

Assigning a Presentation to Another User in AccepTx Pro [1.0]

- The TC is assigned to the presentations that they create:

Presentations

+ Add Presentation

Everyone's Presentations ▾ All Statuses ▾ Date Created: Anytime to Anytime Search...

Patient	Age	Gender	Coordinator	Created	Presented ▾	Status	1st Appointment	
Jayme Athena	21	F	Maria Smith	03/08/2021	03/08/2021	Draft		Actions ▾

- When the presentation is presented to the patient, the TC's name appears in the top left corner of the screen:

AccepTx Pro powered by OrthoBanc

Established for Jayme Athena
Valid until 5/20/2021

Maria Smith

Maria Smith
Treatment Coordinator

Share End Presented 3/8/2021 Actions ▾

Invisalign® 10 Payment Details >

Treatment Overview [Print Treatment Overview](#)

Invisalign® Express consist of 10 or fewer clear aligners to correct minor misalignment, spacing, or general relapse following prior orthodontic treatment.

Your specific treatment options were discussed at your initial consultation. Invisalign® treatment is a great option available to you. The treatment fee will include:

- Photographs at the start and finish of treatment
- All diagnostic X-ray's
- Monitoring of aligner treatment
- One upper removable retainer and one lower bonded retainer
- Check ups for one year once Invisalign® treatment is complete while practicing retainer compliance

**Note: There will be a separate charge for any lost aligners. This is not included in the Treatment Fee.

**Treatments such as extractions, cleanings, or any other dental procedures during or after treatment are not included in the fee provided. This description is simply to help you review your options. Your plan is customized to your specific needs and was discussed at your initial consultation. Your care from start to finish is extremely important to us, we look forward to working with you to obtain the beautiful smile you deserve.*

AccepTx Pro powered by OrthoBanc

Welcome to AccepTx Pro – your ticket to a fast, easy, and fun experience, where you can personalize your orthodontic treatment, payment options, and savings to make the smartest decision for you and your

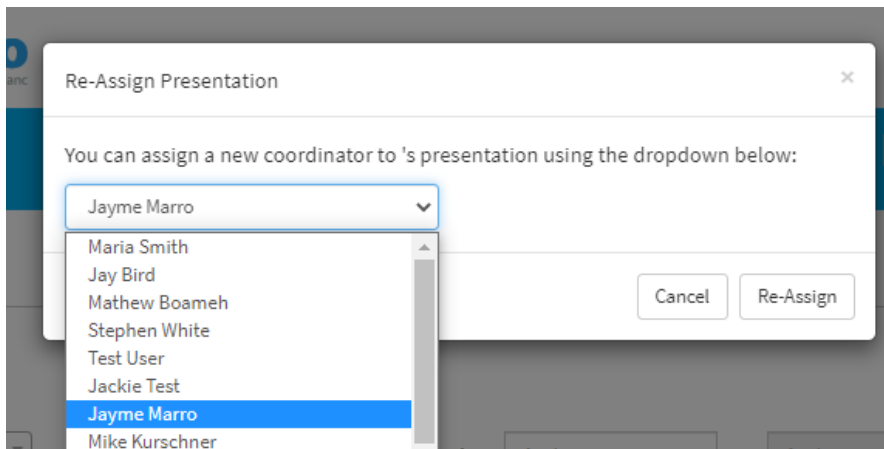
- **To change the TC to another user:**
 - From the presentations tab, click the actions button for the presentation
 - Select “Re-Assign”

Presentations + Add Presentation

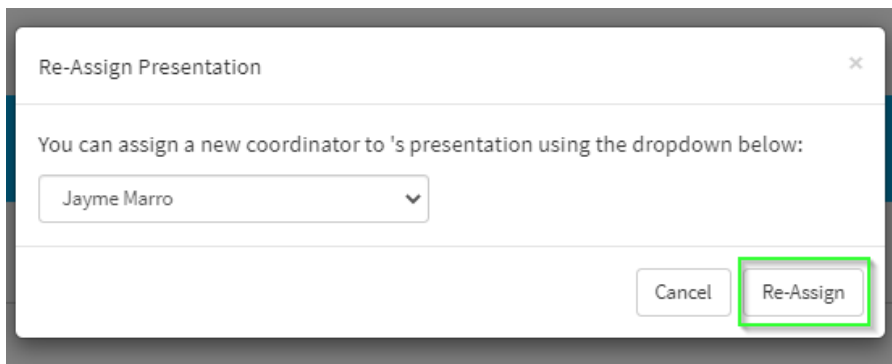
Everyone's Presentations | All Statuses | Date Created: Anytime to Anytime | Search...

Patient	Age	Gender	Coordinator	Created	Presented	Status	1st Appointment	
Jayme Athena	21	F	Maria Smith	03/08/2021	03/08/2021	Presented		Actions
tito grito	42	M	Maria Smith	02/08/2021	02/08/2021	Expired		View
Shane Warne	20	F	minal bhungani	02/04/2021	02/04/2021	Draft		Edit
Shane Warne	20	F	minal bhungani	02/04/2021	02/04/2021	Draft		Place On Hold
Email Email	20	M	Maria Smith	01/27/2021	01/27/2021	Final	01/29/2021	Decline
TO SMILE ADJUSTERS TAKE ME BACK	21	F	Maria Smith	01/06/2021	01/06/2021	Draft		Delete
								Re-Assign
								Share
								View Activity Log

- **Select the new TC from the list of users that have access to the location the presentation has been set up in.**



- **Click the Re-Assign button**



- The New TCs name will be listed for that presentation on the presentation list.

+ Add Presentation

Presentations

Everyone's Presentations | All Statuses | Date Created: Anytime to Anytime | Search...

Patient	Age	Gender	Coordinator	Created	Presented	Status	1st Appointment	
Jayme Athena	21	F	Jayme Marro	03/08/2021	03/08/2021	Presented		Actions
tito grito	42	M	Maria Smith	02/08/2021	02/08/2021	Expired		Actions
Shane Warne	20	F	minal bhungani	02/04/2021	02/04/2021	Draft		Actions

- When the presentation is presented, it will now show the new TC in the top left corner.

Established for Jayme Athena

Valid until 5/20/2021

Maria Smith

Jayme Marro

Service Rep

Share

End

Presented 3/8/2021

Actions

Invisalign® 10

Payment Details >

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Treatment Overview

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For support call 1-888-758-0585 Option 2

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