

Dolphin Mobile Client User's Guide

Version 4
January 2017

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Welcome

Congratulations on your decision to purchase the Dolphin Mobile client (Dolphin Mobile), which enables you to access your Dolphin database from a mobile device running Android or iOS. Dolphin Mobile provides a read-only subset of Dolphin Management and Dolphin Imaging features and a subset of Dolphin Aquarium features.

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

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

Requirements

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

Features in Dolphin Mobile

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

If you have Dolphin Aquarium only installed:

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

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

If you have Dolphin Imaging installed only:

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

Requirements

If you have Dolphin Management installed:

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

This Guide is organized as follows:

[Logging in to Dolphin Mobile](#)

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

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

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

[Using Dolphin Mobile with Dolphin Aquarium](#)

[Customizing](#)

Logging in to Dolphin Mobile

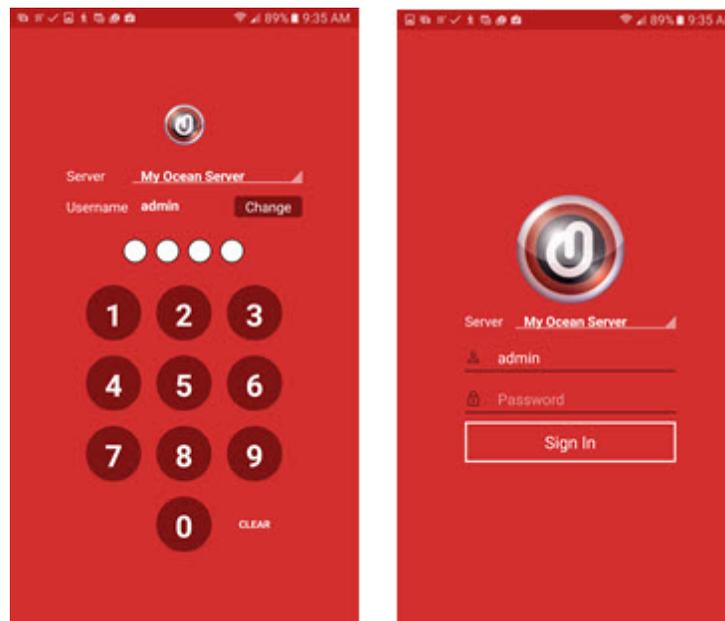
Once Dolphin Mobile is installed and running on your mobile device, logging in varies depending upon whether your device is set up to access one Dolphin server or multiple Dolphin server databases in different locations.

Single Dolphin Server

To log in to one server:

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

The screen you see depends upon whether or not you have set up a passcode.



- 2 Enter your four-digit passcode or your user name and password if you do not have a passcode.

The Dolphin Mobile main screen opens.

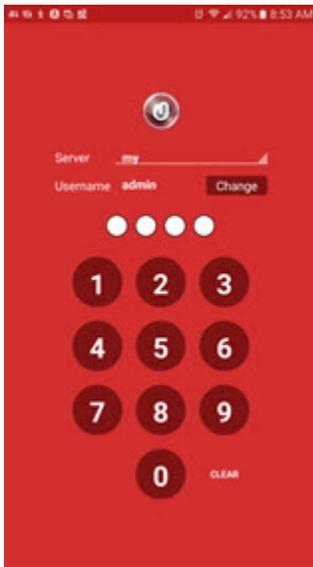
Multiple Dolphin Servers

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

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

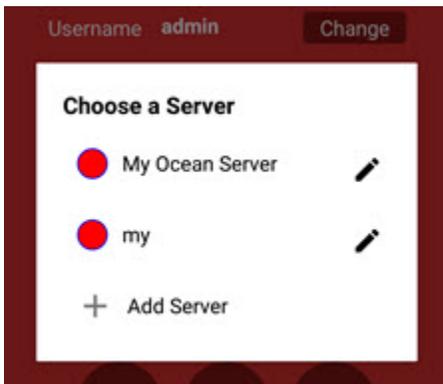
The following screen opens:

Multiple Dolphin Servers



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

Dolphin Mobile prompts you to choose a server:



- 3 Touch the server you want to use.

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

Adding, Deleting and Editing Servers

To add another server to the server list:

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

The following screen opens:

Server Name:
Name

Connection Type: Cloud Direct

Server Address: Port: 8085

Activation #: Not Activated

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

To delete a server:

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

To edit a server:

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

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

Server Name:
My Ocean Server

Connection Type: Cloud Direct

Server Address: Port:

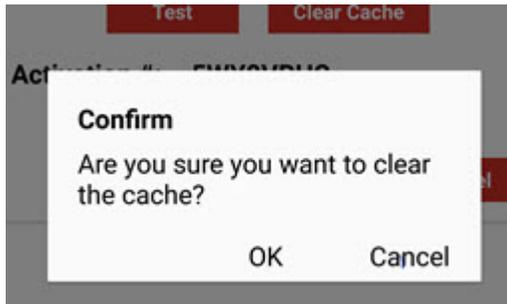
Activation #: 5WY8VRHS

- 2 To change the server name, server address, and server port, touch the appropriate area and key in the new data on the keypad.

Adding a Server after Logging in

- 3 Touch the **Test** button to test the server connection.
- 4 Optional: touch the **Clear Cache** button if you have previously viewed images, letters, or Aquarium movie clips, and you want to free up memory card space.

The following message box opens:



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

To log in as a different user:

- 1 From the **Login** screen, touch the **Change** button.
- 2 Enter the user name and password for the new user.
- 3 Enter a passcode for this user.
- 4 Enter this passcode again when prompted to confirm the passcode for this user.

Note: Every time you switch users, Dolphin Mobile prompts you to enter a user name and password, even if a passcode is set up for that user.

Adding a Server after Logging in

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

- 1 From the main screen, touch the  button.
- 2 Touch the  to show the server main menu:



- 3 Follow the instructions in [“Adding, Deleting and Editing Servers” on page 4.](#)

- 4 Touch the  to return to the main menu.

Setting a Passcode

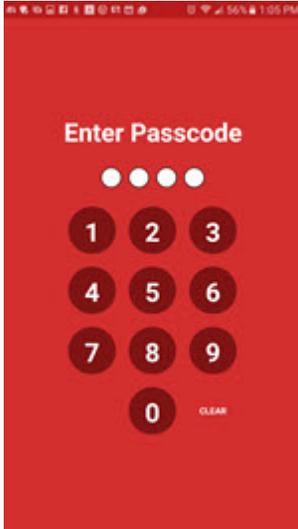
Dolphin Mobile requires you to set a passcode when you first login to the application so you don't have to enter your Dolphin user name and password every time you connect to the Dolphin server. You only need to set up a passcode once for each user.

Setting a Passcode

Passcodes apply to the last user logged in only. If another user logs in to the same device, and then you log in, Dolphin Mobile will prompt you to enter your full user name and password.

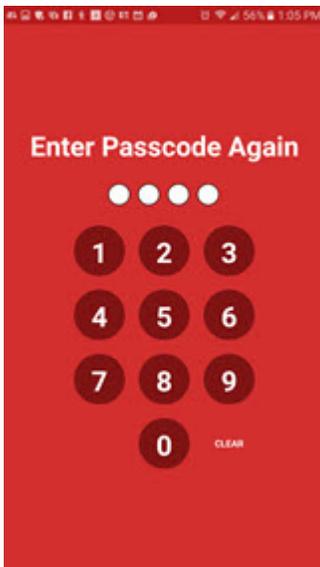
To set a passcode:

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



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

Dolphin Mobile prompts you to enter your passcode again:

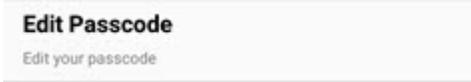


- 3 Touch the buttons on the keypad to enter your passcode.

Updating Your Passcode

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

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

- 3 Touch , and then set your passcode as described in [“Setting a Passcode” on page 7](#).

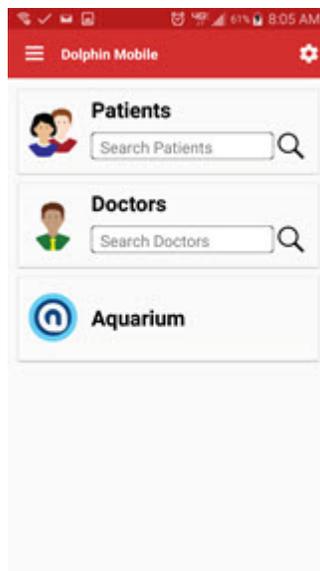
Setting a Passcode

Using Dolphin Mobile if You Have Dolphin Imaging Only

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

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

The Dolphin Mobile main screen opens.



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

View Patient Information

To view patient information from Dolphin Imaging:

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

The following screen opens:

View Patient Information

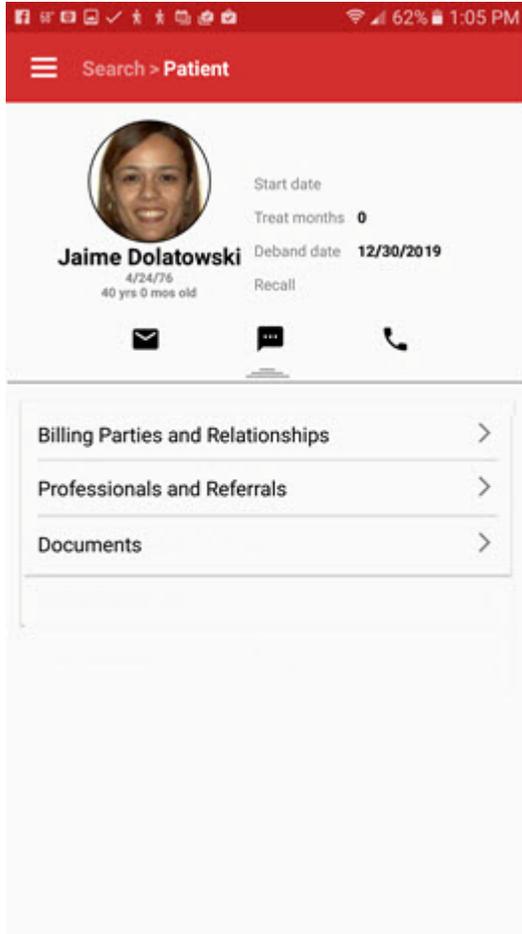


- 2 Touch the letters on the keypad to enter the name of the patient you want to view.
- 3 Touch the search button on the keypad.

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

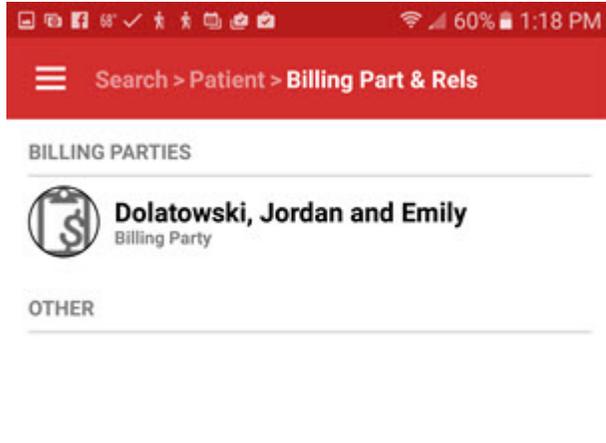
- 4 Touch the name of the patient whose information you want to view.

The patient information screen opens:

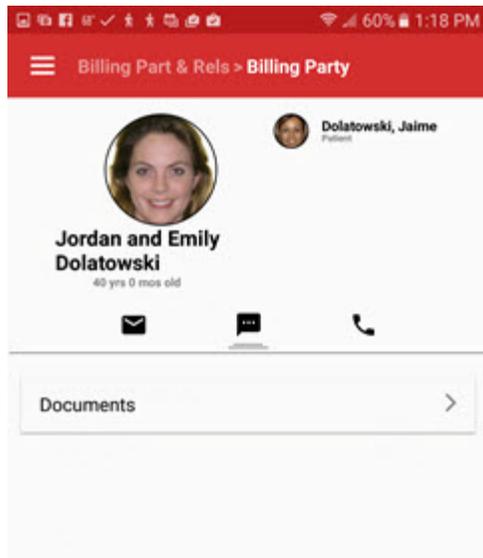


- 5 If you searched using the first few letters of a patient's last name, you can swipe left or swipe right to go to the previous or next patient meeting that search criteria.
- 6 Touch the envelope, messaging, or phone icons to email, send a text message, or call this patient.
- 7 To view more demographic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

The following screen opens:

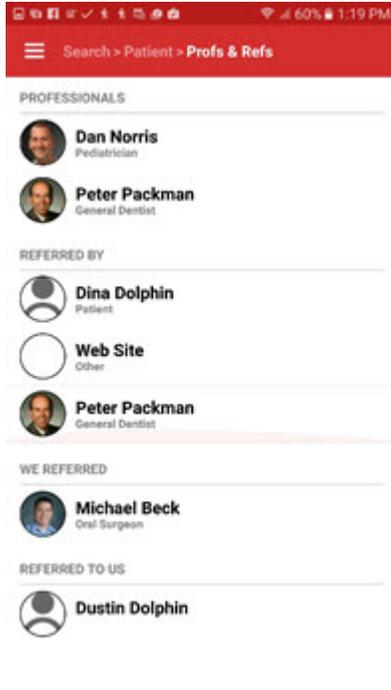


- b Touch the name of the person for whom you want to view more information:



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

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



- 10 To return to the [Patient](#) screen, touch [Patient](#)>, or touch the Back button if you are using an Android device.
- 11 To view documents associated with this patient, click the [Documents](#) button.

View Doctor Information

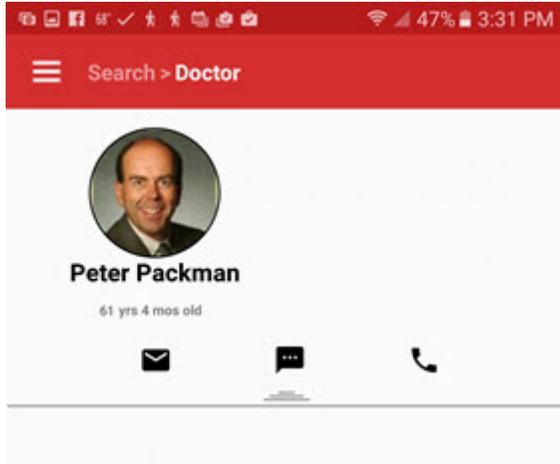
To view doctor information from Dolphin Mobile:

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

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

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

View Billing Party Information



- 5 If you searched using the first few letters of a doctor's last name, you can swipe left or swipe right to go to the previous or next doctor meeting that search criteria.
- 6 Touch the envelope, messaging, or phone icons to email, send a text message, or call this doctor.
- 7 To view more demographic information about this doctor, touch and drag the  .

View Billing Party Information

To view billing party information from Dolphin Mobile:

- 1 From the Dolphin Mobile main menu, touch the  button.
This opens the Dolphin Ocean server menu.
- 2 Touch the  **Billing Parties** button.
- 3 When the Billing Party search screen opens, touch the letters on the keypad to enter the name of the billing party.
- 4 Touch the search button on the keypad.
- 5 If more than one billing party is listed on the next screen, touch the name of the billing party whose information you want to view.
- 6 Touch the envelope, messaging, or phone icons to email, send a text message, or call this billing party.
- 7 To view more demographic information about this person, touch and drag the  .

View Patient Imaging Data

To view patient images from Dolphin Mobile:

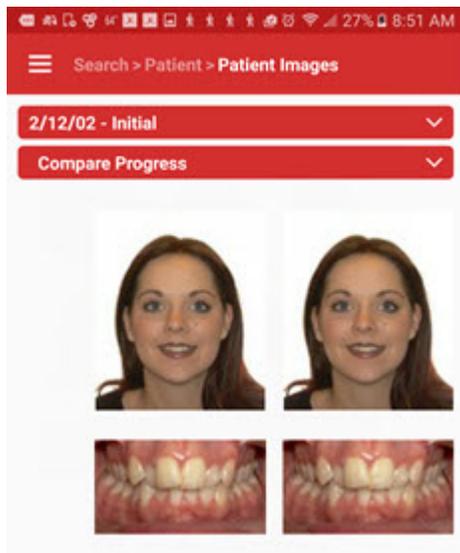
- 1 Access the [Patient](#) screen as described in [“View Patient Information” on page 11](#).
- 2 Touch the patient image.

The following screen opens:

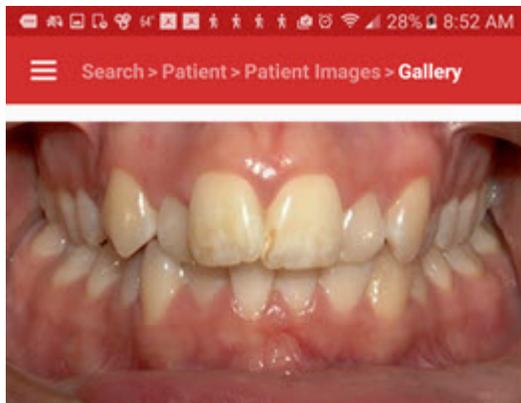


- 3 From this screen, touch the first down arrow to select a different timepoint (defaults to most recent).
- 4 Touch the second down arrow to view a menu of different image layout options. (The example below shows the [Compare Progress](#) layout.)

View Patient Imaging Data



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



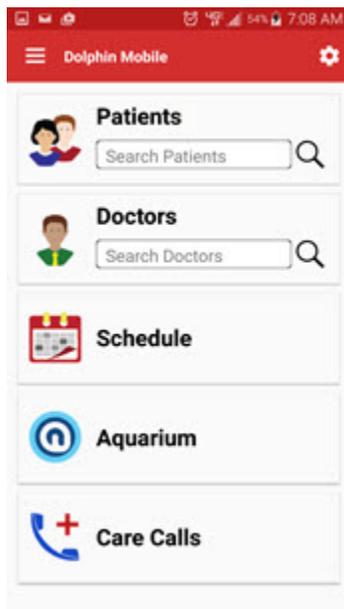
- 7 Swipe left or swipe right to view the next and previous images respectively.
- 8 Double-tap an image to zoom in on a specific area; then use multi-pinch zooming.
- 9 Drag one finger across the screen to pan a zoomed image.
- 10 Double-tap the image again to exit the zoom function and return to a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

Using Dolphin Mobile if You Have Dolphin Management

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

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

The Dolphin Mobile main screen opens.



View Patient Information

To view patient information from Dolphin Management:

- 1 Touch the Patients search box.

The following screen opens:

View Patient Information

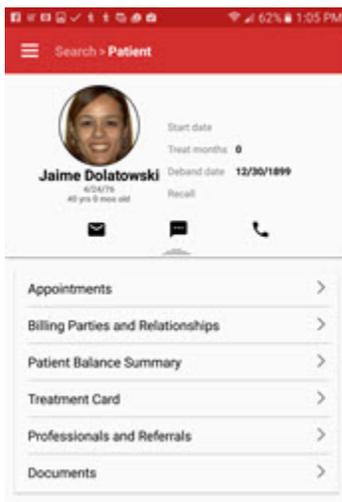


- 2 Touch the letters on the keypad to enter the name of the patient you want to view.
- 3 Touch the search button on the keypad.

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

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

The patient information screen opens:



Note: If you do not also have Dolphin Imaging installed, instead of a patient image, as shown above, a default profile image is displayed.

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

- If you also have Dolphin Imaging installed, images of this patient.

- Appointment history for this patient
- Demographic information
- Billing party and relationship information
- Balance summary
- Treatment Card information
- Professionals and referrals
- Documents

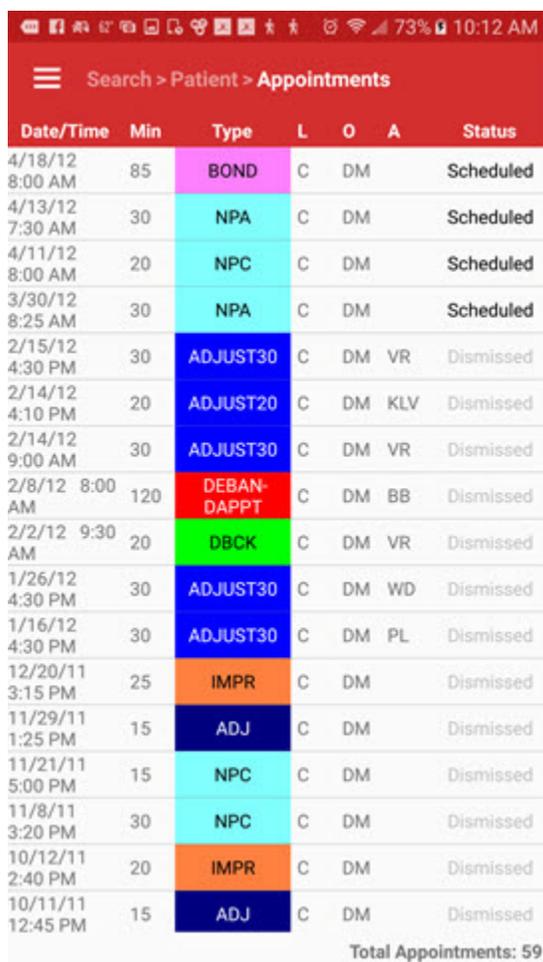
From any [Patient](#), [Billing Party](#), or [Doctor](#) screen, you can touch the envelope, messaging, or phone icons to email, send a text message, or call this person.

To view images of this patient, touch the patient image shown, and follow the directions in [“View Patient Imaging Data” on page 17](#).

To view this patient's appointment history and information:

- 1 Touch the **Appointments** text:

The **Appointments** screen opens:



Date/Time	Min	Type	L	O	A	Status
4/18/12 8:00 AM	85	BOND	C	DM		Scheduled
4/13/12 7:30 AM	30	NPA	C	DM		Scheduled
4/11/12 8:00 AM	20	NPC	C	DM		Scheduled
3/30/12 8:25 AM	30	NPA	C	DM		Scheduled
2/15/12 4:30 PM	30	ADJUST30	C	DM	VR	Dismissed
2/14/12 4:10 PM	20	ADJUST20	C	DM	KLV	Dismissed
2/14/12 9:00 AM	30	ADJUST30	C	DM	VR	Dismissed
2/8/12 8:00 AM	120	DEBAN-DAPPT	C	DM	BB	Dismissed
2/2/12 9:30 AM	20	DBCK	C	DM	VR	Dismissed
1/26/12 4:30 PM	30	ADJUST30	C	DM	WD	Dismissed
1/16/12 4:30 PM	30	ADJUST30	C	DM	PL	Dismissed
12/20/11 3:15 PM	25	IMPR	C	DM		Dismissed
11/29/11 1:25 PM	15	ADJ	C	DM		Dismissed
11/21/11 5:00 PM	15	NPC	C	DM		Dismissed
11/8/11 3:20 PM	30	NPC	C	DM		Dismissed
10/12/11 2:40 PM	20	IMPR	C	DM		Dismissed
10/11/11 12:45 PM	15	ADJ	C	DM		Dismissed
Total Appointments: 59						

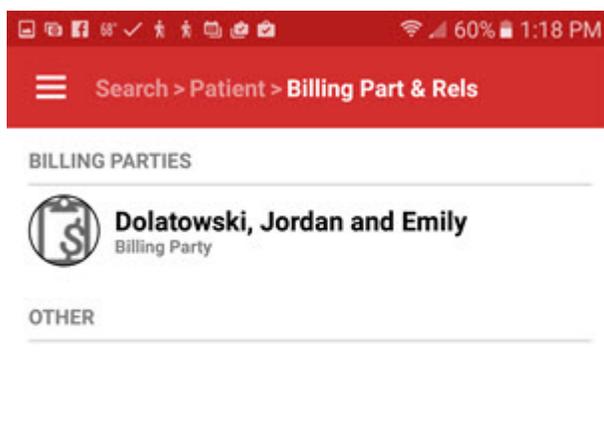
View Patient Information

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

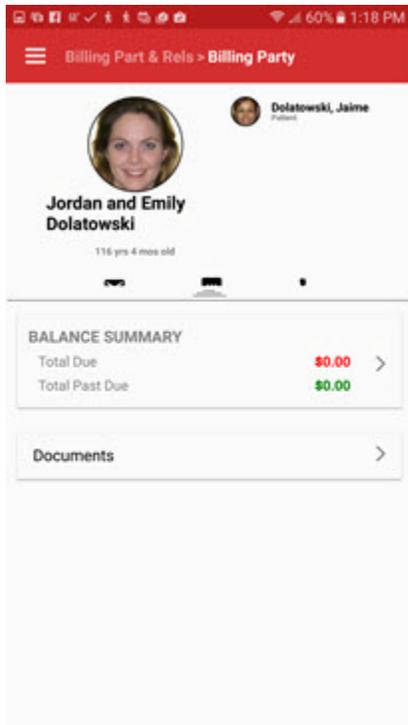
To view information about billing parties and relationships this patient has with other entries in your database:

- 1 From the [Patient](#) screen touch the [Billing Parties and Relationships>](#) text.

The following screen opens:



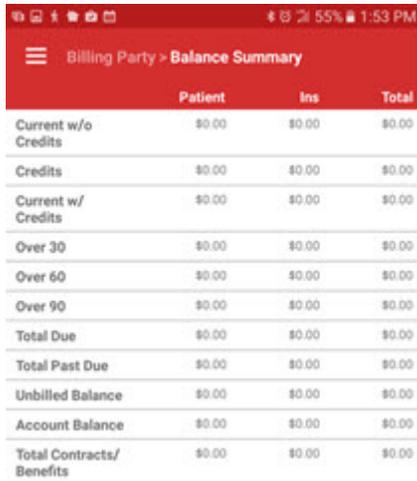
- 2 Touch the person for whom you want to view more information. (In the example below, the billing party was selected.)



- 3 Touch the envelope, messaging, or phone icons to email, send a text message, or call this billing party.
- 4 To view more demographic information about this person, touch and drag the  .
- 5 To view a balance summary for this billing party, touch the **Balance Summary** text.

The following screen opens:

View Patient Information



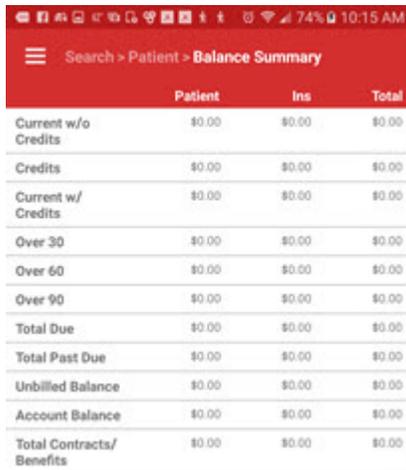
	Patient	Ins	Total
Current w/o Credits	\$0.00	\$0.00	\$0.00
Credits	\$0.00	\$0.00	\$0.00
Current w/ Credits	\$0.00	\$0.00	\$0.00
Over 30	\$0.00	\$0.00	\$0.00
Over 60	\$0.00	\$0.00	\$0.00
Over 90	\$0.00	\$0.00	\$0.00
Total Due	\$0.00	\$0.00	\$0.00
Total Past Due	\$0.00	\$0.00	\$0.00
Unbilled Balance	\$0.00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

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

To view a balance summary for this patient:

- 1 From the [Patient](#) screen, touch **Patient Balance Summary**.

The following screen opens:



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

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

Treatment Card

To access treatment card information for this patient:

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

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

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

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

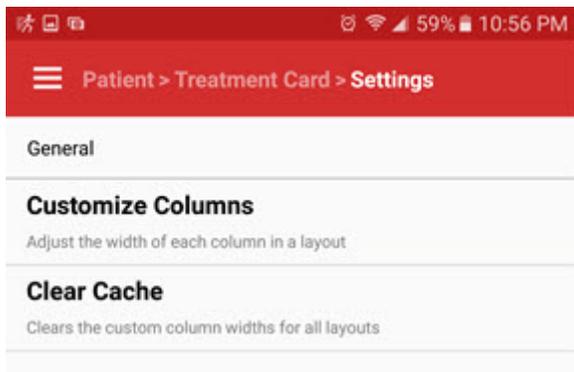
Note: If you do not see all of the treatment card fields you expect, it is because Dolphin Mobile does not display all fields automatically. This enables you to specify which fields you want to see on your mobile device. See “Dolphin Management Treatment Card Settings” on page 51.

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

To customize the width of columns on the treatment card:

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

The [Settings](#) screen opens.

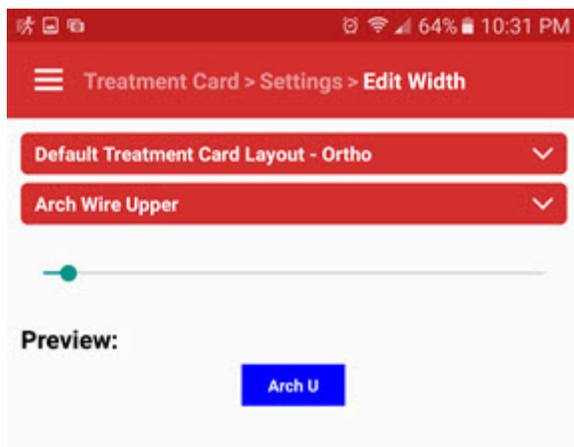


- 2 Touch **Customize Columns**.

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

- 3 Select the layout.

The **Edit Width** screen opens:



- 4 Touch the  to open a list of treatment card columns you can resize.
- 5 Touch the column you want to resize. (on the screen above, it is the Arch Wire Upper (Arch U) column.
- 6 Touch and drag the  until the column shown in the **Preview** is set to the desired width.
- 7 Repeat the previous 3 steps for each column you want to resize.
- 8 Touch **Settings>** to exit the **Edit Width** screen.

To revert to the previous column width settings:

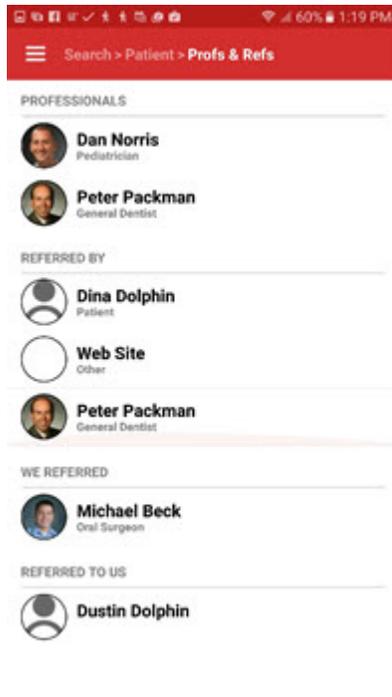
- 1 On the **Settings** screen touch **Clear Cache**.
- 2 Touch OK on the message box to clear the custom column width settings for all treatment card layouts.

- 3 Touch **Treatment Card >** to return to the patient's treatment card screen.
- 4 To return to the **Patient** screen, touch **Patient >**

To view referral information for this patient:

- 1 Touch the **Professionals and Referrals** text.

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

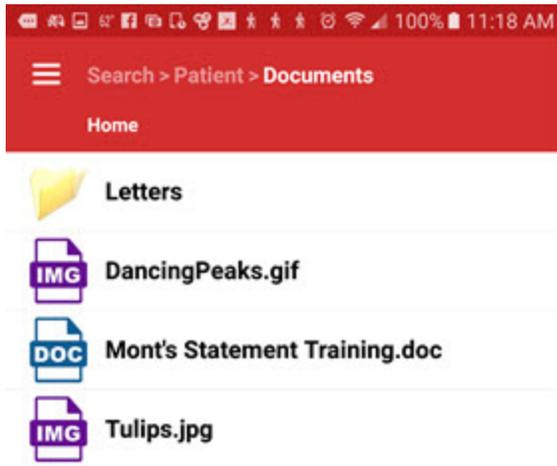


You can view documents associated with any patient, doctor, or billing party.

View Patient Information

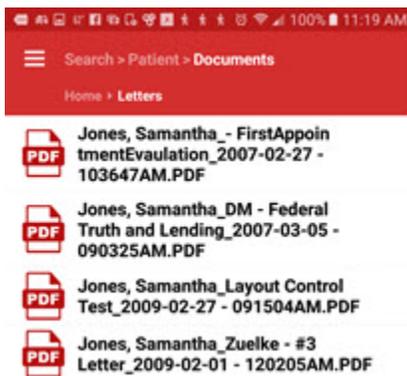
To view documents associated with this person:

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



- 2 On the **Documents** screen touch a folder to open it.

The example below shows the documents that are stored in a folder called **Letters**.



- 3 Touch the document you want to view.

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

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

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



View Doctor Information

To view doctor information from Dolphin Mobile:

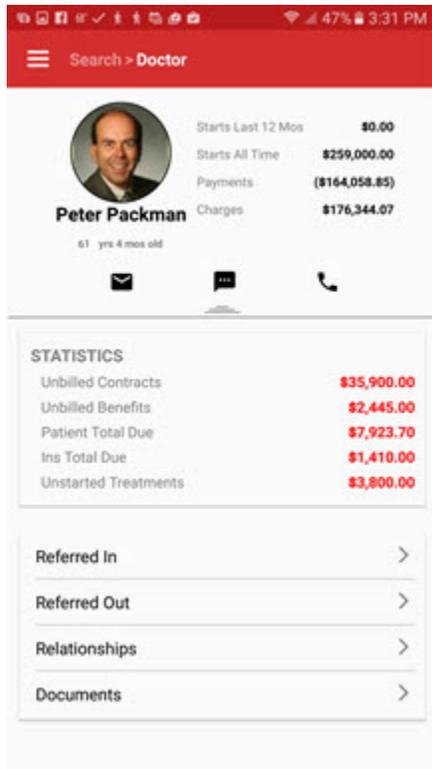
- 1 Touch the **Doctors** search box.
- 2 On the **Doctor Search** screen, touch the letters on the keypad to enter the name of the doctor you want to view.
- 3 Press the Search button on the keypad.

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

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

The Doctor screen opens:

View Doctor Information



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

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

View Billing Party Information

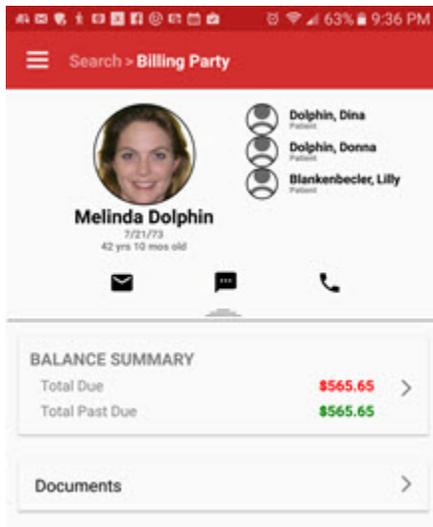
To view billing party information from Dolphin Mobile:

- 1 From the main Dolphin Mobile screen, touch the  button.
- 2 Touch **Billing Parties** from the displayed menu.

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

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

The **Billing Party** screen opens:

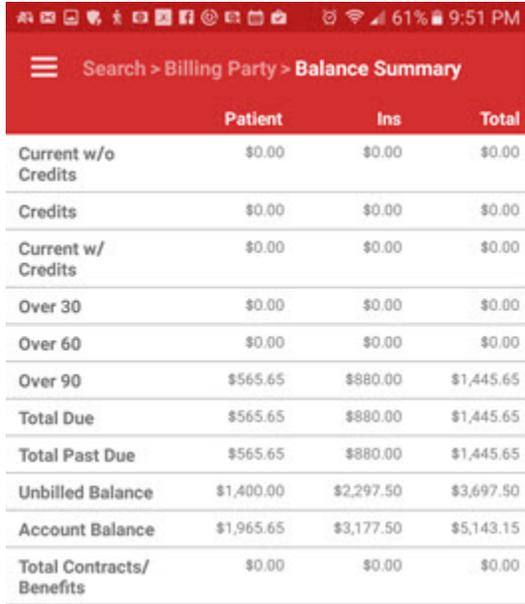


Relationships this person has with other entities in Dolphin Management are shown in the upper right corner of the screen.

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

The following screen opens:

Access the Schedule



The screenshot shows a mobile application interface with a red header bar. The header contains a hamburger menu icon, the text "Search > Billing Party > Balance Summary", and a status bar at the top with various icons, signal strength, 61% battery, and 9:51 PM. Below the header is a table with four columns: Patient, Ins, and Total. The table lists various financial categories and their corresponding values.

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

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

Access the Schedule

To access your office schedule from Dolphin Mobile:

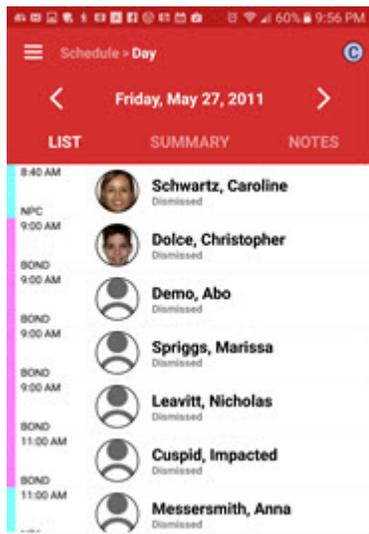
- 1 From the main Dolphin Mobile screen, touch the  **Schedule** icon.

The following screen is opens:



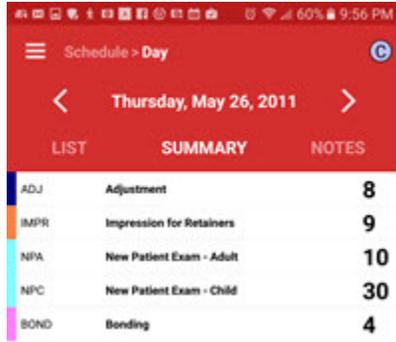
2. Navigate by doing any of the following:
 - Touch the < or > to go to the previous or next month, respectively.
 - Touch **Tomorrow** to go to tomorrow.
 - Touch **Today** to go to today's date.
 - Touch any day to go to the schedule for that day

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



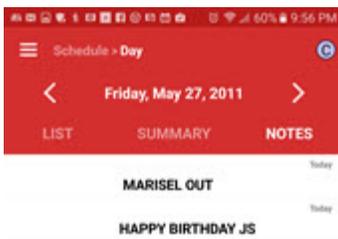
3. Optional: Touch **SUMMARY** to view a summary of appointments for that day, sorted by appointment type:

Access the Schedule

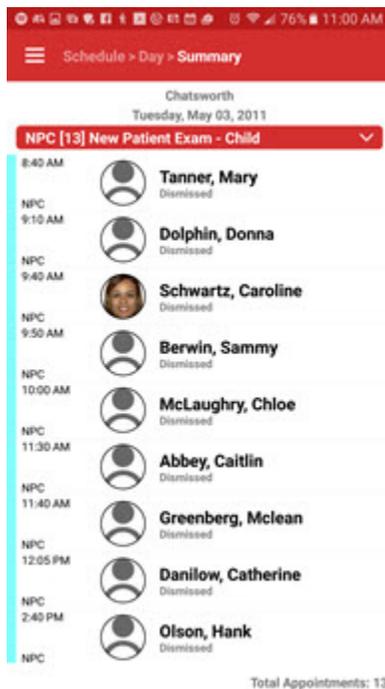


	LIST	SUMMARY	NOTES
ADJ		Adjustment	8
IMPR		Impression for Retainers	9
NPA		New Patient Exam - Adult	10
NPC		New Patient Exam - Child	30
BOND		Bonding	4

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



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



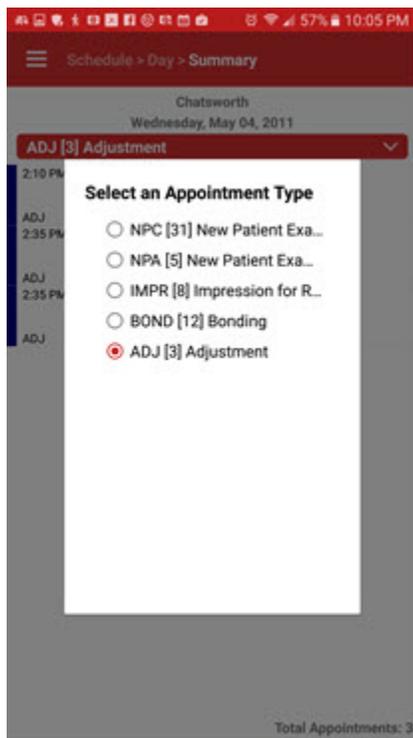
Chatsworth
Tuesday, May 03, 2011

NPC [13] New Patient Exam - Child

8:40 AM		Tanner, Mary Dismissed
NPC 9:10 AM		Dolphin, Donna Dismissed
NPC 9:40 AM		Schwartz, Caroline Dismissed
NPC 9:50 AM		Berwin, Sammy Dismissed
NPC 10:00 AM		McLaughry, Chloe Dismissed
NPC 11:30 AM		Abbey, Caitlin Dismissed
NPC 11:40 AM		Greenberg, Mclean Dismissed
NPC 12:05 PM		Danilow, Catherine Dismissed
NPC 2:40 PM		Olson, Hank Dismissed

Total Appointments: 13

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



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

Using Care Call

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

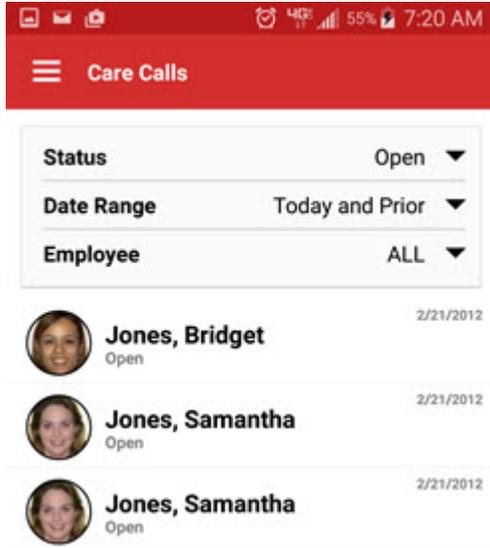
When you assign a care call from Dolphin Management, that care call is added to the treatment card notes.

To use Care Call:

- 1 From the Dolphin Mobile main screen, touch the  Care Calls icon.

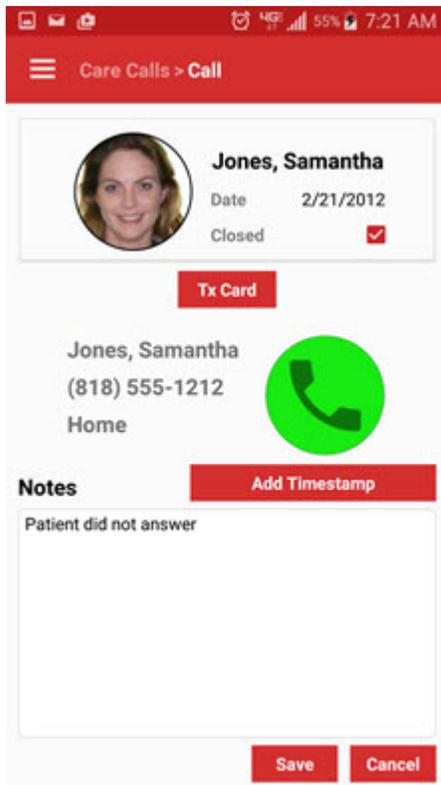
The following screen is opens:

Using Care Call



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

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



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

- Touch the patient image to view more detailed patient information.
 - Touch the **Tx Card** button to view this patient's treatment card.
 - Touch the phone number to view a list of this patient's other contact numbers (If you are using a device enabled to make calls, you can touch the  button to make a call or add this number to your device's contact list.
 - Close the care call
- 5 Touch the **Save** button to save the care call.

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

Using Questionnaire

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

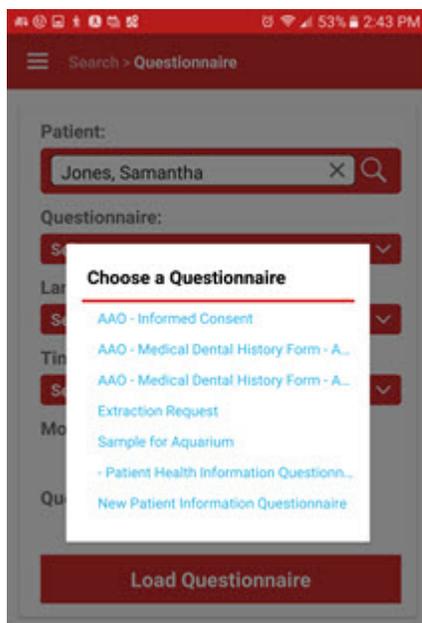
To access a questionnaire:

- 1 From the Dolphin Mobile main screen touch .
- 2 From the displayed list, touch **Questionnaire**.

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

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

A list of available questionnaires is displayed.



- 4 Touch the questionnaire you want to view.

Using Questionnaire

- 5 Choose a language style (Layman Adult, Clinical, Layman, or Dentist) when prompted.
- 6 Choose a time point when prompted.

The screenshot shows the 'Questionnaire' screen in a mobile application. At the top, there is a red header with a search icon and the text 'Search > Questionnaire'. Below this, the 'Patient' field is filled with 'Jones, Samantha'. The 'Questionnaire' dropdown menu is set to 'AAO - Informed Consent'. The 'Language Style' dropdown menu is set to 'Layman Adult'. The 'Timepoint' dropdown menu is set to '3/23/12 - Progress'. The 'Mode' section has two radio buttons: 'Staff' (which is selected) and 'Patient'. The 'Questions Per Page' section has four radio buttons: '1', '3' (which is selected), '5', and '10'. At the bottom of the form is a red button labeled 'Load Questionnaire'.

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

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

Staff Mode

Please complete the Questionnaire.

Extraction Request

Extractions

- Extract upper first premolars: 5, 12
- Extract upper second premolars: 4, 13
- Extract lower first premolars: 21, 28
- Extract lower second premolars: 20, 29
- Extract upper third molars
- Extract lower third molars
- Early extraction of primary teeth:
-
- Extract upper second molars: 2, 15
- Extract one incisor: {}
- Serial extraction procedures

Save **Sign** **X**

- 10 Complete the questionnaire on the mobile device.
- 11 Touch **Sign** to sign the questionnaire.
- 12 When finished, click **Submit**.

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

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

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

Using Capture

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

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

Using Capture

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

To use Capture:

- 1 From the Dolphin Mobile main screen touch .
- 2 From the displayed list, touch **Tx Card Image Capture**.
- 3 If your server has multiple locations, select the location if prompted.

The device camera opens.

- 4 Take the picture.
- 5 Click **OK** to save the image to your Dolphin server.

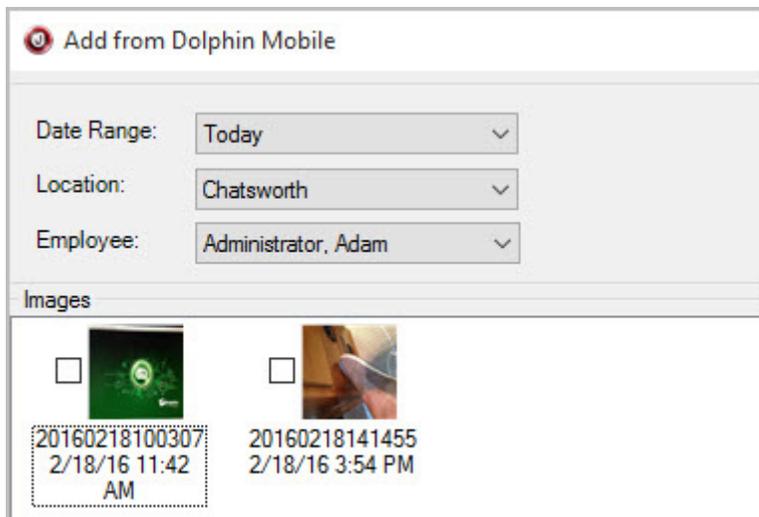
The image is saved.

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

- 1 In Dolphin Management, open the treatment card for the patient.
- 2 On the visit or emergency entry, click the image icon in the **Images (non-Dolphin Imaging)** column.

The **Entity Images** dialog box opens.

- 3 Click the **Add from Mobile** button.



The image or images you just captured are displayed in the **Images** group box.

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

Date Range Date the image was captured (defaults to today)

Location The location selected when the image was captured (defaults to logged-in location)

Employee

The employee logged in to Dolphin Mobile who captured the image (defaults to logged-in employee)

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

Images open in the **Entry Images** dialog box, where you can edit them if necessary.

- 6 Click **OK**.

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



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

This chapter describes how you can call, text, email, or capture an image of an entity in your database.

Call a Patient, Doctor or Billing Party

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

To call a patient, doctor, or billing party:

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

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

Text a Patient, Doctor or Billing Party

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

To text a patient, doctor, or billing party:

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

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

Send Email

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

To email a patient, doctor, or billing party:

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

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

- 2 Enter text for the subject and body of the message.
- 3 Touch the **Send** button.

Capture Entity Images

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

To capture and assign an image to an entity in your database:

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

This opens the camera app on your device

- 2 Take the picture.
- 3 Do one of the following:
 - Touch RETRY to take the picture again
 - Touch OK to save this picture as the new default image for this person.
 - Touch the device Back button or Cancel button to exit the camera app and keep the existing image of this person.

Using Dolphin Mobile with Dolphin Aquarium

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

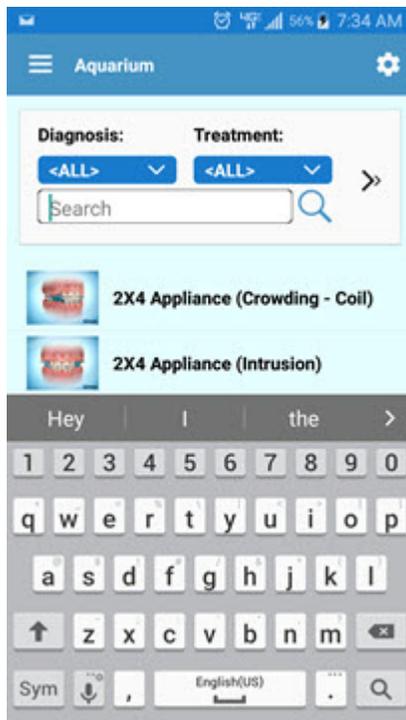
The instructions here apply whether you use Dolphin Aquarium only or if you have one or more other Dolphin products installed.

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

To access Dolphin Aquarium:

- 1 From the Dolphin Mobile home screen, touch  Aquarium .

The Dolphin Aquarium main screen opens:



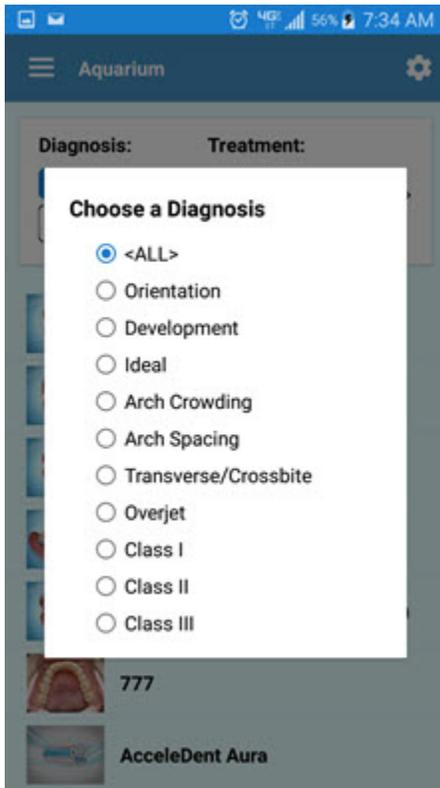
From the main screen you can:

- Filter which media you see by Diagnoses, Treatment, Aquarium Library or any keyword you enter in the search window.
- Play Aquarium movie clips and view stills
- Play Aquarium playlists

To filter the Aquarium library by treatment or diagnosis types:

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

The following image shows the options under Diagnosis:



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

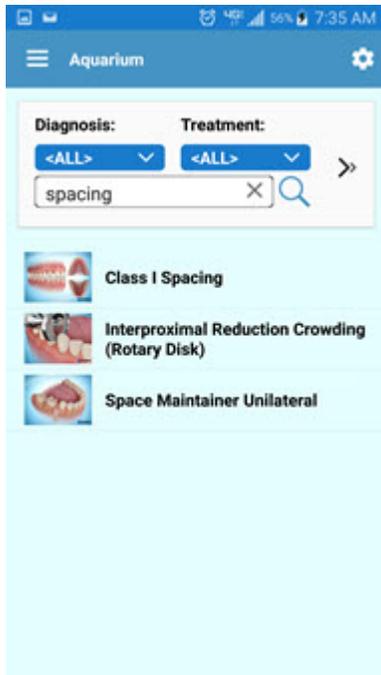
To search the Aquarium library based on a keyword:

- 1 Touch the Search text box:



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

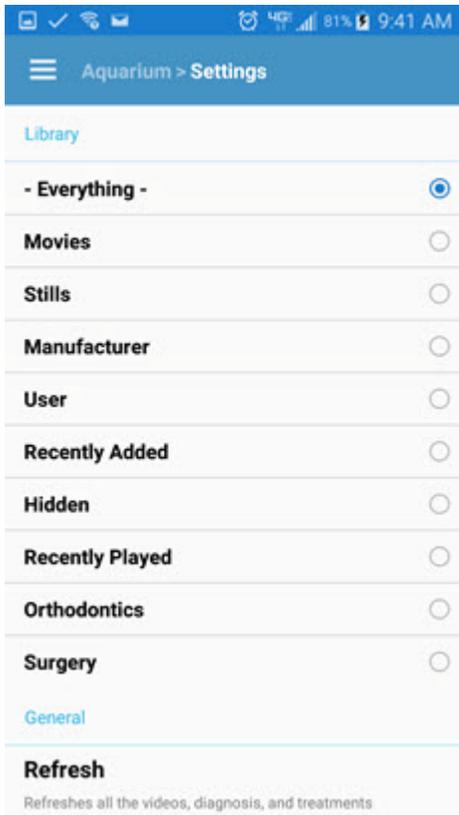
The following image shows what is displayed when you search on the word “spacing.”



To filter the Aquarium library by topic:

- 1 Touch the  button.

A list of your libraries is displayed.



- 2 To select any of these libraries, simply touch the option and you will be returned to the Aquarium page.

To play a movie clip or view a still:

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

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

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



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



Touch to pause or resume play.



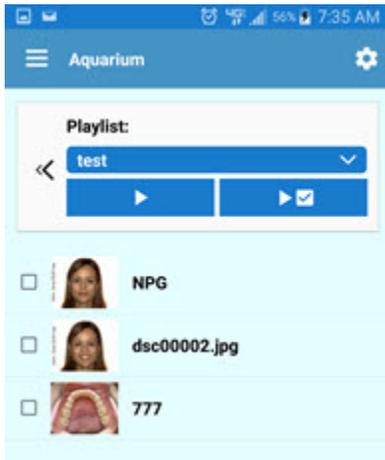
Touch to skip forward.



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

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

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



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



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



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



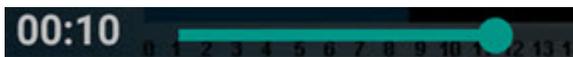
Touch to pause or resume play



Touch to skip forward.



Touch to skip to the beginning of the next movie.



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

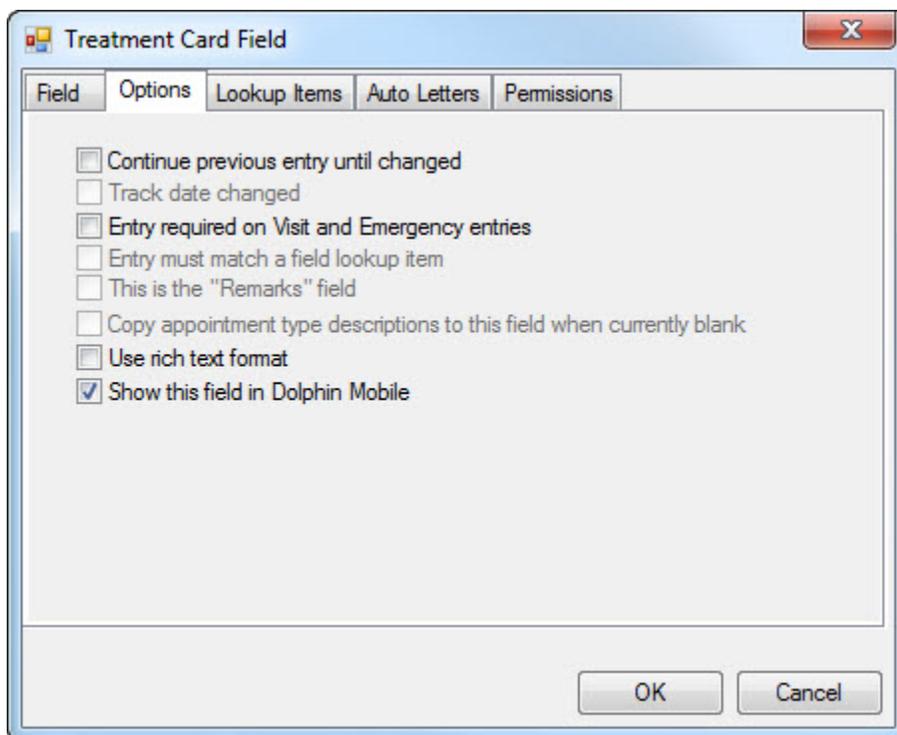
Customizing

Dolphin Management Treatment Card Settings

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

From a workstation running Dolphin Management:

- 1 From the **Edit** menu, select **Treatment->Treatment Card Setup**.
- 2 On the **Layouts** tab, select a layout, and click the **Edit** button.
- 3 On the **Treatment Card Layout** dialog box, select the field you want to be visible in Dolphin Mobile.
- 4 Click the **Edit** button.
- 5 On the **Treatment Card Field** dialog box, click the **Options** tab.
- 6 Check the box next to **Show this field in Dolphin Mobile**.



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

