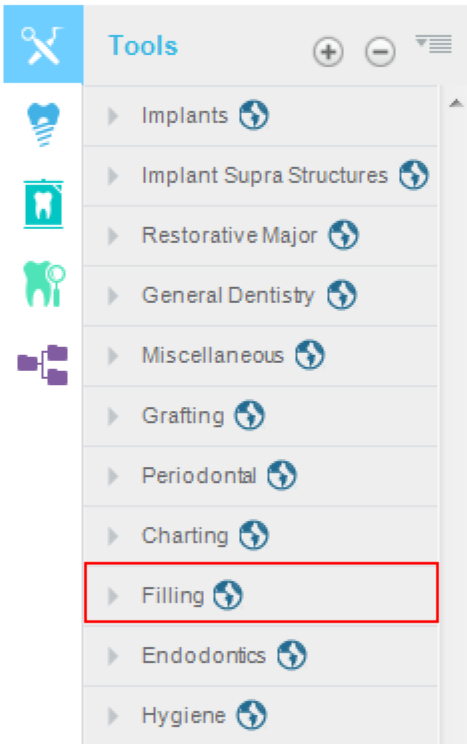


Treatment Planning

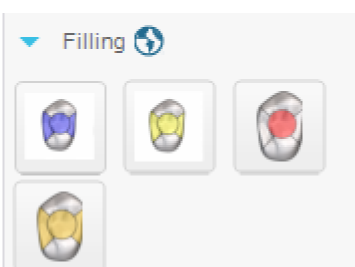
Fillings

Click the **General** view.

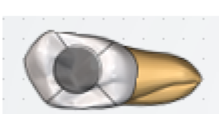
Expand the Filling Tools.



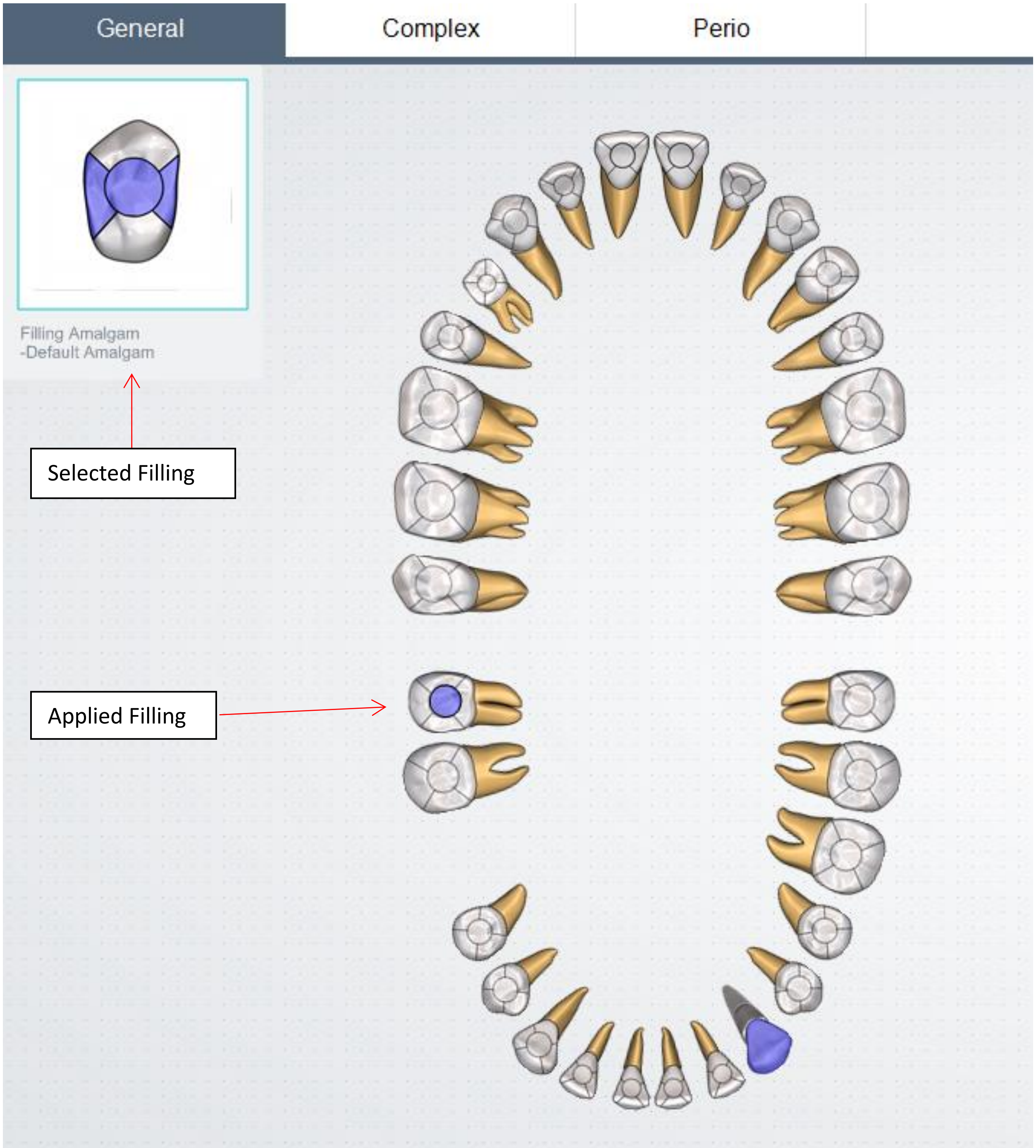
Select your appropriate filling.



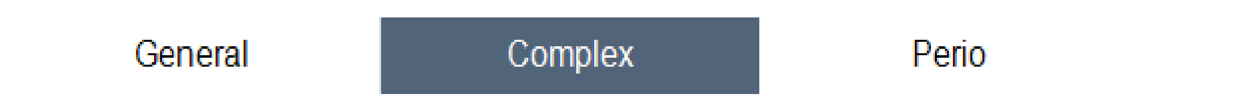
Click the tooth surface for the filling.



Treatment Planning

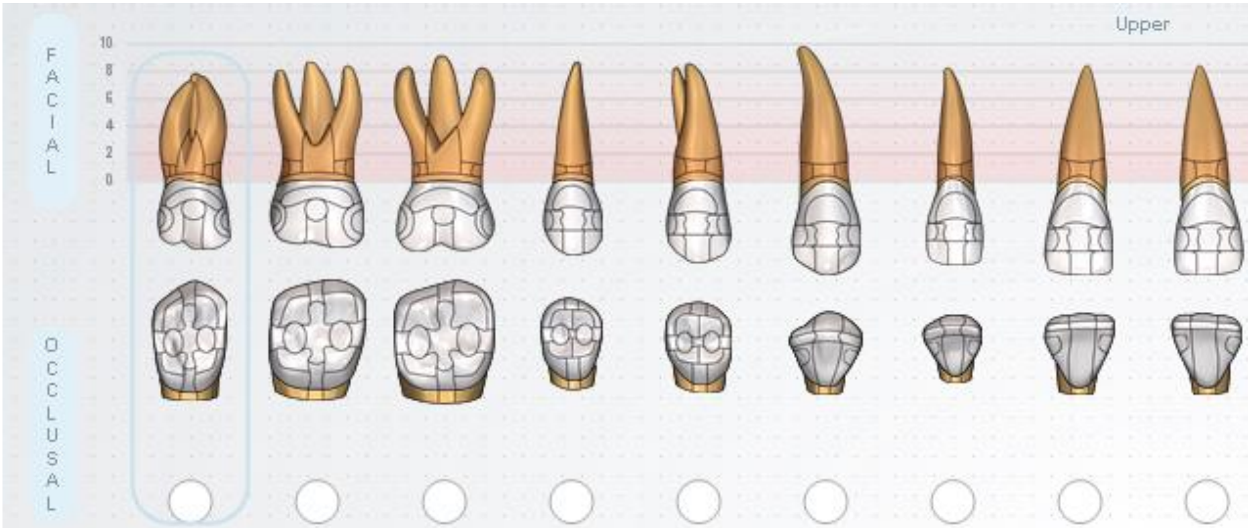


If you require more tooth surfaces, click the **Complex** view.

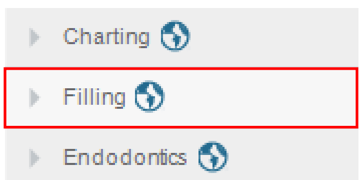


Treatment Planning

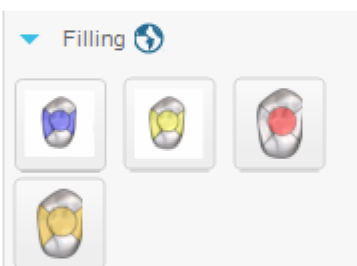
Select the tooth you want to apply fillings.



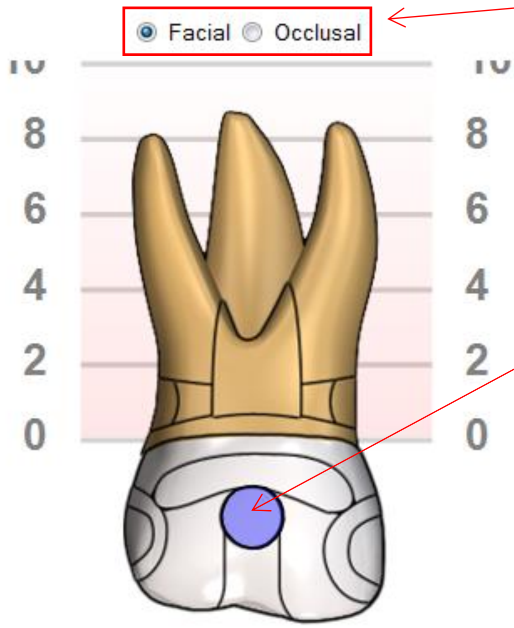
Expand the Filling Tools.



Select your appropriate filling.

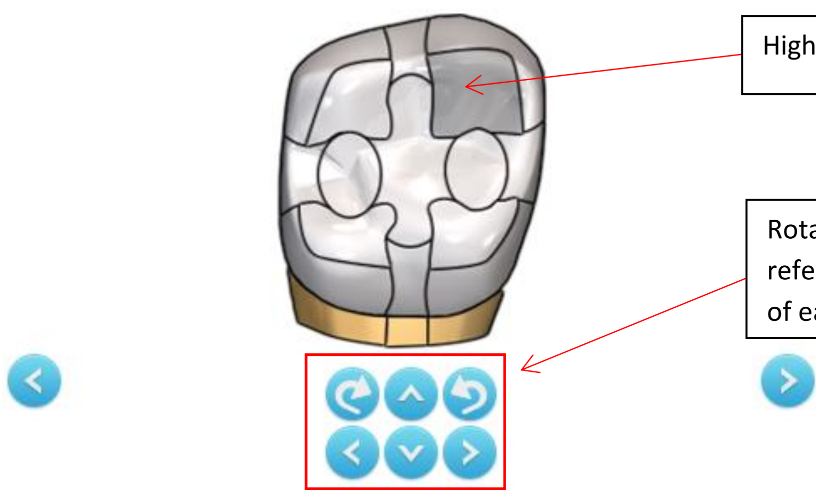


Treatment Planning



Change the view of the tooth by selecting either Facial or Occlusal.

Click the tooth surface to apply the filling. The colour will reflect the selected filling.



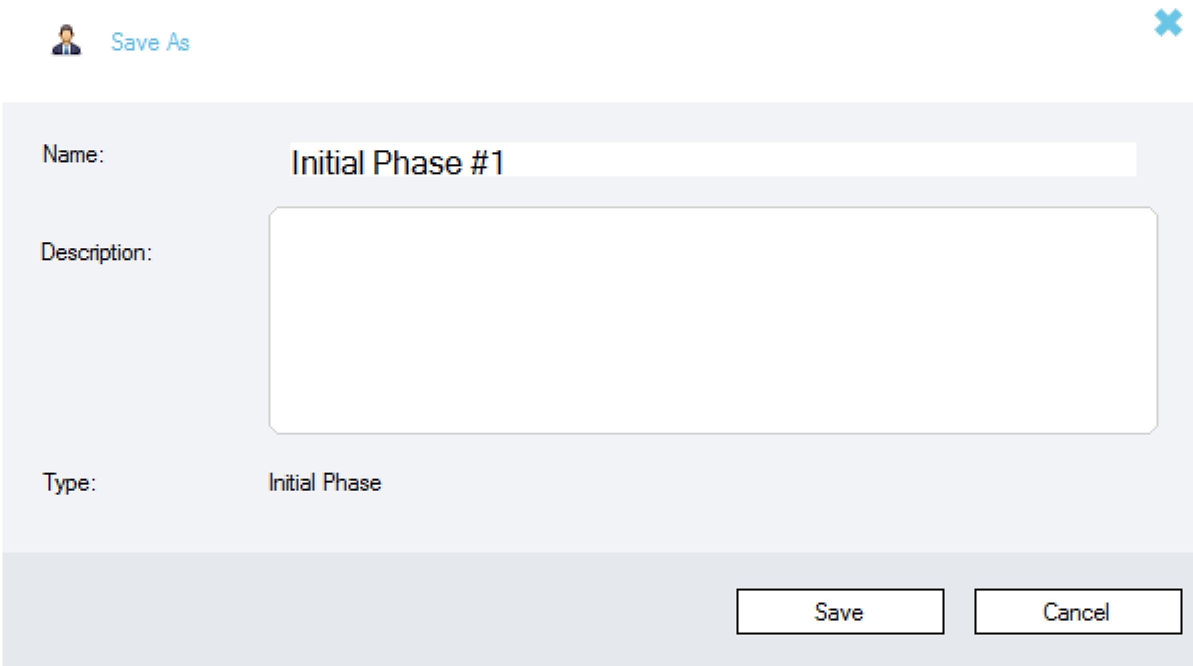
Highlighted tooth surface

Rotating and shifting tools. Please refer to page 168 for descriptions of each button.

Click **Save** when complete.

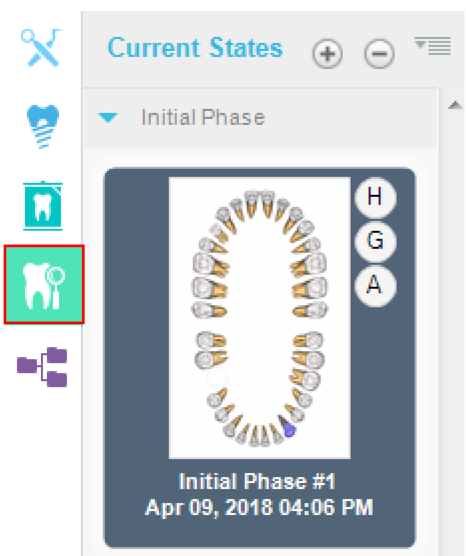
Enter a description for the Initial Phase (optional). This is a summary of the Initial Phase.
Click **Save** when complete.

Treatment Planning



Perio

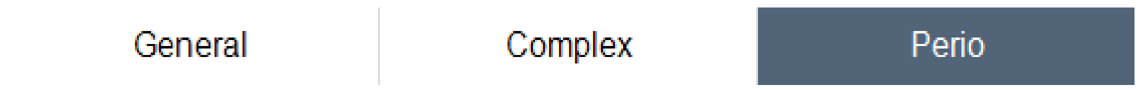
Click **Current States** and select an Initial Phase**.**



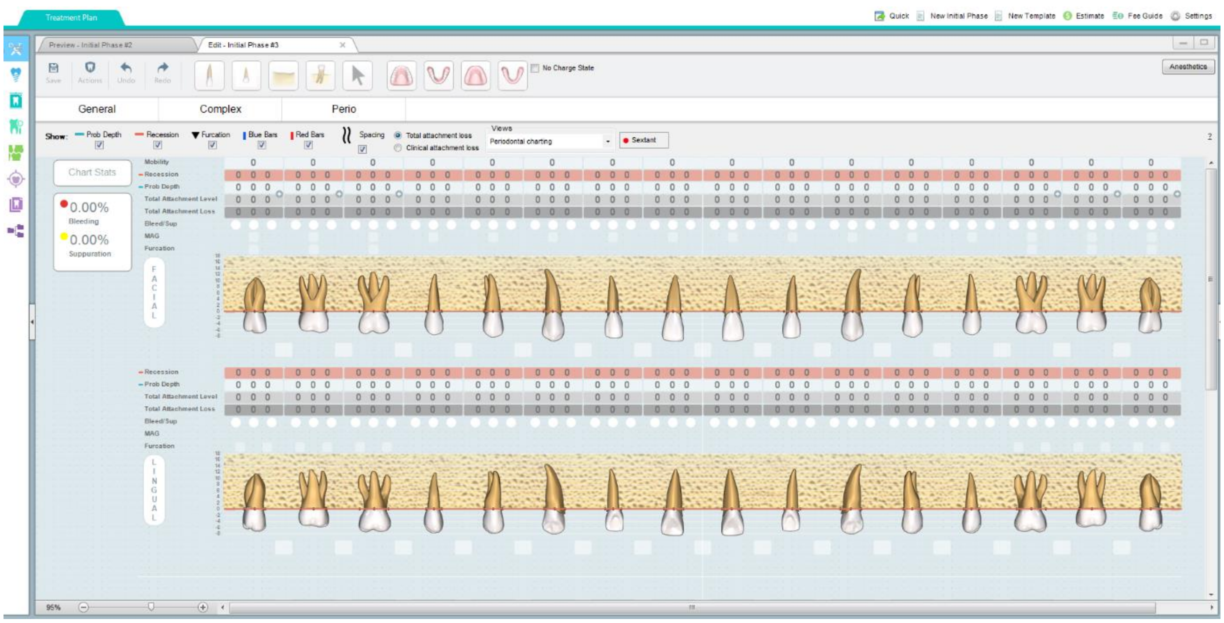
Treatment Planning

Click the **Edit** button.

Click the **Perio** View.

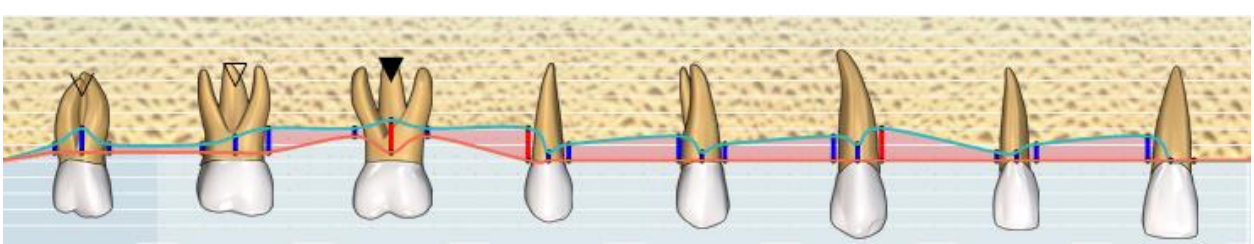


Perio Overview:



The following filters can be displayed by checking the box under the name. All boxes are checked by default. If you do not want to display a function, uncheck the box under the name.

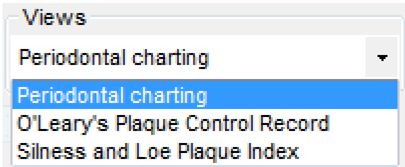
It will display the following functions in a line graph over the tooth.



Treatment Planning

Periodontal Charting View

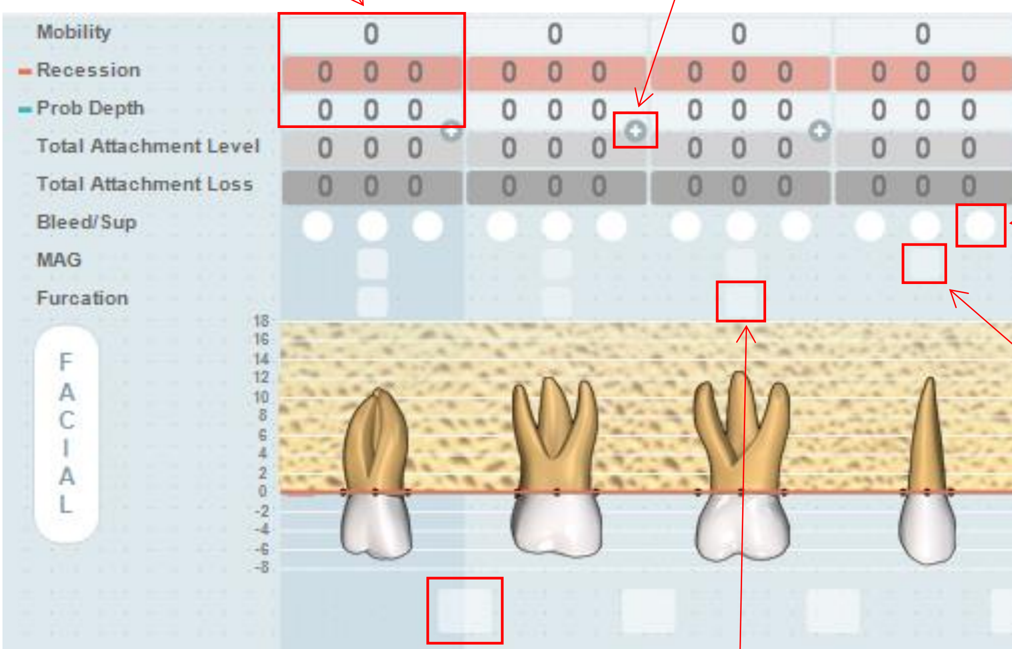
Select Periodontal Charting from the drop-down menu.



Enter the numbers for Mobility, Recession and Prob Depth.

Click this button to change the points from 3 to 6.

Click to indicate bleeding and suppuration. Red circles indicate bleeding. Yellow Circles indicate Suppuration. Orange circles indicate both.



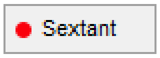
Click to enable MAG.

Click this drop-down menu to select spacing.

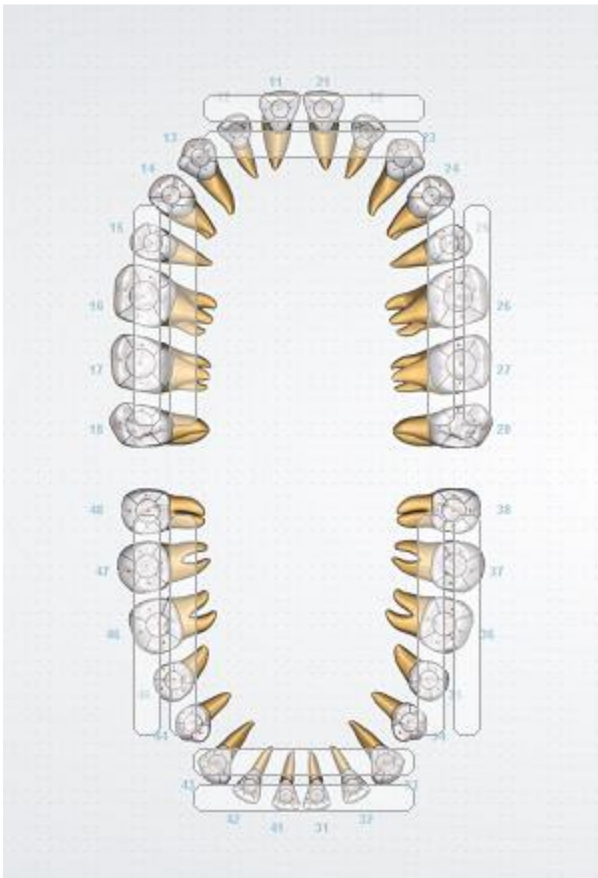
Click to implement Furcation. It can be clicked up to four times for different levels of Furcation.

Treatment Planning

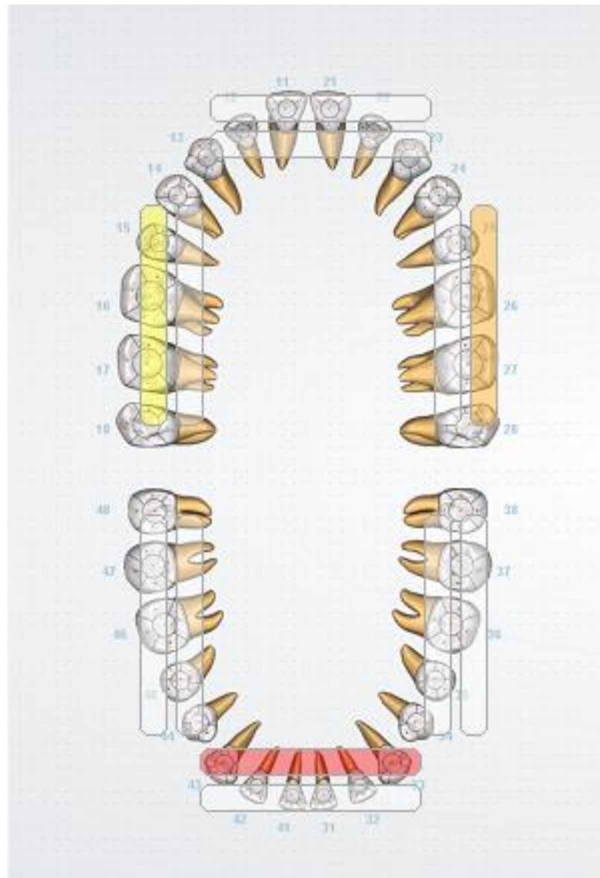
If you want to apply bleeding, suppuration or both to sextants, click the **Sextants** button.



Click the sextant to apply bleeding, suppuration or both.



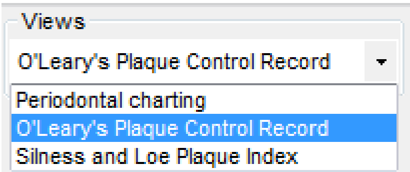
The following sextants have been applied with bleeding suppuration and both.



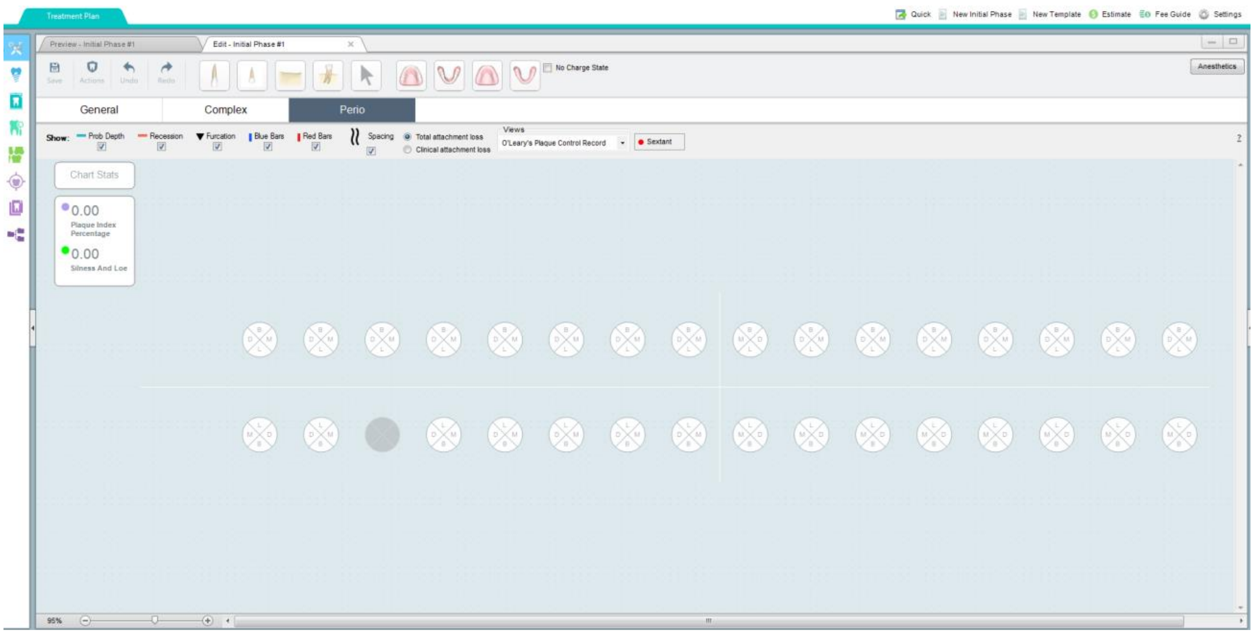
Treatment Planning

O'Leary's Plaque Control Record

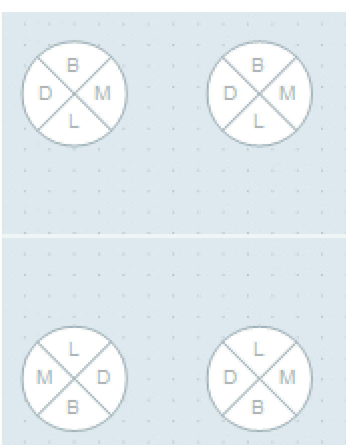
Select O'Leary's Plaque Control Record from the drop-down menu.



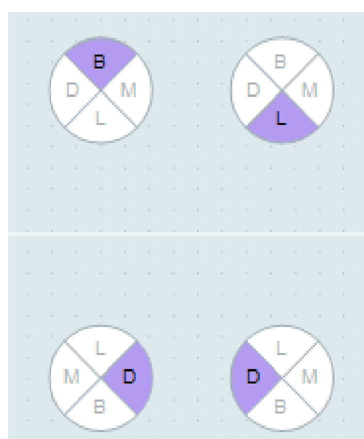
O'Leary's Plaque Control Record Overview:



Click the quadrant to apply plaque.



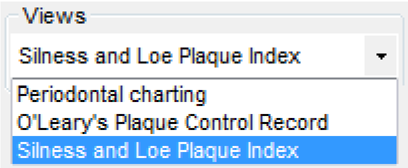
The applied plaque will display in a purple colour.



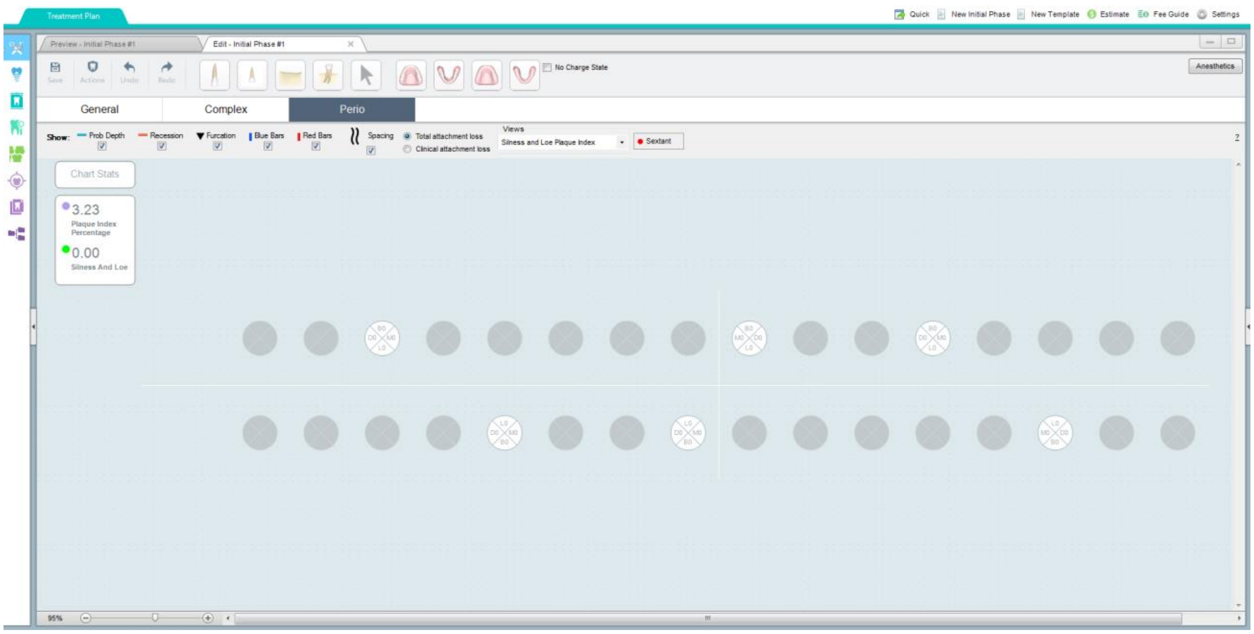
Treatment Planning

Silness and Loe Plaque Index

Select Silness and Loe Plaque Index from the drop-down menu.



Silness and Loe Plaque Index Overview:

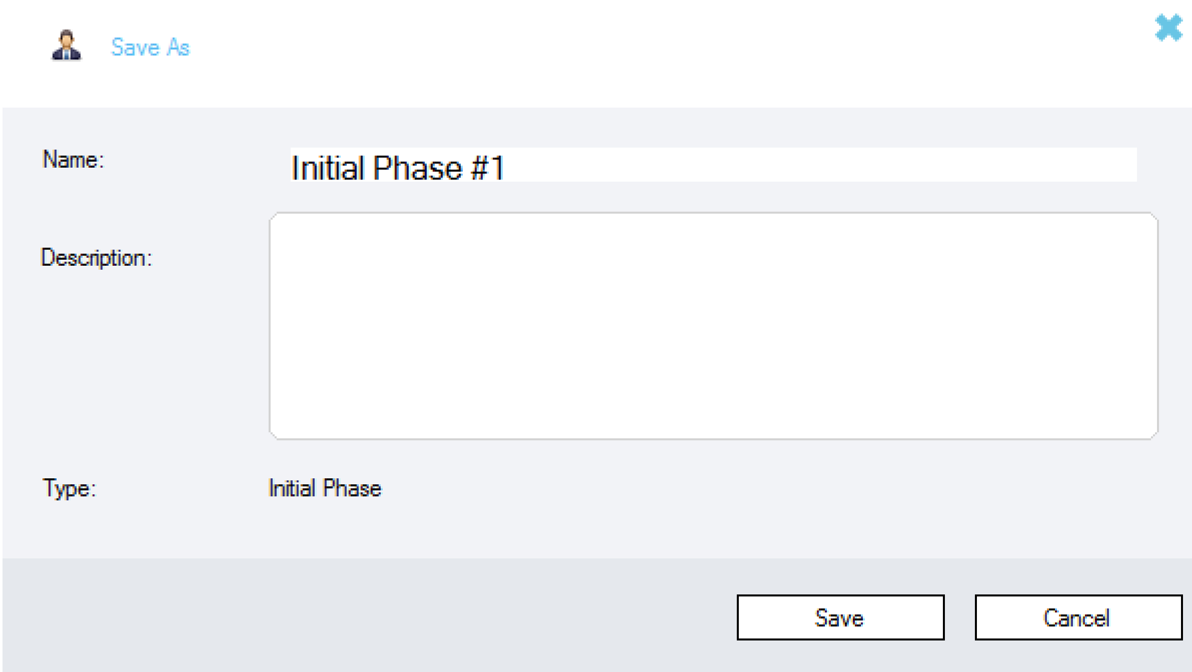


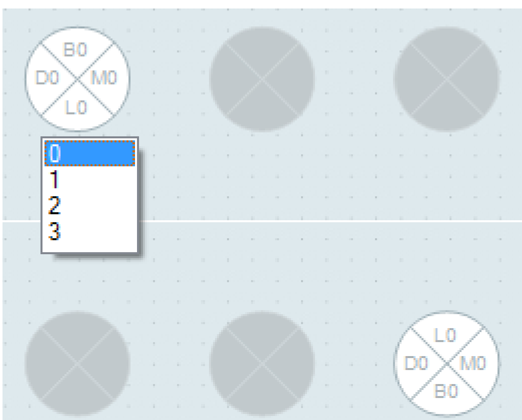
Click the quadrant you would like to apply Silness And Loe. Select the level of Silness and Loe from the drop-down menu.

After you have completed Perio, click **Save**.

Enter a description for the Initial Phase (optional). This is a summary of the Initial Phase. Click **Save** when complete.

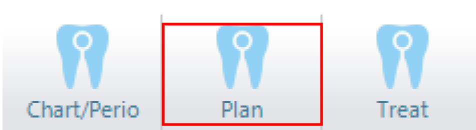
Treatment Planning





Creating a Treatment Plan

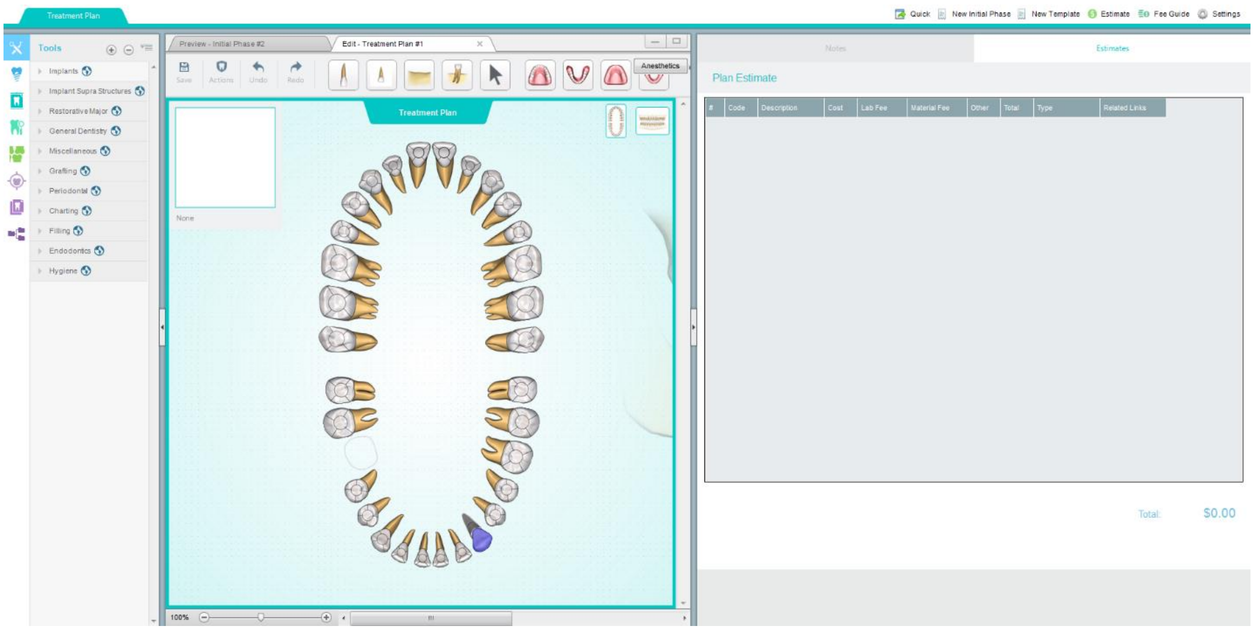
Click the **Plan** button.



Click **New Treatment Plan** to create a new Treatment Plan.

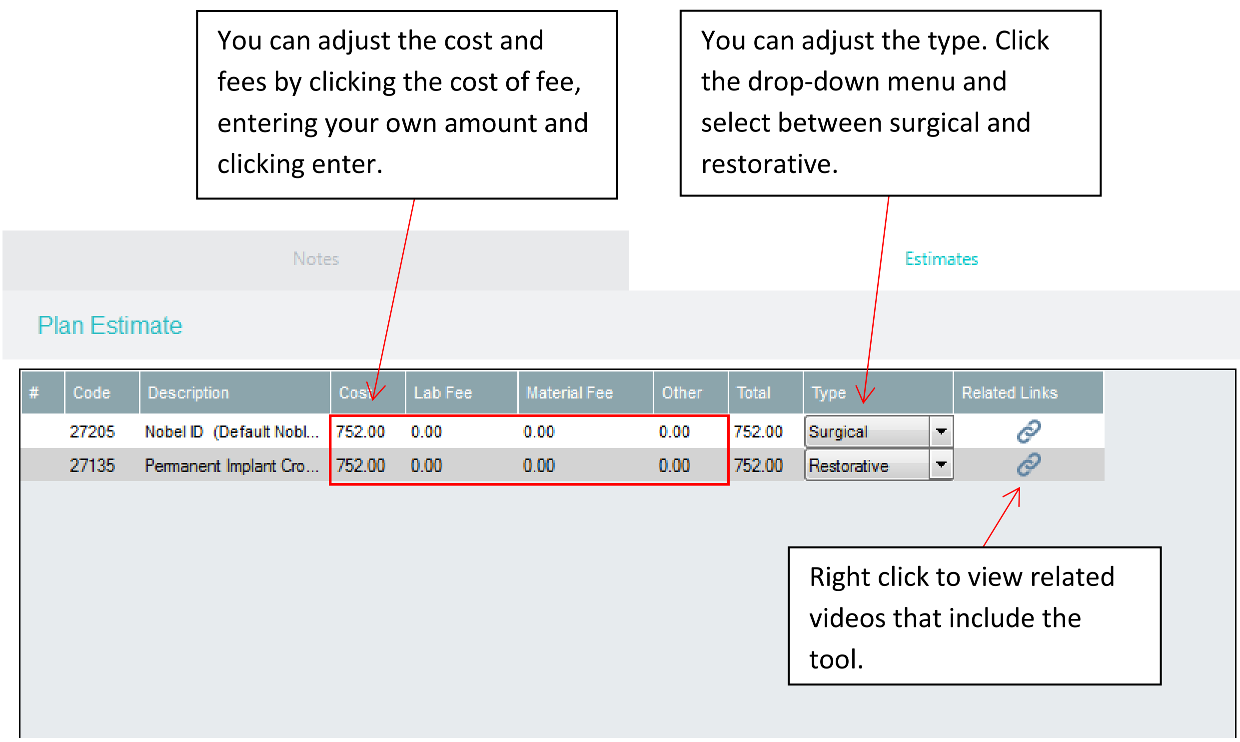
Treatment Plan Overview:

Treatment Planning



Use the tools from the left pane to add your necessary tools for your treatment plan. Refer to **How to use tools?** for information on how to use tools.

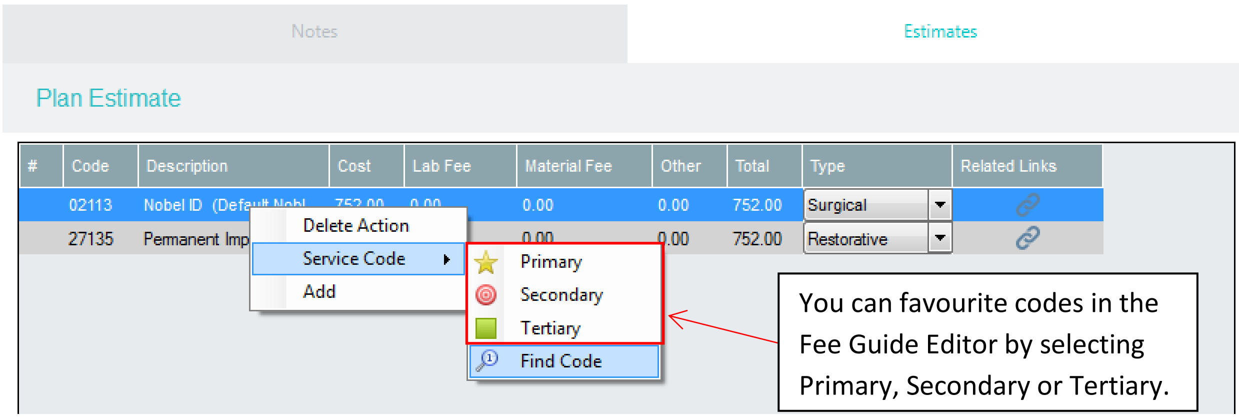
The right pane will populate with the fees per tool.



Treatment Planning

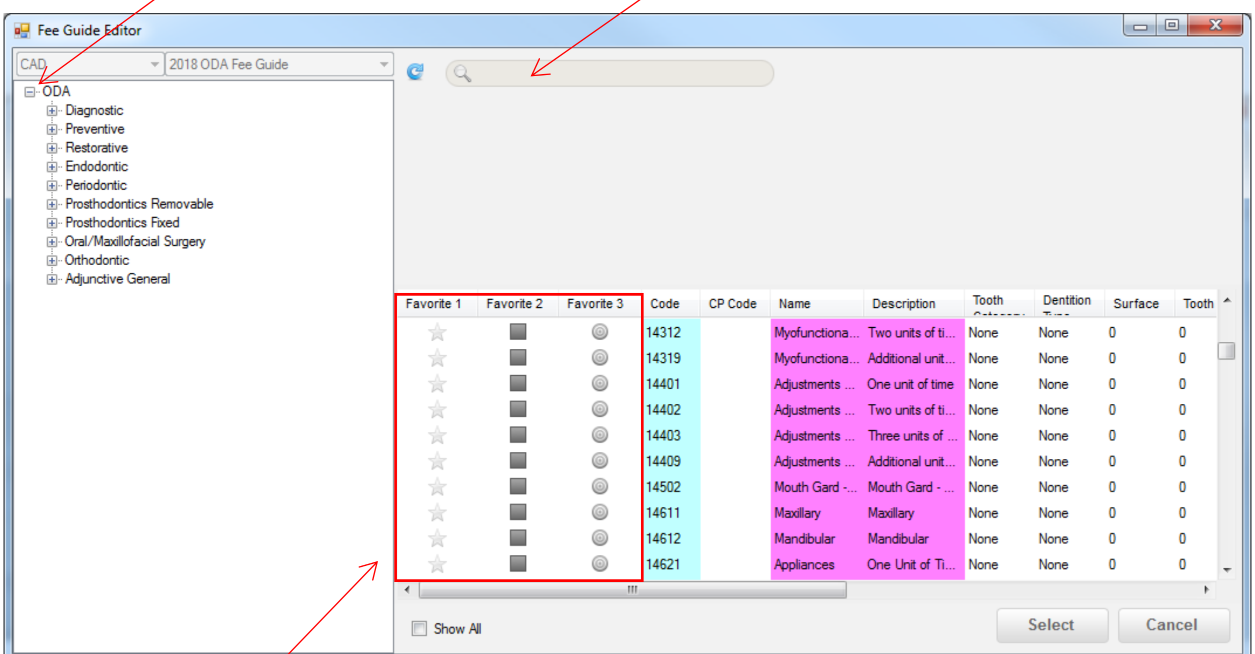
Changing the Assigned Dental Code (e.g. CDT, ODA)

Right click the tool in Plan Estimate, click **Service Code** and select **Find Code**. You can also click on the Notes tab to enter notes.



Expand to search for dental codes filtered by category.

Enter the dental code here to search for results.

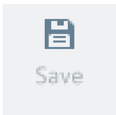


You can favourite dental codes by clicking the star, square or circle.

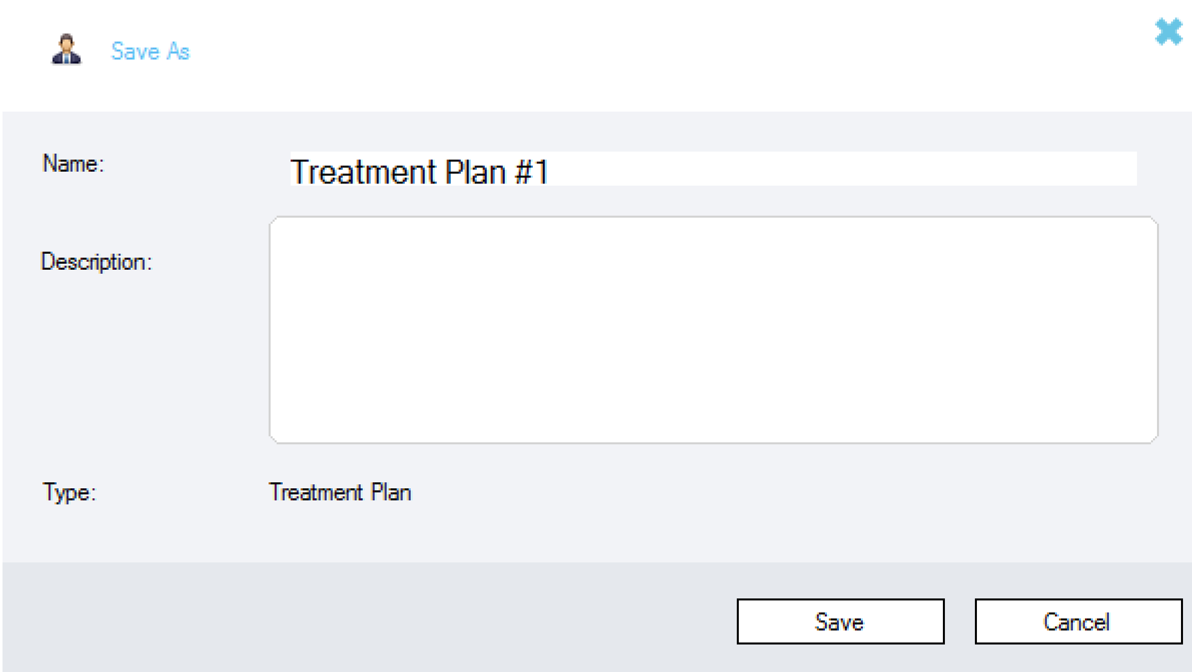
Treatment Planning

After you have found the code, click the row of the code and click **Select**. The code has now been changed.

After you have completed your treatment plan, click **Save**.



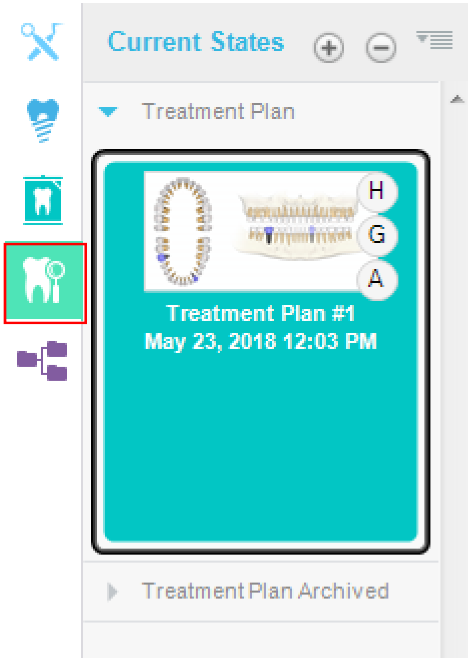
Enter a description for the Treatment Plan (optional). This is a summary of the Treatment Plan. Click **Save** when complete.



Treatment Planning

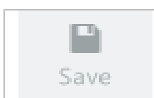
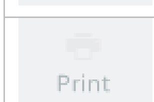
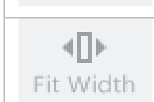
Building a Form

Click **Current States** and select a Treatment Plan**.**

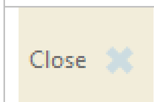
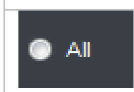
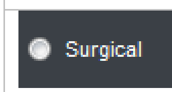


Click the **Build Form** button.

Buttons Overview:

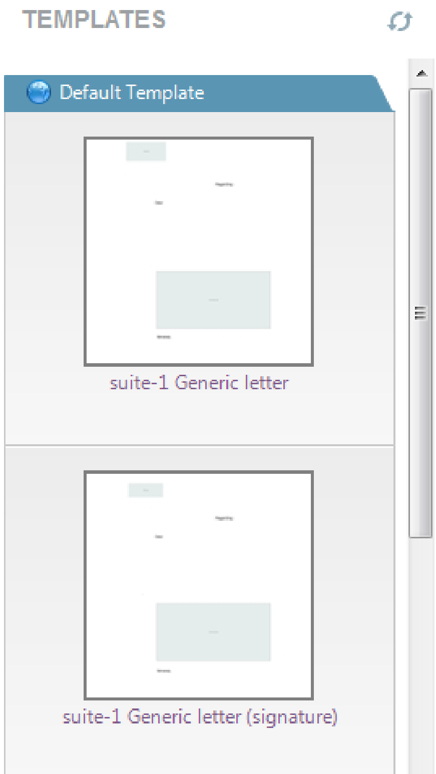
	Saves the treatment form and invoice.
	Zooms in on the form.
	Zooms out of the form.
	Prints out the form and invoice
	Resizes canvas to fit the width of the entire window.

Treatment Planning

	Resizes canvas to fit the height of the entire window.
	Refreshes the template list.
	Exits the Estimate Form Builder.
	Change the treatment image view in the form by clicking the forward and back arrows.
	Surgical and Prosthetic invoices are on one page.
	Surgical and Prosthetic invoices are on two different pages.
	Surgical invoice is displayed only.
	Prosthetic invoice is displayed only.

Double click one of the templates you would like to build the form.

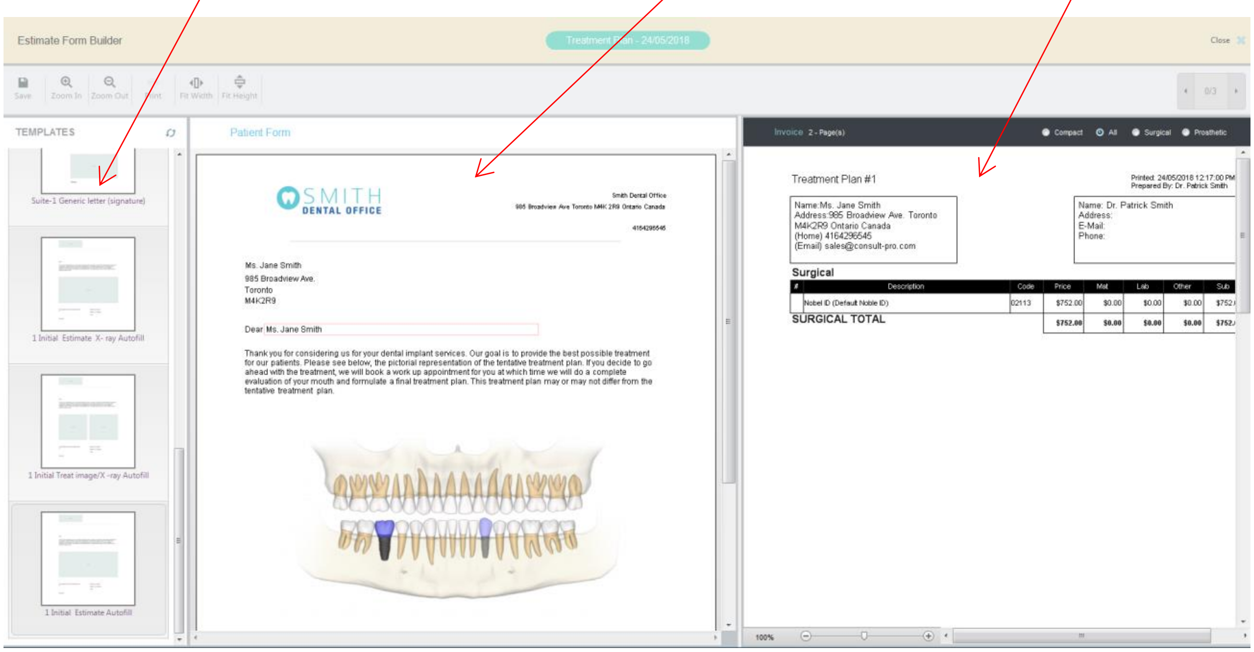
Treatment Planning



Choose from one of the treatment planning templates.

The form will auto populate with the treatment image and cost.

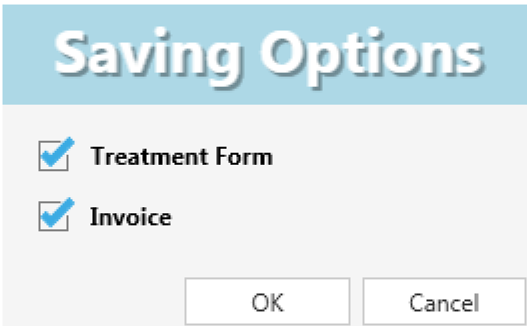
Invoices



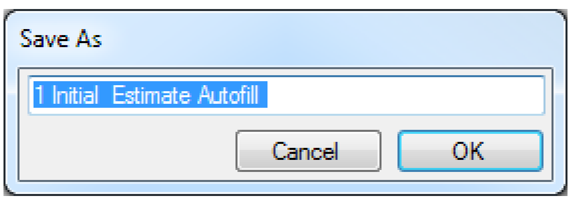
Treatment Planning

Click **Save** when complete.

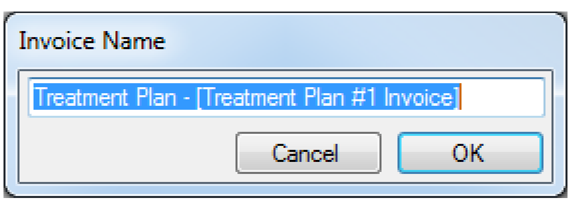
Choose what you would like to save.



By default, the name of the completed form is the name of the template. You can change the name of the completed form by entering your own title in the text box. Click **OK** when complete.



You can change the name of the invoice by entering your own title in the text box. Click **OK** when complete.



The forms and invoices can be found in **Documents.**

Treatment Planning

Creating a Treatment

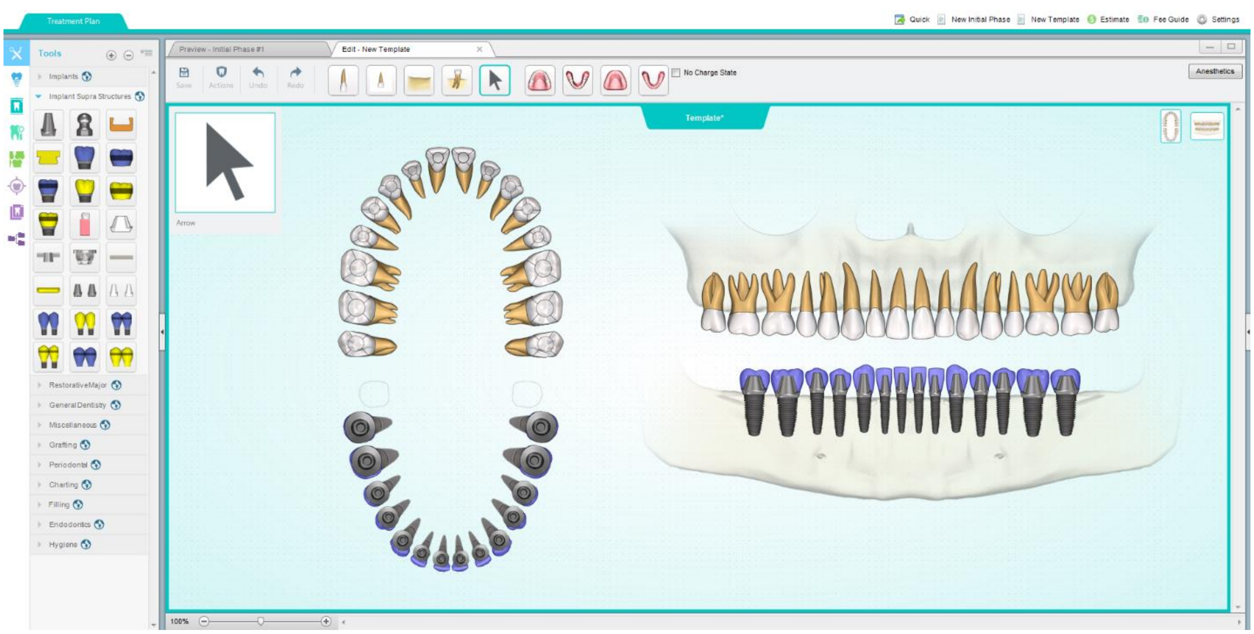
Click the **Treat** button.

Complete the treatment using the tools in the same fashion as creating an Initial state and Treatment Plan. Refer to **How to use tools?** for information on how to use tools. You may have to create multiple treatments based on the complexity of your treatment plan. Treatments are what procedures have been completed on your patient and correspond to the treatment plan.

Creating a Treatment Template

Treatment templates are templates of treatments you use frequently.

Create the treatment template using the tools in the same fashion as creating an Initial State and Treatment Plan. Refer to **How to use tools?** for information on how to use tools.

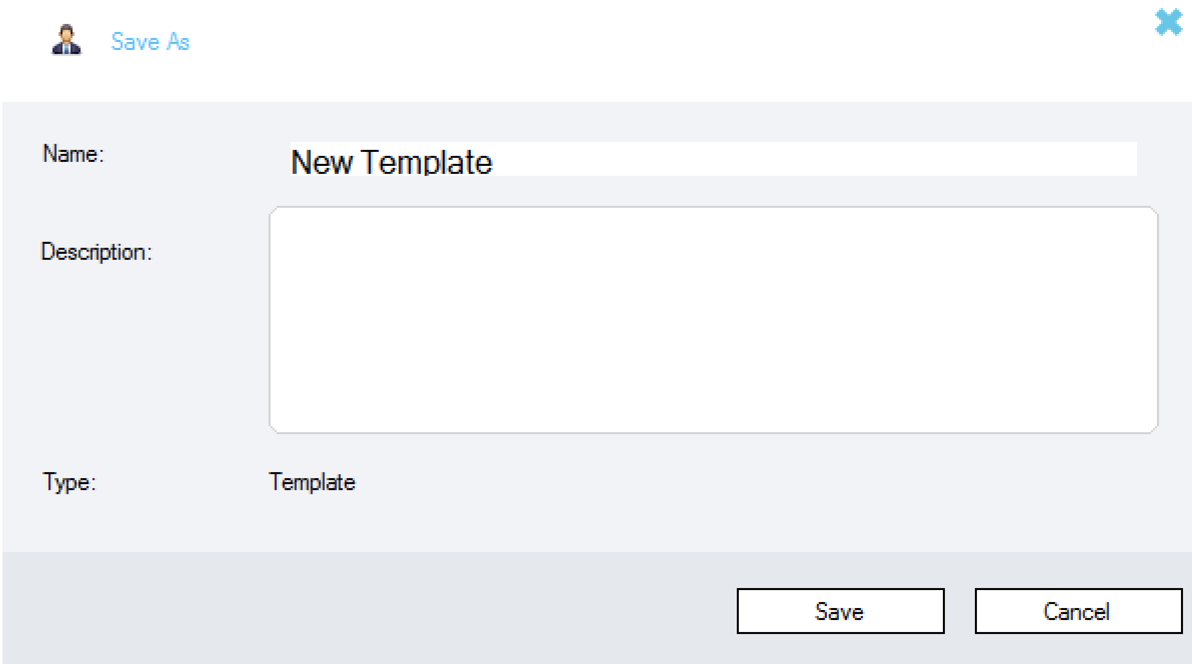


Click **Save** when complete.

Treatment Planning

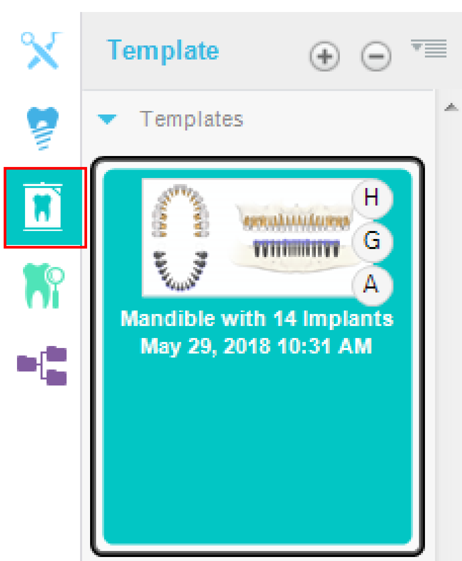
Enter a name for your template. Enter a description for the template (optional).

Click **Save** when complete.



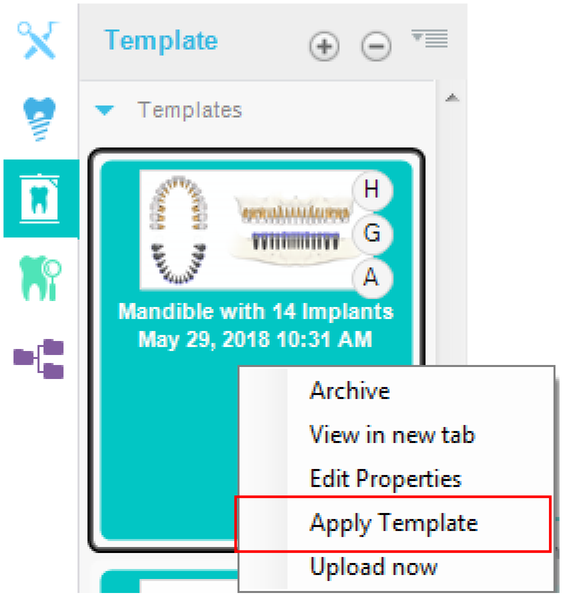
Using Treatment Templates

You can apply templates on Initial Phase, Treatment Plans or treatments. While editing one of these states click templates.



Treatment Planning

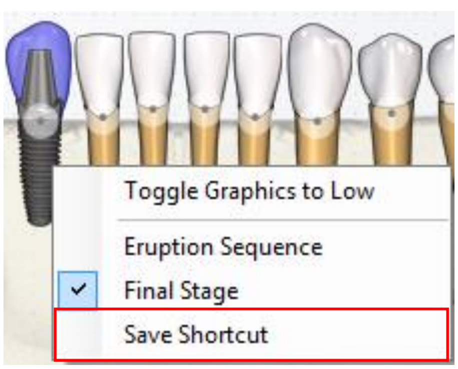
Right click one of the templates and select **Apply Template**.



Creating a Shortcut

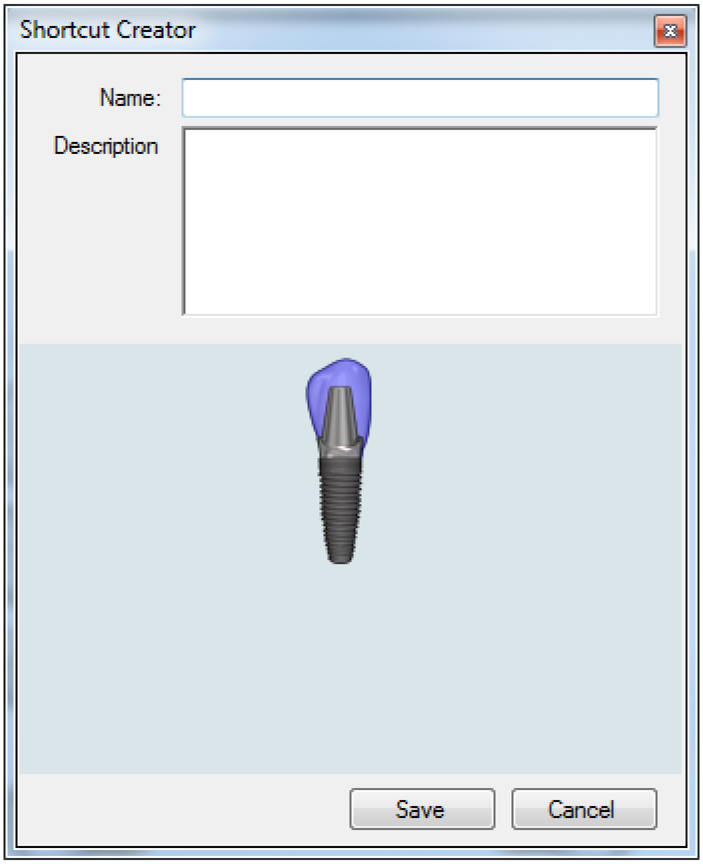
Shortcuts are made to save time from doing multiple actions with one click. For example, you can use a shortcut to add an implant, metal post and crown in one action.

Right click the tool in any state and select **Save Shortcut**.



Enter a name for the shortcut. Enter a description for the shortcut (optional).

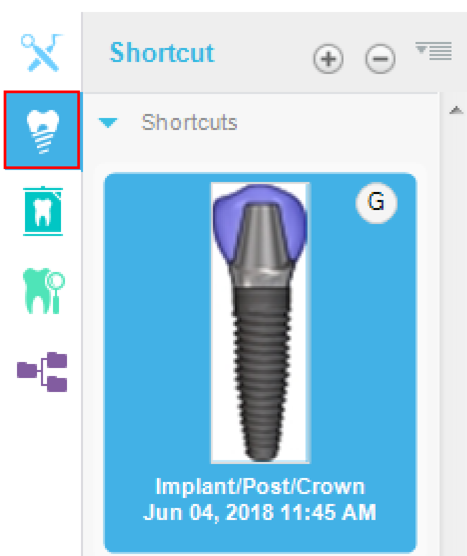
Treatment Planning



Click **Save** when complete.

Using a Shortcut

Click the **Shortcuts** button.



Select one of your shortcuts. You can use the tool in the same fashion as all other tools.

Training Videos

Consult-PRO Cloud Training Videos

Chairside

- Creating Favorites for Users and Categories - https://youtu.be/sK5KZD-Uk8w
- Chairside - Creating Tabs and Series - https://youtu.be/FbRHT6d4kmc
- Chairside - Creating Users and Patients - https://youtu.be/DXeLjq16Zbs
- Chairside - Customizing Office Settings - https://youtu.be/lbkfk2Y8Z4s
- Chairside - Customizing Presentations - https://youtu.be/275VXHIQRUI
- Chairside - Informed Consent - https://youtu.be/_eGEciWhp0Y
- Chairside - Video Tools - https://youtu.be/JPm-rgsSmco

Documents

- Documents - Documents and Cloud Storage - https://youtu.be/OhbHo38RQgY

Images

- Images - Combining Forms and Images - https://youtu.be/CDuHZtXFY0I
- Images - Getting Started With Images 1 - https://youtu.be/WJoSWm2A-SA
- Images - Getting Started With Images 2 - https://youtu.be/xZSN_oI14-s
- Images - Getting Started With Images 3 - https://youtu.be/Al_8XaMfa8Q
- Images - Getting Started With Images 4 - https://youtu.be/GKmk5Atqty4

Forms

- Getting Started With Forms and Creating Office Categories - https://youtu.be/5CLeex2z0pY
- Forms - Creating Forms From Scratch - https://youtu.be/FJf31_Gx0k8
- Filling out Forms - https://youtu.be/AJMShvlo0bU

Brochures

- Accessing and Filling Out Brochures - https://youtu.be/DUTdxEbNag0

Treatment Planning

- Creating a Treatment Plan - https://youtu.be/xVjdeyRz4F4
- Building a Treatment Planning Template - https://youtu.be/0zMkKu6d55Q
- Creating Initial States - https://youtu.be/sgGq_G6iCiM
- Sidebar Breakdown - https://youtu.be/SWym3F1e6oM