ddsally *The dentist's referral ally.*

Getting Started with DDSALLY

A step-by-step guide for dental offices: creating your account, setting up your team, connecting with other practices, sending referrals with imaging, and messaging securely.

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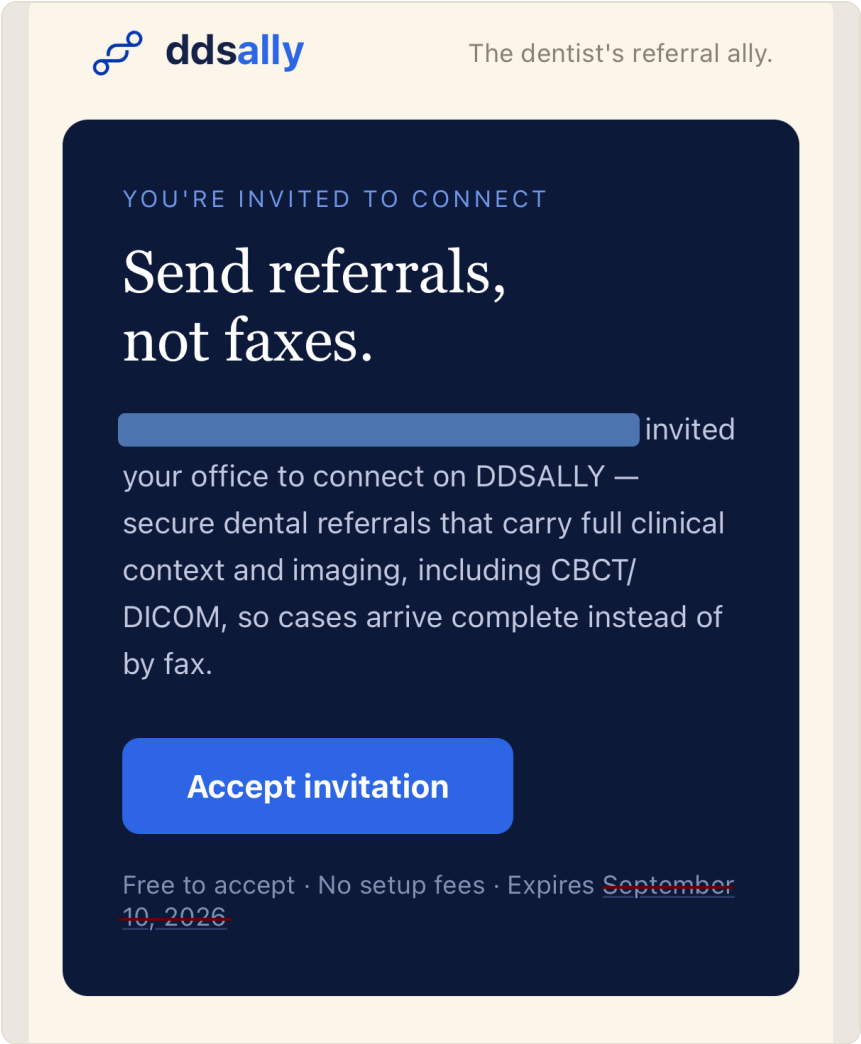
1. Creating your practice account

There are two ways to join DDSALLY: accept an invitation from a practice that already uses it, or sign up directly.

1A. SIGNING UP FROM AN INVITATION (RECOMMENDED)

If a colleague's office invited you, you will receive an email from DDSALLY with an invitation link.

1. Open the invitation email and click **Accept invitation**. The link opens the DDSALLY signup page with your inviting practice already recognized.



The invitation email showing the Accept invitation button.

2. Complete the signup form: your practice name, practice type (general practice or specialty), your practice NPI, and the administrator's name, email, and password.
3. Click **Create account**. Because you arrived through an invitation, your practice is automatically connected to the inviting office — you can receive referrals from them immediately.
4. **It is important to have at least one team member with a provider status (usually a dentist or RDH).** You may do that by editing the office info and adding a provider status in addition to the Admin, or by inviting a practitioner working in the office to join the office team as a Provider.

1B. SIGNING UP DIRECTLY

1. Go to ddsally.com and click **Get Started** on the upper right corner of the page.
2. Fill in the same practice details — practice name, type, NPI, and administrator account information — and create your account.

> After signing in, connect with the offices you work with (Section 3) — referrals can only be exchanged between connected practices.

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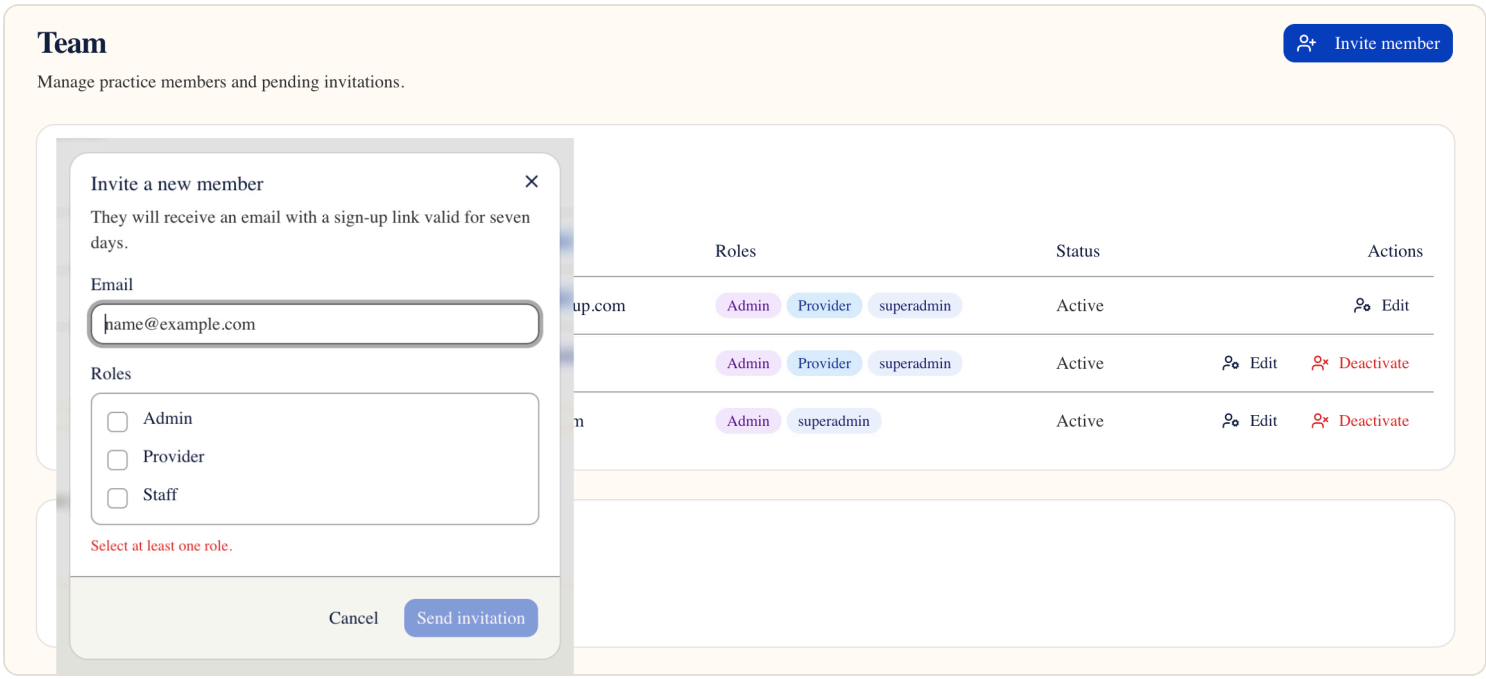
2. Adding office members and managing roles

Each person in your office gets their own login under the practice account. There are three roles, and a member can hold more than one:

Admin	manages the practice: team members, connections, and settings.
Provider	a doctor; appears as a referring or receiving provider on referrals.
Staff	front desk and clinical support; can prepare and manage referrals and messages.

2A. INVITING A NEW OFFICE MEMBER

1. Go to **Team** in the left menu.
2. Click **Invite member**, enter their email, and check the role or roles they should have.



The invite-member dialog with the role checkboxes.

3. They receive an email invitation; accepting it creates their personal login under your practice.

2B. CHANGING OR ADDING A MEMBER'S ROLE

1. On the Team page, find the member and click **Edit**.
2. Check or uncheck roles as needed — for example, adding Provider to a doctor who was set up as Staff — and save. The change takes effect immediately.

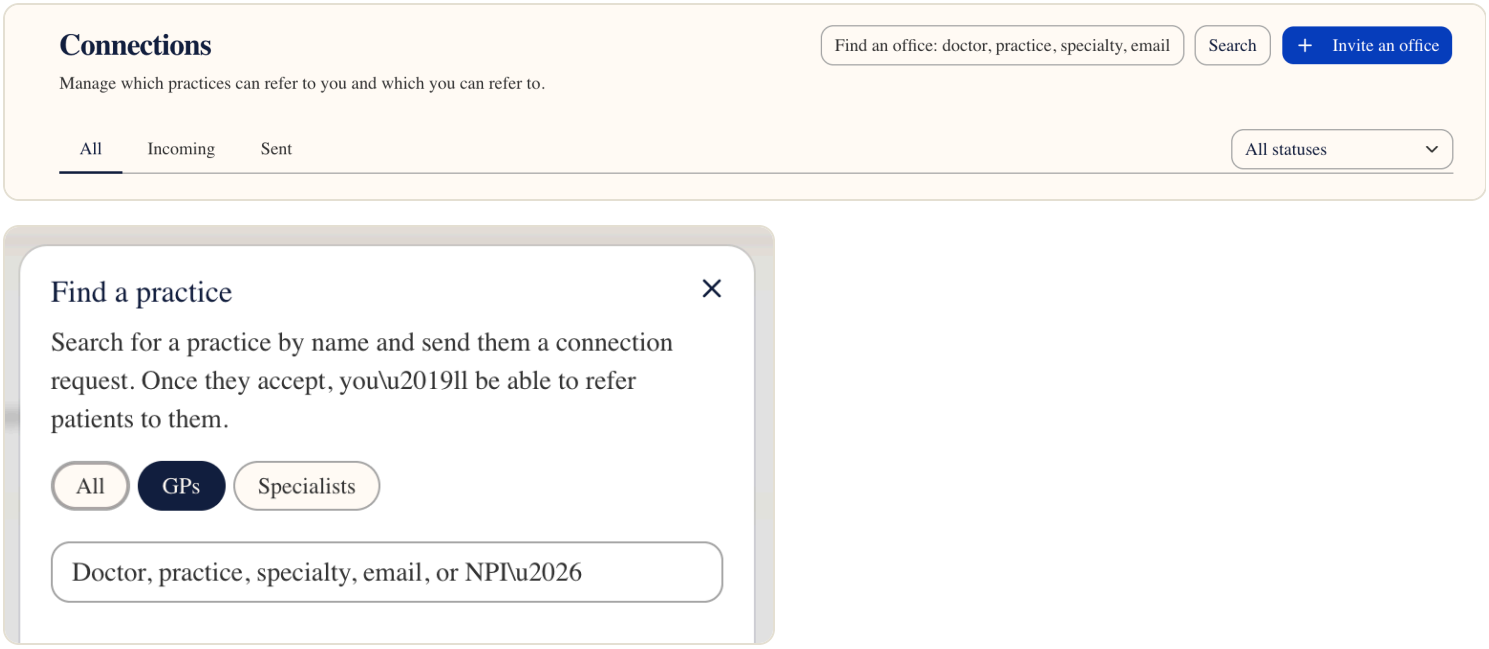
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3. Finding a specialist — or inviting one

Referrals flow between connected practices. Connecting is a one-time step per office.

3A. IF THE OFFICE IS ALREADY ON DDSALLY

1. Go to **Connections** and click **Find practice**.

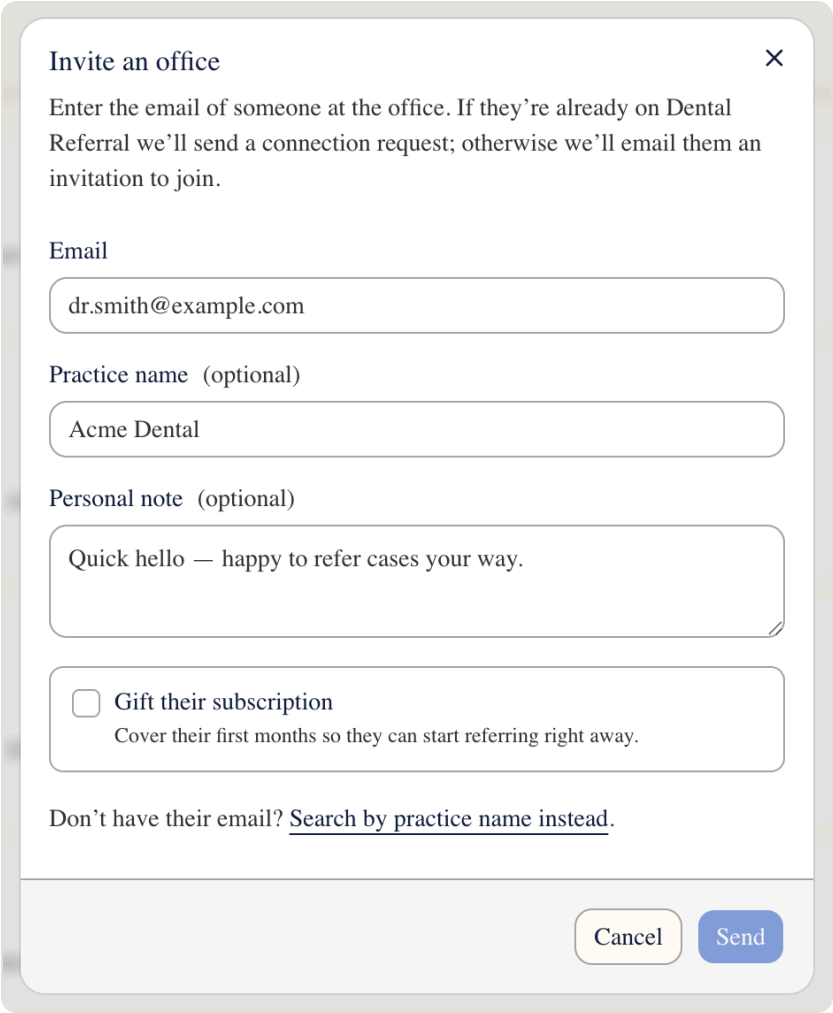


The Connections page, and the Find a practice dialog it opens.

2. Search by doctor’s name, practice name, specialty, office email, or NPI number, then send a connection request. Once the other office accepts, you can refer to each other.

3B. IF THE OFFICE IS NOT ON DDSALLY YET

1. On the Connections page, click **Invite office** and enter the office’s email address.



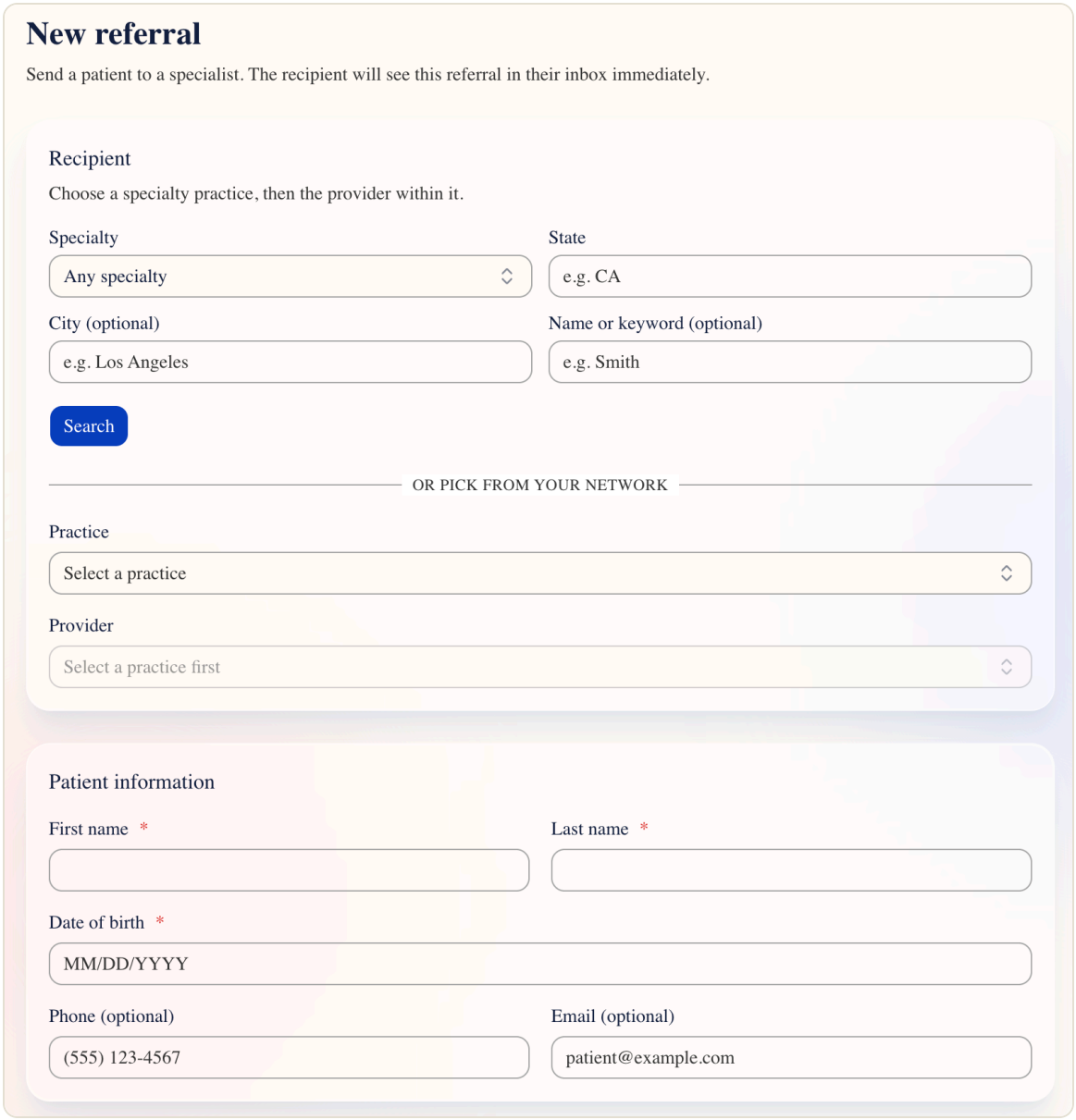
The invite-office dialog.

2. They receive an invitation; when they sign up through it, the connection to your practice is created automatically (Section 1a).

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4. Sending a referral

1. Go to **Referrals** and click **New referral**.
2. Choose the receiving practice from your connections, and the provider if known.
3. Enter the patient's details. ***If you include the patient's email address, DDSALLY automatically sends the patient a courtesy email when the referral goes out and another when the specialist accepts it — so the patient knows what is happening without a phone call.***



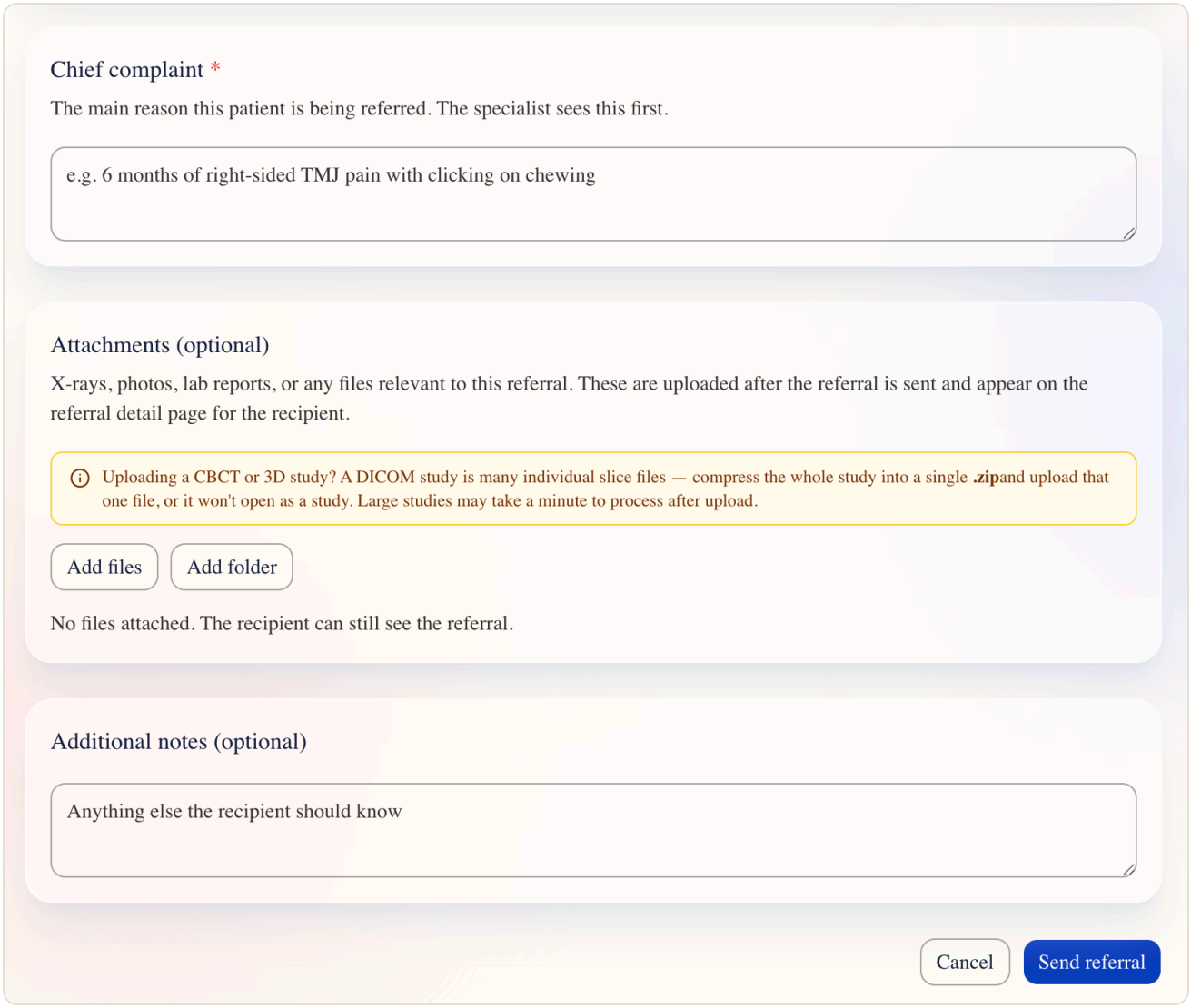
The new-referral form: recipient, patient details, reason.

4. Describe the reason for referral. Specialty-specific fields appear based on the type of referral.

4A. ATTACHING IMAGES — INCLUDING CBCT

1. In the attachments section, click **Add files** for individual files — radiographs, photos, PDFs — or **Add folder** to attach an entire CBCT export straight from your scanner.

> A CBCT study is often hundreds of DICOM files in one folder — attach the whole folder and DDSALLY handles it, automatically skipping system junk files. The receiving office views the study in the browser; no CD, no separate viewer install. **We recommend compressing all the DICOM files of one study in a single zip file before submission.**



The referral form's attachments section, ready for files or a whole CBCT folder.

2. Click **Send referral**. Files upload and the receiving office is notified immediately. A referral can also be sent with no attachments at all — images can be added to it later.

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5. Chatting with offices in your network

Chatting can be done two ways:

A. THROUGH THE REFERRAL PAGE

1. Go to **Referrals**.
2. Open the referral you want to chat about.
3. Find the **Chat** box.
4. Type your message.
5. Click **Send**.

B. USING THE CHAT TAB ON THE LEFT MENU

1. Go to **Chat** and click **New**.
2. Choose a connected office and type your message — a question about a case, scheduling, or a heads-up that a referral is coming.
3. Conversations are secure, stay inside DDSALLY, and are shared at the practice level — so the front desk and the doctor both see the thread, and nothing sits in personal email.

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6. Using the Messages tool

This is a one-way secure message to contact patients and send them documents and records using a HIPAA-compliant secure messaging system.

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7. System requirements

DDSALLY runs entirely in your web browser — there is nothing to install. For referral management and messaging, any current browser on any device works. Viewing 3D imaging studies (CBCT volumes) is more demanding:

- **Browser:** Google Chrome (recommended) or Microsoft Edge, latest version. Safari 16.4 or newer and current Firefox also work. Hardware / graphics acceleration must be left on (it is on by default).
- **Computer:** a 64-bit desktop or laptop with at least 8 GB of RAM — 16 GB recommended for large CBCT volumes and 3D rendering. A dedicated graphics card is not required, but recent hardware renders noticeably faster.
- **Screen:** 1920×1080 or larger is recommended for the four-pane imaging layout.
- **Connection:** a standard broadband connection. Imaging studies are streamed once and then viewed locally, so day-to-day use is light.
- **Mobile:** referrals, chat and messages work on phones and tablets; full 3D volume viewing is designed for desktop.

Questions?

Reply to your invitation email or contact **support@ddsally.com**. Setting up a new office takes about five minutes end to end — and the first referral usually takes less than that.

SUPPORT@DDSALLY.COM