



## Customize Default Practice Settings for Presentations

### Updating Settings

- Under the Admin tab, select "Settings"

### Start on the Payment Details Tab

- Payment Defaults:
  - **Payment Months:** defaults to 80%
  - **Payment Extension Fee:** provide a value that is a percentage amount of the treatment total that the Billing Party is charged if they choose to go beyond treatment time for their payment plan. This will be the default value; however the TC or FC can manipulate this value per presentation.
  - **Default Down Payment:** provide a value that is a percentage of the treatment cost or a flat dollar amount that will be suggested as the default down payment amount when presenting to a responsible party
  - **Minimum Down Payment:** provide a value that is a percentage of the treatment cost or a flat dollar amount that will be suggested as the minimum down payment amount when presenting to a responsible party
  - **Late Fee Threshold:** Set a number of days in which a late fee would be applied if a payment is past this value date.
  - **Late Fee Charge (amount):** Set the amount of the late fee charged to patient, if their payment is past due
    - **NOTE** these fees are not charged by AccepTx or by OrthoBanc, rather these values are inserted into the forms that the responsible party signs when they agree to treatment.
- **Payment Due Date**
  - Select either at first appointment or "X" days after contract accepted
  - If you select the second option, be sure to fill in a value for # of days.

### Extra Savings & Discounts Tab

- Toggle on the Extra Savings master toggle to enable all settings for practice:
  - Toggle on the Payment In Full option to provide values for Credit Card or Cash/Check options
  - High Down Option
    - o Leave Toggle disabled and explain in training:
    - o This option allows the practice to give a discount if the Responsible Party opts for a higher down payment.

- o The practice can set a threshold of % of the treatment total and value for discount
- Bank Draft Option
- Leave Toggle disabled and explain in training:
  - o This option allows the practice to give a discount if the Responsible Party opts to make monthly payments from a bank account instead of a credit card.
- **Discounts (Apply to)**
  - o **Apply Practice Discounts**
    - Make a selection that makes most sense to the practice from the options provided. These discounts need to have set amounts or percentages, they can not be adjusted on a patient by patient basis. You are able to apply multiple practice discounts to a presentation
  - **Apply Extra Savings Discount**
    - Make a selection that makes most sense to the practice from the options provided. This is where you would apply insurance discounts if you are in network with a carrier. Only one extra savings discount can be applied per contract.
  - **Apply High Down Threshold**
    - Make a selection that makes most sense to the practice from the options provided.

## **Presentation Defaults Tab**

- o Display Until Valid Date - Duration
  - Select number of days and enable toggle
  - Or Keep toggle disabled to not display when the presentation will expire to the patient.

## **Notifications Tab**

- Email Alerts
  - Toggle Alerts on for practice to receive alerts when presentation reaches milestones such as Accepted, Signed, Payment Method Entered etc.

## **Customization Tab**

- Investment Options Report
  - Edit Copy
  - Show Footer
- Payment Plans
  - Extra Savings
  - Standard
  - Extended
  - My Plan