



INSTRUCTIONS: CREATING AND MANAGING TEMPLATES

Submitting a case from a template is the best and most efficient way to submit a case using DynaFusion. As a registered user, your team has the ability to create, delete and manage templates. Also, our expert design team is willing and ready to work with your office to create your templates, free of charge.

WHAT IS A TEMPLATE?

A template is part of the DynaFusion Digital RX system. Templates are pre-saved, Rx forms. In most cases, especially if created by the DynaFlex® Design Team, these templates are based off of your DynaFlex® "Master Prescriptions" that we have saved in our database. By saving your standard preferences, you will save time filling out future Rx forms. You can then use these templates with the saved information for new Rx forms you need to submit. Simply select the template and add the patient's information as well as any customizations needed for the appliance and submit your case.

HOW TO CREATE OR MANAGE A TEMPLATE

1. Select the "Create/Manage Templates" tab from the left of the page.
2. Notice the different prescription sections. For each of the different prescription options, if you have templates already saved, they will appear here as well.
3. To create a new template, you will select "Create New Template" at the top right-hand corner of the page.
4. Select the Rx form relevant for the template and select "Go".
5. From here you can fill out the prescription as you would for the specific appliance you are creating the template for. When creating a template, there is no need to include a patient name or date wanted as they will change with each case submission and will not save in your template.
6. Once you have completed the Rx, select "Save As New Template" at the top or bottom of the Rx form.
7. You will then be prompted to create a name for your template before saving. *NOTE: We recommend detailed naming. As you create more templates, this will be helpful.*

Quick FAQs:

Where do I find my Templates?

All of your saved templates will be saved under the Create/Manage Templates tab to the left of your screen. You have the ability to edit, delete, and/or add to your templates at any time.

Can I save a template from a case I'm working on?

Yes. You may also "Create/Save A Template" from a prescription you are filling out. On all Rx forms you will see "save as new template" at the top or bottom of the page. Simply fill out the Rx as needed for your patient. When complete, but before submitting, click the "Create/Save A Template" at the top or bottom of the Rx Form. Your Rx choices, work order comments and drawing will be saved by the name you give the template. *NOTE: The patient information does not save in templates as that information changes with every case.*

How do I submit an Rx for an appliance that has both a fixed and removable appliance needed?

If you want to save a template that has a fixed and removable appliance (e.g.: upper RPE/lower Schwarz) the General Ortho prescription is the best choice.