Presentation Training

Entering a New Patient:

- Log in to the AccepTx Pro website; it is recommended to type the address into the search bar instead of saving the link as a favorite.
- Click on the Patient tab, then click the Add Patient link in the upper right hand corner, and immediately select which location (if applicable) the patient needs to be added under.
- If there is integration, you will have the ability to search for your patient; you will not have to click "add patient"
- Select the RP relationship; there is a "Same As" link to move the demographic data from patient to responsible or vice versa, if it is the same.
- Enter patient demographic information; easier to type in the birth date (slashes included) versus using the calendar.
  - Any field with an asterisk is required.
  - Once the zip code is filled in, the city/state will automatically populate.
  - Email is not required but recommended
- Two workflows:
  - Save: pre-prep
  - Save + Create: patient is in the office with you now
- Click "Save & Create" (if patient is there) or "Save" (if the patient is not there).
  - If pulling up the presentation the next day, go to the Presentations tab and then click on "Add Presentation," and search for the patient.
  - Clicking "Save & Create" goes directly to the Presentations tab.
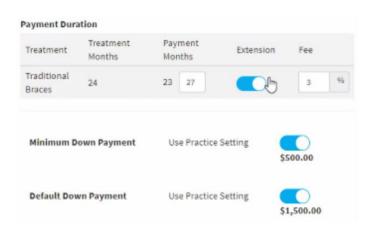 - Always search by the patient's last name.

Practice Staff - Setting up the Presentation:

- Use the Treatment and Payments tabs to set up the presentation; the tab in blue letters indicates the selected tab.
- Treatment:
  - Recommended not to use the Skip Treatment Details option.
  - Customize treatment times by typing in months if needed. The # of months that populate will be pulled from the default settings and will be used to determine how long your patient can finance out their treatment
- Add-ons can be required or optional.
  - The description of the Add-on will help answer the "why" for your patient and help encourage buy in for the particular service or treatment
  - Default pictures will appear; the office can change the pictures
    - If you opt out of assigning pictures to your presentation, your logo will appear for your patient
- Build treatment option(s) for your patient:
  - Select add-ons if desired and set as optional or required

Payments:

- Treatment options will be highlighted in blue when working on those financials.
- Select level of difficulty to determine the price level.
  - Level of Difficult: $1 – This is how your TC customizes and changes the treatment amount if the fee does not fit in the set price levels
- Additional charge field can add an amount without the patient seeing that extra amount added.
  - You will use this field with the $1 to create the custom treatment fee if needed
- Add estimated insurance when AOB = Practice
  - Do not add estimated insurance when AOB = Patient
- Select any practice discounts; more than one can be selected
  - A practice discount would have to be added to the presentation settings to be able to calculate a percentage discount at this time.
- Additional Discount title and dollar amount can be added
  - Only one Additional Discount can be added
- Pay in Full discount can be disabled if needed
- For the payment duration, the extension can be toggled on or off; type in the total number of months
  - Automatically jumps out four months
  - There is an optional field to enter an extension fee percentage.
- Minimum Down - toggle this on or off to require a minimum down payment if needed
- Click the next treatment -> It will be blue/selected
- Repeat previous steps.
- Click save or present.

Presenting Treatment Fees to a Patient:

- Click Present -> Treatment Overview -> Review Treatments -> Presentation (upper right) to go to the Smile Adjusters.

Patient-Facing Steps:
- Toggle the Treatment Options to review the details with the responsible party.
- The Smile Adjusters can be customized between the default settings & parameters determined by the office.
  - A specific amount can be typed into the box below the Smile Adjuster if needed; the sliders can be touchy.
- The Extra Savings discount can be toggled on/off to see the Pay in Full with cash or credit discounts.
  - If there is an extension finance fee, this will appear in red.
  - Click on other treatments at the top to customize each Smile Adjuster.
- The presentation, or "Investment Options," can be printed or shared via email to the responsible party.
- If there are multiple treatments, the office will need to print the Investment Options for each treatment.
- Click Share at the top; enter RP email; click the blue 'i' at the top of the screen to show the Patient PIN to access the presentation; responsible will enter first/last name of patient and the PIN. (It is important to note that the spelling must match what is in your AccepTx Pro system for the patient to gain access)
- Click Accept to move forward and review the contract.
  - The responsible party/office can click on Take Me to Smile Adjustors to go back and readjust if needed, then reaccept.
  - Once accepted, click the green button at the top to eSign each form.
  - Once the last form is signed, it goes back to AccepTx Pro and the signed forms can be viewed and printed, if desired.

General Office Info:
- Click actions to View, Edit, Decline, Delete, Re-Assign, Share (Last Shared), View Activity Log
  - Decline will mean the office will need to go to Actions/Edit and click Present to re-activate the presentation.
  - Re-Assign is to change the assigned TC
  - Activity Log will show every step taken in that presentation
  - Each user that has a login ID can add a profile picture if they want to; this helps customize the presentations.

Resetting a password
- From the main page to login, click "forgot" and then enter the user ID to send a password reset.

Presentation Status Meanings:
- <u>Draft –</u> TC has started to create the presentation, but it has not been presented
- <u>Presented –</u> TC has presented the presentation but patient has not accepted treatment
- <u>Hold -</u> TC has placed the presentation on hold (insurance waiting period, specialty appointment needed). The TC will need to remove the hold for a patient to be able to accept treatment.
- <u>Accepted –</u> Patient has accepted treatment but forms have not been completed
- <u>Signed –</u> Patient has accepted treatment and forms have been completed but down payment has not been collected
- <u>Expired –</u> Presentation has expired past the date allowed by the practice to honor the fees presented. The practice can delete the presentation if they know the patient is not moving forward with treatment or the practice can edit the presentation and re-present
- <u>Final –</u> Treatment has been accepted, forms are completed, down payment and monthly agreement has been completed – Patient is ready for their appointment!!
- <u>Declined –</u> patient has declined treatment, practice can note a reason for the declined treatment so they can go back and review at a later date if needed

AccepTx Pro
powered by OrthoBanc

Pushing to OrthoBanc for practices that have integration with AccepTx Pro:

- Click the green button "First appointment date & confirm the preferred first draft date."
- Set the two dates.
  - The first draft date calendar will only allow the 5th, 12th, 19th, or 26th to be selected.
  - There is a box that can be selected to send a reminder email to the responsible party before the first draft.
- Click "Continue to OrthoBanc for Payment Method"
  - You can tell the responsible party to log back in with the same pin number and click "Continue to OrthoBanc" to enter the payment method and sign the RPP; most offices will wait until the RP comes back in to complete that step
- Enter the payment method(s) and click save.
  - (i.e. Account #: 11111 Routing #: 064000017)

- The recurring payment plan form will open to eSign.
- Click "Agree to Recurring Payment"
- When finished, click "End" at the top to exit the presentation.