



This guide describes the **PreViser® MyAccount** including browser requirements and element descriptions.

For further information, contact:
help@previser.com
P: 888.854.0007

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HIPAA / HITECH

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Version History

Revision Level	Date	Description
3.0	January 22, 2019	Original
3.1	March 12, 2019	Updated screenshots & 'inactive' wording.
3.2	February 21, 2020	From OHIS to Clinical Suite: Updated screenshots and wording.
3.3	April, 2020	Added BAA information
3.4	May, 2020	Updated screenshots
3.5	February, 2021	Format Update

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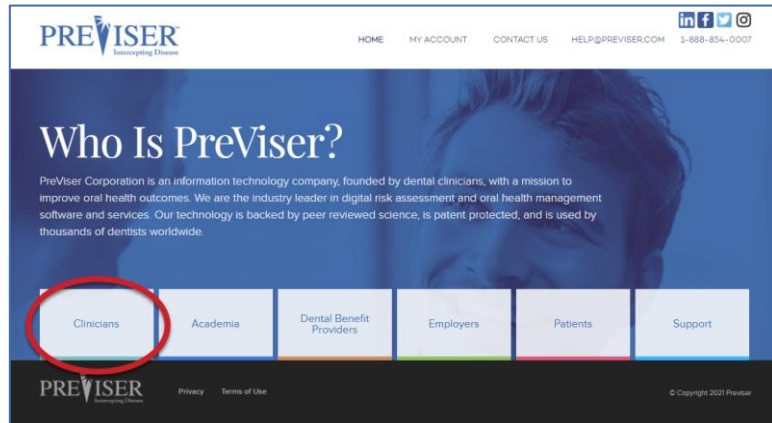
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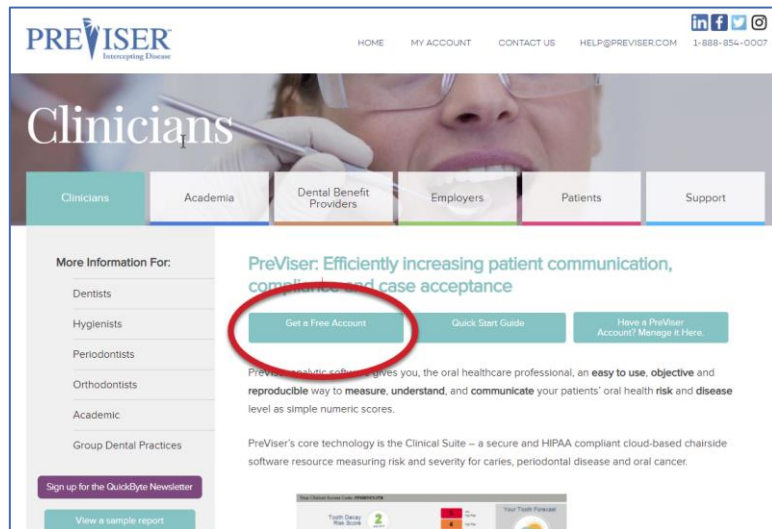
REGISTRATION

Start on the PreViser website:
<https://www.previser.com/>.

Then click **Clinicians**.

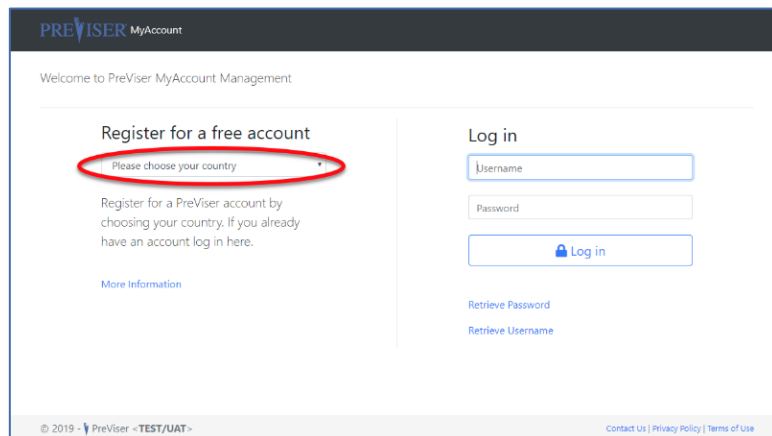


Click **Get a free Account**.



A page asking you to choose your country displays.

Select the country in which you are located from then choose your country from the drop-down menu.



continued

The PreViser Registration - Search for your provider record page displays next.

Note: One registration per practice location.

Type in:
Last Name,

Phone Number (use the phone number on file with dental insurance companies or the practice phone number),

and/or

Postal Code

Click **Find My Practice**.

If you were not able to find your practice, click **Continue** at the bottom of the page to display the PreViser Registration page and set up your account manually.

To complete manual registration, you will need both the state license number and NPI for the provider.

The screenshot shows the 'PreViser MyAccount' header. Below it is the 'PreViser Registration' title. The main heading is 'Search for your provider record'. There are three instructions: 'To simplify your registration process, we'll try to locate your information', 'Note: To complete this registration you will need your state license number.', and 'Use the Phone Number on file with dental insurance companies, or your practice phone number.' Another note says 'Note: One registration per practice location.' The form has three input fields: 'Last Name:', 'Phone Number:', and 'Postal Code:'. A blue 'Find My Practice' button is at the bottom.

This screenshot shows the same registration page but with search results. The 'Last Name' field contains 'Slocum02' and the 'Postal Code' field contains '03046'. Below the 'Find My Practice' button, it says 'There were no search results that matched your criteria.' At the bottom, there is a message: 'If you could not find your practice information, please refine your search and try again, or click continue to set up your account manually.' A red circle highlights the 'Continue' button. The footer includes '© 2021 - PreViser' and links for 'Contact Us | Privacy Policy | Terms of Use'.

continued

Fill in the fields, red asterisks indicate required fields.

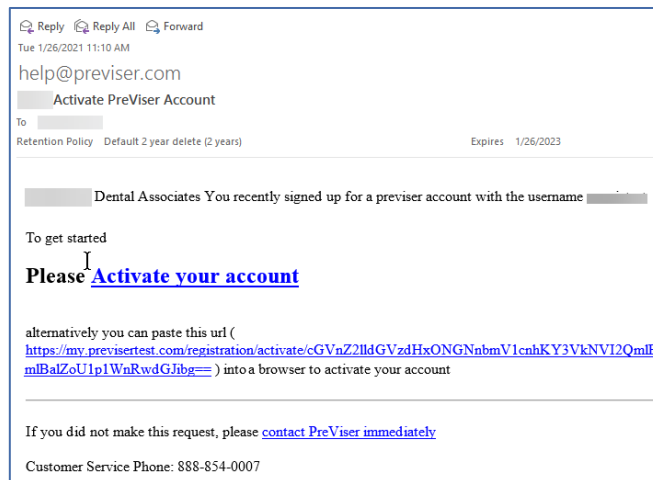
Add additional clinicians/users and be sure to check the [User has admin privileges](#) check box for each as appropriate.

Check the box to show you read and agree with the **End User License Agreement**.

Click **Complete Registration**.

You should shortly receive a verification containing your next step.

Click the link to complete your account activation.

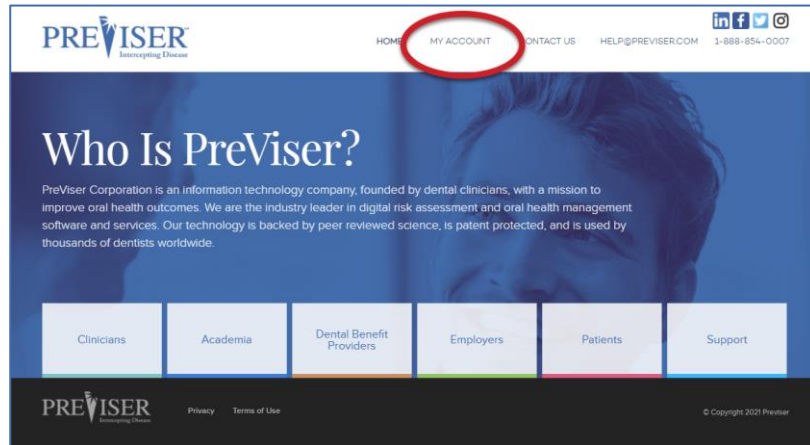


LOGGING IN

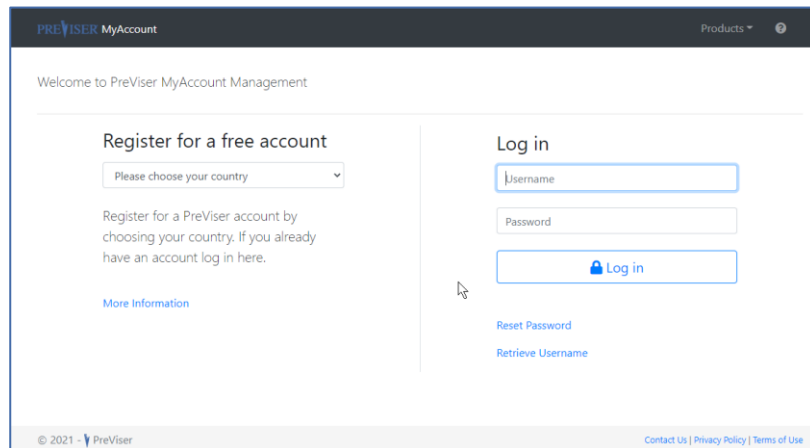
When logging in, you can start at the PreViser website: <https://www.previser.com/>, and click **My Account**

or type

<https://my.previser.com> into the address bar.

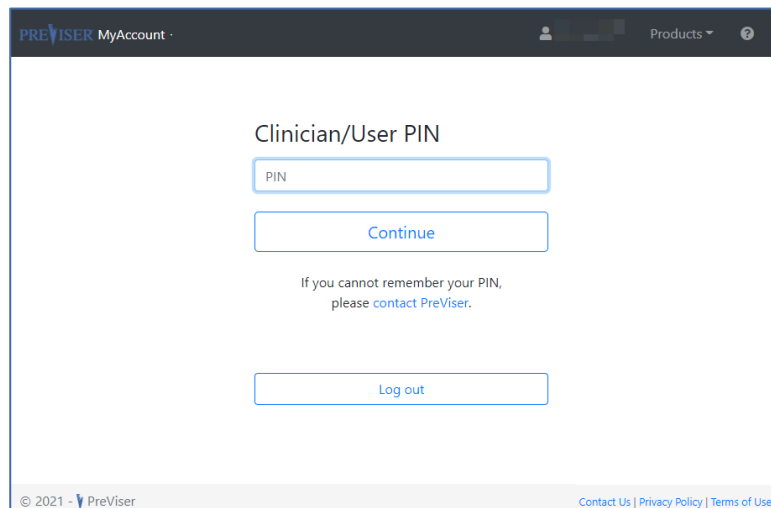


Log into PreViser’s MyAccount with your username and password that was created during registration.



Type in the PIN number that you created when first registering for the account. This is a 5-digit number.

Click **Continue** to be logged in.



BUSINESS ASSOCIATE AGREEMENT

CONFIRM NETWORK PARTICIPATION

When new account providers log in for the first time, a page requesting that you *either* confirm your participation in a network listed in the drop-down field *or* electronically sign a HIPAA Business Associate Agreement (BAA) with PreViser.

* Be sure the person signing on behalf of the practice has the authority to do so.*

Check the box.

Select the insurer from the drop-down.

Type your name.

Click **Submit Confirmation**.

Note: If your practice is not in-network with any of the insurers listed in the drop-down, click **then go here**.

If the person logging on does not have authority, this part can be signed later. Simply select the **Remind Me Later** option.

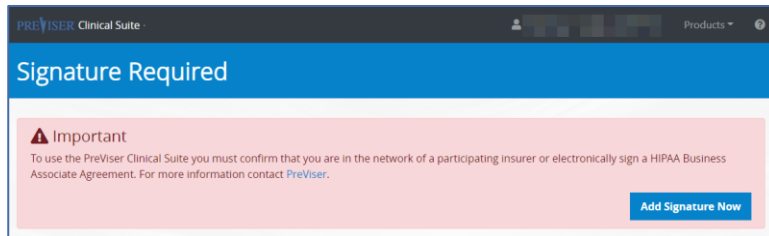
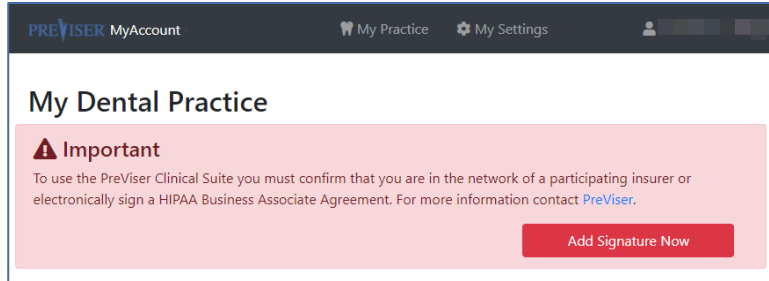
The screenshot shows the 'My Dental Practice' page in the PreViser MyAccount system. The page title is 'My Dental Practice' with an 'Add Signature' icon. The main heading is 'Confirm Your Network Participation'. Below this, there is a thank-you message and a link to 'PreViser'. A checkbox is present with the text: 'By checking this box, I confirm that my practice is in-network with the insurer indicated below.' Below the checkbox is a dropdown menu labeled 'In-Network With:' with the placeholder text 'Select an Insurer'. There is also a text input field labeled 'Your Name:'. At the bottom of the form, there are two buttons: 'Remind Me Later' and 'Submit Confirmation'. The footer of the page includes '© 2021 - PreViser' and links for 'Contact Us | Privacy Policy | Terms of Use'.

The screenshot shows the 'My Dental Practice' page in the PreViser MyAccount system. The page title is 'My Dental Practice' with an 'Add Signature' icon. The main heading is 'HIPAA Business Associate Agreement'. Below this, there is a thank-you message and a link to 'PreViser'. A checkbox is checked with the text: 'By checking this box, I confirm that I have read and agree with the Business Associate Agreement below. I also confirm that I have the authority to sign this document on behalf of my organization.' Below the checkbox is a PDF icon and the text 'Business Associate Agreement'. There is also a text input field labeled 'Your Name:'. At the bottom of the form, there are two buttons: 'Remind Me Later' and 'Submit Signature'. The footer of the page includes '© 2021 - PreViser' and links for 'Contact Us | Privacy Policy | Terms of Use'.

continued

Your clinicians will not have access to the Clinical Suite assessment tool until the BAA is signed.

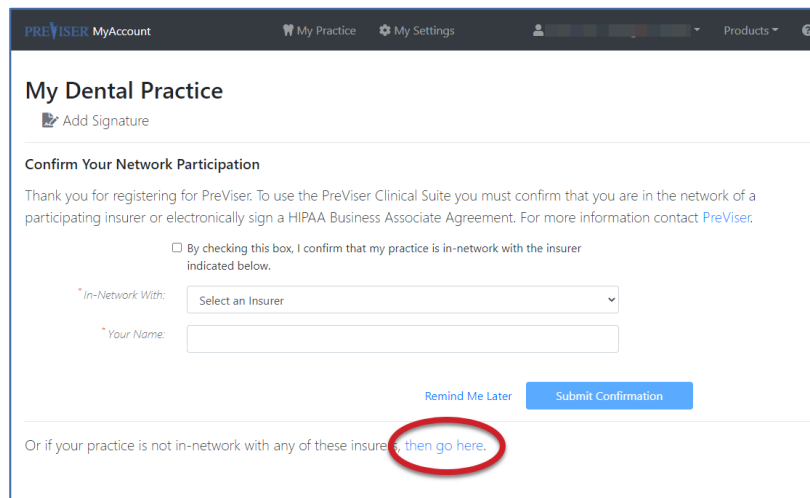
These notices will display until a BAA signature is provided.



SIGNING A BUSINESS ASSOCIATE AGREEMENT WITH PREVISER:

Select any of the **Add Signature** buttons to go to the Confirm Your Network Participation page.

Click **then go here** to sign a BAA directly with PreViser.

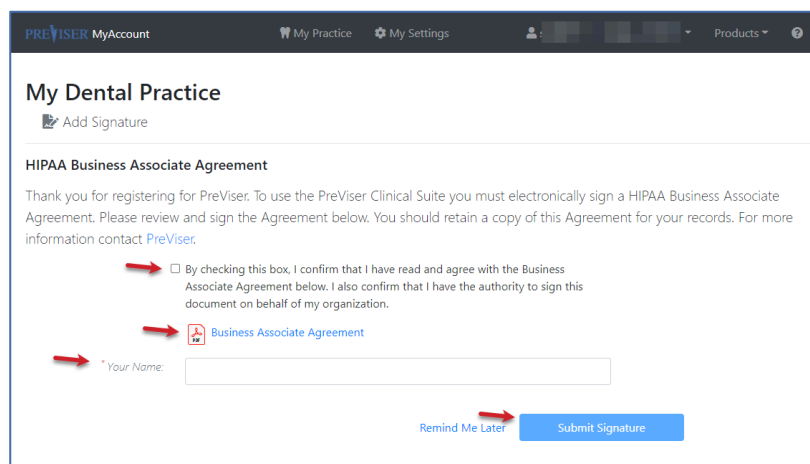


Read the BAA.

Check off the box stating you have read it.

Type your name (***again, only if you have the authority to do so on behalf of the practice***), and

Click **Submit Signature**.



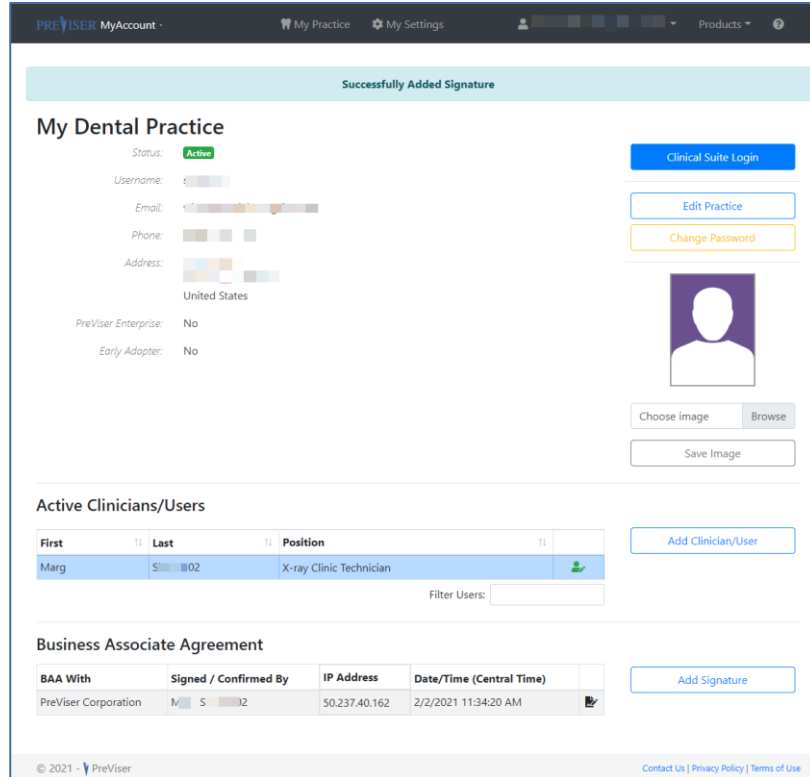
continued

The following page will display a **Successfully Added Signature** message at the top.

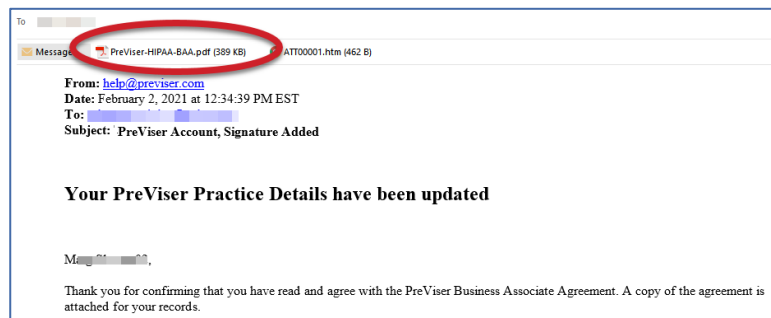
Information about your account is also shown including, a list of your users and when and by whom the BAA was signed.

Functions you can launch from this page are:

- Clinical Suite Login
- Edit Practice
- Change Password
- Choose Image
- Add Clinician/User
- Add Signature (BAA)



A successfully added signature automatically sends you an email with a PDF copy of the BAA attached.



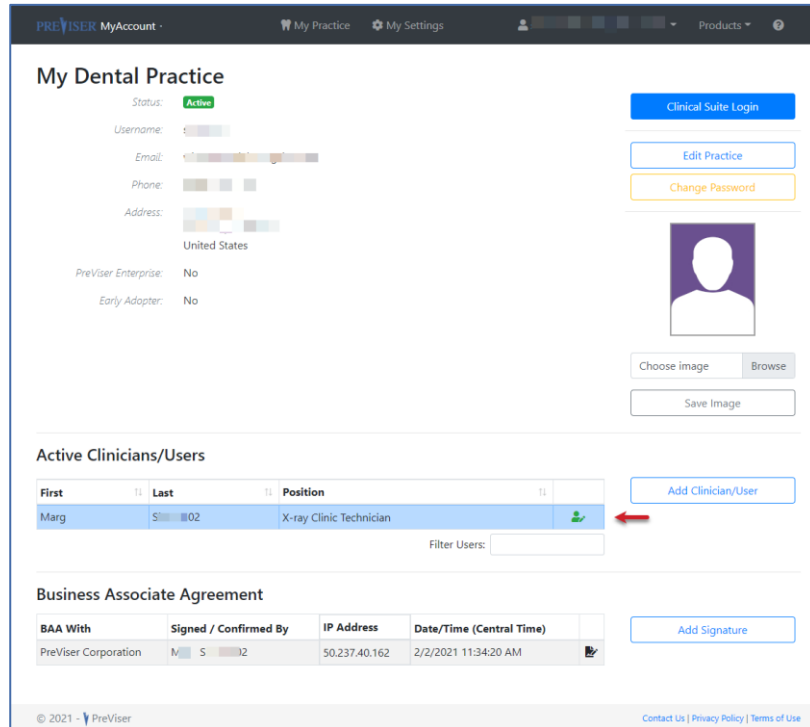
PRIMARY/ADMIN USERS

The **Primary/Admin User** is the person who registered for the PreViser Account. Only this person has control over the account until he or she adds another user with admin privileges. Users with admin privileges will have a green logo on the right side of the position column.

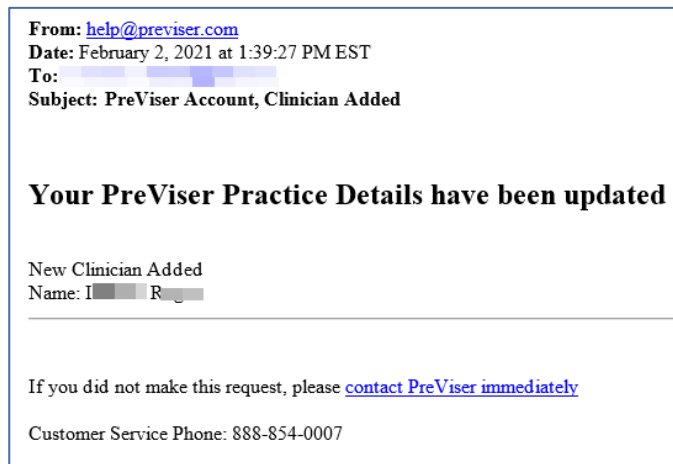
When a Primary/Admin User logs into MyAccount, this landing page displays:

Primary User/Admins can update the following account information:

- Practice address
- Practice phone number
- Practice logo
- Add clinicians/users and assign admin credentials
- Update PINs and user information.



Note: Whenever you make a change to your account, automatic emails are sent to notify you of the change.



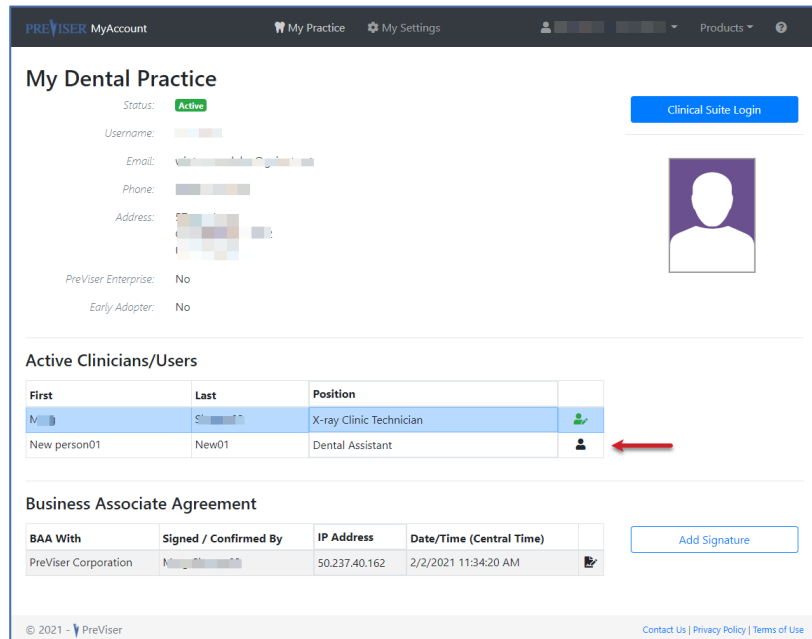
ADDITIONAL CLINICIANS/USERS

Additional Clinicians/Users are the clinicians/users who are added to the account.

Additional Clinicians/Users without admin privileges will see this landing page:

Additional users who do not have admin privileges will appear on this list with a black logo on the left side of the position column.

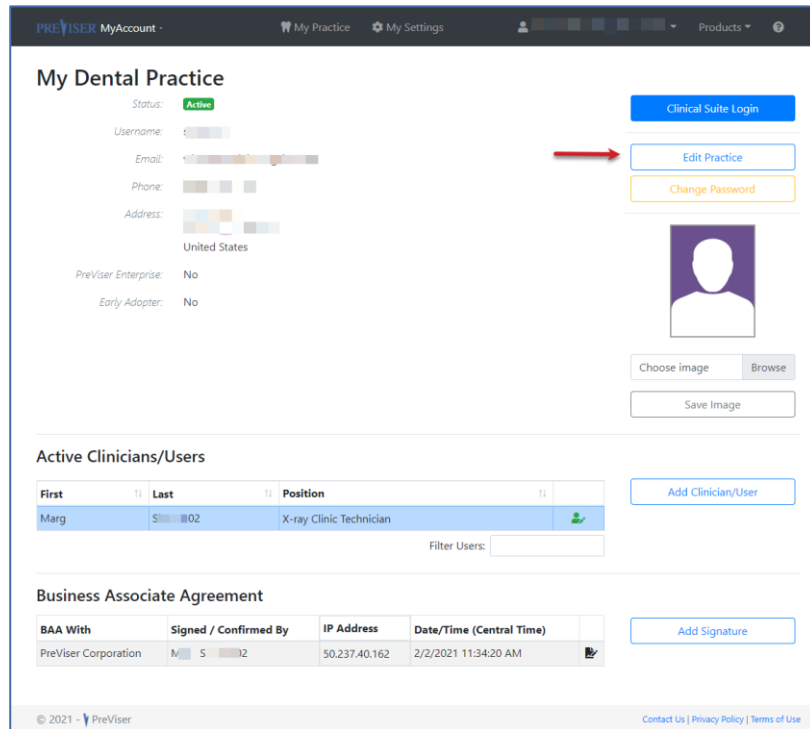
These users can access MyAccount with their own PINs, but do not have admin privileges to change the PINs or information of other users.



UPDATING YOUR ACCOUNT

EDIT PRACTICE

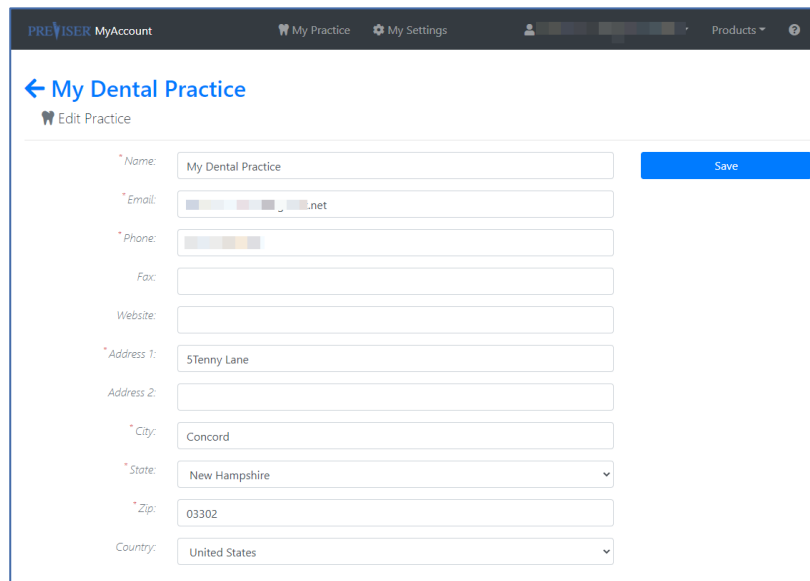
To make changes or updates to the account, log in and click **Edit Practice**.



This is where you have the option to update most of your account information.

Note: The username for the account chosen at the time of registration cannot be changed.

Click the **Save** button when all desired changes are made.



CHANGE PASSWORD

Click **Change Password**.

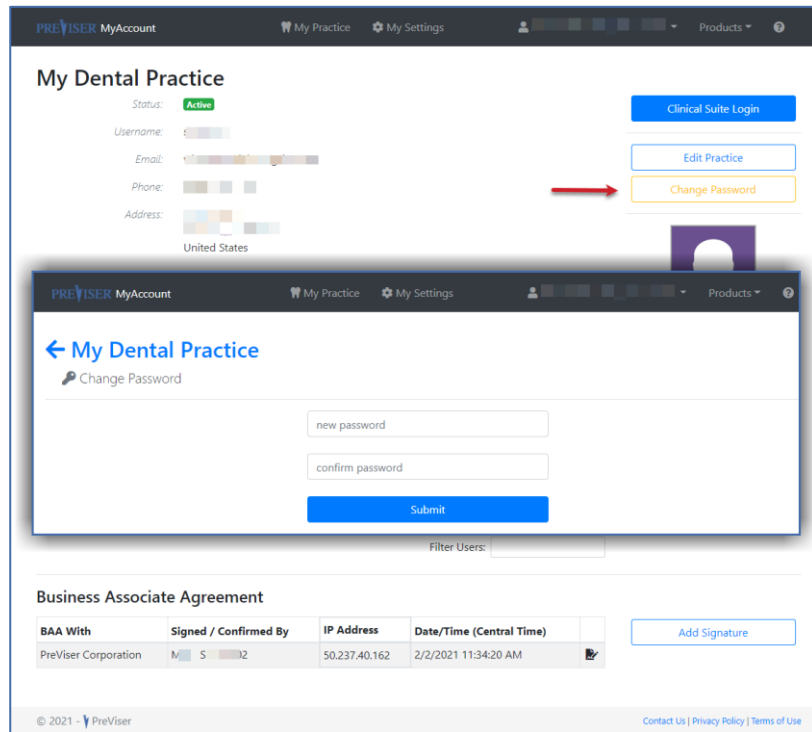
Passwords must be 10 characters or more and not contain spaces.

Type the new password.

Tab to the confirm password field and type the new password again.

If they match, no prompts in red font will display.

Click **Submit**.



PICTURE/LOGO

You also have the option to market your practice by uploading a picture of the dentist or logo of the practice.

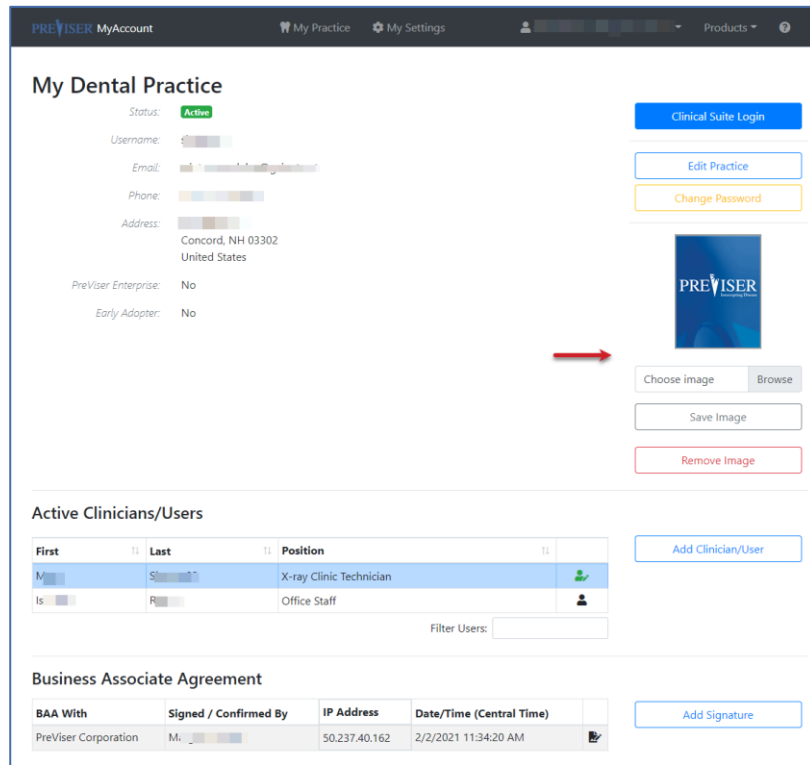
This image will appear on the patient report generated by the clinical assessment tool, the Clinical Suite.

The image must be in *.jpeg, *.png, or *.gif format and less than 10 MB in size.

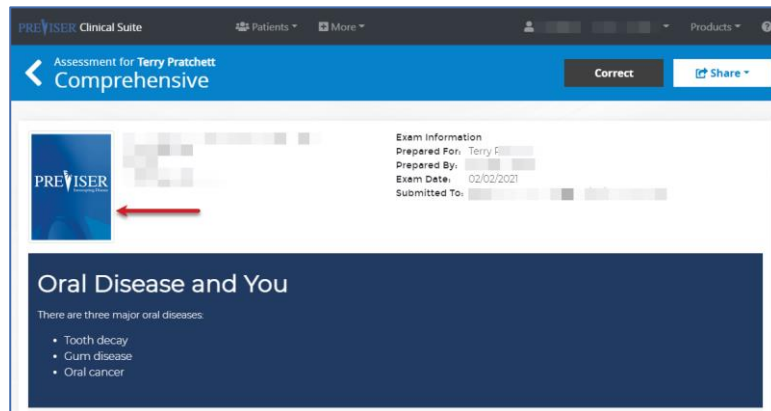
To upload an image:

Click **Browse** and navigate to the location on your computer in which your image is stored.

Select the image and click **Save**.



Once selected and saved, the image will appear on the patient report as shown:



ADDING NEW USERS/PINS

To be HIPAA compliant, an individual PIN should be assigned to anyone who has access to the Clinical Suite and can touch patient records. Additional users log in using the account’s username and password and their own, unique PIN.

Note: When distributing PINs to your team, stress the importance of not sharing the numbers.

As the [Primary User/Admin](#), you can add other users to the account by clicking the **Add Clinician/User** button.

The list of all active users who have been added under the account displays below the Active Clinicians/Users heading.

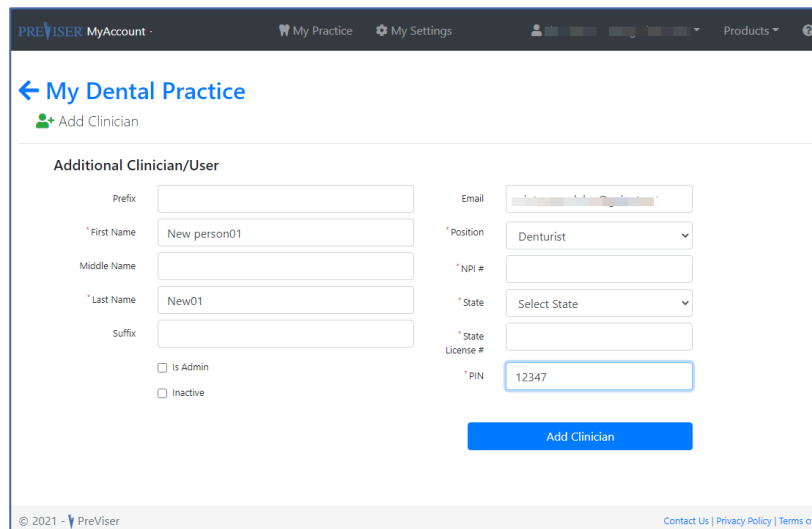
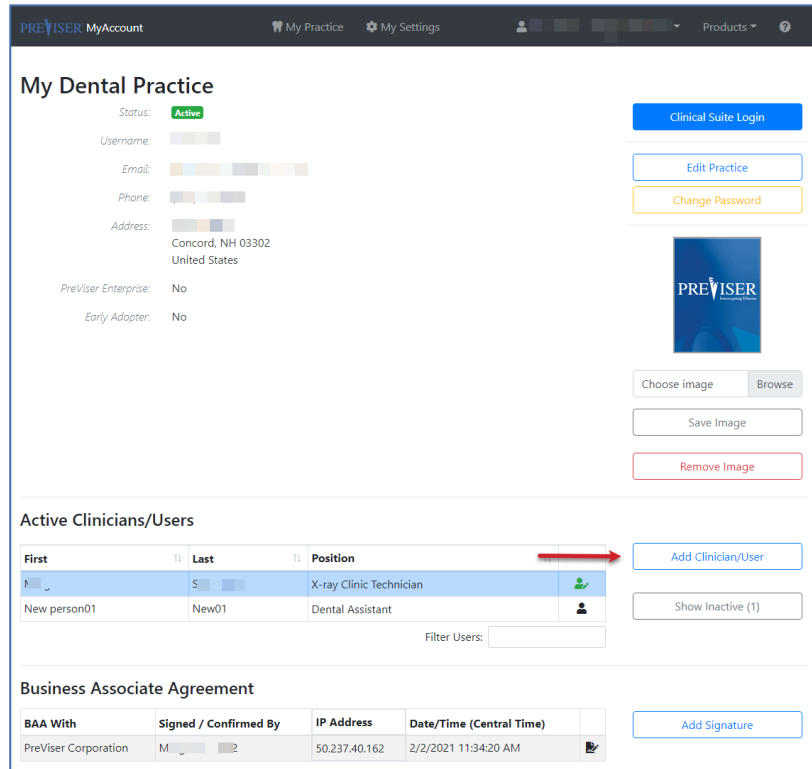
(If you have inactive users, a **Show Inactive (#)** button displays under the Add Clinician/User button.

Click **Add Clinician/User**.

Simply fill in the information, create a unique PIN for that user, and click **Add Clinician** at the bottom.

Note: If the additional users are licensed dentists or independent practitioners, NPI#, primary practice State, and State License# are required.

These fields will not display for additional users who are not licensed dentists or other independent practitioners.



CHANGING PINS/PERSONAL INFORMATION

Any user (Admin or not) can log in with their PIN and change their PIN and their personal information.

Note: [Admin/Primary Users](#) can make changes to other users' information by clicking any user's name from the list of clinicians.

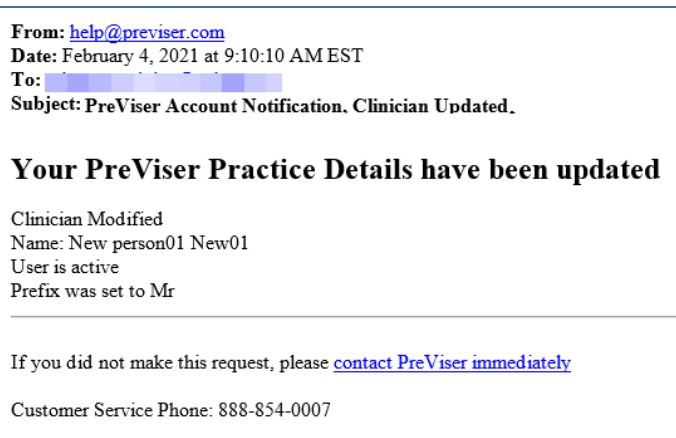
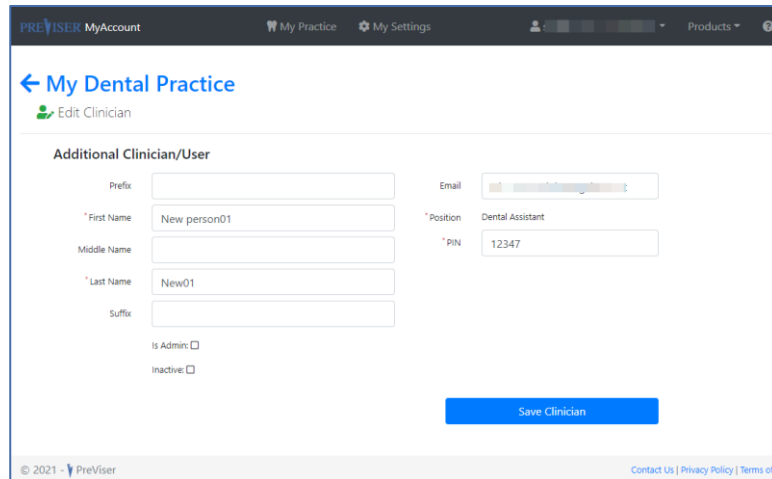
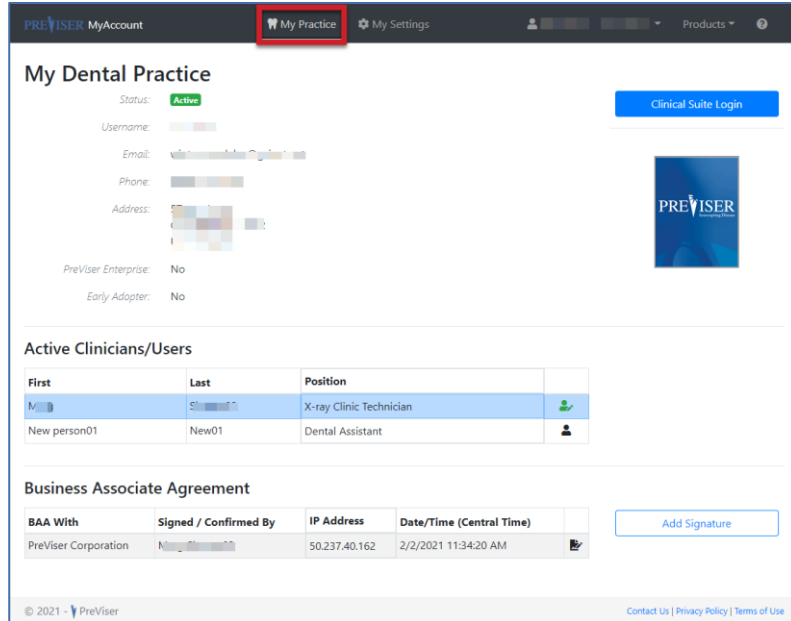
Unless the user making the changes has been given admin privileges, they will not have the ability to make changes to the "Is Admin" or "Inactive" check boxes.

Click **My Settings** at the top of the page.

The Edit Clinician page displays containing the fields appropriate to the selected person's position.

Make the required updates and click **Save Clinician**.

All changes will send a confirmation email to your account's email address.



IS ADMIN AND INACTIVE CHECK BOXES

A major difference for the [Admin/Primary User](#) versus other users are the “Is Admin” and “Inactive” options. When a user’s **Is Admin** box is checked, that user now has read/write access within the account and can make changes to the account and to other users’ information.

This is useful for office managers who may be in charge of updating the email address, phone number, picture, etc. within the account.

Inactive is used when you wish to temporarily suspend Clinical Suite access to a team member.

Note: If the user is associated with a prior Clinical Suite assessment and has been made “inactive,” the assessment history associating that clinician with the patient will be preserved.

If the Primary/Admin Users need to view all of the inactive users, simply click **Show Inactive**.

To return to active users, click **Show Active**.

Active Clinicians/Users

First	Last	Position	
Marg	S...	X-ray Clinic Technician	
New person01	New01	Dental Assistant	

Filter Users:

Show Inactive (1)

Inactive Clinicians/Users

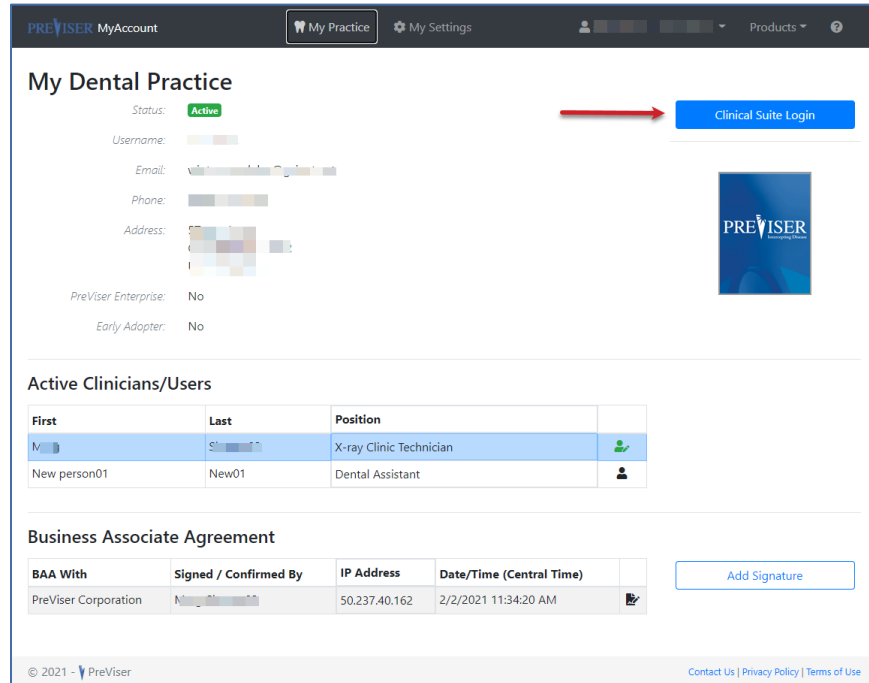
First	Last	Position	
Isabelle	R...	Office Staff	

Filter Users:

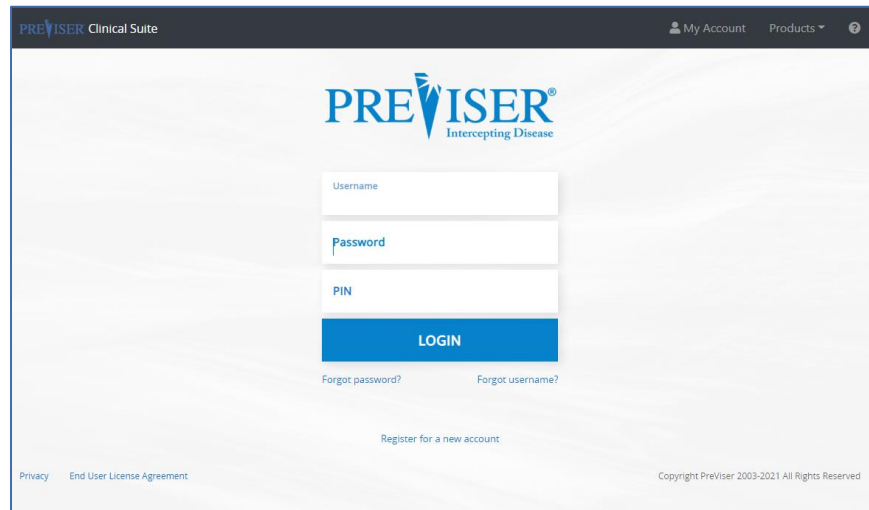
Show Active (2)

Now you are ready to begin using PreViser’s assessment tool – the Clinical Suite!

To navigate to the Clinical Suite from MyAccount, go back to the main page and click the blue **Clinical Suite Login** button.

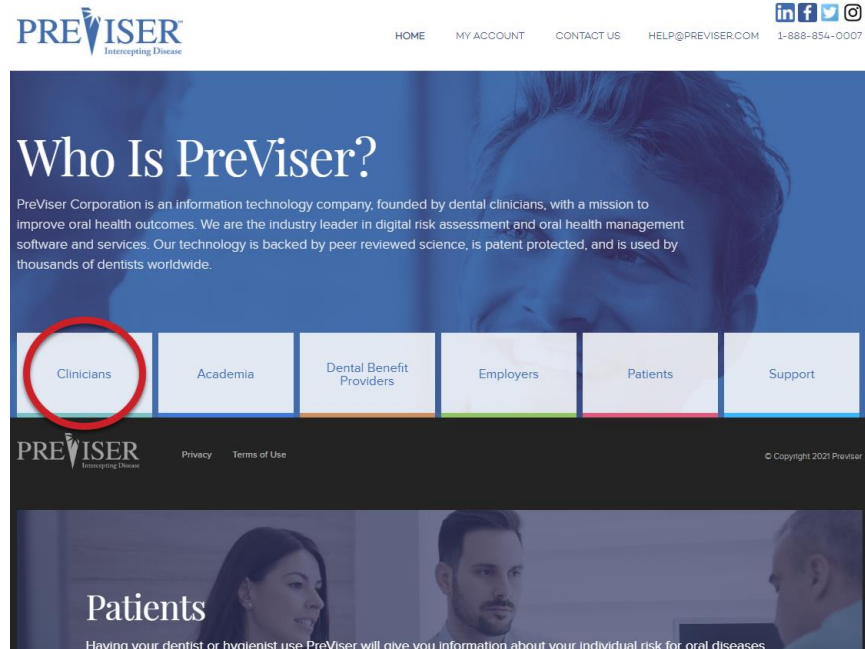


This will take you directly to the log in page:

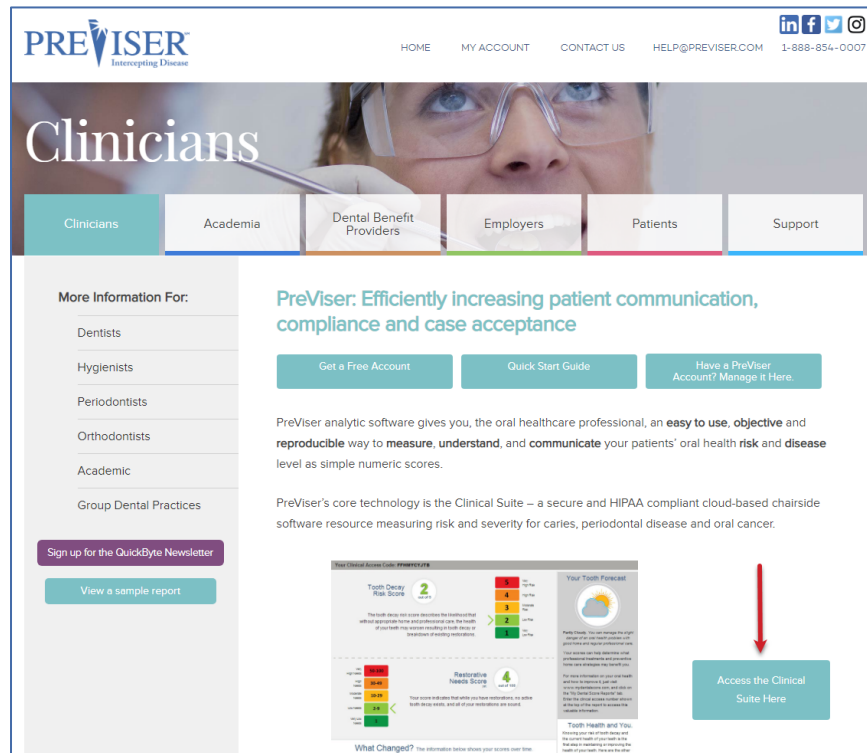


When you get to the Clinical Suite log in page, type in the credentials you used to register for/sign in to PreViser’s MyAccount.

OR You can start on the PreViser website: <https://www.previser.com/>, then click **Clinicians**.



Scroll down the page and click **Access the Clinical Suite Here**.



See PreViser’s [Clinical Suite documentation](#) to learn more about the Clinical Suite.

For Videos, Trainer Resources, additional documentation and more, go to <https://www.previser.com/support/>.