

# **Dolphin MyOrthodontist Setup and User's Guide**

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# Welcome

Congratulations on your decision to purchase Dolphin MyOrthodontist. The MyOrthodontist mobile app gives patients and billing parties access to the following:

- Patient information, including images
- Demographics
- Appointments
- Statement balance (for billing parties only)
- Super Questionnaires
- Practice information, such as FAQs, news items, media files, such as videos and images
- Email, phone, and social media
- Aquarium media, for those practices using Dolphin Aquarium 3.1, or later
- Secure message chat with the practice, providing the practice is licensed for it and permissions are set up to use it
- Ability to send up to a maximum to 3 attachments per each secure chat message

This guide is organized as follows:

[Requirements](#)

[What's New in MyOrthodontist?](#)

[Install the Dolphin Ocean Server](#)

[Set Up AnywhereDolphin and MyOrthodontist](#)

[Customize MyOrthodontist](#)

[Implement MyOrthodontist](#)

[Use MyOrthodontist to Add Appointments to a Mobile Calendar App](#)

[Enable Electronic Payments](#)

[Set up Signature Capture](#)

[Set up Secure Messaging](#)

[Frequently Asked Questions](#)

## Requirements

Your practice must:

- be current on Dolphin Service Club.
- have an AnywhereDolphin account.
- have Dolphin Management version 10.5 or higher and/or Dolphin Imaging version 11.7 or higher installed.

**Note:** *New features, such as those in MyOrthodontist version 45, and 5.0, require newer versions of Dolphin Management. The screen shots in this guide are from Dolphin Management version 10.5.*

- for Dolphin Aquarium users, have version 3.1 or higher installed.
- have Dolphin Update Server (DUS) installed and registered.
- to use Secure Messaging have:
  - Dolphin Management version 10.5 and above.
  - Dolphin MyOrthodontist 5.0 and above.
  - Premium 2-Way SMS Subscription or Dolphin Secure Messaging Subscription.

**One computer must be a dedicated Dolphin Ocean Server that:**

- has the required versions of Dolphin software installed.
- has inbound and outbound Internet access.
- remains ON at all times, allowing access 24/7.

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## What's New in MyOrthodontist?

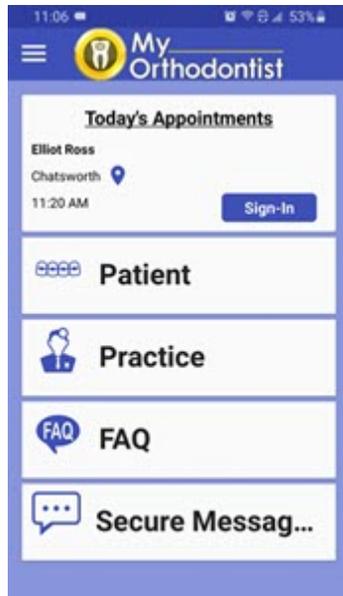
The following section describes what is new in this release of MyOrthodontist. The next sections describe what was new in previous releases (in reverse-chronological order).

### Version 5.2

Provided the practice has granted the new **Submit Patient Images** permission (available in Dolphin Management 10.5.7801 and above) patient users can now capture and submit their own initial and progress photos when logged into MyOrthodontist. Previously this ability was granted to billing party logins only.

### Version 5.1

- Patients can now sign themselves into your practice remotely! When a patient has an appointment scheduled for today, and they log into MyOrthodontist, they see the following on the home screen:



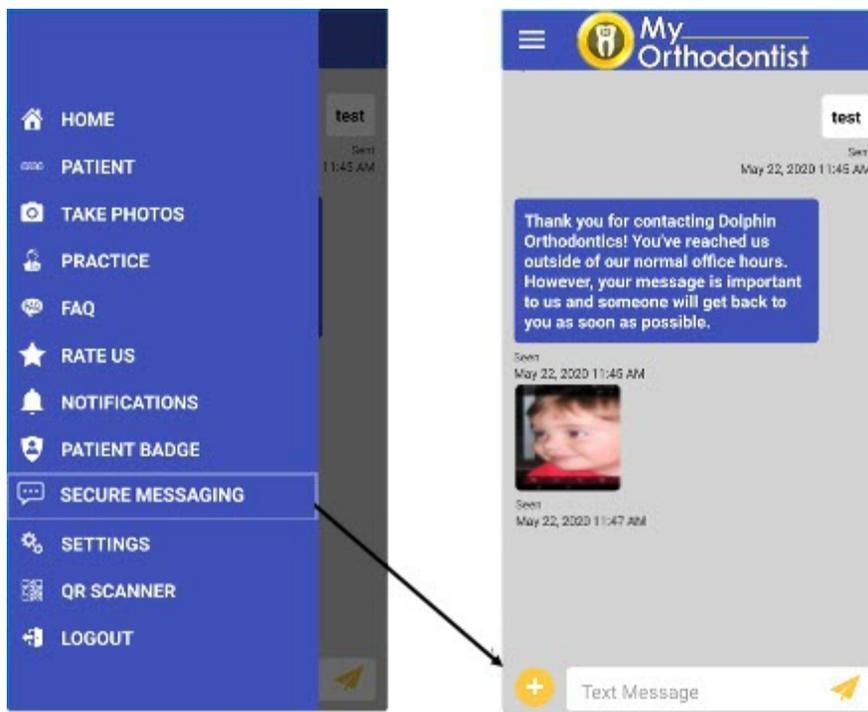
From here they can:

- Tap  to get directions to your office.
- Tap the  button to sign into your practice.

- We added a long press to enable patients to copy and paste text in chat messages.
- You can send active URL links to MyOrthodontist users via secure chat messages.

## Version 5.0

- Provided your practice is licensed for it, you can now use Secure Messaging to send and receive chat messages and attachments to and from patients and/or billing parties in your database.
  - a The patient accesses this feature through the hamburger menu.
  - b Tap **SECURE MESSAGING**.



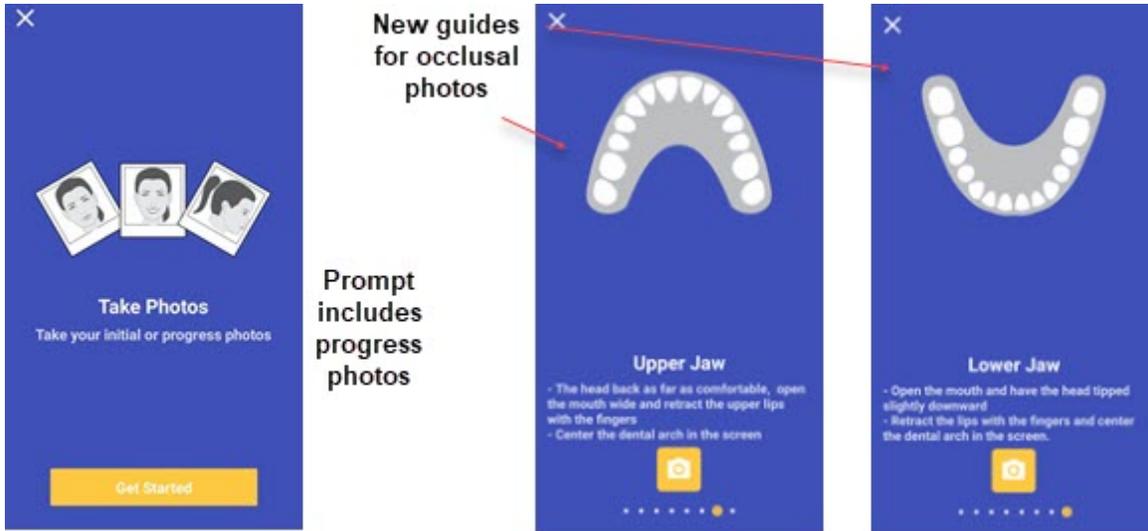
MyOrthodontist users tap  to open the [Attach a file](#) option, where they can browse on their device for documents or open the camera to take a picture, which they can then send to the practice

From Dolphin Management, you access these messages from the Messaging Center. From there you can save documents to the patient/billing party's Documents folder.

See "Set up Secure Messaging" on page 97. for more information on this feature.

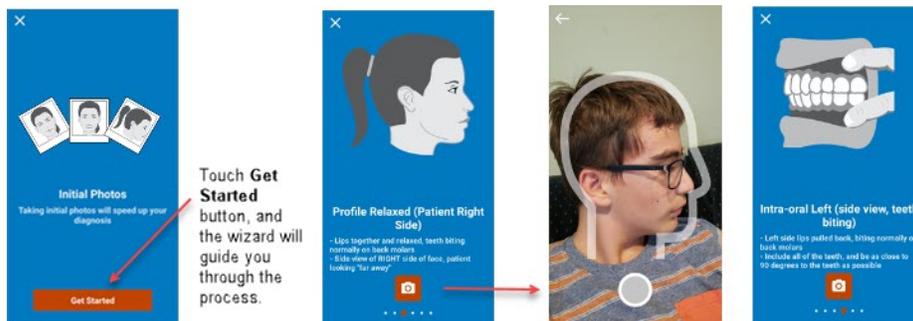
- If you have Dolphin Management 10.5, and you enable the features, MyOrthodontist users can:
  - take progress photos
  - take occlusal upper and occlusal lower photos and they will be added to that patient's record in Dolphin Imaging.

When a billing party logs into MyOrthodontist, they are now prompted to take initial or progress photos.



## Version 4.5

- When a billing party logs into MyOrthodontist, and they have no patient photos associated with their account, MyOrthodontist now prompts the billing party to take photos on the mobile device.



These photos are then sent back to the practice, and you can actually view them from Dolphin Imaging before the new patient has even arrived for the first appointment.

The option has to be activated in Dolphin Management; also the number and type of initial images for which you are prompted is set up in Dolphin Management.

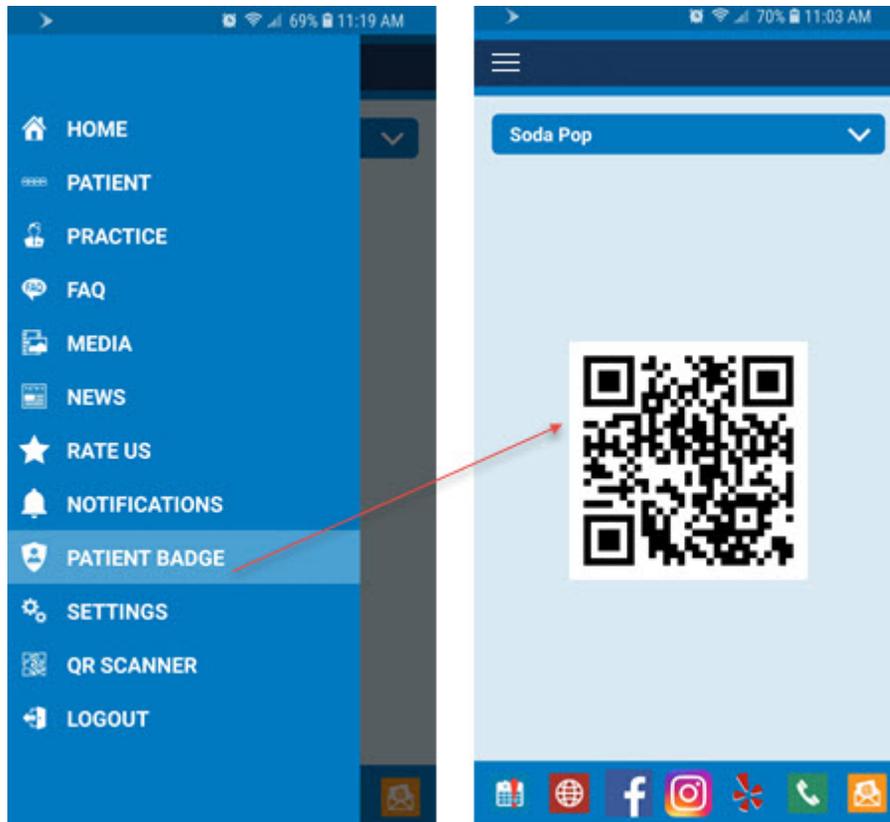
- Support for PayWithBreeze, provided it has been set up in Dolphin Management, and you have added the payment method or methods (credit card, bank, ACH) via the [Edit a Patient, Billing Parties](#) tab, [Financial](#) sub-tab, [Payment Methods](#) button for each billing party who wants to pay bills using MyOrthodontist.

## Version 4.0

- We added a Patient Badge option to the main menu. This option is available to both patients and billing parties. When touched, this option loads a QR code that represents a patient. When that

patient enters your office, he or she can scan this QR code using Dolphin Mobile or a physical scanner, and get checked in.

- a To access this menu touch the hamburger menu.
- b Touch **PATIENT BADGE**.



- Patients can update demographic information by clicking on the new pencil icon on the patient page. If you have enabled certain options in Dolphin Management and AnywhereDolphin, patients can also specify their appointment preferences in this new section.

You also have the option to hide or show the address, phone number, and email sections (via your practice's AnywhereDolphin account).

**Personal Information**

Preferred first name  
Cherry

Address  
213 St

City  
La

State (CA, NY, TX, etc)  
CA

Zip  
12311

Phone Number  
+9191;510 ;510

Mobile

Update

**Appointment Preferences**

MON TUE WED THU FRI

A.M. P.M.

Update

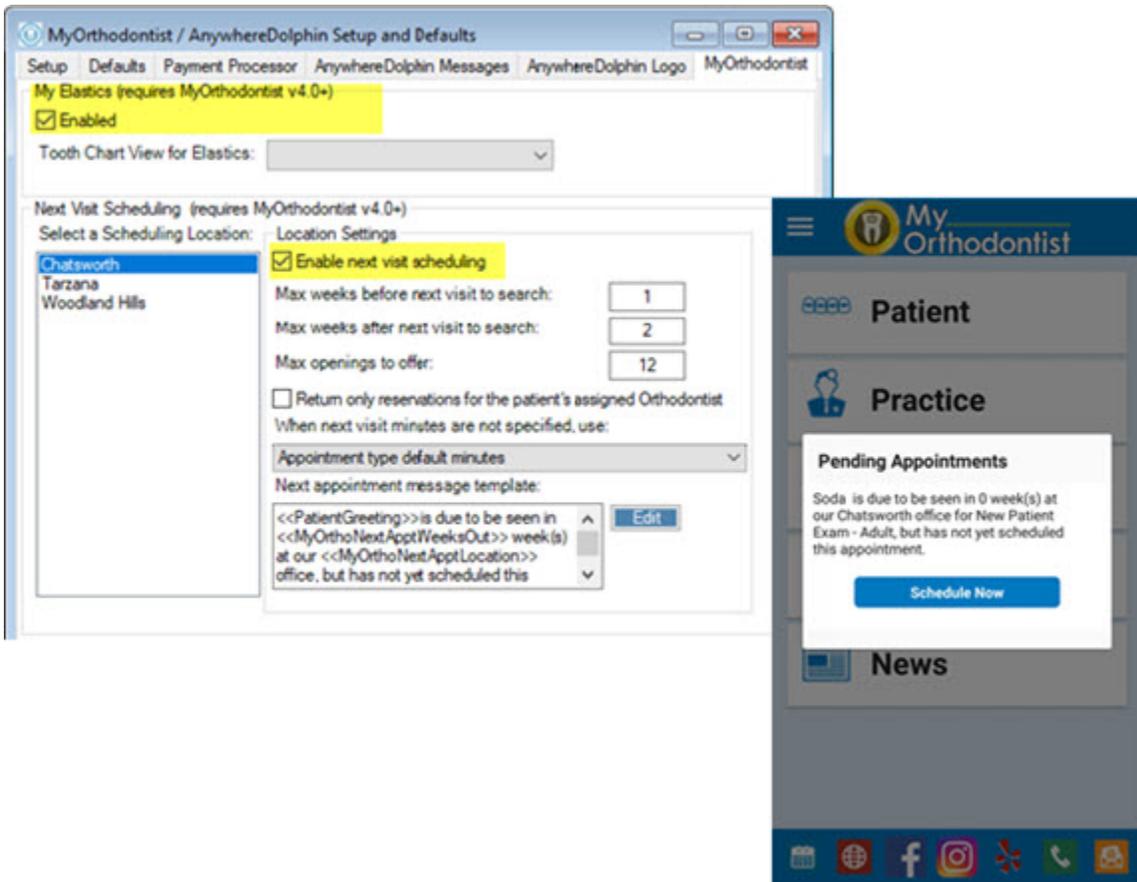
Billing parties can also update patient information from the **MY PROFILE** option available on the hamburger menu. This is particularly useful if the billing party is a parent with more than one child in treatment with your practice. When the billing party makes changes to his or her own address and phone number, MyOrthodontist provides the option to make these changes to all patients under that billing party.

- Appointment preferences and appointment schedule search

MyOrthodontist will prompt billing parties to schedule an appointment if the patient left the office with out scheduling an appointment, but a Next Visit entry was made in that patient's treatment card. Next visit scheduling must be enabled in Dolphin Management; additionally, MyOrthodontist will use the value in the treatment card WO (weeks out) column to search for an appointment.

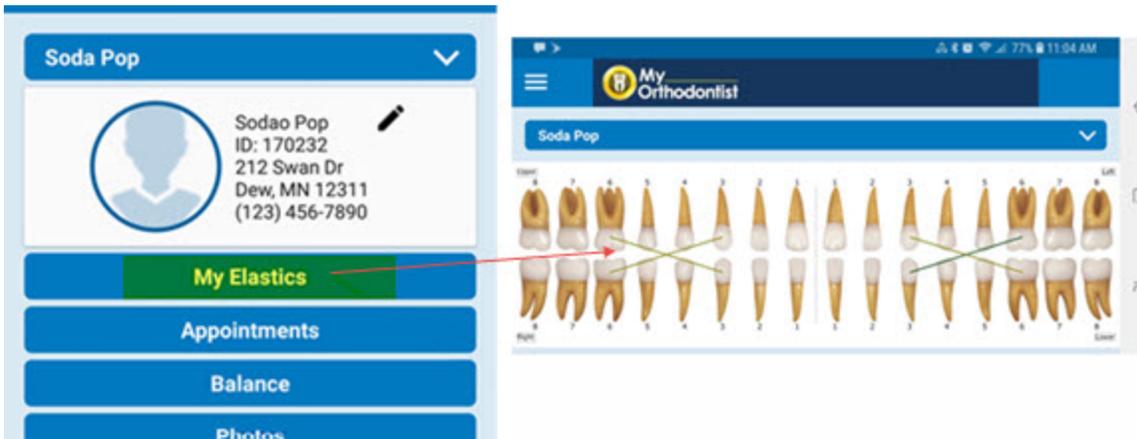
Your practice has the option to turn the scheduling feature on or off per location in Dolphin Management, and you can customize the search parameters.

When the scheduling feature is on, as shown in the [Dolphin Management MyOrthodontist/ AnywhereDolphin Setup and Defaults](#) screen below, the Pending Appointments message is displayed when the billing party logs into MyOrthodontist:



- Elastics

Patients undergoing elastics treatment can now view a tooth chart view of elastics application. This option is under the **PATIENT** menu.



- Document Signing

Patients and billing parties can now sign documents using the new document signing feature in MyOrthodontist.

Included with Dolphin Management V9 are several tokens used for signature capture. You can add these fields to any existing letter templates your practice currently uses that require signatures. You send this document to a patient via the letter batch using Email with Secure Attachments, via the Document Organizer, and send a push notification via MyOrthodontist.

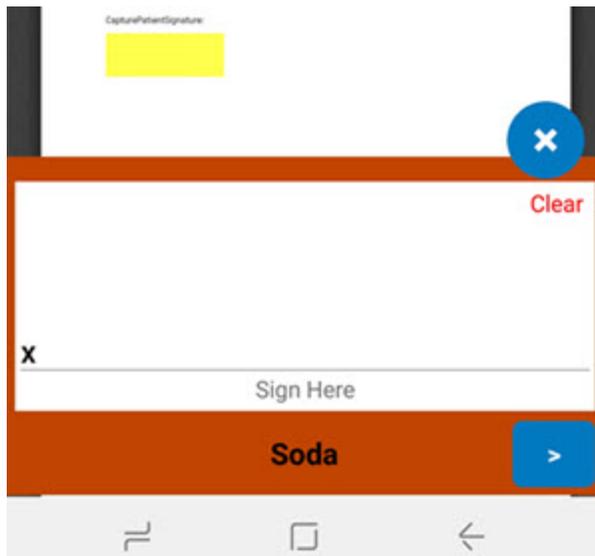
The presence of these new tokens triggers the signature/initials capture feature in MyOrthodontist. From the **PATIENT** menu, **Patient** page, the MyOrthodontist user touches **Documents** to open a list of documents shared by the practice. Upon opening a document requiring signature, the user sees



the signature icon:

He or she touches the icon to open the signature box.

If there is more than one area requiring signature or initials, the  button appears. MyOrthodontist users simply touch the arrow to move to the next signature or initial box in the document.

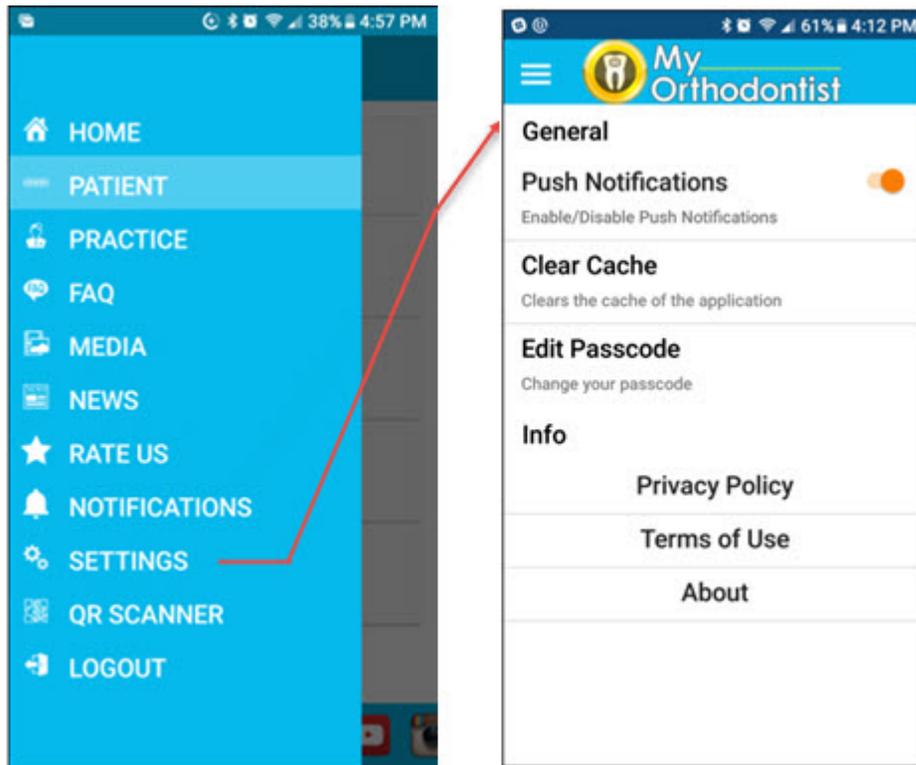


Users can view their signature in the MyOrthodontist preview window and clear and sign again if

necessary. To save the signed document, they touch the  button. MyOrthodontist saves a PDF copy of the document with the word **Signed** appended to the document name.

## Version 3.0

- We added a Settings menu to the mobile app.
  - a To access this menu, touch the .
  - b From the main menu, touch **SETTINGS**.



From here your users can add or edit an existing passcode, clear the cache, enable or disable push notifications, and get general information, such as which version of the app they are using.

- Since users can now edit or create a passcode any time they want from **SETTINGS**, users no longer have to log in with their user name and password each time if they do not create a passcode when they first install and open the app.
- We added support for push notifications.
  - a To view notifications from your practice, users just touch **NOTIFICATIONS** on the main menu.
- We have simplified the process for setting up MyOrthodontist accounts.
- Patients and billing parties can now rate your practice, and you can customize, based on the rating they give, whether the rating is sent directly to your practice or posted on social media.
- The footer on the MyOrthodontist app is now scrollable.
- We have made the following changes to how your practice customizes MyOrthodontist using AnywhereDolphin:
  - We have reorganized the menu on the AnywhereDolphin web page, and we have reorganized the menus under MyOrthodontist Setup.

- You can create a custom color scheme on the Theme page.
- Social Media links are now under their own sub menu under the MyOrthodontist Setup page.



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## Install the Dolphin Ocean Server

This section describes how to install and configure the Dolphin Ocean Server software on a dedicated computer running Dolphin Imaging, Dolphin Management, or both. The steps include installing the server software and running diagnostic tests.

**Note:** *If your practice has installed Dolphin Mobile or is sharing questionnaires via AnywhereDolphin, you have already completed this step. Skip to [Set Up AnywhereDolphin and MyOrthodontist](#) on page 17.*

### Installing the Dolphin Ocean Server

To install the Dolphin Ocean Server software, you must have administrator privileges for both Microsoft Windows and Dolphin Imaging, Dolphin Aquarium, or Dolphin Management.

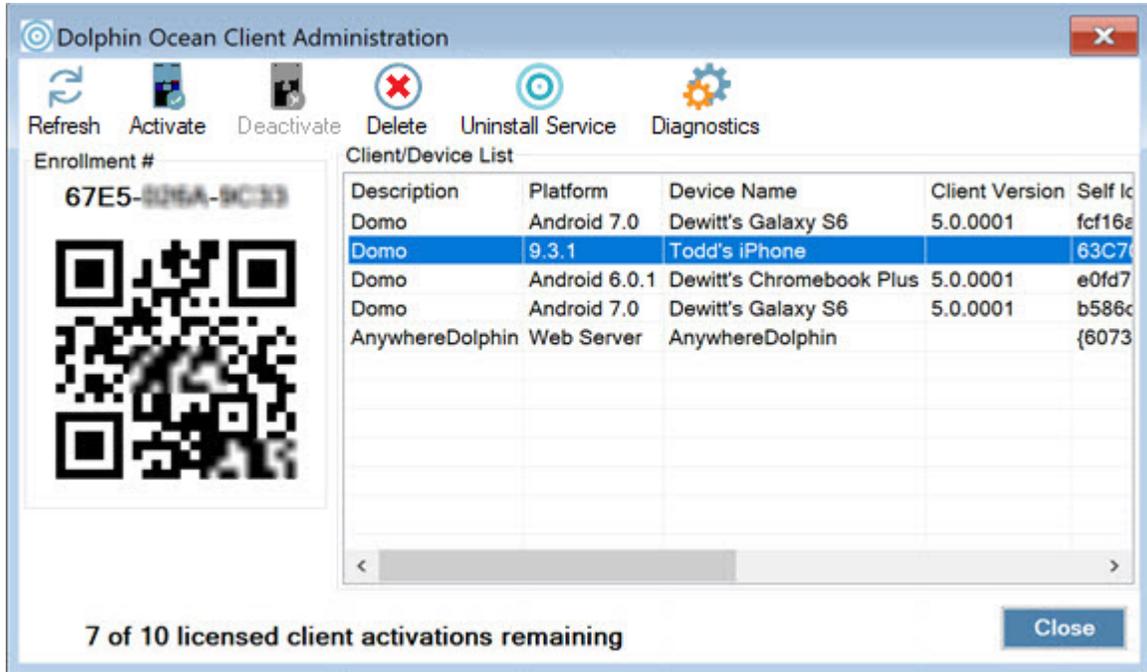
To run Dolphin Imaging, Dolphin Aquarium, or Dolphin Management with the necessary privileges:

- 1 Log in to the computer that you want use for the Dolphin Ocean Server using an account with Microsoft Windows administrator privileges.
- 2 Select **All Programs** from the Microsoft Windows **Start** menu.
- 3 Select the **Dolphin Imaging** or **Dolphin Management** folder from the **All Programs** sub-menu.
- 4 Right-click the **Dolphin Imaging** or **Dolphin Management** icon, and select **Run as administrator**.
- 5 Log in to Dolphin Imaging or Dolphin Management using a Dolphin account with administrator privileges.

To access the Dolphin Ocean Client administration features:

- 1 From the **Tools** menu, select **Dolphin Ocean Client Admin**.  
Or  
From the Aquarium main menu, select **Dolphin Mobile Tools-->Dolphin Ocean Client Admin...**

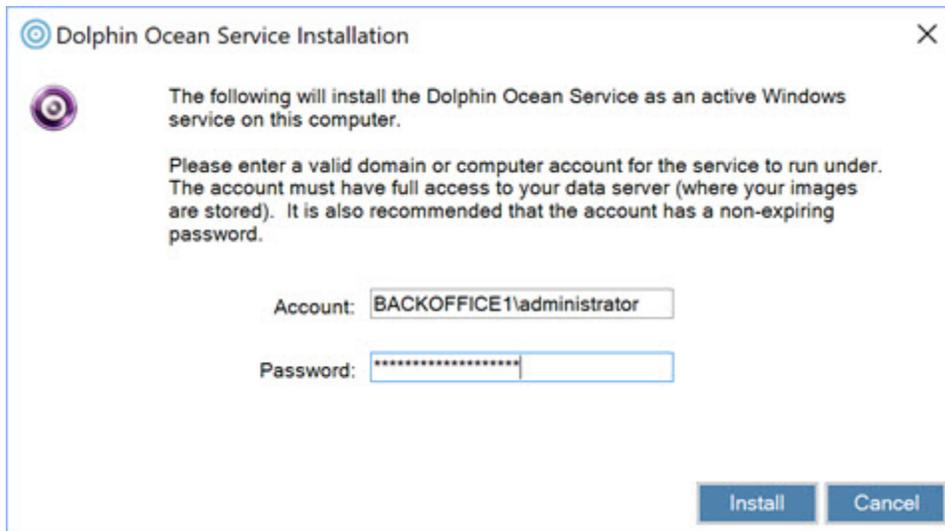
The **Dolphin Ocean Client Administration** dialog box appears.



To install the Dolphin Ocean Server software:

- 1 Click  Install Service.

The [Dolphin Ocean Service Installation](#) dialog box opens.



The account shown in the **Account** field is the currently-logged-in network account. In order to install the Dolphin Ocean Server, the account you use must have network rights that grant full access to the

server containing your Dolphin data. Dolphin also recommends that the account's password not be set to expire.

- 2 Optionally, enter the user ID for a different network account in the **Account** field.
- 3 Enter the password, and click **Install**.

After the server is installed, a message confirming that the installation was successful appears.

- 4 Click **OK**.

## Running Diagnostics

You run diagnostics to check server connectivity and verify that required WEB services are running on the Dolphin Ocean server. The tests that need to pass depend on the option you intend to use for remote (out-of-office) connections to your Dolphin Ocean Server:

- For the default and recommended Cloud Server option, only the Cloud Connect diagnostic tests must complete with a Pass. If the other tests do not pass, Dolphin Mobile and My Orthodontist will still work.
- For the Direct Connect (Internet) option, Direct Connect (Internet) tests must complete with a Pass. This indicates that the designated port number is open.

If the test fails, the Dolphin Ocean Service may not be running properly. If you need help troubleshooting the problem, please contact Dolphin Technical Support.

To run diagnostics:

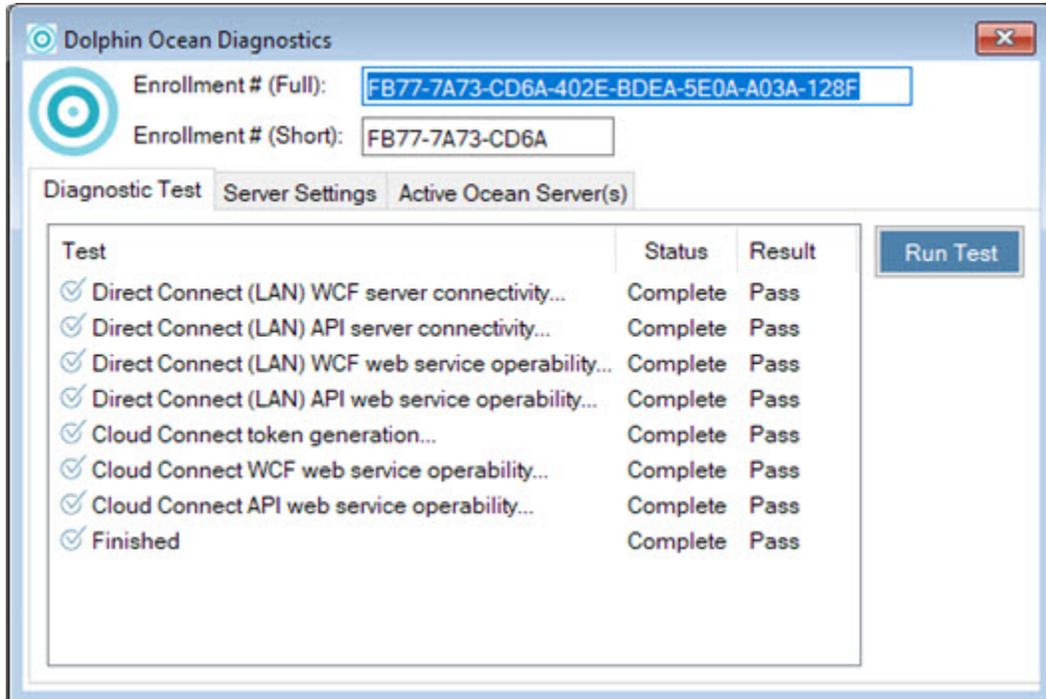
- 1 On the **Dolphin Ocean Client Administration** dialog box, click  **Diagnostics**.

The **Dolphin Ocean Diagnostics** dialog box opens. Typically, the diagnostic tests start automatically.

- 2 If the diagnostic tests don't start automatically, click **Run Test**.

As each test completes, the **Results** column reports whether the test passed or failed.

- 3 When you finish testing, click **Close**.



You do not need to change anything on the [Server Settings](#) or [Active Ocean Server\(s\)](#) tabs; these are for technical support reference only.

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# Set Up AnywhereDolphin and MyOrthodontist

This section describes how to set up the AnywhereDolphin cloud service for use with MyOrthodontist. It also describes how to set up the outbound email account used to invite someone to use MyOrthodontist, and other MyOrthodontist-specific settings, such as next appointment scheduling, My Elastics, and push notifications.

**Note:** *If your practice has installed Dolphin Mobile or is sharing questionnaires via AnywhereDolphin, you have already completed this step. Skip to “Implement MyOrthodontist” on page 55.*

## Setting Up an Outbound Email Account

When you invite someone to use MyOrthodontist or AnywhereDolphin, various email messages are exchanged with the recipient as part of the account set-up process. You need to set up email options for the email account that you want to use for this purpose in the SMS/Email Manager.

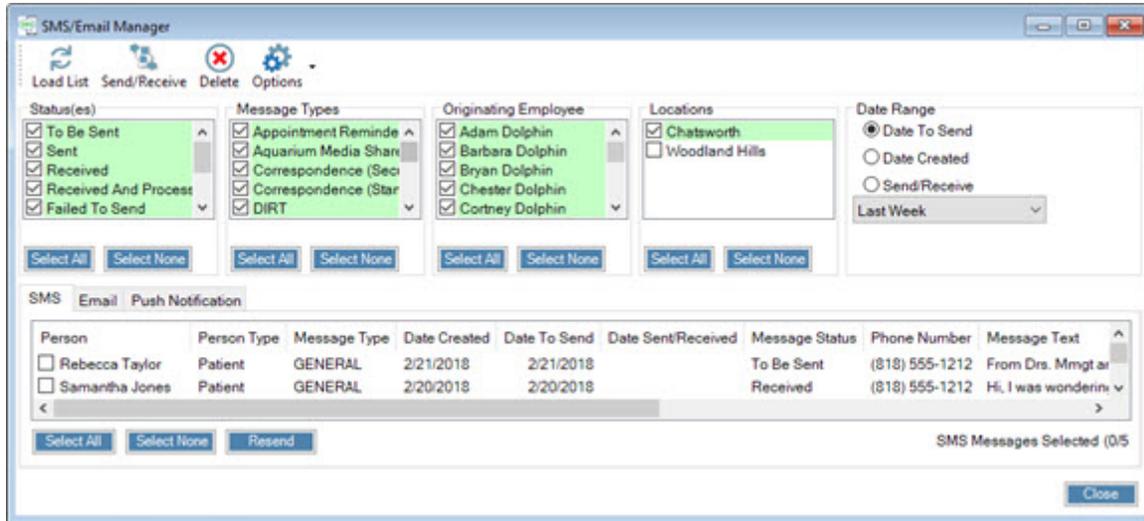
To open the SMS/Email Manager:

- 1 Log in to Dolphin Management or Dolphin Imaging with the account that you want to use to send and receive email messages.

**Note:** *This user account must have the Manage SMS/Email Correspondence Queue employee right enabled in order to open the SMS/Email Manager. For more information, refer to “Employee Rights” in the Dolphin Management online help or to “Setting Employee Rights” in the Security Setup chapter of the *Dolphin Imaging User’s Guide*.*

- 2 From the **Tools** menu, select **SMS/Email Manager**.

The **SMS/Email Manager** dialog box opens.



To set up email options for the currently logged-in Dolphin Management or Dolphin Imaging account:

- 1 Click  **Options** , then select **Email Options**.
- 2 Enter the information necessary to configure email for this account.

If you are setting up email options for someone other than yourself, you will need to work with that person so that they can enter their email account user name and password in the [Login Information](#) group box.

If you are unfamiliar with the information necessary to specify an email server, you may need to consult with an information technology (IT) professional to complete the information in the [Server Information](#) group box.

## Setting Up the AnywhereDolphin Cloud Service

This section describes how to set up the AnywhereDolphin cloud service for use with the MyOrthodontist app.

To set up AnywhereDolphin:

- 1 From the Dolphin Management **Edit** menu, select **Integrations**. Then, select **My Orthodontist / AnywhereDolphin Setup** from the sub-menu.

Or,

From the Dolphin Imaging **Edit** menu, select **AnywhereDolphin**. Then, select **My Orthodontist Setup** from the sub-menu.

The dialog box opens that contains tabs with options for setting up AnywhereDolphin. The tabs that appear depend on whether you're using Dolphin Management or Dolphin Imaging. The information that you can enter on these tabs is described in detail below.

<b>Setup</b>	On this tab, you enter information about your practice, including the practice's name, login credentials for AnywhereDolphin, and email account information.
<b>Templates</b>	On this tab, you specify the templates to use for various email messages.

<b>Permissions</b>	On this tab, you specify the default items to share with patients and billing parties.
<b>Payment Processor</b>	This tab appears in Dolphin Management; it appears in Dolphin Imaging for practices also licensed for Dolphin Management. On this tab, you can specify your preferred payment processor so that billing parties can post payments via AnywhereDolphin and MyOrthodontist.
<b>AnywhereDolphin Messages</b>	On this tab, you can customize the messages that your patients/billing parties see when they access AnywhereDolphin.
<b>AnywhereDolphin Logo</b>	On this tab, you can customize the logo that your patients/billing parties see when they access AnywhereDolphin.
<b>MyOrthodontist</b>	This tab is specific to MyOrthodontist. Here you specify: <ul style="list-style-type: none"> <li>• whether or not patients can view the tooth chart for elastics instructions.</li> <li>• whether patients or billing parties can search for and schedule the next visit to your office.</li> <li>• (for MyOrthodontist 4.5 and above) whether you want to MyOrthodontist to prompt patients/billing parties to capture initial patient photographs and which image types to capture.</li> <li>• which templates to use for MyOrthodontist-specific email communication.</li> </ul>
<b>Push Notifications</b>	This tab is specific to MyOrthodontist. Here you specify whether MyOrthodontist users should get push notifications when the practice shares a document, questionnaire, Aquarium video, etc. with the patient.
<b>Online New Patient Forms</b>	This tab appears for practices using Dolphin Management, who are also licensed for Online New Patient Forms. In conjunction AnywhereDolphin and MyOrthodontist, ONPF allows new patients to complete forms and even schedule their first appointment via your Web page.

2 Complete the information on the **Setup** tab (as described below), and click **OK**.

You must click **OK** on the **Setup** tab to save the information on it before completing any of the other tabs.

3 Optionally, enter or customize the information on the other tabs.

4 When you are finished completing the information on all of the tabs, click **OK**.

## Setup Tab

On this tab, you specify information about your practice, including the practice's name, login credentials for AnywhereDolphin, and email account information.

Setup

AnywhereDolphin Account Credentials

Username:

Password:

[Don't have an account? Click here to register...](#)

[Customize the MyOrthodontist app](#)

User Account to Send Verification Email

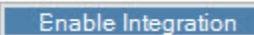
Practice Information

Name:

Email Address:

### Fields on the Setup tab

<b>Username</b>	The AnywhereDolphin user name for your practice.
<b>Password</b>	The AnywhereDolphin password your practices uses. This password is saved globally for all users in your practice.
<b>User Account to Send Verification Email</b>	This is the Dolphin user account to which patients and/or billing parties verify themselves to your practice. This is also the account that sends verification emails to patients/billing parties.
<b>Name:</b>	The name of your practice
<b>Email Address</b>	The practice email address

	<p>Click to allow Dolphin to automatically log you into AnywhereDolphin using the credentials above. From the AnywhereDolphin Integration page, you can approve the integration.</p> <p>This button changes to  after you have enabled the integration.</p> <p><b>Note:</b> <i>Versions prior to Dolphin Management 10.5 used a different method of setting up AnywhereDolphin integration, which still works. However, new features such as Secure Messaging, will not work unless you set it up using this new method. For information on Secure Messaging, see the Dolphin Management online help.</i></p>
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To complete the [Setup](#) tab:

- 1 Click the [Setup](#) tab if it isn't already selected.
- 2 In the [AnywhereDolphin Account Credentials](#) group box, enter the user name and password that your practice uses to access AnywhereDolphin.

Or

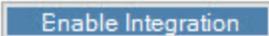
Click the link to register with AnywhereDolphin, and follow the directions from there.

We save the practice account password globally for all users; when you update the password on the this tab, Dolphin updates it automatically for all users.

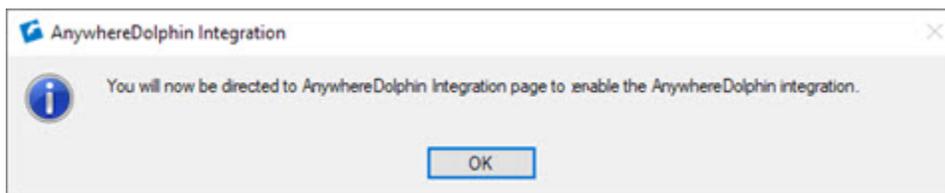
- 3 For [User Account to Send Verification Email](#), enter or click the  to look up the user account to which your patients and/or billing parties verify themselves to your practice.

This is also the account that sends verification emails to patients and billing parties.

- 4 For [Name](#), enter the name under which the mobile app can search for your practice.
- 5 For [Email Address](#), enter your practice email address.

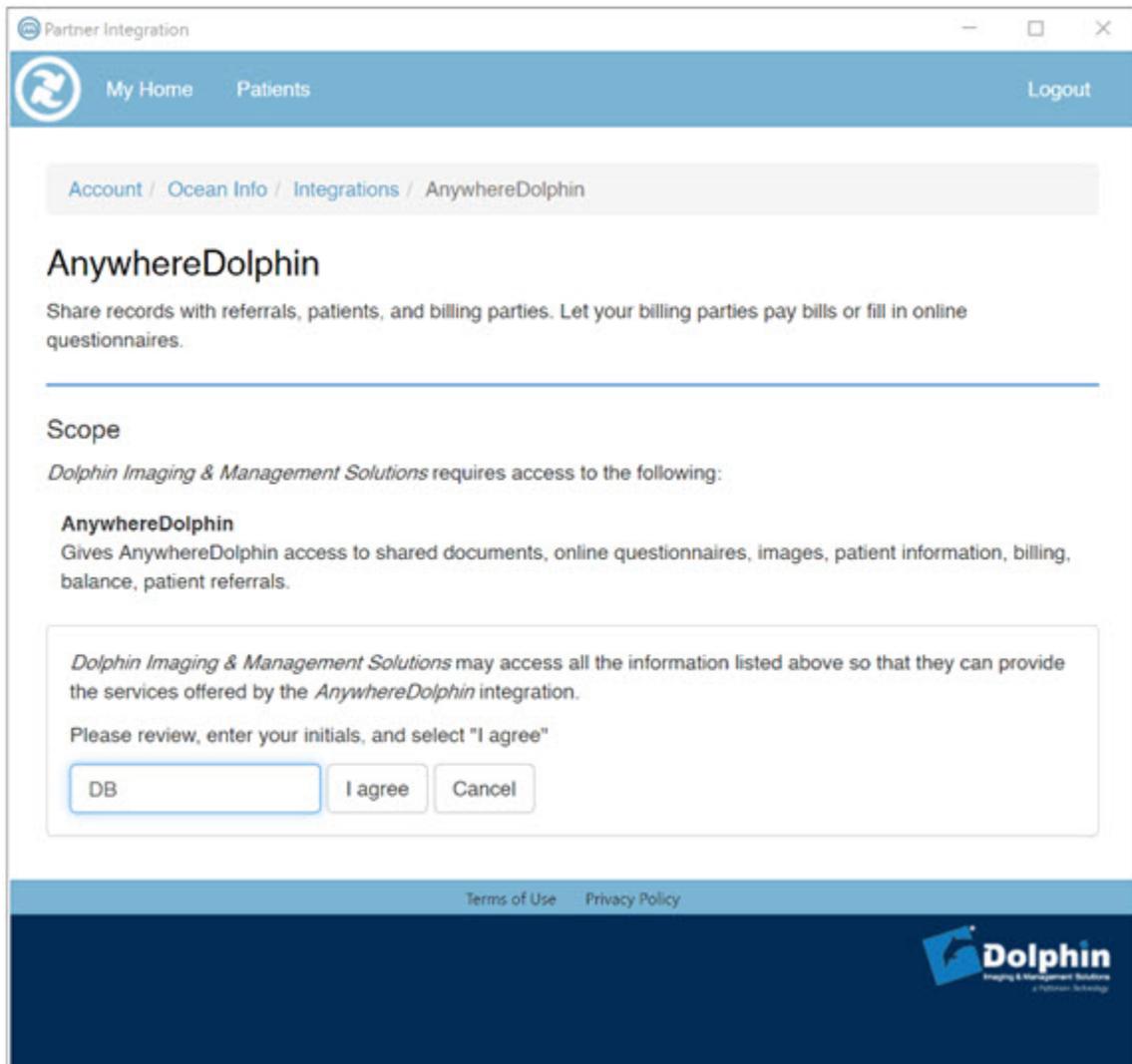
- 6 Click the  button.

The following message opens:



- 7 Click **OK**.

The AnywhereDolphin Partner Integration opens:



- 8 Key in your initials.
- 9 Click the **I agree** button.
- 10 Click the **X** to close the AnywhereDolphin Partner Integration window.

The  button now appears at the bottom of the [Setup](#) tab.

## Templates Tab

To complete the [Templates](#) tab:

- 1 Check **Automatically send AnywhereDolphin invitation when Billing Party is added**.
- 2 In the **Default AnywhereDolphin Email Templates** group box, for **Billing Party Invitation**, click the  button.

The **Email Templates** dialog box opens, and the **Billing Party--AnywhereDolphin Invitation** is selected.

- 3 Click **OK**.

You can edit, delete, add new templates, or change the default template that is used.

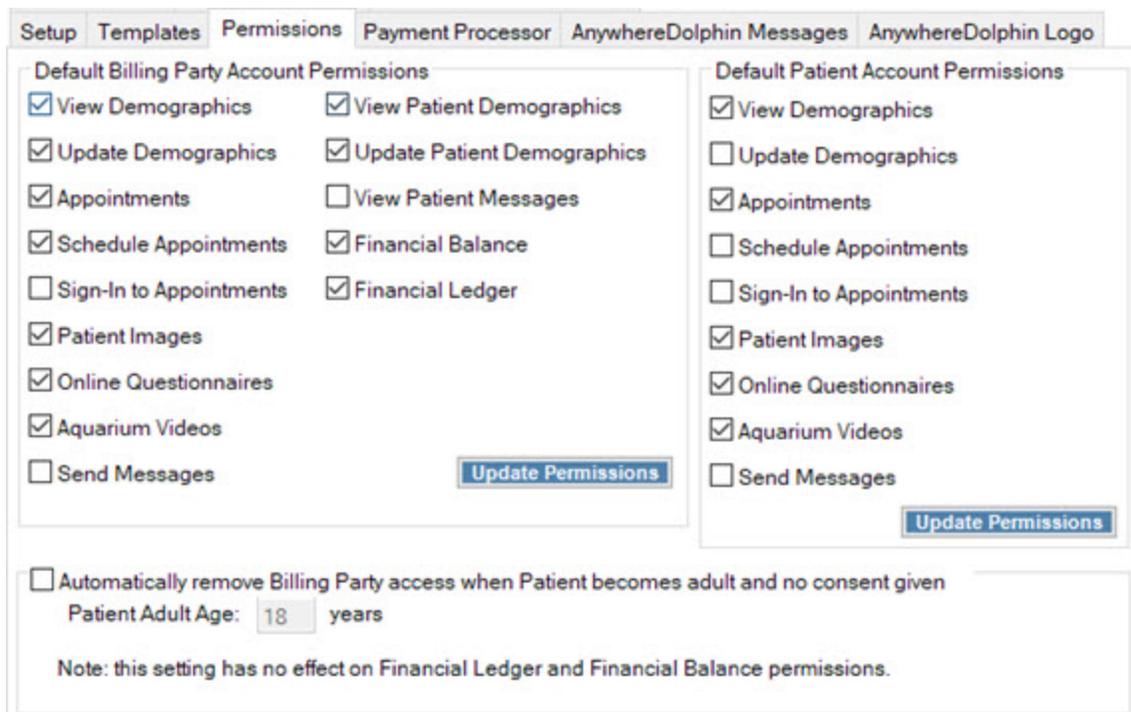
- 4 In the **Default AWD Email Templates** group box, for **Doctor Invitation**, and/or for **Send Questionnaire** (to send email with secure attachments to a patient) click the  button and repeat the previous 2 steps.

The **Added/Updated Username** field contains the template for the email sent out whenever AnywhereDolphin users add or change their AnywhereDolphin user name.

For more information on the templates associated with these options see, Adding or Editing Invitation Templates in the *Dolphin Management User's Guide*.

## Permissions Tab

On the **Permissions** tab, you specify the default items to share with patients and billing parties.



Setup Templates **Permissions** Payment Processor AnywhereDolphin Messages AnywhereDolphin Logo

**Default Billing Party Account Permissions**

- View Demographics
- Update Demographics
- Appointments
- Schedule Appointments
- Sign-In to Appointments
- Patient Images
- Online Questionnaires
- Aquarium Videos
- Send Messages

View Patient Demographics

- Update Patient Demographics
- View Patient Messages
- Financial Balance
- Financial Ledger

**Default Patient Account Permissions**

- View Demographics
- Update Demographics
- Appointments
- Schedule Appointments
- Sign-In to Appointments
- Patient Images
- Online Questionnaires
- Aquarium Videos
- Send Messages

Automatically remove Billing Party access when Patient becomes adult and no consent given  
Patient Adult Age:  years

Note: this setting has no effect on Financial Ledger and Financial Balance permissions.

To complete the [Permissions](#) tab:

- 1 Click the [Permissions](#) tab.
- 2 In the **Default Billing Party Account Permissions** group box, check the items that you want to make accessible by default to all billing parties with an AnywhereDolphin account.

<b>View Demographics</b>	Basic billing party demographic information.
<b>Update Demographics</b>	Update billing party basic demographic information.
<b>Appointments</b>	Access Patient appointment information. This information applies only to Dolphin Management.
<b>Schedule Appointments</b>	Schedule appointments through Dolphin mobile or online applications This option applies only to Dolphin Management.
<b>Sign-In to Appointments</b>	Sign in to patient appointments from a location near, but outside of the practice (such as a parking lot). This is used for our mobile app, MyOrthodontist.
<b>Online Questionnaire</b>	Access shared online questionnaires.
<b>View Patient Images</b>	View patient images from Dolphin Imaging, if you also have it installed. This option applies only to MyOrthodontist.
<b>Submit Patient Images</b>	Granted to billing parties by default, this permission allows billing parties and patients to submit initial and progress photos to the practice via MyOrthodontist. This option applies only to MyOrthodontist.
<b>Aquarium Videos</b>	Specific Aquarium videos if you also have Dolphin Aquarium installed. This option applies only to MyOrthodontist.
<b>Send Messages</b>	Allow billing parties to send secure SMS messages to the practice from MyOrthodontist (v 5.x). This requires your practice have a MyOrthodontist license and either the 2-Way SMS Processor or the Dolphin Secure Messaging license.
<b>View Patient Demographics</b>	View patient demographic information.
<b>Update Patient Demographics</b>	Update patient demographic information.
<b>View Patient Messages</b>	Allow billing parties to view secure SMS messages between the patient and the practice. This requires your practice have a MyOrthodontist license and either the 2-Way SMS Processor or the Dolphin Secure Messaging license.
<b>Financial Balance</b>	Access account balance information for billing party/patient combination. This information applies only to Dolphin Management.
<b>Financial Ledger</b>	Access ledger for billing party/patient combination. This information applies only to Dolphin Management.

- 3 Click **Update All Permissions** to make the selected permissions above the same access for all billing party users.

You can change individual settings for each billing party on the [AnywhereDolphin User Settings](#) dialog box or the [MyOrthodontist/AnywhereDolphin User Settings](#) dialog box (if you have a MyOrthodontist license).

- 4 In the **Default Patient Account Permissions** group box, check any or all of the following items you want all patients to access by default:

<b>View Demographic</b>	Access basic patient demographic information.
<b>Update Demographics</b>	Update basic patient demographic information.
<b>Appointments</b>	Access patient appointment information.
<b>Schedule Appointments</b>	Schedule appointments through Dolphin mobile or online apps.
<b>Sign-In to Appointments</b>	Sign in to patient appointments from a location near, but outside of the practice (such as a parking lot). This is used for our mobile app, MyOrthodontist.
<b>Patient Images</b>	Access patient images from Dolphin Imaging, if you also have it installed. This is used for our mobile app, My Orthodontist.
<b>Online Questionnaire</b>	Access shared online questionnaires.
<b>Aquarium Videos</b>	Access specific Aquarium videos if you also have Dolphin Aquarium installed. This is used for our mobile app, My Orthodontist.
<b>Send Messages</b>	Send secure SMS messages to the practice from MyOrthodontist (v 5.x). This requires your practice have a MyOrthodontist license and either the 2-Way SMS Processor or the Dolphin Secure Messaging license.

- 5 Click **Update All Permissions** to make the selected permissions above the same access for all patient users.

- 6 Check **Automatically remove Billing Party access when Patient becomes adult and no consent given**.

This activates the [Patient Adult Age](#) field.

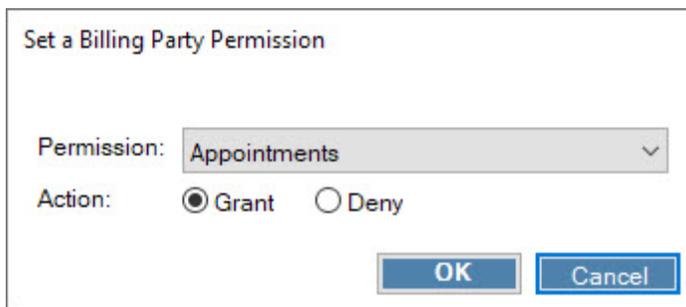
- 7 Enter the patient's age at which the billing party's access is automatically removed. The default age is 18.

**Note:** *The billing party can still access financial balance and financial ledger information, however.*

To change access to *one* permission for all billing party and/or all user accounts.

- 1 Click the **Permissions** tab.
- 2 In the **Default Billing Party Account Permissions** group box, click the **Update One Permission** button.

The following dialog box opens:

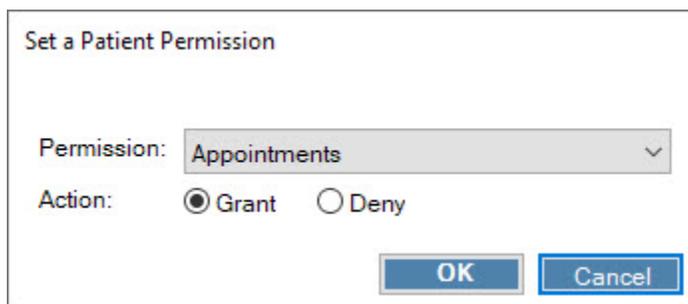


- 3 Click the **Permission** drop-down to select the one permission for which you want to change access.
- 4 Click **Grant** to grant this permission, or click **Deny** to deny this permission to all users.
- 5 Click **OK**.

A message box opens, requesting that you confirm you want to update the permission as you specified in the previous two steps.

- 6 Click **Yes** to update the permission as described in the message box.
- 7 In the **Default Patient Account Permissions** group box, click the **Update One Permission** button.

The following dialog box opens:



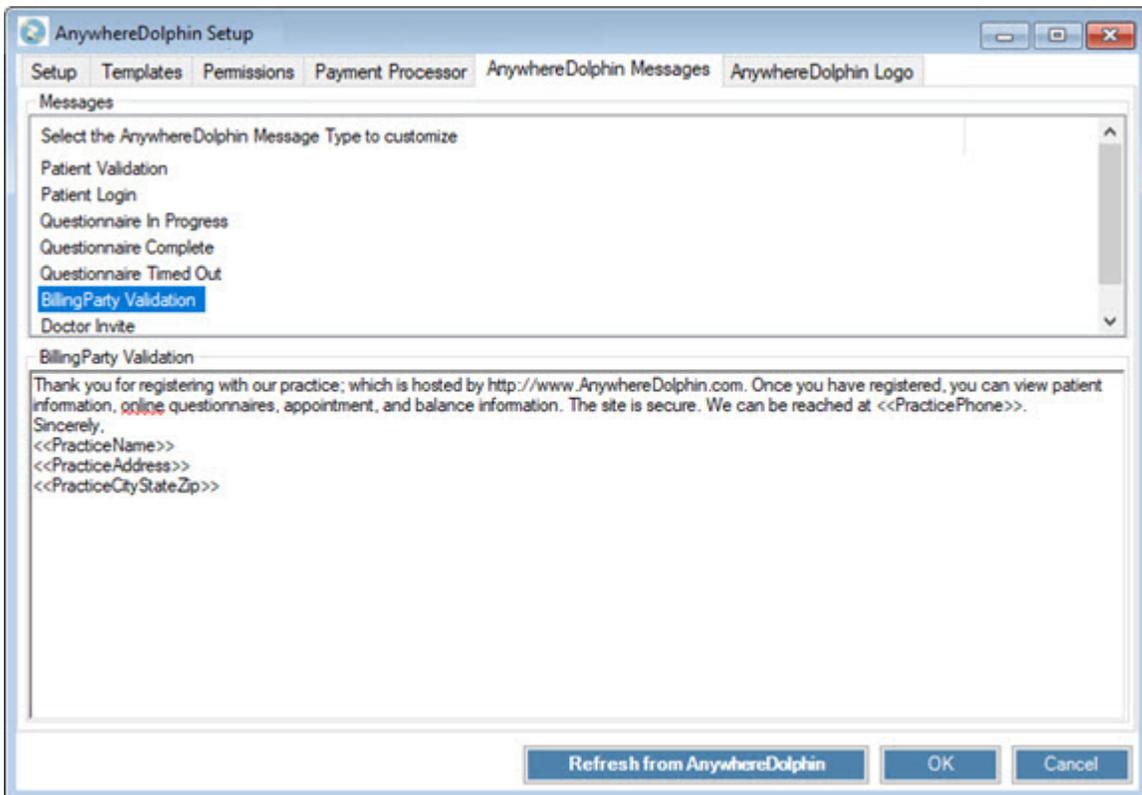
- 8 Repeat from Step <step number>3 through Step 6 to change the selected permission for all patient users.

## AnywhereDolphin Messages Tab

The [AnywhereDolphin Messages](#) tab is where you can customize the messages your patients/billing parties see when they access AnywhereDolphin.

To customize these messages:

- 1 Click the [AnywhereDolphin Messages](#) tab.



You can customize the following messages:

Billing Party Validation	This message is inserted into to the login information email that billing parties receive from AnywhereDolphin after their account has been validated.
Doctor Invite	Referring or co-treating doctors see this message when they register with AnywhereDolphin.
NewOnlinePatientQuestionnaire Error	This message is displayed if a potential new patient has a problem scheduling an appointment via New Online Patient Forms.
NewOnlinePatientQuestionnaire Message	This message is displayed when a potential new patient has signed up with your practice via New Online Patient Forms.

NewOnlinePatientQuestionnaire Schedule Appt	This message is displayed when a potential new patient indicates the wish to scheduled an appointment via New Online Patient Forms.
NewOnlinePatientQuesionnaire Welcome	This message is displayed when a potential new patient indicates the desire to be added to your system via New Online Patient Forms.
Patient Login	This message is inserted into the login information email that patients receive from AnywhereDolphin.com after their account has been validated.
Patient Validation	Patients see this message on the AnywhereDolphin.com validation screen.
Questionnaire Complete	Patients see this message after submitting a completed questionnaire.
Questionnaire In Progress	Patients see this message after saving an in-progress questionnaire.
Questionnaire Timed Out	Patients see this message when inactivity has caused the questionnaire to time out.

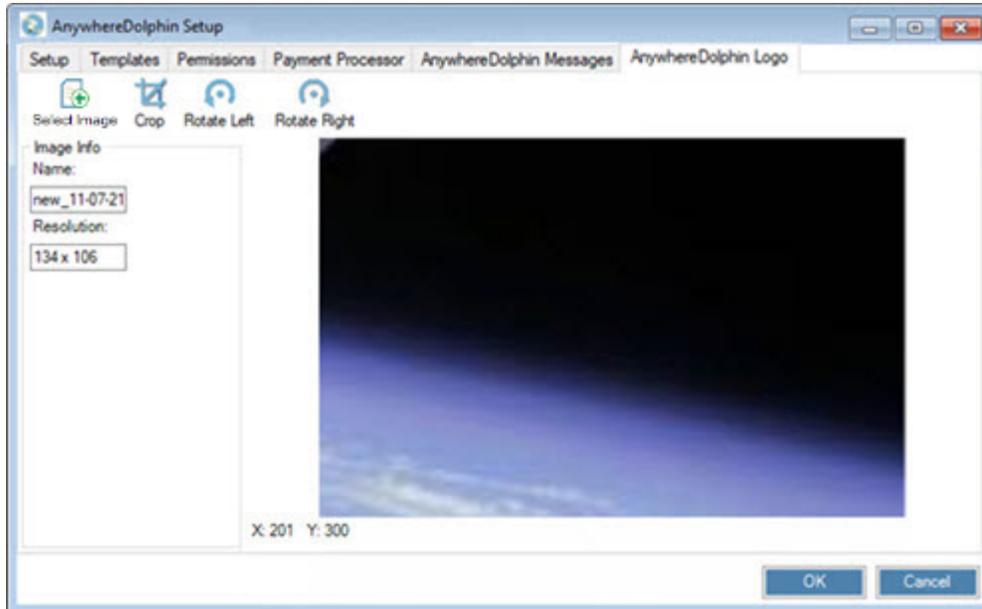
New Online Patient Forms is included with Dolphin Service Club, but you must still be licensed for it. Contact your Dolphin sales representative for assistance, and refer to the documentation for that product for setup instructions.

- 2 Select the message you want to edit.
- 3 Click on the message text to edit it.
- 4 Click the [Refresh from AnywhereDolphin](#) button to update the message contents on AnywhereDolphin.

## AnywhereDolphin Logo Tab

To change the logo that is displayed when your patients or billing parties access AnywhereDolphin:

- 1 Click the [AnywhereDolphin Logo](#) tab.



- 2 Click  **Select Image** to browse for an image on your computer.
- 3 Optionally, crop and/or rotate the image as described below.
- 4 Click **OK**.

You are prompted to enter your AnywhereDolphin password before the image can be uploaded.

- 5 If prompted to do so, enter your AnywhereDolphin password.

To crop the image:

- 1 Click and drag to draw a cropping rectangle around the part of the image you want to keep.
- 2 Click  **Crop** to crop out everything outside the cropping rectangle.

To rotate the image:

- 1 Click  **Rotate Left** , or  **Rotate Right** .

# Setting up MyOrthodontist

The following sections describe the MyOrthodontist-specific tabs, [MyOrthodontist](#) and [Push Notifications](#).

## MyOrthodontist Tab

This tab is where you set the templates for MyOrthodontist-specific verification and invitation emails, as well as My Elastics and Next Visit Scheduling (added in version 4.0) Initial Photo Capture, which requires version 4.5), enabling progress photos, which requires version 5.0, and remote appointment sign-in, which requires version 5.1.

**Note:** *Instruct your patients and billing parties to upgrade to the latest version of MyOrthodontist to take advantage of these new features.*

The screenshot displays the 'MyOrthodontist' software interface with three main sections:

- My Elastics (requires MyOrthodontist v4.0+)**: Includes a checked 'Enabled' checkbox and a 'Tooth Chart View for Elastics' pull-down menu.
- Next Visit Scheduling and Appointment Sign-In (requires MyOrthodontist v4.0+)**: Contains a 'Select a Scheduling Location' list with 'BC Location' selected. The 'Location Settings' group box includes:
  - Checked 'Enable next visit scheduling' checkbox.
  - Input fields for 'Max weeks before next visit to search' (1), 'Max weeks after next visit to search' (2), and 'Max openings to offer' (12).
  - Checked 'Return only reservations for the patient's assigned Provider' checkbox, with unselected options for 'Return only reservations for the patient's assigned Team' and 'Take off recall if one exists for same type being scheduled'.
  - 'Appointment type default minutes' pull-down menu.
  - 'Next appointment message template' text area with an 'Edit' button.
  - Checked 'Location validation required for appointment sign-in' checkbox.
  - Input fields for 'Office GPS Latitude' (0) and 'Office GPS Longitude' (0), with a 'Get' button.
  - 'Maximum distance from office' set to 1 Mile(s).
  - Input fields for 'Maximum minutes patient can sign-in before appointment' (30) and 'Maximum minutes patient can sign-in after appointment' (0).
  - 'Successful sign-in message override' text area.
- Patient Image Capture (requires MyOrthodontist v4.5+)**: Includes radio buttons for 'Image Capture' (Disabled, Allowed if patient has no images/timepoints, Allowed if patient has no timepoints with these image types, Allowed always - selected), and input fields for 'Initial Timepoint Name' (Initial - Online) and 'Progress Timepoint Name' (Progress - Online). Checked checkboxes for 'Frontal Relaxed', 'Frontal Smiling', and 'Profile Relaxed' are also present.

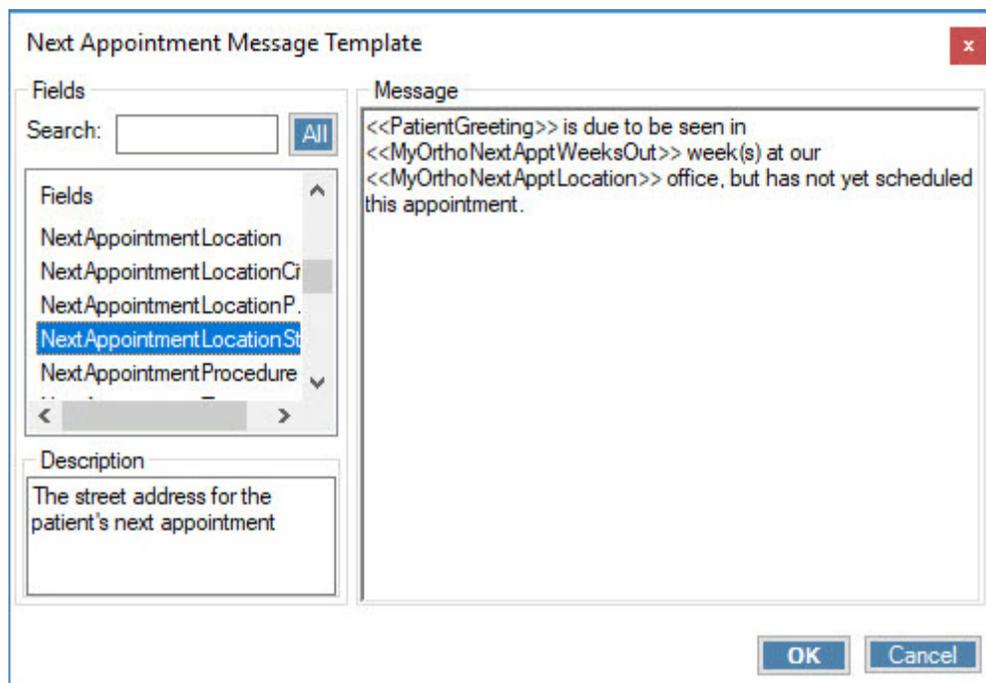
To provide your patients with a tooth chart view of their elastics:

- 1 In the **My Elastics** group box, click to check the **Enabled** check box.  
This activates the **Tooth Chart View for Elastics** pull-down menu.
- 2 Select **Elastics Only** from the **Tooth Chart View for Elastics** pull-down menu.

To allow patients and billing parties to schedule the next visit to your office:

- 1 In the **Select a Scheduling Location** list box, select a scheduling location.
- 2 In the **Location Settings** group box, complete the following:

- Click to check the **Enable next visit scheduling** check box.
  - Enter the maximum number of weeks before the next visit to your client can search.
  - Enter the maximum number of weeks after the next visit your client can search.
  - Enter the maximum number of openings in your schedule you want to offer each client.
  - Optional: To limit the appointment search to those times assigned or templated for the patient's assigned provider only, click to check **Return only reservations for the patient's assigned Orthodontist**.
  - Optional: To limit the appointment search to those times assigned or templated for the patient's assigned team only, click to check **Return only reservations for the patient's assigned Team**.
  - To automatically take a patient off recall if a recall appointment already exists for the type being scheduled, click to check **Take off recall if one exists for the same type being scheduled**.
- 3 On the **When next visit minutes are not specified, use:** pull-down, select one of the following:
- **Appointment type default minutes** - (Default) Appointment is scheduled using the number of minutes defined for the appointment type associated with the Next Visit.
  - **Open reservation minutes** - Appointment is scheduled using the number of minutes available in the open reservation slot.
- 4 Optional: If you want to edit the default message template MyOrthodontist users see when they need to schedule their next appointment:
- a Click the  button.



- b On the **Next Appointment Message Template**, **Message** text box, enter in the desired text, and double click on the fields you want to use in the **Fields** list box. There are several fields available for next appointments, as shown in the image above.
- c Click **OK**.

- 5 For each practice location, repeat the first four steps.

To enable remote appointment sign-in (which is available in MyOrthodontist 5.1):

- 1 Click to check the **Location validation required for appointment sign-in** check box.

This activates the options described in the following steps.

- 2 Click .

The **GPS Coordinate Lookup** opens. The office location appears in the **Results** list box.

- 3 Select the office location, and click **OK**.

This completes the values for **Office GPS Latitude** and **Office GPS Longitude**, respectively.

- 4 Enter a value for the **Maximum distance from office** from which remote sign-in is allowed.

The drop-down menu defaults to **Mile(s)**, but you can choose from **Yard(s)**, **Kilometer(s)**, or **Meter(s)**.

- 5 For **Maximum minutes patient can sign-in before appointment**, enter the maximum number of minutes prior to their appointment that patients can sign-in remotely.

- 6 For **Maximum minutes patient can sign in after appointment**, enter the maximum number of minutes *after* their appointment time that patients can see the sign-in option.

- 7 Optional: If you want a different message to be displayed (instead of the default successful sign-in message that is defined in **Edit a Location Options**), enter it in the **Successful sign-in message override (leave blank to use location default)** field.

- 8 For each practice location, repeat the previous steps.

To enable photo capture in MyOrthodontist (version 4.5 and above):

- 1 For **Image Capture**, specify one of the following:

- **Disabled** -- do not allow patients to capture their photographs using MyOrthodontist.

This disables the remaining options in the **Patient Image Capture** group box.

- **Allowed if patient has no images/timepoints** -- only allow patients to capture initial photographs using MyOrthodontist if they have no images or timepoints stored in Dolphin.

This enables all options except for the **Progress Timepoint Name** option.

- **Allowed if patient has no timepoints with these image types** -- only allow patients to capture initial photographs if they are missing timepoints with certain image types.

This enables all options except for the **Progress Timepoint Name** option

- **Allowed always** -- patients can capture photographs and associate them with timepoints in Dolphin.

This enables all options including the **Progress Timepoint Name** option.

**Patient Image Capture** (requires MyOrthodontist v4.5+)

Image Capture:  Disabled  Allowed if patient has no images/timepoints  
 Allowed if patient has no timepoints with these image types  
 Allowed always

Initial Timepoint Name:

Progress Timepoint Name:

Images to Capture:  Frontal Relaxed  Frontal Smiling  Profile Relaxed  
 Intra-Oral Left  Intra-Oral Center  Intra-Oral Right  
 Occlusal Upper  Occlusal Lower

- Optional: click to remove the check from any of the [images to Capture](#) check boxes you do not want billing parties/patients to capture via MyOrthodontist.

Providing [Disabled](#) is not selected, any users with no initial photos in their record who log into MyOrthodontist will be prompted to submit photos to the practice, and a wizard will guide them through this process.

To set the email templates that direct patients and billing parties to enter their MyOrthodontist verification codes:

- In the [MyOrthodontist Login Verification Email Templates](#) group box, click the [Edit](#) button for the [Patient](#) or [Billing Party](#).

The [Email Templates](#) dialog box opens.

- If you have location security enabled, click the radio button to save the default email template for [All Locations](#) or [Only This Location](#).
- Select the email template for the recipient type, and click [OK](#).

**MyOrthodontist Login Verification Email Templates**

Patient  [Edit](#)

Billing Party  [Edit](#)

**MyOrthodontist Invitation Email Templates**

Patient  [Edit](#)

Billing Party  [Edit](#)

To set the templates to use for MyOrthodontist invitation email messages:

- In the [MyOrthodontist Invitation Email Templates](#) group box, click the [Edit](#) button for the [Patient](#) or [Billing Party](#).

The [Email Templates](#) dialog box opens.

- 2 If you have location security enabled, click the radio button to save the default email template for **All Locations** or **Only This Location**.
- 3 Select the email template for the recipient type, and click **OK**.

To save all of your changes:

- 1 Click **OK**.

## Push Notifications Tab

Use this tab to specify whether MyOrthodontist users should receive push notifications when the practice shares a secure document, online questionnaire, or Aquarium video.

You can choose whether you want MyOrthodontist users to receive push notifications whenever you send an online questionnaire, a secure document, share Aquarium media, or any combination of the above. You create the customized message you want your clients to see on their mobile device. You should then set up the Send Push Notifications job in Dolphin Scheduled Job Manager, which logs into AnywhereDolphin as a user and sends these messages.

To enable push notifications:

- 1 In the **Enable Push Notifications** group box, click to check the box next to each notification type you want to send.
- 2 In the **Push Notification Messages** group box, click the pull-down menu to select the message type you want to customize. In the screen shot above, **Secure Documents** is selected.

- 3 Enter the desired text, and drag and drop the fields you want to use from the [Fields](#) list box into the message text box.
- 4 Repeat the previous two steps for each message type you want to customize.
- 5 Click  .

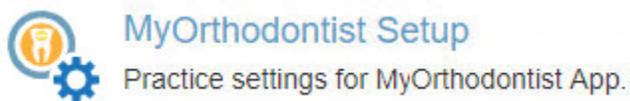


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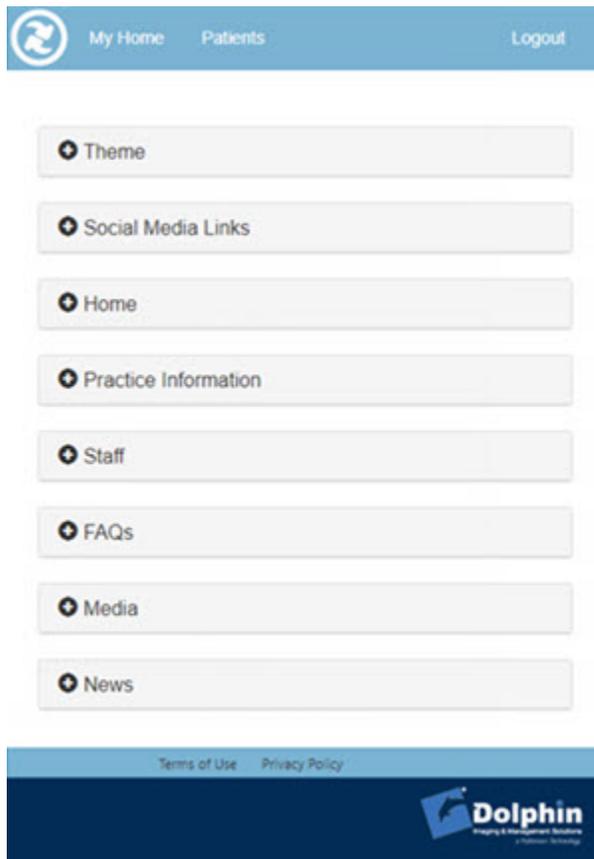
## Customize MyOrthodontist

This section describes how your practice can customize how MyOrthodontist looks on your patients and/or billing parties' mobile devices. You customize MyOrthodontist on a server running a Google Chrome or Safari application.

- 1 Log into AnywhereDolphin.com.
- 2 On the AnywhereDolphin.com home page, click the [MyOrthodontist Setup](#) link:



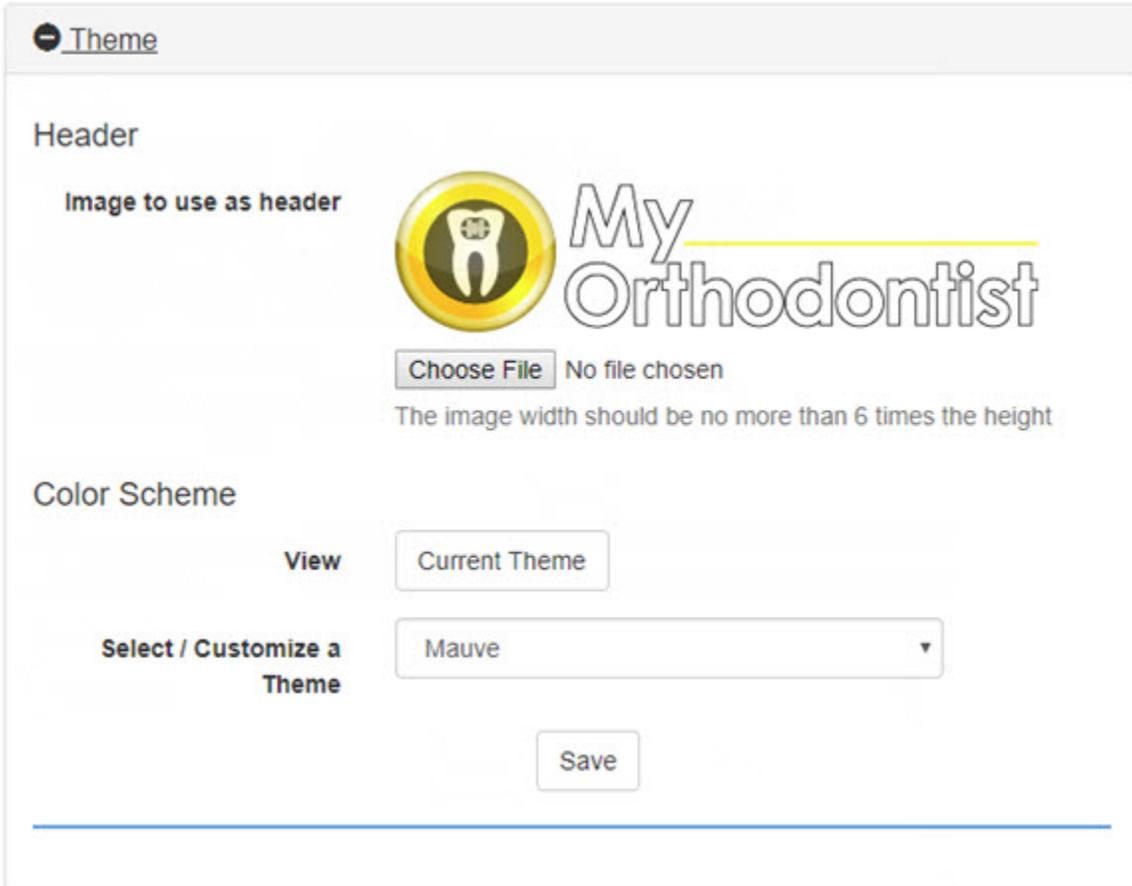
The following menu opens:



# Theme

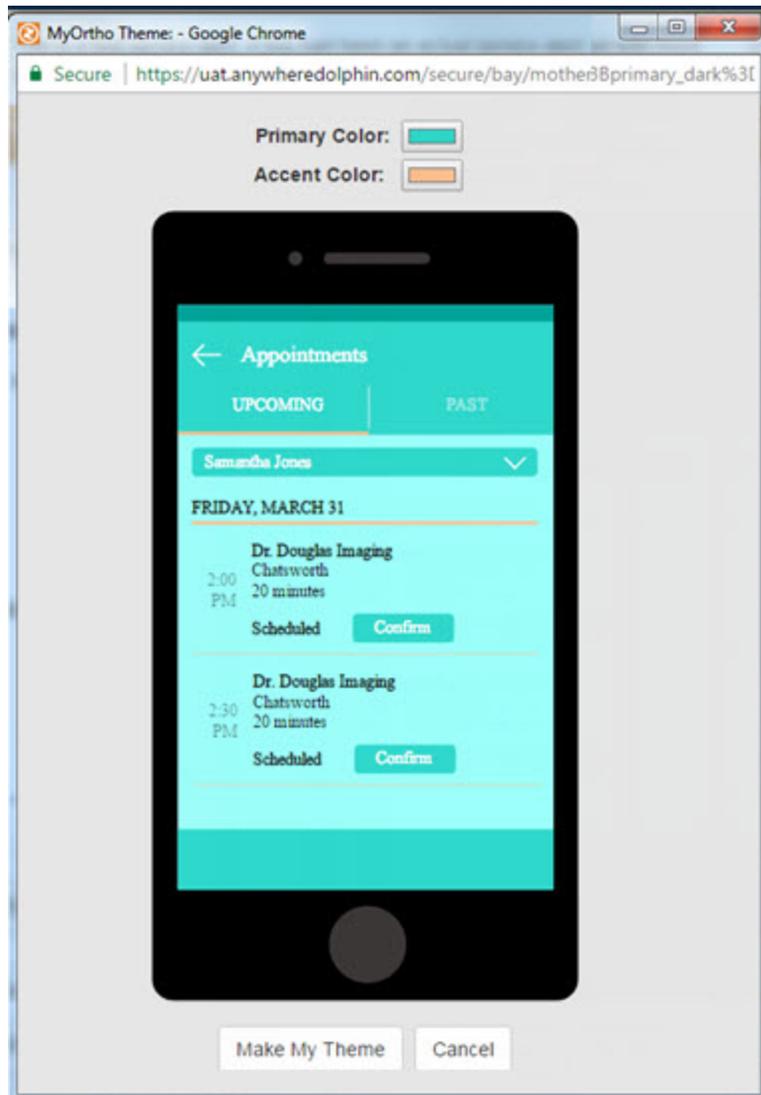
- 1 Click  to open the [Theme](#) page.

The [Theme](#) page is where you configure what the patients or billing parties see in the header, which includes your practice logo and the color scheme you select or customize.



- 2 In the [Header](#) section upload an image (for your practice logo), and ensure that the image is no wider than 6 times its height.
- 3 Optional: Under [Color Scheme](#), View, click [Current Theme](#) to open a window where you can view the current color scheme as it would appear on a mobile device.
- 4 Under [Color Scheme](#), click the [Select / Customize a Theme](#) pull-down menu to select your preferred color theme or starting point to customize a theme.

The [My Ortho Theme](#) page opens:



- 5 To keep this theme, click **Make My Theme**.
- 6 Skip to the next section, “Social Media Links” on page 42.
- 7 To customize this theme, click the **Primary Color** box to open the standard **Color** dialog box.
- 8 Make any changes desired, and then click **OK**.
- 9 Select the **Accent Color** box, and repeat the previous step.
- 10 Click the **Make My Theme** button to save your changes.

## Social Media Links

The [Social Media Links](#) section is where you enter your practice website address and any social media accounts (Twitter, Facebook, Yelp, etc.) you want to associate with your practice.

- 1 Click  to open the [Social Media Links](#) page.
- 2 Enter the required url for each social media link listed as desired.
- 3 Click the **Save** button to save your changes.
- 4 Optional: To add a link that isn't listed, enter it in the [Additional Links](#) section.
- 5 Click the **Save** button to save your changes.

## Home Page

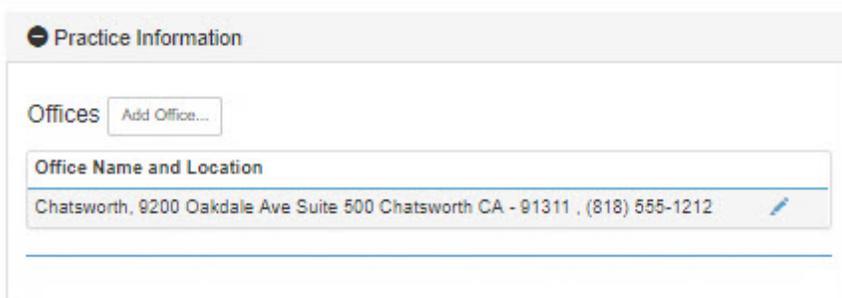
The [Home](#) page is where you upload a practice image. This information appears when the application first opens.

- 1 Click  to open the [Home](#) page.
- 2 Choose a file to upload for [Practice Image](#).
- 3 Click the **Save** button to save your changes.

## Practice Information

The [Practice Information](#) page is where you provide your physical office locations.

- 1 Click  to open the [Practice Information](#) page.



- 2 Click the **Add Office** button to add a physical office location.

The [Practice Information](#) page expands into several sections, which are described and shown separately in the following steps.

- 3 Use the **Location** drop-down menu to select from a list of locations configured in Dolphin Management.

**Practice Information**

**Offices** Add Office...

**Office Name and Location**  
 Chatsworth, 9200 Oakdale Ave Suite 500 Chatsworth CA - 91311 , (818) 555-1212

**Location** Chatsworth

**Office Name** Chatsworth

**Office Address** 9200 Oakdale Ave  
Suite 500

**Office Phone** (818) 555-1212

**SMS Phone Number**

**Office Fax**

**Office Email 1**

**Office Email 2**

**Office Hours**

**Locations**

Management Location Name	My Orthodontist Location Name (Optional)
<input checked="" type="checkbox"/> Chatsworth	Chatsworth
<input type="checkbox"/> Woodland Hills	Woodland Hills

Select All Select None

- 4 Complete the information as you want it to appear when MyOrthodontist users log in and click on **Practice** in the app.
- 5 To allow your patients and billing parties to rate your practice, complete the **Ratings** section, shown below:

**Ratings**

**Threshold:** 1 star ▼ ?

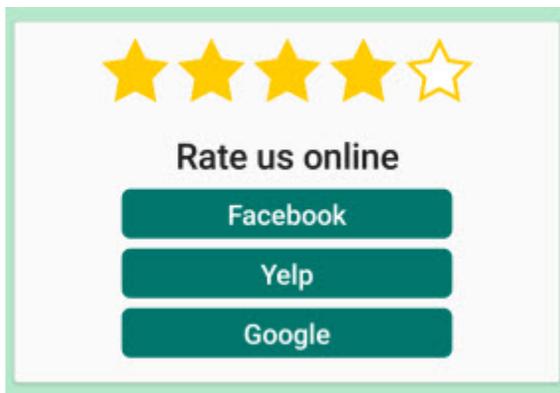
**Facebook Review Link**

**Google Maps Review Link**

**Yelp Review Link**

- Click the **Threshold** drop-down menu to select the rating threshold below which a user's rating and comment cannot go public, but instead gets sent directly to your practice.
- For each **Review Link**, enter the url for your practice's social media, review section.

When your patients rate your practice on MyOrthodontist, providing they are at or above the rating threshold, they will have the option to rate your practice on the social media links you provided:



**Note:** *Ratings settings are location-specific*

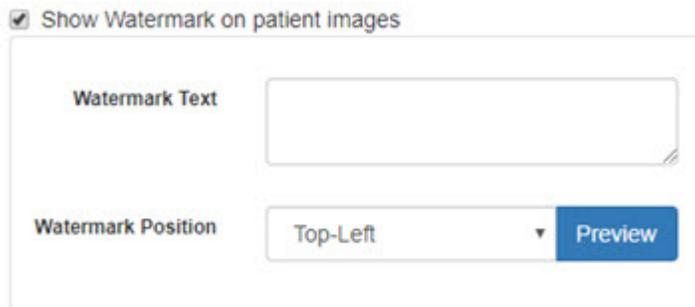
The remaining steps describe the last section of the [Practice Information](#) page:

<input type="checkbox"/> Show Future Appointments only <input type="checkbox"/> Exclude Insurance Balances from Responsible Party Totals <input type="checkbox"/> Don't show appointment length <input type="checkbox"/> Don't display Doctor's name in appointment reminders <input type="checkbox"/> Show Watermark on patient images <input type="checkbox"/> Don't show practice ratings <input type="checkbox"/> Show balance as zero for credit Current Due, Total Due and Account Balance amounts. <input type="checkbox"/> Don't show estimated treatment completion date.	<input checked="" type="checkbox"/> Allow user to update demographic information <input checked="" type="checkbox"/> Allow user to edit phone numbers <input type="checkbox"/> Use for SMS <input checked="" type="checkbox"/> Allow user to edit email addresses <input type="checkbox"/> Use for Appointment Reminders <input type="checkbox"/> Use for Statements (Billing party only) <input checked="" type="checkbox"/> Allow user to edit/update appointment preferences Schedule days to show: <input checked="" type="checkbox"/> M <input checked="" type="checkbox"/> Tu <input checked="" type="checkbox"/> W <input checked="" type="checkbox"/> Th <input checked="" type="checkbox"/> F <input checked="" type="checkbox"/> Sa <input checked="" type="checkbox"/> Su
---	--

These steps control what patients and billing parties can see and what they can update when they log into MyOrthodontist.

- 6 Optional: If you want your practice watermark to appear on patient images if patients share them on their social media accounts, click to check the option, **Show Watermark on patient images**.

The following options are displayed:



The screenshot shows a settings panel titled "Show Watermark on patient images" with a checked checkbox. Below the title are two main sections: "Watermark Text" and "Watermark Position". The "Watermark Text" section contains a text input field. The "Watermark Position" section contains a pull-down menu currently set to "Top-Left" and a blue "Preview" button.

- a Enter the text for your watermark.
  - b Click the **Watermark Position** pull-down menu to specify where on the patient image the watermark should appear.
- 7 Optional: Click to check one or more of the following check boxes:
  - **Show Future Appointments only** to prevent patients or billing parties from viewing previous appointments.
  - **Exclude Insurance Balances from Billing Party Totals** so it shows what the billing party owes only.
  - **Don't show appointment length** if you do not want patients to see the amount of time scheduled for their appointments.
  - **Don't display Doctor's name in appointment reminders** if you do not want the doctor's name to appear on the pop-up reminder messages that appear when patients or billing parties first log in to MyOrthodontist.
  - **Don't show practice ratings** if you do not want your practice ratings to show.
  - **Show balance as zero for credit Current Due, Total Due and Account Balance amounts**.
  - **Don't show estimated treatment completion date**.
- 8 Optional: Click to check one or more of the following check boxes to specify what patients and billing parties can view and update:
  - **Allow user to update demographic information** to let patients and billing parties modify their demographic information, which causes it to be updated in your Dolphin Management database.
  - **Allow user to edit phone numbers** to let patients and billing parties update the phone numbers on file with your practice.
    - a Click Use for SMS to let patients and billing parties to update or add a number to receive SMS messages.
  - **Allow user to edit email addresses** has two options - one just for billing parties and one for patients and billing parties:

- a **Check Use for Appointment Reminders** so patients and billing parties can modify which email address is used for appointment reminders.
- b **Check Use for Statements (Billing party only)**, so billing parties can modify which email address your practice should use to send statements.
- o **Allow user to edit/update appointment preferences** to allow patients and billing parties to specify preferences for appointment days, mornings or afternoons. This information will be updated on the [Patient \(more\)](#) tab in Dolphin Management.

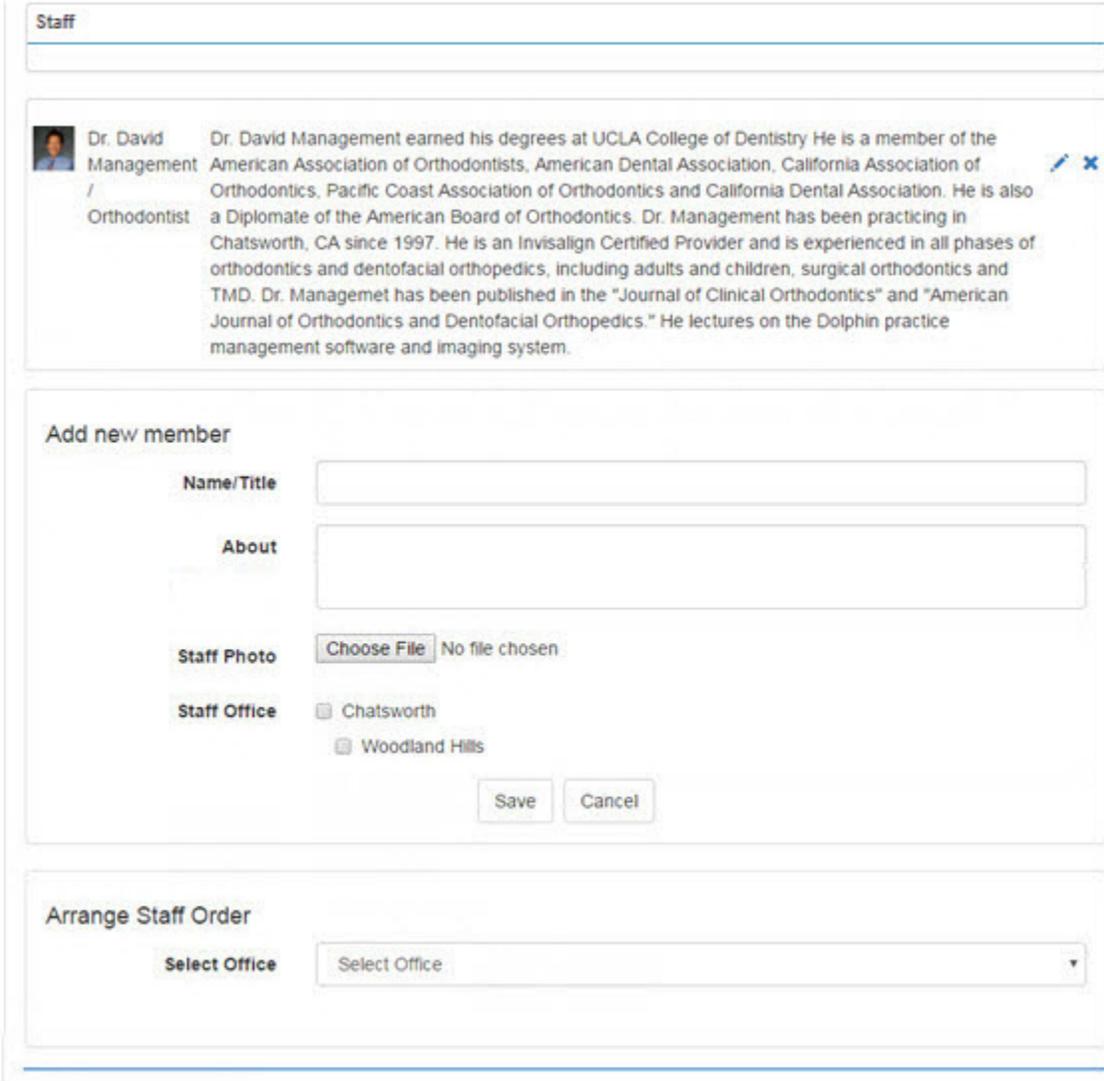
**Note:** *If your office is closed on certain days, click to uncheck those days; they will not show up as options for patients or billing parties to select.*

- 9 Click the **Save** button to save your changes on the [Practice Information](#) page.

# Staff

To add staff information to your practice information page:

- 1 Click  to open the [Staff](#) page.



The screenshot displays the Staff management interface. At the top, there is a 'Staff' header. Below it, a staff member profile is shown for Dr. David Management, an Orthodontist. The profile includes a small photo, a name, a title, and a detailed biography. To the right of the biography are edit and delete icons. Below the profile is the 'Add new member' section, which contains a 'Name/Title' text field, an 'About' text area, a 'Staff Photo' section with a 'Choose File' button and 'No file chosen' text, and a 'Staff Office' section with radio buttons for 'Chatsworth' and 'Woodland Hills'. At the bottom of this section are 'Save' and 'Cancel' buttons. Below the 'Add new member' section is the 'Arrange Staff Order' section, which features a 'Select Office' dropdown menu.

- 2 In the [Add new member](#) section, enter the staff name, any biographical or background information, upload a photo, and click to select the staff office (if your practice has more than one physical location) associated with this staff member.

When a patient is assigned to one office location signs in to the MyOrthodontist app, he or she will see staff members assigned to that location only.

- 3 To change the order in which staff members appear, under [Arrange Staff Order](#), use the [Select Office](#) pull-down menu to select the office.

Arrange Staff Order

Select Office

**Staff**

Dr. David Management / Orthodontist	▲ ▼
Dr. Debbie Imaging / Orthodontist	▲ ▼
Barbara Manning - Office Manager / TC	▲ ▼

- 4 Click the up and down arrows to change the order in which staff members appear.
- 5 Click the **Save** button to save your changes.

## FAQs

You can use the [FAQs](#) page to list and answer frequently-asked questions you and your staff encounter at your practice.

- 1 Click  to open the [FAQs](#) page.
- 2 Enter the text for the question and its answer.
- 3 Optional: Click **Choose File** to add an image

**FAQs**

Question	Answer
<p>▲ Athletics?</p> <p>▼</p>	<p>If you play sports, it is important that you consult us for special precautions. A protective mouth guard is advised for playing contact sports. In case of any accident involving he face, check your mouth and the appliances immediately. If teeth are loosened or the appliances damaged, phone at once for an appointment. In the meantime, treat your discomfort as you would treat any general soreness.</p>

**Add New FAQ**

**Add Image**  No file chosen

**Question**

**Answer**

- 4 Click the **Save** button.

Each question/answer combination you create is added to the bottom of the list. You can edit or remove questions, or change the order in which they appear, using the up and down arrow buttons

and the  and  buttons.

## Media

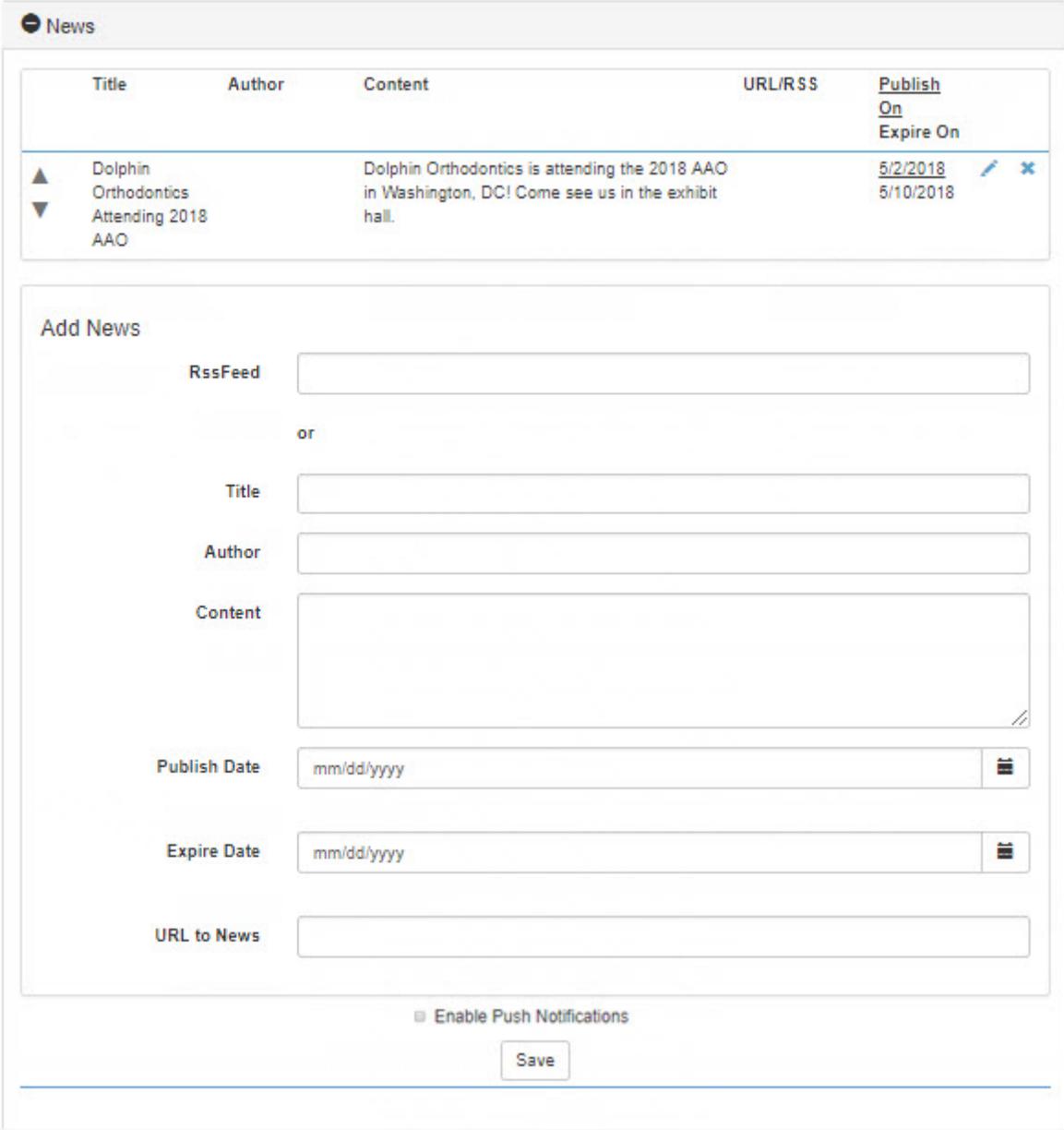
You use the [Media](#) page to store the URL of any publicly available image or video you want to share. (for example, images uploaded via Facebook, Instagram, etc.)

- 1 Click  to open the [Media](#) page.
- 2 Enter information for **Title**, **Description**, and **URL to Pictures/Images** for each image you want to share.
- 3 Click **Enable Push Notifications** if you want users to be notified when you make media changes on your page.
- 4 Click the **Save** button to save the [Media](#) page.

# News

Use the News page to define what patients and/or billing parties see when they click on the MyOrthodontist, [News](#) menu option.

- 1 Click  to open the [News](#) page:



	Title	Author	Content	URL/RSS	Publish On	Expire On	
▲	Dolphin Orthodontics		Dolphin Orthodontics is attending the 2018 AAO in Washington, DC! Come see us in the exhibit hall.		5/2/2018	5/10/2018	 
▼	Attending 2018 AAO						

### Add News

RssFeed

or

Title

Author

Content

Publish Date  

Expire Date  

URL to News

Enable Push Notifications

- 2 For each news item, you can do one of the following:
  - Create an RSS feed from a blog, and copy the feed to the [RSSFeed](#) field.
  - Enter the title, author, content, and link to a WEB page, as shown in the graphic above. If you want this item to expire, enter the desired date in the [Expire Date](#) field.

- 3 Click to check [Enable Push Notifications](#) if you want users to be notified of news updates on your page.
- 4 When you have finished entering data, click the [Save](#) button.

Each news item you create is added to the bottom of the list. You can edit or remove news items, or change the order in which they appear.

## Push Notifications

Use the [Push Notifications](#) page to:

- Specify a general message to send using push notifications.
- Manage notifications and view a list of the notifications, their type, location from which they were sent, status, and contents.
- Enter the default messages you want to pop-up on MyOrthodontist users' mobile devices when you update news and media.

To access [Push Notifications](#) page:

- 1 Log into AnywhereDolphin.com.
- 2 On the AnywhereDolphin.com home page, click the [Push Notifications](#) link



The [Push Notifications](#) page opens on the [Send General Message](#) tab.

Send General Message    Manage    Defaults

**Message:**

Characters: (150 max.)  
[Recently sent messages:](#)

**Locations:**  Chatsworth  
 Woodland Hills  
[All / None](#)

**Only Patients with Appointments Scheduled For:**

**Date to Send:**

**Time to Send:**

---

To specify a general message to send MyOrthodontist users based on location, appointments, date and time to send, etc.:

- 1 Enter the message text (up to 150 characters).
- 2 Specify the location or locations from where you want to send the message.
- 3 To filter message recipients based on scheduled appointments, click to check [Only Patients with Appointments Scheduled For:](#), and select the date using the .
- 4 Specify the [Date to Send](#) and [Time to Send](#) respectively.
- 5 Click **Send** to schedule the message.

After you have sent messages, the [Recently sent messages](#) link will appear, and you can click on it to review the message text and its sending status.

To search, view, and manage push notifications:

- 1 Click the [Manage](#) tab.
- 2 Use the [Locations](#), [Notification Types](#), and [Notification Status](#) filters to search for push notifications that match the criteria you select.
- 3 Click **Search**.

Send General Message   Manage   Defaults

**Locations**

Chatsworth  
 Woodland Hills  
[All / None](#)

**Notification Types**

General  
 News  
 Media  
 Appointments  
[All / None](#)

**Notification Status**

Sent  
 Pending  
 Deleted  
[All / None](#)

Date	Type	Location	Status	Text
9/28/2017	GENERAL	Chats	Sent	May the 4th be with you! <span style="float: right;"><a href="#">✎</a> <a href="#">✕</a></span>
9/27/2017	GENERAL	Chats	Sent	May the 4th be with you! <span style="float: right;"><a href="#">✎</a> <a href="#">✕</a></span>
9/26/2017	GENERAL	Chats	Sent	Updated the news section. Check it out! <span style="float: right;"><a href="#">✎</a> <a href="#">✕</a></span>
9/25/2017	APPT	Chats	Sent	Test appt tomorrow2 <span style="float: right;"><a href="#">✎</a> <a href="#">✕</a></span>

1 2 3 4 5 6 7 8 9 10 ...

For each notification listed, you can edit it or delete it from the list.

- 4 Click  to remove an item.
- 5 Click  to edit an item.

- 6 Enter a new message and date to send the message.
- 7 Click **Save**.

To set up default messages regarding updates to your [News](#) and [Media](#) pages:

- 1 Click the [Defaults](#) tab.

- 2 Use the [Default Notification for News/Media](#) pull-down menus to specify whether to send or not send the default notification messages.
- 3 In the [Message](#) text box, enter the text you want to appear for [News](#) and [Media](#) notification messages respectively.
- 4 Click **Save**.

---

## Implement MyOrthodontist

This section describes how to implement MyOrthodontist, which includes notifying your clients and helping them set up and troubleshoot the mobile MyOrthodontist app.

**Note:** *If your clients have any problems accessing your server through the MyOrthodontist app, they should contact your office, not Dolphin Technical Support.*

- 1 Hang posters or placards around the office announcing that the MyOrthodontist mobile app is available.
- 2 Send an email to your patients and billing parties, announcing that MyOrthodontist is now available. If you have Dolphin Management, you can create a DIRT report and search on all New and Active patients to get all the necessary email addresses
- 3 Create MyOrthodontist accounts for patients and billing parties as described below.
- 4 Have your staff copy the information in the “Instructions for Patients and Billing Parties” section that starts on page 71 as needed to help your clients set up the mobile app and start using their accounts. Familiarize yourself with this processes described in these pages, so you can answer any questions your patients or billing parties may have.

## Creating MyOrthodontist Accounts

You use the [My Orthodontist / AnywhereDolphin User Settings](#) dialog box to set up My Orthodontist accounts.

To open the [My Orthodontist / AnywhereDolphin User Settings](#) dialog box:

- 1 From Dolphin Management, open the patient’s treatment card or patient information (via the [Edit a Patient](#) dialog box).

Or,

From Dolphin Imaging, select the patient on the [Patient Lookup](#) dialog box. Then, click [Details....](#)

- 2 Verify that the patient's birth date has been entered on the [Patient](#) tab of the [Edit a Patient](#) dialog box.

The patient’s birth date is required to create a My Orthodontist account.

- 3 If you intend to set up a My Orthodontist account for the patient, verify that the patients email address has been entered on the [Patient](#) tab of the [Edit a Patient](#) dialog box.

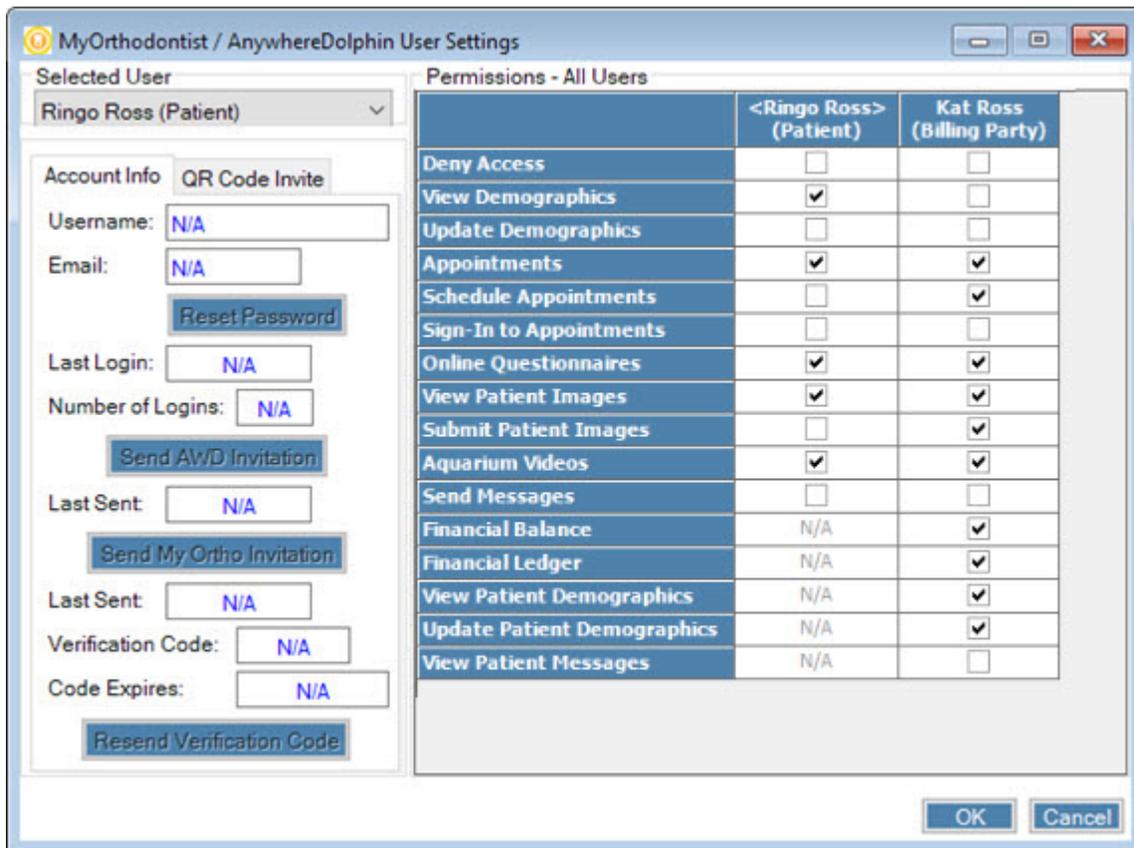
Or,

If you intend to set up a My Orthodontist account for the billing party, verify that the billing party's email address has been entered on the **Billing Parties** tab of the **Edit a Patient** dialog box.

These email addresses are required, because various email messages are exchanged with the patient or billing party as part of the account set-up process.

- 4 Click  MyOrthodontist

The **My Orthodontist / AnywhereDolphin User Settings** dialog box opens. The **Selected User** dropdown list contains the name of the currently selected patient or billing party.



	<Ringo Ross> (Patient)	Kat Ross (Billing Party)
Deny Access	<input type="checkbox"/>	<input type="checkbox"/>
View Demographics	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Update Demographics	<input type="checkbox"/>	<input type="checkbox"/>
Appointments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Schedule Appointments	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sign-In to Appointments	<input type="checkbox"/>	<input type="checkbox"/>
Online Questionnaires	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View Patient Images	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Submit Patient Images	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Aquarium Videos	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Send Messages	<input type="checkbox"/>	<input type="checkbox"/>
Financial Balance	N/A	<input checked="" type="checkbox"/>
Financial Ledger	N/A	<input checked="" type="checkbox"/>
View Patient Demographics	N/A	<input checked="" type="checkbox"/>
Update Patient Demographics	N/A	<input checked="" type="checkbox"/>
View Patient Messages	N/A	<input type="checkbox"/>

## Selecting the Information to Share

When you set up AnywhereDolphin, you specified information to share by default with billing parties and patients. However, you can override these default settings for a particular billing party and patient.

To specify permissions for the selected billing party and patient:

- 5 Check the boxes associated with items to you want to share.

When a billing party creates an AnywhereDolphin account, he or she can have access by default to everything you allow on the [Permissions](#) tab on the [AnywhereDolphin/MyOrthodontist Setup](#) dialog box. The [AnywhereDolphin/MyOrthodontist User Settings](#) dialog box is where you specify individual settings for each billing party and/or user.

<b>Deny Access</b>	Deny access to all information.
<b>View Demographic</b>	Access to patient demographic information.
<b>Update Demographics</b>	Update patient demographic information
<b>Appointment</b>	Access to appointment information.
<b>Schedule Appointments</b>	Schedule appointments through Dolphin Mobile or MyOrthodontist.
<b>Sign-In to Appointments</b>	Allow remote sign-in to appointments, if allowed by the practice.
<b>Online Questionnaire</b>	Access to online questionnaires.
<b>View Patient Images</b>	Access to patient images.
<b>Submit Patient Images</b>	Allow user to take patient photos and submit them to the practice.
<b>Aquarium Videos</b>	Access to media to the Dolphin Aquarium Shared library (if you have added any). Applies only if you have Dolphin Aquarium installed
<b>Send Messages</b>	For secure messaging, allow MyOrthodontist users to send messages to the practice.
<b>Financial Balance</b>	Access to the account balance.
<b>Financial Ledger</b>	Access the ledger to post and view payments.
<b>View Patient Demographics</b>	View patient demographic information
<b>Update Patient Demographics</b>	Update patient demographic information
<b>View Patient Messages</b>	For secure messaging, allow billing parties to view sent/received messages between the patient and the practice.

## Creating and Activating MyOrthodontist Accounts

Once a patient or billing party has downloaded the MyOrthodontist app from the Apple App Store or Google Play to their mobile device, they can create a MyOrthodontist account in one of the following ways:

- [On screen using QR scanning](#)
- [Using a link in an email invitation](#)
- [Using a QR code in a printed letter invitation](#)
- [Creating an Account Manually Using a Verification Code](#)

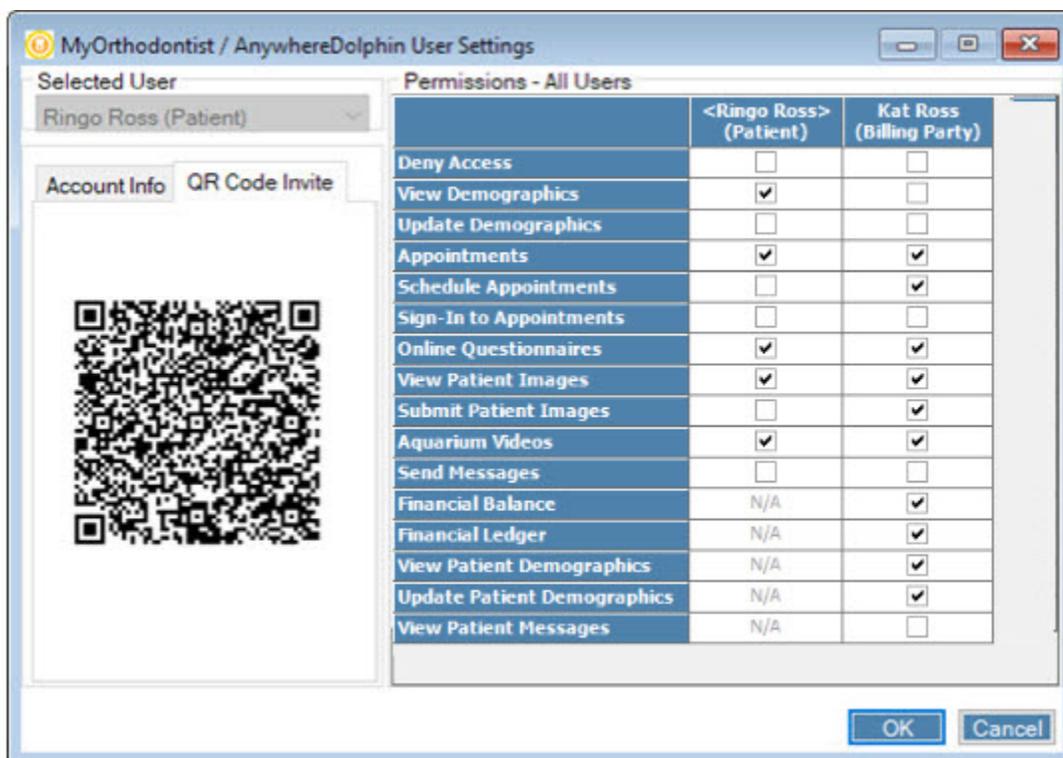
The first three methods are described in the following sections. The manual method is described starting on page 76.

### On Screen Using QR Scanning

You can use this method to create an account while the patient or billing party is in your office and has their mobile device with them.

To create a QR scanning code for a patient or billing party:

- 1 On the [MyOrthodontist / AnywhereDolphin User Settings](#) dialog box, click the [QR Code Invite](#) tab.



- 2 Select the person for whom you want to create a QR code from the [Selected User](#) drop-down list.

If you select a different person, a different QR code, specific to that user, is displayed.

To scan the code if the MyOrthodontist app is installed on the user's mobile device:

- 1 Ask the user to open MyOrthodontist and touch the **Create Account** button.

The following screen opens on the mobile device:

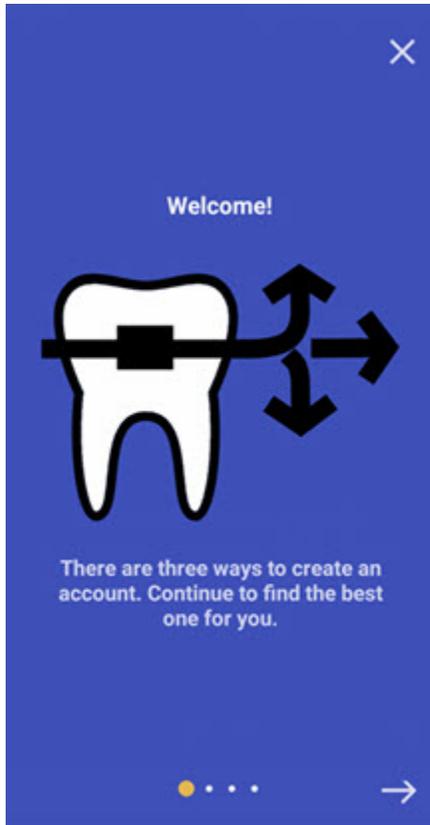


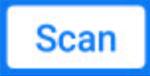
Users who already have an AnywhereDolphin account:

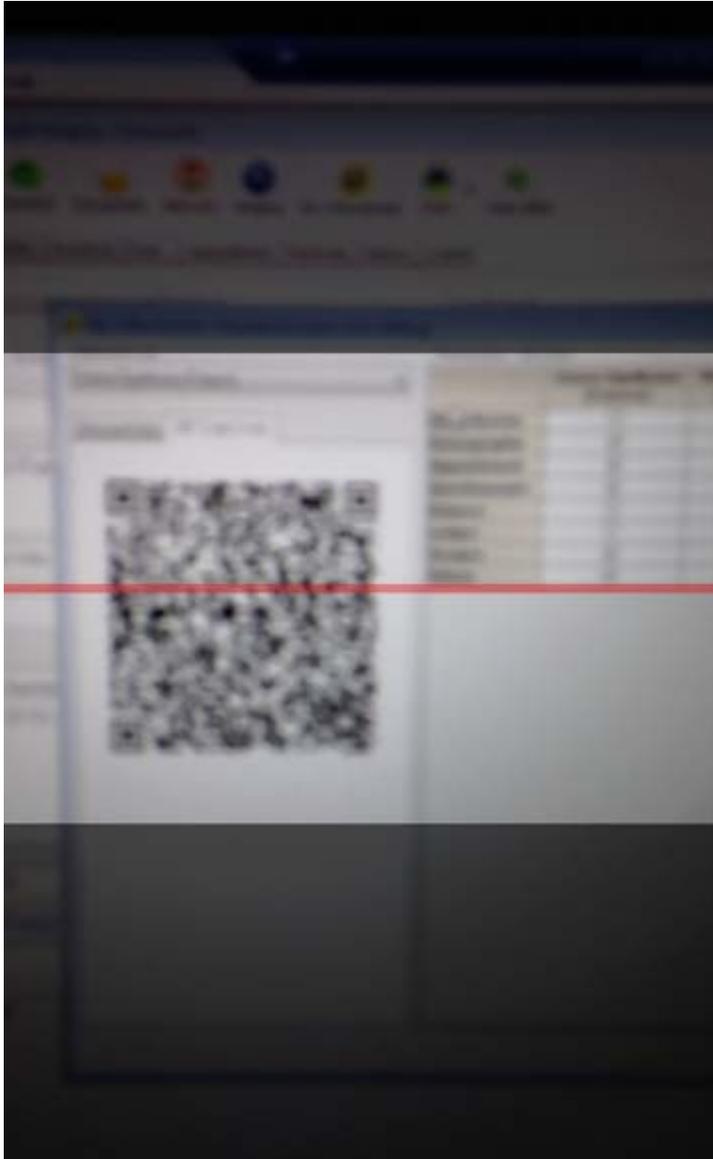
- a Tap the **X** to return to the MyOrthodontist login screen.
- b Enter your AnywhereDolphin user name and password.

Users who do not have an AnywhereDolphin account:

- a Tap the  to continue creating an account.



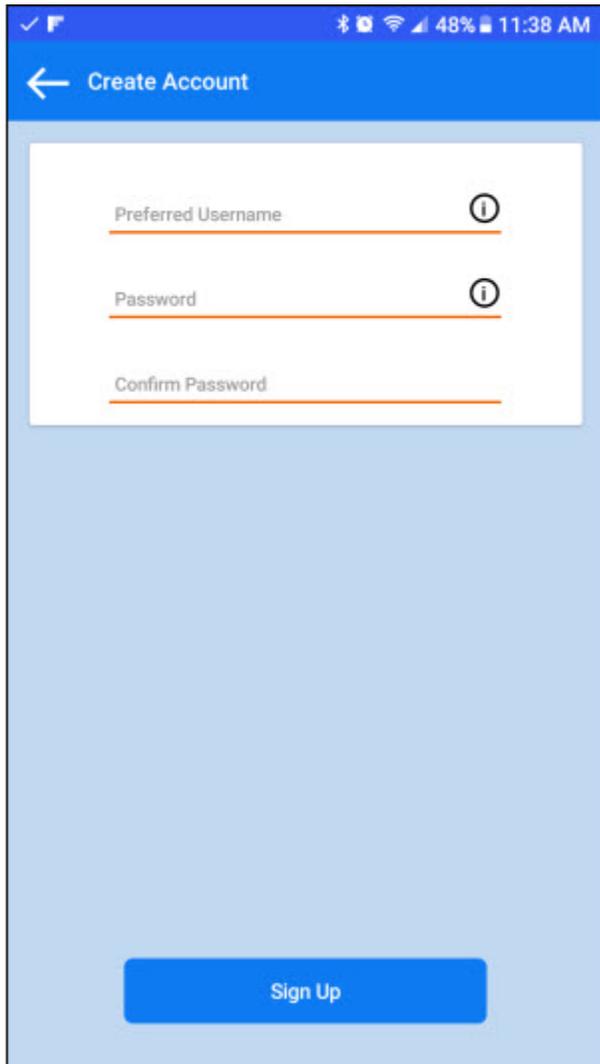
- 2 Ask the user to touch the .
- 3 On the next screen, ask the user to touch the  button.
- 4 With the user's mobile device, scan the QR code on the [QR Code Invite](#) tab.



To scan the code if the MyOrthodontist app is not installed on the user's mobile device:

- 1 Ask the user to open any QR scanning app on his or her mobile device.
- 2 With the user's mobile device, scan the QR code on the [QR Code Invite](#) tab.

After the QR code is scanned, the **Create Account** page opens on the user's mobile browser app.

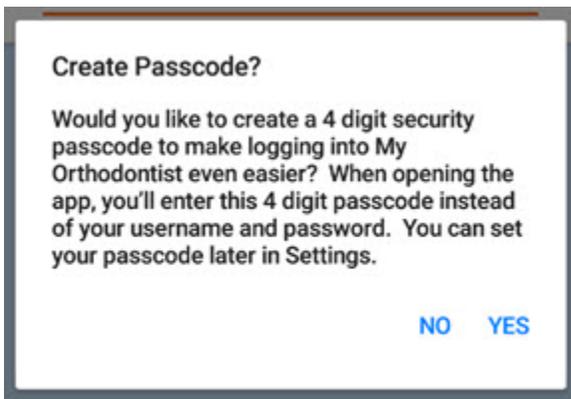


The screenshot shows a mobile browser interface for creating an account. The top status bar displays a checkmark, signal strength, Wi-Fi, 48% battery, and 11:38 AM. The page title is 'Create Account' with a back arrow. The form contains three input fields: 'Preferred Username', 'Password', and 'Confirm Password', each with an information icon. A blue 'Sign Up' button is at the bottom.

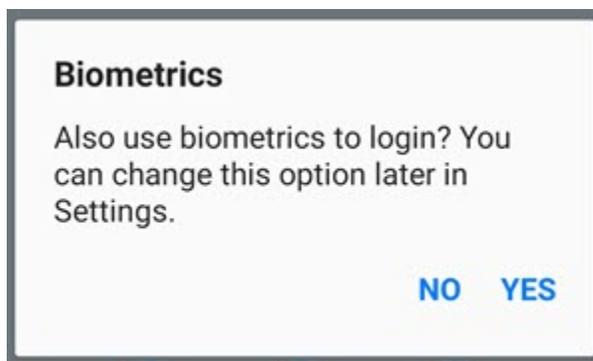
To validate the user's MyOrthodontist account:

- 1 Ask the user to enter his or her desired user name and password, and then touch **Sign Up** to validate the account.

If the MyOrthodontist app is already installed on the user's mobile device, the user is prompted to select a passcode:

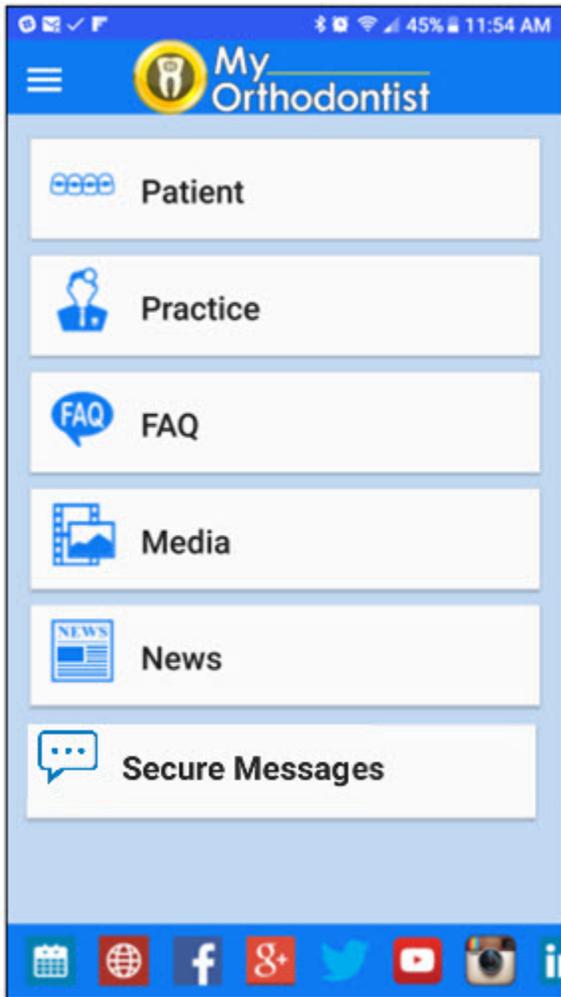


- 2 If the user touches **YES**, he or she is prompted to enter and confirm a passcode. After confirming a passcode, the app prompts the user to enable biometric login, The app prompts you to enable biometric login:



- 3 Do one of the following:
  - Touch **Yes**, to use biometrics.
  - Touch **No** to continue to the app without using biometrics. You can always change your choice later using the [Settings](#) menu in the app.

The app opens on the user's mobile device:



The Secure Messages option appears only if your practice is licensed for MyOrthodontist 5.0 and Dolphin Management 10.5 with a Premium 2-Way SMS or Dolphin Secure Messaging license.

If the MyOrthodontist app is not already installed on the user's mobile device, the user is automatically redirected to the App Store or Google Play to download the app.

**Note:** *If the server cannot detect the device or the device is not running iOS or Android (for example, the device is a Windows Phone), the user is redirected to a generic landing page.*

## Using a Link in an Email Invitation

You can use this method to have a patient or billing party create a MyOrthodontist accounts by clicking a secure link in an email invitation.

To send a MyOrthodontist invitation by email:

- 1 On the **Account Info** tab of the **MyOrthodontist/AnywhereDolphin User Settings** dialog box, click **Send My Otho Invitation** to open the **Send Online Invitation** dialog box.

Or

On the **Patient** tab of the **Edit a Patient** dialog box, right-click on the patient or billing party email address, and select **Send Message** to open the **Email Settings** dialog box.

Or

From the **Dolphin Management Dolphin Interactive Report Tool**, click  **Correspondence**  **Send SMS Messages** to open the **Email Message Setup** dialog box.

- 2 Select one of the MyOrthodontist Invitation templates from the **Email Template** drop-down list.

The following MyOrthodontist invitation and login verification templates are available:

<b>Billing Party - My Orthodontist Invitation</b>	Generates an email message with a link to create a billing party account.  Includes the token field <<MyOrthoBillingPartyInviteLink>>.
<b>Billing Party - My Orthodontist Login Verification Template</b>	Generates an email message including the verification code the billing party will enter when prompted by the MyOrthodontist app. Includes the token <<MobileLoginVerificationCode>>.
<b>My Orthodontist / AnywhereDolphin Username Added/Updated</b>	Generates an email message confirming a patient and/or billing party's AnywhereDolphin or MyOrthodontist user name.  Includes the token field <<MobileLoginUserName>>.
<b>My Orthodontist Invitation</b>	Generates an email message that uses the email addressee type to determine the account type creation link to include.  Includes the token field <<MyOrthoInviteLink>>.
<b>Patient - My Orthodontist Invitation</b>	Generates an email message with a link to create a patient account.  Includes the token field <<MyOrthoPatientInviteLink>>.
<b>Patient - My Orthodontist Login Verification Template</b>	Generates an email message including the verification code the patient will enter when prompted by the MyOrthodontist app. Includes the token <<MobileLoginVerificationCode>>.

The email template you selected appears in the lower part of the window. If you like, you can make changes in this dialog box that will affect only this email message.

**Note:** *If you want to make changes that will affect all future email messages based on this template, click **Edit** to edit the email template itself. For more information, refer to the "Email Templates" section of the Dolphin Management online help.*

- 3 Click **OK** to send the invitation email message.

When your patient or billing party opens the email on his or her mobile device and clicks the link, the [Create Account](#) page opens and prompts the user for the information necessary to set up a My Orthodontist account.

A sample email appears on the following page.

## Sample Email



Dear Sam Jones:

As part of our commitment to providing superior care, we'd like to invite you to download our mobile application MyOrthodontist. MyOrthodontist provides mobile access to the following:

- Appointments
- Account Balance (billing party logins only)
- Questionnaires
- Images
- Media such as patient education videos

As well as practice information, such as:

- About our practice
- FAQs
- Contact info (email, phone)
- Office hours
- Directions
- Media files like practice videos and images
- News Items, RSS fields from your website
- Social media links of the practice such as Facebook, Instagram, YouTube, Twitter, Google+ and Yelp

To easily create your account and download MyOrthodontist, [click this secure link](#) from your phone or tablet. A patient account has access to everything except account balance information.

Please don't hesitate to call or email with questions. We can be reached at (800) 548-7241.

Thank you,

Dolphin Imaging and Management Solutions

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CONFIDENTIALITY NOTICE: This message is intended solely for the addressed recipient(s) and may contain legally privileged and confidential information. Any unauthorized use, disclosure or duplication is strictly prohibited. If you are not the addressed recipient please destroy all copies of the original message.

## Using a QR Code in a Printed Invitation Letter

You can use this method to generate, print, and mail (or email as an attached PDF) a letter to a patient and/or billing party that contains a QR code. Using a mobile device, your client can then scan the QR code to set up their MyOrthodontist account.

To send a MyOrthodontist QR code via printed letter:

- 1 From the Dolphin Management **Main** menu, select **Letters**.

Or,

From the Dolphin Imaging **Tools** menu, select **Super Questionnaire**. Then, select **Super Questionnaire Letters Queue** from the sub-menu.

- 2 On the **Letters** dialog box, click **Add Letter**, and select **Add Single Letter**.

The **Add Letter** dialog box opens.



- 3 Select **Patient** from the **Type** drop-down list if you want to send a printed invitation letter to a patient.

Or,

Select **Billing Party** from the **Type** drop-down list if you want to send a printed invitation letter to a billing party.

- 4 Type the recipient's name in the field below the **Type** drop-down list.

Or,

Click , then click **All** to select from a list of patients or billing parties.

The **Address** field is automatically completed.

- 5 Click  next to the **Document** field, then click **All** to view a list of available letter templates.

- 6 Select one of the MyOrthodontist invitation letter templates, and click **OK**.

- 7 Click **OK** to close the **Add Letter** dialog box.

- 8 Click **Yes** to add another letter.

Or,

Click **No** to return to the **Letters** dialog box.

- 9 When you finish adding invitation letters, check the box for each letter.

- 10 Click  **Print/Email** to print the invitation letters.

For more information on the **Letters** and **Add Letter** dialog boxes, refer to the Dolphin Management online help.

After receiving the invitation letter, the patient or billing party scans the QR code using a scanning app on his or her mobile device. The **MyOrthodontist Create an Account** page opens and prompts the user to enter the information necessary to create a MyOrthodontist account.

A sample merged letter template appears on the following page.

## Sample Letter

Ellen Jones  
60 East End Ave 39C  
Chatsworth, CA 91311

Dear Ellen:

I want to invite you to download our mobile application, **MyOrthodontist**. The **MyOrthodontist** mobile app gives you access to important patient and practice information. Patient information includes access to demographic, appointment, images, account balance (billing party accounts only), Questionnaires and shared Aquarium© patient education videos.

Practice information includes access to about the doctor and staff, FAQs, practice videos and images, news Items, RSS feeds from your website, our social media links to Facebook, Twitter and Google+ and others.

MyOrthodontist runs on iOS and Android devices.

To easily create and download the application, please scan the QR code with any scanning software.

NOTE: There are two account types: the Billing Party account type has access to Account Balance information. The Patient account type does not have access to Account Balance information.



Please don't hesitate to call or email with questions. We can be reached at (800) 548-7241.

Sincerely yours,

Dr. David Dolphin

## Instructions for Patients and Billing Parties

This section provides instructions for patients and billing parties who are not in your practice's office when they are setting up their MyOrthodontist accounts.

You may wish to have your staff copy the information in this section as needed to help your clients set up the mobile app and start using their account. It's also a good idea to familiarize yourself with these processes, so you can answer any questions your patients or billing parties may have.

### Creating an Account from an Email Invitation

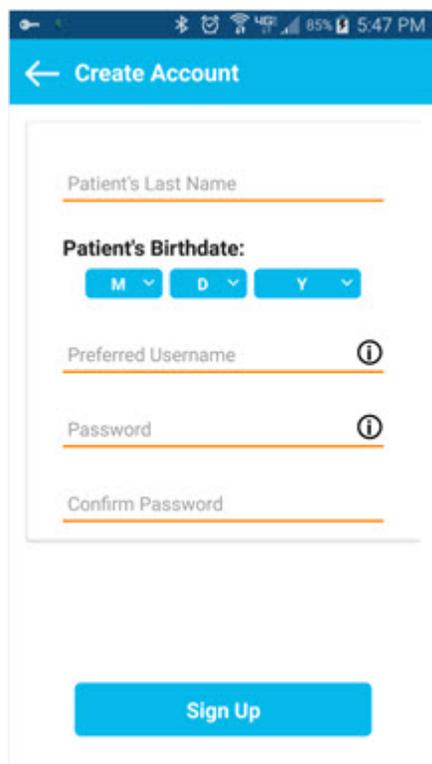
To create your account, if you already have downloaded and installed MyOrthodontist on your mobile device:

- 1 Touch the link in the invitation email.

The [MyOrthodontist Create an Account](#) page opens.

You are prompted to enter the patient's last name, birth date, desired user name and password.

**Note:** *The account type created depends on the token field included in the email invitation.*

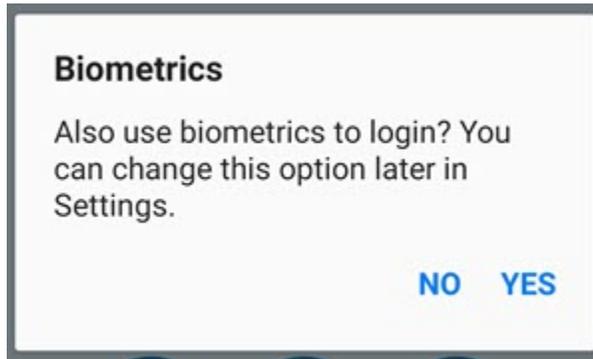


- 2 Enter your last name, the patient's birth date (your birth date, if you are the patient), your preferred user name and a preferred password.
- 3 Click **Sign Up**.

The app prompts you to create a passcode.

- 4 Do one of the following:
  - Touch **Yes**, and create a 4-digit passcode that you can use every time you open the app.
  - Touch **No** to continue to the app without creating a passcode. If you select this option, you can always enter a passcode at a later time using the **Settings** menu in the app.

The app prompts you to enable biometric login:



- 5 Do one of the following:
  - Touch **Yes**, to use biometrics.
  - Touch **No** to continue to the app without using biometrics. You can always change your choice later using the **Settings** menu in the app.

To create your account, if you do not have MyOrthodontist installed on your mobile device:

- 1 Touch the link in the invitation email.

You are directed to the Google Play store if you are using an Android device, or to the Apple App store if you are using an Apple device.
- 2 Download and install the MyOrthodontist app from the Google Play or Apple App store.
- 3 Touch the link in the invitation email again.
- 4 Create your account and optional passcode as described in the previous procedure.

## Creating an Account Using a Printed QR code

How you create your account depends on whether you already have MyOrthodontist installed on your mobile device.

If you have MyOrthodontist installed on your mobile device:

- 1 Open it, and touch the **Create Account** button.

The following screen opens on the mobile device:

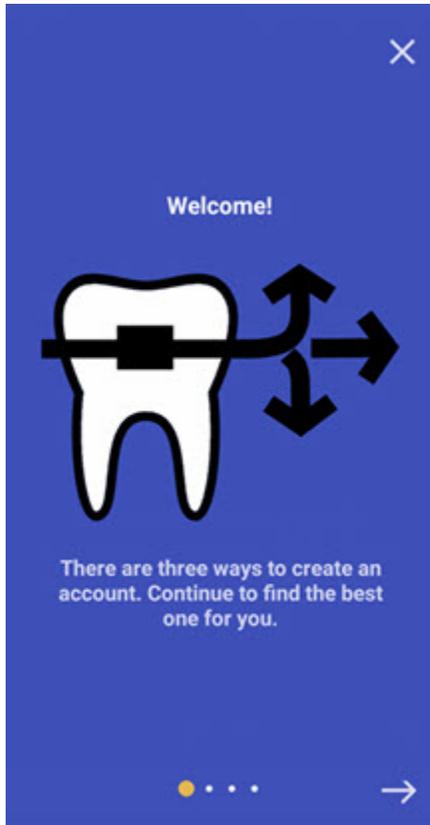


Users who already have an AnywhereDolphin account:

- a Tap the **X** to return to the MyOrthodontist login screen.
- b Enter your AnywhereDolphin user name and password.

Users who do not have an AnywhereDolphin account:

- a Tap the  to continue creating an account.



2 Touch the .

3 On the next screen, touch the  button.

4 Scan the QR code on the printed invitation.

The MyOrthodontist app opens and prompts you to create an account and passcode.

If MyOrthodontist is not installed on your mobile device:

1 Open any QR scanning app.

2 Scan the QR code on the printed invitation.

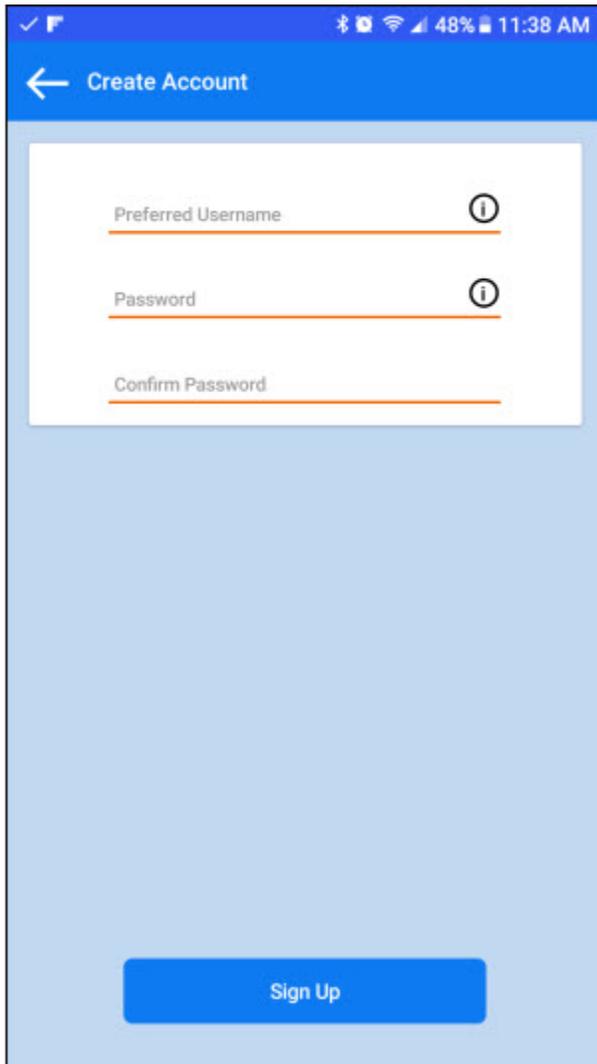
You are directed to the Google Play store if you are using an Android device, or to the Apple App store if you are using an Apple device.

3 Download and install the MyOrthodontist app from the Google Play or Apple App store.

4 Scan the QR code again.

The MyOrthodontist app opens and prompts you to create an account.

**Note:** The account type created depends on the token field included in the letter invitation.



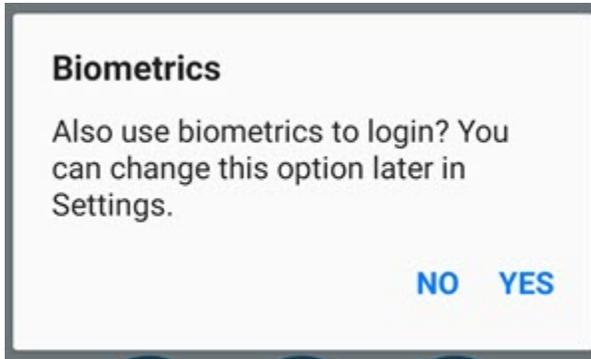
The screenshot shows a mobile application interface for creating an account. At the top, there is a blue header bar with a white back arrow on the left and the text "Create Account" in white. Below the header is a white rectangular area containing three input fields, each with an orange underline and an information icon (i) to its right. The fields are labeled "Preferred Username", "Password", and "Confirm Password". Below the white area is a large light blue section. At the bottom of this section is a blue rounded rectangular button with the text "Sign Up" in white.

- 5 Enter your preferred user name and a preferred password.
- 6 Open the app, and log in using the user name and password entered above.

The app prompts you to create a passcode.

- 7 Do one of the following:
  - Touch **Yes**, and create a 4-digit passcode that you can use every time you open the app.
  - Touch **No** to continue to the app without creating a passcode. If you select this option, you can always enter a passcode at a later time using the [Settings](#) menu in the app.

The app prompts you to enable biometric login:



- 8 Do one of the following:
- Touch **Yes**, to use biometrics.
  - Touch **No** to continue to the app without using biometrics. You can always change your choice later using the [Settings](#) menu in the app.

You can now begin using MyOrthodontist on your mobile device.

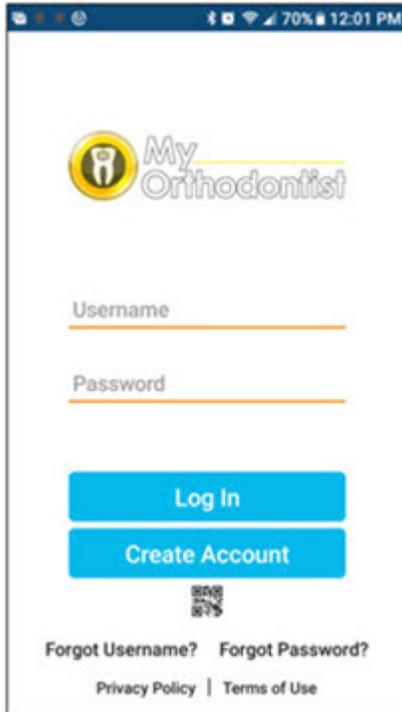
## Creating an Account Manually Using a Verification Code

This section describes how to stay connected with the practice using the MyOrthodontist mobile app.

MyOrthodontist supports Android version 4.0 (Ice Cream Sandwich) or higher, or iOS version 5.2 or higher.

- 1 Download the MyOrthodontist app from the Apple Store or Google Play.
- 2 Open the MyOrthodontist app.

The login screen opens.



- 3 If you have an existing AnywhereDolphin account that you have already verified, log in to MyOrthodontist using your AnywhereDolphin account user name and password.

Or,

If you do not have an AnywhereDolphin account create a new account as follows:

- a Touch the **Create Account** button on the login screen.

The following screen opens on the mobile device:

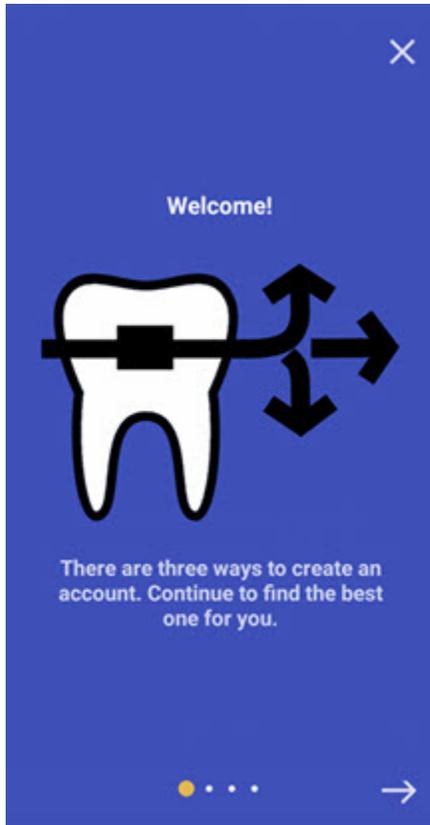


Users who already have an AnywhereDolphin account:

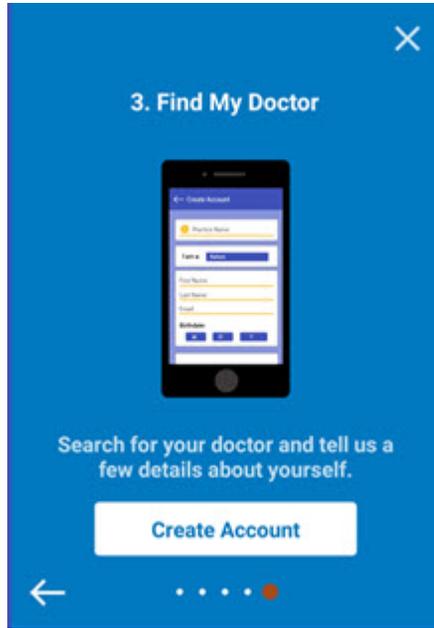
- a Tap the **X** to return to the MyOrthodontist login screen.
- b Enter your AnywhereDolphin user name and password.

Users who do not have an AnywhereDolphin account:

- a Tap the  to continue creating an account.



- b Touch the  until you get to the following screen:



- c Touch **Create Account**.

The [Create Account](#) screen opens:

- 4 Complete the following fields (shown if you selected **I am a patient** above):

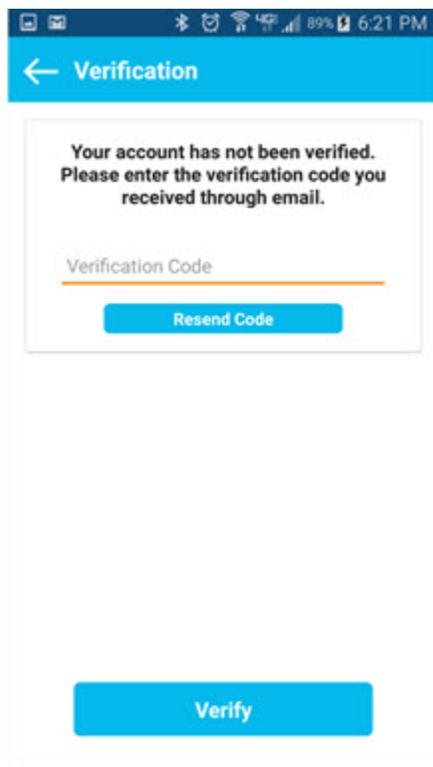
<b>Practice Name</b>	Enter the name of our practice, or your doctor's last name, and select our practice from the list. If you do not see our practice name listed, please contact us. We may not be signed up for MyOrthodontist.
<b>I am a</b>	Select from <b>Patient</b> , <b>Responsible Party</b> , or <b>Both</b> .
<b>First Name</b>	If you are registering as the patient, enter the patient's first name If you are registering as a responsible party, enter the responsible party's first name If you are registering as both patient and responsible party, enter patient's first name.

<b>Last Name</b>	<p>If you are registering as patient, enter the patient's last name</p> <p>If you are registering as a responsible party, enter the responsible party's last name</p> <p>If you are registering as both patient and responsible party, enter patient's last name.</p>
<b>Email</b>	<p>If you are registering as a patient, enter the patient email address.</p> <p>If you are registering as a responsible party, enter the responsible party email address on file at our practice.</p> <p>If you are registering as both patient and responsible party, enter the email address on file at our practice.</p>
<b>Birthdate</b>	<p>Whether you are registering as patient billing party, or both enter the patient's birth date.</p>
<b>Preferred User Name</b>	<p>Enter your preferred user name for the MyOrthodontist app.</p>
<b>Password</b>	<p>Enter a password that is 8 or more alphanumeric characters and that includes at least one symbol. (Passwords are case-sensitive.)</p>
<b>Confirm Password</b>	<p>Key in the password you entered in the previous field to confirm it.</p>

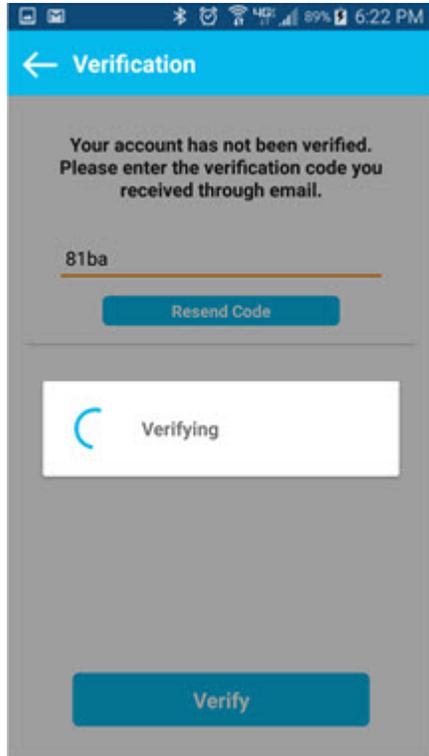
- 5 Touch the **Sign Up** button.

The MyOrthodontist app verifies the information you entered, and one of the following occurs:

- The app opens a verification page, and prompts you to check your email for your MyOrthodontist verification code.



- If our practice server is not currently available, the app displays a message box, prompting you to try again later.
  - If the information you entered is not valid, the app displays a message prompting you to contact the practice.
- 6 After you receive the verification code email, manually enter the code on the app validation code page.  
**Note:** *The verification code expires after 10 minutes; if you do not enter it within that 10 minutes, the practice must generate a new one.*
  - 7 Enter the verification code, and touch **Verify**.

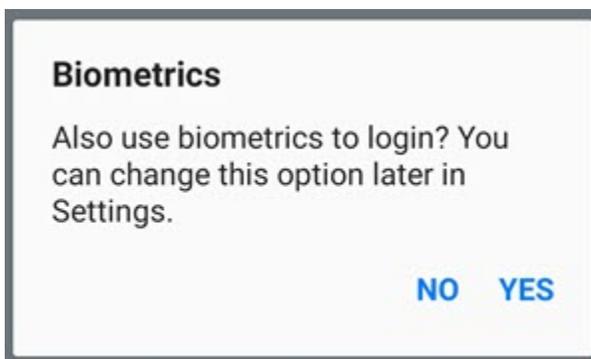


If there is a problem with the code you entered, a message is displayed, and you should contact our practice for assistance.

The app prompts you to create a passcode.

- 8 Do one of the following:
- Touch **Yes**, and create a 4-digit passcode that you can use every time you open the app.
  - Touch **No** to continue to the app without creating a passcode. If you select this option, you can always enter a passcode at a later time using the **Settings** menu in the app.

The app prompts you to enable biometric login:



- 9 Do one of the following:
- Touch **Yes**, to use biometrics.

- Touch **No** to continue to the app without using biometrics. You can always change your choice later using the [Settings](#) menu in the app.

You can now begin using MyOrthodontist on your mobile device.



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## Use MyOrthodontist to Add Appointments to a Mobile Calendar App

After creating their MyOrthodontist account, patients can quickly add scheduled appointments from Dolphin Management to their mobile calendar app. There are two ways to do this:

- Add the appointment while the patient is still in your office:
- Schedule an appointment for a patient, and when the patient logs into MyOrthodontist later, he or she can add the appointment and any other future appointments to his or her personal calendar.

## Add an Appointment While the Patient is in Your Office

To schedule an appointment and have the patient add it to his or her personal calendar:

- 1 Schedule a new appointment from the [Scheduling](#) dialog box.

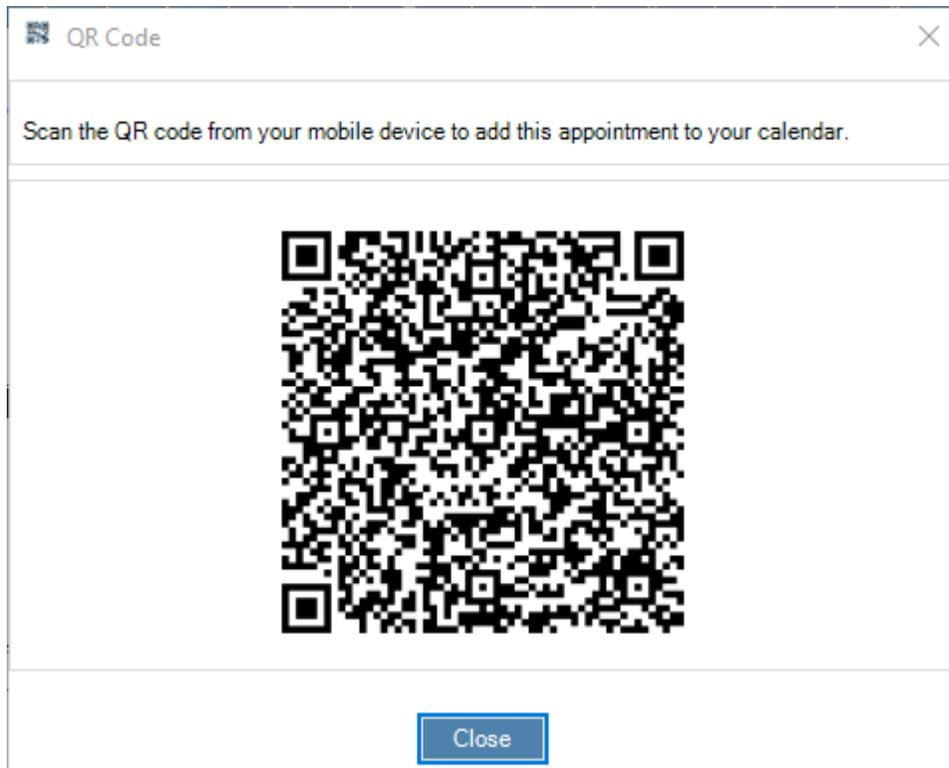
The [Appointment Actions](#) dialog box opens:

The screenshot shows the 'Appointment Actions' dialog box for a patient named Ringo Ross. The dialog box has a title bar with a close button (X) and a 'New Patient Added ORTHO' notification. Below the title bar, there are three checkboxes under 'Additional Actions': 'Satisfies recall (N/A)', 'Make another appointment for this patient', and 'Print school excuse'. Below these is a 'Print Method' section with 'Print to Screen' selected and a 'Change Print Method' button. The 'Send notification email to:' section contains a table with two rows: 'Ringo Ross' (Patient) and 'Kat Ross' (Billing Party), both with their email addresses and 'Use for Reminders' checked. Below the table are 'Select All' and 'Select None' buttons. At the bottom left is a QR code, and at the bottom right are 'OK - Print Slip' and 'OK - No Slip' buttons.

Name	Type	Email	Use for Reminders
<input checked="" type="checkbox"/> Ringo Ross	Patient	katr0ss62@sbcglobal.net	Yes
<input checked="" type="checkbox"/> Kat Ross	Billing Party	katr0ss62@sbcglobal.net	Yes

- 2 Click on the QR code in the lower-left corner of the [Appointment Actions](#) dialog box.

The [QR Code](#) screen opens with a QR code that contains information about the patient and the appointment you just scheduled:

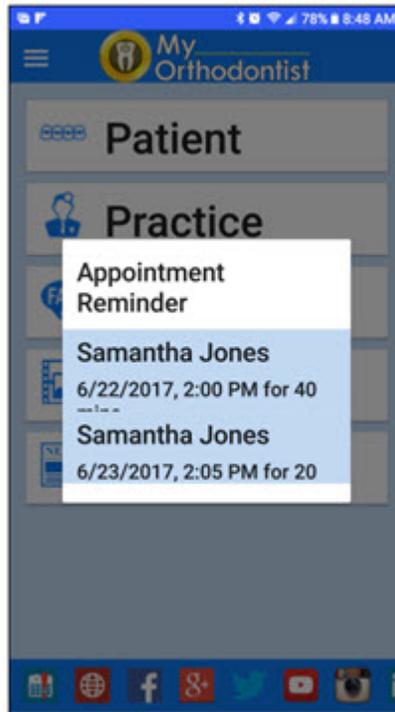
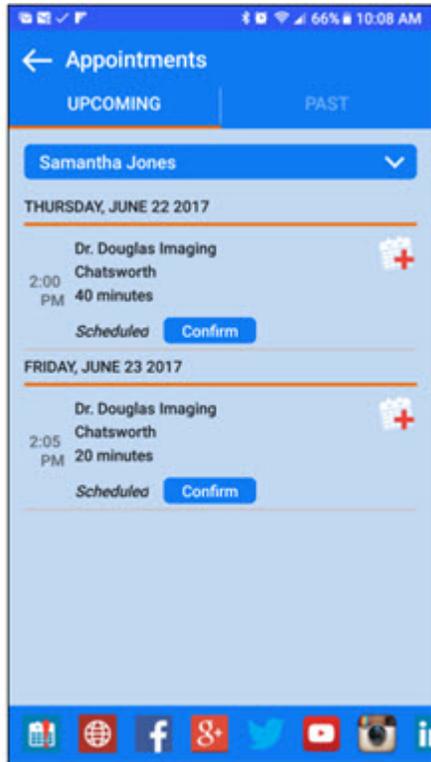


- 3 Ask the patient to open any QR scanning software on his or her device.
- 4 You or the patient can scan the QR code displayed in Dolphin Management, which adds the new appointment information to the patient's personal, mobile calendar.

## Add an Appointment When the Patient is Not in Your Office

Once you schedule an appointment for a patient who has MyOrthodontist, that patient can add the appointment to his or her calendar at any time.

When your patient logs into MyOrthodontist and navigates to the [Appointments](#) screen, a plus sign appears next to the calendar icon as shown in the image at left, below. If push notifications have been enabled, appointment reminders pop-up without the patient having to navigate to the [Appointments](#) screen, as shown on the image at right, below.



- 1 The patient touches the plus sign to add the new appointment to his or her calendar on the mobile device.



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## Enable Electronic Payments

In order for patients/billing parties to be able to pay their balance electronically through MyOrthodontist, the following must be configured in Dolphin Management:

- The 3rd party payment processor your office will use to receive payments through MyOrthodontist and AnywhereDolphin.

MyOrthodontist supports electronic payments through OpenEdge, PayWithBreeze, Vanco, and OrthoBanc, however, you can set up one payment processor only for MyOrthodontist and AnywhereDolphin payments. OpenEdge and PayWithBreeze are available to MyOrthodontist users if your practice also uses them for in-office payment processing.

Setting up payment processors is described in detail in the *Dolphin Management User's Guide* and online help.

- At least one payment method for each billing party who wants to make payments through MyOrthodontist and/or AnywhereDolphin.

This is described in the following section. Also described is what the billing parties will see when making online payments from MyOrthodontist.

## Set up Billing Party Payment Method

To set up a billing party method:

- 1 From the [Add a Patient](#) or [Edit a Patient](#) dialog box, click the [Billing Parties](#) tab.
- 2 Click the Financial sub-tab.

Balances Statement **Financial** Dental

Late Chg./Int.: Late Charge \$15.00

Emp. Status: [Dropdown]

Employer: [Text Input]

Rating: Not Rate [Dropdown]

% Non-Contract Chg. Split: [Text Input]

Show Ledger

Payment Methods

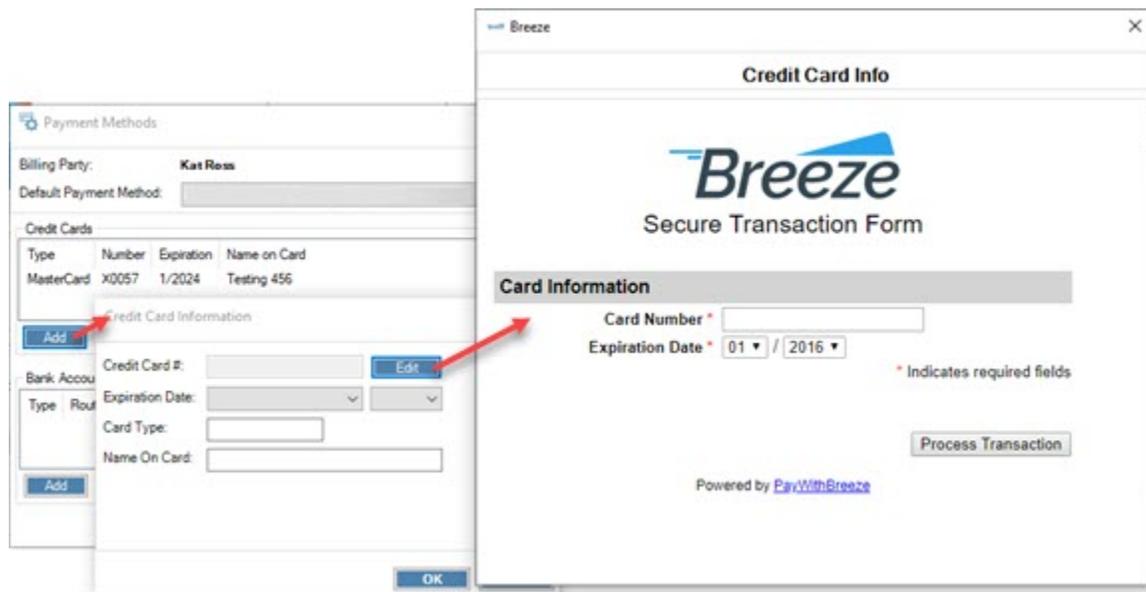
- 3 Click on the **Payment Methods** button.

The **Payment Methods** dialog box opens, and you have the option to add a credit card or bank account as the default payment method. The illustrations in the following steps describe how to add a credit card using OrthoBanc Breeze.

- 4 On the **Payment Methods** dialog box, **Credit Cards** group box, click **Add**.

The **Credit Card Information** dialog box opens.

- 5 Click **Edit**.



- 6 Enter the credit card number and expiration date.
- 7 Click the **Process Transaction** button.
- 8 Enter any required information and optional information in the next screen when prompted.

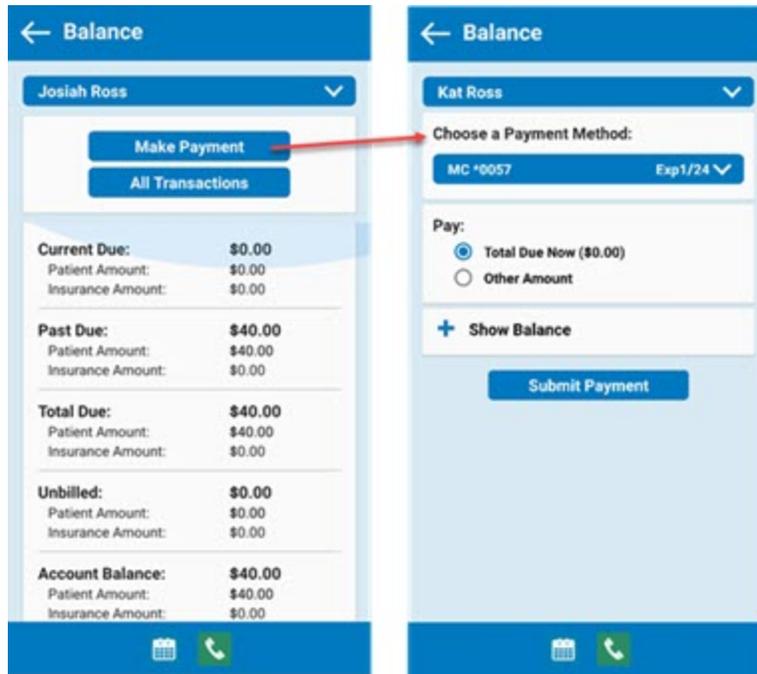
The credit card is added to the **Payment Methods, Default Payment Method** field.

## Pay with MyOrthodontist

This section describes what the billing party using MyOrthodontist will see when making payments using the mobile app.

- 1 The billing party logs into MyOrthodontist, and taps the Patient button to access the patient or patients for which he or she is responsible.
- 2 The billing party touches the Balance button to view the patient's current balance.
- 3 The billing party touches the Make Payment button on the Balance screen.

On the next screen, the billing party can choose a payment method, if there is more than one, specify the amount to pay and submit the payment to your practice:



- 4 The billing party taps the Submit Payment button, and when the Authorize Payment screen opens, touches the Post button.

**Authorize Payment**

I request that a payment in the amount of \$20.00 be made to Dolphin Imaging and Management Solutions Kat using my MC \*0057 Exp1/24 account. By clicking "Post", I authorize this payment request to be processed from my account.

[CANCEL](#) [POST](#)

This is what the billing party sees after posting the payment.



← Balance



Successful payment of  
**\$20.00**

Reference number	206231
Pay from	MC *0057
Payment date	Nov 1 2019

[Share](#) [Done](#)

---

## Set up Signature Capture

In order for patients/billing parties to take advantage of the MyOrthodontist signature capture feature, you must add the appropriate Dolphin Management letter tokens to any letter templates requiring patient/billing party signature or initials.

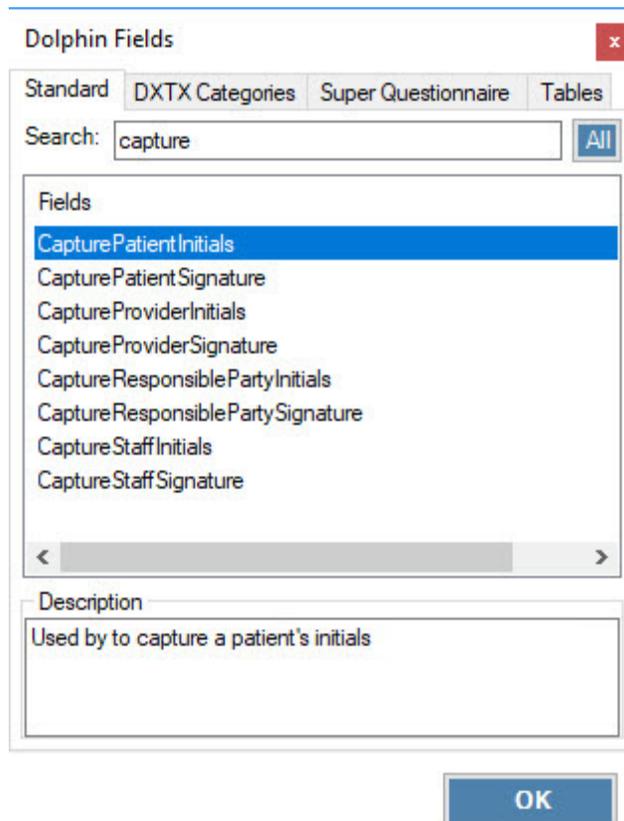
To access these letter tokens:

- 1 From the **Letters** dialog box, click **Fields** button.

This opens the **Dolphin Fields** dialog box.

- 2 In the **Search:** field, enter **capture**.

The letter tokens for capturing signatures and initials are displayed in the **Fields** group box, as shown below:



**Note:** *If you want to use the same letter template for in-office printing/signing as you do for MyOrthodontist, you can change the font color of these tokens to white so they do not show up in the printed document. MyOrthodontist requires these tokens be in the document in order to trigger the signature capture feature described in "Document Signing" on page 9.*

Once you have finished updating your templates, you can share them with patients/billing parties that use AnywhereDolphin and/or MyOrthodontist in any of the following ways:

- Ensure that the mail method is set to [Email w/Secure Attachments](#), and generate the letters from the Letters dialog box.
- Right-click a document and select **Send Securely to->Email Recipient->***recipient\_email\_address*.

This sends the recipient a push notification that a new document has been added to their Documents folder in MyOrthodontist.

## Set up Secure Messaging

Secure Messaging allows you to send attachments and communicate securely over chat message with MyOrthodontist users. Your practice must be running Dolphin Management version 10.5 and above, be licensed for Dolphin MyOrthodontist 5.0+ and one of the following:

- Premium 2-Way SMS Subscription
- Dolphin Secure Messaging Subscription.

To set up Secure Messaging for a patient and/or billing party:

- 1 Open the patient record in Dolphin Management.



- 2 Click **MyOrthodontist** to open the [MyOrthodontist / AnywhereDolphin User Settings](#) screen.
- 3 On the **Account Info** tab for the selected user (patient or billing party), click to check the following check boxes:

The screenshot shows the 'MyOrthodontist / AnywhereDolphin User Settings' window for user 'Kate Ross (Billing Party)'. The 'Account Info' tab is active, showing fields for Username (kateross), Email (katr...@sbcglobal.net), Last Login (3/24/2020), and Number of Logins (8). The 'Permissions - All Users' table is also visible, with the 'Send Messages' checkbox checked for the '<Kate Ross> (Billing Party)' user.

	Elliot Ross (Patient)	<Kate Ross> (Billing Party)
Deny Access	<input type="checkbox"/>	<input type="checkbox"/>
View Demographics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Update Demographics	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Appointments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Schedule Appointments	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Online Questionnaires	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sign-In to Appointments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Images	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aquarium Videos	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Send Messages	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Financial Balance	N/A	<input checked="" type="checkbox"/>
Financial Ledger	N/A	<input checked="" type="checkbox"/>
View Patient Demographics	N/A	<input checked="" type="checkbox"/>
Update Patient Demographics	N/A	<input checked="" type="checkbox"/>
View Patient Messages	N/A	<input checked="" type="checkbox"/>

**Note:** The [View Patient Messages](#) option is so the billing party can view messages between the patient and your practice.

- 4 Click **OK**.

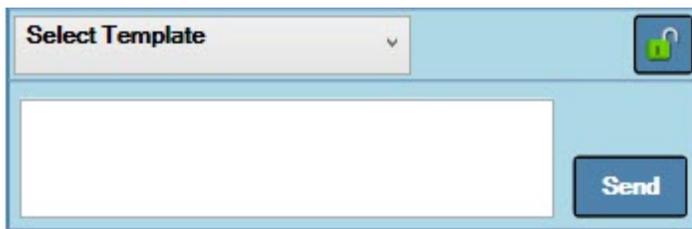
To send a secure message:

- 1 Open the [SMS Messaging Center](#).



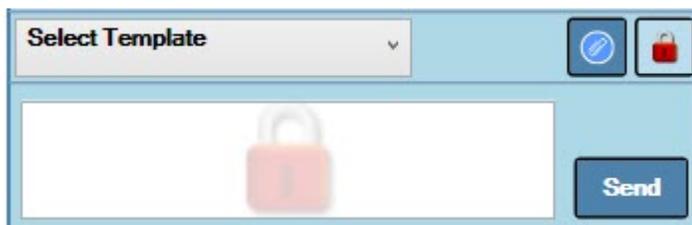
- 2 Click [Send Message](#).

- 3 When prompted, look up the patient or billing party to whom you want to send the message.



- 4 To send using secure messaging, click the , which toggles it to , indicating that the message will be sent using secure messaging.

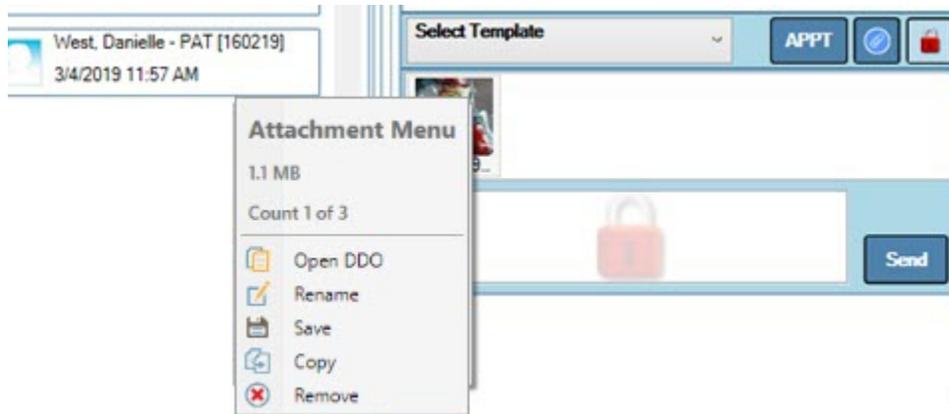
**Note:** An error message is displayed if the intended recipient does not have AnywhereDolphin configured, has not logged into AnywhereDolphin for at least 90 days, or they do not have secure messaging permissions on their AnywhereDolphin account.



- 5 To send an attachment, click the , to open the patient or billing party's DDO folder. From there, you can browse and select a file to send with the message.

**Note:** Dolphin automatically filters the files by supported attachment type. You can filter on Image files (such as BMP, GIF, PNG, JPG, TIFF, etc.) PDF files, Office files, or text files, or ALL Accepted Files. See [Supported File Types for Attachments](#) for a list of supported file extensions.

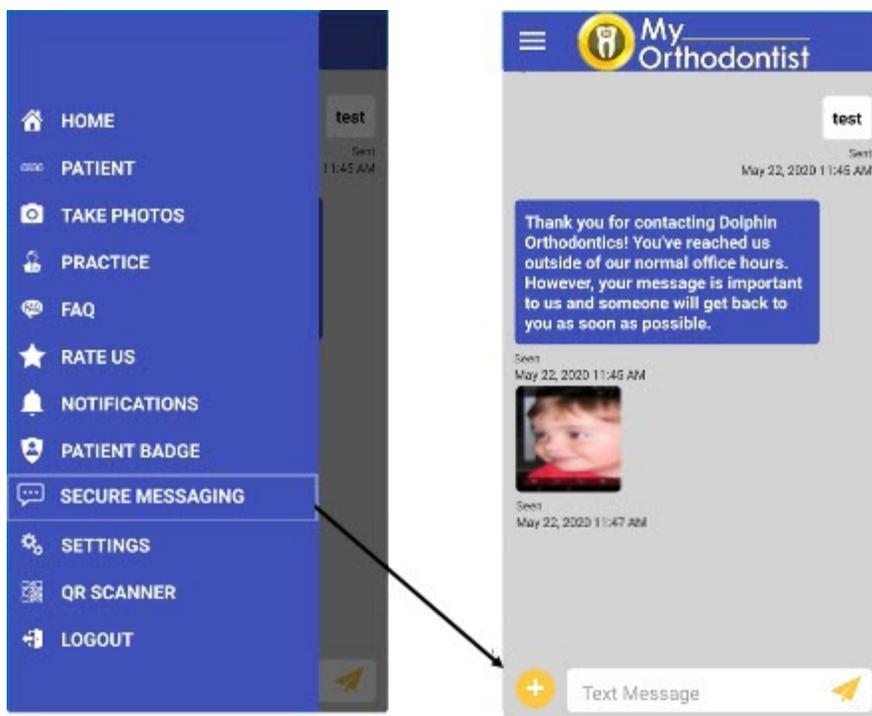
- 6 Right-click on an attachment to see the [Attachment Menu](#), as shown below:



**Note:** The *Attachment Menu* on received attachments does not include the *Remove* option.

7 Click **Send**.

The MyOrthodontist user access these messages via the main menu, **SECURE MESSAGING** option:



You can save incoming attachments to the patient or billing party's folder in the DDO. You can also double-click on an attachment sent from MyOrthodontist to open the file. If you edit and save that file, and it has been saved on MyOrthodontist, the patient and/or billing party can click on that file to refresh it and view your changes. You can see when the message was sent as well as when the recipient opened it.

Additionally, MyOrthodontist users can send and receive URL links, and use a long press to open the link in a web browser and/or copy and paste text to and from secure chat messages.

## Supported File Types for Attachments

The following file types can be attached:

PDF  
RTF  
TXT  
CSV  
DOC  
DOCX  
XLS  
XLSX  
BMP  
GIF  
PNG  
JPG  
JPEG  
SVG  
TIF  
TIFF  
ICS

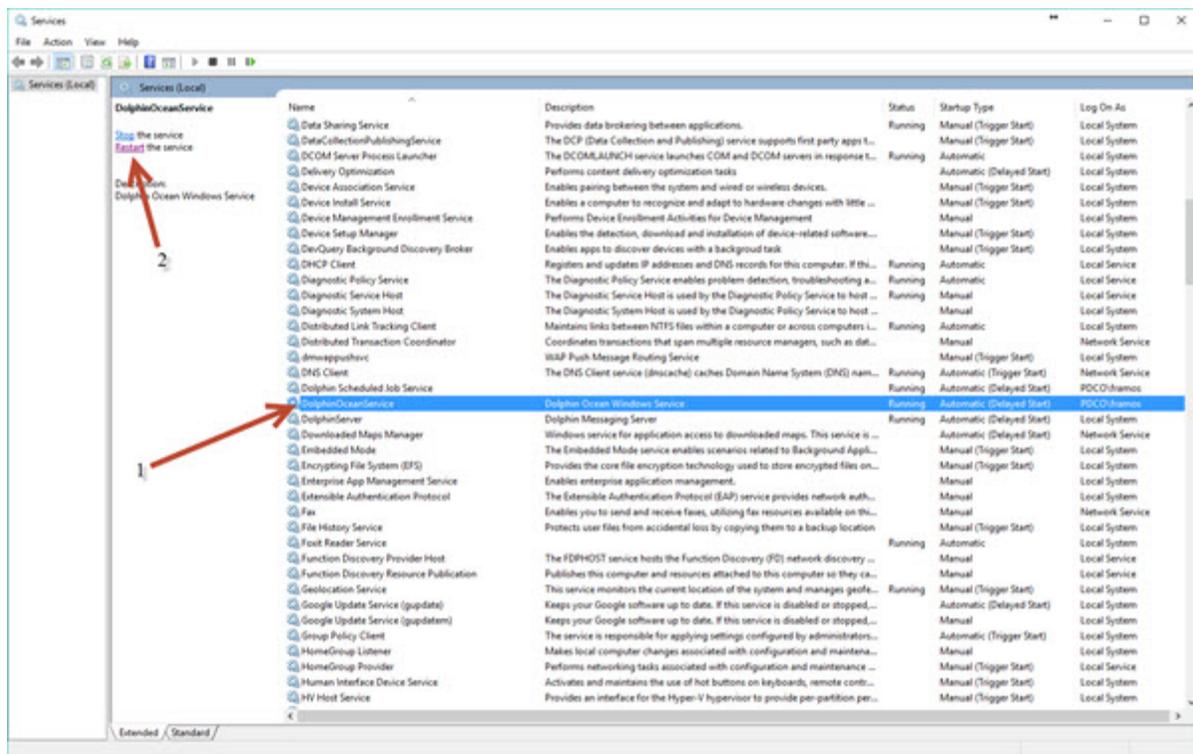
# Frequently Asked Questions

Question: Why can't my patients log into the MyOrthodontist Mobile app?

Answer: The Dolphin Ocean Service is either not running, or you need to restart it.

On the computer where Dolphin Ocean is installed:

- 1 Open the Services desktop app.
- 2 Search for Dolphin Ocean Service, and select it.
- 3 Click **Restart** the service.



Question: How many patients are using MyOrthodontist?

Answer: Log into [www.anywheredolphin.com](http://www.anywheredolphin.com). The MyOrthodontist Setup menu lists the registered and logged in users:



Question: How do I specify what all billing parties/patients can see from the MyOrthodontist app?

Answer: Set the global defaults on the [MyOrthodontist / AnywhereDolphin Setup and Defaults, Permissions](#) tab:

To access the [Permissions](#) tab:

- 1 From the Dolphin Management **Edit** menu, select **Integrations**. Then, select **MyOrthodontist / AnywhereDolphin Setup** from the sub-menu.  
Or,  
From the Dolphin Imaging **Edit** menu, select **AnywhereDolphin**. Then, select **MyOrthodontist Setup** from the sub-menu.
- 2 In the [Default Billing Party Account Permissions](#) and [Default Patient Account Permissions](#) group boxes, respectively, click to check or uncheck the check boxes corresponding to the items you want to share or hide from all patients and billing parties by default:

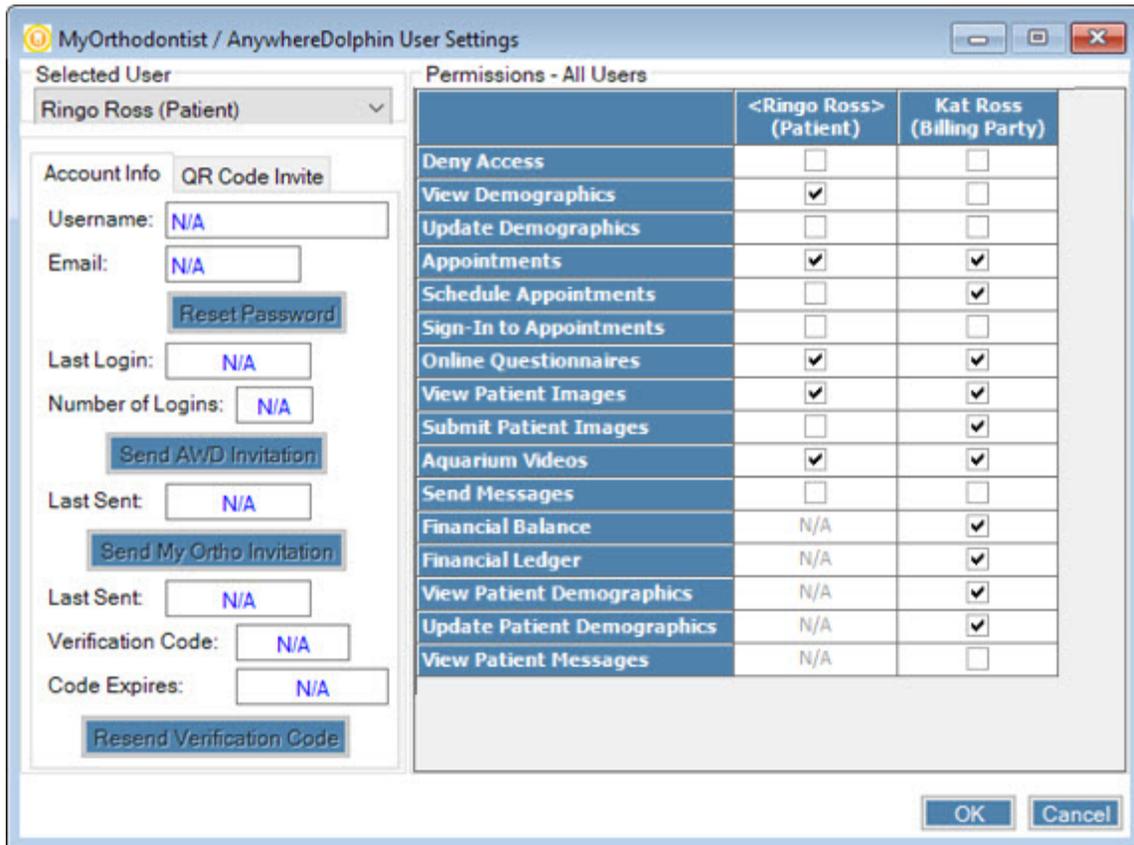
- 3 Click **Update Permissions**.

Question: How do I customize what certain patients or billing parties can see on the MyOrthodontist app?

Answer: Set patient and/or billing party specific access on the [AnywhereDolphin / MyOrthodontist User Settings](#) screen.

To access and specify settings for a patient or billing party:

- 1 From the Dolphin Imaging **Tools** menu, select **AnywhereDolphin-->MyOrthodontist User Settings**.  
Or,  
From the Dolphin Management **Edit a Patient** or **Treatment Card** screen click the **MyOrthodontist** button.



- 2 Check the boxes associated with items to you want to share.

When a billing party creates an AnywhereDolphin account, he or she can have access by default to everything you allow on the **Permissions** tab on the **AnywhereDolphin/MyOrthodontist Setup** dialog box. The **AnywhereDolphin/MyOrthodontist User Settings** dialog box is where you specify individual settings for each billing party and/or user.

<b>Deny Access</b>	Deny access to all information.
<b>View Demographic</b>	Access to patient demographic information.
<b>Update Demographics</b>	Update patient demographic information
<b>Appointment</b>	Access to appointment information.

<b>Schedule Appointments</b>	Schedule appointments through Dolphin Mobile or MyOrthodontist.
<b>Sign-In to Appointments</b>	Allow remote sign-in to appointments, if allowed by the practice.
<b>Online Questionnaire</b>	Access to online questionnaires.
<b>View Patient Images</b>	Access to patient images.
<b>Submit Patient Images</b>	Allow user to take patient photos and submit them to the practice.
<b>Aquarium Videos</b>	Access to media to the Dolphin Aquarium Shared library (if you have added any). Applies only if you have Dolphin Aquarium installed
<b>Send Messages</b>	For secure messaging, allow MyOrthodontist users to send messages to the practice.
<b>Financial Balance</b>	Access to the account balance.
<b>Financial Ledger</b>	Access the ledger to post and view payments.
<b>View Patient Demographics</b>	View patient demographic information
<b>Update Patient Demographics</b>	Update patient demographic information
<b>View Patient Messages</b>	For secure messaging, allow billing parties to view sent/received messages between the patient and the practice.

3 Click **OK**.

Question: My patient is having problems creating a MyOrthodontist account.

Answer: Open that patient's record in Dolphin Management, and make sure the record includes the patient's birthday and email address.

Question: How do I reset a patient or billing party's password?

Answer: Reset patient/billing party passwords on the [AnywhereDolphin / MyOrthodontist User Settings](#) screen.

Question: How do I generate and send a new verification code to a patient or billing party who is trying to create a MyOrthodontist account

Answer: Resend verification code on the [AnywhereDolphin / MyOrthodontist User Settings](#) screen.

**Note:** *The verification code expires after 10 minutes; if the patient or billing party does not enter it within that 10 minutes, the practice must generate a new one. The [AnywhereDolphin / MyOrthodontist](#)*

User Settings screen shows the last verification code that was sent to the patient or billing party and the time that code expires

The screenshot shows a software interface for managing user settings. The main window is titled "Edit a Patient - Elliot Ross [180233] - Dr. Dolphin - Chatsworth". The "MyOrthodontist" icon in the top toolbar is highlighted with a red arrow and labeled "1".

The "MyOrthodontist / AnywhereDolphin User Settings" dialog box is open, showing the following information:

- Selected User:** Kat Ross (Billing Party)
- Account Info:** QR Code Invite
- Username:** katross
- Email:** katross52@hbcglobal.net
- Last Login:** 11/1/2019 (highlighted with a red arrow and labeled "2")
- Number of Logins:** 95
- Last Sent:** N/A
- Last Sent:** N/A
- Last Sent:** N/A
- Last Sent:** N/A

The "Permissions - All Users" table is also visible:

	Elliot Ross (Patient)	<Kat Ross> (Billing Party)
Deny Access	<input type="checkbox"/>	<input type="checkbox"/>
View Demographics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Update Demographics	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Appointments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Schedule Appointments	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Online Questionnaires	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Images	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aquarium Videos	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Financial Balance	N/A	<input checked="" type="checkbox"/>
Financial Ledger	N/A	<input checked="" type="checkbox"/>
View Patient Demographics	N/A	<input checked="" type="checkbox"/>
Update Patient Demographics	N/A	<input checked="" type="checkbox"/>

