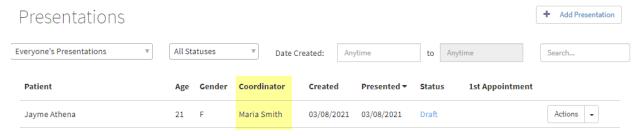# AccepTx Pro
powered by OrthoBanc

Adding/Updating & Bilingual Forms in AccepTx Pro [1.0]

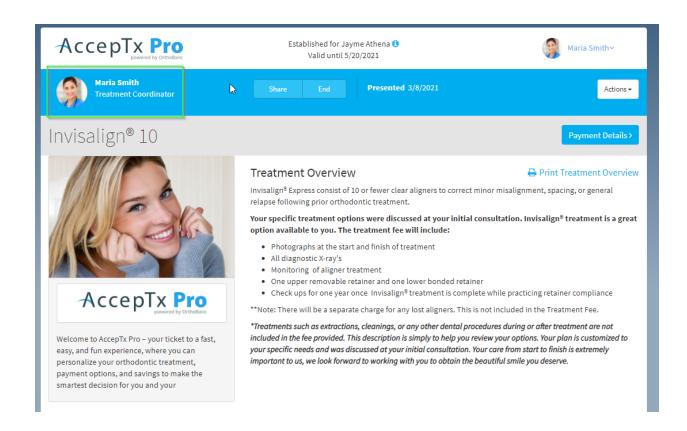## Step 1: Add New Forms [i.e bilingual forms, additional, etc.]

- If you would like to use custom forms or add additional forms please contact Maria Allen directly: maria.allen@orthofi.com
  - o Please note the charge for custom forms is: $75 per form, per language, with a maximum of 3 hours per form; any additional time will incur a $25 per hour charge with a minimum of 1 hour being billed. If forms are submitted in any format other than Word, there will be an additional $50 conversion charge per form. Maria will be able to assist with more information about our Custom Forms service and pricing

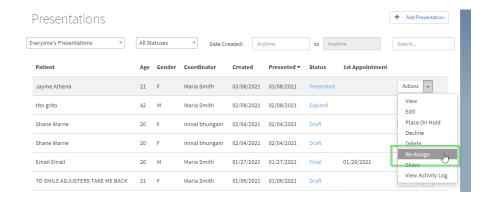## Step 2: Assign Additional Forms to Treatment Options

- After adding your new/custom form
- Log into your AccepTx Pro account > Administration > Forms > Additional Forms > Actions > Edit > Assign to Treatments
  - o This process will need to be done when you add new treatment options to the components section if you want the patient to be able to eSign
  - o **Important:** If you have bilingual forms, only one form can be attached to one treatment (i.e. one language per form per treatment option)

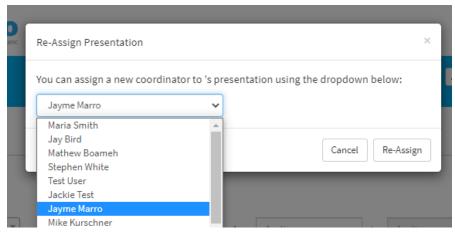 - **The TC is assigned to the presentations that they create:**

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

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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.

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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
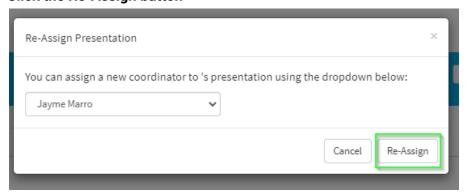
2

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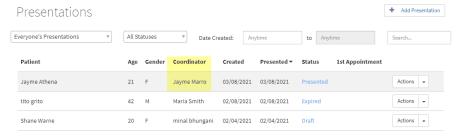   - Select "Re-Assign"

- **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.**

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