

DentPal Patient UNLINK / RELINK Protocol

Purpose:

UNLINK must **fully prevent automated/mass outreach and module access** while still allowing **Notify manual communication** and a **patient-approved** way to restore access—**without PHI** and without accidental reactivation.

1) UNLINK Protocol (Clinic Relationship = OFF)

Trigger: Patient is **Unlinked in DentPal** for a clinic **OR** patient is **Inactivated in the PMS** for that clinic.

DentPal Action: Set patient as **UNLINKED/Inactive for that clinic** (do not delete).

Results (must all happen):

1. **Notify Access:** Patient remains available in **NOTIFY manual-only** (1:1 SMS/Email).
2. **No Automation:** **All automated messaging OFF** for that clinic (no reminders/recalls/sequences/triggers).
3. **No Mass Messaging:** Patient is excluded from **Bulk, Broadcast**, and all **Mass Communications** (including **MyPal Performance**).
4. **Module Lock:** Clinic **cannot access CONNECT** (and any non-Notify modules) for this patient while UNLINKED.
5. **History Visible:** Full **Notify chat history remains visible**.
6. **Not Opt-Out:** UNLINK/Inactive is **not the same as OPT-OUT** (channel opt-out rules still apply separately).

2) RELINK Protocol (Patient Approval Required)

Who initiates: Dental office (via **DentPal Notify**)

How: Send SMS or Email containing a **Relink Link** (no PHI).

UI Rule:

- **RELINK** appears as a **3-dot action** for that patient **only when the patient is UNLINKED** for that clinic.
- **RELINK must not** appear for patients already **LINKED**.

Patient Flow:

1. Patient opens link and selects **Accept** or **Decline**.
2. **Accept:** Patient becomes **LINKED/Active** for that clinic → clinic regains full access per normal rules.
3. **Decline:** Patient remains **UNLINKED/Inactive** for that clinic.

Security + Audit (required):

- Link must be **single-use** and **expire after 15 minutes**.
- Both the **sent relink request** and the **patient response (Accept/Decline)** must be logged in the **Communication Log**.

3) Data Updates While UNLINKED (PMS Source of Truth)

- Any updates to **phone/email/etc.** must be made in the **PMS first, then synced to DentPal**.
- **DentPal does not** update demographics as part of the relink flow.

4) Scope Rule (Critical)

- **UNLINK is clinic-specific only**.
- Unlinking at **Clinic A** must **not** affect Clinic B, even under the same customer/DSO.

5) System Template Control (DentPal Only)

- Relink message verbiage + link must live in **SYSTEM TEMPLATES** and must **not** be editable/accessible by the dental office/customer.
- **Only DentPal** controls the wording.

GuardRail

- Do not complete **RELINK** (restore full access) unless the patient is **Active in PMS** (or otherwise confirmed current for that clinic).
- Patient in the PMS must be **active/current** at time of relink approval

Related Information

Deceased Patient –

- The protocol will be the same as an UNLINKED patient. We are doing this for two reasons: 1) Efficiency; 2) If Clinic Makes a Mistake the patient has a path to being RELINKED.
- Only Notify will be accessible by clinic for this patient.
- To RELINK patient the protocol will be the same.
- We need to give this patient a different designation in DentPal (Unlinked – Deceased)
- ?????*****Dev Team and DP Team need to agree on Terminology – To be discussed in meeting and finalized for alignment*****

UPDATE: DENTPAL TERMINOLOGY PER DEV AND DP TEAM MEETING:

- LINKED; UNLINKED; DECEASED - This will be Dentpal Terminology in DentPal System