

How to Add a New Patient and Set Up Case Details.

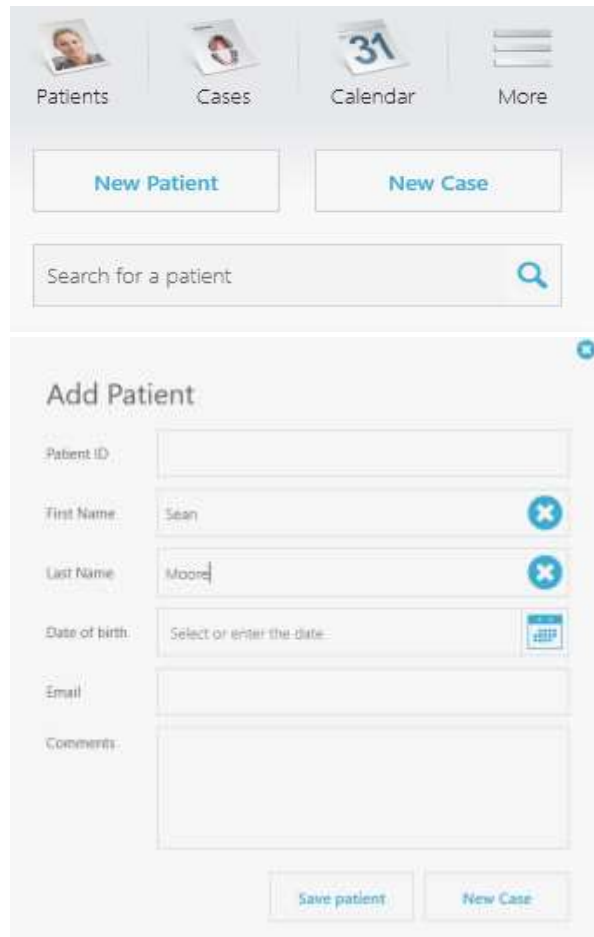
Every new patient and new case must be entered into TRIOS.
To do this you must follow these simple steps:

Step 1. Click the **New Patient** icon.

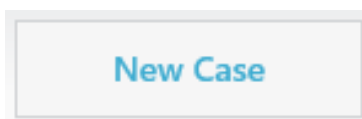
Step 2. Fill in patient ID, first name, last name (which is mandatory), date of birth and any notes if necessary.

Note: Leaving out details may save you time in the short run, however, more details make it easier to search for the patient and cases later on.

Step 3. Click **New Case** when you are finished.



The screenshot shows the TRIOS software interface. At the top, there are four icons: 'Patients' (a person's headshot), 'Cases' (a person's headshot), 'Calendar' (a calendar icon with the number 31), and 'More' (a hamburger menu icon). Below these icons are two buttons: 'New Patient' and 'New Case'. Below the buttons is a search bar with the placeholder text 'Search for a patient' and a magnifying glass icon. Below the search bar is the 'Add Patient' form. The form has the following fields: 'Patient ID' (a text input field), 'First Name' (a text input field with the value 'Sean' and a blue 'X' icon to the right), 'Last Name' (a text input field with the value 'Moore' and a blue 'X' icon to the right), 'Date of birth' (a dropdown menu with the text 'Select or enter the date' and a calendar icon to the right), 'Email' (a text input field), and 'Comments' (a large text area). At the bottom of the form are two buttons: 'Save patient' and 'New Case'.



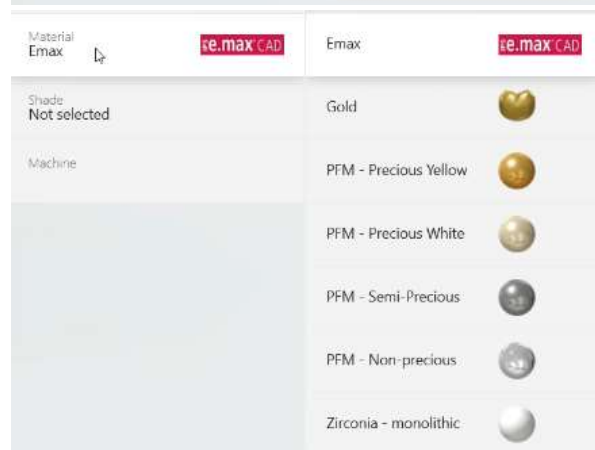
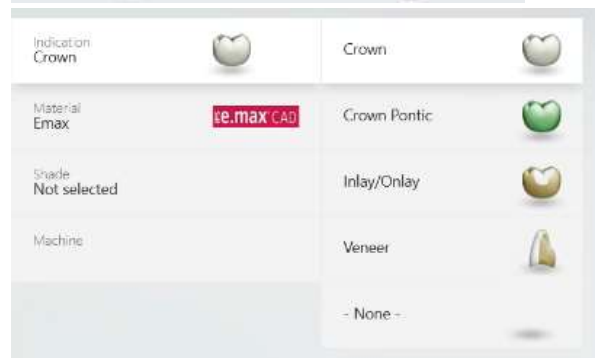
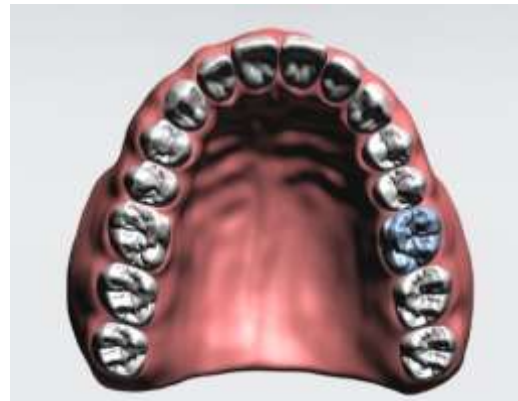
The screenshot shows a single button labeled 'New Case' in blue text on a light gray background.

Step 4. You will be taken to the **Send to** page where you can select where the case will be sent.

Step 5. Select the tooth you wish to prepare by holding the cursor over the desired tooth and left click.

Step 6. Now select **Anatomy** and choose an indication from the drop down list. In this case, we performing the workflow for a single molar crown, so select crown from the list of indications.

Step 7. Next select **Material** and choose from the drop down menu.



Step 8. Next select **Shade** and choose from the drop down menu. This selection can be changed later after taking shade measurement.

Step 9. On the right-hand side of the screen you can view and edit the case details.

You must add a desired delivery date. During **In-house** production this option is unnecessary.


At this stage you can add comments, attachments and additional scans, for example your clinical photos. Additionally, you can add a video or a photo to the workflow.


Step 10. Click **Next** to move on to the scanning stage.

Shade Not selected	Not selected
Machine	A1
	A2
	A3
	A3.5
	A4
	B1

Patient information


Sean Moore






Send to

Smith Dental Practice




Delivery date


Select date




Comments and attachments




Additional scans




Pre-Preparation



Intra oral camera





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