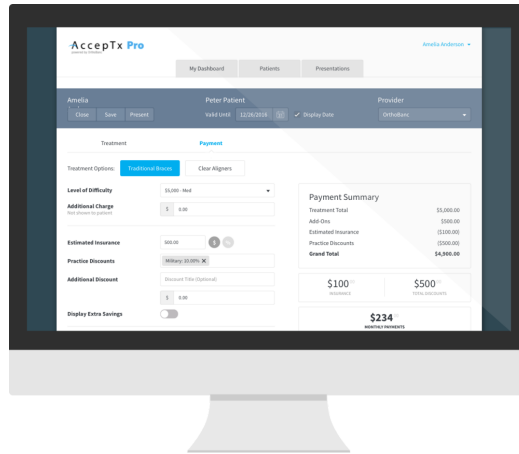




USER GUIDE

September 2021

Tips to Maximize Your AccepTx Pro Tool



PERSONALIZE THE TOOL THROUGH THE ADMIN SETTINGS

- Helps create the connection with the patient and /or FRP
- Allows the patient and/ or FRP to have the ability to go back, later, and fully absorb what was discussed during the presentation appointment.
- During the presentation appointment, the patient is given a great amount of information about a subject matter that most are not familiar with. A non-familiar person will only recall a fragment of the information presented; customizing your tool will help give them the written version of the information you verbally discussed in office.

ALLOW THE PATIENT OR FRP TO ENGAGE WITH THE SMILE ADJUSTER

- Gives the FRP a sense of control over their financial selections
- Creates a feeling of flexibility and understanding in regards to various financial situations for your FRP

GIVE TC THE FLEXIBILITY TO OVERRIDE MANY OF THE DEFAULT SETTINGS

- Once your tool is set up, have communication of what is acceptable to override and what settings are not negotiable
 - (PIF, multiple discounts, altering the minimal down payment, etc..)



MANAGING USERS

ADDING A USER

- Log into your AccepTx Pro account > Administration > Users
- The Username and Email address should be the same
 - This allows the user to reset their own password if they forget it
- Select Rights:
 - Admin
 - If admin is selected, it will give full ability for that team member to change all settings, components, and logo tabs under the Admin tab.
 - Treatment Coordinator
 - Financial Coordinator
- Click Actions > Edit > toggle on 'EMAIL ALERTS' to set up alerts
 - This is to ensure that multiple team members can access emails if someone is out of the office

INACTIVATING A USER

- Click on the Administration tab
- Click on the Users tab
- Find the employee that you wish to inactivate and toggle to Inactive. The user can be re-activated by toggling back to active in the event the employee returns.



CUSTOMIZE DEFAULT PRESENTATION SETTINGS

UPDATING SETTINGS

- Log into your AccepTx Pro account > Administration > Settings

REVIEW PAYMENT DETAIL 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
 - 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

TURN ON 'EXTRA SAVINGS MASTER' TO ENABLE ALL SETTINGS

AccepTx Pro account > Administration > Settings

- **Payment-In-Full Option**
 - Allows you to provide values for Credit Card or Cash/Check options
- **High Down Option**
 - Leave disabled
 - This option allows you to give a discount if the Responsible Party opts for a higher down payment.
 - Set a threshold of % of the treatment total and value for discount
- **Bank Draft Option**
 - Leave disabled
 - this allows you to give a discount to the Responsible Party if they opt to make monthly payments from a bank account instead of a credit card.
- **Discounts (apply to)**
 - 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
- **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

- **Display Until Valid Date - Duration**

- ON
 - Select number of days before presentation is going to expire
- OFF
 - It won't display when the presentation is about to expire.

NOTIFICATIONS TAB

- **Email Alerts**

- ON
 - Receive alerts when presentation reaches milestones such as Accepted, Signed, Payment Method Entered etc.

CUSTOMIZATIONS TAB

- **Investment Options Reports**

- Edit Copy
- Show Footer

- **Payment Plans**

- Extra Savings
- Standard
- Extended
- My Plan



COMPONENTS + TX OPTIONS + ADD-ONS

ADD-ONS

- Log into your AccepTx Pro account > Administration > Components > _____
 - Make it easier by adding all add-ons prior to adding/updating treatments.

TREATMENTS

- Office only sees the title
- Patient only sees Display to Patient and the Treatment Description
- Select age range
- Customize all the treatments
- Select Add-Ons
 - Must be attached to the treatment to populate in the presentation to select
- Set Default Treatment Duration
 - Can be adjusted prior to presenting if needed
- Set price levels
 - Recommended to add a \$1 price level to each treatment so if the treatment is ever below the standard price level, the office can select \$1 and increase from there
- If a treatment is ever set to inactive, go to the Active menu and switch to Inactive to be able to reactivate that treatment.

DISCOUNTS AND SPECIALS

- Based on the office discounts; can set up special discounts that expire if they are running a promotion or a limited time promotion

PRICES

- This tab is most helpful when you are doing bulk changes, end of year increases, ect.
 - All treatments are listed on this screen
 - Edit price level name or dollar amount

IMAGES

- Attach the pictures you would like to be options when you select a treatment option – this picture will display for the patient
- Rename images or reassign the treatments for which the images show



UPDATING LOGO AND MARKETING MESSAGE

UPDATE LOGO

- Please contact AccepTx Pro Support for assistance with updating your logo

CREATE CUSTOM MARKETING MESSAGE

- Administration > Locations > Actions > Edit Marketing Info
- Edit the preformatted text in the Marketing Text open field to provide interesting facts about the practice or the doctors accolades
- Click Save



FORMS

ASSIGNING ADDITIONAL FORMS TO TREATMENT OPTIONS

- 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
- If you would like to use custom forms or make edits to default forms, please contact Maria Allen directly: maria.allen@orthofi.com
 - Maria will be able to assist with more information about our Custom Forms service and pricing.

CREATE CUSTOM MARKETING MESSAGE

- Administration > Locations > Actions > Edit Marketing Info
 - 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

CUSTOM FORMS

- If you would like to use custom forms please email Maria.Allen@OrthoFi.com
- \$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

If you have questions that are not answered in this job aid, please contact support



Email Notifications

Email Type	Description	Recipient	Trigger	Product	Payment Plan service Enabled via OrthoBanc
New User	Welcome email to new users when an account is created	Client Users	User account is successfully created	AccepTx Pro	Not Required
Forgot Password	Update a forgotten password to regain access to the AccepTx Pro	Client Users	User password changes (Forgot password link)	AccepTx Pro	Not Required
Reset Password	Email sent to user after password has been reset by user (following admin choosing Reset Password in user actions dropdown)	Client Users	User resets password through the AP Reset Password pages	AccepTx Pro	Not Required
Re-enabled User Account	Email sent to user when the user's account has been re-enabled	Client Users	Admin changes the user's status from inactive to active (re-enabling the user)	AccepTx Pro	Not Required
Share Presentation	Email RP access to treatment package presentation	RP	TC selects the "Share" button and the email address is entered	AccepTx Pro	Not Required
First Appointment Date Set	Alert when the TC sets the appointment/payment date	RP	User saves the first appointment/payment date AND the Responsible Party has a valid email address	AccepTx Pro	Not Required
RP eSigns Agreement - Appointment Date Needed	Alert when the treatment agreement is signed and the patient needs first appt date set	TC	RP eSigns the Treatment Agreement, AND 1st appt date not set, AND Practice Setting for email alerts is on	AccepTx Pro	Optional
RP eSigns Agreement	Alert when the RPP is signed	TC	RP eSigns the OB Recurring Payment Plan (RPP) agreement AND Practice Setting for email alerts is on	AccepTx Pro & OrthoBanc	Both Required



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

The screenshot displays the AccepTx Pro interface with the 'Treatment' tab selected. The interface is divided into three main sections: 'Image package', 'Treatment', and 'Skip Treatment Details'. The 'Image package' section shows 'Woman 18+' selected. The 'Treatment' section has a dropdown menu for 'Select a treatment...' and a 'Show All' checkbox. The 'Skip Treatment Details' section has a toggle switch. Below these are three treatment options: 'Aligners - Adult' (18 months), 'Traditional Braces - Adult' (24 months), and 'Accelerated Treatment' (\$699.00). Each option has an 'Add-ons...' dropdown. The right side of the interface shows image selection for each treatment type: 'Resting on Hands' for Aligners, 'Wavy Long Hair' for Traditional Braces, and 'Traditional Braces' for Accelerated Treatment. The footer contains support information, a privacy policy link, and a copyright notice.

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.

Payment Duration

Treatment	Treatment Months	Payment Months	Extension	Fee
Traditional Braces	24	23 <input type="text" value="27"/>	<input checked="" type="checkbox"/>	<input type="text" value="3"/> %

Minimum Down Payment Use Practice Setting \$500.00

Default Down Payment Use Practice Setting \$1,500.00



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 Adjusters 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:

- Draft – TC has started to create the presentation, but it has not been presented
- Presented – TC has presented the presentation but patient has not accepted treatment
- Hold – 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.
- Accepted – Patient has accepted treatment but forms have not been completed
- Signed – Patient has accepted treatment and forms have been completed but down payment has not been collected
- Expired – 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
- Final – Treatment has been accepted, forms are completed, down payment and monthly agreement has been completed – Patient is ready for their appointment!!
- Declined – 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



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)

A screenshot of the AccepTx Pro payment form. At the top, it shows a summary: Total Amount Financed: \$1,377.50, Monthly Payment: \$82.00, and Payment Start Date: 4/5/2021. Below this is the "Primary Payment Method" section, which has two radio buttons: "Bank Account" (selected) and "Credit Card". Underneath, there are fields for "Name on Account" (John doe), "Account Number" (11111), and "Routing Number" (064000017). There is also an "Account Type" section with a "Checking" radio button. A "Save" button is located at the bottom right of the form.

- 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.



Default Descriptions

Invisalign Teen

- Invisalign Teen® treatment gives your teenager a great smile without metal braces - to help them feel confident in their smiles and themselves. The Invisalign Teen® system is a series of customized, virtually invisible aligners. The aligners gradually move teeth to help your teen achieve a great smile and proper bite. On average treatment takes about 12-18 months, wearing aligners 20-22 hours a day. Because the aligners are removable, you can easily brush and floss for proper hygiene.

Invisalign Adult

- Invisalign® gives you a great smile without metal braces - to help you feel confident in your smile and yourself. The Invisalign® system is a series of customized, virtually invisible aligners. The aligners gradually move teeth to help you achieve a great smile and proper bite. On average treatment takes about 12-18 months, wearing aligners 20-22 hours a day. Your specific time estimate was discussed at your initial examination appointment. Because the aligners are removable, you can easily brush and floss for proper hygiene.

Invisalign® 10

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

Invisalign® Express 5

- Invisalign® Express 5 consists of 5 or fewer clear aligners to correct minor misalignment, spacing, or general relapse following prior orthodontic treatment.

Limited Treatment

- Traditional braces are bonded to all the teeth using orthodontic adhesive. Metal braces are the most common; however, there are other options that can be customized to fit your lifestyle. Clear resin braces are an option for an additional expense.

Early Treatment

- Early Treatment typically begins between ages six to nine. The goal of treatment is to correct the growth of the jaw and certain bite problems, such as crowding, crossbite, underbite, or to help stop a thumb or finger sucking habits. Phase One treatment also helps to make room for permanent teeth to come in properly, possibly lessening the chance of extractions in the future.

Phase II

- Between the ages of 11 and 15 is the most common time for Phase II orthodontic treatment, and for good reasons. By 12, most if not all the permanent teeth have erupted and are in place, and crooked teeth, gaps and bad bites can easily be detected. These problems will hardly ever correct themselves, so this is when most parents decide to seek orthodontic treatment. This is also a good time for orthodontic treatment because many negative associations of braces are not present. Many children in this age range undergo orthodontic treatment, and children are very often able to be convinced to wear braces because they see their friends wearing them, too, and want to fit in.

Adult

- Traditional braces will be bonded on the teeth with orthodontic adhesive. Traditional braces (metal) are the most common, however there are other options that can be customized to fit your lifestyle. (Clear) Ceramic braces are an option for the upper front teeth. This option would have been discussed at your initial examination appointment. Typical treatment time is 18-24 months, but your actual treatment time will vary based on several factors.

Adolescent

- Traditional braces will be bonded on the teeth with orthodontic adhesive. Traditional braces (metal) are the most common, however there are other options that can be customized to fit your lifestyle. (Clear) Ceramic braces are an option for the upper front teeth. This option would have been discussed at your initial examination appointment. Typical treatment time is 18-24 months, but your actual treatment time will vary based on several factors.

Transfer

- It happens sometimes: we begin orthodontic treatment, and life takes us to a new destination. Changing an orthodontist mid-treatment can be tricky. You have all this stuff in your mouth, and somebody must take care of it! We are happy to fulfill your needs.

Aligner Tx

- Clear Aligners offer a way to straighten teeth without braces. Clear aligners are invisible, removable trays that are made of smooth plastic. A series of custom aligners are made specifically for each patient. You will wear them throughout the day (at least 20-22 hours per day) and remove them when eating or brushing and flossing your teeth.