MANUAL BOOK AALTO

A. DENTAL MONITORING PARTNER

1. CREATE PRACTICE & DOCTOR

Partner Monitoring System Access Manual

1. Click the Doctor menu.
2. Select Practice.
3. Complete the practice profile information, then click Save.

A. MONITORING PARTNER

1. CREATE PRACTICE & DOCTOR

Doctor Setup
1. Click the Doctor menu.
2. Select Doctor.
3. Complete the doctor profile information.
4. Select the practice that has been created.
5. Click Save.

A. MONITORING PARTNER
1. CREATE PRACTICE & DOCTOR

Protocol Management
1. Select one doctor from the list.
2. Click Manage Protocol.
3. Click Create New Protocol.
4. Enter the protocol data, then click Save.

A. MONITORING PARTNER
1. CREATE PRACTICE & DOCTOR

Quickstart Setup
1. Select the Quickstart menu.
2. Click New Quickstart.
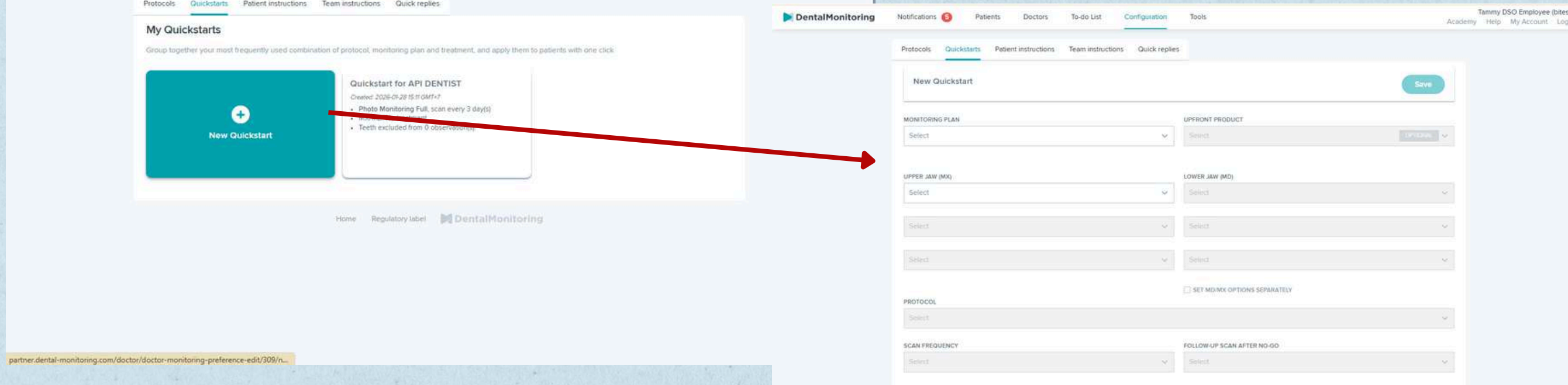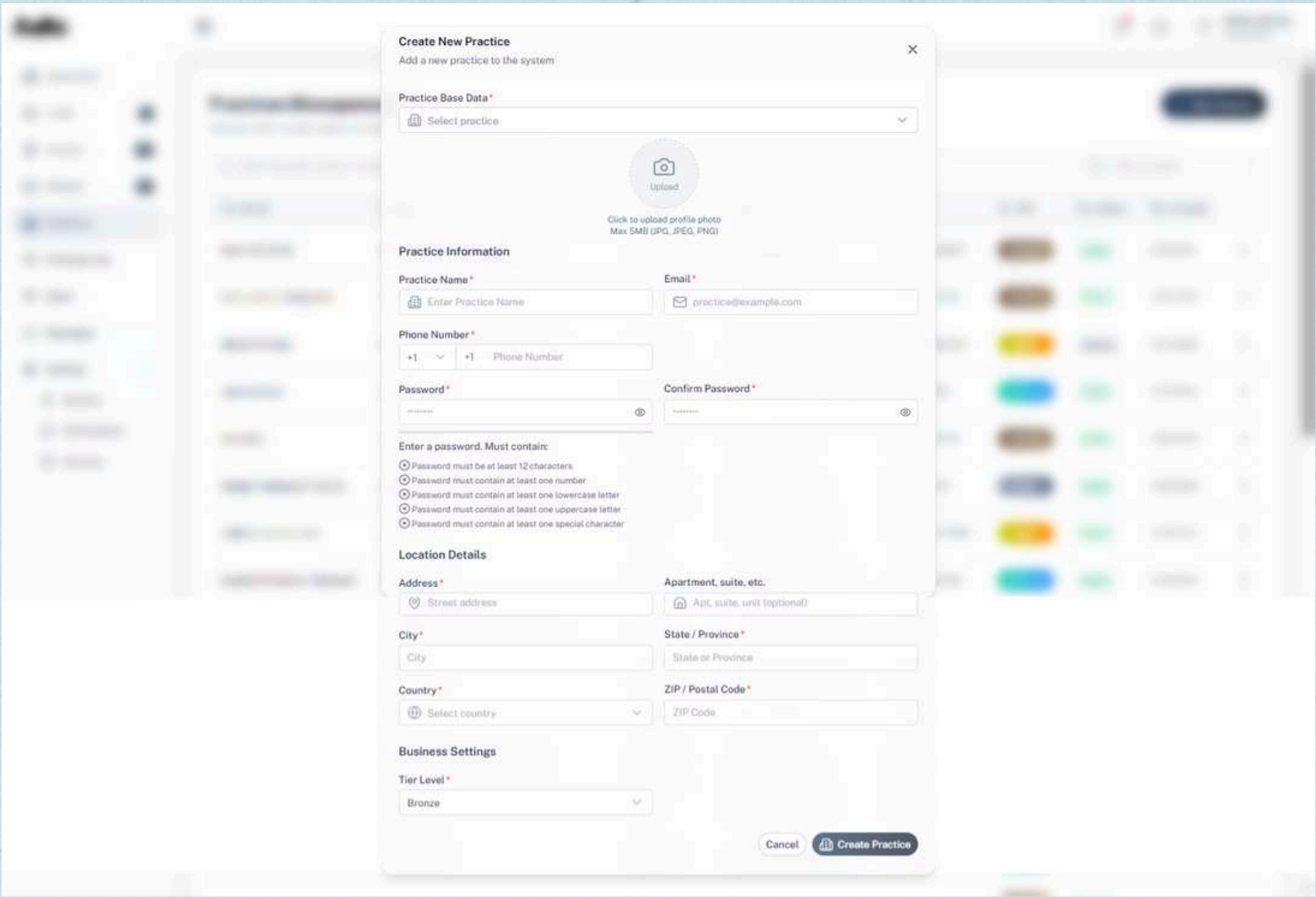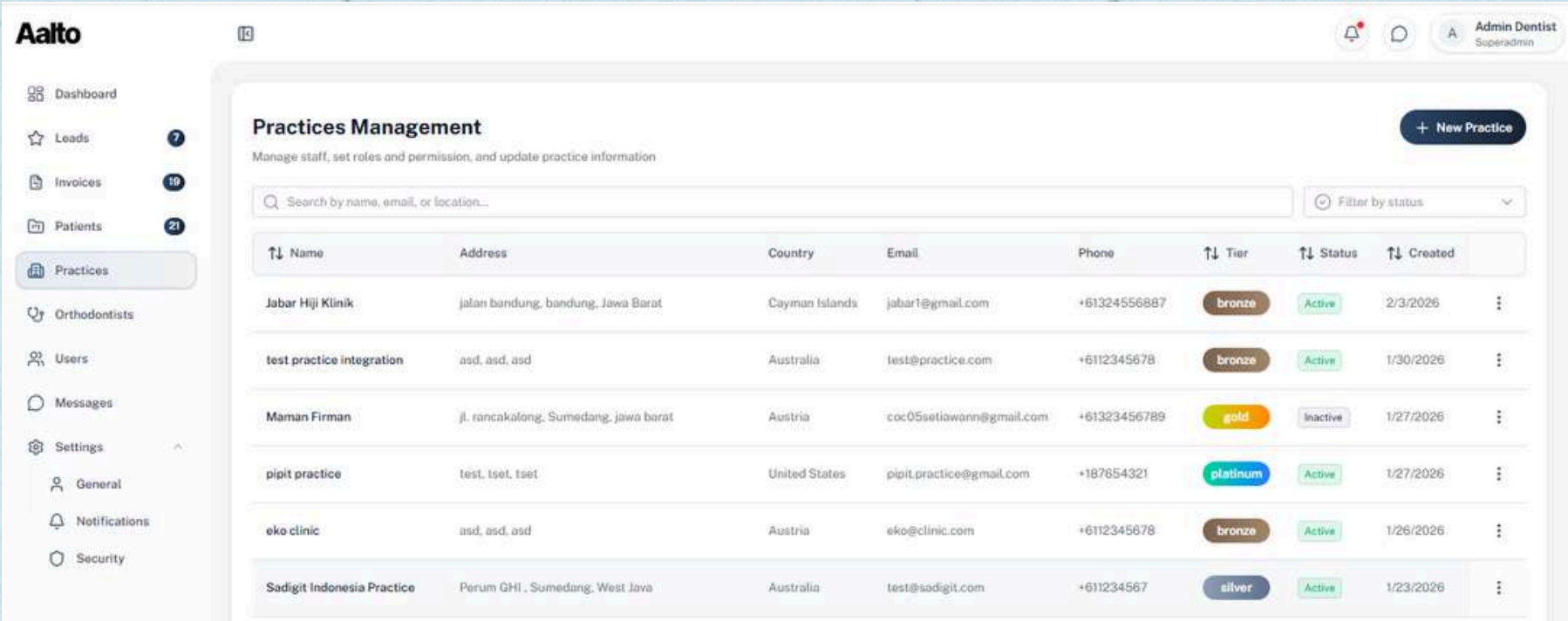3. Select a protocol and choose a treatment.
4. Click Save.
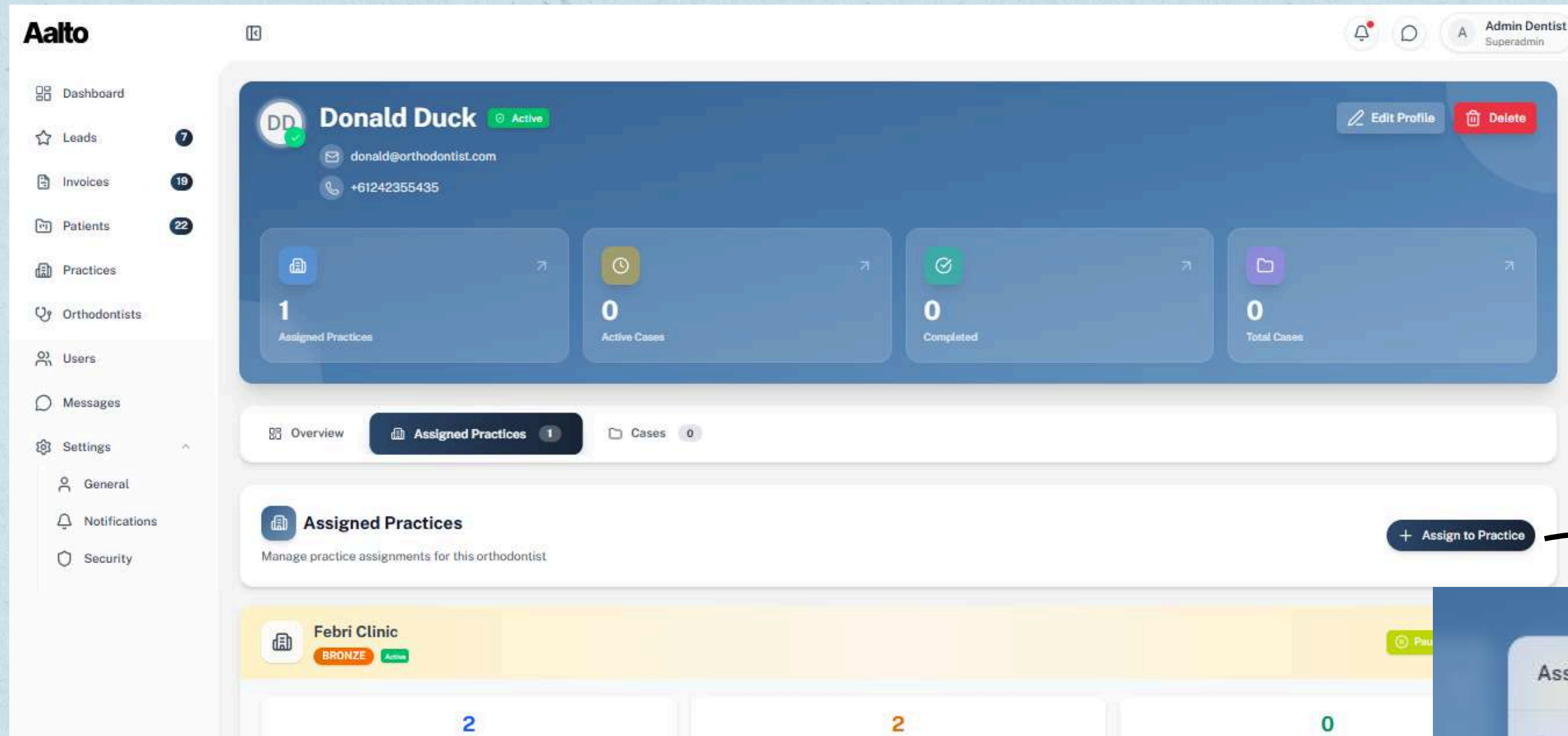
B. AALTO
1. CREATE PRACTICE
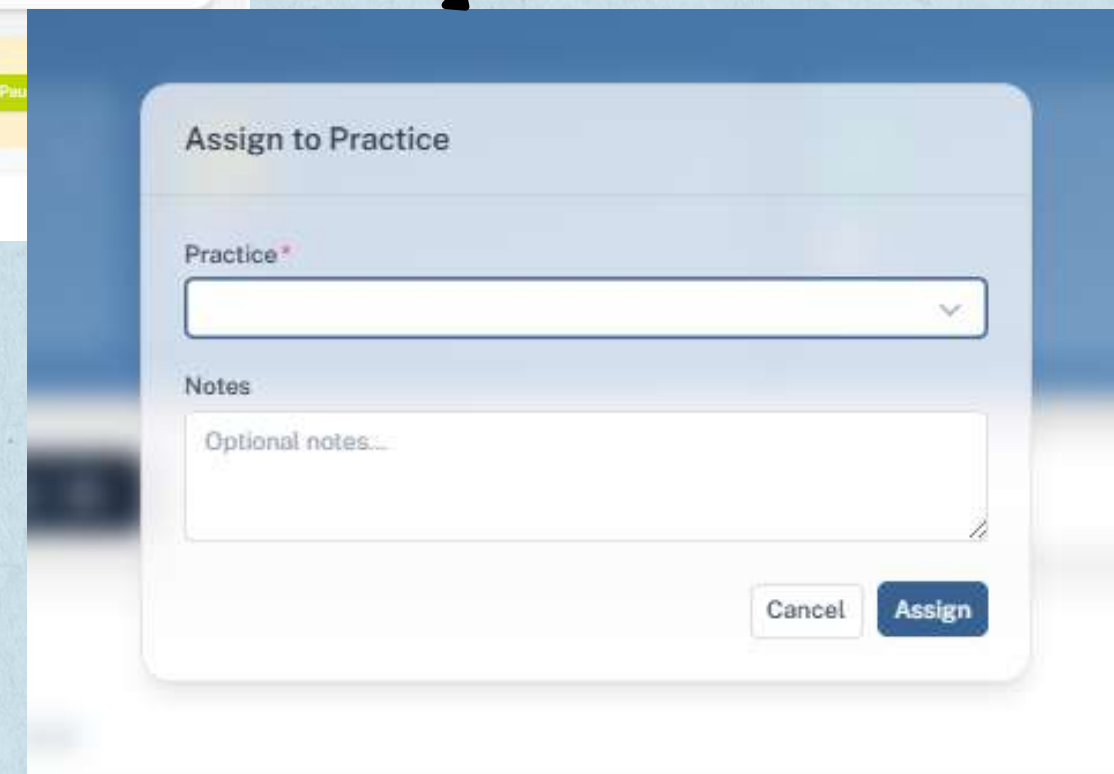

AALTO System Access
1. Log in to the AALTO system.
2. Select the Practice menu.
3. Click Create New Practice.
4. Complete the practice information.
5. Click Create Practice.

B. AALTO
1. CREATE PRACTICE

Open the Practice item, then click
Assigned Practice.
 Select the doctor, then click Assign.

B. AALTO
1. CREATE PRACTICE

Practice Management
1. Select a practice.
2. Click the three-dot (⋮) menu.
3. Select Action.
4. Choose one of the following options:
   - View Detail to view practice information.
   - Edit Practice to update practice data, then click Update Information.
   - Deactivate to disable the practice.
   - Delete Practice to remove the practice.

B. AALTO
1. CREATE ORTHODONTIST

1. Select the Orthodontist menu.
2. Click Create New Orthodontist.
3. Complete the orthodontist information, then click Create Orthodontist.
4. Click the three-dot (⋮) action menu:
5. View Detail to display orthodontist information.
6. Deactivate to disable the doctor.
7. Delete Doctor to remove the doctor data.

B. AALTO
1. CREATE USER
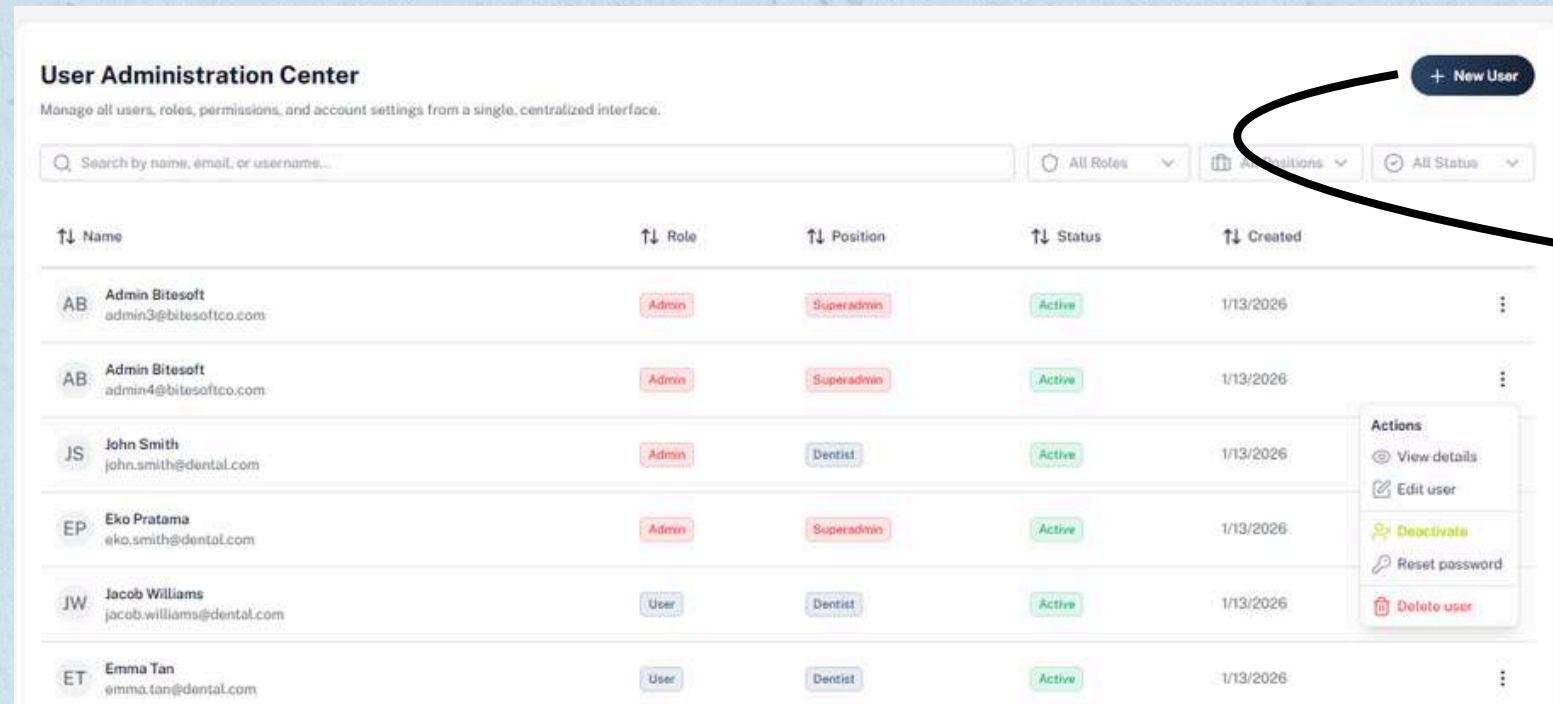
User Actions
1. Select a user from the list.
2. Click the three-dot (⋮) action menu.
3. Choose one of the following options:
4. View Details to display user information.
5. Edit User, update the data, then click Update Information.
6. Deactivate to disable the user.
7. Reset Password to change the password. The reset link will be sent to the user's registered email address.
8. Delete User to permanently remove the user data.
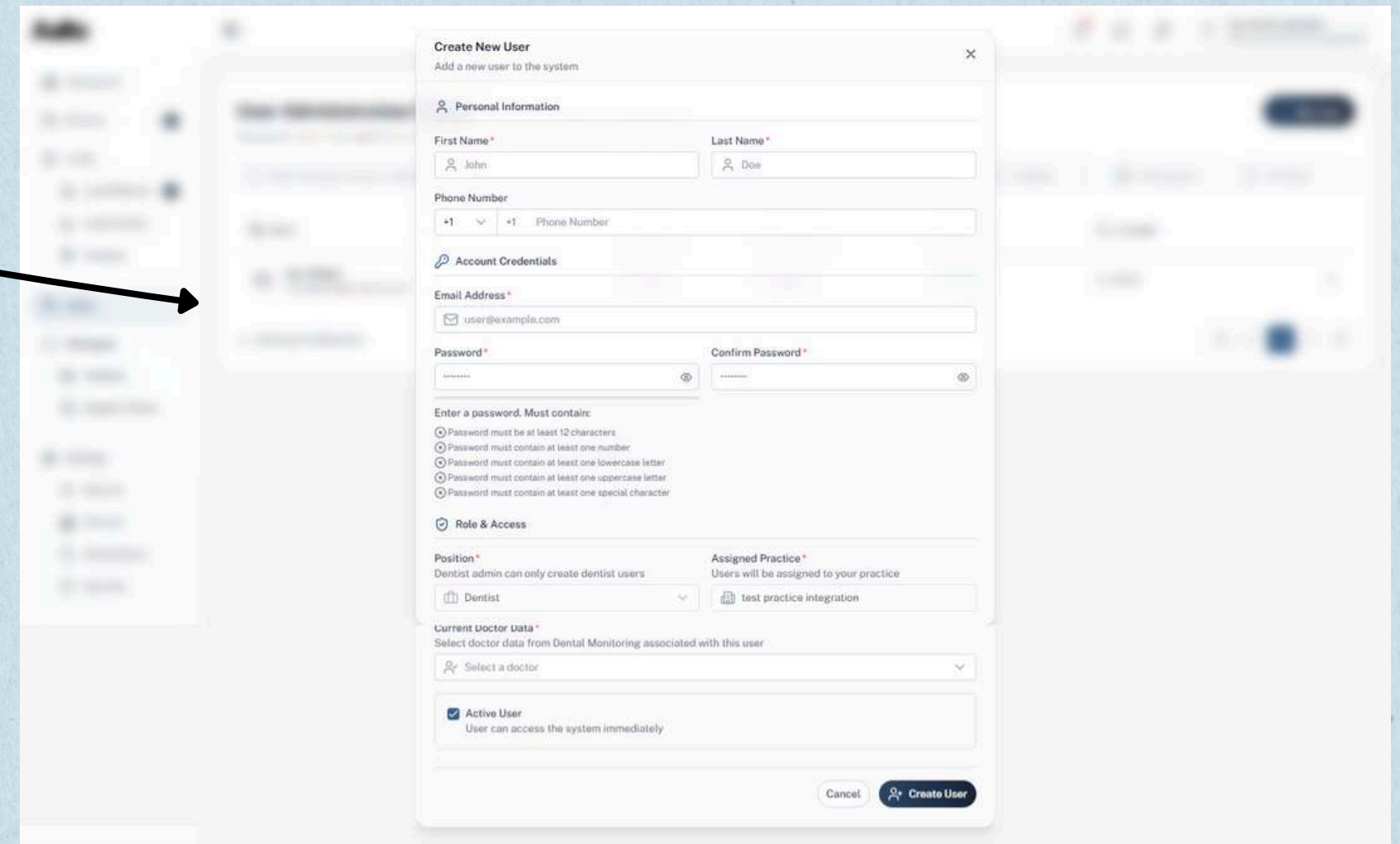
User Management
1. Select the User menu.
2. Click Create New User.
3. Complete the user information.
4. Select the role and access level.
5. Select a doctor from Dental Monitoring.
6. Click Create User.

B. AALTO
1. CREATE LEAD PATIENT (ACCOUNT ADMIN)

1. Select the Lead Patient menu.
2. Click Create Lead.
3. Complete the lead information and medical history.
4. Click Create Lead to save.

B. AALTO
1. CREATE PATIENT (ACCOUNT DOCTOR)

1. Create Patient Case (Doctor Account)
2. Select the Patient menu.
3. Click Create New Patient.
4. Complete the following information:
5. Basic Information
6. Medical History
7. Treatment Goal
8. Diagnostic Materials
9. Click Create Patient.

B. AALTO
1. ACCEPTED LEAD & BOOK APPOINTMENT
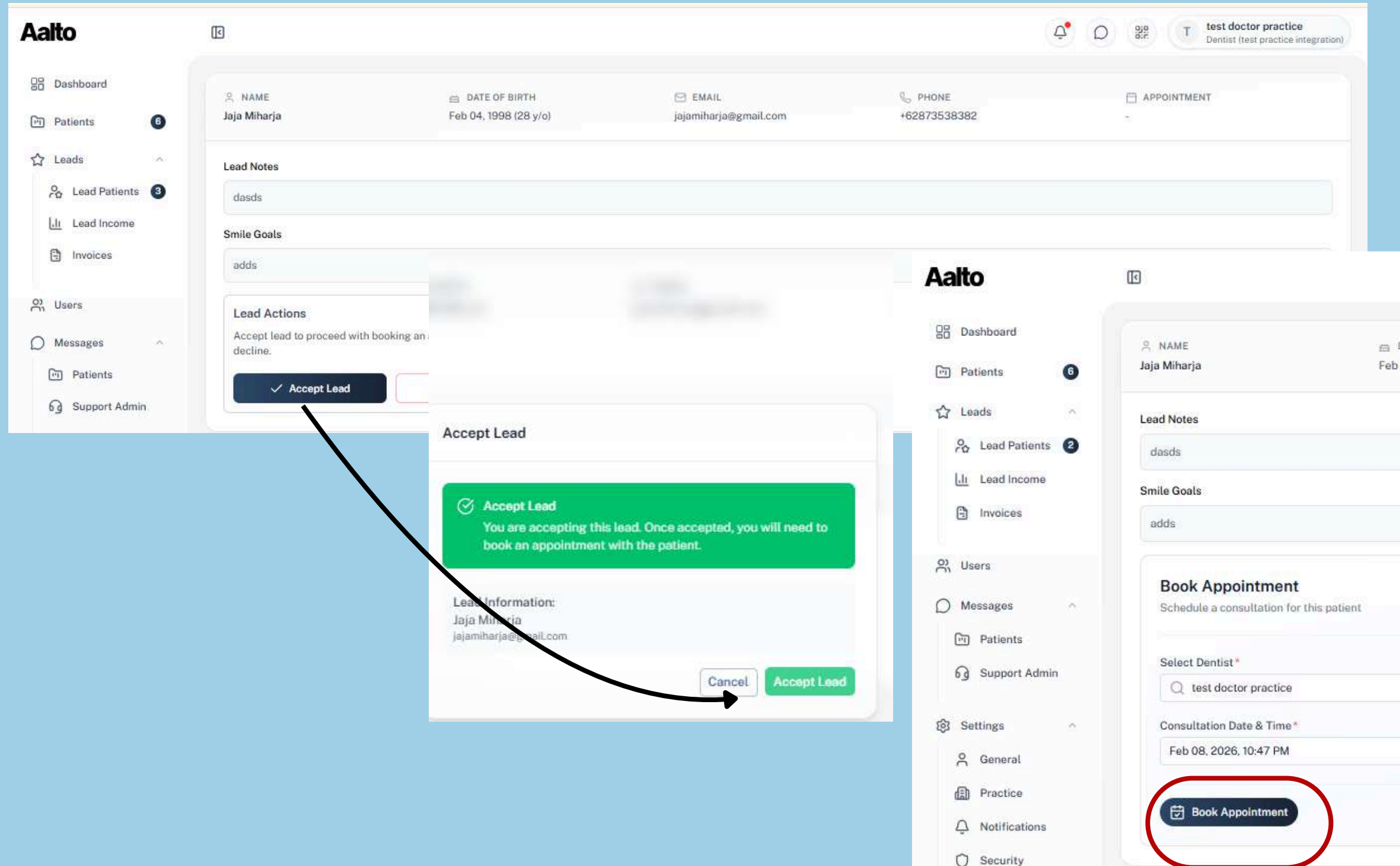
1. Accept Lead Patient (Doctor)
2. Log in as Doctor.
3. Select Lead Patient.
4. Click Accept Lead.
5. Confirm acceptance.
6. Select the doctor and booking date.
7. Click Booking Appointment.
8. Complete the Treatment Goal and Diagnostic Materials.
9. Click Update Information.

B. AALTO
1. APPROVAL BY ORTHODONTIST

1. Select a case to open the Case View.
2. If clarification is required, click Need Clarification and send a request.
3. Click Approve Treatment or Reject.
4. If all data is complete and correct, select Write Summary.

B. AALTO

1. BOOK APPOITMENT

1. Resubmit Case Information (Doctor)
2. Log in to the Doctor account.
3. Open the case that requires resubmission.
4. Complete the requested information.
5. Click Update Information.

B. AALTO
1. APPROVE BY ORTHODONTIST

1. Review by Orthodontist
2. Log in as Orthodontist.
3. Review the updated case.
4. If approved, click Send to Dentist.
5. Case status can be tracked in the Case Tracker as Treatment Plan Approved and Review Approval.

B. AALTO

1. APPROVE BY ORTHODONTIST
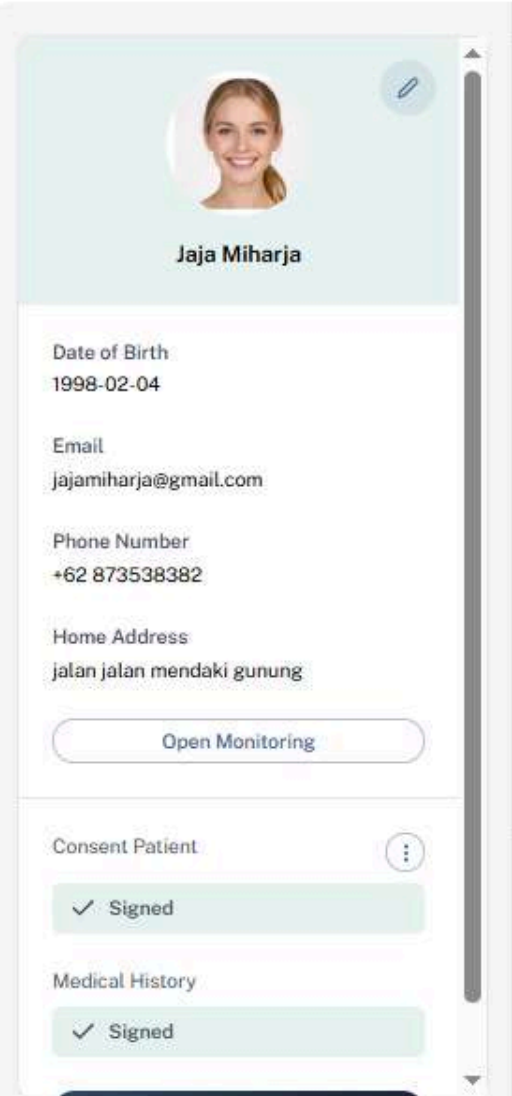
- Case status can be tracked in the Case Tracker as Treatment Plan Approved and Review Approval.

B. AALTO
1. AALTO AI SUMMARIES

1. Generate Summaries Using AI
2. Treatment Summaries
3. Select Treatment Summaries.
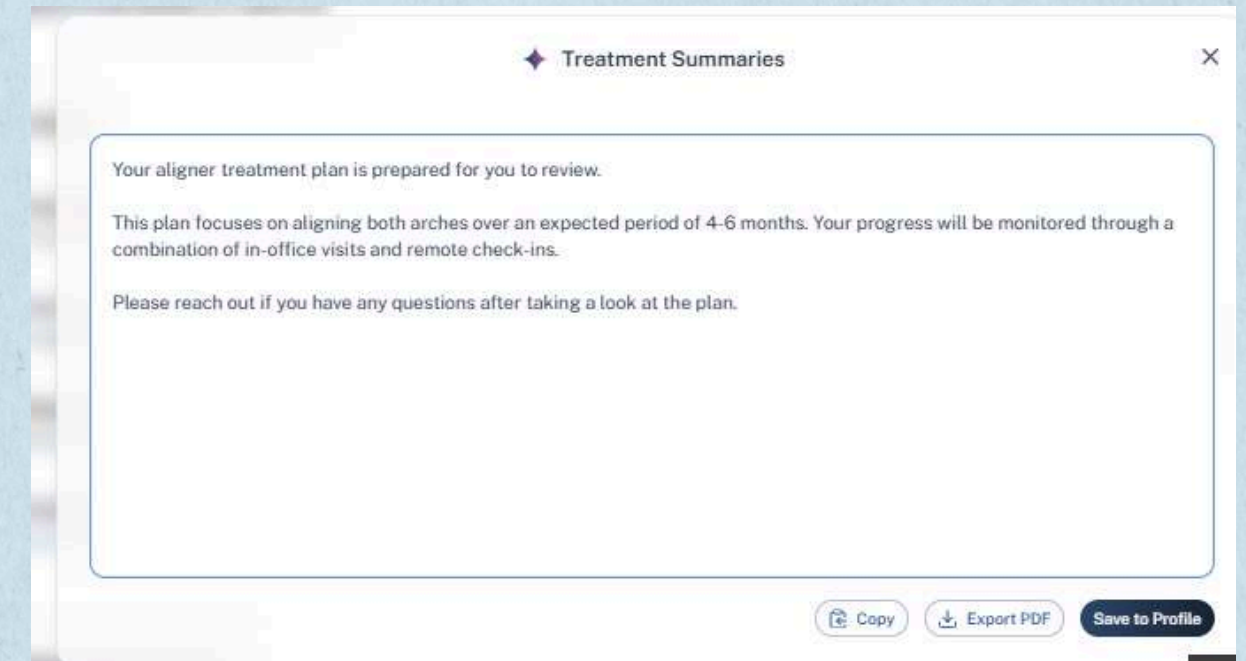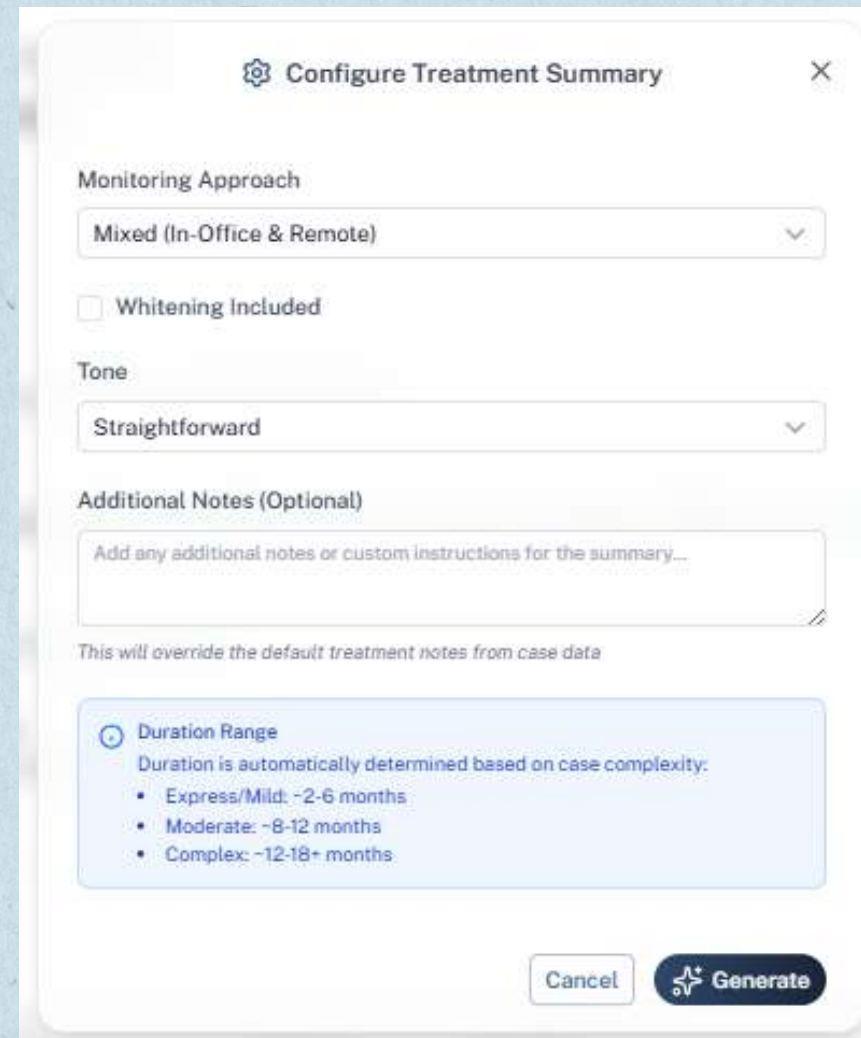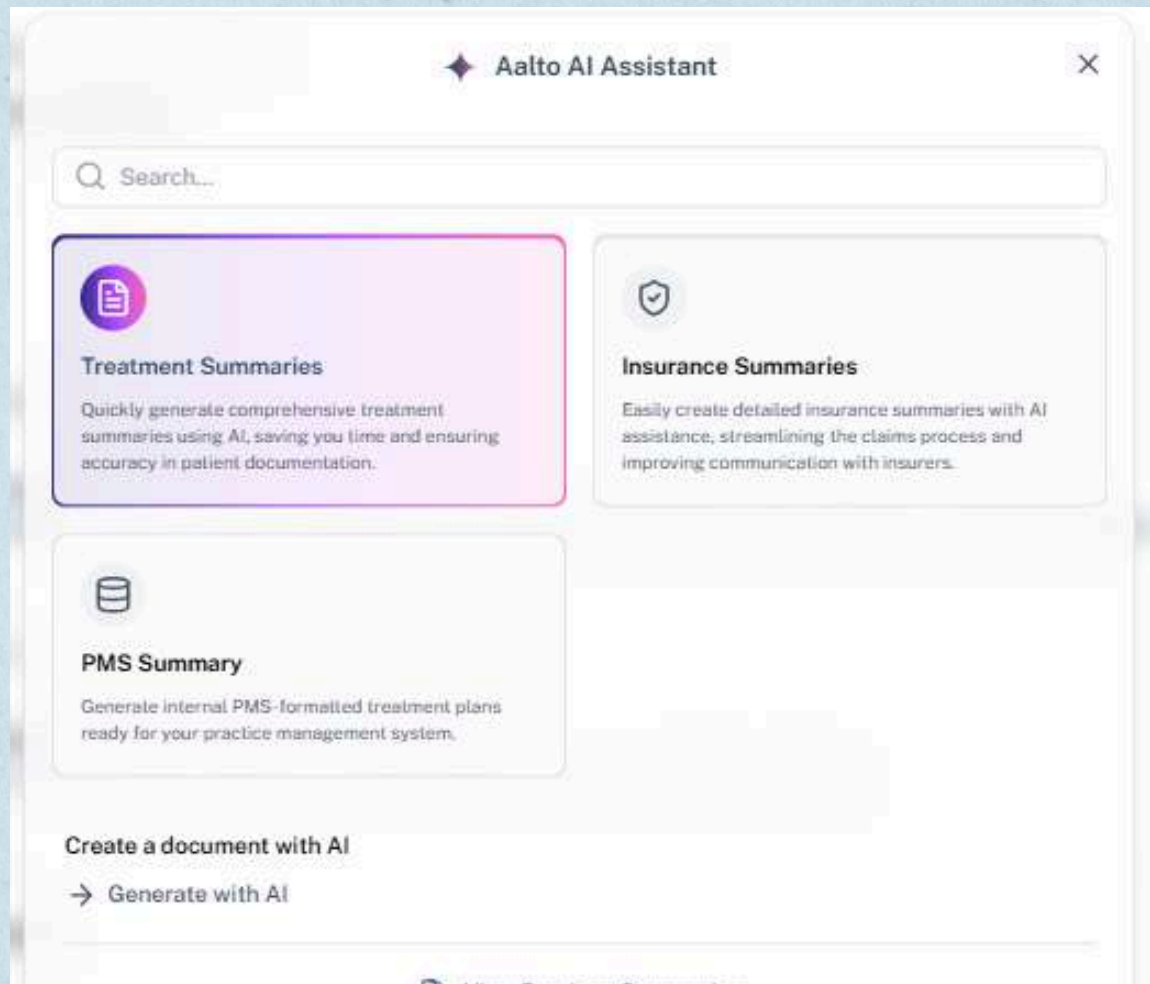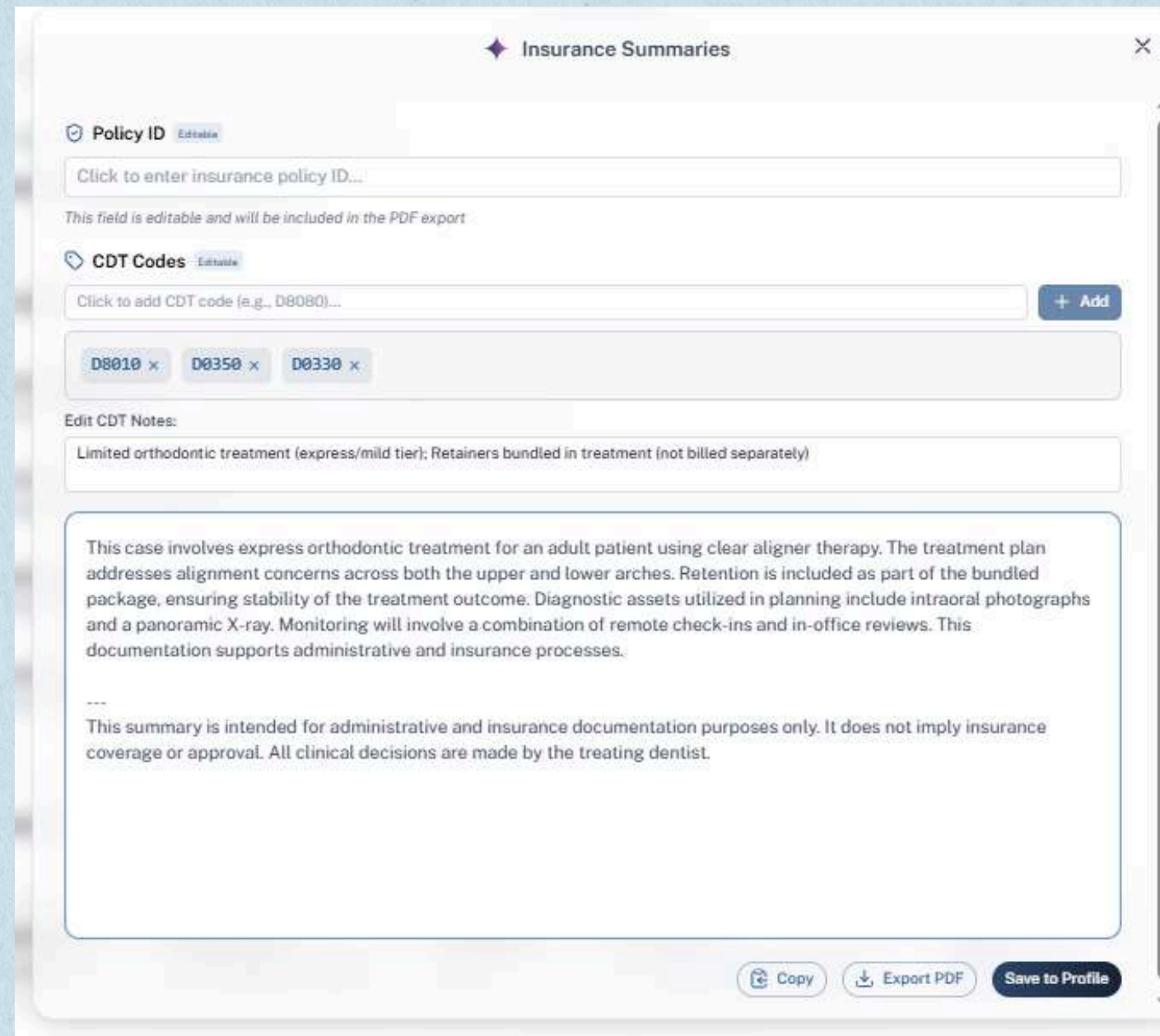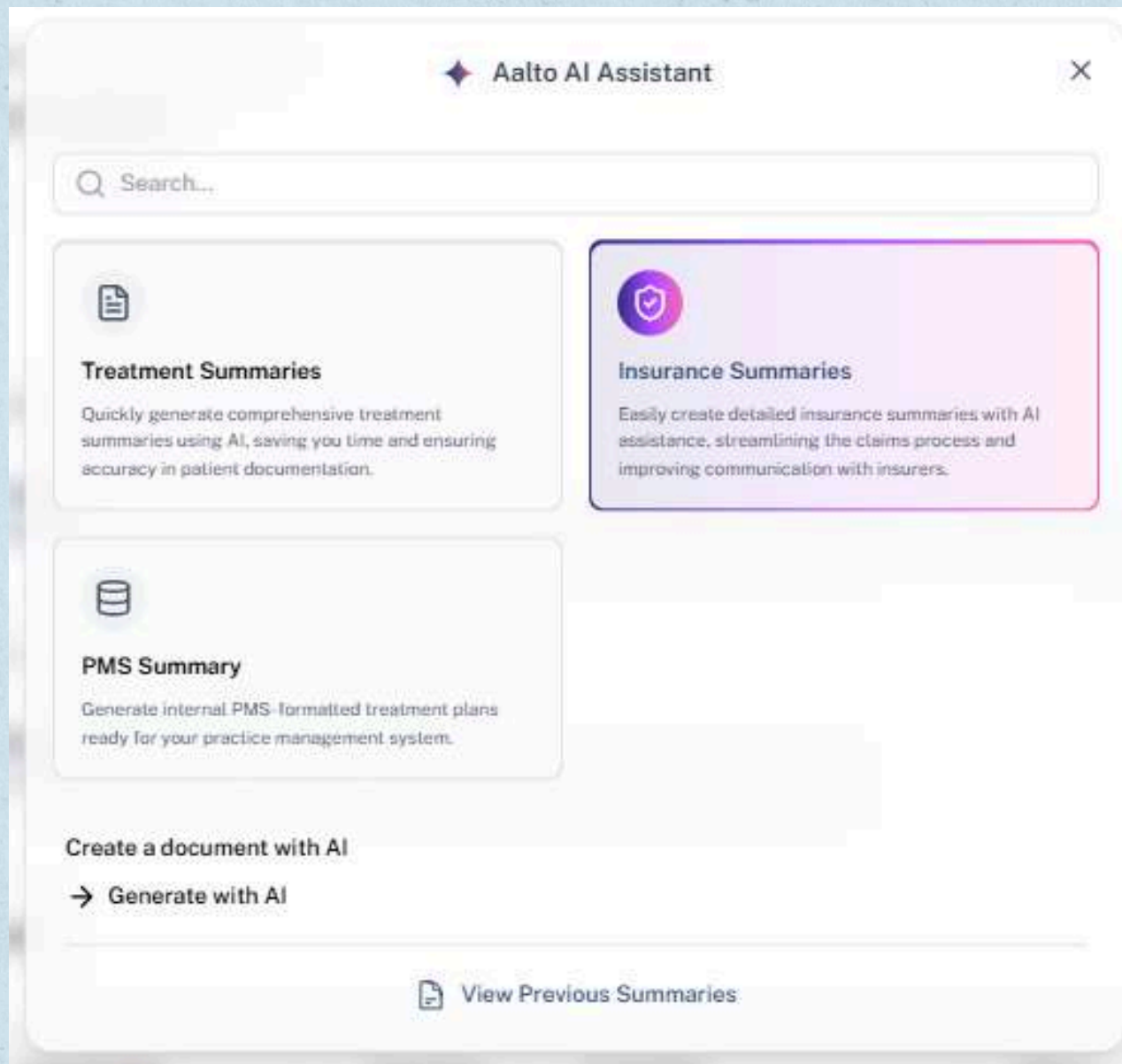4. Complete the required information.
5. Click Generate.
6. The AI-generated treatment summary will appear.
7. Click Save to Profile or Copy.
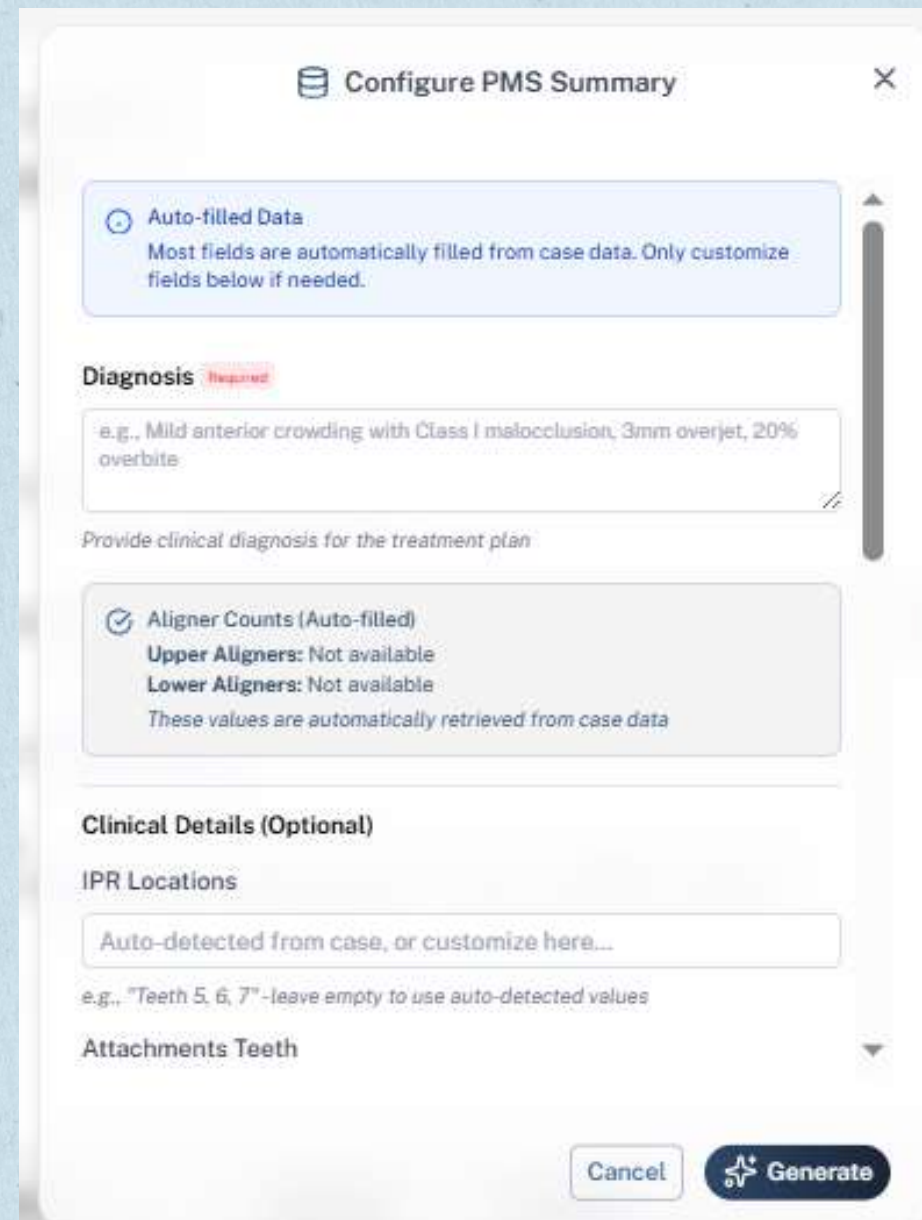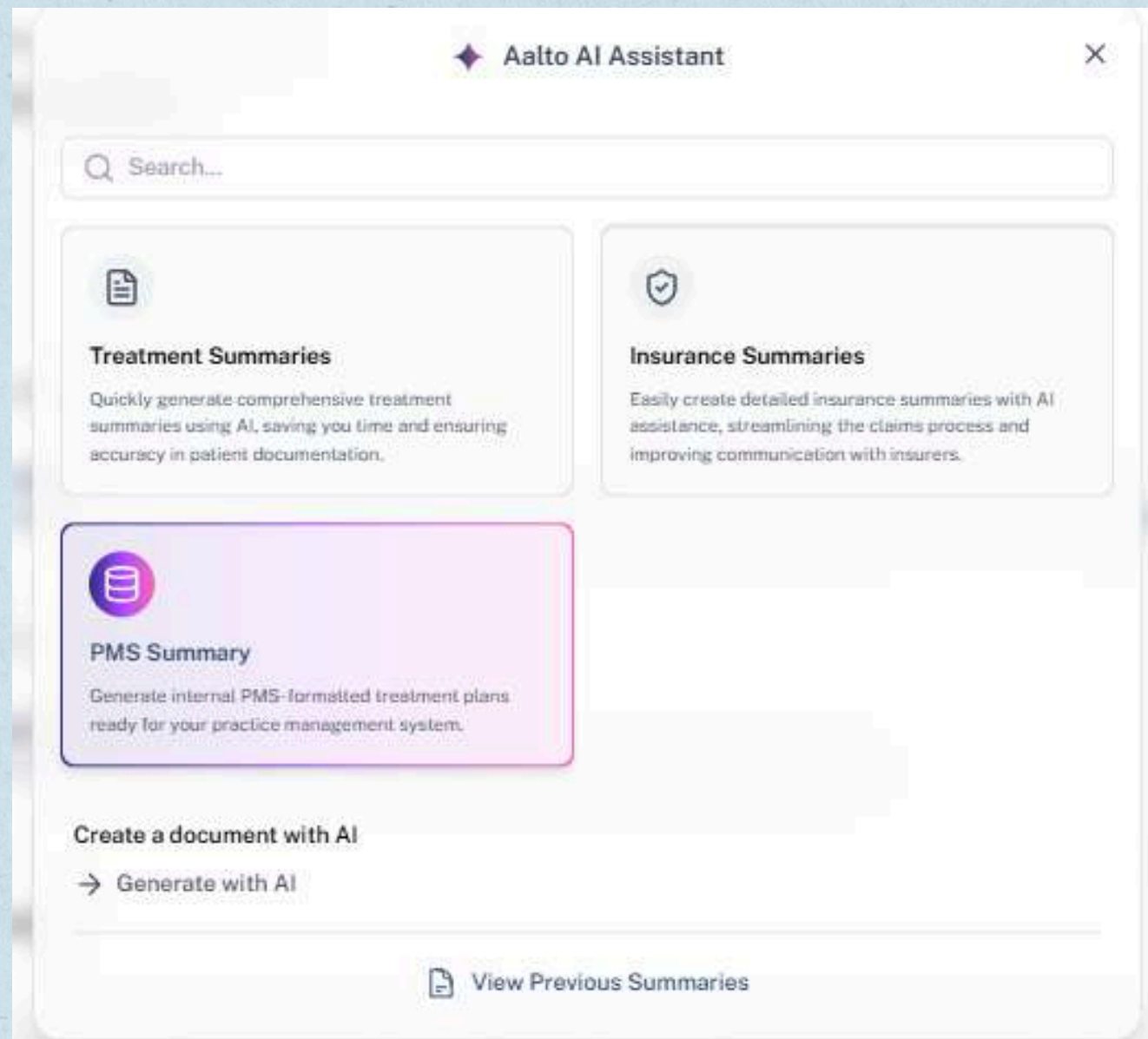
B. AALTO

1. AALTO AI SUMMARIES

1. Insurance Summaries
2. Select Insurance Summaries.
3. Complete the required information.
4. Click Generate.
5. The AI-generated insurance summary will appear.
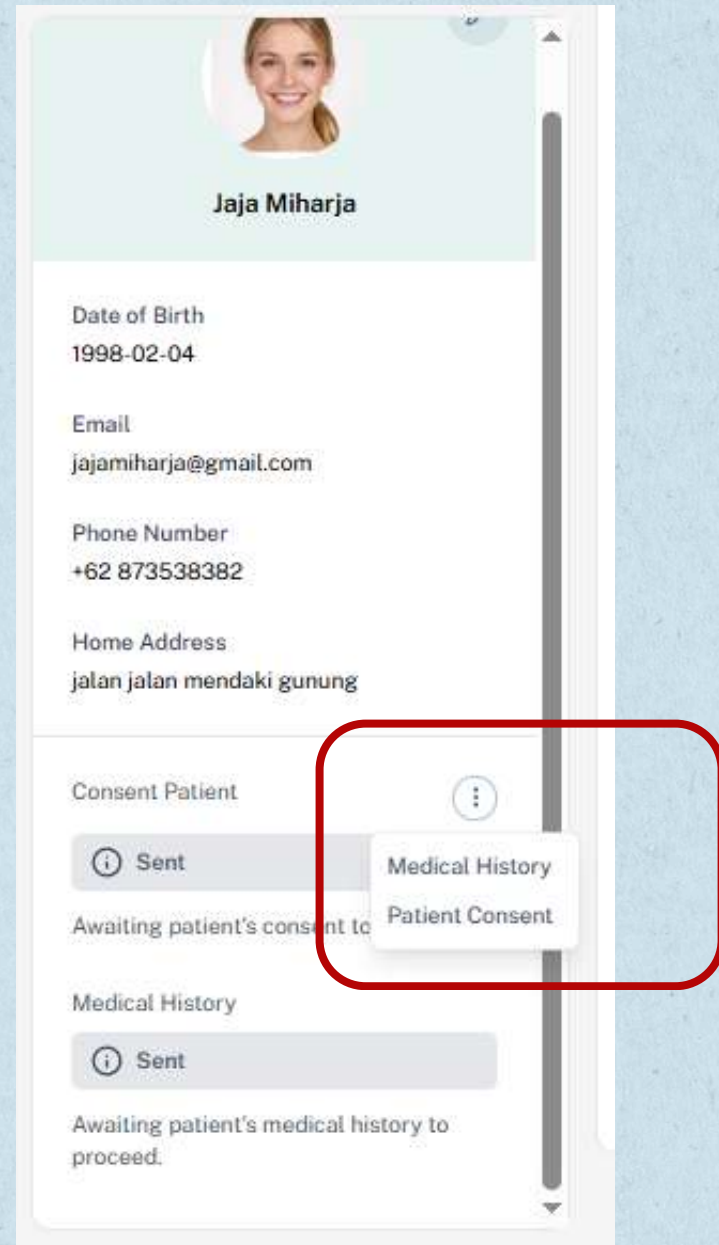6. Click Save to Profile or Copy.
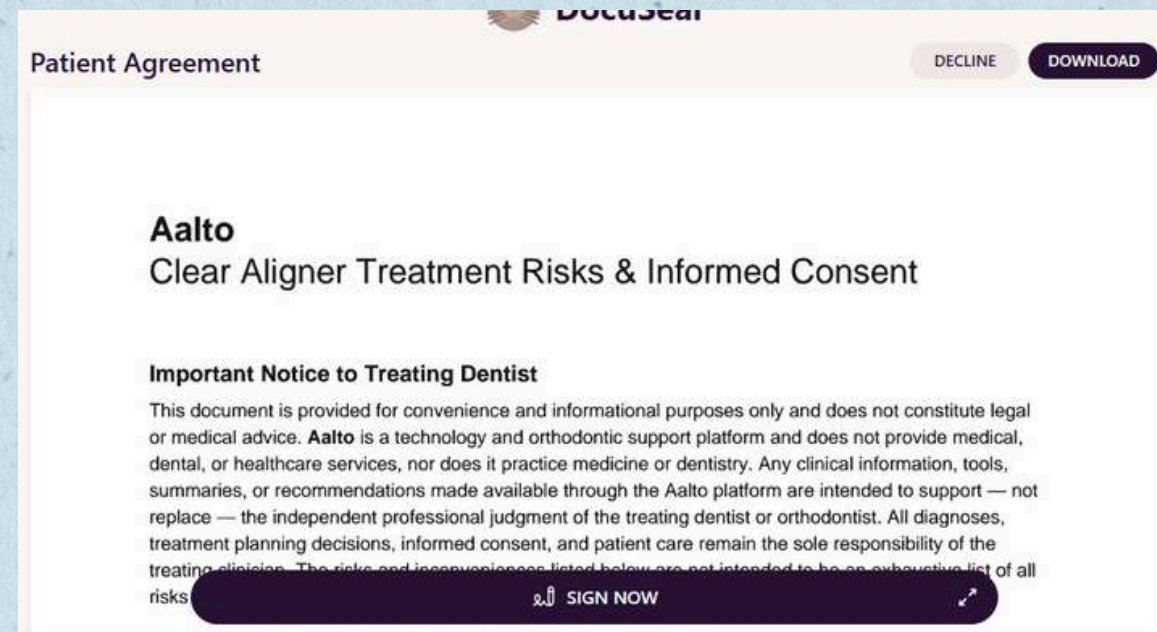
B. AALTO
1. AALTO AI SUMMARIES

- PMS Summaries
- Select PMS Summaries.
- Complete the required information.
- Click Generate.
- The AI-generated PMS summary will appear.
- Click Save to Profile or Copy.
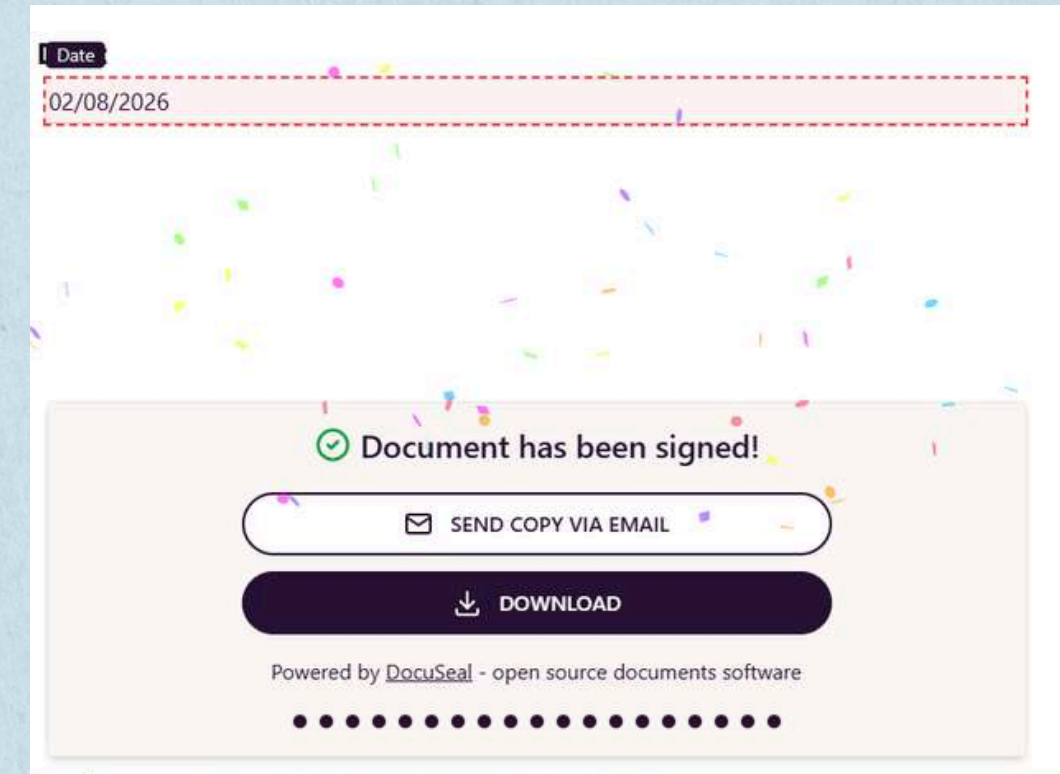
B. AALTO

1. SIGN PATIENT CONSENT DOCUMENT

1. Click the three-dot action menu.
2. Select Patient Consent.
3. Scroll through the document.
4. Click Sign In.
5. Draw the signature and click Next.
6. Set the date and click Complete.
7. The document is successfully signed and can be emailed or downloaded.

B. AALTO
1. SIGN MEDICAL HISTORY AGREEMENT
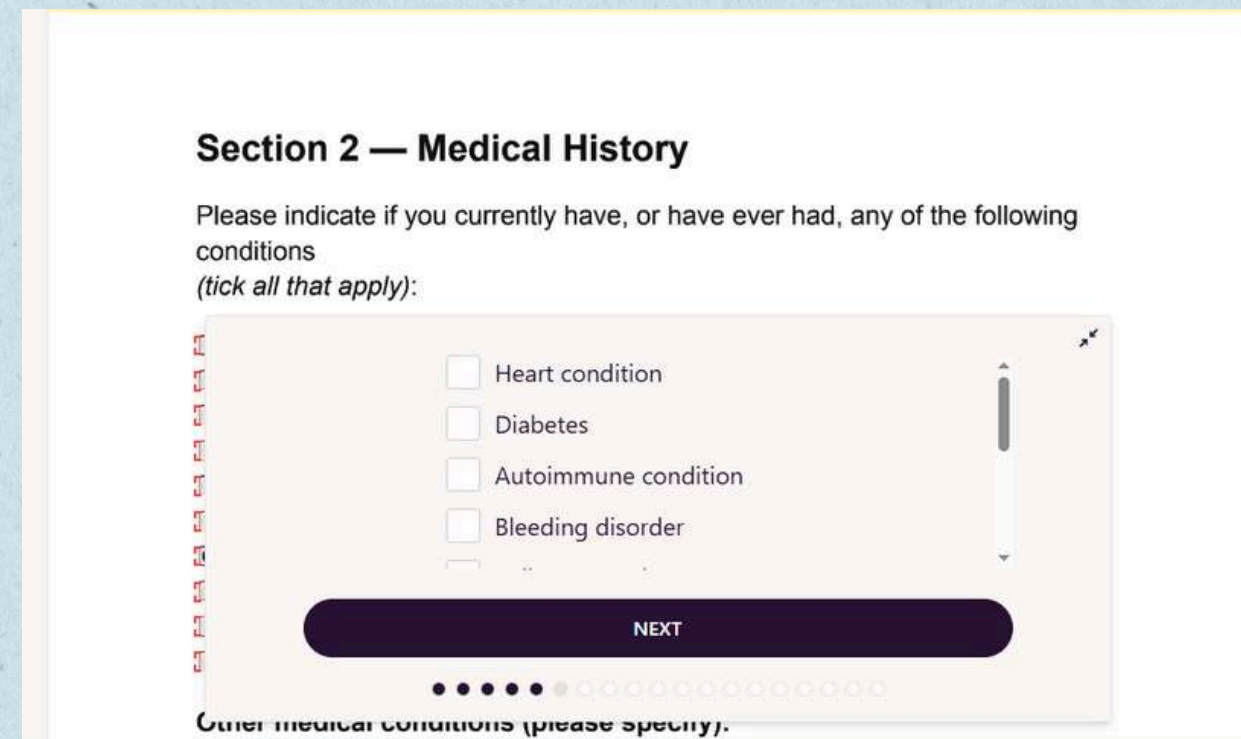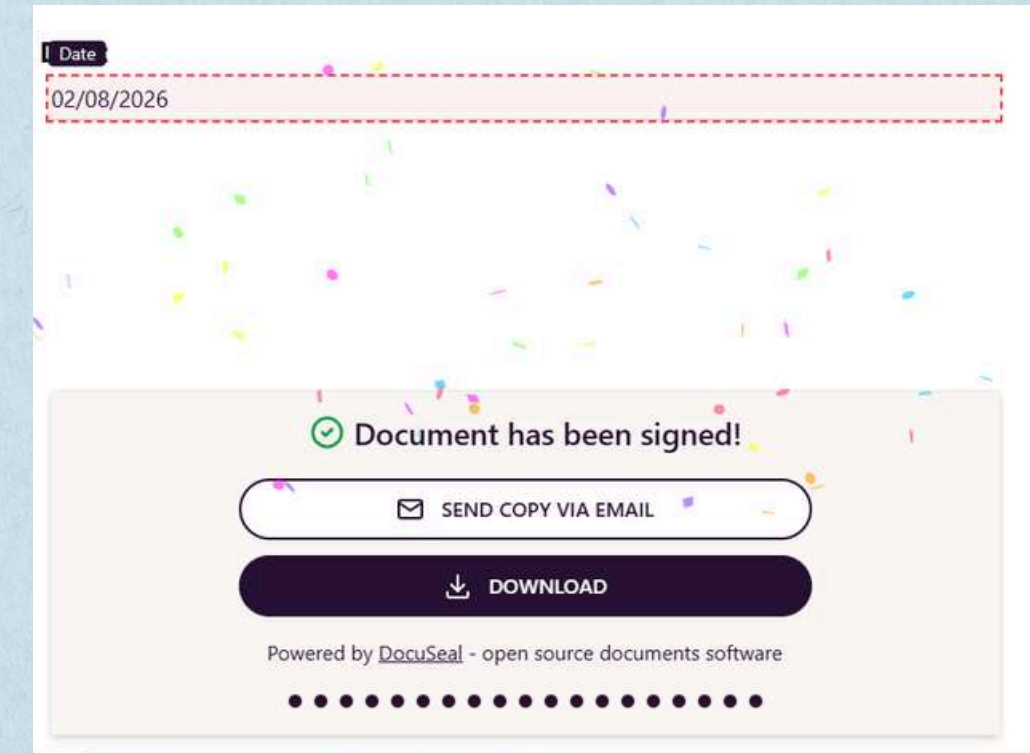
1. Click the three-dot action menu.
2. Select Medical History.
3. Scroll and review the medical history document.
4. Click Sign In.
5. Draw the signature and click Next.
6. Set the date and click Complete.
7. The document is successfully signed and can be emailed or downloaded.

B. MANUFACTURE
1. ASSIGN LAB & MANUFACTURING STATUS
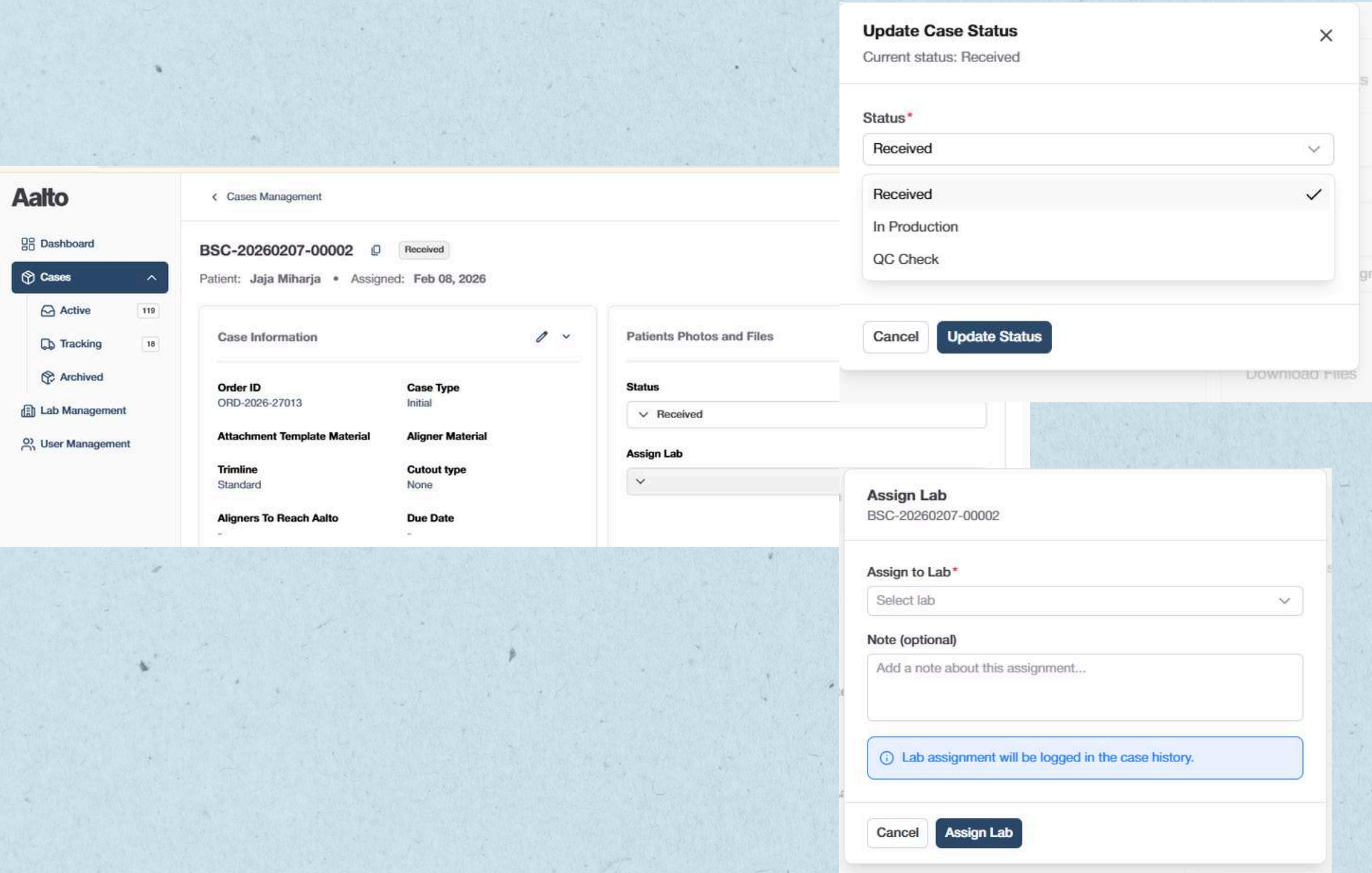
1. Log in to the Manufacturing System.
2. Select the Case menu.
3. Choose a case.
4. Click Assign Lab and select a lab.
5. Click Assign Lab to confirm.
6. Update the status from Received to In Production, then click Update Status.
7. Click Save.
8. Update the status again to Shipped.
9. The case status can be tracked until it reaches Shipped.

B. MANUFACTURE
1. CASE TRACKER
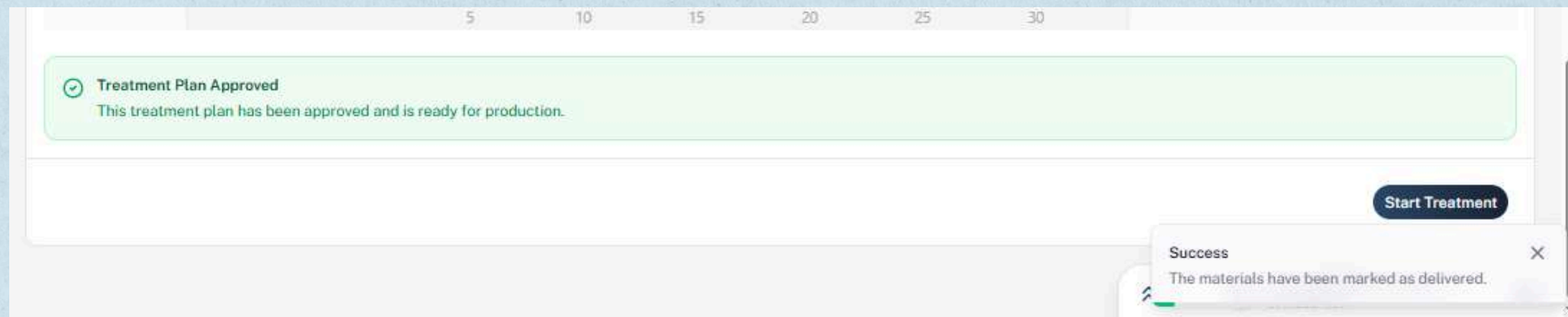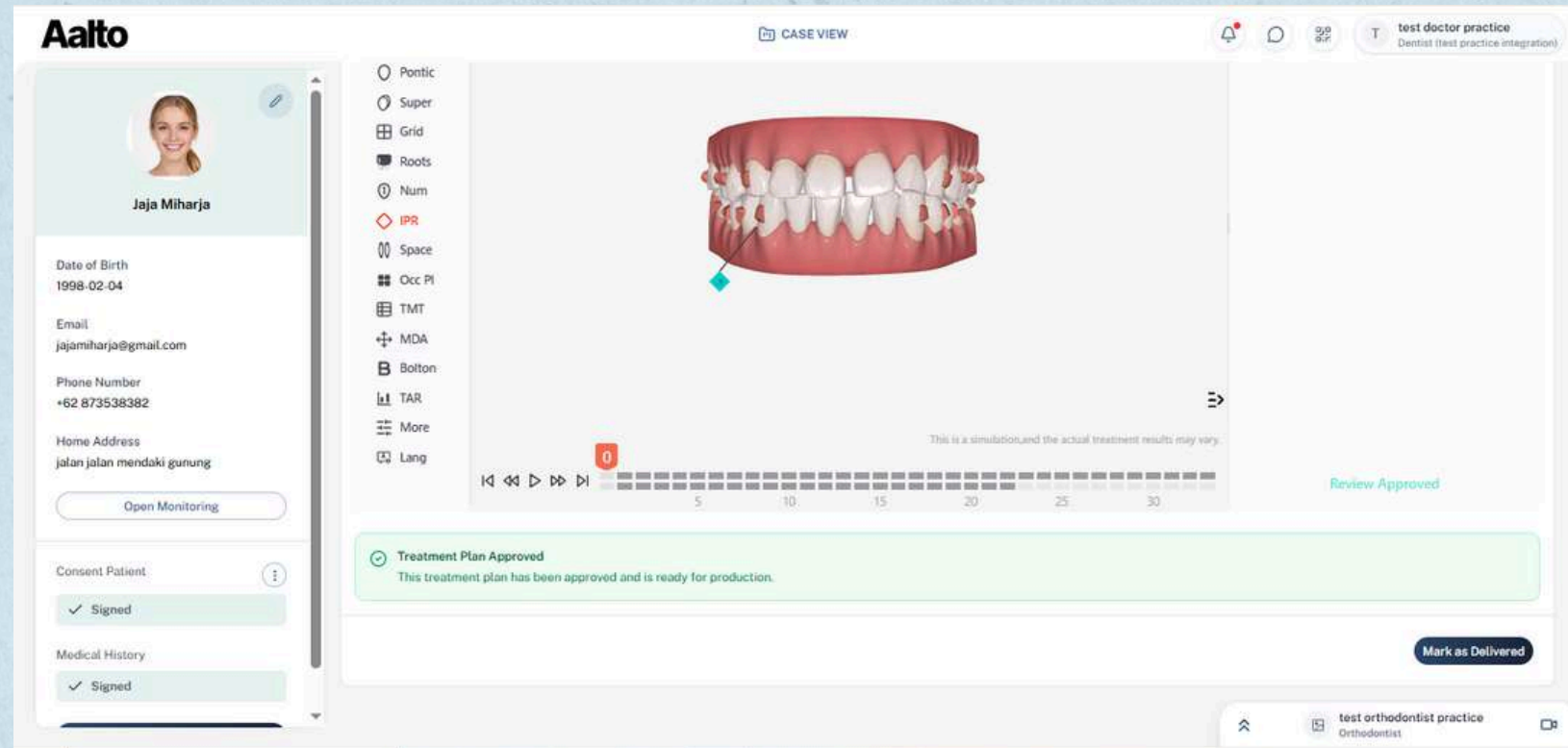

- **The case status can be tracked until it reaches Shipped.**
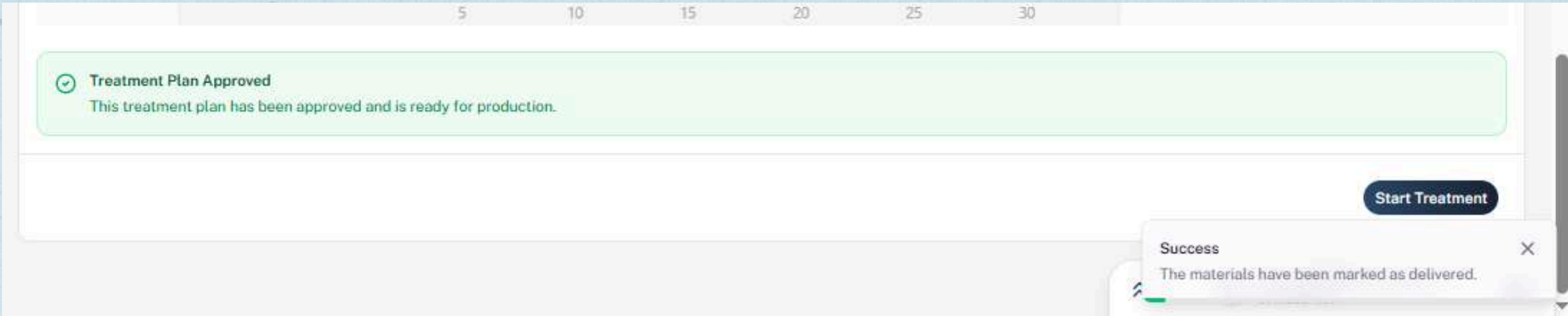
B. MANUFACTURE
1. DELIVERY & TREATMENT STATUS

1. Open the case.
2. Scroll to the bottom.
3. Click Mark as Delivered and confirm.
4. Status will change to Start Treatment.
5. Click Start Treatment.
6. Once finished, click Completed Treatment.

B. MANUFACTURE
1. START TREATMENT

1. Open the case.
2. Scroll to the bottom.
3. Click Mark as Delivered and confirm.
4. Status will change to Start Treatment.
5. Click Start Treatment.
6. Once finished, click Completed Treatment.

B. MANUFACTURE
1. OPEN MONITORING

1. Monitoring
2. Open the case.
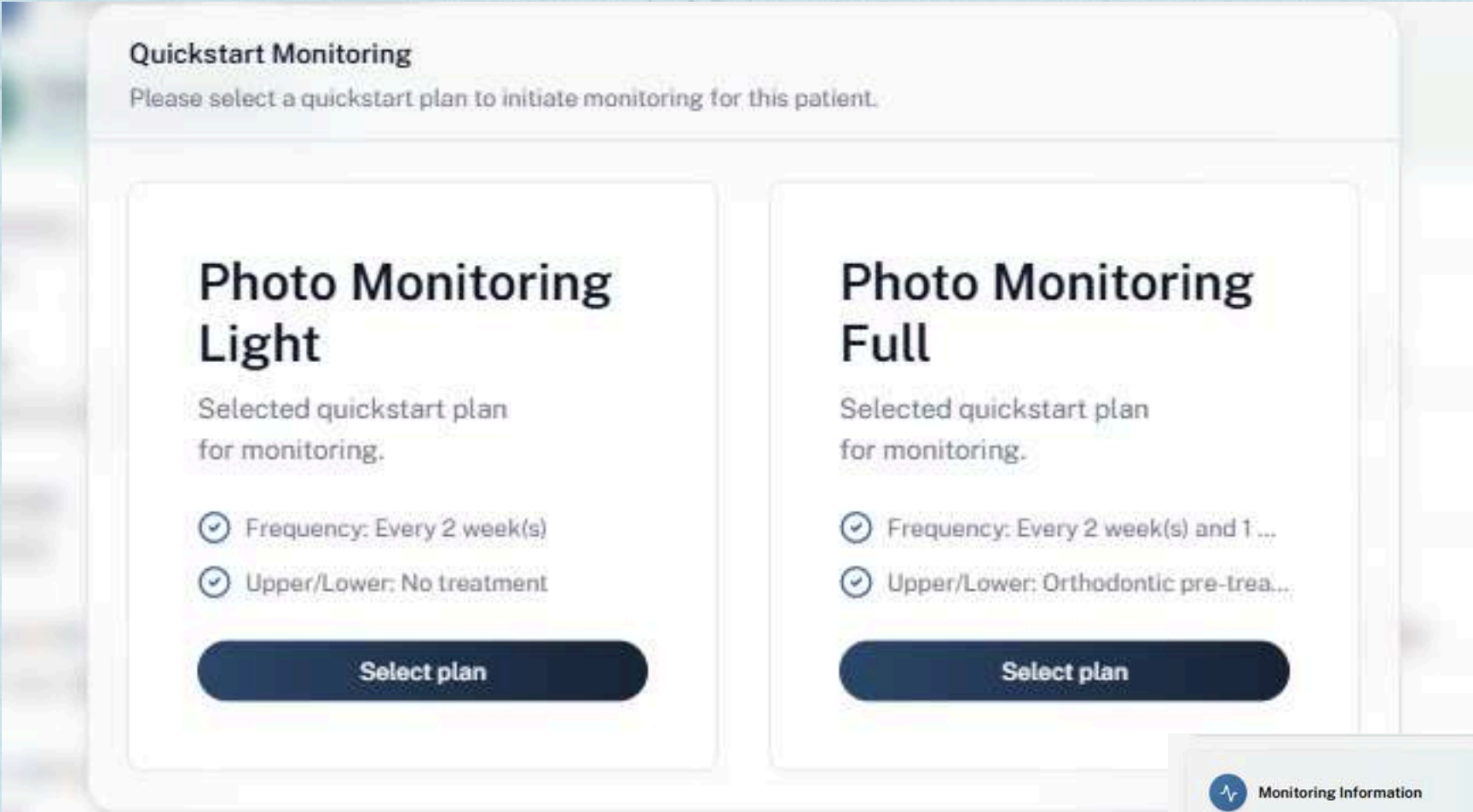3. On the left profile menu, click Open Monitoring.
4. Monitoring information will be displayed,
   including: Information, Agreement, Public Profile

6. Click Start Treatment to begin monitoring.
7. Select Quickstart Monitoring.
8. Choose Pause or Stop Monitoring if needed.
9. Click Completed Treatment when finished.
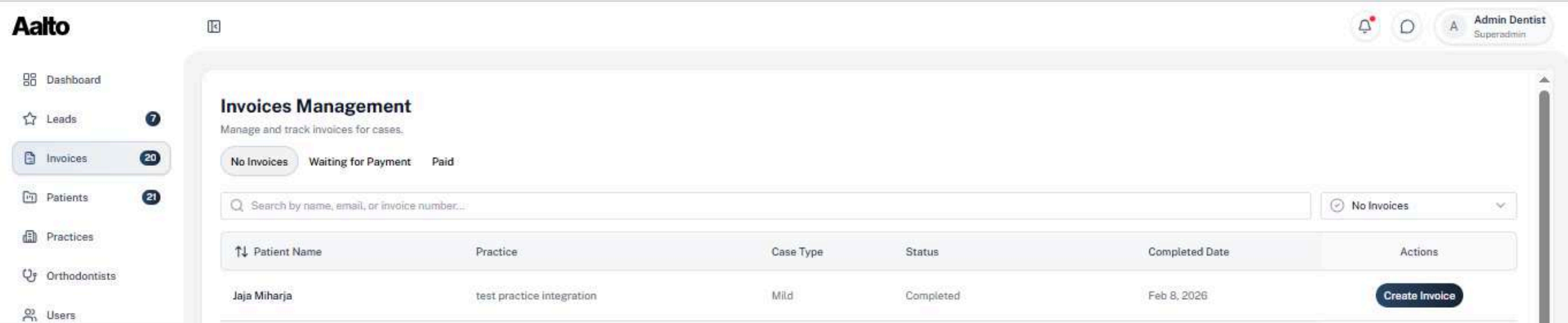
B. MANUFACTURE
1. OPEN MONITORING

1. Click Start Treatment to begin monitoring.
2. Select Quickstart Monitoring.
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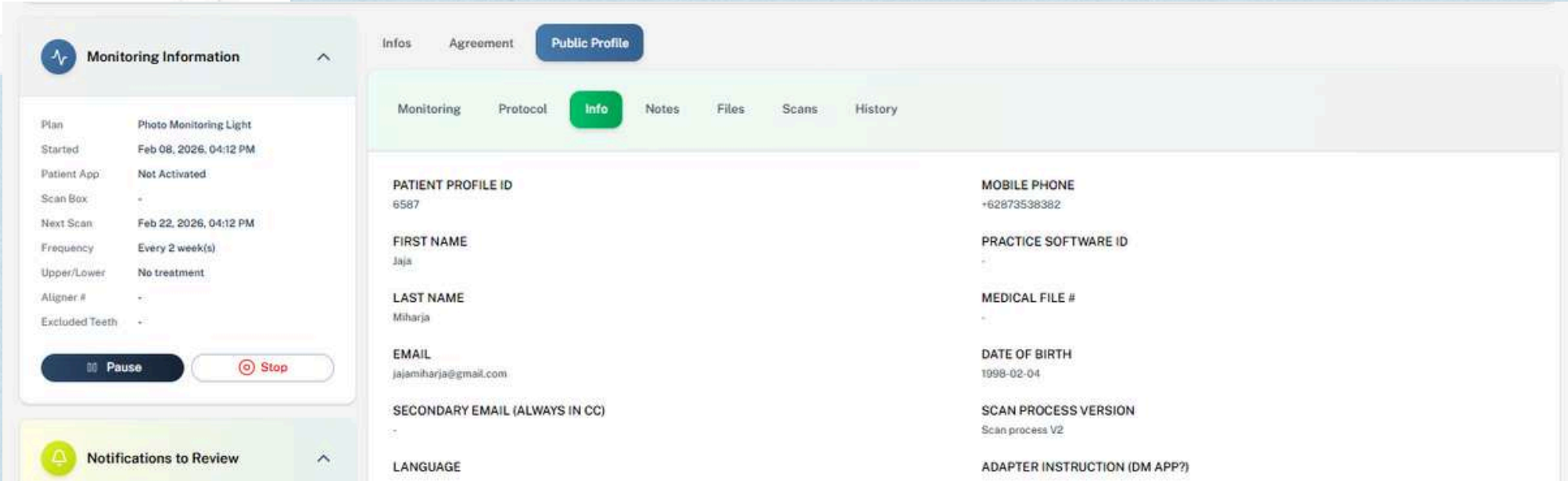
B. INVOICE
1. INVOICE
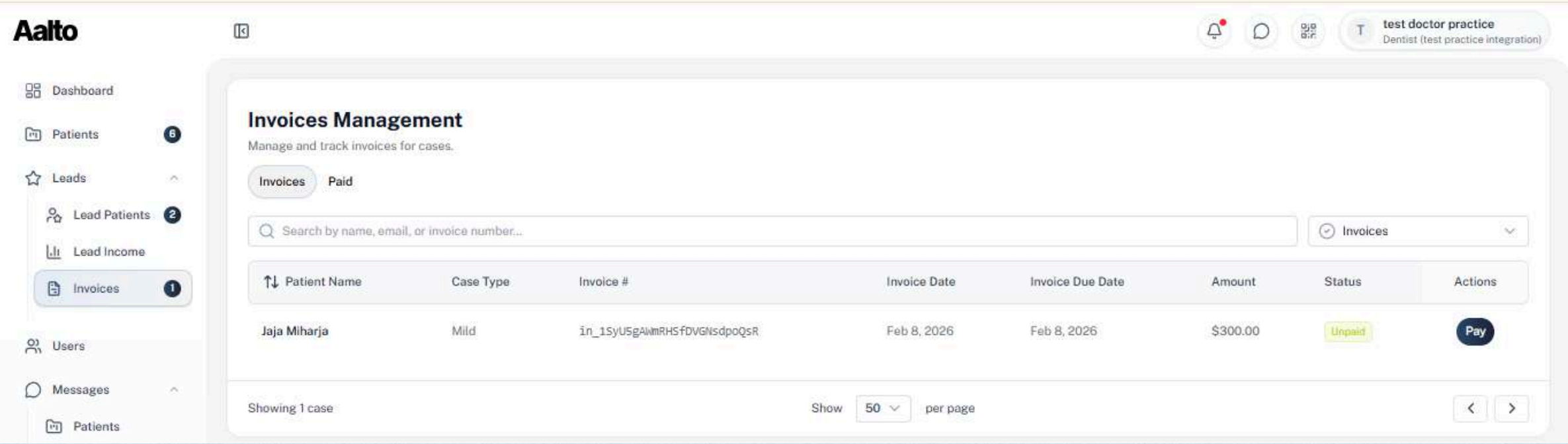

- Create Invoice (Admin)
- Log in as Admin.
- Select Invoice.
- Choose a case in Invoice Management.
- Complete invoice details and add items.
- Click Create Invoice.
- The invoice will appear in the case.

B. INVOICE

1. INVOICE

1. Pay Invoice (Doctor)
2. Log in as Doctor.
3. Select Invoice.
4. Choose a case.
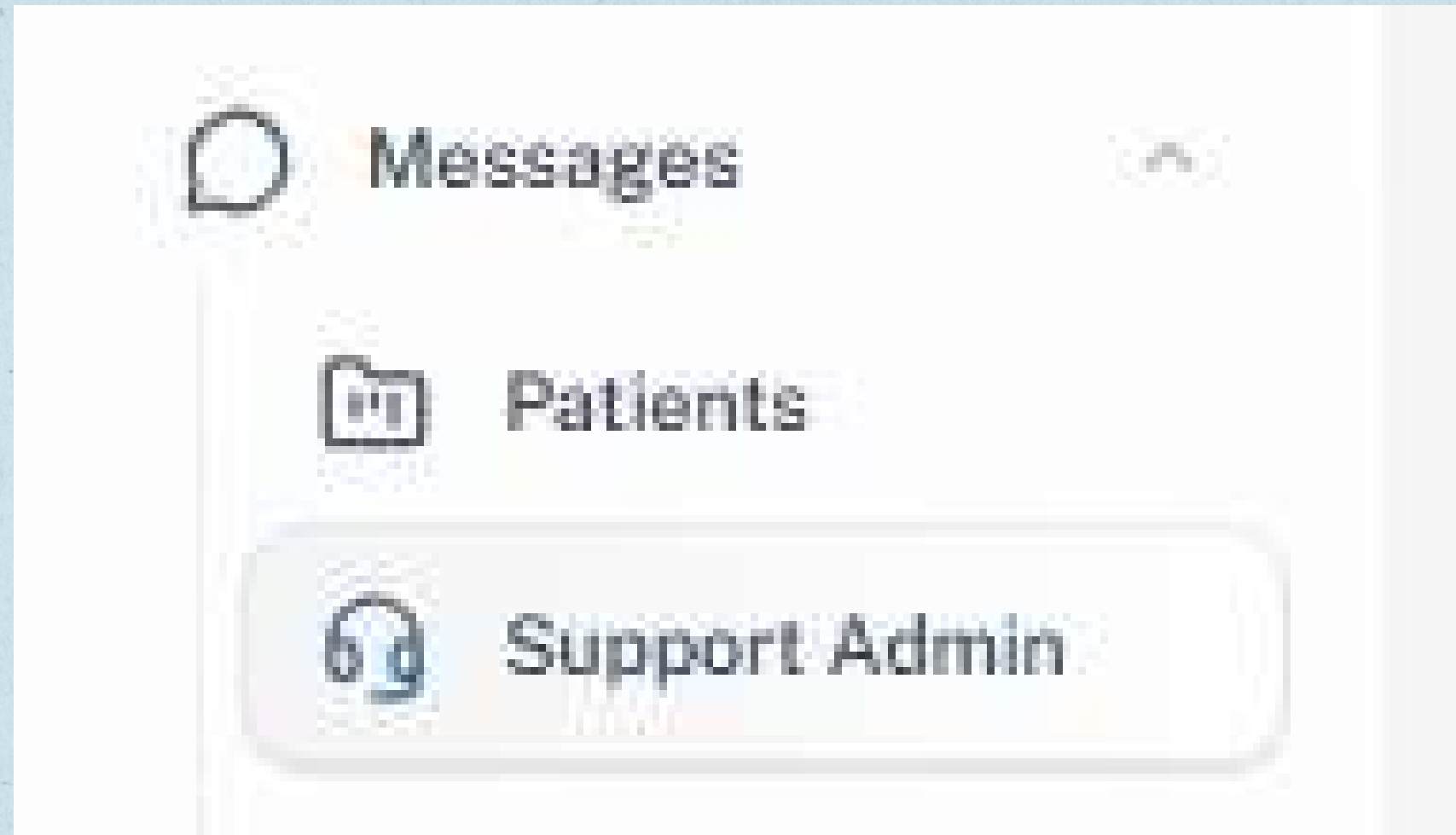5. Click Action → Pay.
6. Review the invoice preview and click Pay.

B. INVOICE
1. INVOICE

- Select Card as the payment method.
- Enter card details and click Pay.
- After successful payment, payment details will be displayed and can be downloaded.

B. MESSAGE
1. MESSAGE

- Messaging
- Log in as Doctor.
- Open a case.
- Click Live Message to communicate with the Orthodontist or Admin.