

Cheat Sheet

Job Aid

What Is the Cheat Sheet?

The Cheat Sheet is a staff-facing patient summary that consolidates important patient information into one place, including:

- Patient demographics, including family and responsible party information
- Referral information
- Patient and responsible party preferences
- Insurance details, including plan priority and coverage estimates
- Medical history, including hygiene, medical conditions, allergies, and habits
- Exam results and doctor notes

How the Cheat Sheet Helps Your Team

Instead of navigating multiple screens, the Cheat Sheet displays everything staff needs to prepare for patient conversations.

The Cheat Sheet supports multiple roles, including:

Treatment Coordinators

Review insurance, payment preferences, and referral source before the consultation conversation.

Front Desk / Scheduling

Confirm responsible party details and flag family members already in treatment.

Doctors & Providers

Review medical history and patient priorities; record the exam outcome.

How to Access the Cheat Sheet

The Cheat Sheet can be accessed via two methods:

- **Option A:** By clicking the **CS** icon
- **Option B:** By clicking the **Action** dropdown arrow, and selecting **Cheat Sheet**

Configuration Demo - ...

RCM

☐ Today

☐ Tomorrow

☐ Upcoming

☒ Needs Attention 10

☐ Follow-Up 2

☐ Sign @ Home

☐ Insurance 2

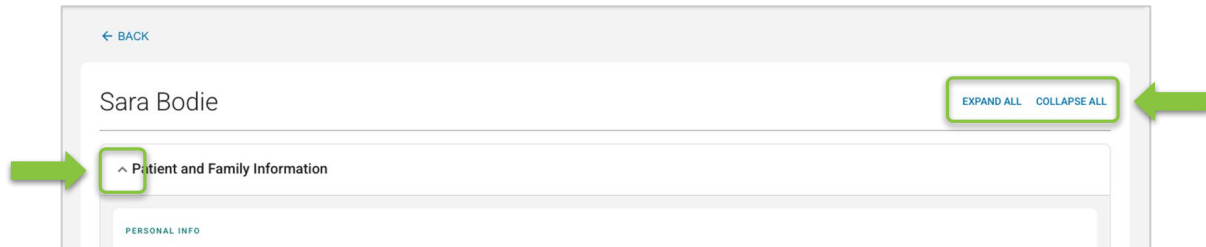
☒ OrthoFi Messages 0

Date	Type	T.C.	Patient	Age	Location	Status	Contacts	Reason	
02/02/2023 1:00 PM	New	T.D.	Rivers, Ashley	20.1	Nextdoor	P M I CS PP FD DP	PC Vivian Rivers change pc	Tx Recommended, No Follow-Up Set	Action

Navigating the Cheat Sheet

The Cheat Sheet organizes key patient information into collapsible and expandable sections for easy navigation.

- Click **Expand All** in the top-right corner to display all sections.
- Click **Collapse All** to hide all sections.
- Click **the arrow** in an individual section to expand or collapse it.



Cheat Sheet Sections

1. Patient and Family Information

This section consolidates patient and family information into one organized section with subheaders:

- **Personal Info:** Patient information
- **Responsible Party:** Responsible party information
- **Help Us Get to Know the Patient:** Treatment reason, referral information, hobbies, and details that help staff understand the patient
- **What's Important:** Key details about what is or may be important to the patient or responsible party, along with any additional relevant information

^ Patient and Family Information

PERSONAL (PATIENT) INFO

PERSONAL INFO

Name	Date of Birth	Age	Sex Assigned at Birth
Sara Bodie	09/09/1990	35	Female

RESPONSIBLE PARTY INFO

RESPONSIBLE PARTY

Name	Relation to Pt	Marital Status	Sex
Sara Bodie	Self	---	Female
Occupation	Employer	Credit Tier	
Lead Operation Technician	Strike Inc	No credit check	

GET TO KNOW THE PATIENT

HELP US GET TO KNOW THE PATIENT

Reason for Treatment:	Primary Referral:	Secondary Referral:	Hobbies
I'd like a perfect smile	My Dentist - Dr. North	No Referral	---

WHAT'S IMPORTANT

WHAT'S IMPORTANT

	1 Not	2 Somewhat	3 Important	4 Very	5 Extremely
Length of Tx					✓
Comfort		✓			
Latest Tech				✓	
Clear/Invisible		✓			
Low Monthly				✓	
Low Down Payment					✓
Quality of Tx					✓
Starting Tx Within a Month		✓			

ADDITIONAL DETAILS

ADDITIONAL DETAILS

No additional details

Cheat Sheet Sections (Cont.)

2. Insurance

Includes important insurance details, including:

- Carrier and plan priority information
- Coverage amounts
- Other relevant insurance notes

CARRIER DETAILS →

NOTES →

COVERAGE ESTIMATE →

Insurance			
^ PRESBYTERIAN HEALTH			
Carrier	Priority	COB	AOB
Presbyterian Health	Primary	Standard	Practice
Amount	Coinsurance	Age	Wait Period
\$1500.00	60%	99	12

▼ NOTES

Estimated Maximum Insurance Coverage: \$1500.00
This is an ESTIMATE. The calculated insurance coverage will be shown on the Slider when treatment is recommended.

3. Medical History

This section consolidates separate medical history sections into one organized section with subheaders:

- General Health Info: Includes dentist information and other general health details.
- Bisphosphonate History
- Ortho Treatment: Past orthodontic treatment information.
- Dental Hygiene
- Medical Conditions
- Allergies
- Habits

Important: Key info requiring staff attention is highlighted in **yellow** in this section.

GENERAL HEALTH INFO →

BISPHOSPHONATE HISTORY →

ORTHO TREATMENT →

DENTAL HYGIENE →

MEDICAL CONDITIONS →

ALLERGIES →

HABITS →

Medical History			
GENERAL HEALTH INFO			
Dentist	Last Appointment	General Health	Current Drugs
Dr. Stewie Bob	Longer than 24 months	Great	Multi-vitamins
BISPHOSPHONATE HISTORY			
Fosamax			
Yes			
ORTHO TREATMENT			
Previously evaluated for ortho	Informed about any missing or extra permanent teeth	Pain, tenderness, and/or clicking in the temporomandibular joint (TMJ)	Injury to the face, mouth, teeth, or chin
No	Yes	Yes	Yes
Problems with previous dental work	Adenoids or tonsils removed		
Yes	Yes		
DENTAL HYGIENE			
Water is Fluoridated	Floss Daily	Gums Bleed	Brush Teeth Daily
Yes	Yes	Yes	Yes
Taking Fluoridated Supplements	Comments		
Yes	I do my best!		
MEDICAL CONDITIONS			
Abnormal Bleeding Anemia Artificial Bones / Joints Asthma Cancer Chicken Pox Chronic Sinus Problems Congenital Heart Defect			
Convulsions / Epilepsy Diabetes Endocrine / Growth Disorders Handicaps / Disabilities Heart Murmur Hearing Impairment Hemophilia / Blood Disorders			
Additional Comments			
Additional comments on medical conditions!			
ALLERGIES			
Latex			
HABITS			
Clenching or Grinding Teeth Lip Sucking / Biting Thumb / Finger Sucking Mouth Breathing Nail Biting			

Cheat Sheet Sections (Cont.)

4. Notes and Exam Results

Includes doctor notes and exam results.

- **Before the appointment is recorded:** An Enter Exam Result dropdown displays, allowing you to select or edit the exam result.
- **After the appointment is recorded:** The Cheat Sheet displays the exam outcome along with the associated notes and results.

The screenshot shows a web interface titled "Notes and Exam Results". It is divided into two main sections: "DOCTOR NOTES" and "EXAM RESULTS".

- DOCTOR NOTES:** This section contains the text "No notes available". To the right of this text is a large, light gray rectangular box labeled "Add a Note". A green arrow labeled "ADD A NOTE" points to this box. Below the "Add a Note" box is a checkbox labeled "Is Admin Only?". A blue button labeled "SAVE NOTE" is located at the bottom right of this section.
- EXAM RESULTS:** This section features a dropdown menu with the text "Enter Exam Result". A green arrow labeled "SELECT / EDIT EXAM RESULT" points to this dropdown.

At the bottom left of the interface is a blue link labeled "← BACK".

Annotations on the left side of the image include:

- A green arrow labeled "DOCTOR NOTES" pointing to the "DOCTOR NOTES" section header.
- A green arrow labeled "SELECT / EDIT EXAM RESULT" pointing to the "EXAM RESULTS" dropdown menu.

Cheat Sheet Visual Guide

PATIENT AND FAMILY INFORMATION

← BACK

Sara Bodie

EXPAND ALLCOLLAPSE ALL

^ Patient and Family Information

PERSONAL INFO

Name	Sara Bodie	Date of Birth	09/09/1990	Age	35	Sex Assigned at Birth	Female
------	------------	---------------	------------	-----	----	-----------------------	--------

RESPONSIBLE PARTY

Name	Sara Bodie	Relationship to PT	Self	Marital Status	—	Sex	Female
Occupation	Lead Operation Technician	Employer	Strike Inc	Credit Test	No credit check		

HELP US GET TO KNOW THE PATIENT

Reason for Treatment	I'd like a perfect smile	Primary Referral	My Dentist - Dr. North	Secondary Referral	No Referral	Insurance	—
----------------------	--------------------------	------------------	------------------------	--------------------	-------------	-----------	---

WHAT'S IMPORTANT

	1 Not	2 Somewhat	3 Important	4 Very	5 Extremely
Length of Tx					☒
Comfort		☒			
Latest Tech				☒	
Clear/Invisible		☒			
Low Monthly				☒	
Low Down Payment					☒
Quality of Tx					☒
Starting Tx Within a Month		☒			

ADDITIONAL DETAILS

No additional details

^ Insurance

^ PRESBYTERIAN HEALTH

Carrier	Presbyterian Health	Priority	Primary	COB	Standard	A/B	Practice
Amount	\$1500.00	Coverage	60%	Age	99	Wait Period	12

NOTES

Estimated Maximum Insurance Coverage: \$1500.00

This is an ESTIMATE. The calculated insurance coverage will be shown on the Slider when treatment is recommended.

^ Medical History

GENERAL HEALTH INFO

Doctor	Dr. Stewie Rob	Last Appointment	Longer than 24 months	General Health	Great	Current Drugs	Multi vitamins
--------	----------------	------------------	-----------------------	----------------	-------	---------------	----------------

ORTHODONTIC HISTORY

Prosmox

Yes

ORTHIC TREATMENT

Previously evaluated for ortho	No	Informed about any missing or extra permanent teeth	Yes	Pain, tenderness, and/or clicking in the temporomandibular joint (TMJ)	Yes	Injury to the face, mouth, teeth, or chin	Yes
Problems with previous dental work	Yes	Adhesives or bonds removed	Yes				

DENTAL HYGIENE

Water is Fluoridated	Yes	Floss Daily	Yes	Brush Teeth	Yes	Brush Teeth Daily	Yes
Taking Fluorinated Supplements	Yes	Comments	I do my best!				

MEDICAL CONDITIONS

Abnormal BleedingAnemiaArtificial Bones / JointsAsthmaCancerChicken PoxChronic Sinus ProblemsCongenital Heart DefectConvulsions / EpilepsyDiabetesEndocrine / Growth DisordersHandicap / DisabilitiesHeart MurmurHearing ImpairmentHemophilia / Blood Disorders

Additional comments:
Additional comments on medical conditions!

ALLERGIES

Latex

HABITS

Clenching or Grinding TeethLip Sucking / BitingThumb / Finger SuckingMouth BreathingNail Biting

^ Notes and Exam Results

DOCTOR NOTES

No notes available

Add a Note

☐ Is Admin Only?

SAVE NOTES

EXAM RESULTS

Enter Exam Result

INSURANCE

MEDICAL HISTORY

NOTES AND EXAM RESULTS