

MyTooth

Complete User Guide

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Admin Site

Configure your practice, manage users, set up scheduling, and create forms

1. Getting Started

Admin Only — One-Time Setup: This section covers the initial setup process, typically completed by an Organization Admin. If your organization is already up and running, you can skip to [Section 3: Settings Overview](#).

Welcome to MyTooth! This guide will walk you through setting up your account, connecting your Practice Management System (PMS), and configuring your practice for success.

1.1 Account Creation

Once your practice signs up, our support team will reach out to confirm your account details and create an account for your practice group.

You'll receive:

- ✓ A welcome email with your MyTooth Account information
- ✓ Credentials for your MyTooth Admin site
- ✓ API Key and API Secret of your PMS

Tip: Keep this email in a safe place — you'll need the API details for the next step.

1.2 PMS Authentication

In your Welcome Email, you'll find:

- A direct link to the **MyTooth Admin Site** along with credentials
- Your **API Key** and **API Secret** for connecting your PMS

Follow these steps to complete authentication:

- 1 **Log in** to your MyTooth Admin site using the credentials provided.
- 2 Navigate to `Settings → PMS Authentication`
- 3 Enter the following details:
 - 4 **Denticon API Key:** Paste the key provided in your welcome email
 - 5 **Denticon API Secret:** Paste the corresponding secret
 - 6 **External Organization ID:** Enter your PGID number
- 7 Click "**Test Connection**" to confirm that your credentials are correct.
- 8 Once validated, click "**Save Key**" to securely connect your PMS with the MyTooth application.

The screenshot displays the 'PMS Authentication Settings' page. On the left is a blue sidebar with navigation options: Forms, Scheduling, Activity, and Settings (highlighted). The main header shows 'Settings' and 'PMS Authentication Settings'. Below the header are tabs: Organization, Locations, Communication, Manage Users, My Profile, and PMS Authentication. The 'PMS Authentication' tab is selected, showing a form with three input fields: 'Denticon API key' (with a copy icon and the value 'mt_d-----MyMQ'), 'Denticon API Secret' (masked with dots), and 'External Organization ID'. At the bottom of the form are three buttons: 'Test Connection', 'Save Key', and 'Resync'.

Settings → PMS Authentication Screen

Success! When the connection is successful, your PMS data will begin syncing automatically with MyTooth. All available data from your PMS will be updated after authentication is complete.

Note: If the connection test fails, double-check that the API Key, Secret, and PGID are entered exactly as shown in your welcome email. Contact support if issues persist.

1.3 Quick Notes After PMS Authentication

Once your PMS connection is successfully established, your MyTooth Admin site will automatically perform an **initial sync** to import all key data — including providers, appointment types, locations, and organizational details — directly from your Practice Management System (PMS).

Note: PMS Sync will fetch the respective locations, providers, or appointment type information that has been onboarded for the MyTooth application.

Before proceeding to day-to-day use, view [Quick Reference: Data Sync Overview](#) to understand which fields are editable within MyTooth and which are controlled by your PMS.

2. Settings Overview

This is where you review your synced information, personalize your organization details, add users, and verify communication and location data.

These configurations ensure that your MyTooth environment accurately reflects your real-world practice setup while preserving your PMS data intact.

2.1 Organization Settings

Settings → Organization

This section displays your organization's core information synced from your PMS, along with editable fields for customizing your MyTooth presence.

The screenshot shows the 'My Organization' settings page. On the left is a blue sidebar with navigation options: Forms, Scheduling, Activity, and Settings (selected). The main content area is titled 'Organization Settings' and has tabs for Organization, Locations, Communication, Manage Users, My Profile, and PMS Authentication. The 'Organization' tab is active. Below the tabs, there's a section for 'My Organization' with an 'Edit' button. The settings are organized into two columns. The left column contains the 'Organization Logo' field, which shows a logo for 'DENTALCARE' and a dashed box for uploading a new logo. The right column contains several text input fields: 'External PMS PGID' (4081), 'Organization Name' (Gentle Dental Center test), 'Address Line 1' (241 Lexington Ave), 'Address Line 2' (New Line address), 'City' (Irvine), 'State' (CA), 'Zip Code' (92620), 'Patient Matching Scope' (Organization), and 'Patient Matching Criteria' (Firstname, Lastname, Birthdate, Telephone, Email).

Settings → Organization Tab

Note: Updating data in the Organization tab will **not** affect or overwrite any data stored in your PMS. These updates only change how your information appears within MyTooth.

Patient Matching Settings

These settings determine how MyTooth identifies and matches existing patients on the Booking Site and Form Submission Site:

Patient Matching Scope

- **Organization** — Search for patients across all locations in your organization
- **Location** — Search for patients only within the specific location

Patient Matching Criteria

Select which fields are used to identify returning patients:

- **First Name, Last Name, Birthdate, Telephone, Email** — More strict matching using all five fields
- **First Name, Last Name, Birthdate** — Basic matching using core identifying information

Important: These settings affect patient matching throughout MyTooth — on the Booking Site, Form Submission Site, and when assigning forms in the Admin Site. Choose settings that align with how your practice manages patient records across locations.

2.2 Location Settings

Settings → Locations

This section displays all the offices onboarded for your organization. Each location has its own booking URL for patient-facing scheduling.

Logo	Location Name	Address	Phone	External Location ID	External Location Name	Actions
	Downey Dental Center https://booking.mytooth.io/nPA...	1441 E. Composite Blvd., Downey, CA, 90240	562-922-5444	104	Downey Dental Center	
	LSDA https://booking.mytooth.io/MA...	1225 E 1st St, Duluth, AL, 55805	218-728-6445	107	LSDA	
	Organic Dentistry https://booking.mytooth.io/mUq...	1414 Michaelson Avenue Suite 900, Downey, ...	218-433-8933	101	Organic Dentistry	
	Smile Haven Dental https://booking.mytooth.io/2L...	8745 S. Gale Ave., City Of Industry, CA, 91748	626-678-9879	102	Smile Haven Dental	

Showing 1 to 4 of 4 locations

Edit Location Details Panel

Important: Your External Location ID and External Location Name are fixed identifiers that link to your PMS and **cannot be changed**. Any updates you make here (like name, logo, or address changes) will **not** modify data in your PMS.

2.3 Communication Settings

Settings → Communication

In this section, you can verify and test your communication configurations:

- Confirm the correct **DPC Phone Number**, **Transaction Email**, and **Marketing Email** are shown for each location and External Location ID
- Send a **test SMS** and **test email** to ensure the system is functioning correctly

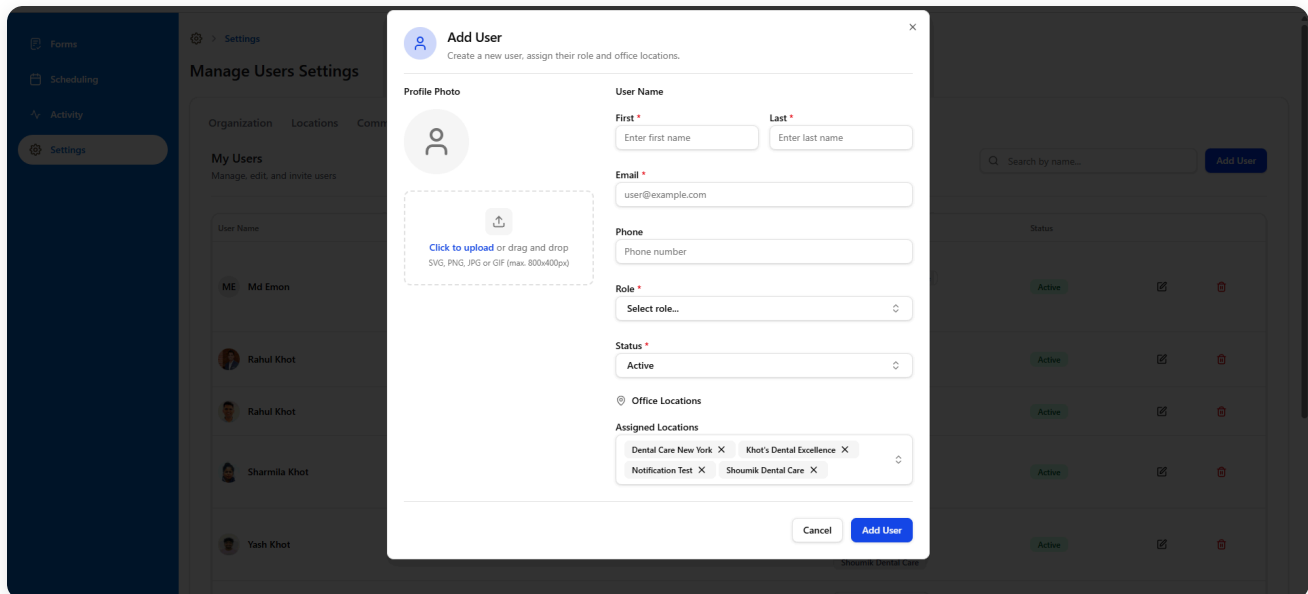
2.4 Manage Users

Settings → Manage Users

Manage, edit, and invite users to your MyTooth organization. Each user can be assigned specific roles and location access.

User Roles

Role	Description
Organization Admin	Has full access to the organization for all actions across all locations
Location Admin	Assigned locations level admin access (edit/view)
Staff	Assigned locations level access (view only, forms or packets assignment)
Support	Provides support access to the organization



Add User Panel

Note: A welcome email with a temporary password will automatically be sent to the new user's email address after its added from here.

2.5 My Profile

Settings → My Profile

From here, you can:

- View your profile information
- Update your name, contact details, and profile photo

2.6 PMS Authentication

Settings → PMS Authentication

This tab displays your PMS connection details and allows you to manage your API credentials. For initial setup instructions, see [Section 1.2 PMS Authentication](#).

Available Actions:

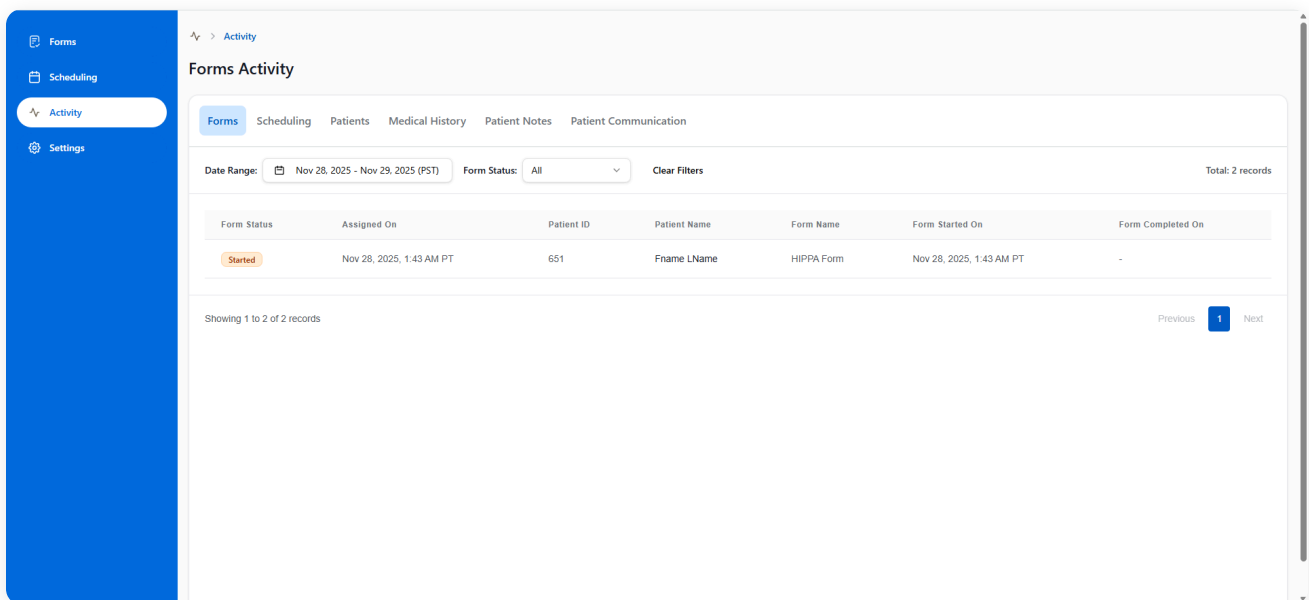
- **Test Connection** — Verify your API credentials are working correctly
- **Save Key** — Update your API credentials if they have changed
- **Resync** — Manually trigger a data sync from your PMS to refresh providers, schedules, and other PMS data

Note: Use the **Resync** button when you've made changes in your PMS (new providers, updated schedules, etc.) that need to reflect in MyTooth.

3. Activity

The Activity section provides a comprehensive view of all activities happening within your MyTooth system. It tracks forms, scheduling, patient data, medical history, notes, and communications across your practice.

Activity → [Tab Name]




Activity Screen - Forms Tab Overview

3.1 Forms

The Forms tab displays all form-related activity including assignments, submissions, and completions.


Column	Description
Form Status	Shows the current state: Assigned , Started , or Completed
Assigned On	Date and time when the form was assigned to the patient

Column	Description
Patient ID	The patient's ID from PMS. Shows  for anonymous patients using public forms
Patient Name	Full name of the patient
Form Name	Name of the form. If part of a packet, displays a chip with the packet name
Form Started On	Date and time when the patient started filling out the form
Form Completed On	Date and time when the form was submitted

Form Status Flow

- **Assigned:** Form has been assigned to a patient but not yet started
- **Started:** Patient has begun filling out the form (shows Started On time)
- **Completed:** Patient has submitted the form (shows Completed On time)

Note: When a packet is assigned, each form within the packet is listed separately with a chip showing the packet name it belongs to.

Tip: For public forms accessed by anonymous patients (not yet in PMS), the Patient ID displays as  until the patient record is created.

3.2 Scheduling

The Scheduling tab shows all appointment-related activity.

Column	Description
Patient Type	Indicates if the patient is new or existing
Appointment Date & Time	Scheduled date and time of the appointment
Patient ID	Patient's ID from PMS
Patient Name	Full name of the patient
Provider Name	Name of the assigned provider
Appointment Type	Type of appointment scheduled
Appointment Status	Current status of the appointment
Appointment Production	Production type associated with the appointment
Created On	When the appointment was created
Modified On	When the appointment was last modified

3.3 Patients

The Patients tab tracks patient record creation and updates.

Column	Description
Patient Action	Created for new patients or Modified for demographic updates
Patient ID	Patient's ID from PMS
Patient Name	Full name of the patient
Patient Phone	Patient's phone number
Patient Email	Patient's email address

Column	Description
Created On	When the record was created
Modified On	When the record was last modified

3.4 Medical History

The Medical History tab shows all medical history submissions and updates.

Column	Description
Med History Action	Created for new submissions or Modified for same-day updates
Patient ID	Patient's ID from PMS
Patient Name	Full name of the patient
# of Alerts Updated	Number of medical alerts that were updated
# of Questions Updated	Number of medical history questions that were answered/updated
Created On	When the medical history was first submitted
Modified On	When the medical history was last updated

Note: When multiple medical history submissions occur on the same day for a patient, subsequent submissions show as "Modified" rather than "Created."

3.5 Patient Notes

The Patient Notes tab displays all patient notes added through MyTooth.

Column	Description
Patient ID	Patient's ID from PMS
Patient Name	Full name of the patient
Patient Note Type	Category or type of the note
Patient Notes	Content of the note
Created On	When the note was created
Modified On	When the note was last modified

3.6 Patient Communication

The Patient Communication tab shows all SMS and email messages sent through MyTooth.

Column	Description
Message Type	SMS or EMAIL
Patient ID	Patient's ID from PMS
Patient Name	Full name of the patient
Message	Content of the message sent
Created On	When the message was sent
Modified On	When the record was last modified

- Forms
- Scheduling
- Activity
- Settings

Activity

PMS Patient Communication Activity

Forms
Scheduling
Patients
Medical History
Patient Notes
Patient Communication

Date Range:

Nov 28, 2025 - Nov 28, 2025

Message Type:

All

Total: 24 records

Message Type	Patient ID	Patient Name	Message	Created On	Modified On
Email	689	Test Patient	Complete Your Forms - Gentle Dental Center test	Nov 28, 2025, 10:48 AM	Nov 28, 2025, 10:48 AM
SMS	689	Test Patient	Hi Test! You have 1 form(s) to complete for Gentle Dental Center test. Complete here: https://forms.dev.mytooth.io/ml_33M65m4xPHWCNLcf2RSxHdKhFu	Nov 28, 2025, 10:48 AM	Nov 28, 2025, 10:48 AM

Activity Screen - Patient Communication Tab

4. Scheduling Setup

After completing your profile, organization, and communication settings, you can review and configure your scheduling options within the MyTooth Admin Site.

All scheduling information is synced directly from your **Practice Management System (PMS)** to ensure accuracy and consistency across both platforms.

4.1 Providers

Scheduling → Providers

Once your PMS is connected, all available providers will automatically appear under this tab.

Provider Display Name	Provider Name	Provider Type	Booking Online	Provider Status	Appointment Type
Dr. Khan	DAPI-145, Khanh [ABC123]	Dentist	Yes	Active	Crowns, Consults
Dr. Lee	Lee, Brett [BTLEE]	Dentist	Yes	Active	Consults, Restorative, New Patient, New Patient (14 and above), Hygiene, Crowns

Scheduling → Providers List View

Important: You **cannot** add or delete providers from MyTooth — this must be done directly in your PMS.

Provider List Columns


Column	Description
Provider Display Name	The name displayed to patients (editable in MyTooth)
Provider Name	Full name from PMS with Provider ID (e.g., DAPI-145, Khanh [ABC123])
Provider Type	Type of provider (e.g., Dentist)
Booking Online	Yes or No — whether the provider is available for online booking
Provider Status	Active or Inactive
Appointment Type	Appointment types assigned to this provider (e.g., Crowns, Consults, New Patient)

Editing a Provider

Click the edit icon on any provider row to open the Edit Provider panel:

Edit Provider: Dr. Khan ✕

Set Provider Photo



Click to upload or drag and drop

PNG, JPG, GIF up to 10MB

Provider Information (Editable)

Provider Display Name

Booking Online

Status

PMS Information

PMS Provider ID / Short ID

PMS Provider Name

PMS Provider Type

PMS Provider Specialty

Search and Add Appointment Types

Crowns ✕

Consults ✕

Edit Provider Panel

Provider Information (Editable)

- **Set Provider Photo** — Upload a profile photo (PNG, JPG, GIF up to 10MB)
- **Provider Display Name** — The name shown to patients on the booking site
- **Booking Online** — Enable or disable online booking for this provider (Yes/No)
- **Status** — Set provider as Active or Inactive in MyTooth

PMS Information (Read-Only)

The following fields are synced from your PMS and cannot be edited in MyTooth:

- **PMS Provider ID / Short ID** — Unique identifier from your PMS
- **PMS Provider Name** — Full name as recorded in your PMS
- **PMS Provider Type** — Provider type (e.g., Dentist)

- **PMS Provider Specialty** — Provider specialty (e.g., General Practice)

Search and Add Appointment Types

Assign which appointment types this provider can perform:

- Use the search box to find and add appointment types
- Added types appear as chips (e.g., Crowns × Consults ×)
- Click the × on any chip to remove an appointment type

Note: All updates made here affect only the MyTooth interface and do **not** modify provider data in your PMS.

4.2 Provider Schedule

Scheduling → Provider Schedule

This section allows you to **view** provider schedules, holidays, operatories, and assigned locations.

Note: All data in this view is **fetches directly from your PMS** and **cannot be edited** within MyTooth. If any changes are needed, please update them in your PMS — they will automatically sync back to MyTooth upon PMS Sync is triggered.

4.3 Appointment Types

Scheduling → Appointment Types

In this section, you can manage the appointment types offered through MyTooth for online booking.

Scheduling → Appointment Types List View

Important: Each appointment type **must be associated with a Production Type** from your PMS in order to work correctly with the scheduling system.

Patient Type Tabs

Appointment types are organized into three categories:

- **New Patients** — Appointment types available only for new patients
- **Existing Patients** — Appointment types available only for existing patients
- **Both** — Appointment types available for all patients

Appointment Type List Columns

Column	Description
Name	The appointment type name displayed to patients (e.g., Consults, Crowns, New Patient)
Booking Online	Active or Inactive — whether this type is available for online booking
Duration	Length of the appointment (e.g., 30 minutes, 60 minutes)
PMS Production Type	The linked production type from your PMS (required for slot matching)

Column	Description
PMS Explosion Code	Optional explosion code for automatic ADA procedure code assignment when appointment is created

Adding a New Appointment Type

Click the "**Add appointment type**" button to create a new appointment type:

Add new appointment type
Set the name, duration, and booking settings for this appointment type.

Appointment Type*

Duration

Online booking

Patient Type

PMS Production Type*

Add New Appointment Type Panel

PMS Production Type Required

Each appointment type must be linked to a **PMS Production Type**. This mapping ensures that when patients book online, the system finds the correct available slots from your practice management system's schedule.

PMS Explosion Code (Optional)

To automate the addition of ADA procedure codes when appointments are booked through MyTooth, you can map an **Explosion Code** to each appointment type.

What is an Explosion Code? In Denticon, Explosion Codes are pre-configured groups of ADA procedure codes. When an explosion code is applied to an appointment, all associated procedure codes are automatically added to the appointment record.

The screenshot shows a modal window titled "Add new appointment type" with the subtitle "Set the name, duration, and booking settings for this appointment type." The form contains the following fields:

- Appointment Type***: A text input field with the placeholder "Enter appointment type name".
- Duration**: A dropdown menu currently set to "30 minutes".
- Online booking**: A toggle switch that is currently turned on.
- Patient Type**: A dropdown menu currently set to "New Patient".
- PMS Production Type***: A dropdown menu with the placeholder "Search for a production type..." and a diamond icon.
- PMS Explosion Code**: A dropdown menu with the placeholder "Select PMS Explosion Code" and a downward arrow icon. This field is highlighted with a red rectangular border.

At the bottom of the form are two buttons: "Cancel" and "Save".

PMS Explosion Code Dropdown in Edit Appointment Type Panel

How to Configure Explosion Codes

- In Denticon:** Create new explosion codes for each production type (e.g., `Exp_Code_Consult`, `Exp_Code_Exam`) and define the ADA codes within each, or use existing explosion codes already configured in your system
- In MyTooth:** Go to `Scheduling` → `Appointment Types`

3. Edit an existing appointment type or create a new one
4. Below the **PMS Production Type** dropdown, you'll see the **PMS Explosion Code** dropdown
5. Select the appropriate explosion code from the list (shows all available explosion codes for that location)
6. Save the appointment type

Automatic Procedure Addition: When a patient books an appointment with this appointment type through MyTooth, the system automatically adds all procedure codes associated with the selected explosion code to the appointment in Denticon.

Explosion Codes with Additional Configuration

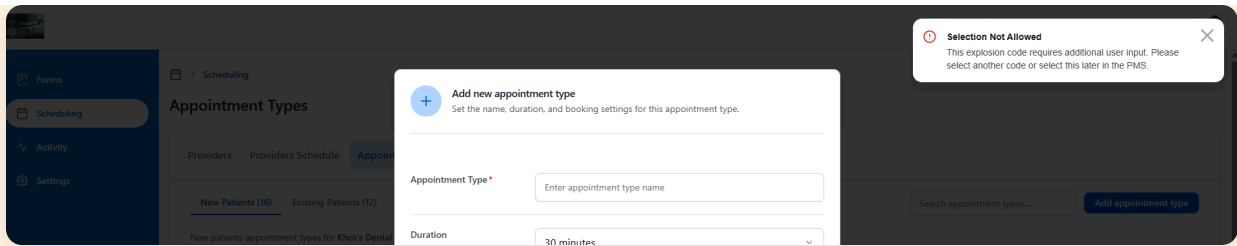
Some explosion codes in Denticon require additional configuration such as **Tooth, Surface, or Quadrant** selection. These explosion codes **cannot be selected** from MyTooth.

The screenshot shows the Denticon Transactions Entry interface. A modal window titled "TOOTH / SURFACE / QUADRANT" is open, prompting the user to "PLEASE SPECIFY TOOTH# AND/OR SURFACE(S) FOR THE PROCEDURE." The window contains a table with the following columns: CODE, Description, Tooth#, Quadrant, Surfaces, and Materials. The table lists four rows for the explosion code 41899, each with the description "Unlisted Procedure, Dentoalveolar Structurs, By ...". Each row has a dropdown menu in the Tooth# column. The background interface shows the patient information (Hasan, Mahedi), the date (12/12/2025), and various navigation options like "ADD PROCEDURES" and "PAYMENT".

CODE	Description	Tooth#	Quadrant	Surfaces	Materials
41899	Unlisted Procedure, Dentoalveolar Structurs, By ...				
41899	Unlisted Procedure, Dentoalveolar Structurs, By ...				
41899	Unlisted Procedure, Dentoalveolar Structurs, By ...				
41899	Unlisted Procedure, Dentoalveolar Structurs, By ...				

Example of Explosion Code Requiring Tooth/Surface/Quadrant Configuration in Denticon

If you attempt to select an explosion code that requires additional configuration, MyTooth will display a warning message:



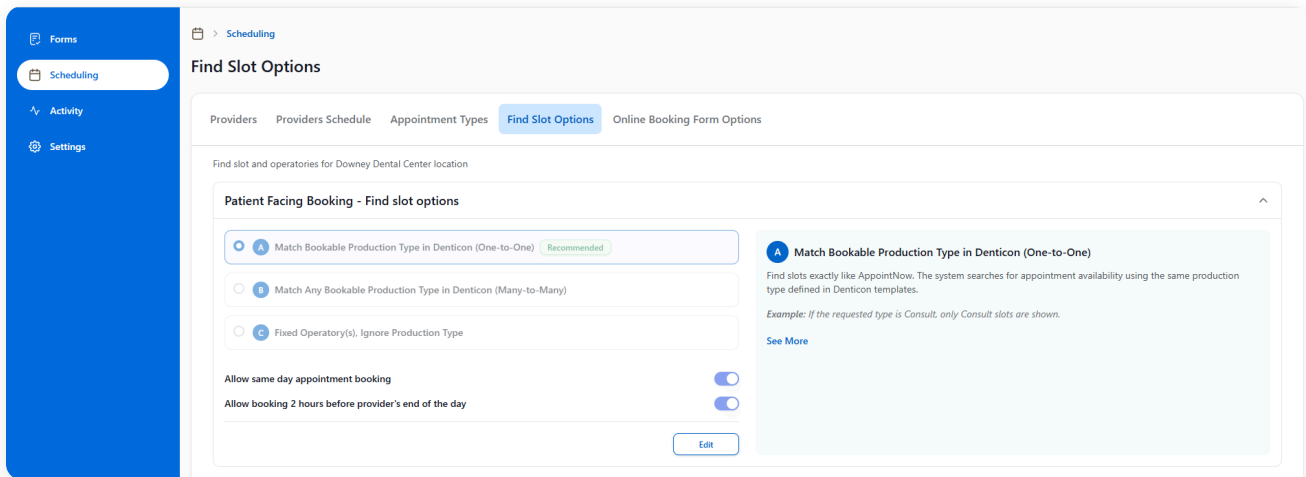
Warning Message for Explosion Codes Requiring Additional Configuration

Resolution: For explosion codes that require Tooth, Surface, or Quadrant configuration, you will need to manually add these procedure codes from within Denticon after the appointment is created.

4.4 Find Slot Options

Scheduling → Find Slot Options

This section lets you fine-tune how MyTooth searches for available appointment slots for the Patient Facing Booking site.



Find Slot Options - Patient Facing Booking Configuration

Patient Facing Booking - Find Slot Options

Choose how MyTooth searches for available appointment slots. There are three options:

- A Match Bookable Production Type in Denticon (One-to-One)** Recommended

Find slots exactly like AppointNow. The system searches for appointment availability using the same production type defined in Denticon templates.

Example: If the requested type is Consult, only Consult slots are shown.

The screenshot displays a dental schedule for Miller, Marcus (Operator) and The Best Dentistry. The schedule is organized by time slots (15, 30, 45) and includes various appointment types such as 'Consult', 'New Patient-Dental', and 'New Patient'. A booking modal is open, showing a calendar for October 2025 with the 27th selected. The modal displays time slots for 8:00 AM, 11:00 AM, and 1:00 PM. Red arrows point from the 'Consult' slots in the schedule to the booking modal, indicating that only these slots are visible in the booking interface.

Option A: Only Consult slots from the schedule appear in booking

B Match Any Bookable Production Type in Denticon (Many-to-Many)

Find slots similar to AppointNow, but allow interchangeable production types. The system searches for any slot linked to bookable production types in Denticon (many-to-one mapping).

Example: Consult, New Patient, or New Patient-Dental can all show available slots from any of those categories.

The screenshot displays a dental schedule for Miller, Marcus (Operator) and The Best Dentistry. The schedule is organized by time slots (15, 30, 45) and includes various appointment types such as 'Consult', 'New Patient-Dental', and 'New Patient'. A booking modal is open, showing a calendar for October 2025 with the 27th selected. The modal displays time slots for 8:00 AM, 9:00 AM, 11:00 AM, and 1:00 PM. Purple arrows point from the 'Consult', 'New Patient-Dental', and 'New Patient' slots in the schedule to the booking modal, indicating that slots from these categories are visible in the booking interface.

Option B: Slots from Consult, New Patient, or New Patient-Dental categories all appear

Column	Description
Operator ID	The unique identifier for each operator from your PMS
Operator Name	The name/number of the operator
Booking Online	Status showing if the operator is Active or Inactive for online booking

Note: These configurations control how the MyTooth booking system matches patient requests with available times based on PMS data.

4.5 Online Booking Form Options

Scheduling → Online Booking Form Options

This section allows you to configure which fields and options are displayed on the Patient Facing Booking site when patients book appointments online. You can configure different options for **New Patient** and **Existing Patient** booking flows.

The screenshot displays the 'Online Booking Form Options' configuration page. The interface includes a left-hand navigation menu with 'Forms', 'Scheduling', 'Activity', and 'Settings'. The main content area is titled 'Online Booking Form Options' and shows a breadcrumb trail: 'Scheduling > Online Booking Form Options'. Below the title, there are tabs for 'Providers', 'Providers Schedule', 'Appointment Types', 'Find Slot Options', and 'Online Booking Form Options'. A sub-header indicates the configuration is for 'Khot's Dental Excellence location'. There are two tabs for 'New Patient' and 'Existing Patient', with 'New Patient' selected. 'Preview' and 'Save' buttons are visible in the top right. The configuration is divided into several sections:

- Document Uploads:** A toggle is turned on. It lists document types: Patient Photo, Driver's License, Insurance Card (Front), and Insurance Card (Back), all with their respective toggles turned on. An 'OCR Reader' option is listed as 'Coming Soon' with a toggle turned off. A note states 'Automatically extract data from uploaded documents'.
- Insurance (Payer) Name:** A toggle is turned on. It features a field with 'Delta Dental' and an 'Add Insurance (Payer) Name' button. Below it, another field is empty with its toggle also turned on. An 'Insurance message (optional)' text area contains 'Test msg from ins payer' and a character count of '23/500 characters'.
- Credit Card Capture:** A toggle is turned on. It includes a 'PDDS Pay Only' label and a 'Capture Message' text area containing 'No Show' with an '8/500 characters' limit.
- Custom Notes:** A toggle is turned on. It has an 'Add Section' button and two note sections: one with 'test' and another with 'test2', both with their respective toggles turned on.

Document Uploads

Allow patients to upload documents during the booking process.

Document Types available:

- **Patient Photo** — Patient's profile photo
- **Driver's License** — For identity verification
- **Insurance Card (Front)** — Front side of insurance card
- **Insurance Card (Back)** — Back side of insurance card

Tip: Coming Soon: OCR Reader — Automatically extract data from uploaded documents.

Insurance (Payer) Name

Collect insurance information from patients during booking.

- Add multiple insurance payer names that patients can select from
- Enable/disable each payer for online booking with the "**Allows Booking**" toggle
- Add an optional **Insurance message** to display to patients (up to 500 characters)

Credit Card Capture PDDS Pay Only

Require credit card to reduce no-shows. When enabled, the booking form will request credit card information from the patient. This feature is used to **verify** if the patient's card is valid — **the card will not be charged**.

Patient Message: "To reduce no-shows, we require a valid credit card. Your card will not be charged at this time."

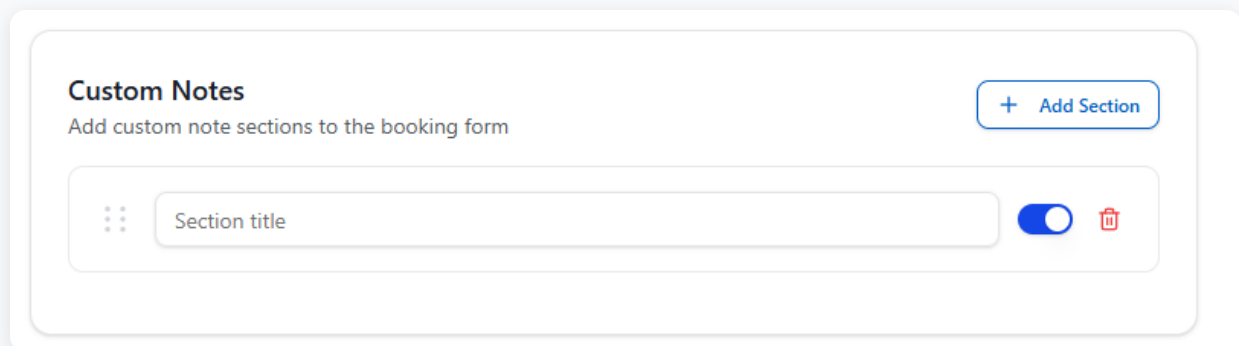
Capture Message: You can customize the message shown to patients (up to 500 characters). This message explains why a credit card is required.

How it works:

- The system performs a **card validation check** (no charge is made)
- Helps reduce appointment no-shows by confirming patient commitment
- Card information is securely processed
- If the card is invalid, the patient will be prompted to enter a valid card


Custom Notes

Add custom note sections to the booking form to collect additional information from patients.



Custom Notes
Add custom note sections to the booking form

+ Add Section

⋮ Section title 

Custom Notes Section Configuration

- Click "+ **Add Section**" to create new custom note fields
- Each section can be enabled/disabled individually
- Use custom notes to gather specific information relevant to your practice

Note: Use the **Preview** button to see how the booking form will appear to patients before saving your changes. Configure these options based on your practice's requirements for New Patient vs Existing Patient flows.

5. Forms Management

The Forms module in MyTooth allows your practice to create, organize, and manage all patient-facing forms digitally.

You can design new forms, group them into packets, and link them with your PMS to streamline patient intake and consent workflows.

5.1 Forms

Forms → Forms

Under the Forms tab, you can create and manage individual forms using the **Smart Form Creation Interface**.

The screenshot displays the 'Forms' management interface. On the left is a blue sidebar with navigation options: Forms, Scheduling, Activity, and Settings. The main content area shows a 'Forms' list view with tabs for 'Forms', 'Packets', 'PMS Consent Letter Mapping', and 'New Patient Forms Trigger'. Below the tabs are filters for 'Status' (All Status) and 'Public' (All), and a search bar. A '+ New Form' button is highlighted with a red box. The table below lists several forms:

Form Name	Public	Status	Form Scope	Form Type	Last Modified Date	Last Modified By
HIPAA Consent Form PD https://forms.dev.mytooth.io/yKpFrCfIqgGvUuD9r5uEHJMjUWqUf	Yes	Active	Organization	Other	Nov 28, 2025, 9:42 AM	Sharmila Khot
Anesthetic https://forms.dev.mytooth.io/GXLSLxNvGEEeUdFuvvx2y3al5z4Y3	Yes	Active	Organization	Other	Nov 28, 2025, 7:56 AM	Sharmila Khot
TEST Form H https://forms.dev.mytooth.io/zFYs4CqzTzHzczSFH7CRpKtV97aJQz	Yes	Active	Organization	Other	Nov 27, 2025, 3:57 PM	Sharmila Khot
TEST HIPPA FORM A https://forms.dev.mytooth.io/mnNz2@8yPfdJGUEU93qFzYIMbwYX	Yes	Active	Organization	Other	Nov 27, 2025, 1:54 PM	Sharmila Khot
Time checking	Yes	Active	Organization	Other	Nov 27, 2025, 12:08 PM	Sharmila Khot

A context menu is open for the first form, showing options: Preview, Edit, Duplicate, Download PDF, Assign to patient, and Delete. The 'Assign to patient' option is highlighted with a red box.

Forms → Forms List View

Create & Manage

- **Create New Forms** — Build forms from scratch with customizable fields and templates
- **Preview Forms** — View how the form will appear to patients before publishing

- **Edit or Duplicate** — Modify existing forms or quickly clone a form to reuse its structure

Share & Distribute

- **Generate a Public URL** — Each form can be set as public to create a unique shareable link
- **Download as PDF** — Export completed forms for record-keeping
- **Delete** — Remove outdated or unused forms

Assign to a Patient:

- Search for an existing patient from your PMS (based on [Patient Matching Scope](#) setting — Organization or Location level)
- Assign the form directly to the patient
- Generate a **QR Code** that patients can scan to instantly fill out the form
- Or Else, send the form link via **SMS** or **Email**

Tip: Using QR codes is ideal for in-office form completion, while SMS or email links work best for pre-visit intake.

Detailed Forms User Guide

For step-by-step instructions on creating, editing, and managing forms, refer to the complete Forms User Guide:

[View Forms User Guide \(PDF\)](#)

5.2 Packets

Forms → Packets

Packets let you combine multiple related forms into a single, shareable set.

You can:

- **Group Forms** — Select multiple existing forms and include them in a new or existing packet
- **Share via Unique URL** — Each packet has its own public link for easy patient access
- **Edit or Delete Packets** — Update packet content as your workflow evolves
- **Assign to Patients** — Just like individual forms, packets can be sent via QR code, SMS, or email

Patient Requirement: Patients must complete **all forms** within a packet for it to be marked as completed.

5.3 PMS Consent Letter Mapping

Forms → PMS Consent Letter Mapping

PMS Smart Assist Item	Forms	Actions
HIPAA	No form assigned	✎ 🗑️
Consent Form 1	No form assigned	✎ 🗑️
Consent Form 2	No form assigned	✎ 🗑️
Consent Form 3	No form assigned	✎ 🗑️
Consent Form 4	No form assigned	✎ 🗑️

Forms → PMS Consent Letter Mapping

This feature allows you to map MyTooth forms with **Smart Assist items** in your PMS.

You can:

- View the **5 Smart Assist form types** available in your PMS (Consent Form 1-4 and HIPAA)
- **Map a MyTooth form** to any of these Smart Assist form types
- When a patient completes a mapped MyTooth form, the **associated Smart Assist item is automatically marked as completed** in your PMS

Auto-Sync: Once mapped, any MyTooth form completed by a patient will automatically update the corresponding Smart Assist record in your PMS.

5.4 New Patient Forms Trigger

Forms → New Patient Forms Trigger

The screenshot displays the 'New Patient Forms Trigger' configuration interface. It features a left-hand navigation menu with options for Forms, Scheduling, Activity, and Settings. The main content area includes a breadcrumb trail (Forms > New Patient Forms Trigger) and a search bar for triggers. Below the search bar is a table with the following columns: Location, Patient Type, Appointment Type, Providers, Form or Packet Type, Form or Packet List, and Actions. A single trigger is listed with the following details:

Location	Patient Type	Appointment Type	Providers	Form or Packet Type	Form or Packet List	Actions
Khot's Dental Excellence	New Patient	New Patient	Dr. Khan	Packet	New Pat Packet	[Edit] [Delete]

An '+ Add New Trigger' button is located in the top right corner of the table area.

Forms → New Patient Forms Trigger

This automation tool allows you to automatically assign forms or packets to new patients based on configurable criteria.

You can:

- **Create triggers** by clicking "+ Add New Trigger"
- **Define trigger conditions** — Location, Patient Type, Appointment Type, and Provider
- **Select a Form or Packet** to automatically assign when conditions are met

- **Edit or delete triggers** using the action buttons

How Auto-Assign Works

When a **new patient** books an appointment that matches your trigger conditions (location, appointment type, and provider), the selected form or packet is **automatically sent** to the patient — no manual action required.

6. Re-Sync

MyTooth keeps your data synchronized with your PMS through two methods:

Automatic Nightly Re-Sync

A scheduled re-sync runs **every night** to automatically keep your PMS and MyTooth data in sync. No action is required — this happens automatically.

Manual Re-Sync

If you need to sync immediately, you can manually trigger a re-sync using the **Sync** button located under:

Settings → PMS Authentication

When to use Manual Re-Sync: Use this when you've made changes in your PMS (new providers, updated appointment types, etc.) and need them reflected in MyTooth right away instead of waiting for the nightly sync.

6.1 What Gets Synced

During a re-sync, MyTooth will update the following data from your PMS:

Data Type	Description
Providers	Imported and updated all provider records from PMS
Provider Locations	Updates on which providers are linked to which locations

Data Type	Description
Provider Assignments	Refreshes each provider's assigned appointment types
Locations	Updates all office and location data
Appointment Types	Syncs appointment type list and associated production codes

Use the Sync button when:

- A new **provider or location** has been added in your PMS
- You've updated **appointment types or production mappings** in PMS
- You notice **schedule or provider changes** that aren't yet visible in MyTooth

6.2 Adding (Onboarding) a New OID

When your practice adds a new office under the same Practice Group (PGID) or needs to add an existing office to MyTooth, it must be onboarded into the MyTooth application as a new **Office ID (OID)**.

Steps to Onboard a New OID:

- 1 Contact Support**
Reach out to the MyTooth Support Team and request to add the specific office(s) of your PGID to your MyTooth account. Include the office name and PMS Office ID for faster processing.
- 2 Support Confirmation**
You will receive a confirmation email from Support once the requested office/location has been successfully added to MyTooth.
- 3 Log In as Organization Admin**
Sign in to your MyTooth Admin site using an Organization Admin-level credential. Only users with admin access can complete the onboarding process for new OIDs.

4

Perform PMS Sync

Navigate to `Settings → PMS Authentication` , then click the **Sync** button. This action will trigger a data refresh from your PMS.

5

Verify the New Location

After the sync completes, the newly added office will appear under

`Settings → Location Settings` . The new location and all related data —

including providers, appointment types, and communication details — will now be available within MyTooth.

Tip: After adding a new OID, review its communication settings, update the location logo, and confirm that all linked providers and appointment types appear correctly.

7. Logging Out

When you're finished using the MyTooth Admin site, it's essential to securely log out — especially if you're on a shared or public device.

To log out:

- 1 Locate your **Profile Icon** at the top-right corner of the screen.
- 2 You can either:
 - 3 **Hold** the profile icon, or
 - 4 **Click** the profile icon and choose **Log Out** from the dropdown menu

Done! Once logged out, you'll be redirected to the MyTooth login page.

Quick Reference: Data Sync Overview

This section outlines which data is synced from your PMS and what can be edited within MyTooth.

Screen / Module	Data Synced from PMS	Editable	Notes
My Profile	Not directly synced from PMS	Yes	User can update name, contact details, and profile photo
Organization Settings	Organization name, contact info, External PMS ID	Partial	Can edit logo and display info; core PMS details are read-only
Manage Users	Not synced automatically	Yes	Users must be added manually; roles and access managed in MyTooth
Communication Settings	DPC phone, transaction email, marketing email	No	Cannot override communication details per location
Location Settings	Location list, External Location ID and Name	Partial	Can update hours, logos, secondary names; PMS-linked data is locked
Providers	Provider list with IDs, names, linked operatories	Partial	Can upload photos, change display names, assign appointment types
Provider Schedule	Working hours, holidays,	No	All scheduling data is read-only from PMS

Screen / Module	Data Synced from PMS	Editable	Notes
	operatories, locations		
Appointment Types	Fetched as per PMS production types	Yes	Can add, edit, delete; must map to PMS production code
Find Slot Options	Operator ID, Name, external location	Partial	Can enable/disable options and modify operator mapping
Forms & Packets	Not synced	Yes	Can create, edit, preview, duplicate, assign, or delete forms and packets
Online Booking Form Options	Not synced	Yes	Can configure all booking form fields and options
PMS Consent Letter Mapping	PMS Smart Assist items (HIPAA, Consent 1-4)	Partial	Can map forms to Smart Assist items; list is read-only
New Patient Forms Trigger	Not synced	Yes	Can configure automated triggers based on conditions

Quick Reference: Must-Do Updates Before Going Live

These updates are **required** before your practice goes live with MyTooth.

Area	Task	Why It's Important
My Profile	Update your profile photo and contact details under Settings → My Profile	Ensures you have an organization admin role with correct information and access
Communication Settings	Verify your DPC Phone Number, Transaction Email, and Marketing Email	Guarantees appointment notifications and marketing communications reach the correct channels
Manage Users	Add staff, assign roles, and set location access	Ensures all authorized team members have the correct permissions before launch
Appointment Types	Create, update, or review appointment types and assign Production Types accordingly	Required for accurate scheduling and PMS data mapping. Each Appointment Type should be associated with a PMS Production Type.
Forms & Packets	Create and assign essential consent, HIPAA, and intake forms	Ensures patients can complete digital paperwork before visits
PMS Consent Letter Mapping	Map your MyTooth forms to PMS Smart Assist items (HIPAA, Consent Form 1-4, etc.)	Enables completed forms to sync with PMS Smart Assist correctly, which is critical for compliance

Area	Task	Why It's Important
Find Slot Options	Configure how MyTooth searches for available appointment slots on the Patient Facing Booking site	Controls slot matching logic (one-to-one, many-to-many, or fixed operatory) and settings like same-day booking
Online Booking Form Options	Configure the fields and options displayed on your online booking form	Customizes the patient booking experience and captures required information during scheduling

Form Submission Site

How patients access and complete digital forms

8. Overview

The Patient Form Submission Site allows patients to complete digital forms before their appointments. This streamlines the check-in process and ensures all necessary paperwork is completed ahead of time.

Forms and Packets can be shared with patients in two ways:

- **Direct Assignment** — Assign forms directly to a specific patient (see [Section 5.1 Forms](#) and [Section 5.2 Packets](#))
- **Public URL** — Share a public URL or QR code for anonymous form submissions

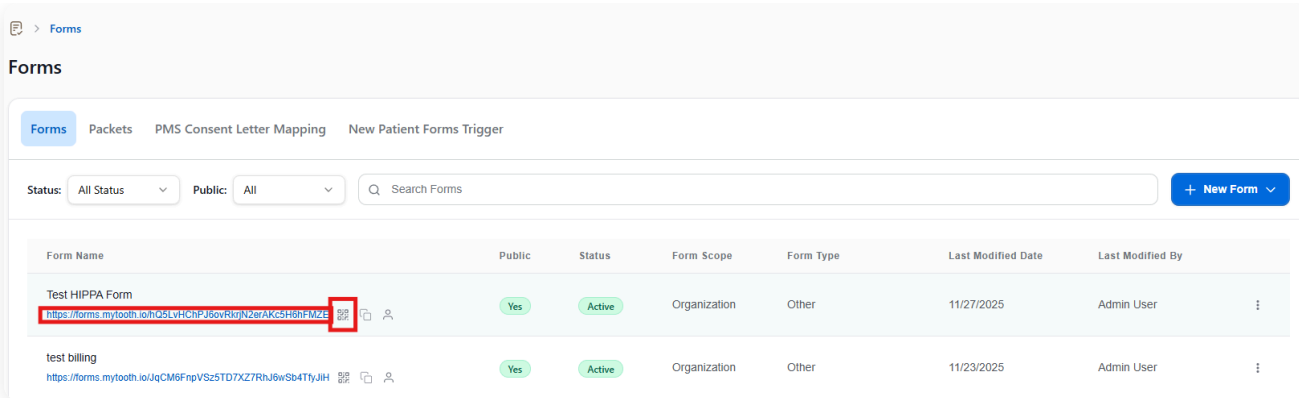
8.1 Public URL Submission

Public URLs allow anonymous patients (such as walk-in patients) to fill in forms without being assigned. You can share this URL via email, SMS, or any other medium.

How to Access the Public URL

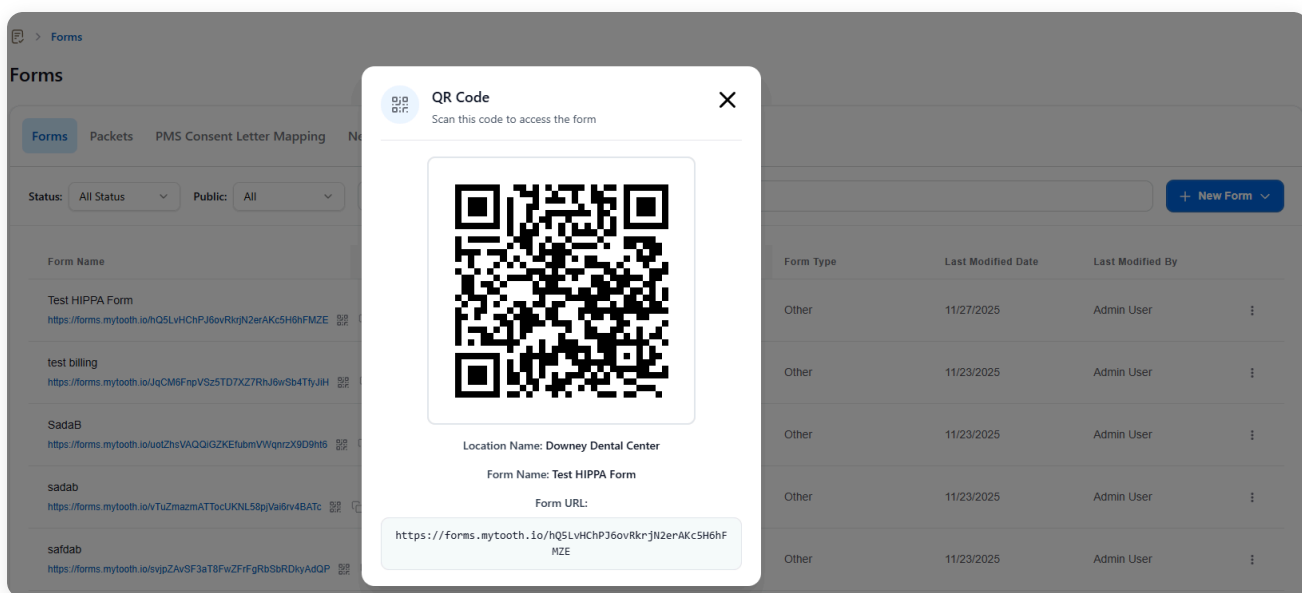
Each public form displays its URL directly below the form name. You can:

- **Copy the URL** — Click the Copy icon beside the URL
- **Generate QR Code** — Click the QR code icon to display a scannable QR code



Public URL and QR Code Icon Location

Clicking the QR code icon opens a modal with the scannable QR code and form URL:



QR Code Modal with Form URL

Patient Experience

When a patient accesses a form via public URL, they will see the **Patient Demographic Information** screen:

Patient Demographic Information

Patient's First Name*

Patient's Last Name*

Date of Birth*

Telephone number*

Email*

Gender*

How did you hear about us?*



Patient Demographic Information Screen (Public URL)

The patient must provide their demographic data. Based on the [Patient Matching Criteria](#) and [Patient Matching Scope](#) settings in Organization Settings:

If a Matching Patient is Found

The system will display: *"We already found you in the system as "name""*

If multiple patients match the criteria, the user can choose from the possible matches.

If No Match is Found

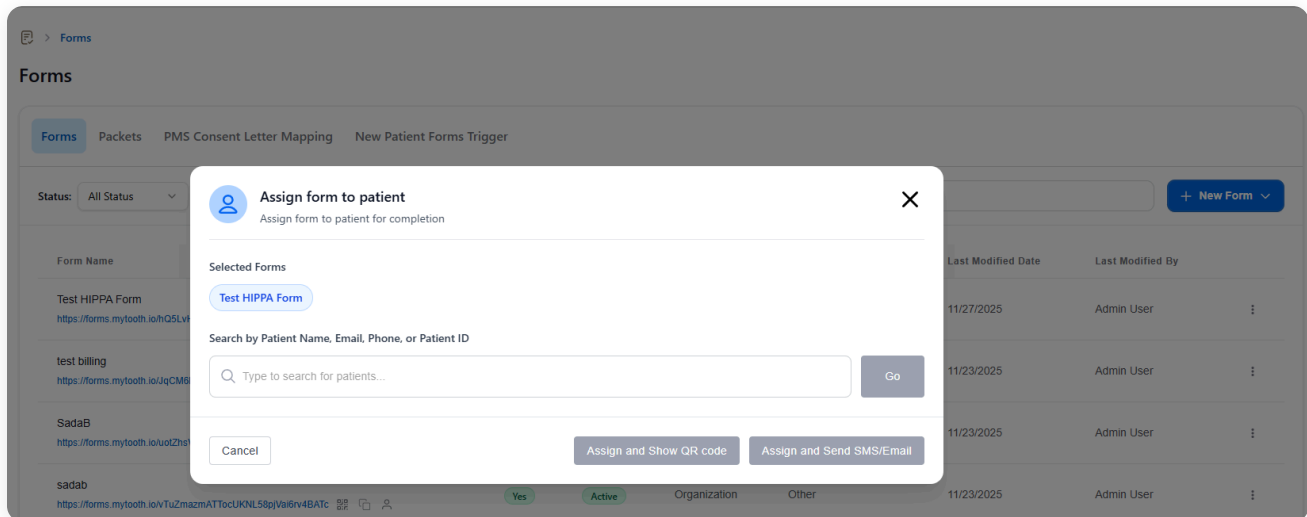
A new patient will be created in the PMS upon form submission using the provided demographic data.

8.2 Assigned Form Submission

Forms can be assigned directly to a specific patient from your PMS. This creates a unique magic link for that patient.

How to Assign a Form to a Patient

Click the **Assign to Patient** icon (3rd icon beside the Public URL) to open the assignment modal:



Assign Form to Patient Modal

To assign a form:

- 1 Search for a patient by **Name, Email, Phone, or Patient ID**
- 2 Select the patient from the search results
- 3 Choose how to share the form:
 - 4 **Assign and Show QR Code** — Generates a QR code for the patient to scan
 - 5 **Assign and Send SMS/Email** — Sends the form link directly to the patient

Patient Experience

When a patient accesses their assigned form via email, SMS, or QR code scan, they will see a **Verify Patient Details** screen:

Verify patient details

First name* Last name*


Patient date of birth*

Verify Patient Details Screen (Assigned Forms)

Important: The details entered must match the assigned patient's information, as the magic link is uniquely generated for that specific patient.

8.3 Completing Forms

After verification, the patient will see the number of forms assigned to them:



Please fill out the forms

Forms for Patient test test 0 of 1 >

Forms Assigned to Patient

To complete forms:

- 1 Click on a form to open it
- 2 Fill in the required form data
- 3 Click **Next** to proceed through each form page
- 4 Click **Submit Form** when you reach the final page

After Submission: For new patients, a patient record is automatically created in your PMS. The form submission activity is updated in MyTooth — check [Section 3: Activity](#) to view submissions.

PDF in PMS: Completed forms are automatically rendered as a PDF and added to the patient's notes in your PMS. You can open and view the PDF from the PMS Patient Notes section.

Booking Site

How patients book appointments online

9. Overview

The Patient Booking Site enables patients to schedule appointments online at their convenience. Each location in your organization has a unique booking URL that integrates directly with your PMS scheduling system.

9.1 Accessing the Booking URL

Each location has its own unique Booking Site URL. You can find these URLs under:

Settings → Locations

Organization **Locations** Communication Manage Users My Profile PMS Authentication

My Locations

Logo	Location Name	Address	Phone	External Location ID	External Location Name	Actions
	Downey Dental Center https://booking.mytooth.io/nPA...	1441 E. Composite Blvd., Downey, CA, 90240	562-922-5444	104	Downey Dental Center	
	LSDA https://booking.mytooth.io/IMA...	1225 E 1st St, Duluth, AL, 55805	218-728-6445	107	LSDA	
	Organic Dentistry https://booking.mytooth.io/mUq...	1414 Michaelson Avenue Suite 900, Downey, ...	218-433-8933	101	Organic Dentistry	
	Smile Haven Dental https://booking.mytooth.io/s2L...	8745 S. Gale Ave., City Of Industry, CA, 91748	626-678-9879	102	Smile Haven Dental	

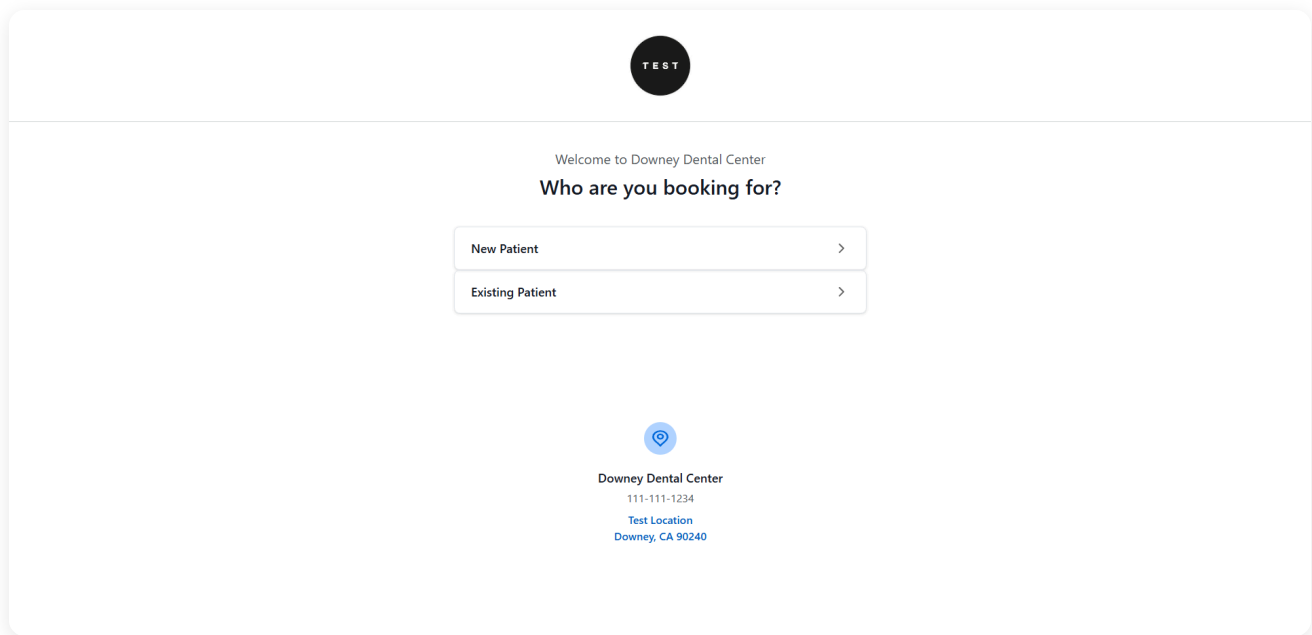
Showing 1 to 4 of 4 locations

Location Settings with Booking URLs

Click the **Copy icon** beside any location URL to copy it. You can share this URL on your website, emails, social media, or any marketing material.

9.2 Booking Landing Page

When a patient visits the booking URL, they will see the landing page:



Patient Booking Landing Page

The landing page displays:

- Your **location logo** at the top
- Your **location address** at the bottom
- Options for **New Patient** or **Existing Patient** booking

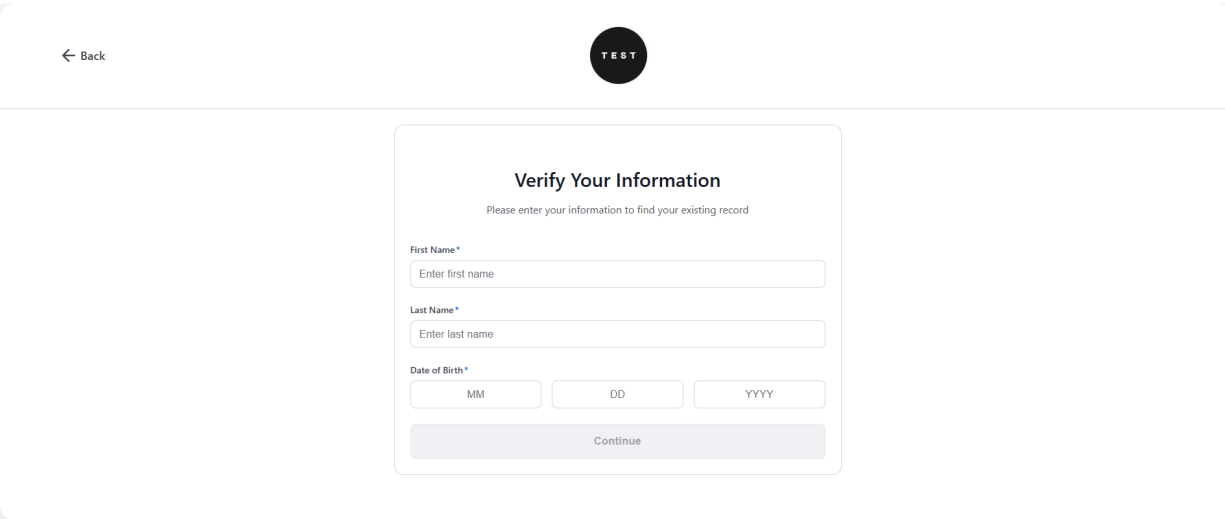
9.3 New Patient vs Existing Patient

New Patient Booking

New patients proceed directly to the **Select Appointment Type** screen without verification.

Existing Patient Booking

Existing patients must first verify their information:



← Back

TEST

Verify Your Information

Please enter your information to find your existing record

First Name*
Enter first name

Last Name*
Enter last name

Date of Birth*
MM DD YYYY

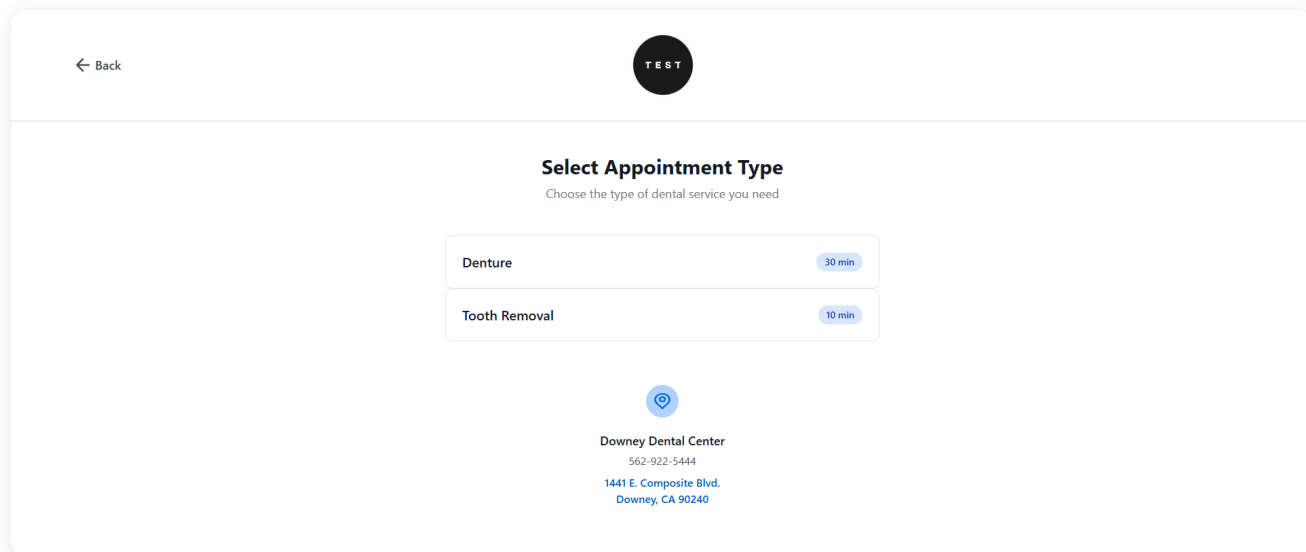
Continue

Existing Patient Verification Screen

If verification fails, a **"No Match Found"** modal appears with the option to continue as a new patient.

9.4 Select Appointment Type

After verification (or selecting New Patient), patients see the appointment type selection screen:



← Back


TEST

Select Appointment Type

Choose the type of dental service you need

Denture 30 min

Tooth Removal 10 min

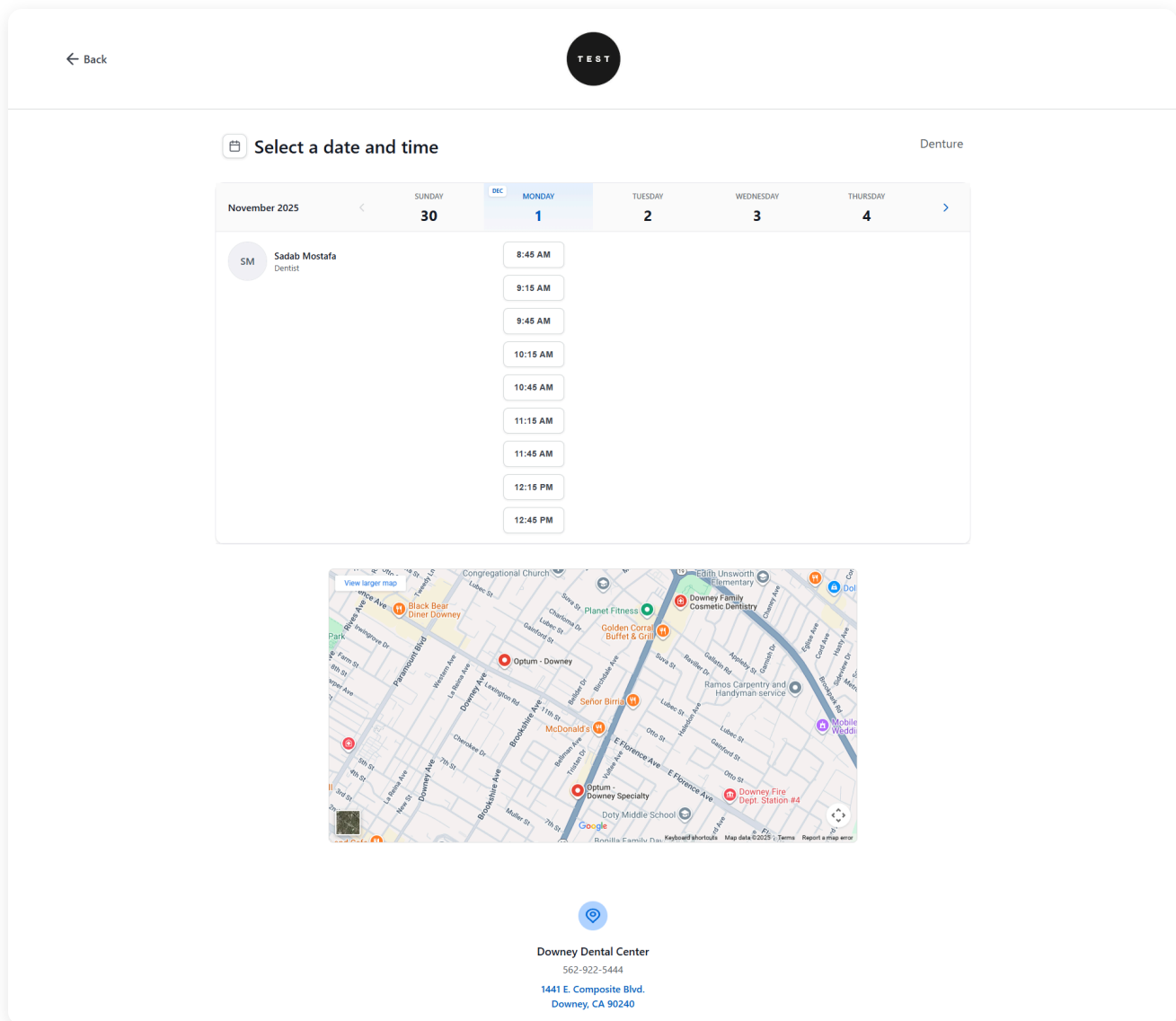

Downey Dental Center
562-922-5444
1441 E. Composite Blvd.
Downey, CA 90240

Select Appointment Type Screen

Note: The appointment types displayed here are based on your configuration in [Section 4.1 Providers](#) and [Section 4.3 Appointment Types](#).

9.5 Select Date and Time

After selecting an appointment type, patients choose their preferred date and time:



Select Date and Time Screen

Patients can:

- View available slots based on your [Section 4.4 Find Slot Options](#) configuration
- Click the **calendar icon** beside "Select a date and time" to pick a specific date
- Use the **left/right arrows** to navigate between weeks

Tip: All available slots shown here are pulled directly from your PMS based on the Find Slot Options settings you configured.

9.6 Patient Information

After selecting a time slot, patients are taken to the information screen:

← Back

TEST

Book your appointment

Appointment Details Hide ^

Appointment Type
Denture
Date & Time
Monday, December 1, 2025 at 8:45 AM
Location
Downey Dental Center
1441 E. Composite Blvd., Downey, CA, 90240
Provider
Sadab Mostafa

Who are you booking for?

Myself Child or dependent

Patient Details Hide ^


First name*
sdsa
Last name*
dasda
Date of birth*
12/12/2000
Gender*
Telephone number*
Email*
How did you hear about us?*

Dental Insurance Hide ^

Name of Insurance
Subscriber Name
Subscriber/Member ID
Group #

By providing a mobile number, I agree that Downey Dental Center may send me **Patient Care Related Messaging** at the number I provided above. I understand my consent is not required for purchase. Messages Frequency will vary. Msg & data rates may apply. Reply HELP for help or STOP to cancel.

Book your appointment


Downey Dental Center
562-922-5444
1441 E. Composite Blvd.
Downey, CA 90240

Patient Information Screen

The fields displayed on this screen are based on your [Section 4.5 Online Booking Form Options](#) configuration.

For Existing Patients

Patient Details (First Name, Last Name, Date of Birth) are pre-filled based on the verification information provided earlier.

Patient Matching: Even if a patient selects "New Patient" but provides details that match an existing patient in your PMS, the appointment will be booked for the existing patient instead of creating a duplicate record.

9.7 Booking Confirmation

After providing consent and clicking "**Book Your Appointment**", patients see a confirmation page with:

- Appointment details (date, time, location, provider)
- Patient information summary

Confirmation emails are automatically sent to both the patient and the office email address.

9.8 PMS Integration

When an appointment is successfully booked, it syncs directly with your PMS:

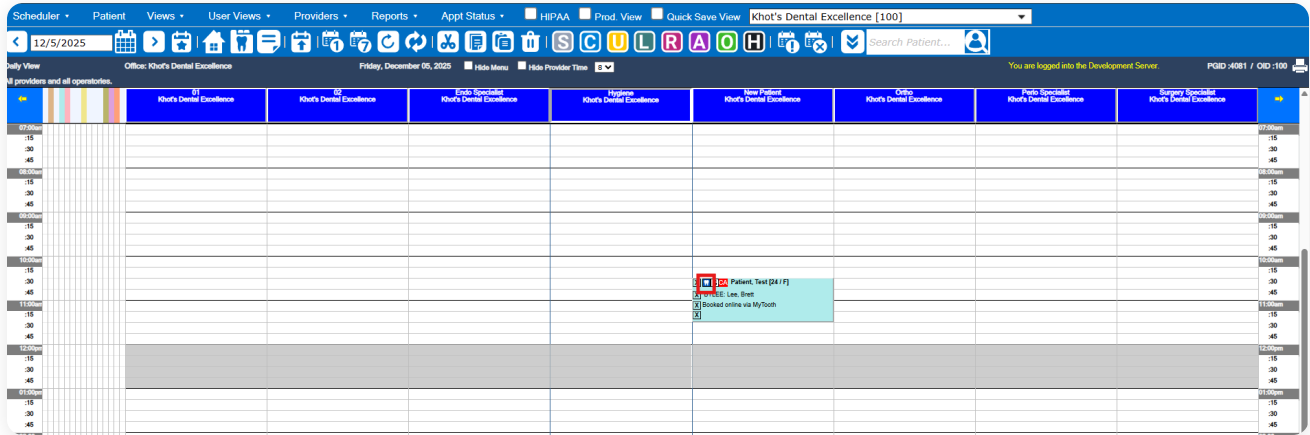
Patient Type	PMS Action
New Patient	A new patient record is automatically created in your PMS
Existing Patient	Appointment is linked to the existing patient record

For both new and existing patients:

- The appointment slot is booked with the scheduler — same as PMS booking functionality
- Notes are also added to the patient

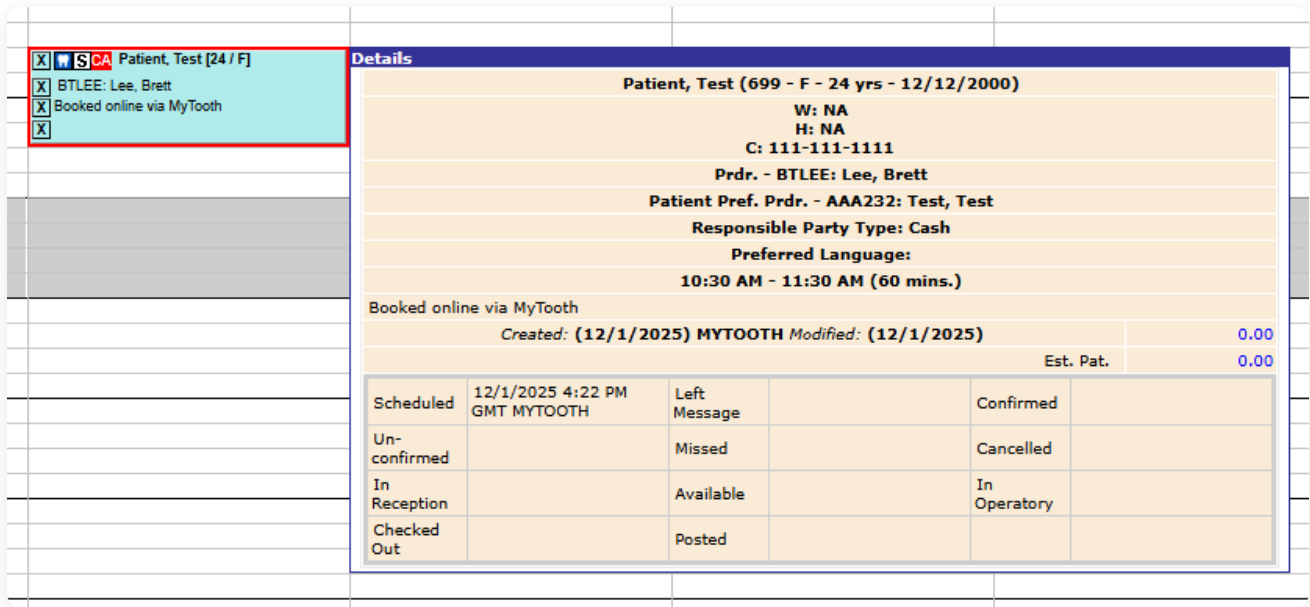
Identifying MyTooth Bookings in PMS

Appointments booked via MyTooth display the **MyTooth logo** on the scheduler slot, making them easy to identify:



Scheduler Showing MyTooth Booked Appointment

Clicking on the booked slot opens the appointment details, where you can see a note indicating it was **booked online via MyTooth**:



Appointment Details Showing MyTooth Booking Note

Booking Form Data in System Notes

After a booking is completed, the booking form data is automatically stored as **System Notes** with a **"MyTooth Created"** date label for that patient:



Tip: The MyTooth logo on scheduler slots makes it easy to distinguish between appointments booked online through MyTooth and those scheduled directly in the PMS.

PMS Integration

Access MyTooth features directly from your Practice Management System

10. MyTooth in PMS

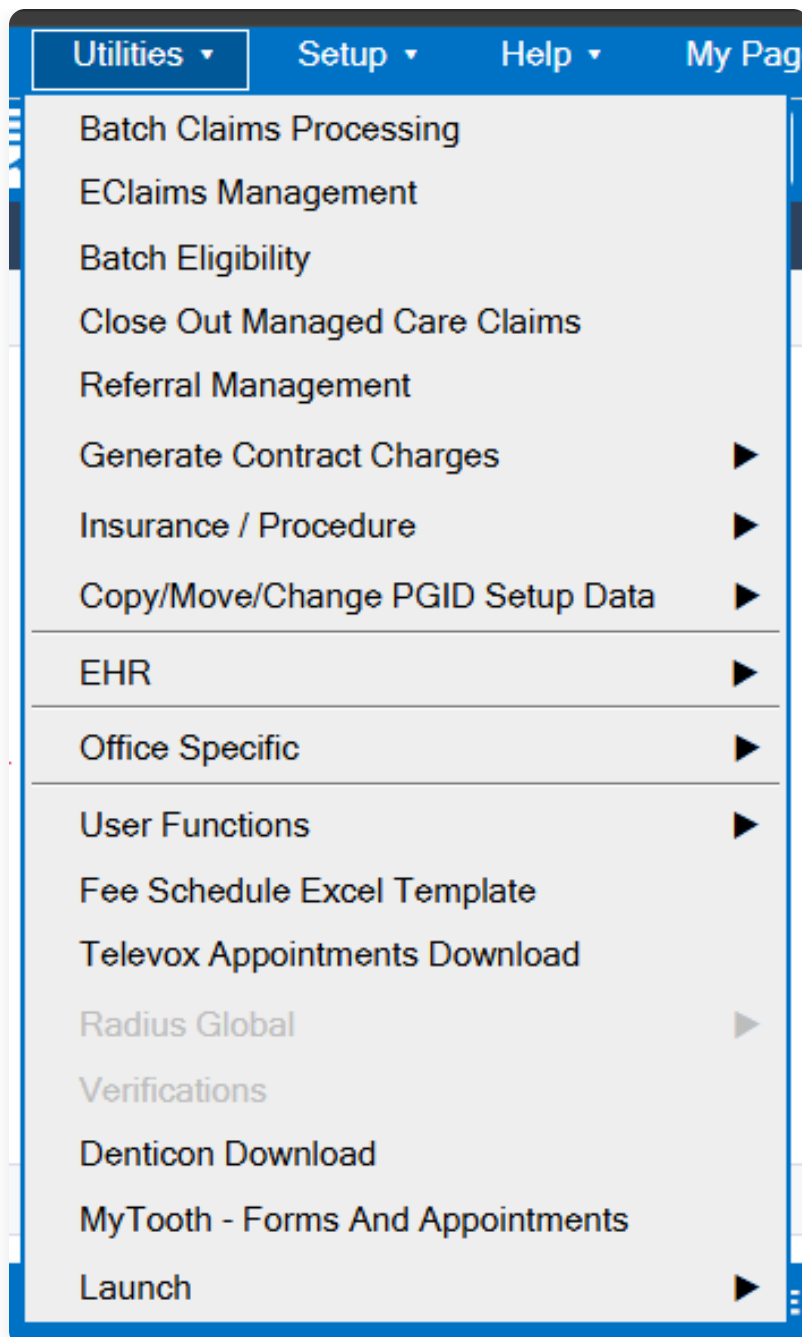
Certain MyTooth features can be accessed directly from within your Practice Management System, making it easier to share forms with patients during their visit without leaving your workflow.

10.1 Viewing MyTooth Activity

Similar to the [Activity section](#) in the MyTooth Admin Portal, you can view MyTooth activity directly from your PMS.

Accessing via Utilities Menu

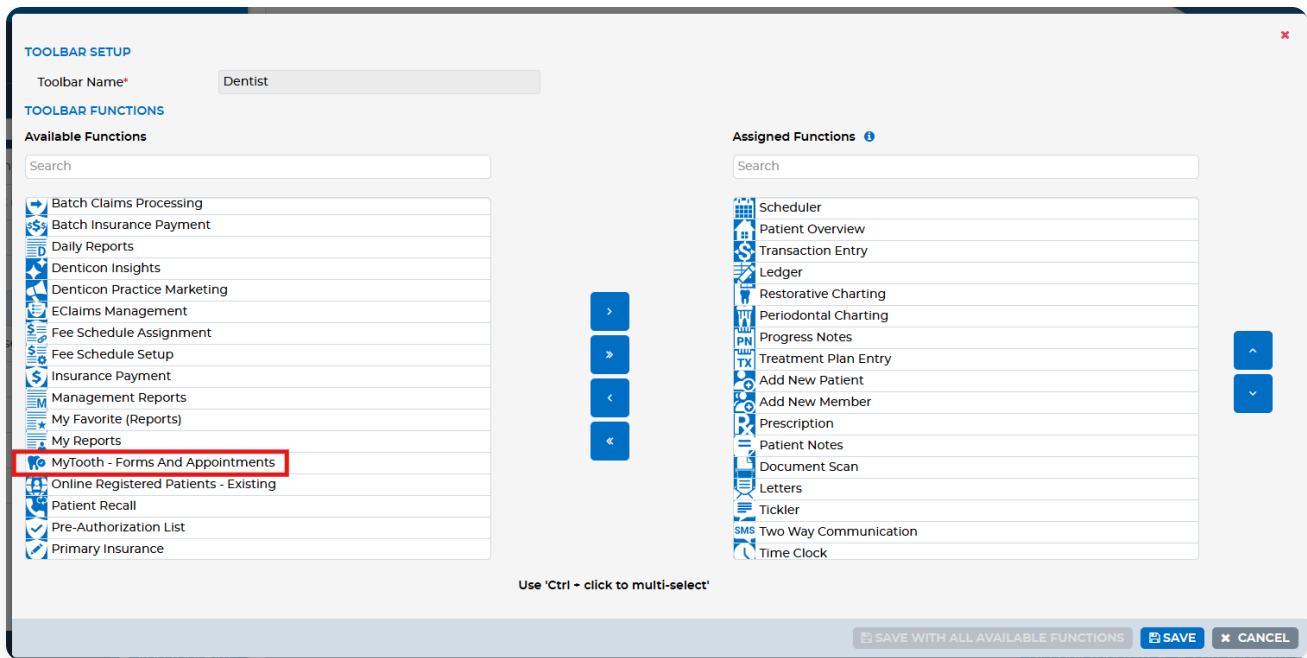
Navigate to the **Utilities** menu and click on "**MyTooth - Forms and Appointments**":



MyTooth Option in Utilities Menu

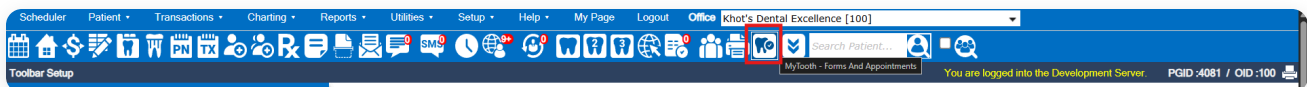
Adding to Custom Toolbar

For quicker access, you can add MyTooth to your toolbar. Go to **Setup** → **Custom Toolbar** and add "**MyTooth - Forms and Appointments**":



Adding MyTooth to Custom Toolbar

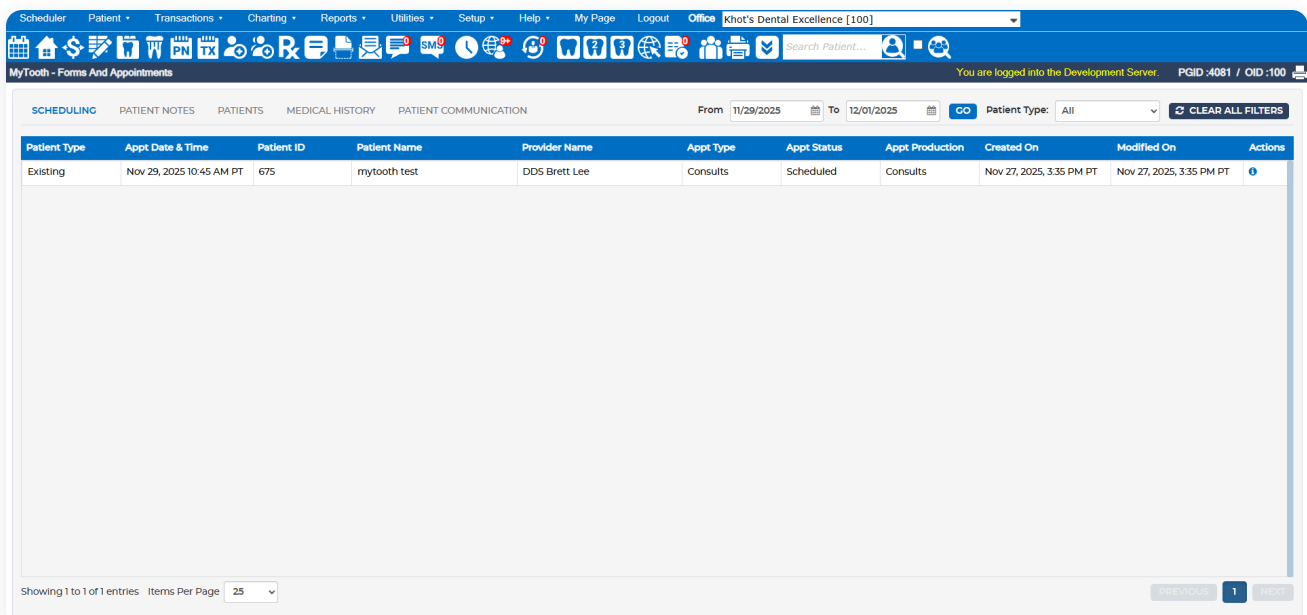
Once added, the MyTooth option will appear in your toolbar for one-click access:



MyTooth Button in Toolbar

MyTooth Activity Screen

Clicking either option opens the MyTooth Activity screen within your PMS:



MyTooth Activity Screen in PMS

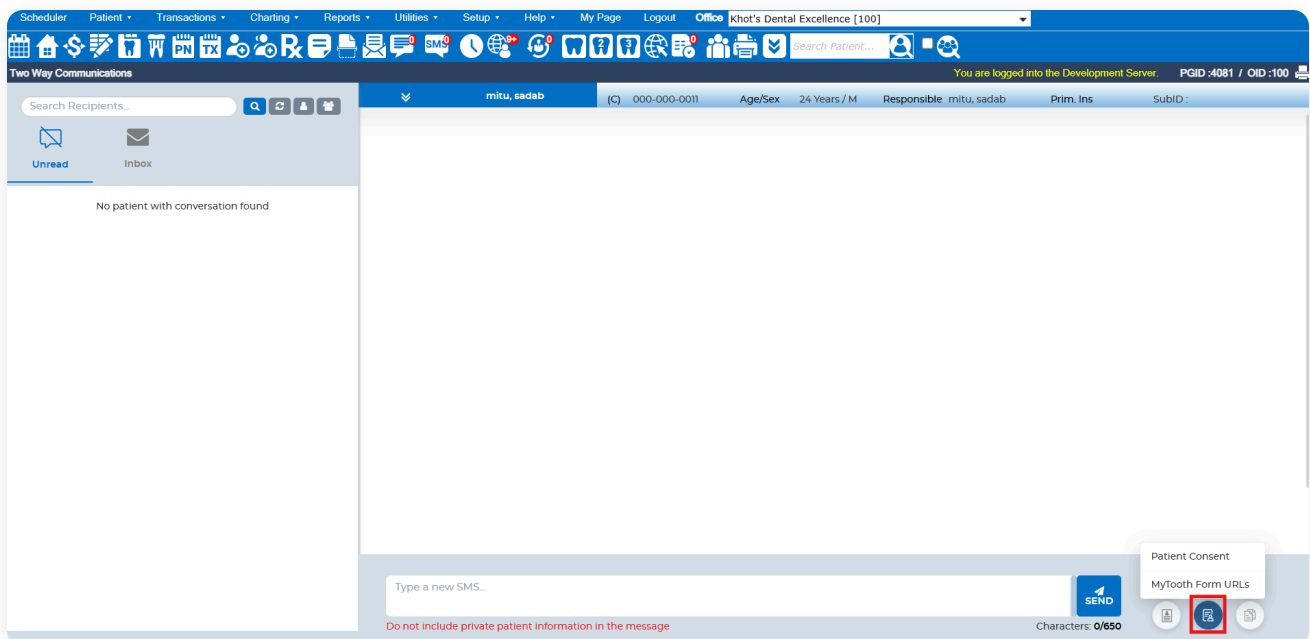
From this screen, you can view:

- **Scheduling** — Appointment bookings made through MyTooth
- **Patient Notes** — Notes submitted via forms
- **Patients** — New patients created through MyTooth
- **Medical History** — Medical history form submissions
- **Patient Communication** — Communication logs and form assignments

Note: This provides the same activity information as [Section 3: Activity](#) in the MyTooth Admin Portal, allowing you to monitor MyTooth activity without leaving your PMS.

10.2 Two Way Communications

From the **Two Way Communications** screen in your PMS, you can access MyTooth forms directly.



Two Way Communications with MyTooth Options

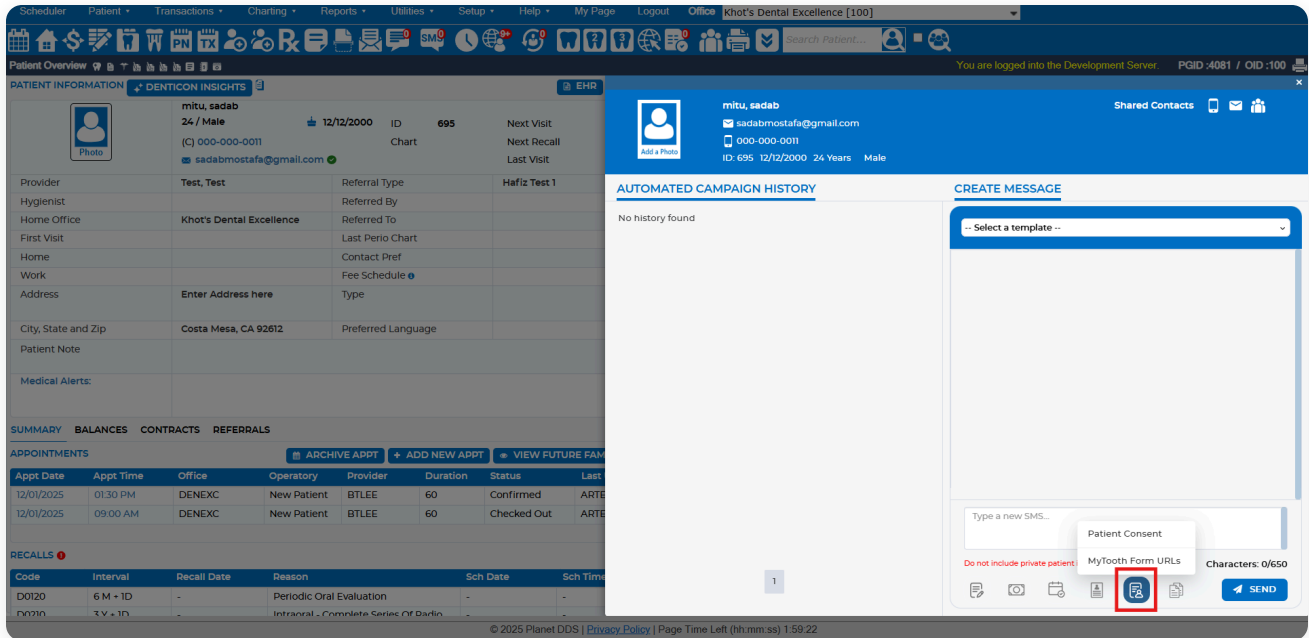
When you hover over the **Previous Consent Letter** button, two options appear:

- **MyTooth Form URLs** — Access public form URLs and assign forms to patients

- **Patient Consent** — View existing patient consent Forms

10.3 Messaging Hub

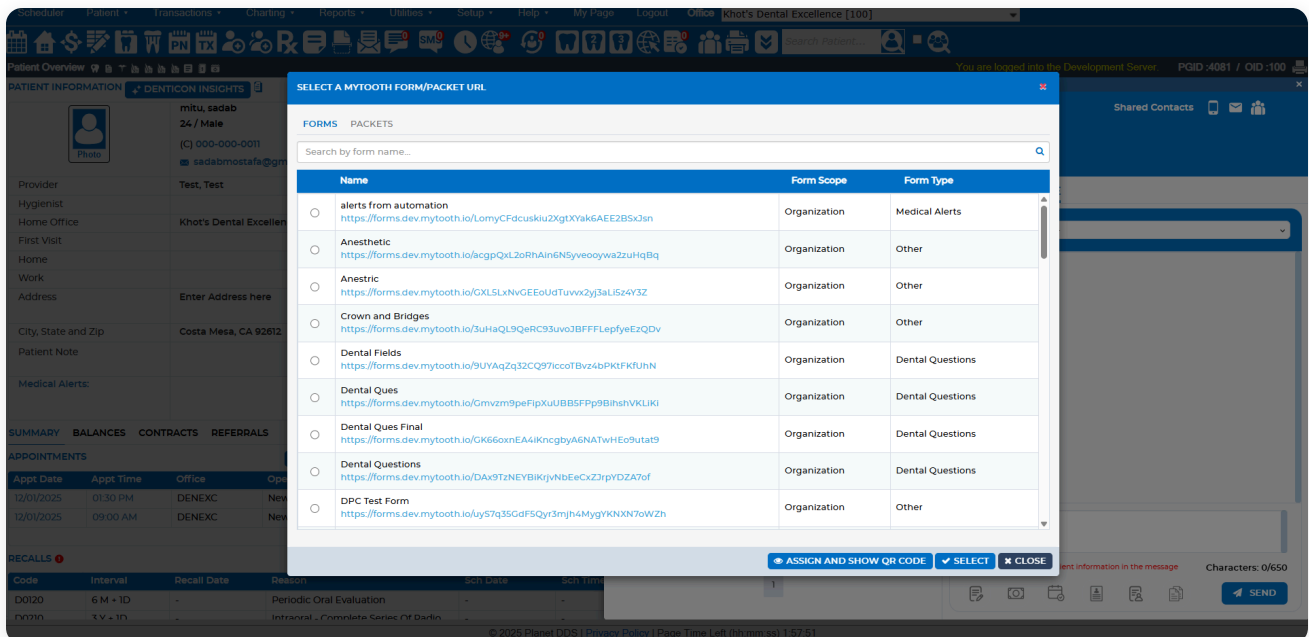
The same MyTooth options are also available from the **Messaging Hub** modal in your PMS:



Messaging Hub with MyTooth Options

10.4 MyTooth Forms Modal

Clicking "**MyTooth Form URLs**" from either Two Way Communications or Messaging Hub opens the MyTooth Forms modal:



From this modal, you can:

- **Open Public URLs** — Access public URLs for both Forms and Packets
- **Generate QR Code** — Assign a form to the current session patient and generate a QR code for them to scan
- **Select and Send URL** — Click the **Select** button to generate a patient-specific URL that is automatically posted into the text box

Tip: Use the generated URL to send forms directly to patients via SMS or email. Once the patient receives the link, they can complete the form submission journey as described in [Section 8: Form Submission Site](#).

10.5 DPC Best Practices for MyTooth

This section helps you optimize your Denticon Patient Communication (DPC) settings to work seamlessly with MyTooth, your dental appointment booking and forms application.

Important: These steps are recommended best practices, not requirements. MyTooth already automatically sends confirmation messages and form links whenever:

- A patient books an appointment
- You assign and send a form or packet to a patient

Following these recommendations will enhance your patient communication experience.

Configuring MyTooth URLs in Office Setup

Before using MyTooth URLs in your automated campaigns, you can configure them centrally in Office Setup. This allows you to manage all your MyTooth public URLs for forms and patient-facing sites in one place.

Step 1: Access Office Setup Integrations

Navigate to **Office Setup** → **Integrations**

The screenshot shows the 'Office Setup - Integrations' page in the Denticon software. The interface includes a top navigation bar with various icons and a search bar. On the left, there is a sidebar with a search function and a list of office locations. The main content area is divided into several sections: 'SERVICE EMAIL', 'AI ASSIST', 'PATIENT COMMUNICATION URLS', 'DENTICON INSIGHTS', 'DENTIRAY', 'PLANET DDS PAY', 'DOSESPOT', and 'PAYMENT PORTAL - ACCEPTED CREDIT CARDS'. The 'PATIENT COMMUNICATION URLS' section is highlighted with a red box and contains a table with the following rows:

URL Type	Value
Patient Forms URL	
Online Scheduling URL	
Financing URL	
Custom URL 1	
Custom URL 2	

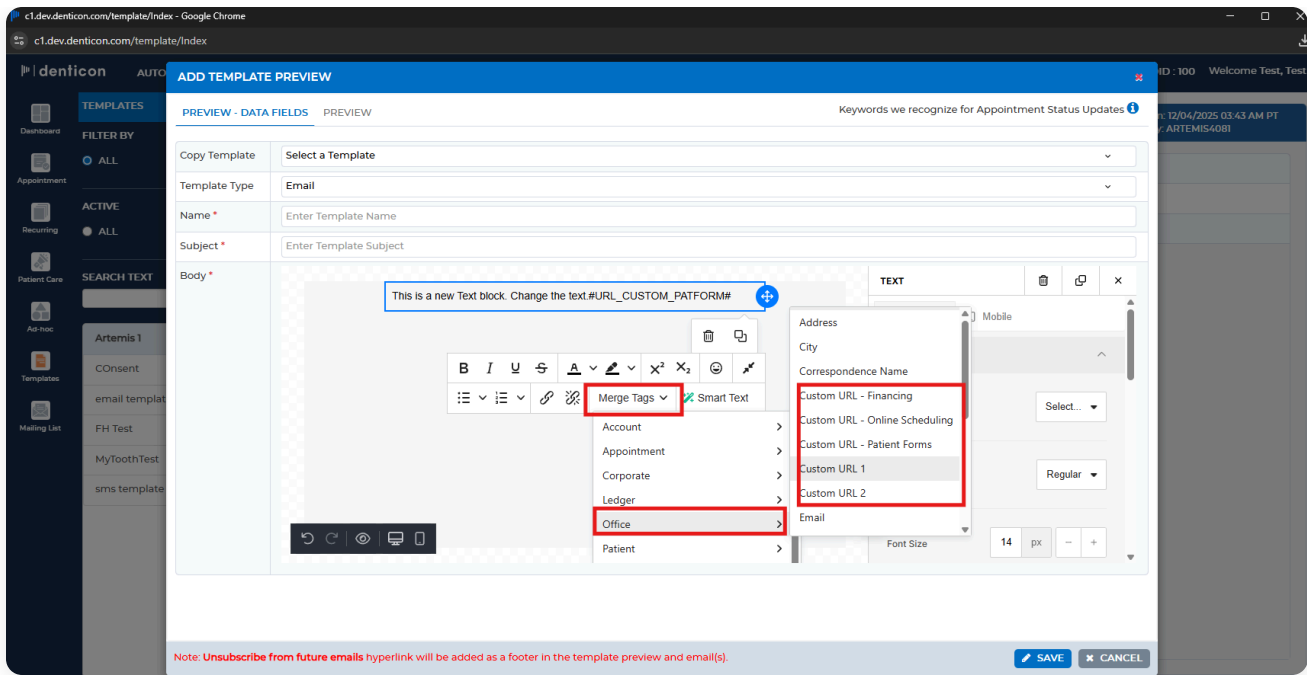
Office Setup → *Integrations* - Configure MyTooth URLs

From this screen, you can:

- Add MyTooth **public URLs** for different forms
- Configure URLs for **patient-facing sites** (Booking Site, Form Submission Site)
- Manage URLs per office location

Step 2: Use Configured URLs in Campaigns via Merge Tags

Once URLs are configured in Office Setup, you can easily insert them into your DPC templates using **Merge Tags**. The merge tags will automatically pull the URLs you configured for each office.



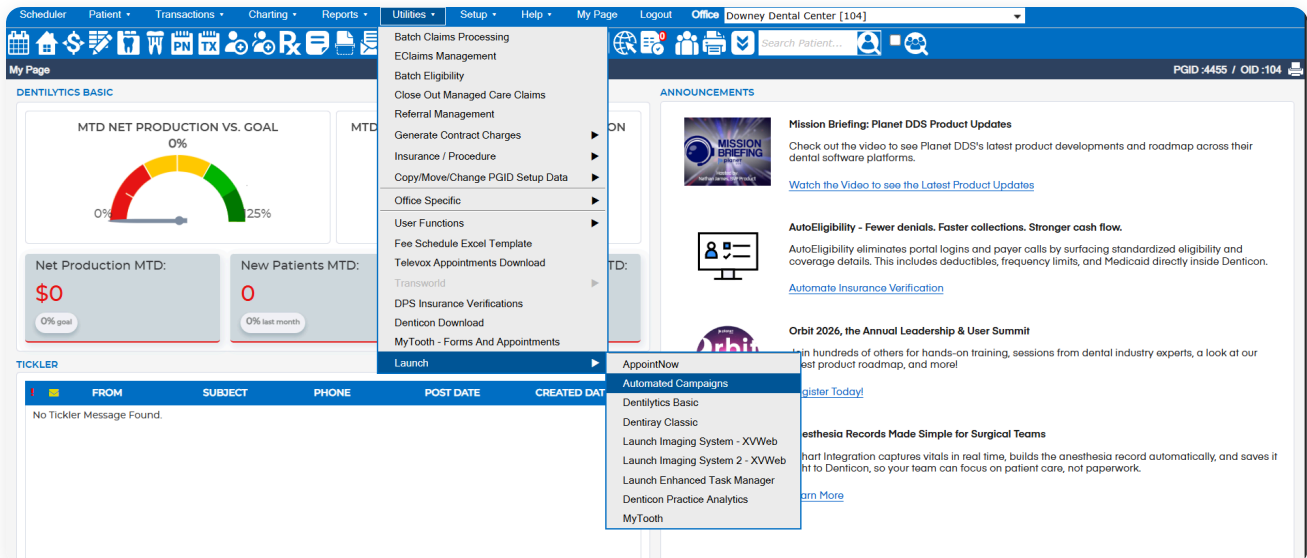
Using Merge Tags to Insert Configured MyTooth URLs

Benefit: When you update a URL in Office Setup → Integrations, all campaigns using that merge tag will automatically use the updated URL — no need to edit each template individually!

Accessing Automated Campaigns

Step 1: Access Automated Campaigns

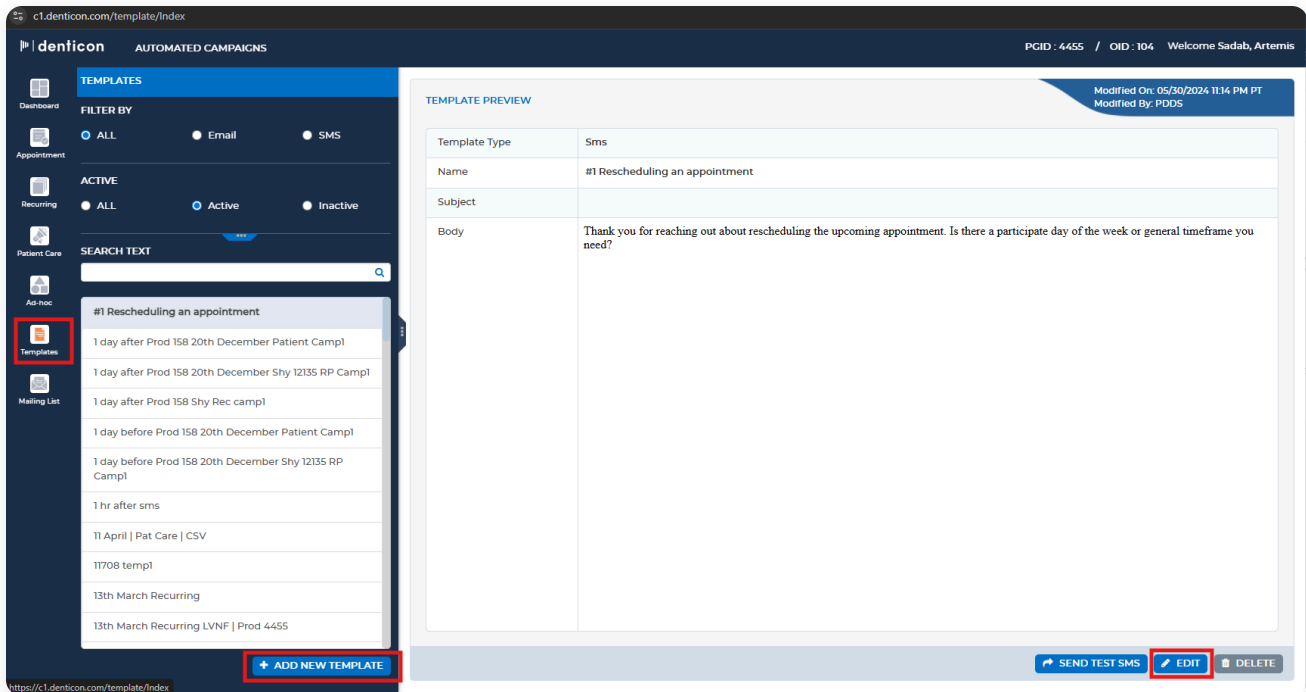
Navigate to **Utilities** → **Launch** → **Automated Campaigns**



Main Navigation Menu - Path to Automated Campaigns

Step 2: Open Templates

Click on **Templates** and then create new or edit an existing one



Automated Campaigns screen with Templates option

Adding MyTooth Form Links

The process differs slightly depending on whether you're working with SMS or email campaigns.

For SMS Campaigns

- 1 Open your template in edit mode
- 2 Locate the **Merge Tags** option
- 3 Select **URL**
- 4 Choose **MyTooth** from the menu

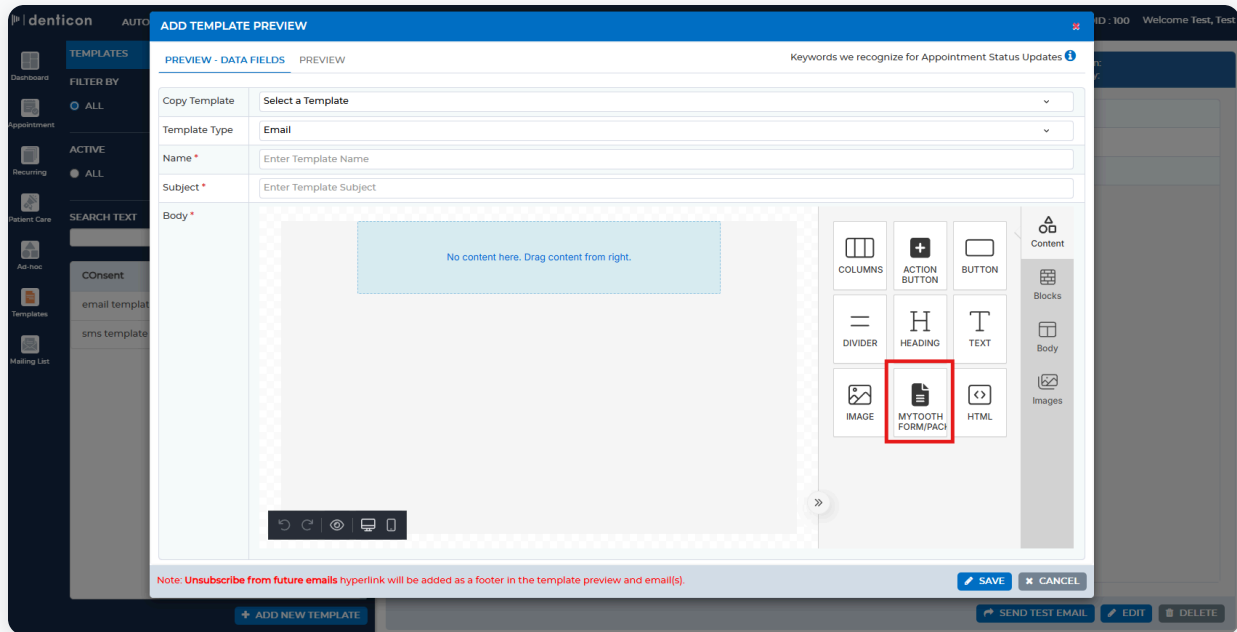
 SMS Merge Tags for MyTooth

SMS Template Editor - Merge Tags → URL → MyTooth

This will insert the MyTooth form link into your SMS message:

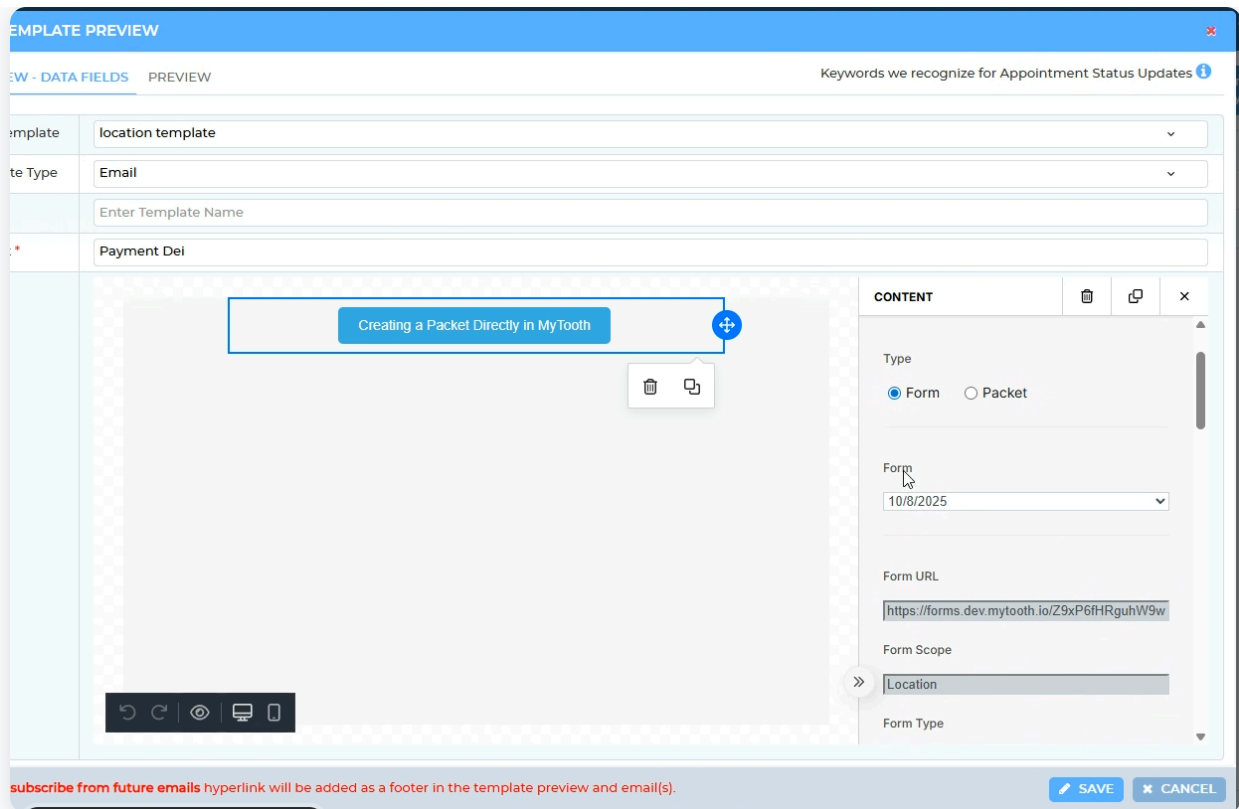
For Email Campaigns

When creating or editing an email template, the **MyTooth Form/Package** option is available in the content side panel:



MyTooth Form/Pack Option in Email Template Editor

- 1 **Drag** the "MyTooth Form/Pack" option from the content panel into your template
- 2 A side panel will open allowing you to **choose a Form or Packet**
- 3 Select your desired form — the URL will be **automatically embedded** in a button
- 4 Save your template



MyTooth Form Button Added to Email Template

From the side panel, you can change the form or packet URL, and modify the button colors or label to match your branding.

How it works: When the automated campaign sends the message, patients can click the embedded link/button to open the form and complete their submission journey — no manual form assignment required!

Replacing Existing Consent Form URLs

If your campaigns already contain consent form URLs, replace them with the updated MyTooth URLs by following the steps above. This ensures patients always receive links to your current MyTooth forms and packets.

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