

# OrthoBanc

Integration Instructions for Edge Cloud



With this integration, you access OrthoBanc's state-of-the-art system which provides patient credit risk assessment in just seconds. After you create payment plans, they are submitted from Edge Cloud to OrthoBanc. OrthoBanc collects payments, manages credit card expiration dates and NSF/failed payment follow-up, and deposits are downloaded from OrthoBanc and posted directly in patient ledgers. No additional Edge Cloud module is required.

## Setup

Before you begin, contact OrthoBanc and get the following information:

User Name: \_\_\_\_\_ Provider ID: \_\_\_\_\_  
Password: \_\_\_\_\_ Provider ID#2 (optional): \_\_\_\_\_  
Provider ID#3 (optional): \_\_\_\_\_  
Provider ID#4 (optional): \_\_\_\_\_

- 1 In the Home Ribbon bar, select Editors in the Tools tab.
- 2 Select **System Integrations** under Integrations.
- 3 In the OrthoBanc section, click **New**.
- 4 Double-click each field to add the values. All of the information is provided by OrthoBanc.
- 5 If you wish to use different Provider IDs for different offices, set the Office and Orthodontist designation.
- 6 The default CC and EFT account lists will populate from the Payment Accounts editor. These two fields can be used to assign the default Payment Account to be used with new OrthoBanc accounts assigned to this Provider ID.
- 7 Click Test to ensure everything was typed in correctly.

The screenshot shows a software interface with a header bar containing "OB OrthoBanc" and a "New" button. Below the header is a table with the following columns: User Name, Password, Provider ID, Office, Orthodontist, Inactive, Default CC Account, Default EFT Account, and a Test button. The table contains two rows of data.

User Name	Password	Provider ID	Office	Orthodontist	Inactive	Default CC Account	Default EFT Account	Test
OrthoII	<i>Dbt-click to edit</i>	op00001000	None	JS	<input type="checkbox"/>			Test
OrthoII	<i>Dbt-click to edit</i>	op00001395	None	CJ	<input type="checkbox"/>			Test

## Linking Patients with OrthoBanc

- 1 Open a patient.
- 2 In the Patient tab, select OrthoBanc – Link Patient from the Integrations drop down list.
- 3 Select Link to Existing OrthoBanc Patient.

- 4 The *Find OrthoBanc Patient* window will open. Use the Provider drop down to select the Provider ID, and use the Last Name, OrthoBanc Reference Number, Last name first name, and Primary Code fields to search for the patient record to link to OrthoBanc. Then click **Select** to link the patient.

## Creating a New OrthoBanc Patient

- 1 Open a patient.
- 2 In the Patient ribbon, select OrthoBanc – Link Patient from the Integrations from the drop down list.
- 3 Select New OrthoBanc Patient.
- 4 Select the appropriate OrthoBanc provider from the list.
- 5 Click **OK** when the Patient Created window appears.

## Viewing OrthoBanc Accounts

This part of the integration allows the user to set up a specific contract for OrthoBanc, or to view and/or edit details about an existing OrthoBanc contract.

By clicking either View Accounts from the patient’s information panel, or selecting Orthobanc – View Accounts from the Tasks section of the Home ribbon bar, the user can open the OrthoBanc Accounts tab.

If opened from the patient record, it will open with the patient’s name, OrthoBanc reference number, and provider ID pre-loaded. If opened from the Home ribbon, the user can use the Load button to load a patient who has already been linked with OrthoBanc.

If the patient’s responsible party has existing accounts in OrthoBanc unlinked to the patient, they will be listed in the Unlinked Accounts section

**Patient:** Load

Name: Carla P Joiner

Reference Number: ob00988470

Provider: ID: op00001000 - Office: <All> - Dr: JS

Dashboard x Carla P Joiner - 05-164 - WA x OrthoBanc Accounts x

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**Patient:** Load

Name: [Carla P Joiner](#)

Reference Number: ob00988470

Provider: ID: op00001000 - Office: <All> - Dr: JS

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**Accounts:** New

*No OrthoBanc accounts have been created or linked to this patient*

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**Un-linked Accounts:** Link

Responsible ID	Name	Address
1046232	Rob Cindy Joiner	123 Main St, Ames, IA 50010
1045865	Rob Cindy Joiner	123 Main St, Ames, IA 50010

of the OrthoBanc Accounts tab. To link to the patient, select the desired account and click **Link**.

If no Unlinked Accounts exist, the user can select **New** to create a new one. If there are any missing patient details, such as a social security number, the system will display a warning message and the new account will not be created.

Once an account is linked or created from scratch, it will appear under the Accounts section.

**Accounts:** New

Actions [Rob Cindy Joiner](#)

- Add Payment Account
- Get Credit Recommendation
- Un-link Account from Res. Party

General OB Account

This section will display details about the OrthoBanc account, including the Responsible ID, the Status of the OrthoBanc account, Credit Recommendation details, and information from the linked contract. To link a contract, click the **No Linked Contract** link to choose from the responsible party's contracts.

The Actions button along the top contains additional options.

**Add Payment Account:** This option will open a new window which will allow the user to submit details about the contract and payment plan to OrthoBanc.

For deposits to be withdrawn from an OrthoBanc payment plan the following must be true; an Edge contract must be selected, a primary payment method must exist, the draft balance must be defined and a draft start date must be provided. Note: The primary payment method and start date may be left blank and filled in at a later time, but the payment plan cannot be made active until they are present.

**Primary Payment Method**

Add Bank Account Add Credit Card

**Secondary Payment Method (optional)**

Add Bank Account Add Credit Card

**Plan Details**

Plan Balance:   
 Monthly Payment:   
 Payment Start Date: Select a date  Clear  
*\*Must be 5th, 12th, 19th or 26th*

**Edge Payment Account**

Account: CreditCard - Credit Card - Global

**Select Contract**

Phase II - Balance: \$234.00

**Contract Charge List**

Date	Description	Amount
2/10/2011	Initial Fee	\$596.00
3/22/2011	Installment Due	\$117.00
4/22/2011	Installment Due	\$117.00
5/23/2011	Installment Due	\$117.00
6/22/2011	Installment Due	\$117.00
7/23/2011	Installment Due	\$117.00
8/22/2011	Installment Due	\$117.00
9/22/2011	Installment Due	\$117.00
10/23/2011	Installment Due	\$117.00
11/20/2011	Installment Due	\$117.00
12/21/2011	Installment Due	\$117.00
1/20/2012	Installment Due	\$117.00

Save Cancel

The user can set up a payment method (bank account or credit card), plan details, the payment account that payments will process through, and the contract within Edge Cloud that this will be concerning. Once the user clicks Save, those payment plan details will be available under the Accounts section in the OrthoBanc Account tab.

**Get Credit Recommendation:** This will submit a request for a credit recommendation to OrthoBanc.

**Un-Link Account from Res. Party:** This will unlink the OrthoBanc account from the responsible party record, placing the responsible party back under Unlinked Accounts.

Once an account has been linked and set up with OrthoBanc, additional Actions are available:

**Update Payment Account:** This allows the user to update the Payment Account information that was set in the OrthoBanc Account Editor.

**Adjust Account:** Provides the user with additional options to change the account balance, place the account on hold, or to withdraw the account.

Each option gives the user an additional dialog box:

**Change Balance:**

Adjust Balance

Current Balance: \$5,000.00  
 Adjustment Amount:

Increase  
 Decrease

Adjust Cancel

Accounts: New

Actions: Rob Cindy Joiner

Account Number: 3461  
 Balance: \$5,000.00  
 Monthly Payment: \$100.00  
 Payment Date: 12th of each month  
 Payment Method:  
 2nd Payment Method:

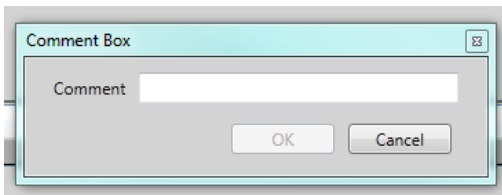
General OB Account

Accounts: New

Actions: Rob Cindy Joiner

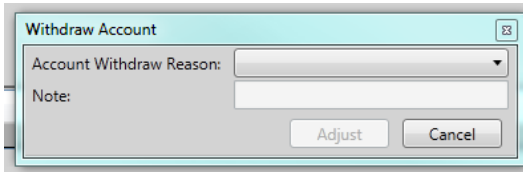
- Update Payment Account
- Adjust Account
- Get Payment Plan Form
- Get Credit Recommendation
- Un-link Account from Res. Party

## Place Account on Hold:



A dialog box titled "Comment Box" with a close button in the top right corner. It contains a text input field labeled "Comment" and two buttons at the bottom: "OK" and "Cancel".

## Withdraw Account:



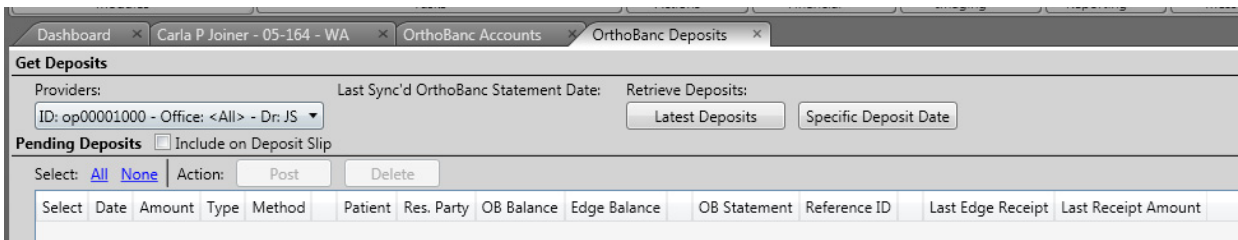
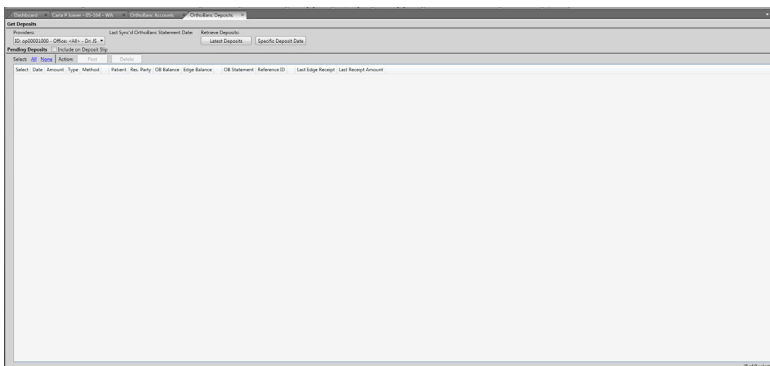
A dialog box titled "Withdraw Account" with a close button in the top right corner. It contains a dropdown menu labeled "Account Withdraw Reason:", a text input field labeled "Note:", and two buttons at the bottom: "Adjust" and "Cancel".

**Get Payment Plan Form:** Generates a PDF form pre-populated with information from the patient's record for submission to OrthoBanc.

# Using the Integration

## Deposits

In the Integrations drop down from the Tasks section of the Home ribbon bar, select OrthoBanc – Deposits.



The options for this tab are all located along the top of the screen. Under Get Deposits, the Providers drop down allows the user to select the Provider ID to get deposits for.

**Last Sync'd OrthoBanc Statement Date** displays the last date on which deposits were downloaded.

**Retrieve Deposits** gives you two options for downloading deposits, to either get the latest deposits available, or download deposits for a specific date.

Once either option has been selected, a list of patients with pending deposits will be displayed. The user can use the All or None links to select all of the patients listed, or none of them. They can also be selected or deselected manually. Once the desired patients have been selected, you can click **Post** to post the transactions within Edge Cloud, or **Delete** to delete them.

If any accounts haven't been linked in Edge Cloud, these accounts will appear in the Unlinked Deposits list at the top of your results. To link these accounts to a patient in Edge Cloud, select Click to Link links in the Edge Patient, Edge Contract, and Payment Account columns. In each case, Edge Cloud will open a new dialog allowing the user to select the patient, contract, or payment account for that deposit.

**Get Deposits**

Providers: ID: op00001000 - Office: <All> - Dr: JS      Last Sync'd OrthoBanc Statement Date: Monday, January 31, 2011      Retrieve Deposits: Latest Deposits      Specific Deposit Date

**Un-linked Deposits**

Date	Amount	Type	OrthoBanc Patient	Edge Patient	OrthoBanc Res. Party	OrthoBanc Balance	Edge Contract	Payment Method	Payment Account
12/26/2007	(\$200.00)	Reversal	Lisa Bblack	<a href="#">Click to link!</a>	James Bblack	\$0.00	<a href="#">Click to link!</a>		<a href="#">Click to link!</a>
1/5/2008	\$200.00	Payment	Lisa Bblack	<a href="#">Click to link!</a>	James Bblack	\$0.00	<a href="#">Click to link!</a>	Check	<a href="#">Click to link!</a>
1/5/2008	\$125.00	Payment	Annie Bbrown	09-608 - Miss Cheryl Dowling	Rick Bbrown	\$300.00	Pre-Treat - Mr. & Mrs. James and Carley Dowling	Credit Card	<a href="#">Click to link!</a>
1/5/2008	\$343.35	Payment	Jackie Wwhite	<a href="#">Click to link!</a>	Vickie Wwhite	\$0.00	<a href="#">Click to link!</a>	Credit Card	<a href="#">Click to link!</a>

**Pending Deposits**     Include on Deposit Slip

Select: [All](#)   [None](#)    Action:     

Select	Date	Amount	Type	Method	Patient	Res. Party	OB Balance	Edge Balance	OB Statement	Reference ID	Last Edge Receipt	Last Receipt Amount

The **Include on Deposit Slip** checkbox allows the user to choose whether or not to display the posted OrthoBanc transactions on that day's deposit slip.

## Contact

**OrthoBanc**  
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 (800) 346-4504 or (515) 233-1026