



## 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](mailto:maria.allen@orthofi.com)
  - 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
  - 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
  - **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:**

#### 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:**



Maria Smith  
Treatment Coordinator

Share

End

Presented 3/8/2021

Actions ▾

## Invisalign® 10

Payment Details >



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

### 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.***

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

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

Re-Assign Presentation

You can assign a new coordinator to 's presentation using the dropdown below:

Jayme Marro

- Maria Smith
- Jay Bird
- Mathew Boameh
- Stephen White
- Test User
- Jackie Test
- Jayme Marro
- Mike Kurschner

Cancel Re-Assign

- **Click the Re-Assign button**

Re-Assign Presentation

You can assign a new coordinator to 's presentation using the dropdown below:

Jayme Marro

Cancel Re-Assign

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

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	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

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