



INSTRUCTIONS: Creating A Template

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

WHAT IS A TEMPLATE:

- **Templates** are pre-saved Rx forms designed to streamline your workflow, ensuring efficiency and reducing the risk of submission errors. In most cases, especially when created by the DynaFlex® Design Team, these templates are built from your *Master Prescriptions*, which are securely stored in our database. By using **Templates**, you eliminate redundant data entry and ensure consistency across prescriptions. Simply select a template, input the patient's information, make any necessary customizations for the appliance, and submit your case with confidence. Design drawings are saved within templates, whether completed by you, your staff, or the DynaFlex® Design Team, further enhancing accuracy and efficiency in the submission process. For more details on **Templates** and how to resolve them, refer to the **Creating A Template** or **Submitting From A Template Tutorial**.

HOW TO CREATE OR MANAGE A TEMPLATE

- Navigate to the **Create/Manage Templates** section on the left side of the page.
- Here, you will see different prescription sections. Any saved templates will be displayed under their respective categories.
- To create a new template, select **Create New Template** at the top right corner of the page.
- Choose the relevant Rx form from the drop down for the template and click **Create Template**.
- Fill out the prescription details as you would like saved for a specific appliance. There is no need to enter a patient name or requested date, as these will vary for each case and will not be saved in the template.
- Once the Rx is complete, click "Save As New Template" at the top or bottom of the form.
- You will be prompted to name the template before saving. *Tip: Use detailed and descriptive names to easily identify templates as you create more.*

FAQs

Where do I find my templates? All saved templates are located in the **Create/Manage Templates** section on the left side of your screen. You can edit, delete, or update your templates from here at any time.

Can I save a template from a case I'm working on? Yes. You can create and save a template from any prescription you are filling out. On all Rx forms, there is a **Save As New Template** option at the top and bottom of the page. Before submitting, click this option, enter a template name, and save it. The Rx choices, work order comments, and drawing will be preserved. *Note: Patient information does not save in templates since it changes with each case.*

How do I submit an Rx for an appliance that includes both a fixed and removable component? If your case involves both a fixed and removable appliance (e.g., upper RPE and lower Schwarz), the General Ortho prescription is the best choice.