



topsChecklist



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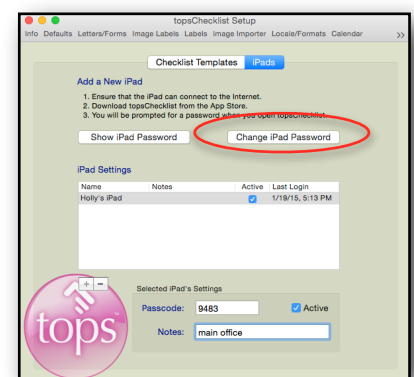
The topsChecklist for iPad app allows you to create customized checklists and to use the iPad as a touch screen. The app also writes back to topsOrtho and a copy of the checklist will be stored in the patient's record.

To use the app, you must have the following:

1. Newest model possible. Please contact [tops Support](#) for the most recent list of compatible iPad models.
2. A WiFi network in your office
3. topsOrtho version 6.2 or later
4. A current support contract
5. Your Apple ID & password
6. You may need the Admin password for the workstation you will use to pair your iPad and your topsServer. This is the computer's password not your tops password and the support team does not know this password.

How to set up the app

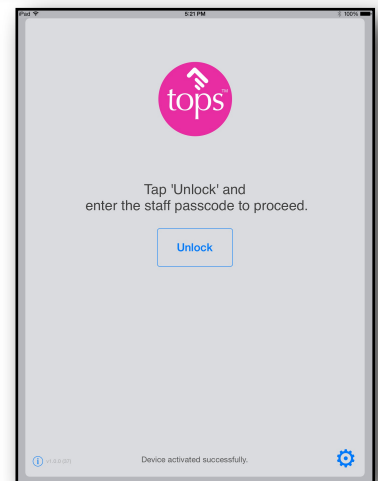
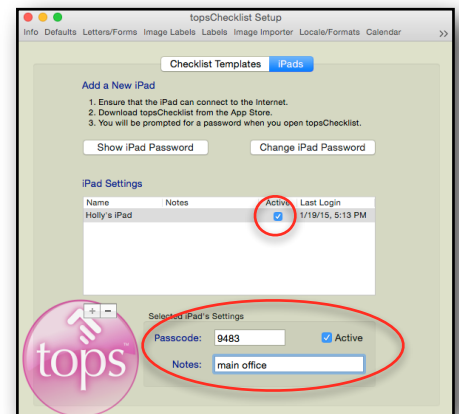
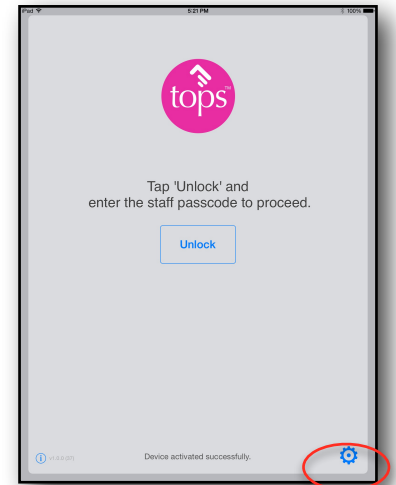
1. Verify WiFi connectivity.
 - On your iPad, open the Settings app and tap **WiFi**.
 - Connect the iPad to the same wireless network as the topsOrtho workstation you will use for pairing.
 - Close the Settings app and check the WiFi symbol on the top of your device to ensure you're connected.
2. Download the app.
 - From your iPad, open the **App Store**.
 - Search for **topsChecklist** (all one word) or **Cogent Design**.
 - Select the **app** and tap **Install**.
 - Enter your **Apple ID & Password**.
3. Access the app password from **Practice Setup...**
 - From the topsOrtho menu in the menu bar, select **Practice Setup...**
 - At the far right, select the **topsChecklist** panel.
 - At the top right of the panel, click the **iPads** tab.
 - The first time you access the app, click the **Change iPad Password** button. For verification purposes you will be required to enter your topsOrtho Password.
 - The app password will be displayed. If later on, you need to be reminded of the password, click the **Show iPad Password** button.



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4. Pair the iPad to your topsServer

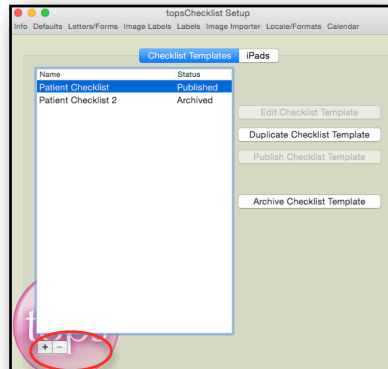
- On the iPad, tap the gearwheel in the lower right corner.
- If you are in the same physical location and local network as the topsServer, the topsServer should be displayed on the iPad. Simply tap to select your **topsServer**.
- Enter the **topsChecklist Password** (shown on your topsOrtho workstation) and tap **Save** at the upper right of the screen.
- If you are not in the same location as the topsServer, or your location is not display, enter the topsServer's **internet IP address** in the Enter IP Address Manually field. Note: This is the same IP address used by topsOrtho in the login window when you connect from outside the main office. If you need the IP address, go to the website: www.ipchicken.com from within the office. Contact our support team +1 (770) 627-2527 or support@topsortho.com.
- Enter the **topsChecklist Password** and tap **Save** at the upper right of the screen.
- The app will connect to your topsServer and the status will be shown at the bottom of the iPad screen.
- On your topsOrtho workstation, look at the topsChecklist panel. In the iPad Settings list, the **name** of your iPad will be displayed.
- From the list, check the **Active** checkbox.
- In the Selected iPad's Settings field, a randomly generated 4 digit passcode will be displayed. This is the code used to unlock the app. If you would like to customize the passcode, enter a new passcode and tab or click out of the passcode field. If you would like to enter a note, like 'Main Office,' enter it in the Notes field.
- Navigate back to the app, press the **Unlock** button and enter the **4 digit Passcode**.
- If connection fails, tap the gear wheel again, reenter the password, check the WiFi connection and if you manually entered the IP Address, reenter it. Need additional help? Contact our support team +1 (770) 627-2527 or support@topsortho.com.



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How to Create a Checklist

1. From Practice Setup, select **topsChecklists**.



2. Click the **+** (*plus*) button.
3. Now start building the checklist. Enter the **name** of the checklist, the **name** of the section (if you want the questions divided into sections), and click the **New Question** button to add a question.

4. Select the **Type** of question. The types are as follows:

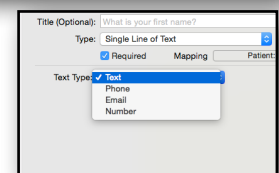
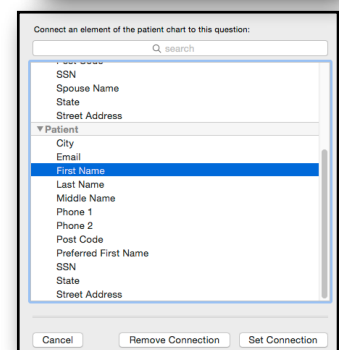
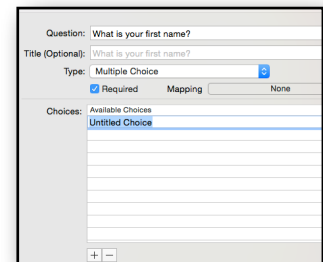
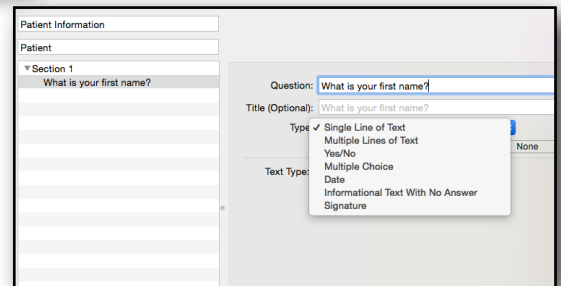
- **Single Line of Text**, is used if the question can be answered in one line.
- **Multiple Lines of Text**, is used if the question requires more than a one line answer.
- **Yes/No**, is used if you want a yay or nay response.
- **Multiple Choice**, is used if you want to provide choices. Click the **+** (*plus*) button to add the multiple choices.
- **Date**, if the answer requires a date entry.
- **Informational Text With No Answer**, is used if you want clients to read office policies, HIPAA statements, or other informational text. Copy and paste the information into the **Content** field and clients will be prompted to Accept on the iPad.
- **Signature**, is used for signing directly on the iPad.

5. If you want the question mapped from topsOrtho and auto-filled on the iPad, click the **Mapping** button, select the **element** from the patient chart and click the **Set Connection** button.

6. If the question is required, check the **Required** checkbox.

7. Choose the **Text Type** for the question:

- **Text**
- **Phone**
- **Email**
- **Number**



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8. Repeat this process until all questions have been added.
9. When you are done, press the **Save Checklist** button.

The screenshot shows the 'topsChecklist Setup' dialog box. On the left, there is a tree view with 'Patient Info' and 'HIPAA' sections. The 'HIPAA' section is expanded, showing 'Please read' and 'Sign here' items. The main area on the right has fields for 'Question', 'Title (Optional)', 'Type', and 'Content'. The 'Type' dropdown is set to 'Informational Text With No Answer', and the 'Required' checkbox is checked. At the bottom right, the 'Save Checklist' button is circled in red.

10. Your checklist will be in draft mode until it's published. To publish the checklist, press the **Publish Checklist Template** button. Please note, once a checklist is published it can only be duplicated or archived.

The screenshot shows the 'topsChecklist Setup' dialog box with the 'Checklist Templates' tab selected. A table lists the templates:

Name	Status
Patient Information	Draft

Below the table, there are buttons for 'Edit Checklist Template', 'Duplicate Checklist Template', 'Publish Checklist Template' (circled in red), and 'Archive Checklist Template'. The 'Publish Checklist Template' button is highlighted with a red oval.

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How to make a checklist available for a patient

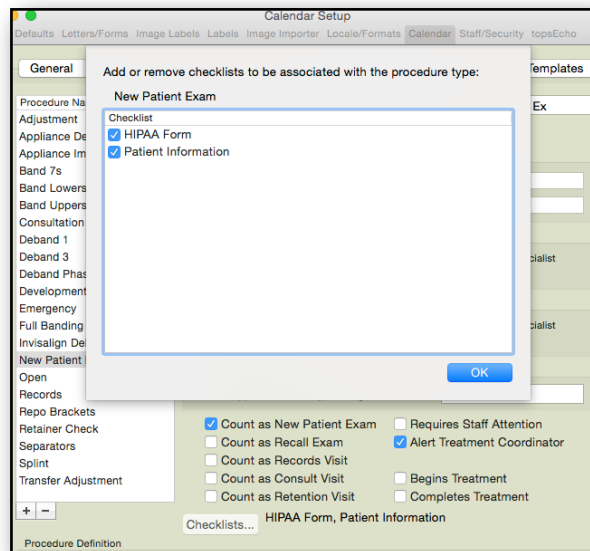
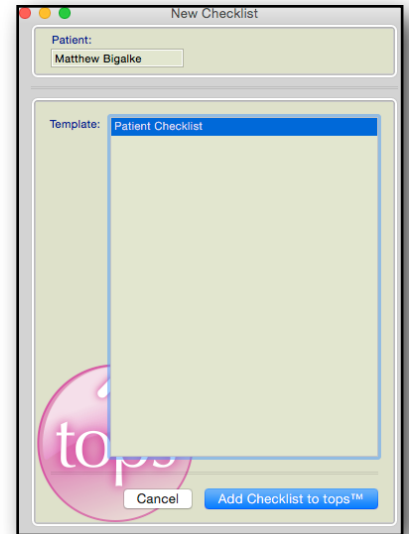
There are two ways to add a checklist for a patient.

The one-checklist-at-a-time method is described here:

1. From the topsOrtho menu bar, select **Action, New Checklist...**
2. Enter the **patient's name**.
3. Select the **patient** and press **tab**.
4. From the list of available checklists, select the **checklist(s)**.
5. Click the **Add Checklist to tops** button.

You can also associate checklists with procedures so checklists will be available automatically. Here's how:

1. From Practice Setup..., select **Calendar**.
2. Select **Clinical Procedures**.
3. From the list of Procedures, select the **Procedure** you would like certain checklists to be associated with.
4. Click the **Checklists** button, and select the **checklists** from the list.
5. Click **OK**.



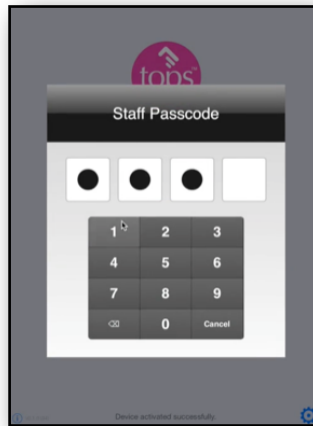
6. The selected checklists will be available on the iPad app when the patient checks in for their appointment. Checklists are visible to the staff in the following areas: Patient Flow, Patient Chart (Checklists tab), Matrix > Checklists.

4	Marc Hansen	Late			MB	
5	Erik Burke	Waiting	2		MB	
1	Thomas Gallaher	Waiting	1		EM	HW
2	Eva Dirkes	Waiting	2		EM	HW
3	David Geller-Stephens	Done			EM	

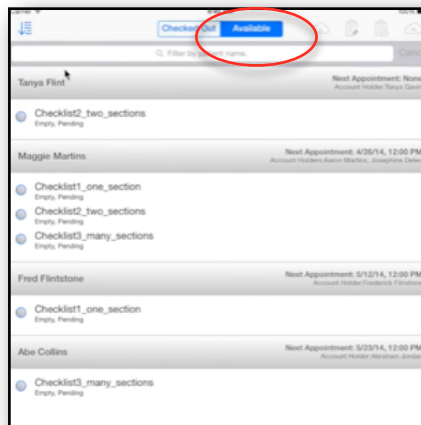
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How to use the app

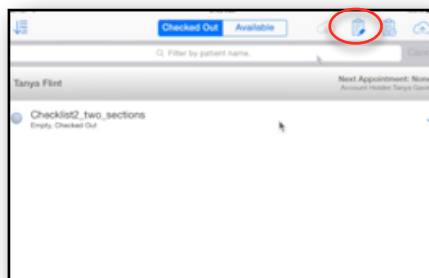
1. From the app, tap **Unlock** and enter the **4 digit passcode**.



2. Tap the **Available** button.

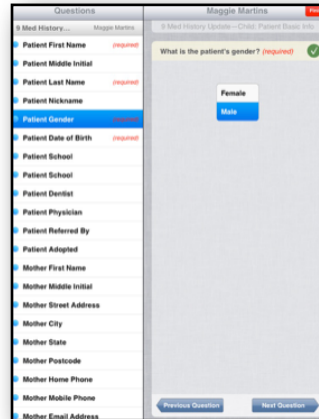


3. The staff member will select the **Checklists** they want the patient to fill out, and tap the **Check Out** button (cloud with down arrow icon).
4. Next, the staff member will tap the **Fill** button (checklist with pen icon)

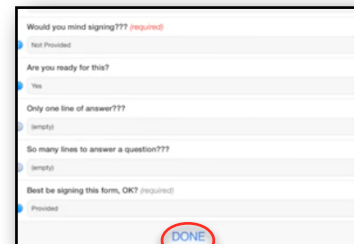
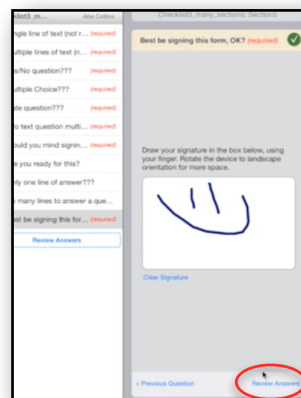


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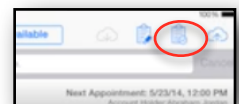
5. And hand the **iPad** to the patient.



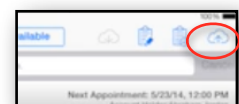
6. The app is very intuitive. It will move from question to question when the patient clicks on the next question button or by swiping left. The patient/account holder will fill out the form and sign electronically when finished. The patient will tap the **Review Answers** button. This will give them the opportunity to review answers and make changes. The patient will click **Done** when finished.



7. When the patient returns the checklist to the staff member, the staff member will tap **Finish** and enter the **4 digit passcode**.
8. The staff member will select the **checklists** for review and tap the **Review** button (checklist with checkmark) and review the responses. If there are changes to answers that were mapped from topsOrtho, or if is the first time the patient has answered a particular question, the answer will have a light magenta background color. If edits are necessary, the staff can tap the **Edit** or **Revert** button.

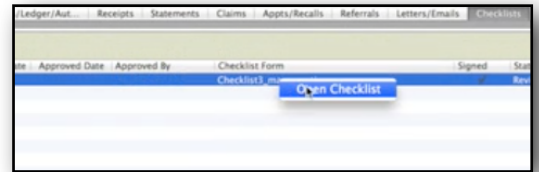


9. When everything is ready to be checked into topsOrtho, the staff member will tap the **Back** button, and tap the **Check In** button (cloud with up arrow).



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10. The final step to check the information back into topsOrtho is for the staff to navigate to the patient's Admin window (Checklist tab) or the Checklist Matrix (Matrix menu, Checklists), verify info, and approve the checklist. From topsOrtho, select the **checklist** and click **Open Checklist**.

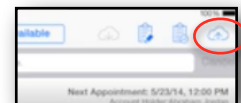
A screenshot of a checklist form titled 'Abe Collins'. The form is divided into sections: Section1, Section2, Section3, and Section4. Each section contains several questions with corresponding response fields and checkboxes. At the bottom right of the form, there is a button labeled 'Approve Checklist...' which is circled in red.

11. All the questions and answers are visible. When the staff member is ready to approve the checklist, they will click the **Approve Checklist** button. A password is required, so make sure the appropriate privileges are assigned. **Please note, the answers in topsChecklist will override what is in topsOrtho once the checklist is marked approved. Checklists can be unlocked and edited the same day they were completed.**

End of day

If you have checklists that are checked out (shown when you tap Checked Out on the app), but were never completed, check them back in. Here's how:

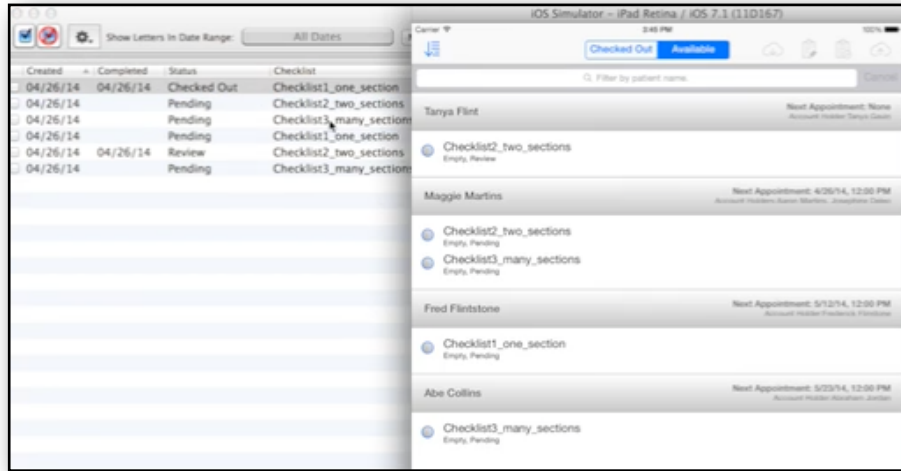
1. In the app, tap **Checked In**.
2. Tap a **checklist**.
3. Tap the **Check In button** (cloud with up arrow).



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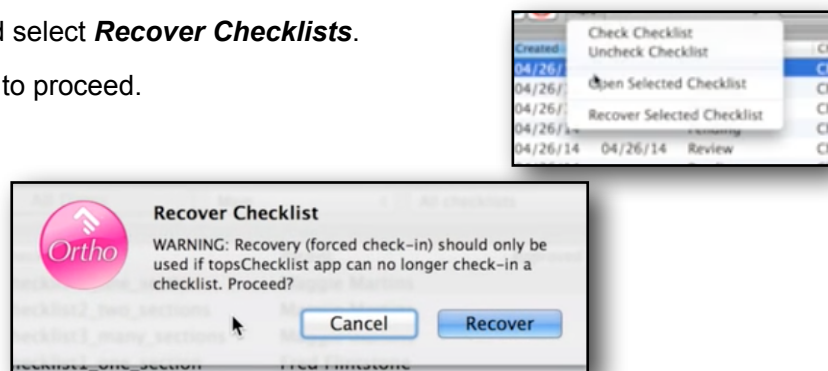
Checklist Matrix

1. From the Matrix menu, select **Checklists** and the **date range**. All of your checklists and statuses will be visible.
2. To approve a group of checklists, click and drag on the **checklists**, or click each **checklist** checkbox individually. You can also check or uncheck all checklists by clicking the **checkbox** button or the **gear wheel** and choosing **Check or Uncheck**.
3. View each checklist for accuracy and if the information is correct, click the **Approve Checklist** button.



Checklist Recovery

1. If the topsChecklist app is deleted, the checked out checklists will no longer be available on the iPad. You will need to recover the checklists. From the Checklists Matrix, select the **checklists** that are marked as checked out but do not appear on the iPad.
2. Click the **gear wheel**, and select **Recover Checklists**.
3. Click the **Recover** button to proceed.



4. Enter your **password** and the recovered checklist will be visible in the Available view on the iPad.
5. That's it! Now go make some checklists.



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- topsCephMate™ is an easy-to-use, intuitive digital cephalometric tracing and treatment program.
- topsEcho™ for the iPhone or iPad provides up-to-the-minute access to patient information and images, schedules, referrals, treatment notes and more.
- topsCheck-In for iPad™ is a fast, easy, reliable way for patients to check in using an iPad

For more information, visit our Web site: www.topsOrtho.com.

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