Step-by-step guide:
Manage your patient records

You can now view all patients and orders associated with your clinic directly in the MyiTero™ portal and on your scanner. This provides full order visibility into each patient's history, including previous orders, scans, Rx, images, and simulations, enabling better clinical decision-making and improved collaboration across the practice.

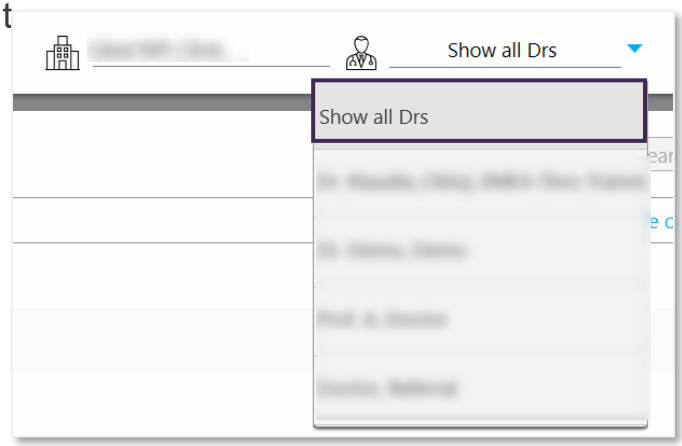
Note: To ensure full view, your practice admin must grant you full order visibility permissions.

Duplicate patient records can now be merged into a single, accurate patient profile, ensuring all historical data is consolidated and easy to access. This action is managed by the practice administrator.

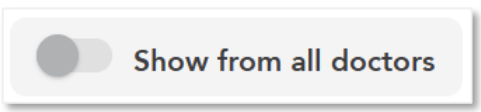
Access and view all clinic orders (from Orders or Patients pages)

Select Orders/ Patients from the home page:

- On the iTero™ scanner: By default the list shows patients/orders from all doctors in your clinic. To view a specific doctor's patients/orders, open the dropdown and select that doctor.



- MyiTero portal: **toggle** the "Show from all doctors" button to view past orders/patients from all doctors in the clinic.



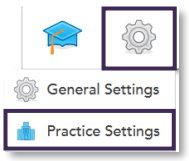
If no administrator can grant you access, you can contact iTero™ Support at _____ to request administrator privileges.

Step-by-step guide:
Manage your patient records as administrators

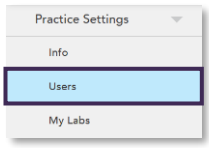
The following steps can be performed only by users with **admin permissions** and only through the **MyiTero™ portal**.

Manage user permissions

01 Open the **Settings** menu from the home page and click **Practice Settings**.

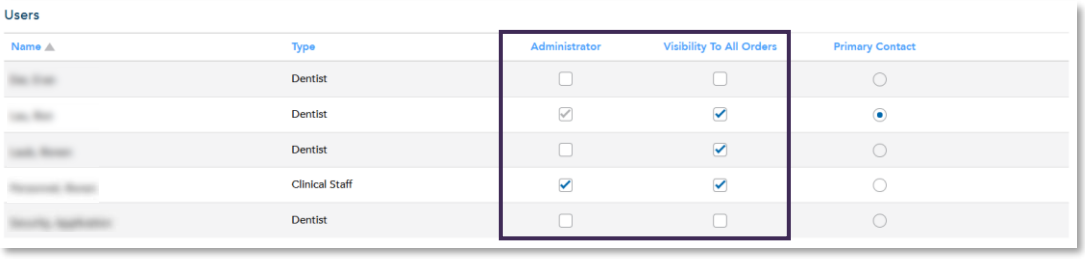


02 Click on the **Users tab** to open the list of users in your clinic.



03 Manage user permissions in the list:

- **Administrator:** manage users in your clinic (add, delete, and edit users).
- **Visibility to all orders:** view all patients and orders associated with the clinic.



Merge duplicate patient records

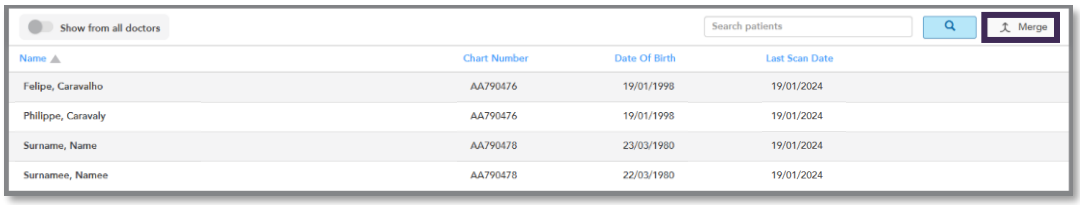
Practice administrators can also merge duplicate patient records, ensuring all historical data is consolidated into a single, accurate patient profile.

This is particularly helpful in cases where patients were scanned by different doctors under slightly varied names, allowing you to easily access and compare all relevant scans within one profile.

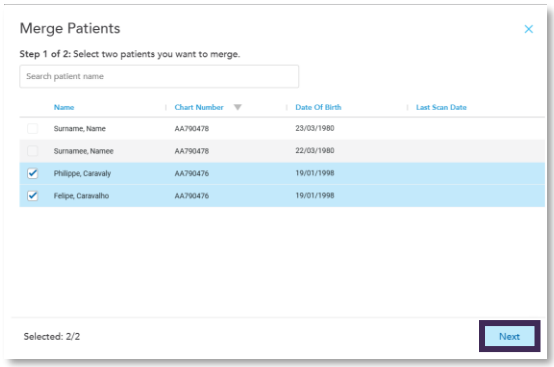
Step-by-step guide:
Manage your patient records as administrators

Merge duplicate patient records - cont.

01 Click on **Patients** from the home page and locate the patient with the duplicated records from the patients list. Then click on the **Merge button**.



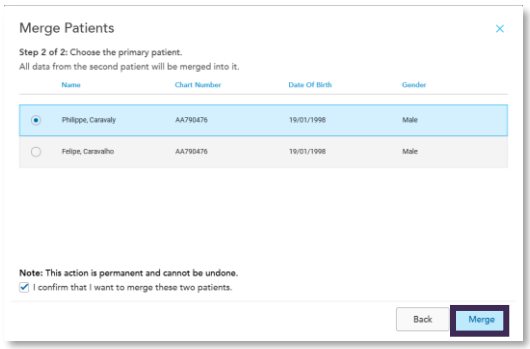
02 On the marge patients tool **select the duplicate** of that patient (spelling error/duplicate from DPMS system) and click **Next**.

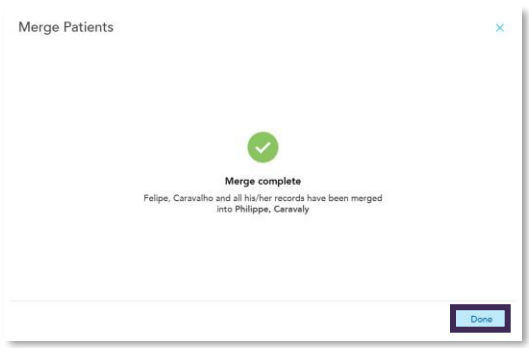


Note: You can merge 2 records at a time.

03 Click **Merge** to approve. Once the process is complete, click on **Done**.

Important note: this action is permanent.





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