Adding or Adjusting Consent forms

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Overview

TDO comes with two built-in consent forms: the Financial Policy and the Privacy Policy. You can easily add more consent forms in a few steps.

Detailed Instructions

How to add a consent form category

Go to **Program Setup>Policy/Consent>Categories**

Add a new category to the list. Example *"Consent for RCT"* or *"Consent for CBCT"*

Menu Options:

Fixed: This consent cannot be deleted
Show in Infograbber: The consent will show as an option to choose in infograbber
Show in TDO: The consent will be viewable in TDO
Show on website: When the patient logs into the office website, they will be able to view the consent form, however they cannot sign the form online
Required: The consent form is required for the patient to sign. See Note below.
Consent per tooth/patient: If it is set per tooth, then the consent form can be assigned to a certain tooth on the case presentation page.
Expire in Months: If you do not want the consent to expire, put 999.

How to add consent form text

Go to **Program Setup>Policy/Consent>'Text'**
In the drop-down menu at the top, select the Category in '**Policy Consent/Category'** field that you wish to add/edit text
Highlight the text for each policy consent and use the ***CTRL+C*** to copy from the Word doc and ***CTRL+V*** to paste the text in the big white box right below the '**Policy/Consent category**' field
Once you have the text for a consent, please make sure to hit the '**Save**' button
Then you can select another category in '**Policy/Consent Category**' field and repeat the steps above

Importance of using the Required Checkbox

Setup > Program setup > Policy/Consent > Categories
If no consent forms are marked as 'Required', when the patient comes into the office for their

appointment, it will show in TDO that all required consent forms have been signed (since nothing is required the requirement has been met). Please make sure to appropriately mark the consent forms that are required for each patient.

Please Note

If you make any changes to an existing consent form and click "save" there will be a pop up stating "**Changing the text will cause previously signed forms to be displayed as not signed under Case Presentation/Policy Consent Management. Do you wish to continue?**"

This simply means that if a patient signed the previous form, they will be prompted to sign the new updated form next time they are in the office. The old signature will not be removed.

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