

Dolphin Mobile Client User's Guide

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Welcome

Congratulations on your decision to purchase the Dolphin Mobile client (Dolphin Mobile), which enables you to access your Dolphin database from a mobile device running Android or IOS. Dolphin Mobile provides a subset of Dolphin Management and Dolphin Imaging features and a subset of Dolphin Aquarium features. The majority of these features are read-only, however we are continually enhancing the product to enable updating the database in real-time.

Whether your office is running Dolphin Aquarium, Dolphin Management, Dolphin Imaging, or any combination of the three, Dolphin Mobile connects directly to your server. Imaging and Management users can access and view practice data in real time from anywhere in the world. Management users can search for and schedule patient appointments in real-time. Aquarium-only users can access the Aquarium features described in this guide.

This guide describes how to use Dolphin Mobile on your mobile device.

Requirements

The instructions in this guide assume you have installed the Dolphin Ocean Server and Dolphin Mobile Client as described in the *Dolphin Mobile and Dolphin Ocean Installation Guide for Android and iOS*.

Features in Dolphin Mobile

- You can run Dolphin Mobile in English, or Spanish, French or Portuguese; simply set the Language in the Android or IOS operating system to the language you want to use.
- Access to multiple Dolphin servers
- Ability to search for and schedule patient appointments
- Ability to add or change Dolphin Mobile passcodes
- Ability to send email or, if your device is also a phone, the ability to call anyone in your Dolphin database by tapping their phone number

If you have Dolphin Aquarium only installed:

- Ability to view thumbnails of all media in the Aquarium library
- Ability to filter which thumbnails you see based on diagnoses, treatments, Aquarium library, or any keyword you enter
- Ability to play Aquarium movies and view Aquarium stills on your mobile device
- Ability to play Aquarium playlists

Note: *Aquarium-only customers should skip to Using Dolphin Mobile with Dolphin Aquarium.*

If you have Dolphin Imaging installed only:

- Access to patient, doctor and billing party information including address, phone numbers, email addresses, relationships, and referrals
- Access to all patient images stored on your Dolphin Imaging server
- Ability to view side-by-side patient images
- Ability to zoom in or out on any image using the pinch function
- Ability to pan a zoomed-in image

If you have Dolphin Management installed:

- Ability to capture images of non-patients and save them to your Dolphin server
- Access to patient, doctor and billing party information including address, phone numbers, email addresses, relationships, referrals, appointment history, balance summaries, treatment card, and documents
- Ability to search and schedule patient appointments, as well as view the schedule
- Ability to view and configure the Light Bar.
- Ability to access, modify, sign, and submit questionnaires
- Ability to view, edit, and close care calls

This Guide is organized as follows:

[What's New in Dolphin Mobile?](#)

[Getting Started](#)

[Using Dolphin Mobile if You Have Dolphin Imaging Only](#)

[Using Dolphin Mobile if You Have Dolphin Management](#)

[Call, Text, Email, or Capture an Image of an Entity](#)

[Using Dolphin Mobile with Dolphin Aquarium](#)

[Virtual Braces](#)

[Customizing](#)

What's New in Dolphin Mobile?

The following sections describe what is new in Dolphin Mobile in reverse chronological order.

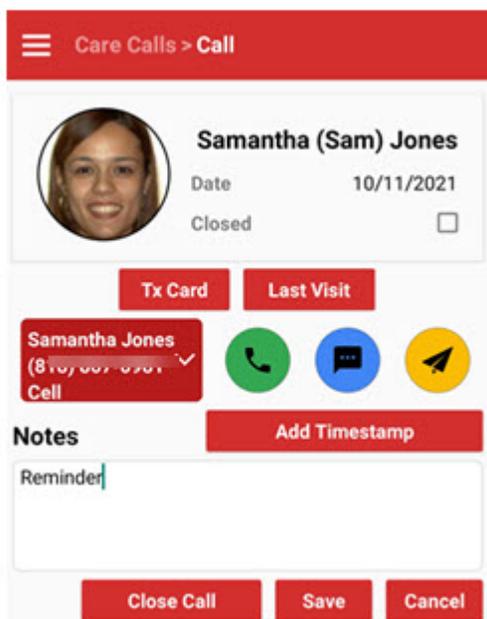
Version 8.0

Dolphin Mobile release 8.0 includes the following new features:

Care Call Enhancements

We improved the Care Calls->Call screen:

- The phone number no longer defaults to the first number in the list, but to the number associated with the scheduled care call.
- The phone number information is now a button that you can tap to see other phone numbers on file for the patient.
- We added the Messaging Center button; simply tap it to open the messaging center using the number shown.



New Application Settings

We have added the following new options to the Dolphin Mobile Settings menu:

Logout Timeout

5 minutes



Use the green slider to change the number of inactive minutes after which Dolphin Mobile will log you out.

Disable Clipboard

Prevents use of Clipboard while using Dolphin Mobile



Turn this option on to prevent users from copying and pasting contents inside writeable fields. Use this option when patients are entering information on the mobile device while in your office.

Auto Capitalization



Turn this option on if you want Dolphin Mobile to automatically capitalize the first letter when you enter text, and after a period, question mark, etc.

Grid Lines

We have added an alignment aide for capturing patient photos using Dolphin Mobile. For each photo you want to capture, you have the option to choose from no alignments 3x3 Grid, 4x4 Grid, or Golden Ratio Grid, which is shown below.

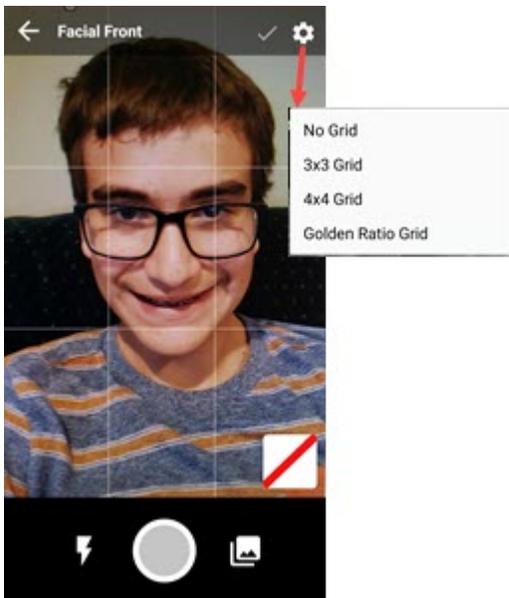


Image Layouts

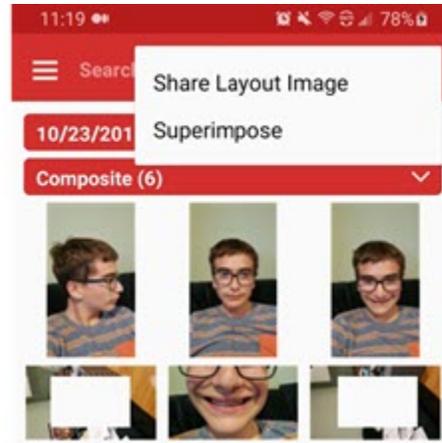
You can now create, save, and print image layouts from Dolphin Imaging in Dolphin Mobile.

From the [Patient->Patient Images](#) screen, select the layout you want to view, tap the more button and select [Share Layout Image](#).

This option is available for all image layouts except [<All Images>](#).

The [Composite \(6\)](#) layout is shown at right.

A message is displayed while Dolphin Mobile creates a jpg file of the image layout in portrait format. From here, you can save the file, share it with a contact, or print it directly from Dolphin Mobile, if your mobile device is set up for printing.

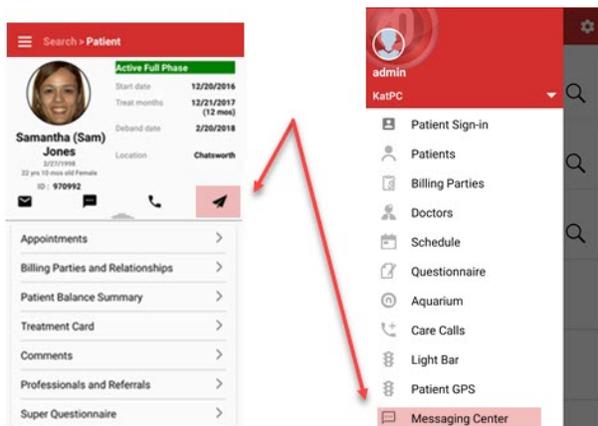


Location Security and Employee Roles

Dolphin Mobile now honors the location settings that are enabled in Dolphin Management as well as the application rights associated with the role assigned to each employee.

Message Center

Providing you have Dolphin Management 10.6 installed, your practice is a subscriber of Premium 2-Way SMS Messaging, you can now access the [SMS Messaging Center](#) from Dolphin Mobile. (For Secure Messaging, MyOrthodontist is also required).



From the Main menu, tap **Messaging Center**, or from any patient, doctor, or billing party screen tap the  to open the Messaging Center, or a screen where you can enter messages to the patient, doctor, or billing party (if you selected the airplane icon).

From the Inbox, tap the  to open the Messaging screen, where you can access the Sent, Recent, and any groups you have configured on the SMS Messaging Center in Dolphin Management:

Patient GPS

Providing you have Dolphin Management 10.6 installed, you can now access Patient GPS features from Dolphin Mobile.

- From the home screen, tap  to open the main menu, and then tap **Patient GPS**.
- From the Light Bar screen, tap  to open Patient GPS.

From Patient GPS, swipe the status bar to view a list of patients in each status, see their sign-in time, how long they have been waiting, how many minutes they were early or late, and the time they entered the status.

The Patient GPS updates in real time, and it honors the color settings configured in Dolphin Management.

Schedule

You can now swipe up or down on the calendar to change the schedule year. Swipe up to move forward one year, and swipe down to move back one year.

Super Questionnaire

We added a settings button to the **Questionnaire** screen: .

Tap it to access two new options, which are toggled off by default:

- **Exit to Home Page** when toggled on, the app returns you to the home page after you finish signing a questionnaire.
- **Skip to Unanswered** when toggled on, any partially completed questionnaires will load starting with the first unanswered question, so you can quickly get back to where you were previously.

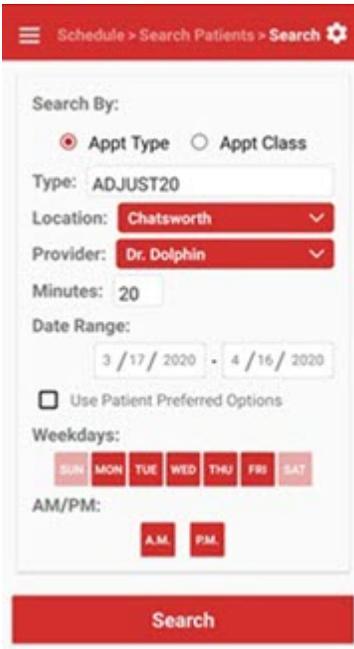
Version 7.0

Dolphin Mobile release 7.0 includes the following new features:

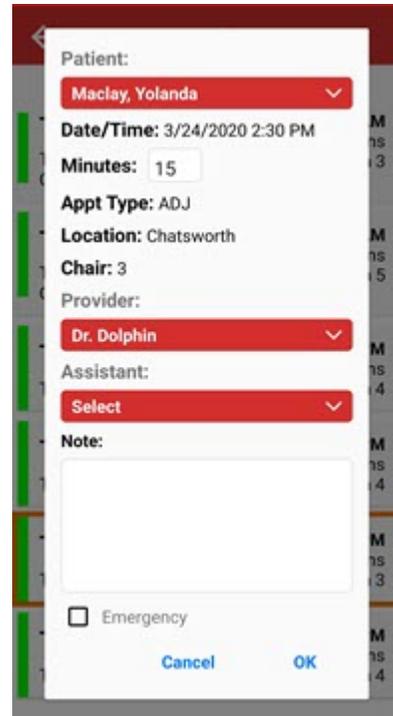
Search and Schedule Appointments

You can now search for and schedule an appointment using Dolphin Mobile. From the [Schedule](#) screen,

tap , which prompts you to select a patient. The [Search](#) screen that opens provides the same options available to you in Dolphin Management, via the [Search Schedule](#), [Search Options](#) tab:



Screenshot of the Search Patients screen in Dolphin Mobile. The screen shows search filters for Appt Type (ADJUST20), Location (Chatsworth), Provider (Dr. Dolphin), Minutes (20), Date Range (3/17/2020 - 4/16/2020), Weekdays (SUN, MON, TUE, WED, THU, FRI, SAT), and AM/PM (A.M., P.M.). A red Search button is at the bottom.



Screenshot of the appointment scheduling screen in Dolphin Mobile. The screen shows fields for Patient (Maclay, Yolanda), Date/Time (3/24/2020 2:30 PM), Minutes (15), Appt Type (ADJ), Location (Chatsworth), Chair (3), Provider (Dr. Dolphin), Assistant (Select), Note, and an Emergency checkbox. Cancel and OK buttons are at the bottom.

Touch [Search](#) to open a list of appointments, and tap the one you want to schedule. On the next screen, shown above, you can specify whether this is an Emergency appointment, select the treating assistant, if known, and enter a note. The appointment is added to the schedule after you touch [OK](#). The Management Calendar on the desktop is refreshed in real-time.

Note: *The logged-in user must have the Dolphin Management Scheduling rights, [Appointment - Override Minutes](#) and [Appointments - Create](#) in order to make appointments/and or override the appointment minutes in Dolphin Mobile.*

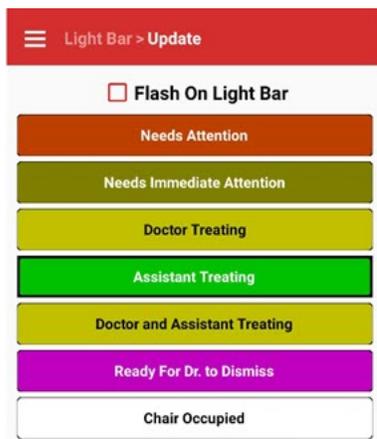
Light Bar

We have added a subset of Dolphin Management Light Bar features to Dolphin Mobile. From the main menu, touch Light Bar. Practices with more than one location will be prompted to choose which location they want to access.



Once the Light Bar opens, you can:

- Touch  to customize how the Light Bar appears, such as the number of columns (1 or 2), and several of the same options you see on Dolphin Management.
- Touch a colored bar to open the Update screen for the patient associated with that bar.



- Move the patient to a different lighting status by tapping on the new status.

Improved Patient Sign-In

- You can now choose between staff mode or patient mode when setting up patient sign-in on a remote device and/or kiosk in your lobby.
- We removed the button from the Sign-In screen, and we replaced it with an actual QR code your patients can use to sign into the practice.

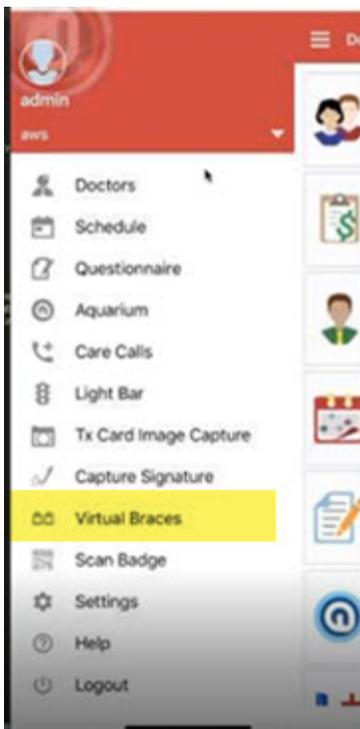
Improved Performance

We optimized communication between Dolphin Ocean and Dolphin Mobile for faster response times.

Virtual Braces (iPhone X with TrueDepth Camera)

While a patient is in your office, you can use the Virtual Braces feature to show them what the various braces options will look like. iPhone X or higher with a TrueDepth camera users only can see this feature on the main menu.

This tool has several options, enabling you to show the patient a virtual example of what they would look like with ceramic versus metallic braces, different colors of bands; you can customize the virtual teeth by making them wider or narrower to better match the patient's actual teeth. This feature works on iPhone or iPad X and newer devices equipped with a TrueDepth camera only.



Version 6.0

Dolphin Mobile release 6.0 includes the following new features:

Document Sharing

You can now share documents and photos with all entities in Dolphin. Simply navigate to the profile of the patient, billing party, or other entity, and tap **Documents**. Tap the plus sign to browse for images, down-

loads, files, etc. from your phone or tablet. Any documents you share are automatically added to the entity's **Documents** folder in Dolphin Management.

Document Signing

Office staff as well as patients and billing parties (when they are in your office) can sign documents using Dolphin Mobile.



- 1 From Dolphin Management, add any of the tokens used for signature capture to a document that requires a signature.
- 2 Save this document in the patient's Dolphin Document Organizer.
- 3 Open the patient record in Dolphin Mobile, and touch **Documents**.
- 4 When you open a document requiring a signature, the signature icon appears .
- 5 Touch the icon to open the signature box.
- 6 Once you are satisfied with the signature(s), touch the  to save the signed copy of the document.

Patient Comments

You can now add, edit, and delete comments associated with a patient record. From the **Patient** screen tap **Comments**. Any changes you make to patient comments in Dolphin Mobile automatically update in Dolphin Management and vice versa.

Patient Sign-in

There is a new option on the main menu, Patient Sign-in. Once Dolphin Management is set up to enable this feature, your patients can sign in directly to a mobile device set up in your reception area using patient badge, or by touching their name on a list of today's appointments.

To enable this in Dolphin Management:

- 1 Click **Edit-->Practice-->Locations-->Options** button-->**Sign-in** tab.
- 2 Set the Sign-in entry method to **Patient List** (to show a list of appointments) or **Keyboard Only** (to have patients key in their names) and use patient badge.

Dolphin Mobile now honors the font sizes configured in Dolphin Management (**Edit-->Practice-->Locations-->Options** button-->**Messages** tab).

Image Capture

Dolphin Imaging users can now use Dolphin Mobile running on their smart phone as an image capture device.

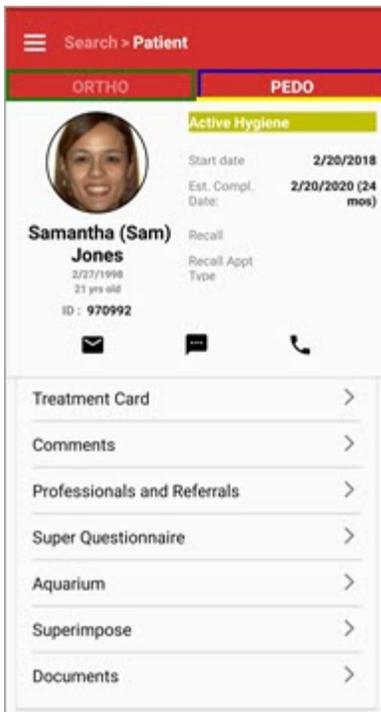
- 1 From Dolphin Mobile, navigate to the patient whose image you want to capture.
- 2 Touch the image icon to open the **Patient Images** screen.
- 3 Touch the camera icon to open the **Capturing** screen.

If no timepoints exist for the selected patient, Dolphin Mobile prompts you to enter and save one. You will then have to touch the camera icon again to open the Capturing screen.

This is described in more detail in "Capture Patient Images" on page 86.

Multi-Specialty Support

Dolphin Mobile now supports Dolphin Management's Specialty module. There are two tabs on the Patient screen for practices using the Specialty module. To view patient information, touch the tab corresponding to the specialty you want to view.



Enhanced Doctor Profiles

You can get more information on doctors in your database:

- The Doctor Info section now includes information such as his or her practice name, spouse name, and any notes you have added to the Notes section on the Edit a Doctor, Doctor tab in Dolphin Management.
- You can view any history stored for this doctor (Edit a Doctor, History tab).
- You can now access information about this doctor's contacts (Edit a Doctor, Contacts tab).

Version 5.0

Dolphin Mobile release 5.0 includes the following new features:

Scan Patient Badge

For your patients using the mobile app, MyOrthodontist, **PATIENT BADGE** feature, you can use the new Scan Badge feature in Dolphin Mobile to scan those patients. Scan Badge, found on the main menu, opens up a QR scanner on the device running Dolphin Mobile. You can then scan the patient badge shown on the patient's mobile device running MyOrthodontist. When office staff open Patient Lookup in Dolphin Management, the scanned patient is displayed; additionally, the patient GPS is updated with that patient's latest status information.

Tooth Chart Views

You can now view the tooth chart and all of the views (All charted items, Elastics only, Brackets only, etc.)

set up in Dolphin Management. When you open a patient's treatment card, swipe until you see the icon. Tap it to open the tooth chart, and touch the drop-down menu to select the desired view.



More Swipe Functionality

- When viewing a patient's images, you can now swipe left or right to navigate between timepoints instead of having to tap the Timepoint drop-down menu.
- You can now swipe to switch between months on the Schedule.

New Settings Options and Saved Locations

The Settings menu includes two new options:

- Show Listed Servers

If you have more than one server available, turning this option on will show a list of available servers when you launch the application. Previously, Dolphin Mobile automatically connected to the server you accessed the last time you used the app. If you want Dolphin Mobile to continue that behavior, simply turn the Show Listed Server option off.

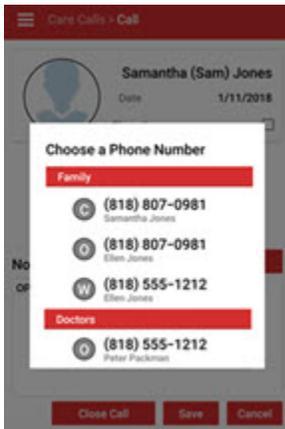
- Change Password

You can now change your Dolphin password directly from Dolphin mobile. Additionally, if your password is about to expire when you log in to Dolphin Mobile, you are prompted to update it.

Dolphin Mobile remembers which practice location you select when viewing the schedule; the next time you log in, and open the schedule it opens at that location.

Care Calls

When you open a care call and tap the telephone icon, you now get a list of patient family members and other professionals (such as doctors, oral surgeons, etc.) associated with the patient.



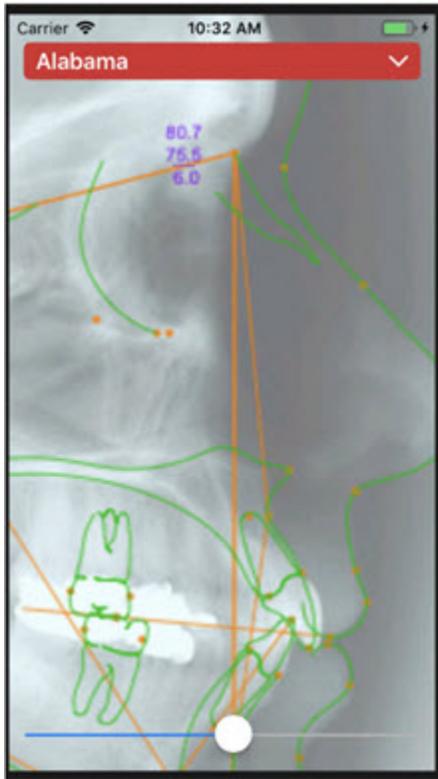
Ceph Tracing and Measurement Table

You can now view patient images with cephalometric tracing. When you see an image with this icon on it, tap on the icon to open the image:



Once you open the image you can zoom in, zoom out, and pan.

Additionally, if the ruler icon  appears on the image, you can tap it to open a screen of patient measurements.

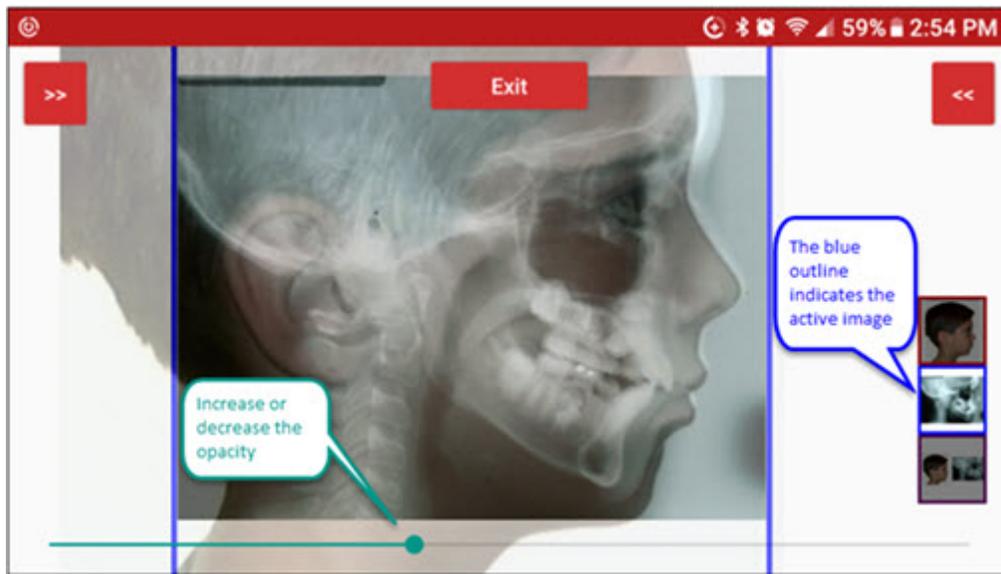


Group/ Measurements	Norm	Std Dev	Value	Dev Norm
SNA (°)	82.00	3.50	80.71	-0.37
SNB (°)	80.90	3.40	75.46	-1.60 *
ANB (°)	1.60	1.50	5.25	2.43 **
Facial Plane to SN (SN-NPog) (°)	80.00	4.00	75.25	-1.19 *
Y-Axis (SGn-SN) (°)	67.00	5.50	72.25	0.95
MP - SN (°)	33.00	6.00	42.92	1.65 *
Occ Plane to SN (°)	14.40	2.50	19.71	2.13 **
Occ Plane to A-B (°)	88.90	4.00	87.00	-0.47
U1 - Occ Plane (°)	57.00	7.00	60.21	0.46
U1 - NA (°)	22.80	5.70	19.36	-0.60
U1 - SN (°)	102.70	5.50	100.07	-0.48
U-Incisor Protrusion (U1- APo) (mm)	6.00	2.20	37.78	14.45 *****
U1 - NA (mm)	4.30	2.70	19.23	5.53 *****
L1 - NB (mm)	4.00	1.80	38.32	19.07 *****
L1 - SN (°)	57.50	8.50	39.67	-2.10 **

Note: *Dolphin Mobile displays patient images and ceph tracings for convenient reference. However, patient diagnosis and treatment decisions should be made using only the full Dolphin Imaging software on a desktop computer.*

Superimpose, Pan, and Scale

From the new Patient-->Superimpose menu, you view patient images side-by-side, and select one to superimpose over the other. Use the thumbnails next to the image to select the active image. Then you can pan and scale to position it correctly.



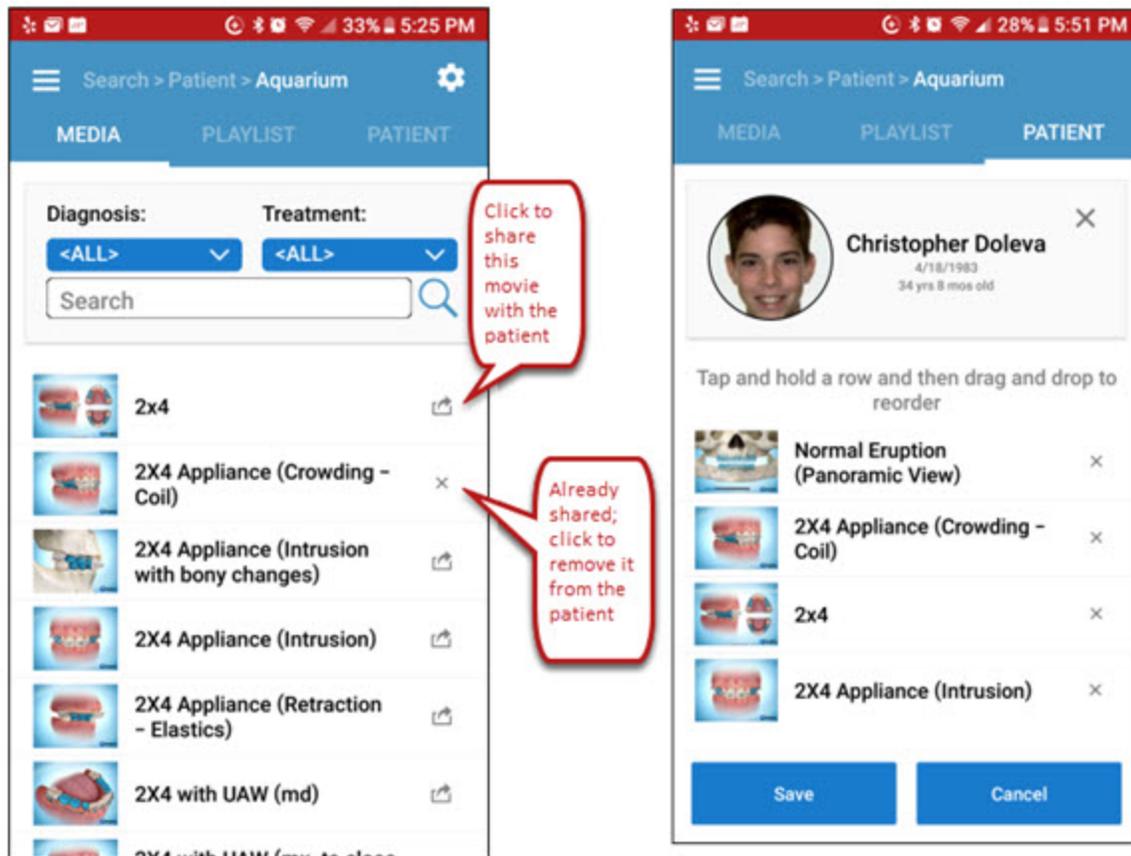
New Aquarium Features

- Access Aquarium from a Patient

If you have a license for Dolphin Aquarium, you can now access the mobile version directly from the Patient menu in Dolphin Mobile. When you open Aquarium from a patient, you can associate Aquarium media with that patient. Any media you associate with a specific patient in Dolphin Mobile shows up in that patient's Shared Media library on Aquarium desktop and vice versa.

Patient's that have MyOrthodontist running on their mobile device can view Aquarium media you have associated with their record.

The Save button (shown at right, below) appears when you have added media to the patient record. If you attempt to leave the PATIENT tab, Dolphin Mobile prompts you to save the shared media.



- Grid View for Tablet Users

A grid view of Aquarium media thumbnails is now available when running Dolphin Mobile on a tablet.

Version 4.5

- View side-by-side patient images
- Fingerprint login
- Ability to configure column width in the treatment card
- Remote signature capture

Getting Started

This section describes how to log in to Dolphin Mobile and provides an overview of the Dolphin Mobile menus.

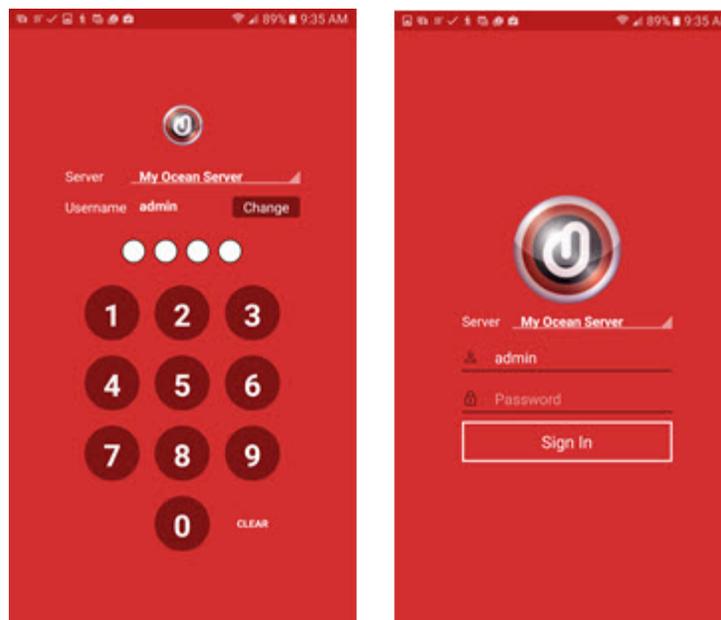
Once Dolphin Mobile is installed and running on your mobile device, logging in varies depending upon whether your device is set up to access one Dolphin server or multiple Dolphin server databases in different locations.

Single Dolphin Server

To log in to one server:

- 1 Touch the Dolphin Mobile icon on your mobile device.

The screen you see depends upon whether or not you have set up a passcode and whether or not you have a stored fingerprint on your mobile device (for more information, see ["Fingerprint Login" on page 25](#)).



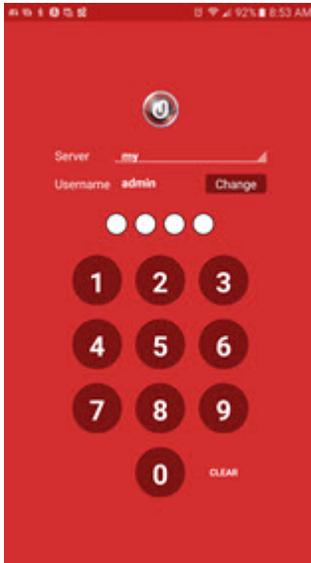
- 2 Enter your four-digit passcode or your user name and password if you do not have a passcode.
The Dolphin Mobile home screen opens.

Multiple Dolphin Servers

To log in to Dolphin Mobile when you have access to more than one Dolphin server database:

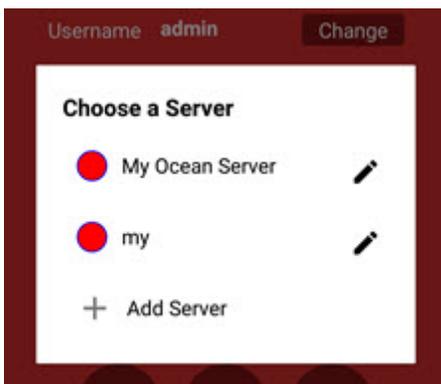
- 1 Touch the Dolphin Mobile icon on your mobile device.

The following screen opens:



- 2 Enter your passcode if you want to log in to the server shown. Otherwise, touch anywhere on the Server name.

Dolphin Mobile prompts you to choose a server:



- 3 Touch the server you want to use.

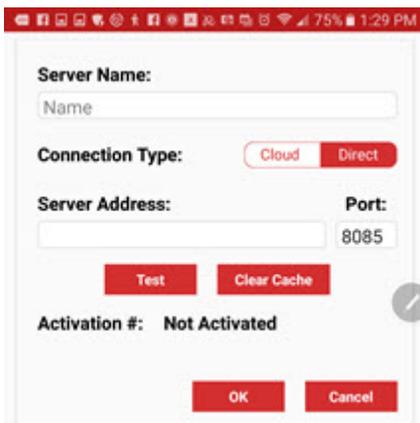
If a passcode has been set up for the current user name, on this server, Dolphin Mobile prompts you to enter a passcode. If no passcode has been set up, Dolphin Mobile prompts you for your Dolphin user name and password.

Adding, Deleting and Editing Servers

To add another server to the server list:

- 1 From the [Choose a Server](#) prompt, touch  **Add Server** .

The following screen opens:



- 2 Complete the information, and activate the server as described in the *Dolphin Ocean Server and Dolphin Mobile Client Installation Guide*.

To delete a server:

- 1 From the list of available servers, touch the  next to the server you want to delete.
- 2 Select  from the server information screen that appears.

To edit a server:

- 1 From the list of available servers touch the  next to the server you want to edit.

The following screen opens, and the information about the current server is displayed:

Server Name:
My Ocean Server

Connection Type: Cloud Direct

Server Address: demo.dolphinimaging.com **Port:** 8085

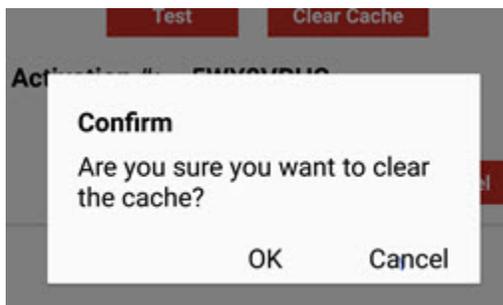
Test Clear Cache

Activation #: 5WY8VRHS

Delete OK Cancel

- 2 To change the server name, server address, and server port, touch the appropriate area and key in the new data on the keypad.
- 3 Touch the **Test** button to test the server connection.
- 4 Optional: touch the **Clear Cache** button if you have previously viewed images, letters, or Aquarium movie clips, and you want to free up memory card space.

The following message box opens:



- a Touch **OK** to clear the data cache, or touch **Cancel** to leave it as it is.
- 5 Touch **OK** to save or **Cancel** to exit the list of servers dialog box without saving.
- 6 Touch outside the **Choose a Server** box to return to the **Login** screen.

To log in as a different user:

- 1 From the **Login** screen, touch the **Change** button.
- 2 Enter the user name and password for the new user.

- 3 Enter a passcode for this user.
 - 4 Enter this passcode again when prompted to confirm the passcode for this user.
- Note:** Every time you switch users, Dolphin Mobile prompts you to enter a user name and password, even if a passcode is set up for that user.

Adding a Server after Logging in

You can access the server menus after logging in to Dolphin Mobile if you want to add a new server, delete, or edit an existing server.

- 1 From the home screen, touch the  button.

- 2 Touch the  to show the server menu:



- 3 Follow the instructions in ["Adding, Deleting and Editing Servers" on page 20.](#)

- 4 Touch the  to return to the main menu.

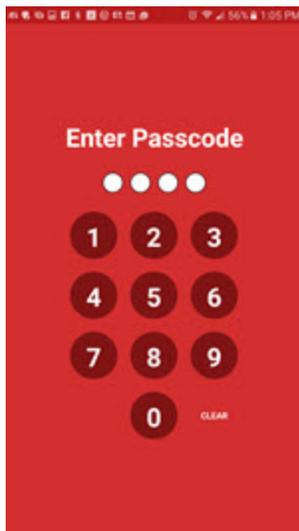
Passwords and Passcodes

Dolphin Mobile requires you to set a passcode when you first login to the application so you don't have to enter your Dolphin user name and password every time you connect to the Dolphin server. You only need to set up a passcode once for each user.

Passcodes apply to the last user logged in only. If another user logs in to the same device, and then you log in, Dolphin Mobile will prompt you to enter your full user name and password. You can also change your Dolphin desktop password from Dolphin Mobile at any time.

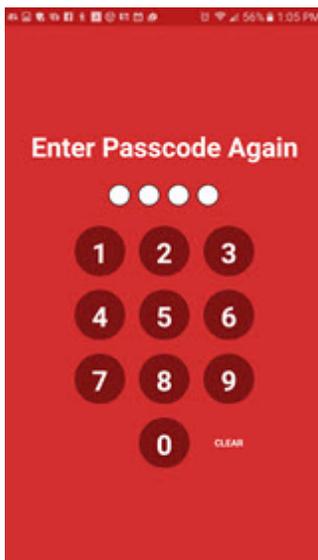
To set a passcode:

- 1 After logging in for the first time, the following screen appears:



- 2 Touch the buttons on the keypad to define your passcode.

Dolphin Mobile prompts you to enter your passcode again:

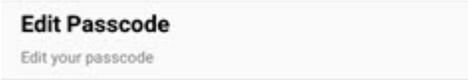


- 3 Touch the buttons on the keypad to enter your passcode.

Updating Your Passcode

If your Dolphin password has changed since you last logged in to Dolphin Mobile, and you have a Dolphin Mobile passcode, you need to update the passcode on your mobile device. You will be prompted for your full user name and password in this case.

- 1 From the home screen, touch the  button.
- 2 Touch the **Settings** option.

- 3 Touch , and then set your passcode as described in ["Passwords and Passcodes" on page 23](#).

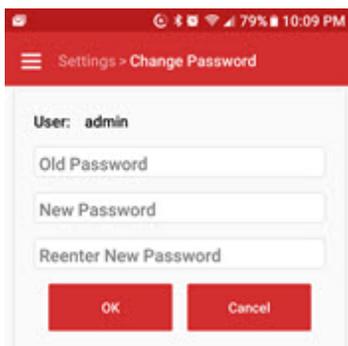
Changing Your Password

You can change your Dolphin password directly from Dolphin Mobile. You can also configure Dolphin Mobile to remind you to update your Dolphin password, when it is about to expire.

- 1 From the home screen, touch the  button.
- 2 Touch the **Settings** option.

- 3 Touch .
- 4 On the Change Password screen, enter your old password, your new password, and reenter your new password.
- 5 Touch **OK**.

Your new Dolphin password is saved; be sure to enter this password the next time you log into any of the Dolphin desktop products.



Fingerprint Login

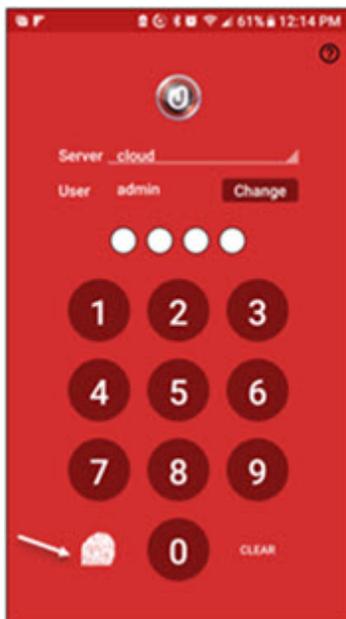
To log in to Dolphin Mobile with a fingerprint instead of a passcode, you must first scan and register your fingerprint on your mobile device.

- 1 Log in to Dolphin Mobile.

The app recognizes that a fingerprint is stored, and it prompts you with the [Confirm](#) message box.

- 2 Touch **YES** to allow fingerprint login.

The next time you log into Dolphin Mobile, an animated fingerprint appears in the lower left corner of the passcode screen.



- 3 Do one of the following depending upon the device type you are using:
 - On a device running iOS, touch the animated finger print to open a dialog box asking for your fingerprint.
 - On a device running Android, touch the fingerprint scanner on your phone.

Enabling or Disabling Biometrics

You can enable or disable biometrics while you have a fingerprint stored on your mobile device (both Android and iOS) and facial recognition (for [Virtual Braces](#) feature) set up on your iOS device.

To enable biometrics on Dolphin Mobile:

- 1 From the home screen, touch the  button.
- 2 Touch the **Biometrics** toggle button to turn biometrics features on or off.

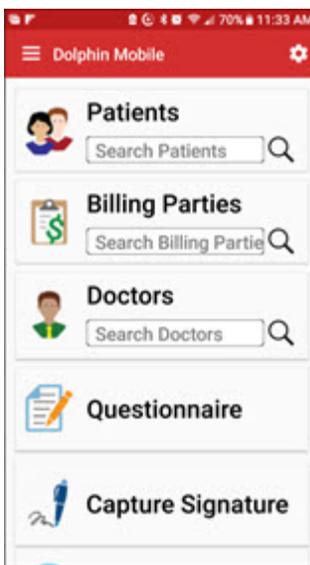


Menu Overview

Dolphin Mobile provides different ways to access the various screens and menus. This section describes some of these screens and menus and how you navigate to them.

Home

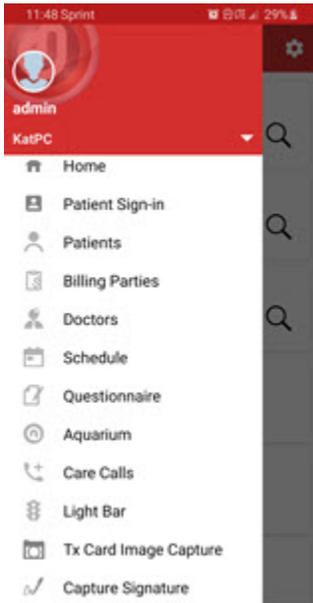
The home screen, shown below is what you see after you log in to Dolphin Mobile. The options that appear there may vary depending upon the Dolphin product or products for which you are licensed:



From the home menu you can navigate to other areas of the app, as shown, and you can touch the  to navigate to the home settings menu, where you can customize and reorder the options that appear on the home menu. See ["Reorganizing the Home Menu" on page 98](#) for more information.

Main Menu

You can access the main menu by touching the  from the home screen or other screens. The options that appear on the main menu vary depending upon the Dolphin product or products for which you are licensed:



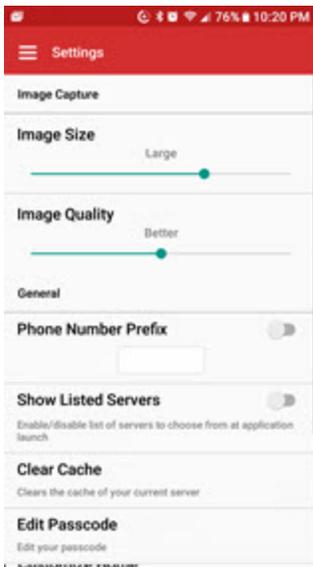
Swipe up or down to scroll through the options on the main menu.

Some features, such as Questionnaire can be accessed from the home screen, the main menu or from a patient screen.

From any screen or menu in the program, you can always touch the  to access the main menu from which you can navigate to another area of the program, get help about the program, or log out of Dolphin Mobile.

Settings Menu

You access the main app settings by touching **Settings** on the main menu.



Swipe the scroll bar to see the rest of the Settings menu.

Using Dolphin Mobile if You Have Dolphin Imaging Only

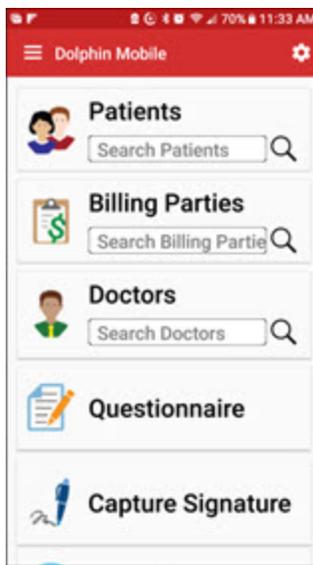
This section describes how to use Dolphin Mobile to access and view data from your Dolphin Imaging server.

Note: *Dolphin Mobile displays patient images and cephalometric tracings for convenient reference. However, patient diagnosis and treatment decisions should be made using only the full Dolphin Imaging software on a desktop computer.*

To open Dolphin Mobile:

- 1 On your mobile device, touch the Dolphin Mobile icon.
- 2 When prompted, enter your Dolphin Mobile passcode or user name and password if you do not have a passcode.

The Dolphin Mobile home page opens.



From here you can view patient, doctor, or billing party information, questionnaires, capture signatures or view Aquarium media, if you also have Dolphin Aquarium installed.

View Patient Information

To view patient information from Dolphin Imaging:

- 1 Touch the **Patients** search box.

The following screen opens:

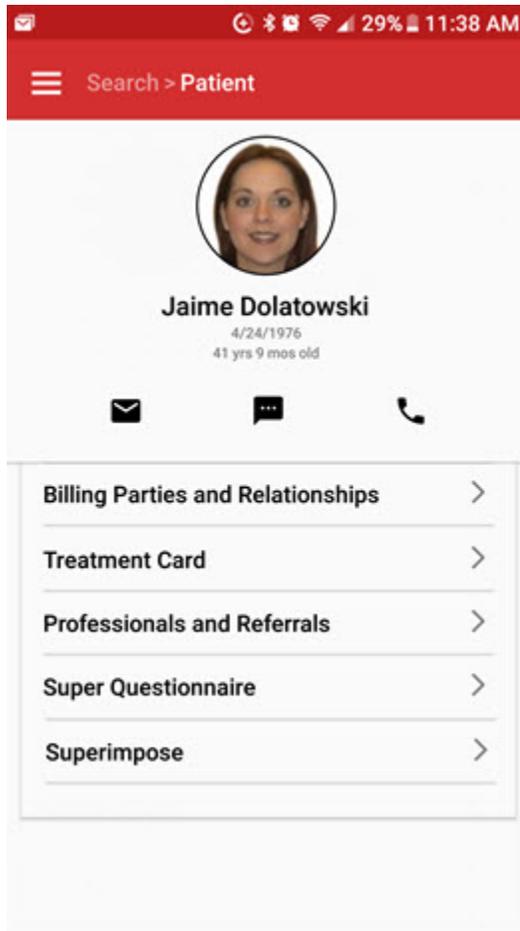


- 2 Touch the letters on the keypad to enter the name of the patient you want to view.
- 3 Touch the search button on the keypad.

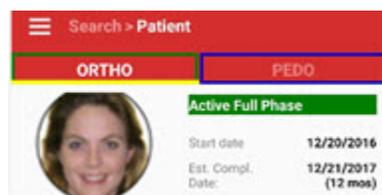
Dolphin Mobile displays a list of names that match what you entered on the keypad. If you have accessed other patient data previously, a list of most recently viewed patients is displayed:

- 4 Touch the name of the patient whose information you want to view.

The patient information screen opens:

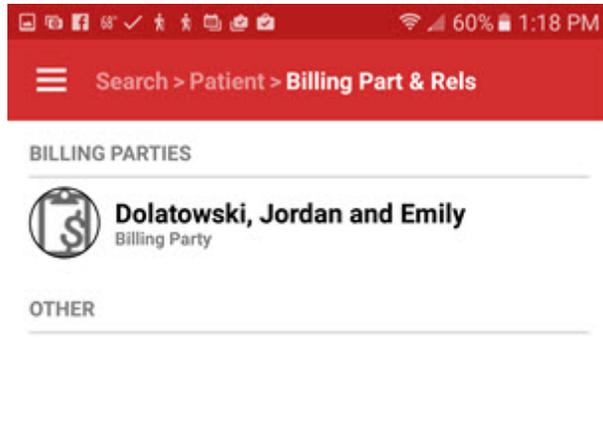


Note: *If you are in a multi-specialty practice, the patient information screen will have tabs for each specialty. These tabs appear just above the patient image.*

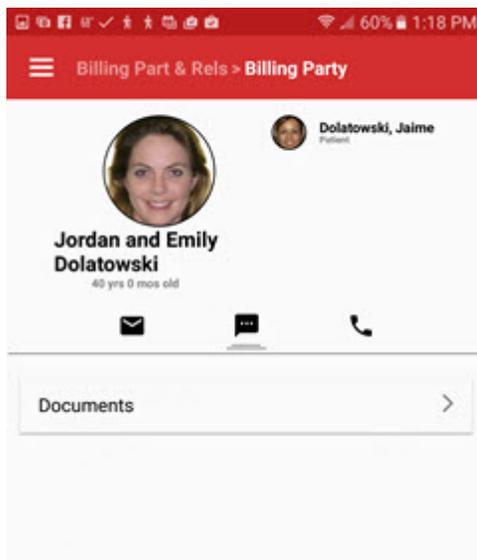


- 5 If you searched using the first few letters of a patient's last name, you can swipe left or swipe right to go to the previous or next patient meeting that search criteria.
- 6 Touch the envelope, messaging, or phone icons to email, send a text message, or call this patient.
- 7 To view more demographic information, touch and drag the _____.
- 8 To view more information about billing parties and relationships this patient has with other entries in your database:
 - a Touch **Billing Parties and Relationships>**.

The following screen opens:

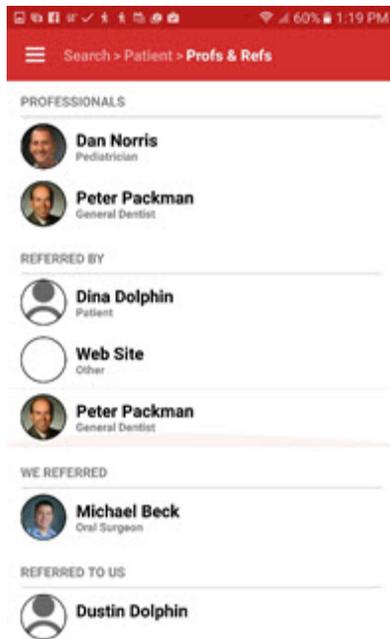


- b Touch the name of the person for whom you want to view more information:



- c Touch the envelope, messaging, or phone icons to email, send a text message, or call this billing party.
- d To view more demographic information about this person, touch the _____ .
- e To return to the [Patient](#) screen, touch the previous menu item until you get to [>Patient](#), or if you are using an Android device, touch the Back button on your mobile device until you get to the [Patient](#) screen.
- 9 On the [Patient](#) screen, touch the [Professionals and Referrals](#) button.

The next screen shows who referred this patient to your office, who you have referred this patient to, if he/she needed to be referred out, who the patient has referred to your office, and what other medical professionals are associated with this patient.



- 10 To return to the [Patient](#) screen, touch [Patient>](#), or touch the Back button if you are using an Android device.

View Billing Party Information

To view billing party information from Dolphin Mobile:

- 1 From the Dolphin Mobile home menu, touch the [Billing Parties](#) search box.
- 2 When the [Search Billing Parties](#) search screen opens, touch the letters on the keypad to enter the name of the billing party.
- 3 Touch the search button.
- 4 If more than one billing party is listed on the next screen, touch the name of the billing party whose information you want to view.
- 5 Touch the envelope, messaging, or phone icons to email, send a text message, or call this billing party.
- 6 To view more demographic information about this person, touch and drag the .
- 7 If you searched using the first few letters of a doctor's last name, you can swipe left or swipe right to go to the previous or next doctor meeting that search criteria.
- 8 Touch the envelope, messaging, or phone icons to email, send a text message, or call this doctor.
- 9 To view more demographic information about this doctor, touch and drag the .

Treatment Card

To access treatment card information for this patient:

- 1 From the **Patient** screen touch the **Treatment Card>** text.

The following screen opens, which shows the ten most recent entries:

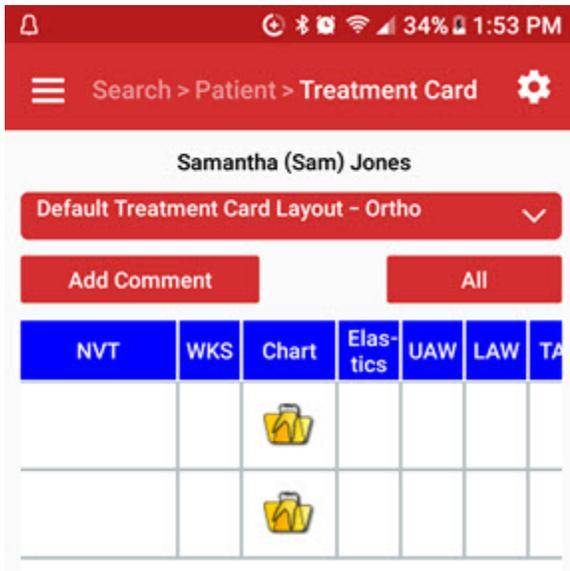
Date	E	ASST	PROC	DR	T
12/25/2010	C				CALLED FROM CONFIRMATION LIST FOR 1/5, LM
12/30/2010	V	17	60		BOI
1/27/2011	V	23	63 65	1	EVAL UPPER WIRE CI WANTS TO
3/9/2011	V	TR	Wire		Wi
7/9/2011	V	TR	wire	DM	Wi
11/13/2011	V	VR	PROG	DI	f
12/21/2011	V	TM	wire		No wire c
2/21/2012	E				
2/23/2012	C				Aquarium "AAO Test Playlist" Playlist started from
2/21/2012	N	TR	wire		

- 2 Touch the down arrow to view a different treatment card layout.
- 3 Swipe the screen to view the remaining columns and/or entries on the treatment card.

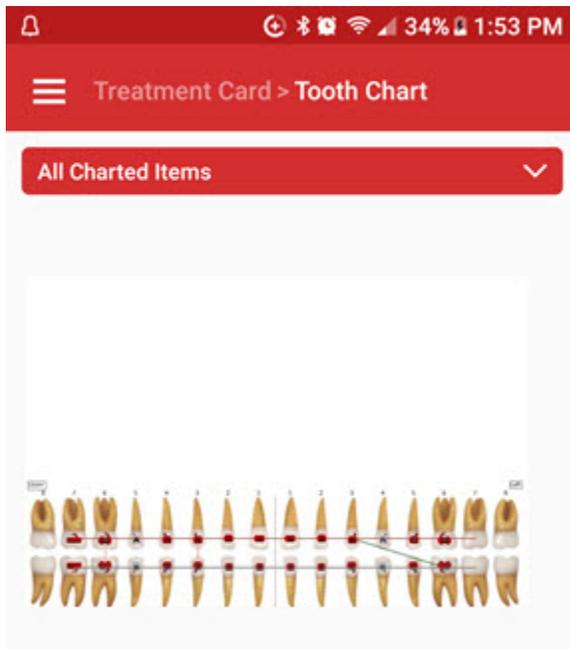
Note: If you do not see all of the treatment card fields you expect, it is because Dolphin Mobile does not display all fields automatically. This enables you to specify which fields you want to see on your mobile device. See "Dolphin Management Treatment Card Settings" on page 100.

To view the tooth chart for this patient:

- 1 Swipe the screen until you see if there is a tooth chart icon on the patient's treatment card, for example:



- 2 Touch the  .



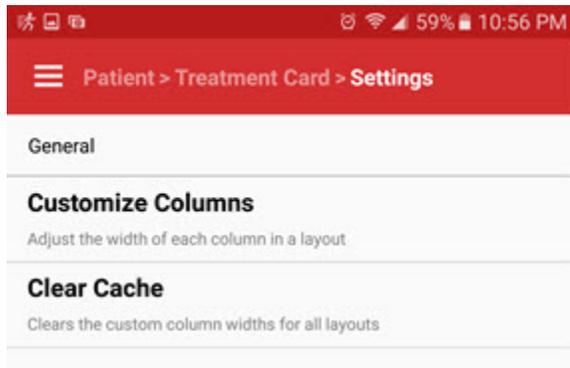
- 3 Optional: Touch the  to change the view of charted items. (All Charted Items is selected by default.)
- 4 Pinch to zoom in or zoom out.

- To return to the [Patient](#) screen, touch **Patient >**.

To customize the width of columns on the treatment card:

- From the [Treatment Card](#) screen, touch .

The [Settings](#) screen opens.

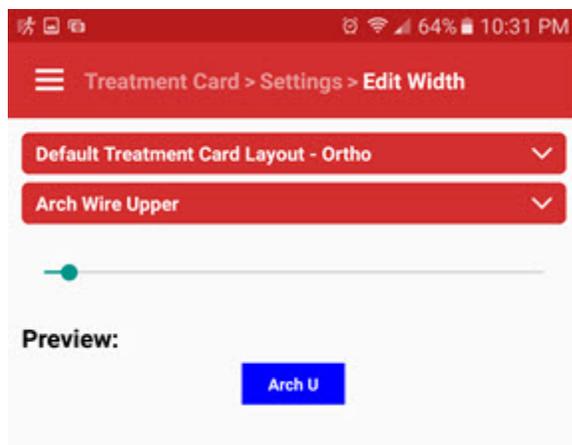


- Touch [Customize Columns](#).

If you have more than layout on this patient's treatment card, Dolphin Mobile prompts you to select a layout.

- Select the layout.

The [Edit Width](#) screen opens:



- Touch the  to open a list of treatment card columns you can resize.
- Touch the column you want to resize. (on the screen above, it is the Arch Wire Upper (Arch U) column.
- Touch and drag the  until the column shown in the [Preview](#) is set to the desired width.

- 7 Repeat the previous 3 steps for each column you want to resize.
- 8 Touch **Settings>** to exit the **Edit Width** screen.

To revert to the previous column width settings:

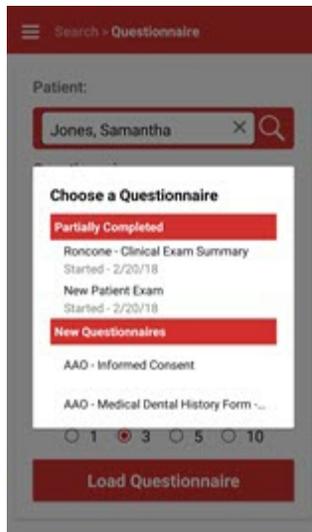
- 1 On the **Settings** screen touch **Clear Cache**.
- 2 Touch OK on the message box to clear the custom column width settings for all treatment card layouts.
- 3 Touch **Treatment Card >** to return to the patient's treatment card screen.
- 4 To return to the **Patient** screen, touch **Patient >**

Using Questionnaire

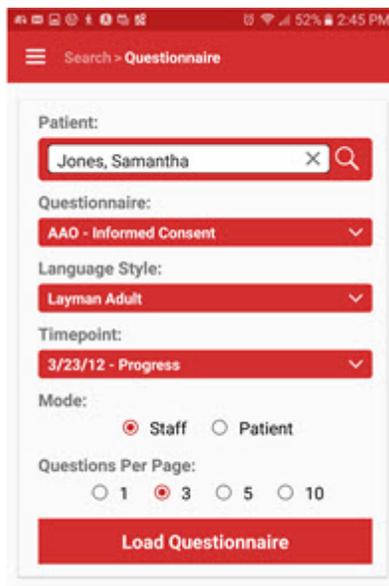
You can view, edit, have patients fill out and sign questionnaires from your mobile device.

- 1 To access a questionnaire, do one of the following:
 - o From the Dolphin Mobile main screen, or from any screen where the button is visible:
 - f Touch .
 - g From the displayed list, touch **Questionnaire**.
Any patients you had previously viewed are displayed on the **Search** screen.
 - h Select a patient for whom you want to view a questionnaire.
 - o From the **Patient** screen:
 - a Touch **Super Questionnaire**.
 - o From the home screen:
 - a Touch **Questionnaire**.

A list of available questionnaires is displayed.



- 2 Touch the questionnaire you want to view.
- 3 Choose a language style (Layman Adult, Clinical, Layman, or Dentist) when prompted.
- 4 Choose a time point when prompted.



- 5 From the [Questionnaire](#) screen touch the **Staff** or **Patient** radio buttons to specify the viewing mode.
- 6 Touch the radio button corresponding to how many questions per page you want to view at a time.
- 7 Touch **Load Questionnaire**.

The following screen shows a sample Extraction Request questionnaire in staff mode, with 10 questions per page:

8 Complete the questionnaire on the mobile device.

9 Touch the  and  arrow buttons to go back or forward to the next page.

10 At any time you can touch  to save the questionnaire and complete it at another time.

11 Touch  to sign the questionnaire.

12 Select the signing party when prompted.

13 When finished, touch **Submit**.

Once the questionnaire has been submitted, it will open in read-only mode.

If you are a patient filling out the questionnaire, Dolphin Mobile returns to the [Enter a Passcode](#) screen after you click **Submit**.

If you are office staff completing a questionnaire, you are returned to the [Questionnaire](#) screen after you click **Submit**.

View Patient Imaging Data

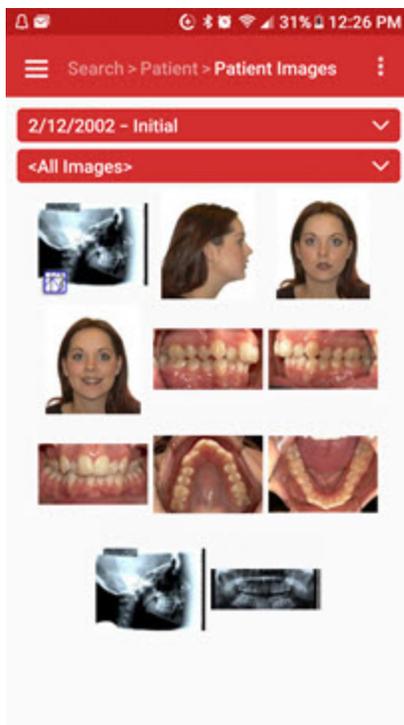
You can view patient imaging data from Dolphin Mobile as described below.

Note: *Dolphin Mobile displays patient images and cephalometric tracings for convenient reference. However, patient diagnosis and treatment decisions should be made using only the full Dolphin Imaging software on a desktop computer.*

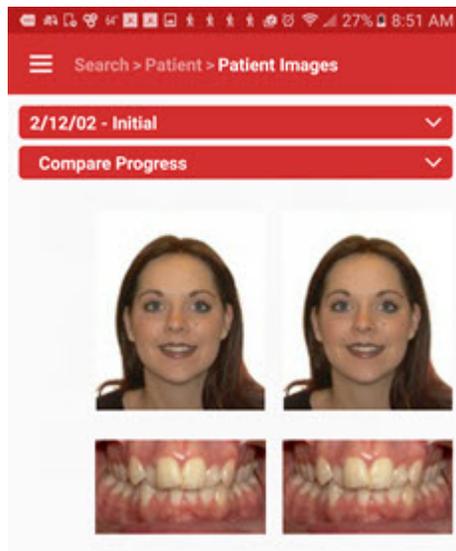
To view patient images from Dolphin Mobile:

- 1 Access the [Patient](#) screen as described in [“View Patient Information” on page 30](#).
- 2 Touch the patient image.

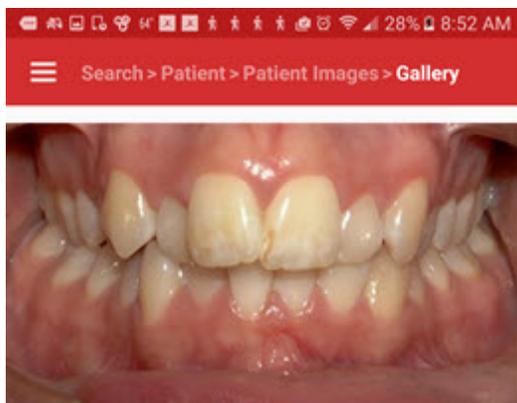
The following screen opens:



- 3 From this screen, touch the first down arrow to select a different timepoint (defaults to most recent).
- 4 Touch the second down arrow to view a menu of different image layout options. (The example below shows the [Compare Progress](#) layout.)



- 5 Drag with a single touch to pan left and right to see more images, if necessary.
- 6 Tap on any image to see it in more detail:



- 7 Swipe left or swipe right to view the next and previous images respectively.
- 8 Double-tap an image to zoom in on a specific area; then use multi-pinch zooming.
- 9 Drag one finger across the screen to pan a zoomed image.
- 10 Double-tap the image again to exit the zoom function and return to a normal view of the selected image.
- 11 Press the Android Back button again to return to the layout view. On iOS, press the Done button at the top left corner.

Superimpose Patient Images

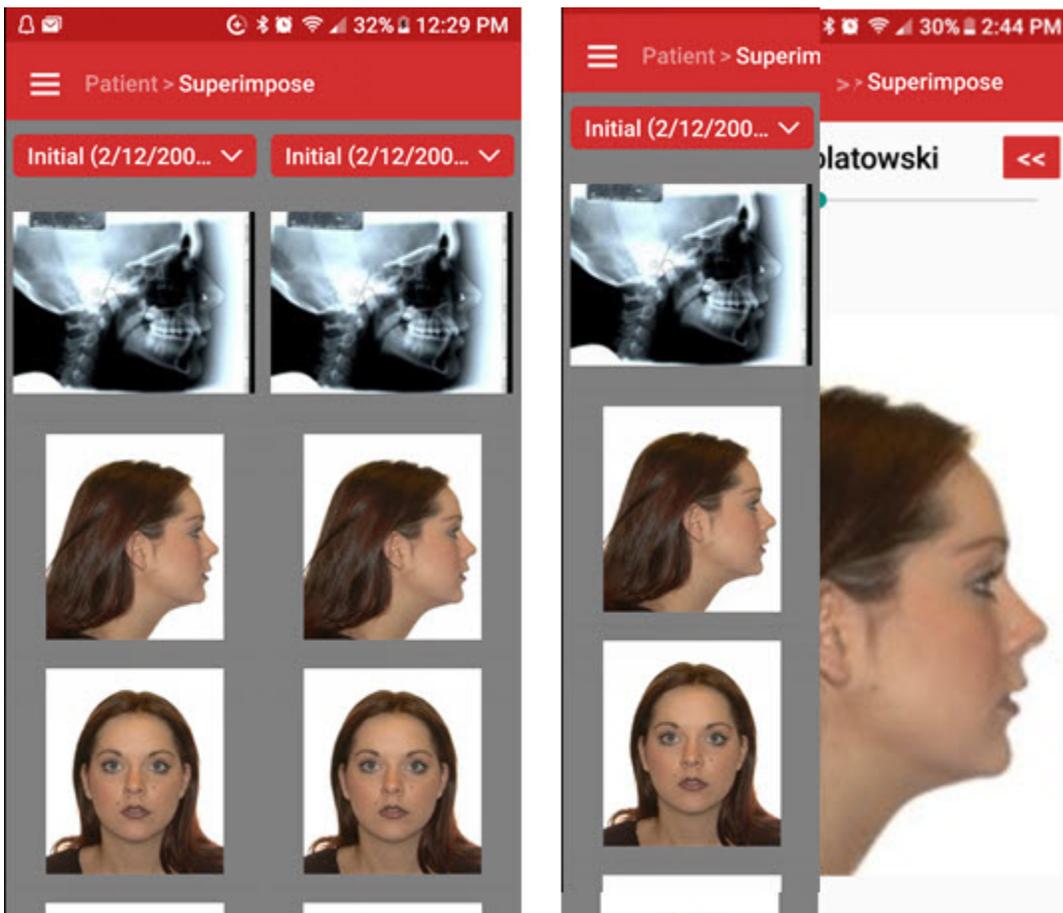
Use the Superimpose menu to view patient images in a side-by-side layout, which enables you to compare images from different time points and view an image with an overlay:

- 1 From the **Patient** screen, touch **Superimpose**.

Or

From the **Patient Images** screen touch , and then touch **Superimpose**.

The Superimpose layout opens in a side-by-side view.



- 2 Optional: To change the time point, touch the  to open the Choose a Timepoint screen, where you can touch the time point to which you want to change.
Or,
Swipe left or right to navigate between timepoints.
- 3 Touch the image you want to view.

The image you selected opens on the side of the screen where you selected it.
- 4 Touch an image on the other side to overlay it over the first image you selected.

- 5 Touch **Pan/Zoom** so you can switch from one active image to another.

In the screen shot below, a dark blue line around the image, and around the image icon indicates the active image.

- 6 Touch one of the image icons to make it the active image.
7 Touch and drag to pan and scale the active image to position the overlay.

You change the active image at any time but touching the icon associated with the image you want to pan and scale.

- 8 Touch and drag the  to change the opacity of the overlay.



- 9 Touch the **<<** or the **>>** to return to the previous screen, or touch both double arrow keys to return to the side-by-side layout.

Share Image Layouts

You can create, save, and print image layouts directly from Dolphin Mobile. Once the a JPEG file of the image layout is saved, save the file, share it with a contact, or print it directly from Dolphin Mobile, if your mobile device is set up for printing.

To save and share an image layout:

- 1 From the **Patient Images** screen, select any layout image except <All Images>.
- 2 Touch , and then touch **Share Layout Image**.

A message is displayed while Dolphin Mobile builds a vertical JPEG of the image. You can now use the sharing options on your mobile device.

View Ceph Tracing and Measurements

If any of the images on the main Patient Images screen has this icon attached to it () , it means ceph tracing is available for that image.

To view Ceph Tracing:

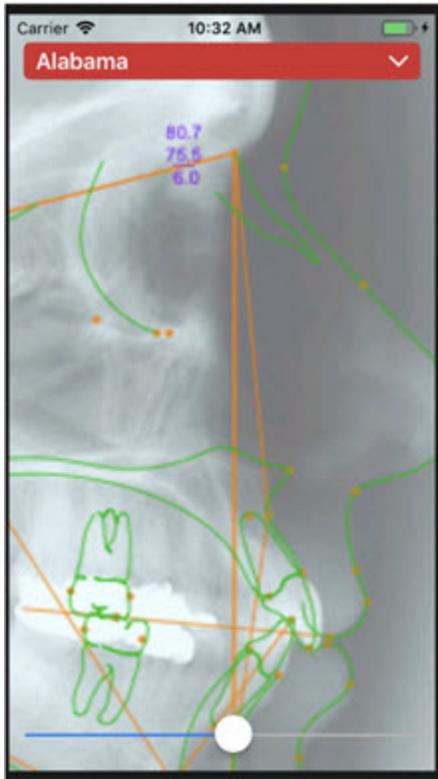
- 1 Touch the image with the ceph tracing icon.
- 2 When the image opens, you can zoom in, zoom out, and pan.

If the  icon appears on the image, you view a list of patient measurements.

To view patient measurements:

- 1 Touch the  .

The following screen shots show a zoomed-in ceph tracing and a list of measurements:



Carrier 10:33 AM

Tracing > Measurements

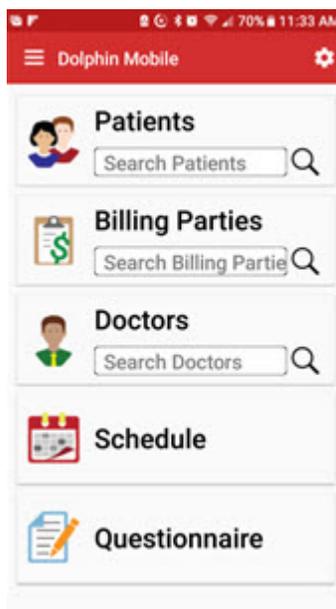
Group/ Measurements	Norm	Std Dev	Value	Dev Norm
SNA (°)	82.00	3.50	80.71	-0.37
SNB (°)	80.90	3.40	75.46	-1.60 *
ANB (°)	1.60	1.50	5.25	2.43 **
Facial Plane to SN (SN-NPog) (°)	80.00	4.00	75.25	-1.19 *
Y-Axis (SGn-SN) (°)	67.00	5.50	72.25	0.95
MP - SN (°)	33.00	6.00	42.92	1.65 *
Occ Plane to SN (°)	14.40	2.50	19.71	2.13 **
Occ Plane to A-B (°)	88.90	4.00	87.00	-0.47
U1 - Occ Plane (°)	57.00	7.00	60.21	0.46
U1 - NA (°)	22.80	5.70	19.36	-0.60
U1 - SN (°)	102.70	5.50	100.07	-0.48
U-Incisor Protrusion (U1- APo) (mm)	6.00	2.20	37.78	14.45 *****
U1 - NA (mm)	4.30	2.70	19.23	5.53 *****
L1 - NB (mm)	4.00	1.80	38.32	19.07 *****
L1 - SN (°)	57.50	8.50	39.67	-2.10 **

Using Dolphin Mobile if You Have Dolphin Management

This section describes how to use Dolphin Mobile to access and view data from Dolphin Management.

- 1 On your mobile device, touch the Dolphin Mobile icon.
- 2 When prompted, enter your Dolphin Mobile passcode.

The Dolphin Mobile screen opens.



Set up and Use Patient Sign-in

Patients can now sign in to your practice using Dolphin Mobile running on a tablet or smart phone, and staff can also sign-in patients using a mobile device.

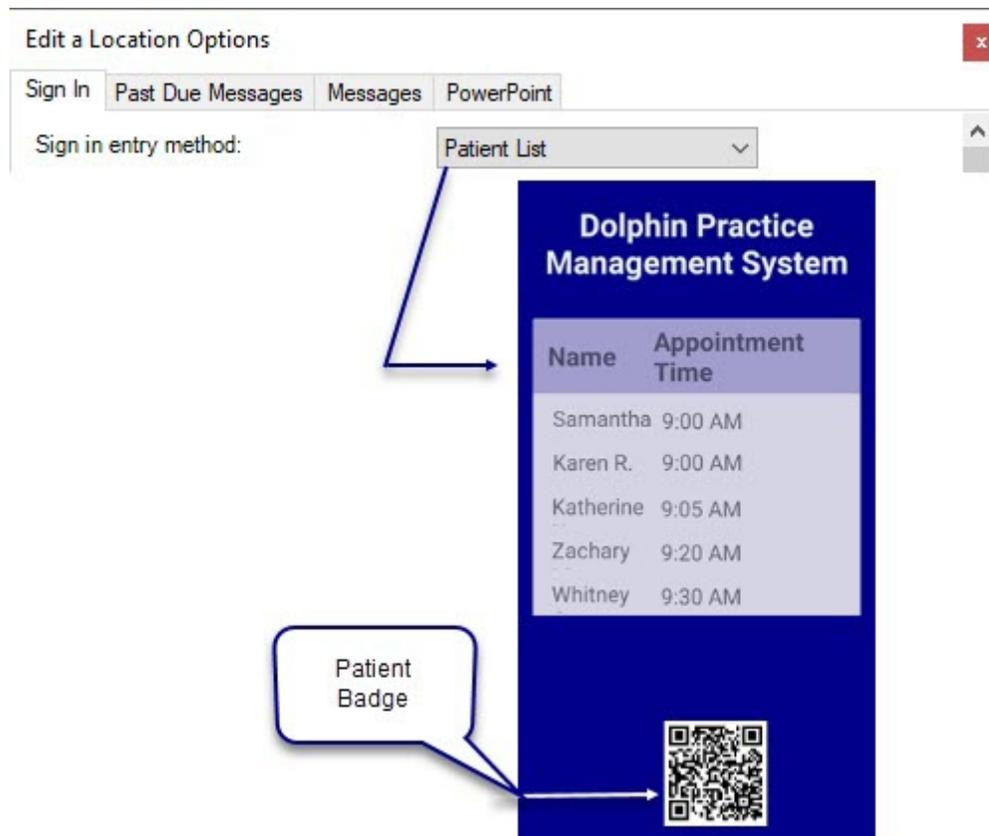
You must first set up this feature in Dolphin Management as described below:

- 1 From the [Edit](#) menu, select **Practice-->Locations**.
- 2 If you have more than one practice location, select the location for which you want to configure patient sign-in.

The [Edit a Location](#) dialog box opens.

- 3 Click the [Options](#) button.
- 4 On the [Sign-in](#) tab, [Sign-in entry method](#) field, select one of the following:
 - [Keyboard Only](#) (Patients key in their names.)
 - [Patient List](#) (to show a list of appointments)

Both methods also provide the option for patient badge scan-in as well.



The other fields on the [Sign-in](#) and [Messages](#) tabs are where you set the background color, and font sizes, and they are described in the Dolphin Management online help and Dolphin Management User's Guide.

- 5 Log into the mobile device that your practice wants to use for patient sign-in.
- 6 From the home screen, touch the  button to access the main menu.
- 7 On the main menu, touch [Patient Sign-in](#).

Note: *If you are not using a tablet, you may see a Warning message. Touch [OK](#) on this message. While the patient sign-in feature works best on a tablet, we support it on mobile phones as well.*
- 8 Choose a location, if prompted to do so.

- 9 Choose the sign-in mode:
- **Kiosk** for patients to sign themselves in.
 - a Touch **OK**.

Patient sign-in is set up and ready to use. If your device has a forward-facing camera and it is running Dolphin Mobile v7 and above, it will scan the patient's badge or QR code shown in Dolphin MyOrthodontist. If your device does not have a forward-facing camera, patients simply use their MyOrthodontist scanner to scan the QR code shown on the sign-in screen.

- **Staff** for staff to sign in patients.
 - a Touch **OK**.

A list of patients, their date of birth and appointment time is displayed on the mobile device.

- b Touch the name of the patient you want to sign-in.
- c When prompted, touch **Confirm** to sign in the patient to your practice.

View Patient Information

To view patient information from Dolphin Management:

- 1 Touch the Patients search box.

The following screen opens:

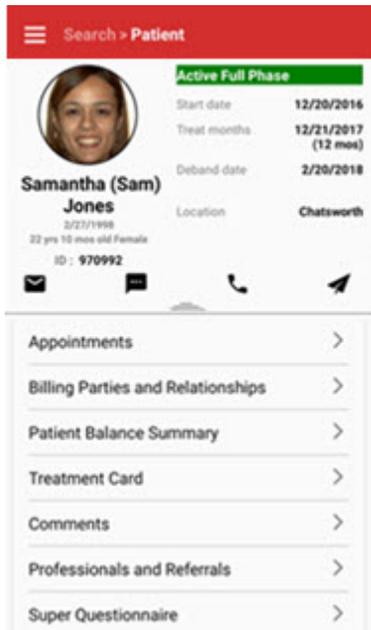


- 2 Touch the letters on the keypad to enter the name of the patient you want to view.
- 3 Touch the search button.

Dolphin Mobile displays a list of names that match what you entered on the keypad:

- 4 Touch the name of the patient whose information you want to view.

The patient information screen opens:



From the [Patient](#) screen you can access:

- If you also have Dolphin Imaging installed, images of this patient, including side-by-side layout, cephalometric tracing, measurements, and image superimposition
 - Note:** *Dolphin Mobile displays patient images and cephalometric tracings for convenient reference. However, patient diagnosis and treatment decisions should be made using only the full Dolphin Imaging software on a desktop computer.*
- Demographic information
- Appointment history for this patient
- Billing party and relationship information
- Balance summary
- Treatment Card information
- Comments
- Professionals and referrals
- Super Questionnaires
- Documents

From any [Patient](#), [Billing Party](#), or [Doctor](#) screen, you can touch the envelope, messaging, or phone icons to email, send a text message, or call this person.

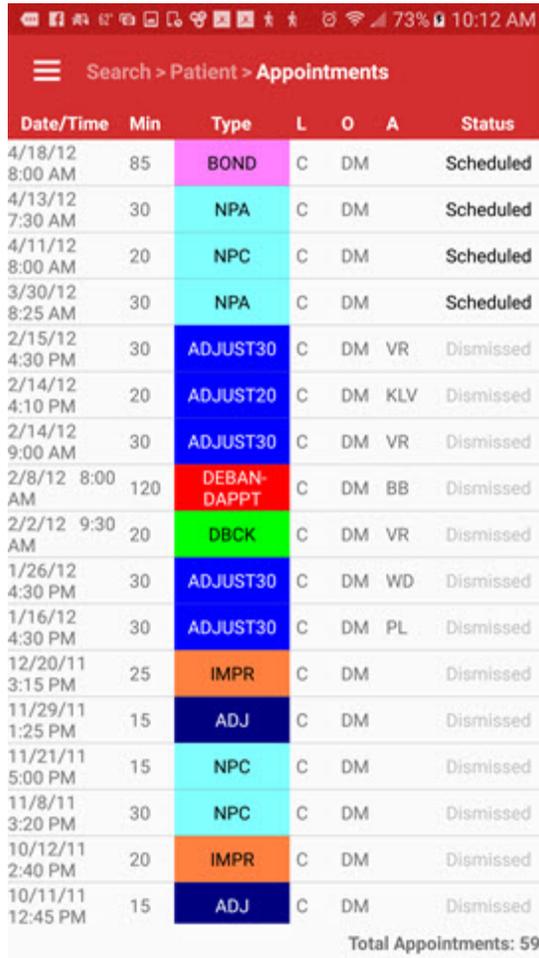
Additionally, if you are running Dolphin Management 10.6, and your practice is licensed for MyOrthodontist and/or Premium 2-Way SMS, you can touch the paper airplane icon to open the SMS Messaging Center. For more information see “SMS Messaging Center” on page 70.

To view images of this patient, touch the patient image shown, and follow the directions in [“View Patient Imaging Data”](#) on page 40.

To view this patient's appointment history and information:

- 1 Touch the **Appointments** text:

The **Appointments** screen opens:



Date/Time	Min	Type	L	O	A	Status
4/18/12 8:00 AM	85	BOND	C	DM		Scheduled
4/13/12 7:30 AM	30	NPA	C	DM		Scheduled
4/11/12 8:00 AM	20	NPC	C	DM		Scheduled
3/30/12 8:25 AM	30	NPA	C	DM		Scheduled
2/15/12 4:30 PM	30	ADJUST30	C	DM	VR	Dismissed
2/14/12 4:10 PM	20	ADJUST20	C	DM	KLV	Dismissed
2/14/12 9:00 AM	30	ADJUST30	C	DM	VR	Dismissed
2/8/12 8:00 AM	120	DEBAN-DAPPT	C	DM	BB	Dismissed
2/2/12 9:30 AM	20	DBCK	C	DM	VR	Dismissed
1/26/12 4:30 PM	30	ADJUST30	C	DM	WD	Dismissed
1/16/12 4:30 PM	30	ADJUST30	C	DM	PL	Dismissed
12/20/11 3:15 PM	25	IMPR	C	DM		Dismissed
11/29/11 1:25 PM	15	ADJ	C	DM		Dismissed
11/21/11 5:00 PM	15	NPC	C	DM		Dismissed
11/8/11 3:20 PM	30	NPC	C	DM		Dismissed
10/12/11 2:40 PM	20	IMPR	C	DM		Dismissed
10/11/11 12:45 PM	15	ADJ	C	DM		Dismissed

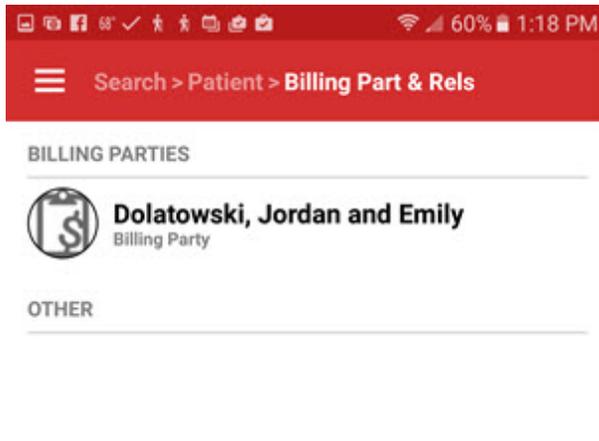
Total Appointments: 59

- 2 To return to the **Patient** screen, touch **Patient>**, or touch the Back button if you are using an Android device.
- 3 To view more demographic information about this person, touch and drag the _____

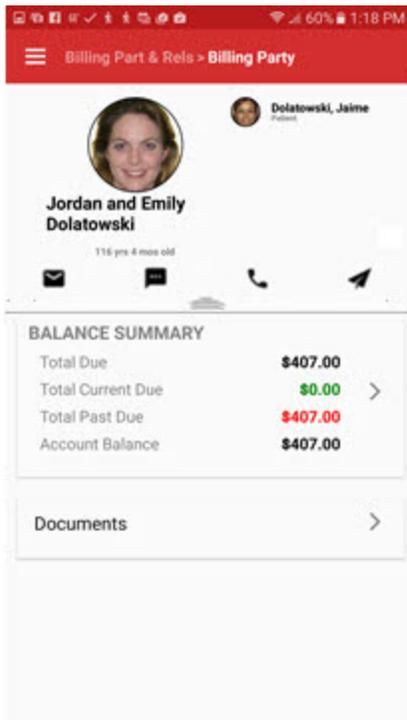
To view information about billing parties and relationships this patient has with other entries in your database:

- 1 From the **Patient** screen touch **Billing Parties and Relationships**.

The following screen opens:



- 2 Touch the person for whom you want to view more information. (In the example below, the billing party was selected.)



- 3 Touch the envelope, messaging, or phone icons to email, send a text message, or call this billing party.

- 4 To view more demographic information about this person, touch and drag the _____ .
- 5 To view a balance summary for this billing party, touch the **Balance Summary** text.

The following screen opens:

	Patient	Ins	Total
Current w/o Credits	\$0.00	\$0.00	\$0.00
Credits	\$0.00	\$0.00	\$0.00
Current w/ Credits	\$0.00	\$0.00	\$0.00
Over 30	\$0.00	\$0.00	\$0.00
Over 60	\$0.00	\$0.00	\$0.00
Over 90	\$0.00	\$0.00	\$0.00
Total Due	\$0.00	\$0.00	\$0.00
Total Past Due	\$0.00	\$0.00	\$0.00
Unbilled Balance	\$0.00	\$0.00	\$0.00
Account Balance	\$0.00	\$0.00	\$0.00
Total Contracts/ Benefits	\$0.00	\$0.00	\$0.00

- 6 To return to the **Patient** screen, touch **Billing Party >** and then touch the patient image icon in the right-hand corner of the **Billing Party** screen, or touch the Back button if you are using Android until you get to the **Patient** screen.

To view a balance summary for this patient:

- 1 From the **Patient** screen, touch **Patient Balance Summary**.

The following screen opens:

	Patient	Ins	Total
Current w/o Credits	\$0.00	\$0.00	\$0.00
Credits	\$0.00	\$0.00	\$0.00
Current w/ Credits	\$0.00	\$0.00	\$0.00
Over 30	\$0.00	\$0.00	\$0.00
Over 60	\$0.00	\$0.00	\$0.00
Over 90	\$0.00	\$0.00	\$0.00
Total Due	\$0.00	\$0.00	\$0.00
Total Past Due	\$0.00	\$0.00	\$0.00
Unbilled Balance	\$0.00	\$0.00	\$0.00
Account Balance	\$0.00	\$0.00	\$0.00
Total Contracts/ Benefits	\$0.00	\$0.00	\$0.00

- To return to the [Patient](#) screen, touch **Patient >** or touch the Back button if you are using Android until you get to the [Patient](#) screen.

Treatment Card

To access treatment card information for this patient:

- From the [Patient](#) screen touch the **Treatment Card>** text.

The following screen opens, which shows the ten most recent entries:

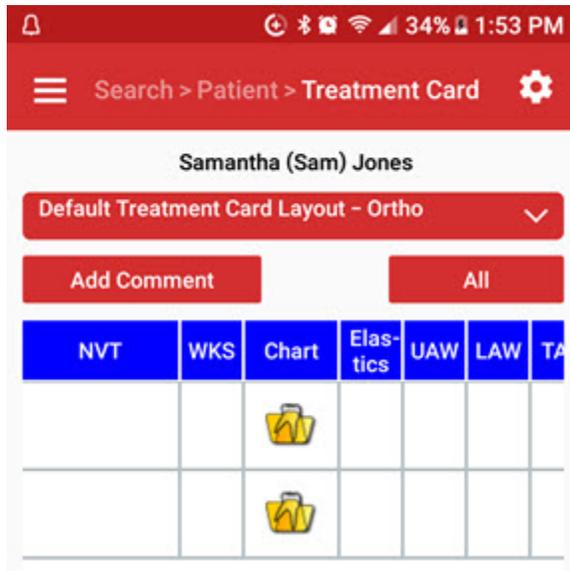
Date	E	ASST	PROC	DR	T
12/25/2010	C	CALLED FROM CONFIRMATION LIST FOR 1/5, LM			
12/30/2010	V	17	60		BOI
1/27/2011	V	23	63 65	1	EVAL UPPER WIRE CI WANTS TO
3/9/2011	V	TR	Wire		Wi
7/9/2011	V	TR	wire	DM	Wi
11/13/2011	V	VR	PROG	DI	f
12/21/2011	V	TM	wire		No wire c
2/21/2012	E				
2/23/2012	C	Aquarium "AAD Test Playlist" Playlist started from			
2/21/2012	N	TR	wire		

- Touch the down arrow to view a different treatment card layout.
- Swipe the screen to view the remaining columns and/or entries on the treatment card.

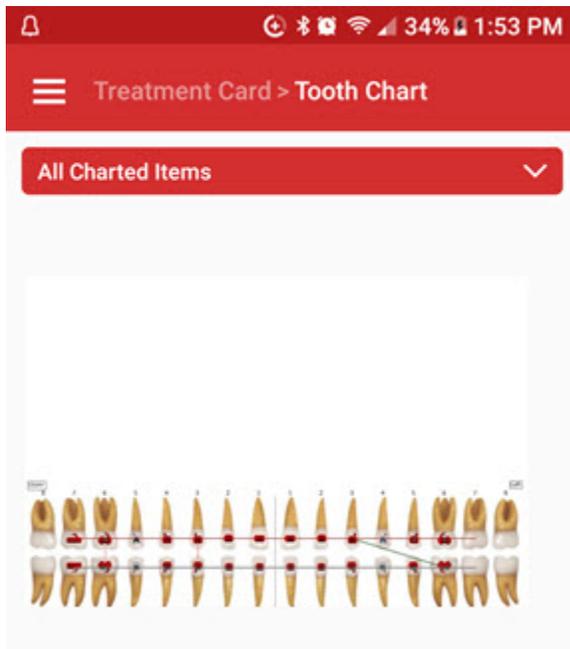
Note: If you do not see all of the treatment card fields you expect, it is because Dolphin Mobile does not display all fields automatically. This enables you to specify which fields you want to see on your mobile device. See "Dolphin Management Treatment Card Settings" on page 100.

To view the tooth chart for this patient:

- 1 Swipe the screen until you see if there is a tooth chart icon on the patient's treatment card, for example:



- 2 Touch the  .



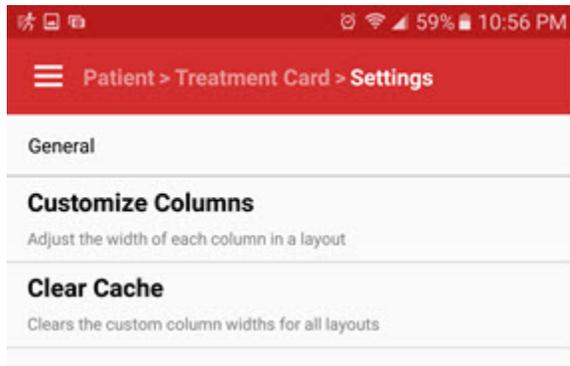
- 3 Optional: Touch the  to change the view of charted items. (All Charted Items is selected by default.)
- 4 Pinch to zoom in or zoom out.

- To return to the [Patient](#) screen, touch **Patient >** .

To customize the width of columns on the treatment card:

- From the [Treatment Card](#) screen, touch  .

The [Settings](#) screen opens.

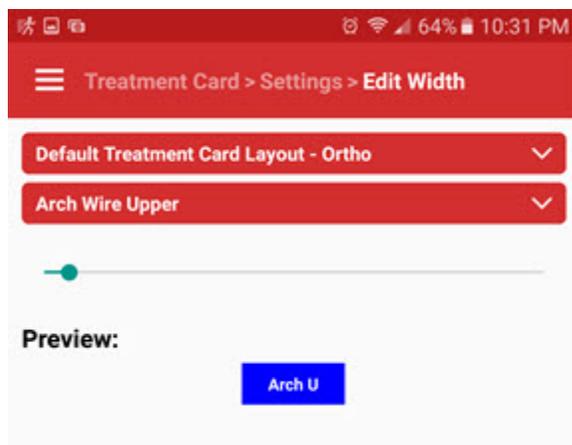


- Touch [Customize Columns](#).

If you have more than layout on this patient's treatment card, Dolphin Mobile prompts you to select a layout.

- Select the layout.

The [Edit Width](#) screen opens:



- Touch the  to open a list of treatment card columns you can resize.
- Touch the column you want to resize. (on the screen above, it is the Arch Wire Upper (Arch U) column.
- Touch and drag the  until the column shown in the [Preview](#) is set to the desired width.

- 7 Repeat the previous 3 steps for each column you want to resize.
- 8 Touch **Settings>** to exit the **Edit Width** screen.

To revert to the previous column width settings:

- 1 On the **Settings** screen touch **Clear Cache**.
- 2 Touch OK on the message box to clear the custom column width settings for all treatment card layouts.
- 3 Touch **Treatment Card >** to return to the patient's treatment card screen.
- 4 To return to the **Patient** screen, touch **Patient >**

Comments

You can add, edit, and delete comments associated with any patient record in Dolphin Management.

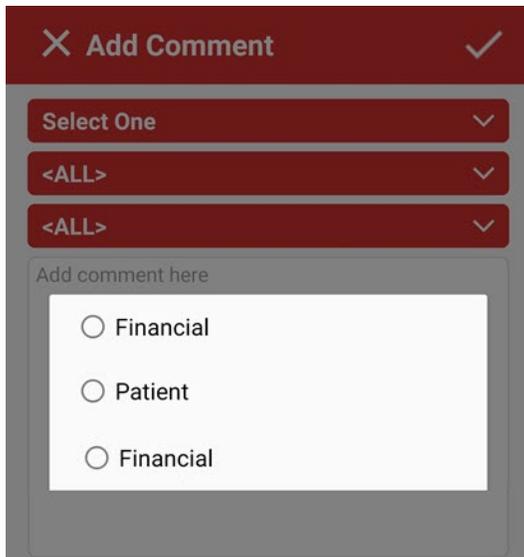
To add a patient comment:

- 1 From the **Patient** screen touch the **Comments>** text.

If the patient record you are viewing has comments, you can view those comments here. If there are no comments, the text **Add comment here** appears in the text box.

- 2 Touch 
- 3 On the **Add Comment** screen, touch the  to select the comment type.

The comment types you can choose from correspond to the comment types available to you in Dolphin Management:



- 4 Touch the radio button next to the comment type you want to add.
- 5 Touch  to select whether this comment applies to one or all billing parties associated with this patient.
- 6 If you are running Dolphin Management with the Specialty Module installed, touch  to select the specialty to which the comment applies.
- 7 Touch [Add comment here](#) to open the mobile device keyboard.
- 8 Enter the comment text.

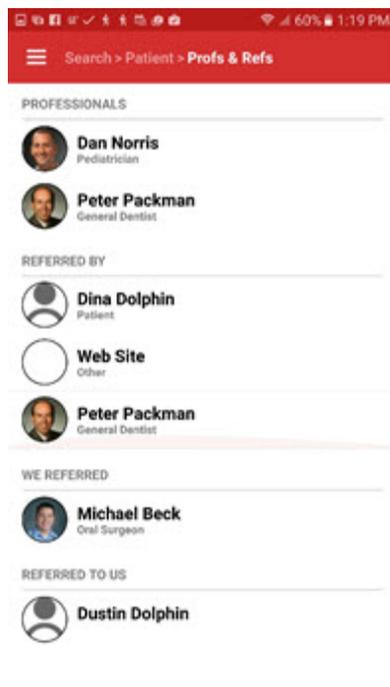
- 9 Touch  to save the comment.

Professionals and Referrals

To view referral information for this patient:

- 1 Touch [Professionals and Referrals](#).

The next screen shows who referred this patient to your office, who you have referred this patient to, if he/she needed to be referred out, who the patient has referred to your office, and what other medical professionals are associated with this patient.

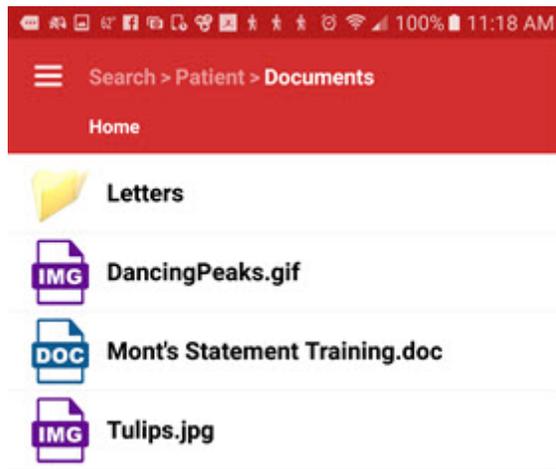


Documents

You can view and sign documents associated with any patient, doctor, or billing party, and you can add documents from your mobile device directly to a person's record in Dolphin Management.

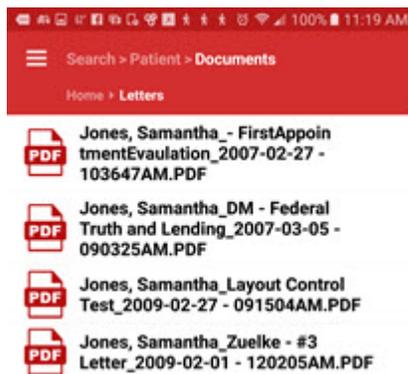
To view documents associated with this person:

- 1 On the [Patient](#), [Doctor](#), or [Billing Party](#) screen, touch the **Documents** button.



- 2 On the [Documents](#) screen touch a folder to open it.

The example below shows the documents that are stored in a folder called [Letters](#).



- 3 Touch the document you want to view.

You may see a message while the document you selected is downloaded to your mobile device.

Before the document opens, your mobile device may prompt you to select a program for viewing the document.

The following example shows a letter opened with a PDF viewer:



Share Documents

To add a document or photo from your mobile device to a person's record in Dolphin Management:

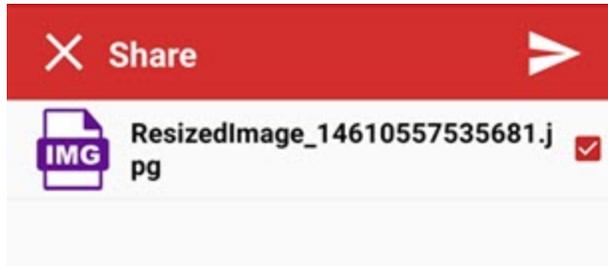
- 1 On the **Patient**, **Doctor**, or **Billing Party** screen, touch the **Documents** button.

- 2 Touch the  .

A screen opens on your mobile device from where you can browse to the documents or images you want to add to Dolphin Management.

- 3 Touch the document or image you want to add.

The **Share** screen opens.



- 4 Touch the  icon to send the selected file to the person's documents folder in Dolphin Management.

Sign Documents

Office staff as well as patients and billing parties (when they are in your office) can sign documents using Dolphin Mobile. When you open a document for signature, you can choose whether it should be signed in Patient Mode (shown below) or Staff Mode.



- 1 From Dolphin Management, add any of the tokens used for signature capture to a document that requires a signature.
- 2 Save this document in the patient's Dolphin Document Organizer.

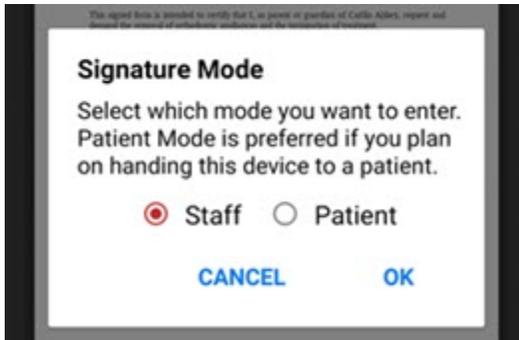
- 3 Open the patient record in Dolphin Mobile, and touch Documents.

When you open a document requiring a signature, the signature icon appears



- 4 Touch the icon to open the signature box.

Dolphin Mobile prompts you to select whether staff or a patient will be signing the document:



- 5 Touch the radio button corresponding to the signature mode you want to use.
- 6 Touch **OK**.
- 7 Use your finger to sign above the signature line.
- 8 You can view the signature in the preview window, and clear and sign again if necessary.



- 9 Once you are satisfied with the signature(s), touch the  to save the signed copy of the document.

View Doctor Information

To view doctor information from Dolphin Mobile:

- 1 Touch the **Doctors** search box.
- 2 On the **Doctor Search** screen, touch the letters on the keypad to enter the name of the doctor you want to view.
- 3 Press the Search button on the keypad.

Dolphin Mobile displays a list of names that match what you entered on the keypad

- 4 If more than one doctor is listed on the next screen, touch the name of the doctor whose information you want to view.

The Doctor screen opens:

Search > Doctor

Peter (Phil) Packman

Starts Last 12 Mos	\$0.00
Starts All Time	\$251,700.00
Payments	(\$152,128.85)
Charges	\$174,149.07

STATISTICS

Unbilled Contracts	\$35,900.00
Unbilled Benefits	\$3,587.50
Patient Total Due	\$15,023.70
Ins Total Due	\$845.00
Unstarted Treatments	\$37,200.00

Doctor Info

Notes:
Good Referral

The [Statistics](#) section shows a summary of billing information for all patients this doctor has referred into the practice.

The [Doctor Info](#) section shows information about this doctor stored on the Dolphin Management [Edit a Doctor](#), [Doctor](#) tab, such as his or her practice name, spouse name and any notes you may have added to this record in Dolphin Management.

- 5 If you searched using the first few letters of a doctor's last name, you can swipe left or swipe right to go to the previous or next doctor meeting that search criteria.
- 6 Touch the envelope, messaging, or phone icons to email, send a text message, or call this doctor.
- 7 To view more demographic information about this person, touch and drag the [Demographics](#) .
- 8 To a list of patients this doctor referred in to your office, touch the [Referred In](#) text.
- 9 To view which patients this doctor referred out of your office, touch the [Referred Out](#) text.
- 10 Touch the [Relationships](#) text to view relationships this doctor has with other entities in your database.
- 11 To view or add documents associated with this doctor touch the [Documents](#) text.
- 12 To view history about this doctor, touch the [History](#) text.
- 13 To view contacts associated with this doctor, touch the [Contacts](#) text.

View Billing Party Information

To view billing party information from Dolphin Mobile:

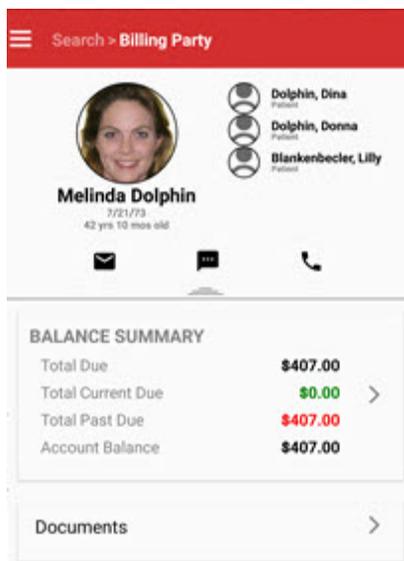
- 1 From the home screen, touch **Billing Parties**
Or

from any screen, touch the  button, and then touch **Billing Parties** from the displayed menu.

When the **Search** screen opens, touch the letters on the keypad to enter the name of the billing party.

- 2 Touch the search button.
- 3 If more than one billing party is listed on the next screen, touch the name of the billing party whose information you want to view.

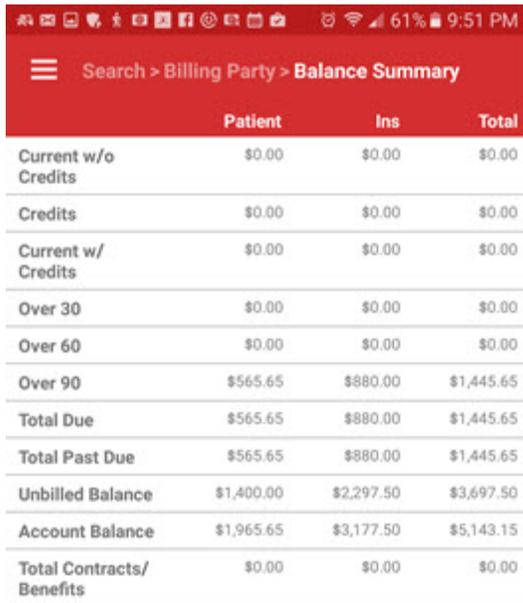
The **Billing Party** screen opens:



Relationships this person has with other entities in Dolphin Management are shown in the upper right corner of the screen.

- 4 Touch any of the entities listed to see more information about that person.
- 5 If you searched using the first few letters of the billing party's last name, you can swipe left or swipe right to go to the previous or next billing party meeting that search criteria.
- 6 Touch the envelope, messaging, or phone icons to email, send a text message, or call this person.
- 7 To view more demographic information about this person, touch and drag the .
- 8 To view a balance summary for this billing party, touch in the **BALANCE SUMMARY** box.

The following screen opens:



	Patient	Ins	Total
Current w/o Credits	\$0.00	\$0.00	\$0.00
Credits	\$0.00	\$0.00	\$0.00
Current w/ Credits	\$0.00	\$0.00	\$0.00
Over 30	\$0.00	\$0.00	\$0.00
Over 60	\$0.00	\$0.00	\$0.00
Over 90	\$565.65	\$880.00	\$1,445.65
Total Due	\$565.65	\$880.00	\$1,445.65
Total Past Due	\$565.65	\$880.00	\$1,445.65
Unbilled Balance	\$1,400.00	\$2,297.50	\$3,697.50
Account Balance	\$1,965.65	\$3,177.50	\$5,143.15
Total Contracts/Benefits	\$0.00	\$0.00	\$0.00

- 9 Touch **Billing Party >** to return to the [Billing Party](#) screen.
- 10 To view documents associated with this billing party, from the [Billing Party](#) screen, touch [Documents](#).

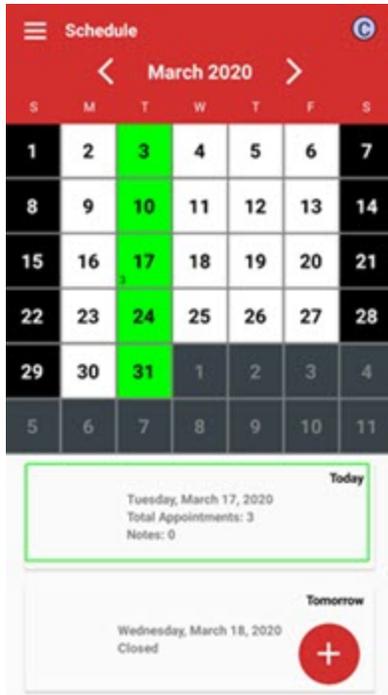
Search and Schedule an Appointment

The schedule feature in Dolphin Mobile is synchronized with Dolphin Management. You can search for and schedule appointments, and the Management calendar will update automatically.

To search for and schedule an appointment from Dolphin Mobile:

- 1 From the home screen, touch  **Schedule** i.
Or
From the Main menu, touch [Schedule](#).

The following screen opens:



- 2 Tap the  button.
- 3 The [Search Patients](#) screen opens.
- 4 Enter the first few letters of the patient's name to bring up a list of patients.
- 5 Touch the patient whose appointment you want to schedule.

The [Search](#) screen opens. This screen provides the same options available on the Dolphin Management [Search Schedule](#)-->[Search Options](#) tab:

Schedule > Search Patients > Search

Search By:

Appt Type Appt Class

Type: ADJUST20

Location: Chatsworth

Provider: Dr. Dolphin

Minutes: 20

Date Range: 3 / 17 / 2020 - 4 / 16 / 2020

Use Patient Preferred Options

Weekdays:

SUN MON TUE WED THU FRI SAT

AM/PM:

A.M. P.M.

Search

6 Touch and key in the desired search criteria.

At a minimum, you must specify an appointment type/class and a location

7 Touch **Search**.

The [Open Reservations](#) list opens. You can page up or down the list to find the desired appointment.

8 Touch the appointment you want to schedule.

The following screen opens on your device:

Patient: **Maclay, Yolanda**
 Date/Time: 3/24/2020 2:30 PM
 Minutes: 15
 Appt Type: ADJ
 Location: Chatsworth
 Chair: 3
 Provider: **Dr. Dolphin**
 Assistant: **Select**
 Note:
 Emergency
 Cancel OK

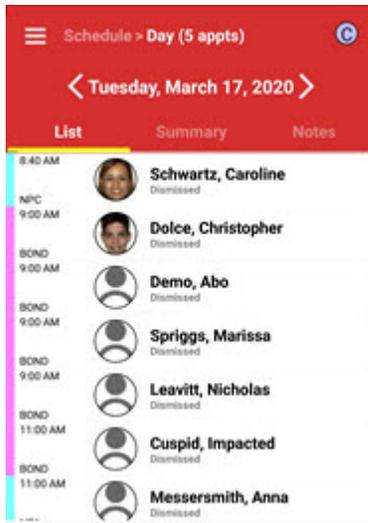
- 9 Optional: Enter any notes you want to associate with this appointment.
- 10 Tap **OK**.

Navigate the Schedule

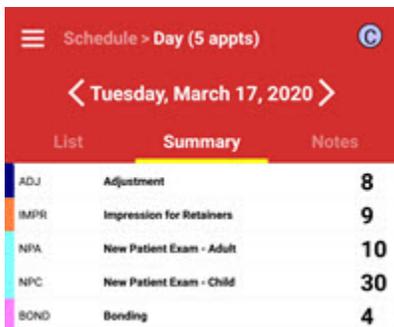
This section describes how to navigate the schedule for viewing purposes.

- 1 From the main Schedule screen, you can:
 - Touch the **<** or **>** to go to the previous or next month, respectively.
 - Swipe right or left to go to the next or previous month, respectively.
 - Swipe up or down to go the next or previous year, respectively.
 - Touch **Tomorrow** to go to tomorrow.
 - Touch **Today** to go to today's date.
 - Touch any day to go to the schedule for that day

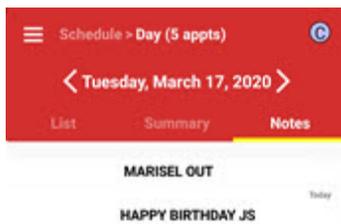
Once you select a day, the appointment **List** for that day opens:



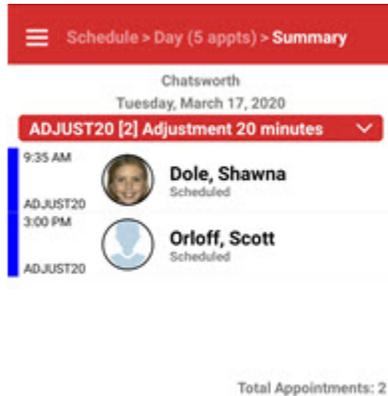
- Optional: Touch **Summary** to view a summary of appointments for that day, sorted by appointment type:



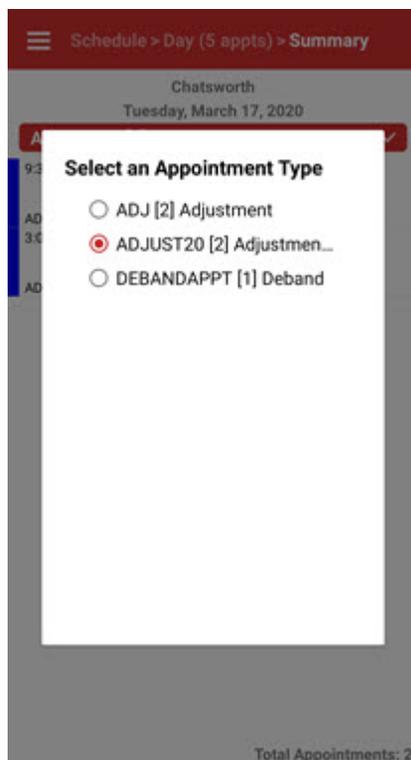
- Optional: Touch **Notes** to view any notes for that day:



- To return to the **List** screen, Touch **List**, or swipe the screen with your finger.
- To return to the calendar view, touch **Schedule >** or press the Back button (if you have an Android device) to get there.
- From the **Summary** screen, touch any appointment type to view a list of all appointments of that type scheduled for this day:



- 7 To change the appointment type you are viewing, touch anywhere on the appointment type title bar.



- 8 Touch the radio button associated with the appointment type you want to view.

SMS Messaging Center

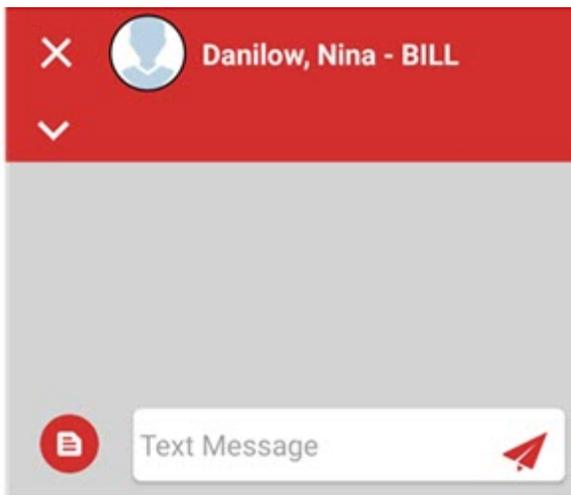
You can access the Dolphin Management [SMS Messaging Center](#) from Dolphin Mobile from either the main menu, or from any entity (patient, doctor, billing party, etc.) for whom an SMS number is provided. SMS numbers are specified in Dolphin Management when you add or edit a phone number for an entity, via the [Phone Number](#) dialog box:

To access the SMS Messaging Center:

- 1 From the main menu, touch **Messaging Center**
Or

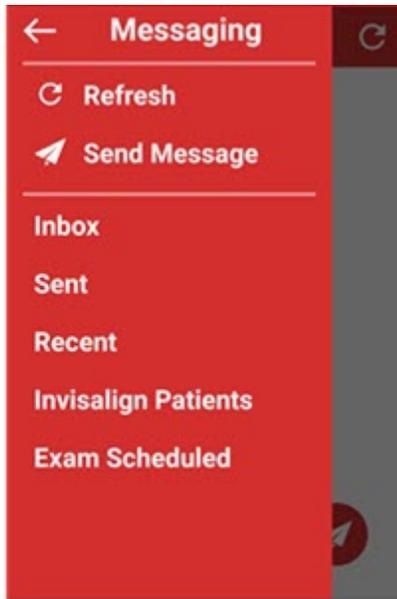
From the first page of any entity record, touch the .

When you access the messaging center from an entity, it opens in context so you can immediately begin typing an outgoing message to that entity:

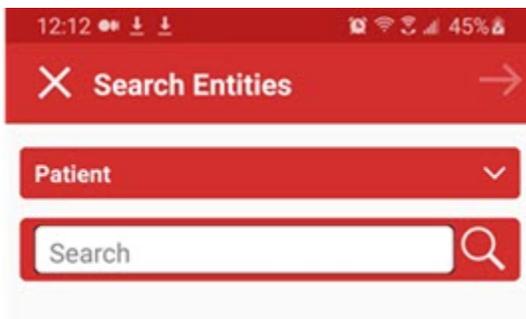


When you open the messaging center from the main menu, it opens on the Inbox screen.

- a Touch the  to access the same mail boxes you have set up in the desktop version:



- b Touch **Send Message** to open the **Search Entities** screen, where **Patient** is selected by default.



- c Touch the  down arrow to open **Choose Entity Type**, and touch to choose from Patient, Billing Party, Doctor, or Employee.
- d Touch and enter information in the Search box until the desired entity is displayed.
- e Touch  .

- 2 Enter the message text, and touch the  to send it.

Light Bar

You can view the Light Bar and move patients from one light bar status to another, specify how many columns you want to view, and what information you want to see for each patient.

When Dolphin Mobile is on the same Wifi as the office, the Light Bar will update in real time. If the device running Dolphin Mobile is out of the office, it updates once per minute, unless the app is running in the background, so it does not use up resources on the mobile device.

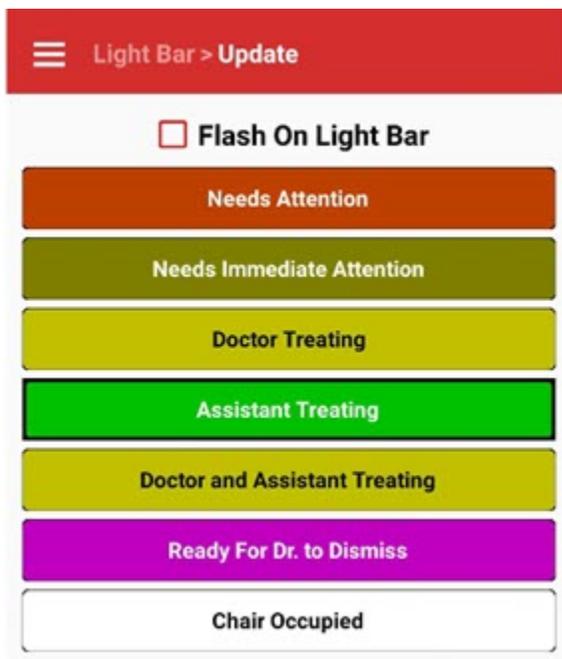
To view the [Light Bar](#):

- 1 From the main menu, touch [Light Bar](#).

To change a patient's lighting system status:

- 1 Open the [Light Bar](#).
- 2 Touch the rectangle corresponding to the patient whose status you want to change.

The [Update](#) screen opens. The patient's current status is outlined in black. In the screen shot below, the selected patient is in [Assistant Treating](#) status.



- 3 Touch the colored bar corresponding to the status to which you want to move the patient.
The Light Bar updates on Dolphin Mobile and on Dolphin Management to reflect this change.

To set Light Bar options:

- 1 Open the [Light Bar](#).
- 2 Touch the  button.

The [Settings](#) screen opens:

Light Bar > Settings

General

Number of Columns for Light Bar

1 2

Show the Priority as Background

Show the Scheduled Minutes Remaining as Background

Show Appointment Type Code

Show Appointment Type Color

Show Patient ID

Show Patient Name

Show Assistant Initials

Show Timers

Save

The settings above are a subset of the options you can access in Management by right-clicking on the Light-Bar, and selecting [Light Bar Options](#) from the pop-up menu.

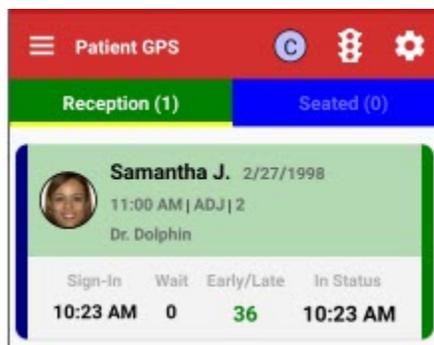
Patient GPS

Providing you have Dolphin Management 10.6 installed, you can access Patient GPS features from Dolphin Mobile. Patient GPS honors the color settings configured in Dolphin Management.

When Dolphin Mobile is on the same Wifi as the office, Patient GPS will update in real time. If the device running Dolphin Mobile is out of the office, it updates once per minute, unless the app is running in the background, so it does not use up resources on the mobile device.

To access Patient GPS:

- 1 From the home screen, tap  to open the main menu.
- 2 On the main menu, tap **Patient GPS**.



To use Patient GPS:

- 1 Swipe the status bar to view a list of patients in each status.

You can see:

- sign-in times
- how long they have been waiting
- how many minutes they were early or late,
- the time they entered the status.

Care Call

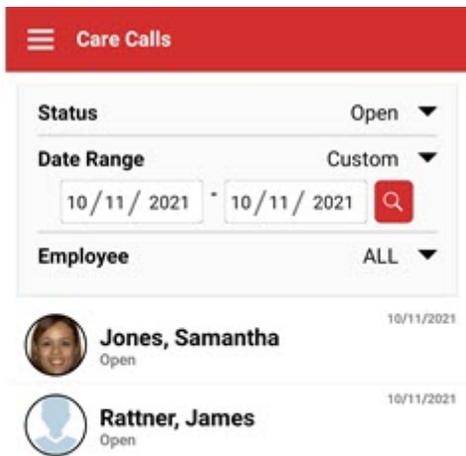
The Care Call feature in Dolphin Management allows doctor or staff to assign follow-up calls for doctors to make after completing a deband or other procedure requiring extra care. Doctors can then access this information on their mobile device, add notes, and even close these calls after office hours.

When you assign a care call from Dolphin Management, that care call is added to the treatment card notes.

To use Care Call:

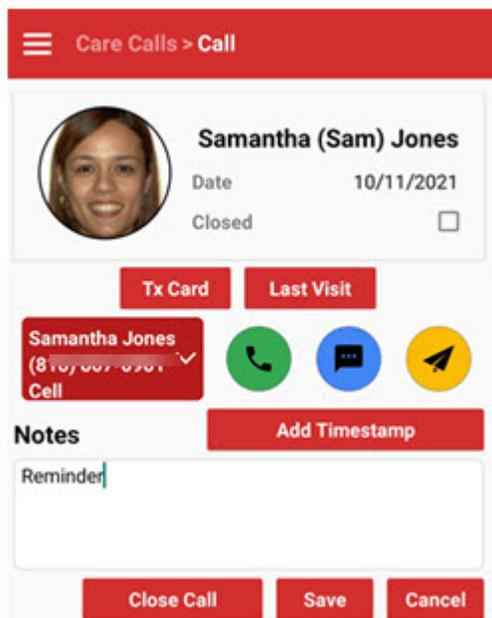
- 1 From the home screen, touch  Care Calls .

The following screen opens:



- 2 Touch each down arrow to filter the calls you view based on the date range or call status or the employee who was assigned to make the call.
- 3 Touch the patient name to view his or her care call.

The patient's [Call](#) screen opens:

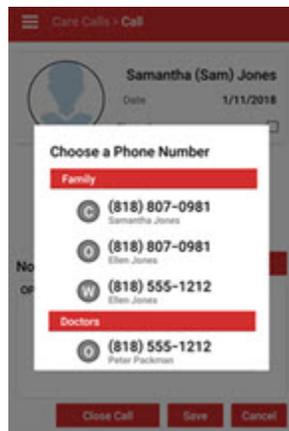


- 4 From this screen you can do any of the following:

- Touch the patient image to view more detailed patient information.
- Touch the **Last Visit** button to view information about this patient's last visit.
- Touch the **Tx Card** button to view this patient's treatment card.
- Tap the patient's name and number to view a list of phone numbers for patient family members and other professionals associated with this patient.

If you are using a device enabled to make calls, you can touch any of the numbers to make a call or add this number to your device's contact list.

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- Touch the  to access your device's text messaging feature.
- Add a time stamp to the **Notes** box.
- Touch the  button to open the message center for this patient.

Note: This feature requires Dolphin Management 10.6 to be installed and your practice to be licensed for MyOrthodontist and 2-way SMS messaging. For more information on the messaging center, see the Dolphin Management User's Guide or online help.

- Close the care call
- 5 Touch the **Save** button to save the care call.

Once you close the care call, a treatment card entry is automatically added indicating that you closed a care call.

Using Questionnaire

You can view, edit, have patients fill out, and sign questionnaires from your mobile device.

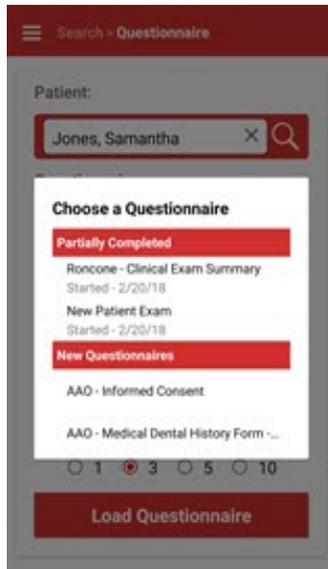
To access a questionnaire:

- 1 From the home screen touch **Questionnaire**
Or
From the main menu, touch **Questionnaire**.

Any patients you had previously viewed are displayed on the **Search** screen.

- 2 Select a patient for whom you want to view a questionnaire.

A list of available questionnaires is displayed.



- 3 Touch the questionnaire you want to view.
- 4 Choose a language style (Layman Adult, Chief Concern, Clinical, Layman, or Dentist) when prompted.
- 5 Choose a time point when prompted.

Search > Questionnaire

Patient:

Questionnaire:
 AAO - Informed Consent

Language Style:
 Layman Adult

Timepoint:
 3/23/12 - Progress

Mode:
 Staff Patient

Questions Per Page:
 1 3 5 10

Load Questionnaire

- 6 From the [Questionnaire](#) screen touch the **Staff** or **Patient** radio buttons to specify the viewing mode.
- 7 Touch the radio button corresponding to how many questions per page you want to view at a time.
- 8 Touch **Load Questionnaire**.

The following screen shows a sample Extraction Request questionnaire in staff mode, with 10 questions per page:

Staff Mode

Please complete the Questionnaire.

Extraction Request

Extractions

Extract upper first premolars: 5, 12

Extract upper second premolars: 4, 13

Extract lower first premolars: 21, 28

Extract lower second premolars: 20, 29

Extract upper third molars

Extract lower third molars

Early extraction of primary teeth:

Extract upper second molars: 2, 15

Extract one incisor: {}

Serial extraction procedures

< ✓ > ✕

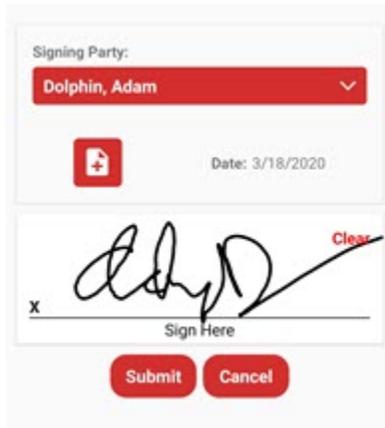
9 Complete the questionnaire on the mobile device.

10 Touch  to sign the questionnaire.

Dolphin Mobile prompts you to choose a signing party.

11 Touch the name of the person who will be signing the questionnaire.

The [Signing Party](#) screen opens:



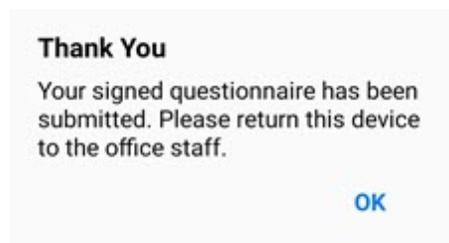
12 Optional: touch  to open the [Note](#) screen where you can tap, and enter any notes you want to associate with this signed questionnaire.

13 Touch **OK** to save your notes.

14 When finished, touch **Submit**.

Once the questionnaire has been submitted, it will open in read-only mode.

If you are a patient filling out the questionnaire, after you touch **Submit** the following message is displayed:



After the patient touches **OK**, Dolphin Mobile returns to the [Enter a Passcode](#) screen.

Office staff enter their passcode, and Dolphin Mobile returns to the questionnaire screen in staff mode for signature and submittal.

Using Treatment Card Image Capture

The capture feature integrates with the [Treatment Card](#) field, [Images \(non-Dolphin Imaging\)](#). You can capture images from Dolphin Mobile (like hygiene) and easily transfer those images to the Dolphin Management, treatment card, [Image \(non-Dolphin Imaging\)](#) field.

Before using the capture feature, you must set up the [Images \(non-Dolphin Imaging\)](#) field in treatment card.

- 1 From Dolphin Management, select **Edit** → **Treatment** → **Treatment Card Setup**, and add the [Images \(non-Dolphin Imaging\)](#) field to each layout to which you want to add captured images from Dolphin Mobile.

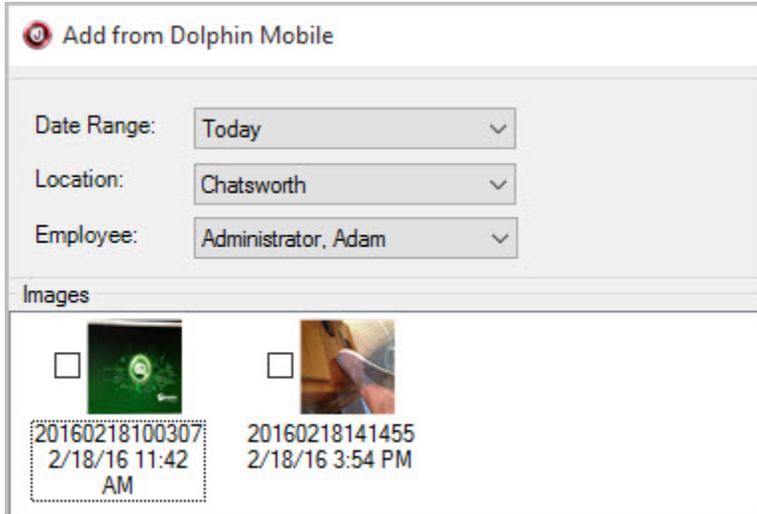
To use Capture:

- 1 From the home screen, touch **Tx Card Image Capture**,
Or,
from any Dolphin Mobile screen touch , and from the displayed list, touch **Tx Card Image Capture**.
- 2 If your server has multiple locations, select the location if prompted.
The device camera opens.
- 3 Take the picture.
- 4 Touch **OK** to save the image to your Dolphin server.
The image is saved.

To add the captured images to a patient's treatment card:

- 1 In Dolphin Management, open the treatment card for the patient.
- 2 On the visit or emergency entry, click the image icon in the [Images \(non-Dolphin Imaging\)](#) column.
The [Entity Images](#) dialog box opens.
- 3 Click the **Add from Mobile** button.
- 4 On the Add from Dolphin Mobile screen, click to select the image.
- 5 Click **OK**.

The [Entity Images](#) screen opens where you can edit the image, before saving it in the patient's treatment card.



The image or images you just captured are displayed in the [Images](#) group box.

- Optional, filter the list using any combination of the following:

- Date Range** Date the image was captured (defaults to today)
- Location** The location selected when the image was captured (defaults to logged-in location)
- Employee** The employee logged in to Dolphin Mobile who captured the image (defaults to logged-in employee)

- Click to check the box next to the image or images you want to add to the patient's treatment card.

Images open in the [Entry Images](#) dialog box, where you can edit them if necessary.

- Click **OK**.

The selected images are attached to the treatment card entry, and an icon with a number indicates how many images are there.



Capture Signature

You can use Dolphin Mobile to capture signatures for:

- Employees
- Patients and employees signing Super Questionnaires
- Signing merged letters using the  **Sign** tool bar button in the Dolphin Letter System (DLS) integration with Microsoft Word

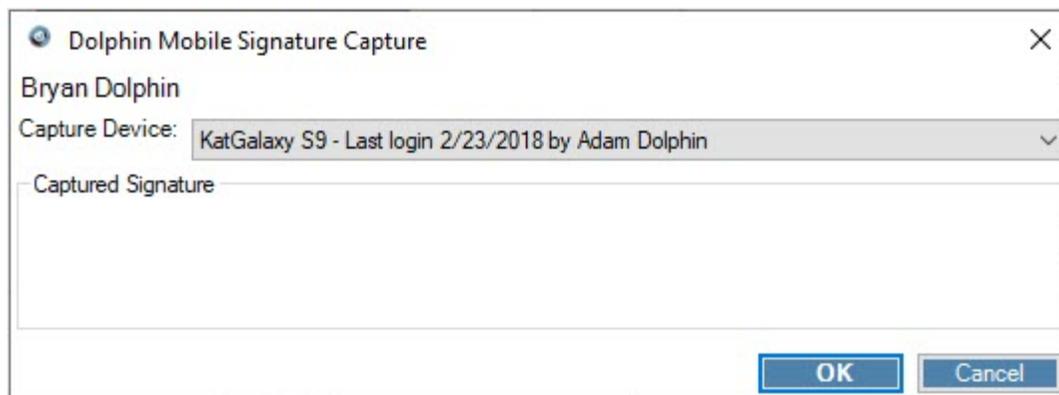
To set up Dolphin Mobile as a signature scanner:

- 1 In Dolphin Management, select **Plug ins** from the **Edit->General** menu.

The **Plug-Ins Configuration** dialog box appears:

- 2 In the **Plus-In Types** group box, select **Signature Scanner**.
- 3 Click .
- 4 Select **Dolphin Mobile Signature Capture**.
- 5 Click **OK**.

To capture a new signature using Dolphin Mobile:



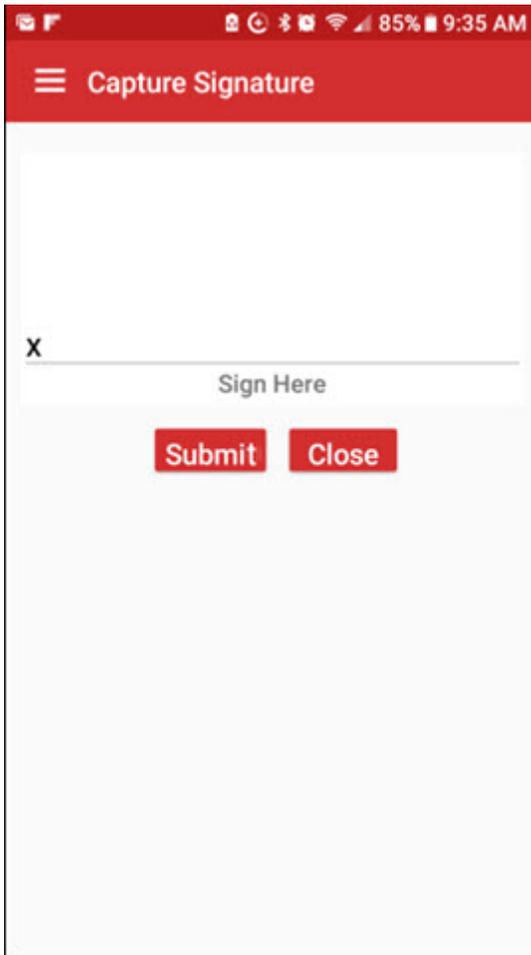
- 1 On the **Dolphin Mobile Signature Capture** dialog box, ensure that the device you want to use is listed in the **Capture Device** drop-down menu.
- 2 From Dolphin Mobile, access the **Capture Signature** screen.
- 3 Sign, or have the person sign on the signature line.
- 4 Touch the **Submit** button.

The new signature appears in the **Captured Signature** box in Dolphin Management.

- 5 Click, **OK** to add the new signature to the **Signature** list box of the entity you are editing.

You can capture staff signatures and have them become part of the employee record in Dolphin.

- 1 From the Dolphin Mobile main menu, touch **Capture Signature**.



- 2 Sign, or have the logged-in staff member sign.
- 3 Touch **Submit**.

The employee record in Dolphin is updated with this signature.

Call, Text, Email, or Capture an Image of an Entity

This chapter describes how you can call, text, or email an entity in your database, or capture an image of an entity in your database. This chapter applies to both Dolphin Imaging and Dolphin Management installations.

Call a Patient, Doctor or Billing Party

If you are running Dolphin Mobile on a mobile device that supports calling, you can call the patient, doctor or billing party from their respective screens.

To call a patient, doctor, or billing party:

- 1 From the [Patient](#), [Doctor](#) or [Billing Party](#) screen, touch the  button.

The standard dialing screen is displayed, and the default phone number for that patient, doctor, or billing party is automatically dialed.

Text a Patient, Doctor or Billing Party

If you are running Dolphin Mobile on a mobile device that supports texting, you can text the patient, doctor or billing party from their respective screens.

To text a patient, doctor, or billing party:

- 1 From the [Patient](#), [Doctor](#) or [Billing Party](#) screen, touch the  button.

The standard texting screen is displayed, and the default phone number for that patient, doctor, or billing party is automatically entered.

Send Email

Dolphin Mobile allows you to email a patient, doctor or billing party from their respective screen.

To email a patient, doctor, or billing party:

- 1 From the [Patient](#), [Doctor](#) or [Billing Party](#) screen, touch the  button.

The standard mobile device email screen is displayed, with the patient, doctor, or billing party's email address already completed.

- 2 Enter text for the subject and body of the message.
- 3 Touch the [Send](#) button.

Capture Patient Images

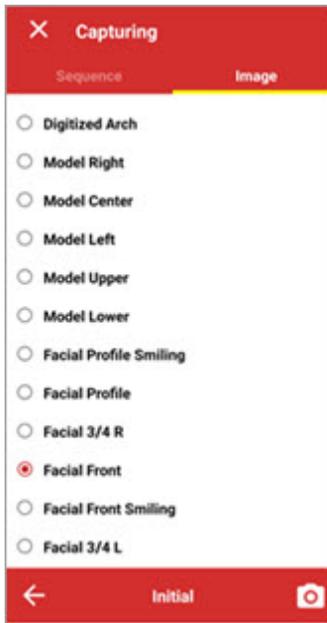
To capture an image of a patient (if you have Dolphin Imaging):

- 1 Navigate to the patient whose image you want to capture
- 2 Touch the image icon to open the [Patient Images](#) screen.
- 3 Touch the camera icon.

The [Timepoint](#) screen opens.

- 4 Do one of the following:

- If no timepoints exist for this patient, touch the  to add one.
 - a On the [New Timepoint](#) screen, touch the timepoint or enter a new one.
 - b Optional: touch the Calendar icon if you want to select a different date to associate with this timepoint.
 - c Touch  to save the timepoint, which returns you to the [Timepoint](#) screen.
 - d Touch the  to open the [Capturing](#) screen.
- If one or more timepoints exist, touch the one you want to use, and then touch the  to open the [Capturing](#) screen. t



- 5 Touch the **Image** tab, and select the Image type (**Facial Front**, for example).
- 6 Touch the camera icon again to open the camera on your mobile device.
- 7 Optional: If you want to use grid lines to make taking the picture easier, touch the , and select from one of the following:
 - o **No Grid** (the default)
 - o **3x3 Grid**
 - o **4x4 Grid**
 - o **Golden Ratio Grid**
- 8 Touch the shutter button on your device to take the picture.

You can now touch **OK** to save the image, and upload it to Dolphin Imaging when prompted, or you can modify the image as described in [Modify Patient Images](#) below.

Modify Patient Images

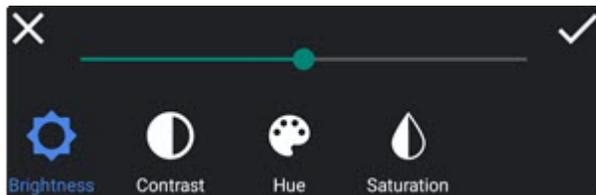
Once you take a picture, Dolphin Mobile provides several tools for editing it before you upload it to Dolphin Imaging.



- 1 To modify a patient image, do one or more of the following:
 - o Touch the **Crop** tool to crop the picture.
 - a When the crop lines appear, drag them to crop the picture.

- Touch the **Flip** tool to change the orientation of the image.
- Touch the **Mirror** tool to create a mirror images.
- Touch the **Adjust** tool to change the brightness, contrast, hue or saturation of the image.

The following controls appear at the bottom of the image:



- Touch the tool you want to use.
 - Drag the slide bar until you achieve the desired result.
 - Touch the to save your changes, or touch the to exit the adjustment controls without saving your changes.
- Touch **OK** to save the image.
 - Upload the image or images to Dolphin Imaging when prompted.

Capture Entity Images

If your mobile device has a camera, you can take pictures of any non-patient (doctor, billing party, etc.), save it, and upload it to the Dolphin server to which you are connected.

To capture and assign an image to a non-patient entity in your database (If you have Dolphin Management):

- From any doctor, billing party, or non-patient screen, touch the existing default image for that person.

This opens the camera app on your device

- Take the picture.

The camera on your mobile device should provide options to save or retake the picture. Once you are satisfied with the picture, save it, and continue with the next step.

- When the **Save as** screen opens do one of the following:

- Touch the **Default** button to make the new image the default image.

The default image replaces the previous default image of this person in Dolphin Mobile. If the person is a doctor or billing party, the new default image is copied to that person's record in Dolphin Management.

- Touch the **Save** button to save the image.
- Touch the **Cancel** button to cancel out of the camera app and return to the previous screen.

Using Dolphin Mobile with Dolphin Aquarium

Dolphin Mobile provides a subset of Dolphin Aquarium features for users who have Dolphin's case presentation software installed on their server.

The instructions here apply whether you use Dolphin Aquarium only or if you have one or more other Dolphin products installed.

Note: *Aquarium-only users may see icons for Dolphin Imaging and Dolphin Management on their mobile devices; only the Aquarium icon is active.*

To access Dolphin Aquarium:

- 1 From the Dolphin Mobile home screen, touch  **Aquarium** .
Or,
From a Patient screen, touch **Aquarium**.

The Dolphin Aquarium main screen opens.



From the main screen you can:

- If you opened Aquarium from a patient, share Aquarium media with that patient.
- Filter which media you see by Diagnoses, Treatment, Aquarium Library or any keyword you enter in the search window.
- Play Aquarium movie clips and view stills
- Play Aquarium playlists

To share Aquarium media with a patient:

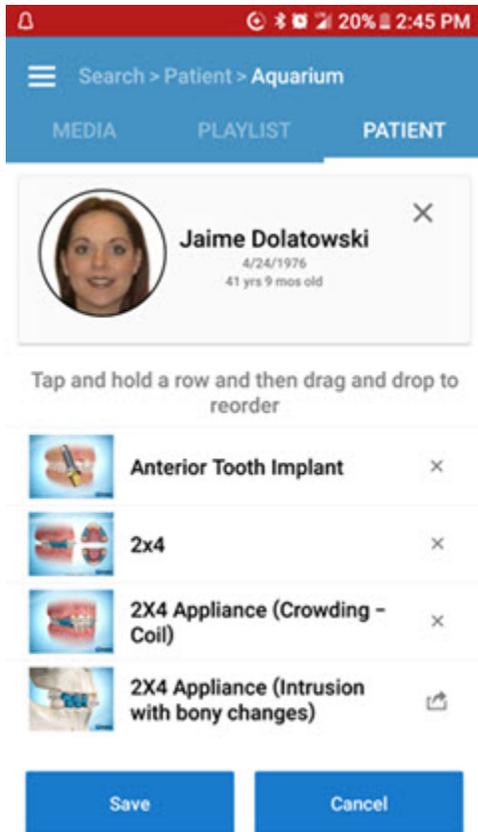
- 1 Touch the  icon to next to each movie listed that you want to share with the selected patient.

For each movie you share, the  icon is replaced with .

- 2 To see list of movies shared with the patient, touch .
- 3 To remove a movie shared with the patient touch the  next to the movie you want to remove.

When you share media with a patient, it becomes part of that patient's Shared Media library on Aquarium desktop, and any media you shared on Aquarium desktop, you can access on the that patient's  page on Dolphin Mobile Aquarium. If your patient is running MyOrthodontist, he or she can also view shared Aquarium media through that mobile app.

The  button appears when you have added media to the patient record.

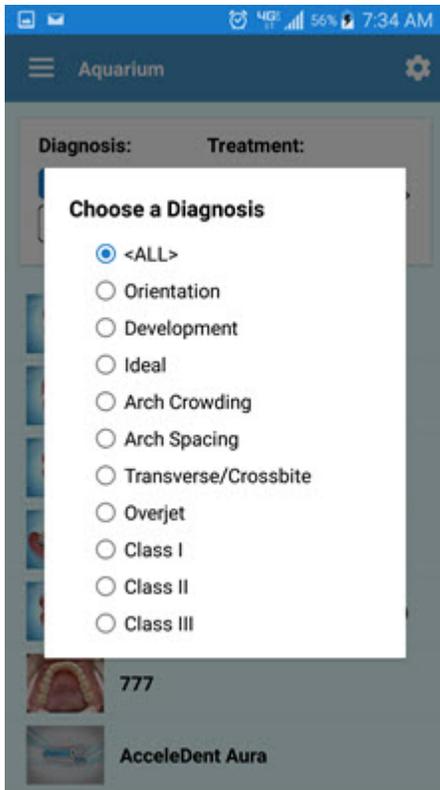


- 4 Touch  to save any changes (deletions or additions) you make to the patient's Shared Media library from Dolphin Mobile.

To filter the Aquarium library by treatment or diagnosis types:

- 1 Touch the  under Treatment or Diagnosis to show a menu by which you can filter.

The following image shows the options under Diagnosis:



- 2 Touch the button corresponding to the diagnosis you want to view.
- 3 Repeat the previous steps using the  under Treatment to filter Aquarium media by treatment.

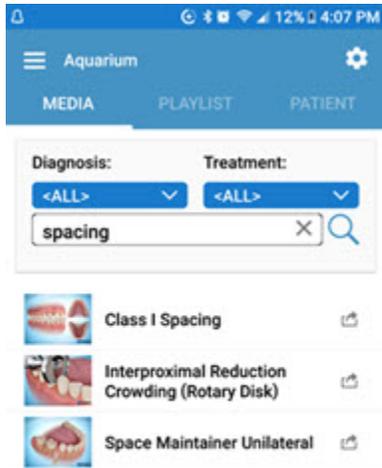
To search the Aquarium library based on a keyword:

- 1 Touch the Search text box:



- 2 When the keypad is displayed, enter the keyword on which you want to search.
- 3 Touch the search button on the keypad to begin the search.

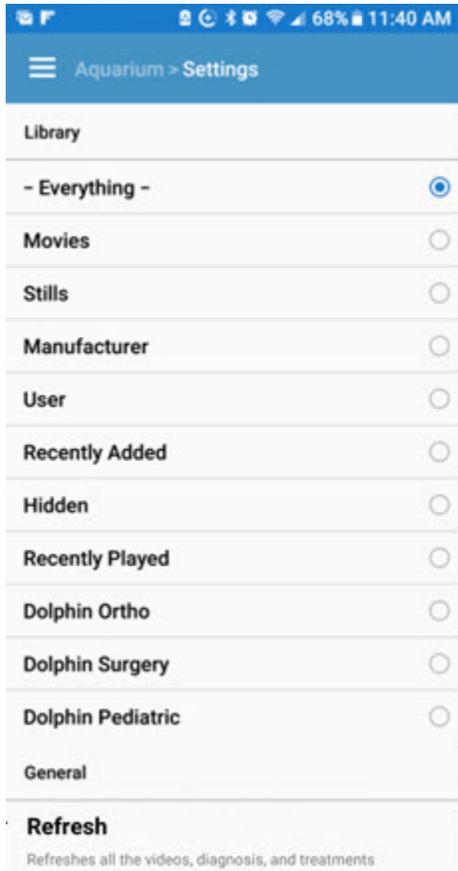
The following image shows what is displayed when you search on the word “spacing.”



To filter the Aquarium library by topic:

- 1 Touch the  button.

A list of your libraries is displayed.



- 2 To select any of these libraries, simply touch the option and you will be returned to the Aquarium page with the contents of only that library displayed.

To play a movie clip or view a still:

- 1 Touch the thumbnail associated with the movie clip or still you want to view.

You may see a message displayed while the media you selected loads.

- 2 While a movie clip is playing, tap it to display the following controls:



Touch to go back; keep touching to start the movie over from the beginning.



Touch to pause or resume play.



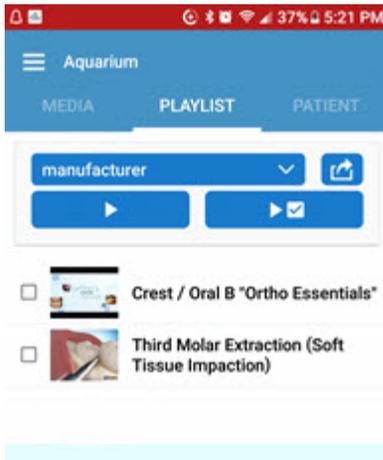
Touch to skip forward.



Touch and drag the button on the timeline bar to scrub.

To play a playlist of Aquarium movie clips and/or stills:

- 1 From the main Aquarium screen, swipe Left to go to the Playlist page.



- 2 Touch the  to select from the playlists currently on the server.
- 3 Touch the appropriate control to play the selected playlist.
- 4 While the playlist is playing, tap it to access the following controls:



Touch to return to the beginning of the movie or previous movie



Touch to go back; keep touching to start the movie over from the beginning.



Touch to pause or resume play



Touch to skip forward.



Touch to skip to the beginning of the next movie.



Touch and drag the button on the timeline bar to scrub.

Virtual Braces

Virtual braces is a marketing tool you can use to show parents and patients what braces will look like on their teeth. This tool has several options, enabling you to show the patient a virtual example of what they would look like with ceramic versus metallic braces, different colors of bands; you can customize the virtual teeth by making them wider or narrower to better match the patient's actual teeth. This feature works on iPhone or iPad X and newer devices equipped with a TruthDepth camera only.

To access Virtual Braces:

- 1 From the main menu, touch **Virtual Braces**.

The Start screen opens.



- 2 With the iPhone camera facing the patient, tap , and have the patient open their mouth.

From the **Virtual Braces** screen, you have the following options available:

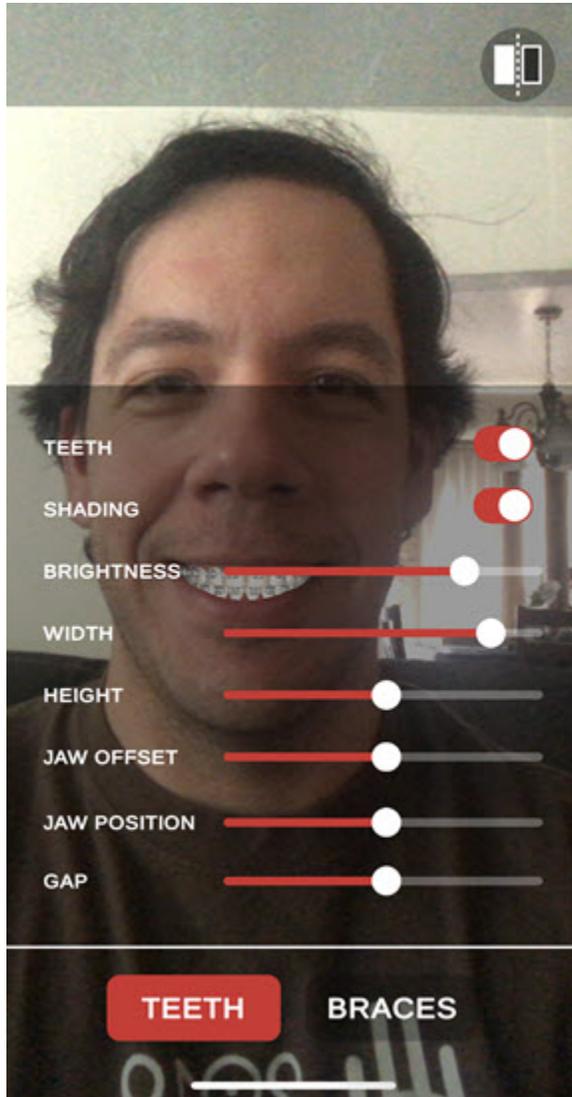
-  - Split the screen as shown in the example below, where half the patient's face shows braces, and the other half does not.



- Tap the left and right arrows to change the split screen view.



- Tap the  to take a picture.
- Tap **BRACES** to open options where you can toggle top braces and bottom braces on or off, select the band color, and specify metallic or ceramic braces.
- Tap **TEETH** to open the options shown below:



Using these options, you can modify the teeth height, width, jaw offset, jaw position, and gap by touching the white circle and sliding it until you achieve the look you want for each.

To exit the virtual braces screen:

- 1 Tap your finger four times on the top left of the screen.

Dolphin Mobile prompts you to enter your passcode to return to the main app screen.

Customizing

This section describes how you can customize Dolphin Mobile, from hiding, showing, or reorganizing the options on the home menu to defining which treatment card fields you want displayed on the mobile app, and how to enable and customize patient sign-in features (Dolphin Management only).

Reorganizing the Home Menu

To hide, show, or simply reorder the options on the home menu:

- 1 From the home menu touch .
Or
From the main menu, touch **Settings**, and then touch **Customize Home**.

A screen opens that shows all of the available home menu options for Dolphin Mobile. Those options with a check mark display in the home menu.

- 2 Touch to check or uncheck the menu item you want to show or hide.
- 3 Touch and hold an option until a box appears around it, then drag and drop it to reorder.
- 4 Repeat the previous step for each menu option you want to move.
- 5 Touch **Save** to save your changes, or **Close** to exit this screen without saving your changes.

Dolphin Mobile Settings Menu

The Dolphin Mobile Settings menu is where you specify global settings for the application. Some of these apply to login options, such as biometrics, and passcodes, and others control application behavior such as logout timeouts, and automatic capitalization.

To access the Settings menu:

- 1 From the home menu, or any other menu touch .
- 2 Tap  **Settings**.



Image Quality



Use the green slider to increase or decrease the image quality.

Logout Timeout



Use the green slider to change the number of inactive minutes after which Dolphin Mobile will log you out.

Phone Number Prefix



Specify a phone number prefix, and toggle on or off.

Show Listed Servers

Enable/disable list of servers to choose from at application launch



For practices with multiple servers, toggle on to show a list of available servers when Dolphin Mobile is launched.

Push Notifications

Enable/Disable Push Notifications



Toggle to enable or disable push notifications.

Disable Clipboard

Prevents use of Clipboard while using Dolphin Mobile



Turn this option on to prevent users from copying and pasting contents inside writeable fields. Use this option when patients are entering information on the mobile device while in your office.

Auto Capitalization



Turn this option on if you want Dolphin Mobile to automatically capitalize the first letter when you enter text, and after a period, question mark, etc.

Clear Cache

Clears the cache of your current server

Tap to clear the cache of the current server.

Edit Passcode

Edit your passcode

Tap to edit the passcode you use.

Biometrics

Toggles of the use of biometrics to login



Toggle biometric login on or off.

Customize Home

Select which options you want to show on the home screen

Tap to open a menu where you can customize the options you see on the home menu. See "Reorganizing the Home Menu" on page 98.

Change Password

Expires :2/24/2018

Change the password you use to log in to both the desktop and mobile versions of Dolphin.

Dolphin Management Treatment Card Settings

Dolphin Management users can control which treatment card fields are displayed on Dolphin Mobile. Not all treatment card fields are displayed in Dolphin Mobile by default, so you can customize which ones you want to see on your mobile device.

From a workstation running Dolphin Management:

- 1 From the **Edit** menu, select **Treatment->Treatment Card Setup**.
- 2 On the **Layouts** tab, select a layout, and click the **Edit** button.
- 3 On the **Treatment Card Layout** dialog box, select the field you want to be visible in Dolphin Mobile.
- 4 Click the **Edit** button.
- 5 On the **Treatment Card Field** dialog box, click the **Field** tab, if it is not already open.
- 6 Check the box next to **Show this field in Dolphin Mobile**.

The screenshot shows the 'Treatment Card Field' dialog box with the following settings:

- Code: TX Notes
- Description: Treatment Notes
- Width: 284
- Field Type: Text
- Continue previous entry until changed
- Entry required on Visit and Emergency entries
- This is the "Remarks" field
- Underline spelling errors while editing text in this field
- Copy appointment type descriptions to this field when currently blank
- Show this field in Dolphin Mobile

- 7 Repeat steps 3 through 6 for each field you want to be visible in Dolphin Mobile.