

This guide describes the **PreViser® Oral Health Information Suite (OHIS)** and element descriptions.

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Version History

Revision Level	Date	Description	
1.0	June 3, 2016	Original	
1.1	June 4, 2016		
1.2	June 13, 2016		
1.2.1	March 2017	Reformat and added encryption key and timeout information.	
1.2.2.	March 2017	Added patient validation and successful creation dialogs.	
1.2.3	April 2017	Updated for function	
1.2.4	May 2017	Updated Access Code graphic	
1.2.5	June 2017	Updated Graphics for Left Bar Menu Options	
1.2.6	November 2017	Updates to Patient Verification, Return of Benefits, User Pins and description of Periodontal Stability Score/graphic	
1.3	February 2018	Updates to graphics, access to OHIS and chat function of website	
1.3.1	February 2018	Updates to patient engagement graphic, Provider support, and Admin reports	
1.3.2	June 2018	Addition of the Home Care Report, English/Spanish Language OHIS report translation	
1.3.3	October 2018	Home Care Report update, PINs update; updated contact information	
1.3.4	January 2019	Removed MyAccount information and updated OHIS screenshots	
1.3.5	February 2019	Updated screenshots of MyAccount/Support	
1.3.6	December 2020	Updated Encryption Key section and screenshots	

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Hint: When you see words in this documentation in blue and underlined, they are hyperlinks that if clicked, will take you to a section of this documentation providing more information about the underlined word(s), or to an external web resource.

YOUR PREVISER LICENSE

As an oral health professional, you have been granted an unlimited usage license to the PreViser Oral Health Information Suite (OHIS). This license can be used on as many patients as you wish and you will never be required to pay for access to the service. In the future, PreViser may offer additional services you may elect to subscribe to, but the basic service described in this documentation is free.

Additional Resources

In addition to this User Documentation there are resources available to you at PreViser University located at <u>www.previser.com</u> -> PreViser University. Here you will find instructional videos, as well as white papers on PreViser, scientific research and other downloadable resources.

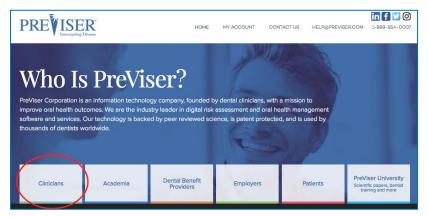
NEW HELP FROM PREVISER

PreViser is now offering to manage your account encryption key on your behalf. What does this mean for you? If you have created and managed the encryption key for your practice location, you must keep the key in a safe place because clearing the browser cache or unregistering your computer will eliminate the key from your browser, making it impossible to view your patient list. To read more about encryption keys, please click <u>here</u>.

For user's ease in cases where you cannot retrieve the key, PreViser now offers to manage the key for you, which means you'll always have access to your patient list. Contact PreViser at <u>help@previser.com</u> to learn more about this key management.

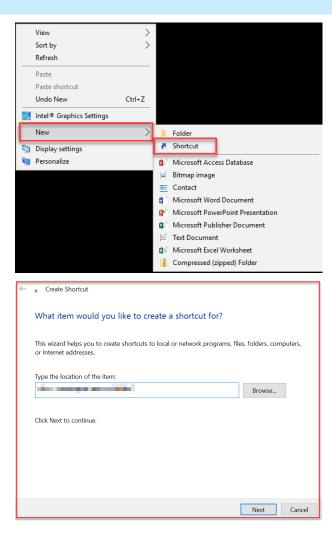
GETTING STARTED WITH OHIS

You can reach the OHIS URL from <u>www.previser.com</u>, and navigating to the "Clinicians" tab, and clicking on Access PreViser OHIS Here," or directly by entering this URL into a browser: <u>https://secure.previser.com/ohis</u>.



To create a shortcut

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



continued

- 3. Enter <u>https://secure.previser.com/ohis</u> into the Shortcut address box.
- 4. Click Next.

- 5. Enter the name of the Shortcut (PreViser) into the box.
- 6. Click Finish.

You will now have a shortcut displayed on your desktop labeled PreViser. The appearance of this shortcut depends on which browser you prefer to use.

÷	* Create Shortcut
	What would you like to name the shortcut?
	Type a name for this shortcut:
	Click Finish to create the shortcut.
	Finish Cancel

Best Practices for Implementing PreViser in a Practice

When implemented correctly, using PreViser in the dental practice to help guide treatment planning and patient communication results in enhanced practice productivity, efficiency, and patient satisfaction. From experience, we've found the following tips to be helpful to beginning users in determining how best to adopt a PreViser protocol:

- A patient record must be created for each patient to be assessed, and this is best done by front office staff when the appointment is made. This ensures that if <u>patient verification services</u> for an insurer are available, any corrections to insurer identifiers needed to transmit PreViser scores to the insurer for enhanced benefit determination can be easily made without disrupting the examination work flow.
- 2. During chart review, patients to be PreViser assessed can have that assessment pre-populated from the patient record and <u>saved</u> for recall later in the day when the patient presents. This can save a lot of time for initial assessments.
- 3. If at all possible, it is strongly recommended that all patients be routinely PreViser assessed even if the clinician doesn't think they have elevated risk or severity of oral disease. This is because the system is able to detect oral disease at its very earliest stages, before it becomes obvious to the patient or clinician. When detected early, oral disease can largely be prevented from further deterioration, and the <u>PreViser patient report</u> will help the patient understand why you are encouraging them to be compliant with your recommendations in order to maintain optimal oral health.
- 4. At recall appointments, always choose <u>"Load the Last Assessment Values"</u> from the prior assessment. This allows the clinician to reduce the time it takes to do a patient assessment from a couple of minutes to a few seconds, as only changed values since the last appointment need to be noted.

Accessing the OHIS

When you launch the OHIS for the first time from <u>https://secure.previser.com/ohis</u> you will be prompted for the username and password you created when you registered.

Additionally, individual users will be prompted for their individual pin number, or the PIN that was created when registering if no additional users have been set up yet.

PreViser Oral Health Info	mation Suite (OHIS)	[Log_On] Try new version: Clinical Suite v5
PREVISER	Start using the new version of PreViser	
Support	Easier to use interface	
MyAccount	Works on iPad Email reports to patients Many more features to make using the tool quicker, easier, and more patients Try the new version of PreViser and update your bookmarks.	e valuable to your
	Or to use the old version	
	Username	
	Password	
	PIN	
	Remember me?	
	Log In	

Enter those values, and click Log In.

	PreViser Oral Health Information Suite (OHIS)	[Le <u>g.On</u>] <u>Try new version: Clinical Suite v5</u>
Clicking on Support will reroute you to	Support Start using the new version MyAccount Easier to use interface MyAccount Email reports to patients May here the using patients May more features to make using patients Try the new version of PreViser and up Or to use the old version	the tool quicker, easier, and more valuable to your
the PreViser Support website.	Username Username Password PN Remember me? Log In	
PI	Getting started webinars do	Return to PreVisero
	GETTING STARTED Find everything you need to get started with PreViser.	ow-to more about the science behind the PreViser Viser technology.
This is the PreViser Support landing page.	TRAINER RESOURCES Ver you a trainer who is helping other people CONTACT US Create a support ticket, schedule a we	
ouici	Iearn how to use PreViker/Use these or get live support resources to train others. READ MORE READ MORE READ MORE CINKS: REQUEST SUPPORT CREATE/MANAGE ACCOUNT C	about our company.
	PreViser Oral Health Information Suite (OHIS)	[Leg.Qn
	Support MyAccount Support MyAccount Support Su	Try new version: Clinical Suite v ersion of PreViser using the tool quicker, easier, and more valuable to your
Clicking on MyAccount redirects you to the	Try the new version of PreViser a	nd update your bookmarks.

Clicking on MyAccount redirects yo MyAccount application for account management.

Or to use th	e old version
--------------	---------------

Username		
Password		
lassion		
PIN		
Remember me?		
Log In		

ENCRYPTION KEYS

All new accounts that register after June 30, 2020 will have their encryption keys managed for them by PreViser. If you created your PreViser account before June 30, 2020, the following instructions will explain how to set up and manage your encryption key.

Note: to have PreViser manage your key, refer to New Help from PreViser.

SETTING UP AN ENCRYPTION KEY FOR YOUR PRACTICE

The first time you access PreViser from a computer, you will be asked to create an encryption key consisting of a minimum of 8 characters comprised of letters, numbers or special characters. The creation of your encryption key is needed, along with its combination of your username, in order to encrypt your patients' data before you transmit it over the Internet for analysis by PreViser. This is a requirement of HIPAA and is needed to protect your patients' privacy. Your data, once analyzed, is stored encrypted on PreViser servers and returned to your computer where it is decrypted using the same key.

It is very important that you do not lose your encryption key, because if you do, any patient records encrypted with the lost key will not be able to be accessed by you in the future. PreViser cannot tell you what your lost key is—we can only force our system to allow you to create a new key. But again, the new encryption key will not allow you the ability to retrieve records encrypted with the lost key, so keep the key in a safe place or written down.

More information on Encryption keys can be found here: https://free.previser.com/

and at PreViser University located at the <u>www.previser.com</u> website.

Make up your encryption key, write it down in a safe place, and enter it when prompted here:

PreViser Oral Health Information Suite (OHIS) previserdental - Karen O'Connor (Log Off)			
lost			
If your office has not made up an Encryption Key: • Make up your own and enter it below.			

continued

The first time you enter the value you have decided upon, this key is permanently associated with your username. You will enter exactly the same key into any other device or computer you wish to access PreViser. Once those devices or computers are registered with this key you will not be prompted for it again, UNLESS:

- 1. You change the Internet browser you are using. This is because this key is stored locally in browser memory, so if you change browsers, you will have to re-enter the key to use the new browser, or
- 2. You clear out all saved passwords and files from your browser memory. The 'look and feel' of this function differs by browser. But, if a computer that could access PreViser, but now no longer can, it may be due to clearing the browser memory and the computer no longer has the stored encryption key. When this happens, you will be prompted in OHIS to setup Privacy Encryption again for this computer, as seen in the graphic above.
- 3. You have clicked on Options/Settings on the left menu within OHIS and clicked "Unregister Computer."

*If you would like to have PreViser manage your encryption key on your behalf, please contact PreViser at <u>help@previser.com</u>.

Lost Encryption Keys

As noted above, if you lose your key we cannot retrieve it for you. **However**, if you have any computer or device that can access PreViser and display patient records, that computer or device will have the key stored locally and you can view that value to find out what it is.

To access this function:

- 1. Go to the computer/device that can access PreViser and display patient records.
- 2. Select **Options / Settings** from the left hand navigation bar.



continued

3. On the next page, select **Encryption Password**.

4. On the next page, click on the link to **Retrieve Encryption Key**, and the encryption key value will display.

rowse Patients	Set my encryption password
Create Patient	Encryption Password
Infinished Assessments	
Options / Settings	Unregister this computer
Admin / Practice Reports	Unregister Computer
Support	Home Care Report
MyAccount	Enable Home Care Report
	Edit Recommendations

Lost Username or Password

If you forget your username and password, you can retrieve or reset them from My Account at <u>https://my.previser.com</u>. Here you will see these options:

	Log in				
	Username				
	Password				
	🔒 Log in				
Retrieve Password Retrieve Usernam					

You can reset your password by clicking on the above link, or retrieve your username by clicking on that link. You must have the email address you provided when you first registered for PreViser. Don't hesitate to call PreViser support at **1.888.854.0007 for help** with your account.

Time Out Feature

To ensure compliance with new HIPAA IT security requirements, users of the PreViser OHIS will see a new pop-up appear after 10 minutes of data entry inactivity, and 10 minutes after that you will be automatically logged off the system if you do not click the "Continue" button. If you are automatically logged off, *any unsaved data will be lost* and will need to be re-entered to complete the assessment. If you believe you are going to be longer than 10 minutes away from data entry, be sure to click "Save for Later" so you do not lose any unsaved clinical data entered.

PreViser Oral Health Information Suite (OHIS) previserdental - Karen O'Connor (Log Off)				
PREVISER	Patient Details			
Browse Patients	To deactivate patient, uncheck this box.	Start New Assessment		
Create Patient	Active Select Patient Insurance Company	Comprehensive → Perio, Caries, and Oral Cancer		
Unfinished Assessments	None / Other Please select the insurance company of the patient you are evaluating.	Perio →		
Options / Settings	Please enter the name as it appears on the dental insurance card. Patient First Name *	Caries →		
Admin / Practice Reports	Security Alert	er →		
Support	Due to inactivity, your session will time out in 09:02.	essments		
MyAccount	An unfinished patient chart or risk assessment will not be saved. Click Continue below to return to PreViser before you are logged off. If you are completing a risk assessment for a patient and you are going to be away from PreViser for longer than 10 minutes, be sure to click "Save for Later" so patient information is not lost. Log Off Continue on the continue of the contin			
	Notes	Clinical Access Code		

USING THE OHIS

Once a computer is registered with your encryption key you will see the following Home Page:

PreViser Oral Health Information Suite (OHIS)		previserdental - Karen O'Connor (Log Off)	
PREVISER	Browse Patients		
Browse Patients		Create New Patient	
Create Patient			
Unfinished Assessments	No Patients.		
Options / Settings			
Admin / Practice Reports			
Support			
MyAccount			
Home Privacy, End User License Agreement © copyright 2003 - 2019 PreViser Corp. All Rights Reserved.			

Creating Patients

In order to assess a patient, a PreViser patient record must be created. Click on the **Create Patient** link or the **Create New Patient** button on the Home Page.

eViser Oral Health In	formation Suite (OHIS)	previserdental - Karen O'Connor (<u>Log Off</u>)
	Browse Patients	
Browse Patients		Create New Patient
Create Patient		
Unfinished Assessments	No Patients.	
Options / Settings		
Admin / Practice Reports		
Support		
MyAccount		

continued

The following Patient Details page will display:

Select Patient Insurance Company. This field will associate the patient with a dental insurer. If you do not see the insurer of the patient listed, or if the

patient is uninsured, select **None/Other** from the drop down list.

Depending on the insurance company and the way in which they are using PreViser scores, selecting an insurer will change the appearance of the patient details page. Please see the information contained in the section on <u>Special data</u> <u>fields by insurer</u>.

Patient First Name Required field.

Patient Last Name Required field.

Gender: Patient identifies as Required field.

Patient Date of Birth: Required field.

Phone Number Optional field, rarely collected.

Notes Optional field.

It is important to note that fields without an asterisk are not submitted to the insurance carrier, i.e., any notes added to

the notes section are not viewable by the insurance carrier.

Patient Verification

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

If you enter information that does not match what is in the insurance company's records, the graphic to the right will display:



continued

Create a New Patient			
Select Patient Insurance Company			
None / Other			
Please select the insurance company of the patient you are evaluating.			
Please enter the name as it appears on the dental insurance card.			
Patient First Name *			
Patient Last Name *			
Gender: Patient identifies as *			
Female			
O Male			
Patient Date of birth *			
ex. 7/25/1967			
Phone Number			
Notes			
Save			

×

Ok

×

If the patient verification system of the insurance carrier is offline or unreachable, the insurance verification dialog displays, as seen in the graphic to the right here:

If the verification request did reach the verification service, but was not processed successfully, the verification service will send back an error message.

Sometimes, checking and clicking retry will send the request for verification again. However, if the user clicks "Continue Anyway," and enter the correct information about the patient, the enhanced benefits for the patient may not immediately be displayed or approved on the benefits lookup.

This service is currently offline. Risk assessments will not go through patient verification. Enhanced benefits may not be immediately approved for this patient or displayed on benefit lookup on The risk assessment you submit will have an effective date for enhanced benefits on the date you click "Finish" for eligible and qualified risk assessments. We apologize for any inconvenience.

Insurance Verification

Insurance Verification

Your request cannot be processed. Please check your entries and try again.

If you have already attempted a retry, select Continue Anyway. Risk assessments will not go through patient verification. Enhanced benefits may not be immediately approved for this patient or displayed on benefit lookup on . The risk assessment you submit will have an effective date for enhanced benefits on the date you click "Finish" for eligible and qualified risk assessments. We apologize for any inconvenience.

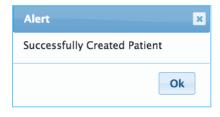
Retry Continue Anyway

Patient Details Page

Once the patient details page has been populated, click **Save.** If you selected **None** for the insurance status of the patient, you will be prompted to verify the patient is uninsured:

 Confirmation Required
 X

 No insurance selected, do you want to continue?
 Ok



was created successfully:

Once you confirm this status, an alert message will confirm that your patient

Then the Patient Details page displays.

The following functions can now be accessed from this page:

Deactivate patient

Uncheck the **Active** box and the patient record will not display on the list of active patients on the Home Page.

Start New Assessment

Click one of these choices to open a Caries, Periodontal, Oral Cancer, or Comprehensive Assessment. PreViser Oral Health Information Suite (OHIS)

PREVISER Patient Details

Browse Patients	To deactivate patient, uncheck this box.	Start New Assessment
	 Active 	
Create Patient	Select Patient Insurance Company	Comprehensive → Perio, Caries, and Oral Cancer
Jnfinished Assessments	None / Other 🔹	
	Please select the insurance company of the patient you are evaluating.	Perio →
Options / Settings	Please enter the name as it appears on the dental insurance card.	Caries →
	Patient First Name *	
Admin / Practice Reports	Brian	Oral Cancer \rightarrow
Support	Patient Last Name *	
happort	Jones	Recent Assessments
/lyAccount	Gender: Patient identifies as *	Exam Exam Date Scores
	Female	Date Submitted
	Male	Caries 2/26/2019 Continue
	Patient Date of birth *	→
	2/3/1990	Import Patient Records From
	Phone Number	Another Dentist
	Notes	Clinical Access Code
		Import
		Import →
	Save	

Patient Engagement

If the provider selects an insurance company from the dropdown list, the provider has an opportunity to collect the patient's email address. This will allow the insurance company to send targeted messages to the patient based on the patient's risk and severity scores.

To enable this feature, you must check the box to "confirm that the patient wishes to receive additional information about their oral health," and enter the patient's email address twice:

Patient Engagement (Optional)

Entering the patient's e-mail address <u>and</u> checking the authorization box will allow your patient to receive oral wellness messaging that will increase their compliance with your recommended treatment plan.

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

Patient (or Parent's if under 18) Email Address

Confirm Email Address

Import Patient Records from another Dentist

This function allows a patient who has been assessed at another office to have their PreViser assessments imported into your OHIS records. For example, if a patient is assessed at a general dentist's office and then referred to a periodontist, the general dentist's assessment can be imported into the periodontist's OHIS records by entering the Clinical Access Code from the patient report generated by the general dentist into the periodontist's OHIS records. This report number can be found on the patient report here:

Home > Tom Franklyn		English 🗸 Correct Report Print	7
Tooth Disease Risk and Healt Exam Date: 7/2/2020 Submitted To: Previser Demo 7/2/2020 5:24 PM Prepared For: Tom Franklyn Prepared By: 603-555-5095 Home Care Report	- /	Provered by PREVISER Overview	
Your Clinical Access Code: 2CF3D379-59DF-4743-BBA			previserdental - Karen O'Connor (Log Off)
	PreViser Oral Health Inf	ormation Suite (OHIS) Patient Details	previserdemat - Naren O'Connor (<u>Log Utt</u>)
	Browse Patients	To deactivate patient, uncheck this box.	Start New Assessment
	Create Patient	Select Patient Insurance Company None / Other	$\begin{array}{l} \textbf{Comprehensive} \rightarrow \\ \textbf{Perio, Caries, and Oral Cancer} \end{array}$
	Unfinished Assessments	Please select the insurance company of the patient you are evaluating.	Perio →
	Options / Settings	Please enter the name as it appears on the dental insurance card. Patient First Name *	Caries →
The Clinical Access Code can be entered into the	Admin / Practice Reports	Brian Patient Last Name *	Oral Cancer →
	Support	Jones	Recent Assessments
patient details of the new provider's PreViser	MyAccount	Gender: Patient identifies as *	Exam Exam Date Scores
account as seen here:		 Female Male 	Caries 2/26/2019 Continue
		Patient Date of birth *	
		2/3/1990	Import Patient Records From
		Phone Number	Another Dentist
		Notes	Clinical Access Code
		<i>b</i>	Import →
		Save	

Recent Assessments

Once a patient has been assessed and you return to the patient details page for that person, a new section will appear on this page that shows all prior assessments. Example:

Recen	t Assess	ments	
Exam	Exam Date	Date Submitted	Scores
^C Caries	2/26/2019	2/26/2019	R:5 D:100
^C Perio	2/26/2019	2/26/2019	R:5 D:97 S:0
^C Oral Cancer	2/26/2019	2/26/2019	R:5
Oral Cancer	2/26/2019	2/26/2019	R:5
Perio	2/26/2019	2/26/2019	R:5 D:82 S:0
Caries	2/26/2019	2/26/2019	R:5 D:100

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

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

D = the restorative needs or periodontal disease severity scores;

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

Where **Continue** -> appears instead of scores, this will be an assessment that was not completed but <u>saved to complete</u> <u>later</u>. Clicking on a "Recent Assessment will return to the Oral Health Report corresponding to the assessment done at that date. **Note:** If you select to <u>Model This Patient</u>, the assessment will not appear in this section because modeled assessments are not recorded in the PreViser database and disappear once you close the modeled patient report.

Assessing a patient

Once a patient record has been created, you can perform a clinical PreViser assessment on that patient by clicking on which assessment you wish to perform.

Caries Assessment

If the Caries link is clicked, the following page displays:

F	PreViser Oral Health Information Suite (OHIS) previserdental - Karen O'Connor (Lo			(<u>Log_Off</u>)
	PREVISER	Create Caries Exam For <u>Brian Jones</u>		
	Browse Patients	Caries Exam Date		
	Create Patient	02/20/2019		
		Prepared By		
	Unfinished Assessments	MZ		
	Options / Settings	Responsible Clinician		
	Admin / Practice Reports	Please select the dentist responsible for this patient's care fr	om the list	
		Karen O'Connor •		
	Support	Next \rightarrow		
	MyAccount			
	<u>.</u>			

Caries Exam Date

This is the date the assessment was performed. The current date is the default date for this field. Generally this is going to be within a day or so of when the assessment data is entered. However, clinicians may wish to create a record of the patient's PreViser scores by entering data from prior examinations. You can adjust the exam date to reflect the prior dates with corresponding clinical information for those dates.

Note that if the exam date is more than 90 days in the past for a finished assessment, the Correct function is disabled.

Prepared By

This is the person who is doing the assessment, which always should be the clinician logged in to OHIS with their PIN.

Once these fields are populated, click Next.

To calculate the risk of caries as well as a numeric value for the restorative needs of the patient, you must provide a number of clinical observations. The information that needs to be provided changes as the age of the patient changes. This is because juveniles with deciduous teeth will have different risk factors to those of older patients. You will only need to answer those questions that pertain to the age of the patient being assessed. A comprehensive list of these questions follows:

Which teeth have most recently been in the mouth for at least 12 months?

Target tooth for patients up to age 18. Possible choices include Primary incisors; Primary molars; Permanent first molars; Permanent second molars; or Premolars.

For the most recently erupted tooth described above, what is its status?

Possible choices include Sound or sealed or only occlusal restorations; Have interproximal restorations; Have pits, fissures or other defects; Show early decalcification or are carious.

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

Possible answers include 36 or more months; 24 - 35 months; 12 - 23 months; or 1 or more teeth have had caries in the last 12 months. Primary caries is defined as the first carious lesion on a tooth surface, and not one beneath or at the margin of a restoration.

Liquids containing sugar are given in crib or bed by bottle or consumed during the day in a Sippy cup

Will appear for small children only. Possible responses include Yes; No.

Parent or caregiver is low socioeconomic status or health literacy

Will appear for small children only. Possible responses include Yes; No.

Mother or caregiver has been caries free for less than 12 months

Will appear for small children only. Possible responses include Yes; No.

1 or more teeth have an exposed root

Will appear for adults only. Possible answers include Yes; No.

Bacteria culture includes elevated MS and/or LB level

Possible answers include Yes; No; or No culture or test is available.

How many erupted teeth are present in the oral cavity?

The number of erupted teeth excludes third molars and is limited to a maximum of 28 teeth.

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

The number of erupted teeth excludes third molars and is limited to a maximum of 28 teeth. Implants are excluded from this count.

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

The number of natural teeth that require treatment because of caries or a defective restoration excludes third molars and is limited to the number of erupted teeth answered previously.

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

Possible answers include 0 (none); 1 or 2; 3 or more.

Clinical Conditions

Indicate by checking a box if any of these conditions exist:

- Oral hygiene improvement is needed
- Dry mouth or inadequate saliva flow

Treatment History and Considerations

Indicate by checking a box if any of the following is true about the patient:

- Dental care frequency is NOT as regular as advised
- Developmental problems or special health care needs
- Teeth have been extracted due to caries in last 6 months
- Fluoride varnish applied in last 6 months
- Has orthodontic appliance, space maintainer, or obturator
- Snacks or beverages containing sugar are consumed between meals 4 or more times per day
- Patient drinks fluoridated water
- Nonprescription fluoride products other than water are used
- Chlorhexidine used for at least 1 week per month for last 6 months (appears only for age 8 and older)
- Xylitol products have been used 4 times daily for last 6 months (appears only for age 8 and older)
- Calcium & phosphate toothpaste has been used during last 6 months (appears only for age 8 and older)
- Recreational drug/alcohol use (appears only for age 8 and older)
- Has had a major change in health (heart attack, stroke, etc.) (appears only for age 19 and older)

Report Options - Caries

When the clinical data and observations have been indicated, you have a few options on how you would like the data handled and how the report, if submitted, will appear.

Report Settings			
Treatment Options			
	Model This Patient	Save For Later	Finish

Treatment Options

If this box is checked, possible treatment options that will address the clinical conditions indicated will be available for viewing or printing. These will appear on page two of the patient report, for example:

PREVENTION - A	CTIVE INTERVENTION
	Prevention is based on risk and risk factors. This is treatment before disease is observed. Repair of the effects of disease rarely results in a condition as good as the original state. Preventing disease elimiinates tooth loss and reparative treatment.
COMMUNICATION	4
1	Dental treatment cannot keep you healthy. Your participation is very important. The most common patient behaviors that influence health and treatment success are oral hygiene, nutrition, and smoking. You may receive advice, including resources for you to change to health-promoting behaviors.
VISIT THE DENTIS	ST
	Symptoms are warning signs that frequently appear too late in the disease process for the simplest, most predictable, and least costly treatment. Regular visits to the dentist to detect disease in the early stages can prevent more complex and expensive treatment. Better still are regular visits for preventive care targeted to your risk factors.
ORAL HYGIENE	
	Oral Hygiene is of particular importance to you. You should learn improved methods of maintaining your teeth and gums.

Model This Patient

Selecting this option will submit the data you provided to the PreViser web service and return scores on a patient report. However, these scores will not be recorded <u>anywhere</u>, (i.e., saved for access at a future date). They will not be transmitted to an insurance company, nor will they appear in the patient record within the OHIS. The purpose of this function is to show the patient what their PreViser scores will be if they accept the treatment indicated and can be used to stimulate high levels of case acceptance.

Save For Later

This option will save the assessment data as you have entered it but will not submit the data to the PreViser web service. The saved assessment will be accessible in the <u>Unfinished Assessments</u> file available from the Home Page.

The saved assessment is also accessible within the Patient Details screen listed under "Recent Assessments," as seen in the graphic below. It will display with the exam date, no date submitted, and the word "continue," indicating the assessment has yet to be completed.

reViser Oral Health Inf	ormation Suite (OHIS)	previserdental - Karen O'Connor (Log Off
	Patient Details	
Browse Patients	To deactivate patient, uncheck this box.	Start New Assessment
	Active	
Create Patient	Select Patient Insurance Company	Comprehensive → Perio, Caries, and Oral Cancer
Unfinished Assessments	None / Other	Perio →
Options / Settings	Please enter the name as it appears on the dental insurance card. Patient First Name *	Caries \rightarrow
Admin / Practice Reports	Brian	Oral Cancer \rightarrow
Support	Patient Last Name * Jones	Recent Assessments
MyAccount	Gender: Patient identifies as *	Exam Exam Date Scores
	Female	Date Submitted
	Male	Caries 2/26/2019 Continue
	Patient Date of birth *	
	2/3/1990	Import Patient Records From
	Phone Number	Another Dentist
	Notes	Clinical Access Code
		Import →
	Save	

The "Save for Later" function can be used to prepare a patient assessment before the patient presents (see <u>Best</u> <u>Practices</u>). This can save time in a busy examination day as many of the data requested can be filled out in advance from the patient chart and saved to be completed during the examination.

Finish

If this option is selected, the data you have recorded will be submitted to the PreViser web service and a patient report will be returned including the Report Settings you have indicated.

The Caries/Restorative Patient Report

An example of the full Caries Patient Report can be found in Appendix A.

Report Header

The top of the report includes the name of the patient as well as other information and functionality:



Home

Clicking this link at the top of the report returns you to the PreViser Browse Patient List.

Patient Name

Clicking this link at the top of the report returns you to the patient details page for the patient being assessed.

English/Spanish translation toggle

Clicking on English will display the report in English. Clicking on Spanish will display the report in Spanish.

Correct Report

Clicking this choice returns you to the data collection form for the inputs that generated the report. You would use this if you think you made an error in entering the clinical observations. If you wish to correct a report, click this link and make whatever changes you need to, then click **Finish** to resubmit the assessment. A corrected report will replace the incorrect report when the data is being sent to an insurance company for oral health communication or benefit determination.

Print

Clicking this choice will direct the report to a printer.

Picture

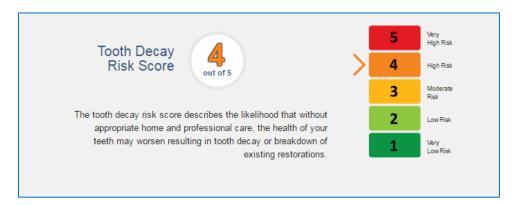
As described <u>above</u>, whatever image meeting the specifications described will be displayed on the patient report. Generally, this will be an image of the dentist, staff, or the office.

Clinical Access Code

This <u>code</u> can be used to share the report with another PreViser provider office.

Caries Risk

The PreViser patient reports are designed to give the patient clear scores for oral disease risk and severity. For caries, the report delivers a 1 to 5 score for caries risk based on the Caries Management by Risk Assessment (CAMBRA) approach to risk determination. This score is a reflection of the likelihood that the patient will experience new caries, or that existing restorations will become defective. The OHIS caries risk method expands the concept of CAMBRA, which predicts primary caries, to include secondary caries. Example:



In this example, the patient presents with a High risk of new defects and would then be a prime candidate for adult sealants, fluoride treatments and regular dental care. This score can be used to help the patient understand why professional oral care is so important.

Restorative Needs Score

This score is a reflection of the current status of the dentition on a 1 to 100 scale where:

- A score of 1 is a pristine dentition without carious lesions or any restorations
- A score between 2 and 9 is a sound dentition with no current defects but with an increasing percentage of the total dentition in a restored state as the score increases from 2 to 9
- A score between 10 and 100 represents a dentition with current active treatment needs, either due to a new carious lesion or because an existing restoration is defective. As the score becomes greater, a greater percentage of the total dentition is affected by a defect. A score of 100 would indicate that all teeth in the dentition have a defect.
 - Example: If a patient has only one tooth remaining, and that tooth had a lesion, the restorative needs score would be 100. When restored, the score would drop to 9.
 - Example: If a patient has a full dentition, and one tooth had a lesion the restorative needs score would be 10. When restored, the score would drop to 2.
 - Example: Verv 50-100 High Needs Restorative High 30-49 Needs Needs Score Moderate 10-29 Needs 2-9 Low Needs Your score indicates that you have some active tooth decay or some existing restorations that may be failing. Your dental professional can Very Low 1 advise you on the best strategy to correct this situation. Needs

In this example, the patient presents with Moderate Needs as indicated by a restorative needs score of 16. This equates to up to three defects that require therapeutic intervention.

In addition to a risk and restorative needs score, the caries patient report includes other elements of interest.

Tooth Forecast

This pictorial helps describe the overall prognosis for the patient *IF* they do not accept the preventive and therapeutic interventions recommended. For the patient with the risk and restorative needs scores shown above, the Tooth Forecast would display as:



continued

Tooth Health and You

This section gives the patient a quick summary of strategies that can help improve their oral health. Example:

Tooth Health and You.

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

- Talk to your dentist about managing the risk factors that may contribute to tooth decay
- You can help prevent tooth decay by following these tips:
- Brush twice a day with fluoride toothpaste
- Clean between your teeth daily with floss or an interdental cleaner

What Changed

This section of the report shows the patient what has happened to their risk and restorative needs scores over time. It is a powerful motivator for patient compliance as it shows what the impact of your professional care has been, or if the patient has not been compliant, what the negative impacts of that non-compliance may be. Example:

Tooth Deca	y Risk Score	Re	storative N	eeds Score
5 4 3 2		100 80 60 40 20		0

Treatment Options

As discussed above, this section of the report describes the preventive activities that may be helpful to improving the patient's oral health. It can be optionally printed by checking the box in the <u>Report Settings</u> section.

continued

Clinical Inputs

This final section of the report lists the data you provided that were used to calculate the report scores. It is not intended to be shared with the patient, so generally is not printed for the patient to take home, but can be used to understand why scores are calculated as they are. Example:

Cli	nical Access Code: FFHBPPYJMM Patient ID: 0cb3b3e4-da86-48ae-ad0f-5e4011	10f2bd
Caries Risk:	4 Restorative Need	5: 16
Visible Teeth:	26 Teeth with restoration	S: 14
Teeth with Caries:	2 Primary Caries	6: 0 (None)
1 or more teeth have an exposed root:	[] Yes How many months has the patient [X] No Incipient caries lesion? Primary caries of a incipient caries lesion? Primary caries is the first carious lesion on a too surface, not one beneath or at the margin of a restoration	n [X] 24-35 s [] 12-23 h] 1 or more teeth has had caries in e [] to carie to avoid a south of the south of t
Bacteria culture includes elevated MS and/or LB level?:	[] Yes Snacks or beverages containing [] No sugar are consumed between meals [X] No culture or test is available or more times per day	4 [X] No
Patient drinks fluoridated water:	[X] Yes Nonprescription or prescription [] No fluoride products other than water an user	e [X] No
Chlorhexidine used for at least 1 week per month for last 6 months :		
Calcium & phosphate toothpaste have been used during last 6 months:		2: []Yes [X]No
Has had a major change in health (heart attack, stroke, etc.) during the past 12 months:	[] Yes Oral hygiene improvement is needed [X] No	1: [X] Yes [] No
Dry mouth or inadequate saliva flow:	[X] Yes Dental care frequency is NOT a regular as advised	
Development problems or special health care needs:	[] Yes Teeth have been extracted due [X] No caries in last 36 months	0 []Yes 3: [X]No
Fluoride varnish applied in last 6 months:		e []Yes ^{r:} [X]No

Pre-loading values from prior assessment

After the first caries risk/restorative needs assessment has been done, the OHIS allows you to pre-load prior entered values from a previous assessment. This saves a great deal of time, as it allows you to only address clinical conditions that have changed since the last assessment. On recall, selecting the Caries assessment from the patient details page will display this screen:

Would you like to pre load values?
Last Previser Risk Assessment 5/31/2016
Load Last Assessment Values \rightarrow
No Thanks,
Start a New Caries Assessment \rightarrow

If you wish to pre-load prior examination values, just click the **Load Last Assessment Values** and then just update those observations that have changed. Alternately, you can begin an entirely new assessment by clicking "Start a New Caries Assessment."

Periodontal Disease Assessment

From the Patient Details page, you can perform a periodontal disease risk and severity assessment by clicking the **Perio** link:

s	tart New Assessment
	Comprehensive → Perio, Caries, and Oral Cancer
	Perio →
	Caries →
	Oral Cancer →

The following information is required to perform a periodontal disease risk and severity assessment:

Perio Exam Date

This is the date the assessment was performed. The current date is the default date for this field. Generally this is going to be within a day or so of when the assessment data is entered. However, clinicians may wish to create a record of the patient's PreViser scores by entering data from prior examinations. You can adjust the exam date to reflect the prior dates with corresponding clinical information for those dates.

Note that if the exam date is more than 90 days in the past for a finished assessment, the <u>Correct</u> function is disabled.

Prepared By

This is the person who is doing the assessment, which always should be the clinician logged in to OHIS with their PIN.

Smoking Status (cigarettes only)

If the patient never smoked, leave the default box checked. However if the patient currently smokes or has smoked in the past, check the appropriate boxes.

Smoking	If the patient smokes or did smoke, indicate quantity here	If the patient smokes, or did smoke, indicate how long here	If the patient quit, indicate how long ago here
Never Smoked	Smoke(d)	Smoke(d)	Quit
	 less than 10 cigs/day 10 or more cigs/day 	less than 10 years10 or more years	 less than 10 years ago 10 or more years ago

Question: Why aren't pipes, cigars, and smokeless tobacco included in this question?

Answer: PreViser only uses research data for weighting different risk factors. These other forms of tobacco have not yet been researched, so PreViser algorithms cannot properly weight them as risk factors.

Diabetic Status

If the patient is diabetic, and based on HbA1c %, indicate the current level of diabetic control.

Diabetic Status					
	Good Control	Fair Control	Poor Control		
HbA1c (%)	less than 6.5	6.5 - 7.5	greater than 7.5		
AM fasting plasma glucose (mg/dl)	90 - 104	105-130	greater than 130		
Not diabetic or unknown	Good	diabetic cor	ntrol 🔍 Fair	diabetic control	Poor diabetic control

General Observations

Indicate by checking a box if any of the following is true about the patient:

- Oral hygiene improvement is needed
- Scaling and root planing for any tooth has been done
- Furcation involvements exist
- Vertical bone lesions exist
- Dental care frequency is NOT regular as advised
- Periodontal surgery for pockets has been done
- Subgingival restorations are present
- Subgingival calculus detected by x-ray or exam

Deepest Pocket Per Sextant from the Gingival Margin to the Base of the Sulcus

One of the advantages of the PreViser OHIS is that it can calculate a scientifically valid periodontal severity description with sextant measurements for the deepest pocket per sextant rather than a full mouth description. As a result, most hygienists will perform a periodontal assessment to discover the deepest pocket. Once this clinical assessment is completed, enter the deepest pocket per sextant encountered. Four responses per sextant are possible:

- All pocket depths within the sextant are less than 5 mm
- At least one pocket within the sextant is 5 7 mm
- At least one pocket within the sextant is greater than 7 mm
- There are no teeth in the sextant

In addition, if bleeding occurs in the sextant on probing, note this by checking the appropriate box.

X-ray Distance from CEJ to Bone Crest

As is the case with pocket depths, only the greatest distance between the CEJ and the bone crest needs to be recorded. These measurements are made simply by a visual inspection of the bite wing x-rays. Five responses per sextant are possible:

• All distances within the sextant are less than 2 mm. This would visually appear to be normal bone height.

- At least one distance within the sextant is 2 4 mm. This would visually appear to be between normal and excessive bone loss.
- At least one distance within the sextant is greater than 4 mm. This would visually appear to be excessive bone loss.
- There are no teeth in the sextant.

In addition, for the anterior sextants if no x-ray is available, check the appropriate box. Severity scores can still be calculated without anterior measurements, although with a slight decrease in accuracy.

Report Options - Perio

Once the data input form for the perio risk assessment is completed, similar options to the Caries patient report can be made:

Treatment Options	
Include in report	
AAP, Surgical Emphasis	Do you wish to indicate the use of laser therapy?
	Model This Patient Save For Later Finish

Treatment Options

This is a selectable feature and if the box is checked suggested treatments will be included in the report. These options address specific clinical defects noted and are stack ranked as to effectiveness on a scale including **Generally Most Effective**; **May be Most Effective**; and **Less Likely to be Most Effective**. Example:

Active intervention you may need, unless stable and without inflammation:				
POCKETS LESS THAN 5	5MM	CONSIDER		
Les thas re Smm OI	Pockets that are less than 5mm deep can have the most thorough emoval of bacteria and calculus. However, all deep pockets were at ne time less than 5mm with the optimal probing depth being 3mm or ass.	 ⑦ Prophy or Maintenance ⊖ Chemo therapeutic 		

As noted on the report, these possible therapeutic recommendations will apply unless the patient is "**stable and without inflammation**." This exception is noted since a patient may have residual pocketing or bone loss but lack current inflammation, so active intervention is not needed in preference to maintenance procedures.

As in the case of the Caries assessment, <u>Home Care</u> is an enhancement.

AAP, Surgical Emphasis

If you are a periodontist, perform your own surgeries as a general dentist, or prefer to refer patients with periodontitis to a periodontist you may wish to check this box. The effect will be to elevate for consideration surgical options for therapy consistent with AAP guidelines.

Do you wish to indicate the use of laser therapy?

If lasers are part of your armamentarium, you can check this box and an additional message will appear in the Treatment Recommendations section. Example:

Our office uses the latest in laser technology to ensure the best outcome for our patients. The use of lasers may influence which therapy is the most suitable for you.

Model This Patient, Save for Later and Finish all function the same as they do for the Caries assessment report.

The Perio Patient Report

Similar to the Caries Report, the Perio patient Report offers the same features for <u>English/Spanish report translation</u>, <u>Correcting</u>, <u>Printing</u>, and <u>Image Insertion</u>. An example of the full Perio Patient Report can be found in <u>Appendix A</u>.

Periodontal Disease Risk

The PreViser patient reports are designed to give the patient clear scores for oral disease risk and severity. For periodontitis, the report delivers a <u>scientifically validated</u> 1 to 5 score for perio risk. This score is a reflection of the likelihood that the patient will develop periodontitis, or that existing perio severity will worsen. Example:



Periodontal Disease Severity

This score is a reflection of current perio severity on a 1 to 100 scale where:

- A score of 1 is perfectly healthy mouth without bleeding, pocketing or bone loss;
- A score between 2 and 3 indicates sextant bleeding on probing (gingivitis) but no pocketing or bone loss;
- A score between 4 10 indicates mild periodontitis;
- A score between 11 36 indicates moderate periodontitis;
- A score between 37 100 indicates severe periodontitis.

Within each of these ranges the condition varies between localized to generalized, and each increment in the score represents a measurable improvement or deterioration in periodontal status. Example:



Hint: A patient who has experienced periodontitis and bone loss won't grow back that bone, so their score can never return to a score of "1." However, without inflammation, the patient can be considered to be 'Stable' in the sense that they are not suffering from continuing deterioration or current inflammation.

Periodontal Disease Stability

This score is a reflection of how long the patient has been stable with unchanged scores. The purpose of this score is to "reward" and motivate patients whose risk and severity scores are constant by having their stability continue to climb. The score will always start at a baseline of zero, and continue to rise at a maximum of 10 points per year, not exceeding 100 points which represents 10 full years of periodontal stability. The graphic below indicates that the patients' periodontal status has remained stable for 4 years. If the patient was stable for 4.5 years, the patient's score would be 45. If the patient's periodontal status regresses, or the patient's exhibits periodontal bone loss, the gum health stability score would reset to zero. Example:



What changed?

As with the caries assessment report, this section shows how the patient's periodontal disease risk and severity have changed over time, and illustrate the value of compliance with recommended treatments, or the consequences of a lack of compliance. Example:



Similar to the Caries assessment report, the Oral Health Forecast includes a pictorial description of a Gum Forecast:

As well as a brief guide to how to improve one's periodontal health:

Your Gum Forecast



Stormy. You have already experienced deterioration in your oral health, but with conscientious professional and home care further damage can be minimized.

Your scores can help determine what professional treatments and preventive home care strategies may benefit you.

Gum Disease and You.

Knowing your gum health scores is the first step in improving, or maintaining the health of your gums. Here are other simple steps you can take:

- Talk to your dentist about managing any factors that contribute to elevated risk of disease.
- Ask your dentist how gum disease may impact other serious health ailments such as heart disease, Alzheimer's, strokes and diabetes.
- Take advantage of new products and technologies that may help you optimize your health through improved home care. A customized home care report is available that can make recommendations based on your gum health scores.

If <u>Treatment Options</u> were indicated to be included in <u>Report Settings</u> before the data was submitted to PreViser, those print, followed by the Clinical Inputs you provided that generated the scores shown on the report.

Oral Cancer Risk Assessment

From the Patient Details page, you can perform oral cancer risk assessment by clicking **Oral Cancer**:

Comprehensive → Perio, Caries, and Oral Cancer Perio →	Comprehensive →	
Caries -	Perio →	
	Caries →	

The following information is required to perform an oral cancer risk.

Oral Cancer Exam Date

This is the date the assessment was performed. The current date is the default date for this field. Generally this is going to be within a day or so of when the assessment data is entered. However, clinicians may wish to create a record of the patient's PreViser scores by entering data from prior examinations. You can adjust the exam date to reflect the prior dates with corresponding clinical information for those dates.

Note that if the exam date is more than 90 days in the past for a finished assessment, the Correct function is disabled.

Prepared By

This is the person who is doing the assessment. Usually this is a hygienist, but it can be any person responsible for the accuracy of the assessment data.

Has History of oral cancer

Check the box if this applies to the patient.

Cigarette Smoking

If the patient never smoked cigarettes, leave the default box checked. However if the patient currently smokes or has smoked in the past, check the appropriate boxes. If mistakenly you have selected that the patient is a smoker, or has quit when they have not yet quit, you can clear all fields by checking the "never smoked" box on the left.

Smoking	If the patient smokes or did smoke, indicate quantity here	If the patient smokes, or did smoke, indicate how long here	If the patient quit, indicate how long ago here	
Never Smoked	Smoke(d)	Smoke(d)	Quit	
	 less than 10 cigs/day 10 or more cigs/day 	 less than 10 years 10 or more years 	 less than 10 years ago 10 or more years ago 	

Pipes/Cigars

If the patient never smoked pipes or cigars, leave the default box checked. However if the patient currently smokes or has smoked pipes or cigars in the past, check the appropriate boxes, indicating how much they smoked, how long they smoked and if they have quit, how long ago they did quit.

Never Smoked	Smoke(d)	Smoke(d)	Quit
	 less than 1 cigar or pipes/day 1 or more cigar or pipes/day 	 less than 10 years 10 or more years 	 less than 10 years ago 10 or more years ago

Smokeless (Chewing) Tobacco

If the patient never used smokeless tobacco, leave the default box checked. However if the patient currently uses or has used smokeless tobacco in the past, check the appropriate boxes, indicating how much they used, how long they used and if they have quit, how long ago they did quit.

Never Used	Use	Use	Quit
	 Occasionally Use Daily Use 		less than 10 years ago10 or more years ago

Alcohol Use (Average number of drinks consumed in the past year)

Using the definition of what constitutes a "drink" below, indicate whether the patient is a non-drinker or the number of drinks per day consumed.

	Note: 1 drink equals			
Beer	16 ounces or 1 pint	5% alcohol		
Wine	6 ounces or 175 milliliters	12% alcohol		
Spirits	1.5 ounces or 45 milliliters	40% alcohol		
	lana			Less than 1 drink nor day
	lone			Less than 1 drink per day
			ļ	1 drink per day

Report Settings

If you wish to have **Treatment Options** included in the report, check that box. <u>Model This Patient</u>, <u>Save For Later</u> and <u>Finish</u> all function the same as with the caries or perio assessments.

The Oral Cancer Risk Report

Similar to the Caries and Perio Reports, the Oral Cancer patient Report offers the same features for <u>English/Spanish</u> <u>report translation</u>, <u>Correcting</u>, <u>Printing</u>, and <u>Image Insertion</u>. An example of the full Oral Cancer Patient Report can be found in <u>Appendix A</u>.

Oral (Mouth) Cancer Disease Risk

The PreViser patient reports are designed to give the patient clear scores for oral disease risk and severity. For oral cancer, the report delivers a risk score from 1 to 5. This score is a reflection of the possibility that the patient will experience an oral cancer lesion. Example:



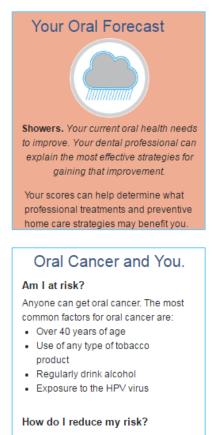
Note: Because a person has elevated risk for mouth cancer does not mean they are likely to experience this terrible, if infrequent disease. Rather it means that they have exhibited risk factors that increase the possibility of developing the disease. It is helpful to explain to a patient that just because your home is at elevated risk for catching on fire due to the proximity of flammable brush or trees surrounding the home it doesn't mean the house will catch on fire - just that the risk factors increase that possibility. The oral (mouth) cancer risk score is designed to encourage the patient to reduce the risk factors associated with the disease, like the use of smokeless tobacco or alcohol.

The oral (mouth) cancer report includes a clear explanation of what oral cancer is and how important your services can be in the early detection of the disease. Example:

What is oral cancer?
Oral cancer is a cancer that develops in any part of your mouth. This includes your tongue, under your tongue, your gums, your lips, the roof of your mouth, and inside your cheeks.
Finding oral cancer saves lives: Mouth cancer can be cured if detected early, when it has just started to develop. Treatment for the early stages may not require surgery, although if the disease spreads, surgery is likely to be necessary.
 The early signs of oral cancer A red or white patch that lasts for more than three weeks An ulcer that lasts for more than three weeks A lump or swelling that lasts for more than three weeks
Many of these early signs might seem similar to normal problems in your mouth. However, normal problems will clear up by themselves in two or three weeks. Problems that last for three weeks or longer should be brought to the attention of your dentist.
Thanks to King College London and Dr. Crispian Scully for their contribution to the content of this report. Note: ALL types of "screening" can produce false negatives/positives and NO algorithms are 100% effective.

As is the case with Caries and Perio, this report also shows a pictorial representation of an Oral Forecast. Example:

Finally, a brief discussion of Oral Cancer and You is provided. Example:



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

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

Comprehensive Assessment

The comprehensive assessment includes the questions from all three assessments (caries, perio, and oral cancer). It would typically be done as the first PreViser assessment on a patient; or when a patient first presents for services; or on request from an insurer. It combines the caries, perio and oral cancer assessments into one document, and while it takes time to complete, provides a comprehensive guide to the complete treatment plan a new or existing patient will benefit from. On submittal, the comprehensive report is returned in the form shown in <u>Appendix A</u> of this document.

Unfinished Assessments

Accessed through the left hand navigation bar, the **Unfinished Assessments** link give access to all assessments you elected to <u>Save For Later</u> rather than <u>Modeling</u> or <u>Finishing</u> the assessment. Example:



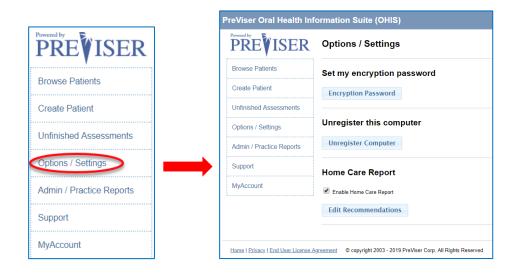
Accessed through the left hand navigation bar, the **Unfinished Assessments** link give access to all assessments you elected to <u>Save For Later</u> rather than <u>Modeling</u> or <u>Finishing</u> the assessment. Example:

Unfinished Assessments				
Exam Date	Patient	Prepared By	Туре	
6/1/2016	Fred Test	theresa	Caries	Delete

By clicking on the assessment line, the data input page for the unfinished assessment will open and you can then provide the missing information prior to submitting the assessment by clicking **Finish**. Alternately, you can delete the assessment by clicking the **Delete** button.

Options / Settings

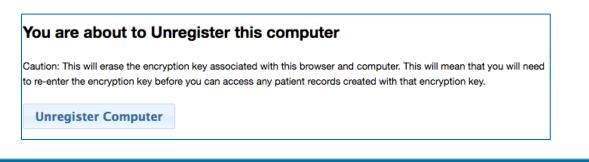
Options / Settings provides three functions: <u>setting/retrieving your encryption password</u>, unregistering this computer, and for Primary Users/Admins, editing recommendations within the Home Care Report.



Unregister Computer

This function allows you to remove the stored encryption key from local browser memory storage. This feature is rarely used, but may be useful when one wishes to access another username's PreViser account from a computer already registered with an encryption key associated with a different username. If PreViser manages your key on your behalf, there is no need to unregister your computer.

If you wish to remove the store key, click the **Unregister Computer** link, then confirm by clicking the link below:



Warning: Do not unregister the computer unless you know what the key being removed is. You can access that key as described in the previous section.

Home Care Report

The professional recommendation for self-care and home care products is a critical component in optimizing patient oral health outcomes. To assist OHIS users systematize their home care recommendations for these products and instructions on how to use these products, a Home Care Report option is automatically enabled for all users. However, the Home Care Report options can be changed only by Admin OHIS users. To view and edit the default recommendations, click on edit recommendations.

PreViser Oral Health Information Suite (OHIS)				
PREVISER	Options / Settings			
Browse Patients	Set my encryption password			
Create Patient	Encryption Password			
Unfinished Assessments				
Options / Settings	Unregister this computer			
Admin / Practice Reports	Unregister Computer			
Support	Home Care Report			
MyAccount	Enable Home Care Report			
1	Edit Recommendations			
Home Privacy End User License A	greement © copyright 2003 - 2019 PreViser Corp. All Rights Reserved.			

You have the option of making product recommendations for six risk categories – caries risk 1 or 2 (very low and low), caries risk 3 (moderate), caries risk 4 or 5 (high and very high), perio risk 1 or 2 (very low and low), perio risk 3 (moderate), and perio risk 4 or 5 (high and very high). Within these risk categories there are seven different product

categories that you can optionally suggest as beneficial for a given risk category – Toothpaste, Mouth Rinse, Manual Tooth Brush, Power Tooth Brush, Interdental Device, Prescription Toothpaste and Prescription Mouth Rinse.

For the initial launch of the Home Care Report, we collaborated with Colgate, who provided images and text to go along with the products that they believe you might consider for a given risk and product category. However, you are free to recommend any alternative product you think best for your patients. When you click on Edit Recommendations, you will see this screen:

Caries 1,2	Caries 3	Caries 4,5	Perio 1,2	Perio 3	Perio 4,5	
Edit home care recommendations for Caries Risk 1,2						
Toothpast	e			Colgate I	Recommendation	n: YES
	Nam	e: COLGATE®	• TOTAL® CLE	AN MINT TO	OTHPASTE	
Colgate	Descriptio		ms for 12 hou Tartar Build-U			-
			Remove	Change Re	commendatio	on
Mouth Rin	se			Colgate I	Recommendation	n: YES
	Nam		® TOTAL®ADV. IOUTHWASH	ANCED PRO-		
Description: Colgate® Total® Pro-Shield™ is an alcohol fre mouthwash that kills 99% of germs on contac offers 12-hour germ protection with continue daily use, even after eating and drinking. It significantly reduces plaque, helps prevent g and freshens breath. Peppermint Blast® Flavo			on contact and continued twi king. It revent gingivi	ce		

At the top of this page, you'll see the different risk categories arranged as tabs on the page. Within each risk category are the seven product categories that allow you to manage in one of four ways:

- First, you can default to the recommendation Colgate has made for the products they believe are appropriate for the risk category.
- Second, you can remove a recommendation for a product category altogether by clicking **Remove**.
- Third, you can alter the recommendation for a risk and product category by clicking **Change Recommendation**.
- Fourth, if a product category has no default recommendation, you can add one by clicking Add.

Changing or Adding Product Recommendations

If you prefer to recommend another or add a product for a risk category and click **Change Recommendation** you will see this screen:

Here you can enter the name of the product you prefer over the default recommendation, and provide whatever text you think appropriate. If you click **Return to List**, your edits will not be saved and you will return to the prior screen. If you click **Update Product Recommendation**, your edits will be saved, and you will see this screen:

If you change your mind on wording, or wish to revert to the original default product recommendation, you can either makes changes to your recommendation, or click the **Use Original Recommendation** box.

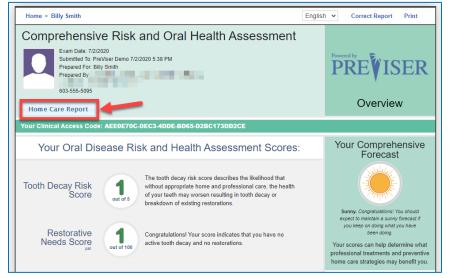
You can set up your recommendations easily for a product category by clicking on the tabs to scroll through the different risk categories, or

Caries 1,2 Caries 3 Caries 4,5 Perio 1,2 Perio 3 Perio 4,5 Foothpaste recommendation for Caries Risk 1,2 Provider Recommended Product Product Name	louth Rir
Toothpaste recommendation for Caries Risk 1,2 Provider Recommended Product Product Name	
Provider Recommended Product Product Name	
Product Name	
Baking Soda	
We prefer baking soda for our patients at low risk of tooth decay. It is inexpens and has just the right amount of abrasion for optimal cleaning.	ive,
Return to List Update Product Recommend	lation
Rent Come Descent Descent and discussion of R	eturn to l
ome care Report Recommendations	uth Rins
Caries 1,2 Caries 3 Caries 4,5 Perio 1,2 Perio 3 Perio 4,5	
Toothpaste recommendation for Caries Risk 1,2	
Provider Recommended Product	
Product Name	
Baking Soda	
We prefer baking soda for our patients at low risk of tooth decay. It is inexpensiv and has just the right amount of abrasion for optimal cleaning.	иe,
	//
Return to List Update Product Recommenda	ition
Original Product Partner Recommendation	
COLGATE® TOTAL® CLEAN MINT Use Original Recommenda TOOTHPASTE	ition
Fights germs for 12 hours. Helps prevent Plaque, Gingivitis, Tartar Build-Up, Cavit and Bad Breath.	ies

click on the highlighted category link in the upper right hand corner to scroll through the product categories for a given risk category.

Generating the Home Care Report

When you are finished setting up the products you wish to recommend for each risk category, you can proceed to generate Home Care Reports for your patients as part of their OHIS assessment. You will see a new button in the header of the report:



When you click on this new link, the following screen will display:

Home > TestFirst TestLast > Comprehensive Report > Home Care Report	
Home Care Report Recommendations Exam Date: 8/22/2016 Date Submitted: 8/22/2016 Prepared for: TestFirst TestLast	Perio Risk: 3 Caries Risk: 5
Toothpaste AM: COLGATE® TOTAL® CLEAN MINT TOOTHPASTE	Alternate Toothpaste
Mouth Rinse No Recommendation	Recommend Mouth Rinse v
Manual Brush COLGATE® 360® TOOTHBRUSH	Alternate Manual Brush
Prescription Rinse No Recommendation	Recommend Prescription Rinse •
Prescription Toothpaste PM: 5000 PPM RX TOOTHPASTE	Alternate Prescription Toothpaste 🔹
Additional Notes: Please make sure to schedule your next examination within the next 3 months.	Generate Report

PreViser OHIS User Documentation

In this example, the patient presents with perio risk of 3 and caries risk of 5 as a result of a comprehensive assessment that generates scores for caries, periodontal disease and oral cancer. Recommendations that are automatically made when both perio and caries risk scores are present use the following logic:

Whatever the highest risk is, use the recommendations for that risk category. If both perio and caries risk scores are the same value, use the caries risk product recommendations.

On this "intermediary screen" you have a couple of options. First, you can change the product being recommended from the matrix you set up by selecting a different product from the drop down list:

Alternate Toothpaste	v
Alternate Toothpaste	
Baking Soda - Caries Risk 1,2	2
COLGATE® TOTAL® CLEAN	MINT TOOTHPASTE - Caries Risk 3
COLGATE® TOTAL® CLEAN	MINT TOOTHPASTE - Perio Risk 1,2
COLGATE® TOTAL® CLEAN	MINT TOOTHPASTE - Perio Risk 3
COLGATE® TOTAL® CLEAN	MINT TOOTHPASTE - Perio Risk 4,5
Not Recommended	

You can also add notes that will appear on the Home Care Report in the "Additional Notes" section. This page lets you adjust the recommendations based on individual patient characteristics that warrant changes from your standard set of recommendations.

Once you are satisfied with your recommendations, click **Generate Report**, and your report with any additional comments will display and can be printed and given to the patient:

Home > TestFirst TestLast > Comprehe	Home > TestFirst TestLast > Comprehensive Report > Home Care Report Print				
Our recommendations for appropriate home care products					
Exam Date: 8/22/2016 Perio Risk: 3 Date Submitted: 8/22/2016 Perio Risk: 3 Prepared For: TestFirst TestLast Prepared By: Shane, Test Practice Carries Risk: 4 123 Any St. USA Test City, WA 98273 360-123-9877					
Our home care product recommendations are generally based on the highest risk score calculated for you based on your examination. Our experience is that the following products will likely help you maintain the best oral health possible and avoid future disease.					
	Fights germs for 12 hours. Helps prevent Plaque, Gingivitis, Tartar Build-Up, Cavities and Bad Breath.				
	Revolutionizes oral care by cleaning the teeth, tongue, cheeks and gums and removes more Bacteria. Multi-level bristles to remove more plaque in between teeth. Raised cleaning tip cleans hard-to-reach places.				
PM: 5000 PPM RX TOOTHPASTE	Because of one or more risk factors your teeth are more vulnerable to tooth decay and cavities. To help protect against further decay, brushing with a prescription level fluoride toothpaste daily helps strengthen tooth ename to portect against the effects of decay causing acids. Using a 5000ppm toothpaste as prescribed could benefit your oral health by: Fewer areas of decay, Stronger teeth, and Fewer cavities, reduced fillings.	ľ			
Please make sure to schedule your next examination within the next 3 months.					
The products identified in this report have been selected or identified by your treating dentist and/or hygienist based on his or her clinical judgment, your PreViser scores, and your statements to your treating dentist or hygienist. These product recommendations are not prescriptions, nor are they intended to establish a standard of care. They are not a substitute for professional judgment, advice, diagnosis, or treatment. Neither PreViser Corporation nor the product manufacturer(s) make any warranty, express or implied, as to the suitability, availability, or clinical efficacy of the recommended products.					

To disable the Home Care Report, select **Options and Settings**, and uncheck the **Enable Home Care Report** checkbox:

reViser Oral Health Information Suite (OHIS)		
	Options / Settings	
Browse Patients	Set my encryption password	
Create Patient	Encryption Password	
Unfinished Assessments		
Options / Settings	Unregister this computer	
Admin / Practice Reports	Unregister Computer	
Support	Home Care Report	
MyAccount	Enable Home Care Report	
/	Edit Recommendations	
Home Privacy End User License A	greement © copyright 2003 - 2019 PreViser Corp. All Rights Reserved.	

Admin / Practice Reports

The options of "Patient by Risk Report" will generate a list of patients by risk and disease severity scores from completed assessments of your patients within your Browse Patient list.

In compliance with HIPAA system logging requirements, the "Request Activity Log" is a means to request an activity log via email. For more information on HIPAA system logging requirements, please go to: <u>https://www.hhs.gov/hipaa/for-professionals/compliance-enforcement/audit/protocol/index.html</u>.

Note: Activity logs are extremely large, and should only be requested in response to a requirement from the Office of Civil Rights Enforcement.

F	PreViser Oral Health Information Suite (OHIS)			
		Practice Reports		
	Browse Patients	Patient By Risk Report - Perio		
	Create Patient	Patient By Risk Report - Caries		
	Unfinished Assessments	Patient By Risk Report - Oral Cancer		
	Options / Settings	Request Activity Log. Allow 3 business days.		
	Admin / Practice Reports			
	Support			
	MyAccount			

Support

PREVISER
Browse Patients
Create Patient
Unfinished Assessments
Options / Settings
Admin / Practice Reports
Support
MyAccount

Clicking on Support takes you to the PreViser Support website.

			R	eturn to PreViser.com
PREVISER	GETTING STARTED WEBINARS E	DOCUMENTATION	TRAINER RESOURCES	CONTACT US
GETTING STARTED Find everything you need to get started with PreViser	WEBINARS Schedule atraining session for you with a PreViser expert or watch these videos to see how easy it is to use P in your dental practice.	e how-to n	DOCUMENTAT Discover FAGs, find user guide nore about the science behind technology.	s, and learn
READ MORE	READ MORE		READ MORE	
TRAINER RESOURCES Are you a trainer who is helping other people learn how to use PreViser? Use these resources to train others.	CONTACT US Create a support ticket, schedule a v or get live support.		PREVISER.CCC View product information and about our company	
READ MORE	READ MORE		READ MORE	
OUICK LINKS: REQUEST SUPPORT	CREATE/MANAGE ACCOUNT	CLINICAL SUITE V5		

Special Data Fields by Insurer

A number of insurance carriers are using PreViser scores to power their oral wellness programs. For patients insured by these carriers, additional data fields are required:

- **Subscriber ID:** This is the number that identifies the patient. It can be found on the patient's dental insurance card.
- **Relationship of the Patient to the subscriber:** The subscriber is generally an employee of a company. The options for this field are:
 - Self the patient is the subscriber
 - **Spouse/Partner** the patient is the spouse or life partner of the subscriber
 - **Dependent** the patient is a dependent of the patient.

PreViser Oral Health Information Suite (OHIS)				
PREVISER	Patient Details			
Browse Patients	To deactivate patient, uncheck this box.			
Create Patient	Active Select Patient Insurance Company			
Unfinished Assessments	Please select the insurance company of the patient you are evaluating.			
Options / Settings	Subscriber Number			
Admin / Practice Reports	Group Number			
Support	Relationship Code ▼			
	Patient Engagement			
MyAccount	Entering the patient's e-mail address <u>and</u> checking the authorization box will allow your patient to receive oral wellness messaging that will increase their compliance with your recommended treatment plan.			
	I have confirmed that this patient wishes to receive additional information about their oral health.			
	Patient (or Parent's if under 18) Email Address *			
	Confirm Email Address *			

- **Patient engagement:** Confirmation the patient wishes to receive emailed oral health information from their insurance carrier. Examples of such information would be the availability of enhanced benefits that follow their PreViser scores; information on the importance of good oral health for the diabetic patient; etc. It is strongly recommended that the patient accept this information, as it is an important part of elevating their appreciation for the oral health services you provide.
- Email address of the patient (or parent/guardian): This is the email address that will receive oral health messaging.

Return of Benefits

Some insurance carriers offer a return of benefits after an assessment has been completed for a verified patient. This feature offers the dental office and clinician chair side return of benefits which includes maximum allowance, remaining allowance, limitations and enhanced benefits if a patient qualifies for additional benefits based on the patient's OHIS scores, to name a few.

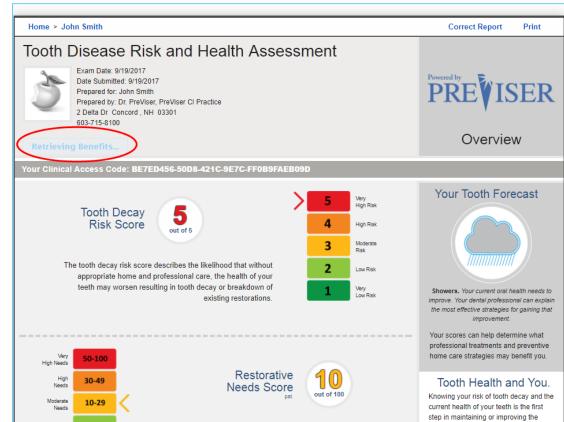
Check Benefits

After the OHIS has been "finished," the OHIS report will display with a "Check Benefits" button for a verified patient. This button will not display for a patient with no insurance, or a patient who has an insurance carrier who does not support this feature. In order to access the benefits of the patient, the user must click the "Check Benefits" button at the time the report is generated. The "Check Benefits" button will not display on previous assessment reports.



Retrieving Benefits

After the "Check Benefits" button is clicked, the button changes to "Retrieving Benefits" as seen in the graphic at right:



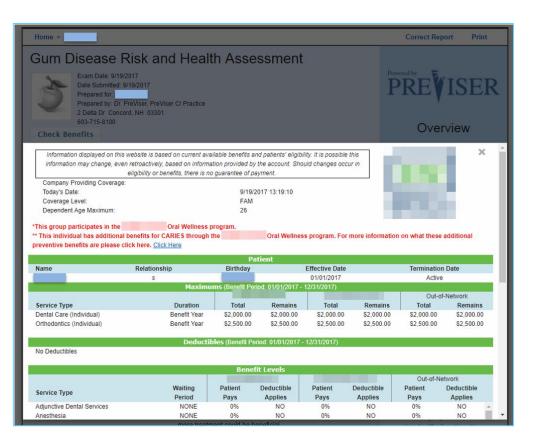
that you have some active tooth doo

Benefit Return Display:

When you click "Check Benefits," the current benefits of the verified patient display, as seen in the graphic to the right.

The return of benefits can only be accessed at the time the finished report has been completed and the OHIS report displays.

In other words, you cannot access the return of benefits on any saved reports, because the benefits may not be current.



Additional Enhanced Benefits Information:

After the benefit return displays, you also have the option to expand on the enhanced benefit plan design for the patient, by clicking "Click Here," as seen in the graphic:

The graphic at right displays after clicking on "Click Here" in the above graphic.

This provides PreViser users with more information about the Enhanced Benefit plan design tailored to that specific patient.

Home > John Smith						Correct Repo	rt Print
Home > John Smith							
footh Disease	Risk and He	ealth Asse	essment	t			
Exam Date: 9/19					Pos	ered by	
Date Submitted:					P	REV	ISE
Prepared for: Jol Prepared by: Dr	nn Smith PreViser, PreViser CI Practi	CP .					
2 Delta Dr Conc							
603-715-8100						Over	/iew
Check Benefits						0,01	
Information displayed on this							×
information may change, eve	en retroactively, based on inf eligibility or benefits, there			uld changes occur	in		
Company Providing Coverage							
Today's Date: Coverage Level:		9/19/20 FAM	017 13:35:44				
Dependent Age Maximum:		26					
This group participates in the	Oral Walls	ess program.					
* This individual has additiona			Oral Wellnes	s program. For m	ore information	on what these a	dditional
reventive benefits are please	click here Click Here						
			ient				
Name John Smith	Relationship s	Birthday 4/13/1971		Effective Date 01/01/2017		Termination Active	Date
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Submitted to Insurer Status:

This reports the exact time and date the assessment was submitted to the insurance company.

Home > Tom Franklyn	English	~	Correct Report	Print
Tooth Disease Risk and Health Assessment Exam Date: 7/2/2020 Submitted To: PreViser Demo 7/2/2020 5:24 PM Prepared For: Tom Franklyn Prepared By: 603-555-5095		Pow	REVIS	
Home Care Report Your Clinical Access Code: 2CF3D379-59DF-4743-BBA1-E3A27899DF2C			Overview	/

If no insurance for that patient is selected, it should state "no insurer selected."

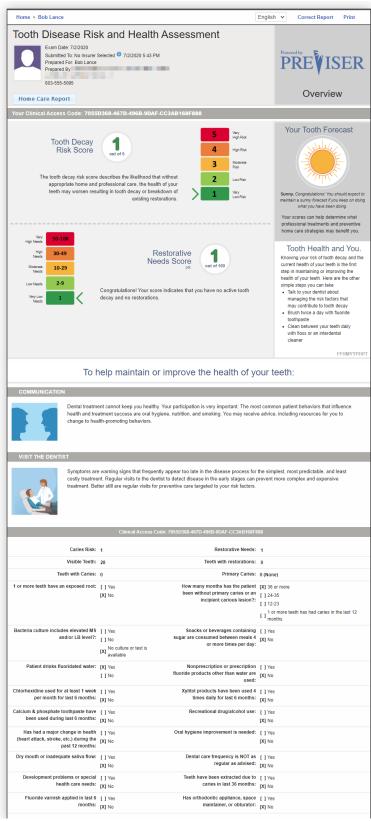
Home > Bob Lance	nglish	~	Correct Re	port	Print
Tooth Disease Risk and Health Assessment Exam Date: 7/2/2020 Submitted To: No Insurer Selected T/2/2020 5:43 PM Prepared For: Bob Lance Prepared By: 603-555-5095 Home Care Report		Powere	ed by REV Over		
Your Clinical Access Code: 7055D368-467D-496B-9DAF-CC3AB168F888					

APPENDIX A - REPORTS

Perio



Caries



PreViser OHIS User Documentation

Oral Cancer



Comprehensive

