CloudDDS is the pioneer of
cloud-based referral management
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manage, and transfer dental records,
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User Guide

Version 4.0
Specialist
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Overview

CloudDDS is the pioneer of cloud-based referral management tools. It allows you to store, manage, and transfer dental records, capture patient treatment costs, and access files anywhere, 24/7.

This User Manual provides step-by-step instructions for managing patient referrals and exchanging electronic health records via the CloudDDS web portal.

Contact Information

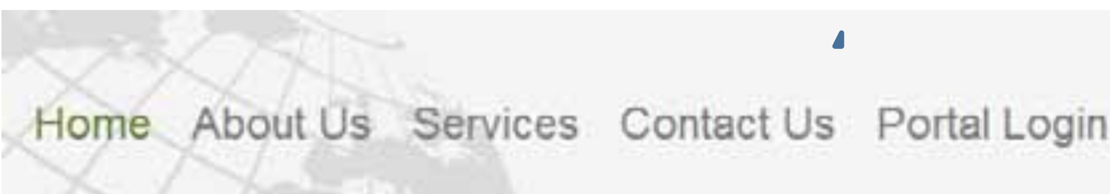
If you need additional assistance accessing or using the website, please contact our Customer Service Department at info@clouddds.com or call us at (901) 347-3104.

Getting Started

When you sign-up for the CloudDDS referral management tool, you will be sent an email providing your username and instructions for setting up your password. Once this process is complete, you are ready to Login. If you have posted a link on your web page, please click the link and follow steps two through four below**.**

Login

1. Go to **http://clouddds.com/**
2. Click **Portal Login** on the main navigation menu.



3. You will be directed to the portal sign in page.
4. Enter your Username and Password.
5. Click **Sign In** or hit enter on your keyboard
6. You will be directed to you're **My Home** Page.

You may also access your service by going directly to the CloudDDS referral portal.

1. Go to **https://portal.clouddds.com**
2. Enter your Username and Password.
3. Click **Sign-In** or hit enter on your keyboard
4. You will be directed to your **Home Page.**

Forgot Password or Username?

*If you have forgotten your user name or password, just follow the links under the **Sign In button**.*

Your user name or password will be sent to you.

My Home

After logging in, you will automatically land on your **My Home** page. The **My Home** page is divided into three areas.

1. Main Navigation Menu - A menu bar is located on the folder tabs located at the top of the **MyHome Page**. You will use this menu to navigate through the website and complete patient related activities. This menu bar is visible at all times.

2. News And Announcements **–** The **News and Announcements** section allows you to post informational articles, announcements and event information (*See Article and Event Management.*)

3. Utilities Menu **–** The utilities menu allows you to access training and support information as well as sign out of the system.

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Referral Management

You will add new referring Dentists, view referral activity and access contact information on the Referrals page.

Add a New Dentist

1. Click the **Referrals** tab on the **Navigation** menu.

2. The **Referrals** page will launch.

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3. Click **Add New Dentist**.

4. The **Add New Dentist** data entry form will launch.
5. Entered the required information.
6. Click **Save**.

The Dentist will be added to your **Referrals** list and sent an invitation from you to utilize the CloudDDS referral site. The email will contain a link that the Dentist will use to activate his account registration and access training materials.

Once these steps are complete, you are ready to begin receiving referrals.

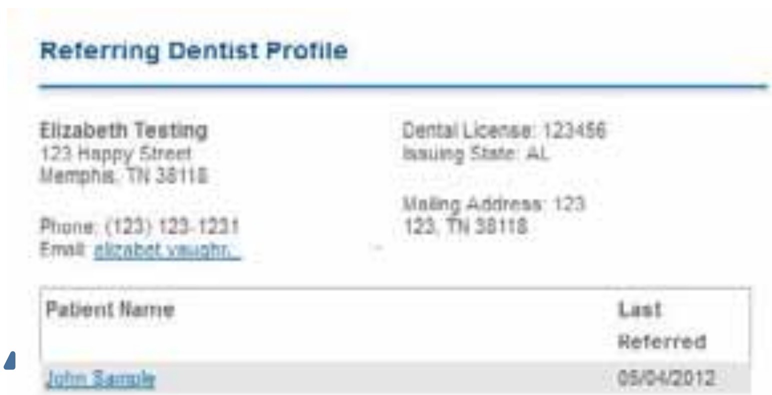
Review General Dentist Profile and Referrals

To review referral activity counts, patient referral lists, or access a Dentist's contact information:

1. Click the **Referrals** tab on the **Navigation** menu. Each of your referring Dentists will be listed with the total number of referrals received to date.

2. Click the Dentist's name to see their contact information, specific cases referred and the date of the referrals.

3. Click the patient name to launch that case and perform patient related activities (*See Patient Management.*)

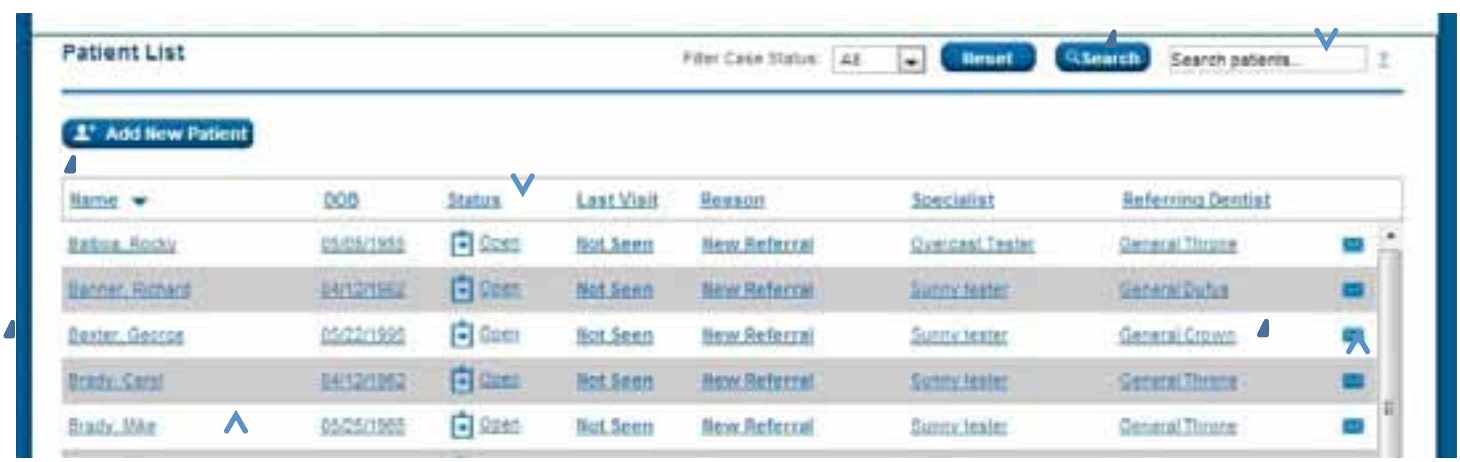


Case Management

Patient related activities are accessed from the **Patient List** page. Each of the patients referred to you are displayed along with date of birth, last visit, reason for visit and the referring Dentist. If your practice has multiple specialists, files for all specialists in the practice are displayed.

Patient List Activities

Sort - To sort the Patient List, simply click the column header of the desired sort type.
Search - You may search by patients via name, social security number or date of birth by entering the search criteria in the Search field.
Message - You may send a message to the referring Dentist by clicking the envelope at the end of the row containing the patient information. Utilizing this function will auto-fill the patient name in the message and store the message in the patient file.



Patient Status

The patient status is indicated on the patient list:

Name	DOB	Status	Last Visit	Reason	Specialist	Referring Dentist	
Balboa, Rocky	05/05/1955	Closed	10/31/2012	Closed	Overcast Tester	General Throne	
Baxter, George	05/22/1965	Active	10/01/2012	Initial Visit	Sunny tester	General Crown	
Brady, Carol	04/12/1962	Open	Not Seen	New Referral	Sunny tester	General Throne	

Open: The patient has been referred but not seen.

Active: The patient has had at least one visit with the specialist.

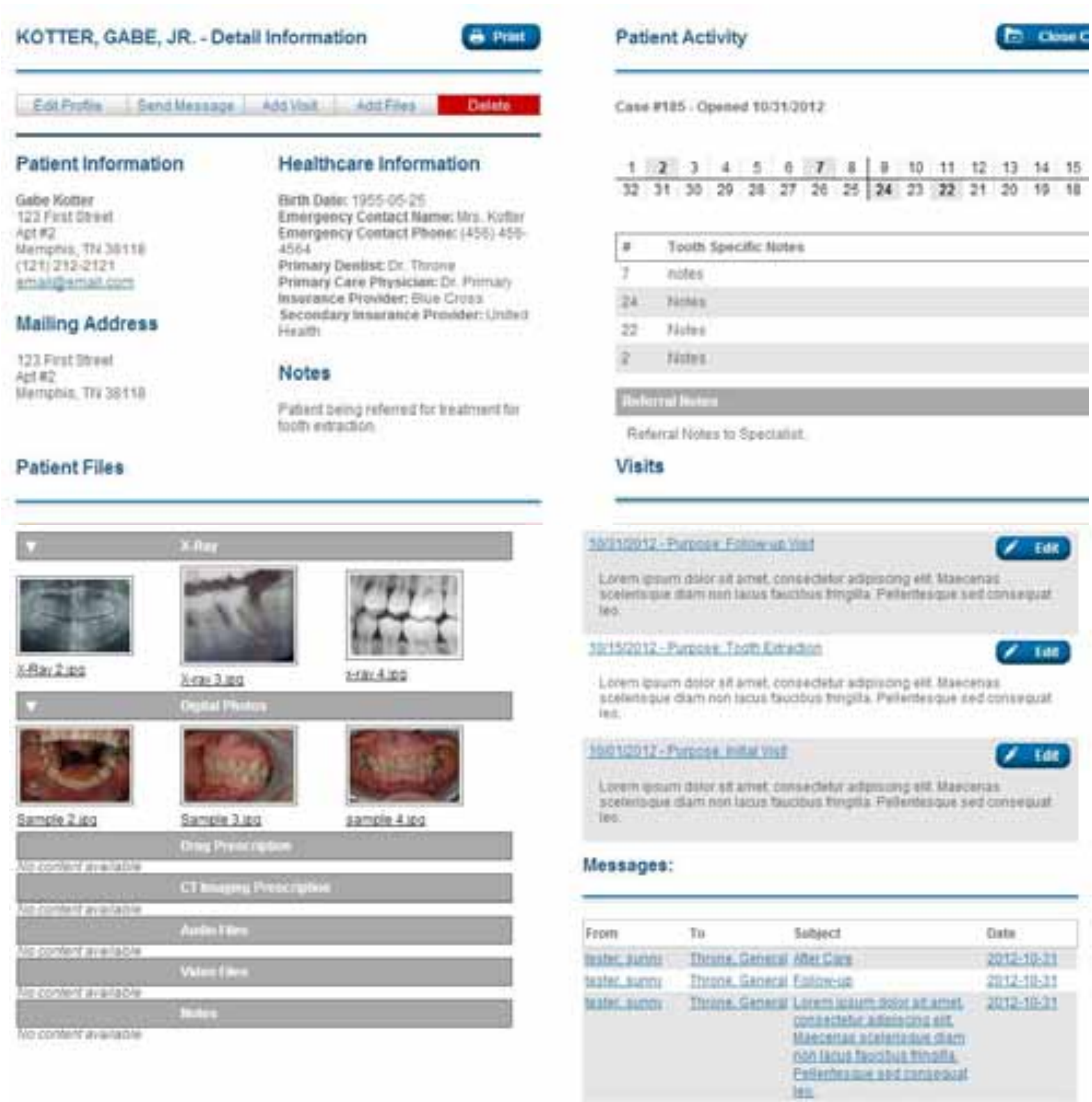
Closed: The specialist has completed the referral and closed the case.

View Patient Record

To view new patient referrals, record patient visits, files (documents, X-Rays, photos….) and patient personal information you will access the **Patient Detail Information** page.

1. Click **Patients** in the main navigation menu. The **Patient List** will display.
2. Click the patient name.
3. The **Patient Detail Information** page will display.

The **Patient Detail Information** displays all patient contact and healthcare information as well as initial referral notes, tooth specific notes, visit information, messages regarding the case and all patient files.



Print Case File

To print a patient file, simply click the Print button located next to the patient's name on the Patient Detail Information page.

Edit Patient Information

To change a patient's basic information such as name, address, vital statistics and health care providers:

1. Click the **Patients** tab on the **Navigation** menu.
2. Click the Patient name on the **Patient List**. The patient **Detail Information** screen will launch.
3. Click the **Edit Profile** link located under patient name in bold. The **Patient Data** entry form will launch.

4. Click fields and enter new data as desired.
5. Click **Save**.

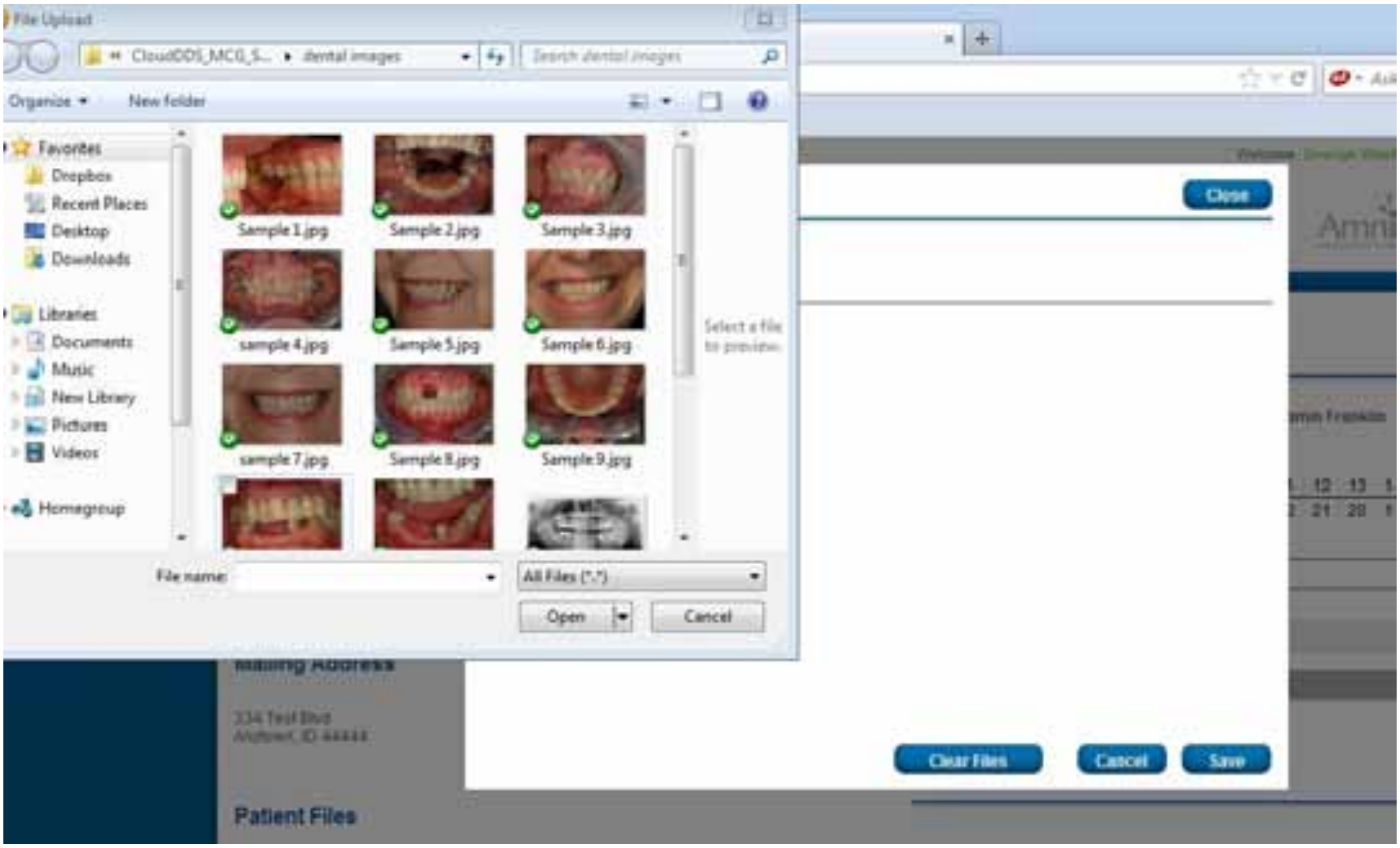
Add Files to a Case

You may add any file such as but not limited to X-rays, Digital Photos, Drug Prescriptions, CT Imaging Prescriptions, Audio Files, Video Files, and general scanned documents to a case by uploading files directly into the patient case.

1. Click the patient name on the patient list.
2. Click the **Add Files** link.

3. The **Add File** popup box will launch.

4. Click the **Upload Files** button. A browser will launch.



5. Click the desired files or file and click **Open** in the browser window. The selected files will load.

Want to upload multiple files from the same file folder? Hold down the mouse button and drag over the photos you want to select or hold down the control key (command key on Macs) and click on each photo. Then Click "Open".

6. The files will upload and you will be presented with options to name and categorize the files.

    Change File Name - You may change the file name by typing over the existing file name in the File # field.
    Categorize - You may select a type (from the dropdown) to place the file in the appropriate category under the Patient Files section of the Patient Detail information.
    Additional Information - You may add additional description information in the field Description.

7. Click **Save**. The files will be saved to the Patient case.

If you have erroneously uploaded a file, you must hit the ***Clear Upload*** *button in the Add File popup box and then reselect and upload your files.* ***You cannot individually delete files and the files cannot be edited once they have been loaded to a patient file.***

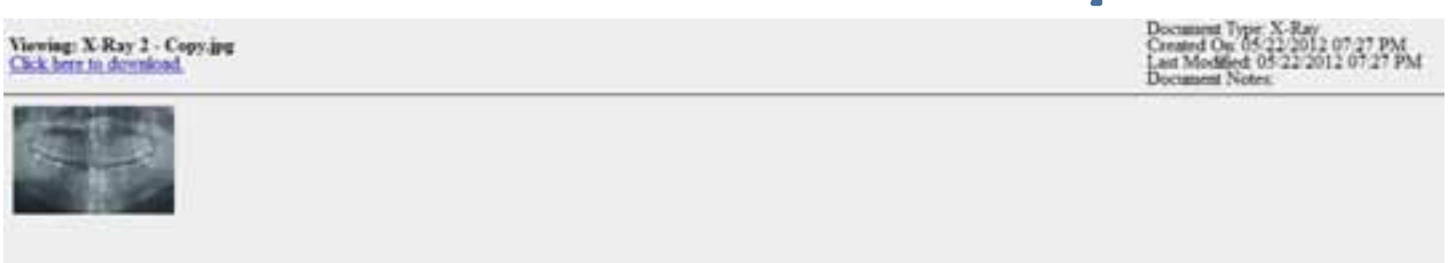
View and Download Case Files

To view and download patient case files:

1. Click the patient name on the **Patient List**.
2. Click the desired file from the **Patient Detail Information**. The file will be launched in another browser window.

3. To download the file, click the **Click here to download** link.
4. Notes will be displayed at the top of the page.

Download **Notes**

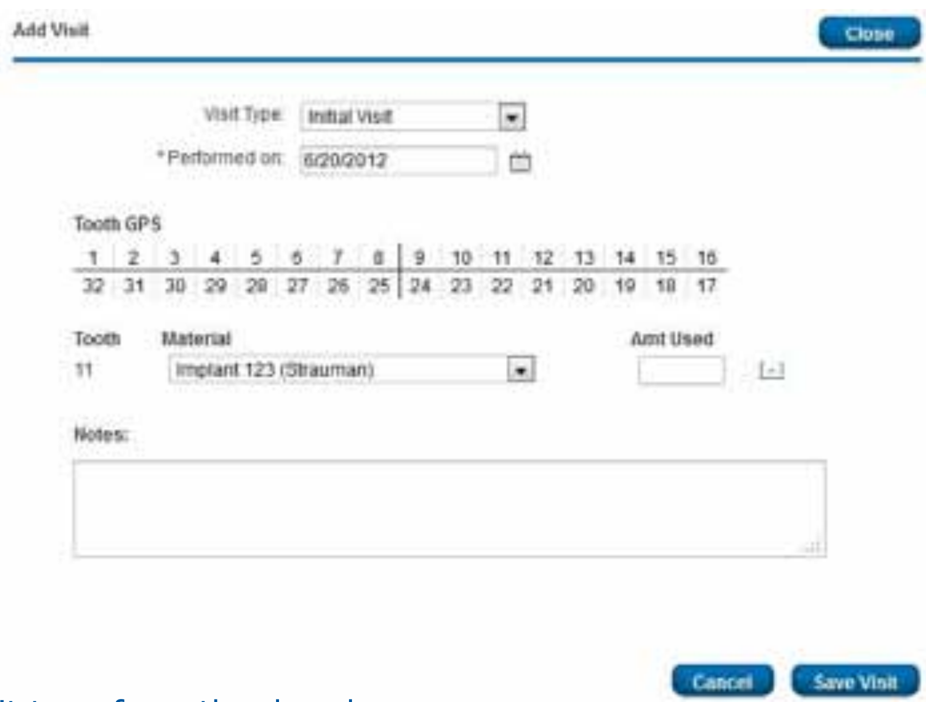


Add Visit Notes to a Patient Case

To record consultation notes and a reason for patient visit:

1. Click **Patient** on the **Navigation** menu.
2. Click **Add Visit**.

3. The **Add Visit** popup box will launch.



4. Select the visit type from the dropdown menu.
5. Enter the date of the visit.
6. To record materials used, click on the tooth GPS, select the material from your supply cabinet utilizing the dropdown menu. See Tools, Supply Cabinet.
7. Enter desired notes.
8. Click the **Save Visit** button.
9. The patient status will change from Open to Active after the first visit is entered.

Create a Referral

You may create a referral to yourself on behalf of a General Dentist. The first step in creating the referral is adding the patient to the referral system.

1. Click the **Patients** tab on the **Navigation** menu.
2. Click the **Add New Patient** button.
3. The **Patient Information** Page will load.
4. Enter available information. Be sure to complete all required fields indicated in red.
5. Click **Save**.The **Referral** page will display.

The second step is to create the referral and add files to the case.

1. Verify the Patient Information
2. Click the tooth GPS as desired and enter notes for selected teeth as needed. You may also enter referral notes in the **Notes** fields.

3. Attach files: To upload files to the referral case, click **Upload New File**. *See page fourteen for additional instructions regarding the Upload File popup box and selecting files to be uploaded to the case.*
4. Select the referring General Dentist from the dropdown menu. (please note that the step instructions on the screen state Choose Specialist – since you are logged in as a Specialist, you will only be presented with General Dentist selection list. Disregard the instruction Choose Specialist.)
5. Once you have uploaded the files and entered all referral data, click **Send Referral**.

An email will be sent to the General Dentist with a notification that a new patient has been referred on their behalf. All information will be immediately accessible to the General.

Message Management

Dentists and Specialists in your network may exchange secure messages utilizing the messages function. The messages function also provides alerts when a referral is received, a case is changed, a patient profile has been updated or documents are added. It has been designed to work like email for ease of use. However, unlike email, messages are accessed from our secure site, so you can safely and securely exchange information and be in regulatory compliance.

Send a Message (not saved to a case)

1. Click the **Messages** tab on the main navigation menu.
2. The **Messages** Page will display.
3. Click the **New Message** button.

4. The **Send Message** box will appear.
5. Click the "**To:"** line and select the desired Doctor from the drop down menu.
6. Enter the subject and text of your message.
7. Click the **Send Message** button.
8. You may also click the **Cancel** button or the **Close** button to cancel the message.

Send and Save Message to a Case

Messages sent from the Messages Page will not be added to the Patient file.

1. Click the envelope icon next to the patient name on the **Patient List** or click the **Send Message** link in the **Patient Detail Information** section.
2. The **Send Message** popup box will launch.
3. The “To:” field will auto-fill with the partnering Dentist or Specialist.
4. Enter the desired message.
5. Click **Send Message**. The message will be saved to the Patient Case and will also appear on the **Messages** list.
6. If the Dentist or Specialist has elected to receive alerts via email, he will receive a notice to check CloudDDS for a message sent from you.

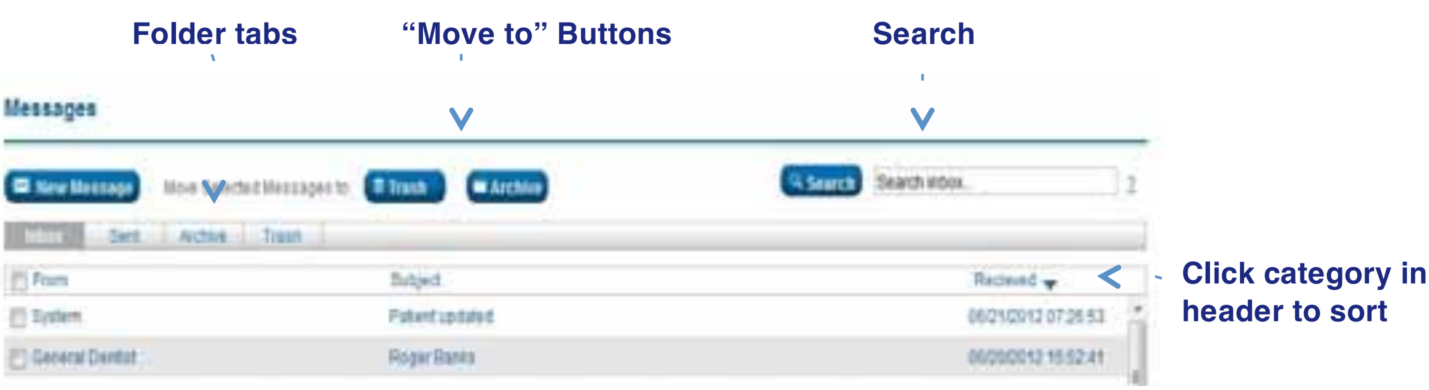
Message Organization

The Messages function allows you to organize your messages in a variety ways. Four folders are available – Inbox, Sent, Archive and Trash.

All new messages will automatically be saved to your Inbox. You may move the message to a different folder by clicking the open box next to the message and then clicking the destination desired (button). Please note, the sent folder does not have an option to move a message.

You may sort messages by clicking the column header of your sort criteria (From, Subject, Received).

The search function allows you to search for messages that are in the folder you are accessing when you enter the search criteria. For example, if you search your Inbox, the system will return messages located in the Inbox (but not Trash and Archive).



Tools and Alerts

Access the Tools menu from the main Navigation menu to keep your practice information up to date and set your Alert preferences.

Edit Practice

Update your practice information (address, phone and contact information.)

1. Click **Tools** on the **Navigation** menu.
2. Click the **Edit Practice** button to edit information. The **Editing Practice Profile** popup box will launch. *Fields common to a Practice Group will be unavailable for editing at the individual level. Contact CloudDDS to implement changes at a Practice Group level.*
3. Enter desired changes.
4. Click **Save.**

Set Alert Preferences

You may elect to receive email alerts when Patient activity is conducted in the web portal. Use this same procedure to cancel an **Alert Type**.

1. Click **Tools** on the **Navigation** menu. Various Alert options are displayed.
2. Click the box next to the desired **Email Alert Type.**
3. Click **Save Alert Settings.**

Manage Account

You may contact CloudDD questions about your account and subscription by clicking the link info@clouddds.com or phone (901) 347-3104.

Supply Cabinet

The **Supply Cabinet** allows you track material inventory as you perform procedures. When you **Add a Visit** to a patient case, you have the option of indicating how many units of a material were used for that specific procedure. After entering the number of units used, the inventory in your **Supply Cabinet** is reduced. To begin utilizing this feature, you must first add supplies to your inventory:

1. Click **Tools** on the **Main Navigation** Menu
2. Click **Add Supplies**. The **New Supplies** popup box will launch.
3. Enter available information.
4. Click **Save**.

Article Management

The article management feature gives you a platform to communicate with your referring Dentists. The articles appear first each time the referring Dentist logs into the referral site and are located on the **My Home Page.**

Create a New Article, Announcement or Event

1. Access your **My Home** page
2. Click the **Add new Article** button. The **Add New Article** popup box will launch**.**

3. Enter the title and article/information.
4. Click **Save .**

Edit or Change an Article, Announcement or Event

1. Click the **Edit Article** link. The **Add New Article** popup box will launch.
2. Make your changes.
3. Click **Save**.

For information on utilizing functions such insert image, center, styles, please go to http://docs.cksource.com/FCKeditor_2.x **for user guides.**