OrthoBanc

Integration Instructions for Edge Cloud

ORTHO2

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.

OB **OrthoBanc** New

User Name	Password	Provider ID	Office	Orthodontist	Inactive	Default CC Account	Default EFT Account	
OrthoII	*Dbl-click to edit*	op00001000	None	JS	☐			Test
OrthoII	*Dbl-click to edit*	op00001395	None	CJ	☐			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.

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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

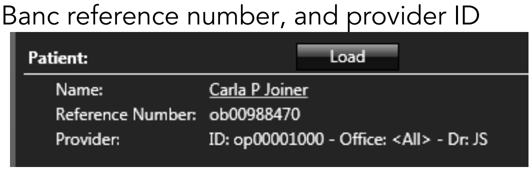
1. Open a patient.
2. In the Patient ribbon, select OrthoBanc – Link Patient from the Integrations from the drop down list.
3. Select New OrthoBanc Patient.
4. Select the appropriate OrthoBanc provider from the list.
5. Click **OK** when the Patient Created window appears.

Viewing OrthoBanc Accounts

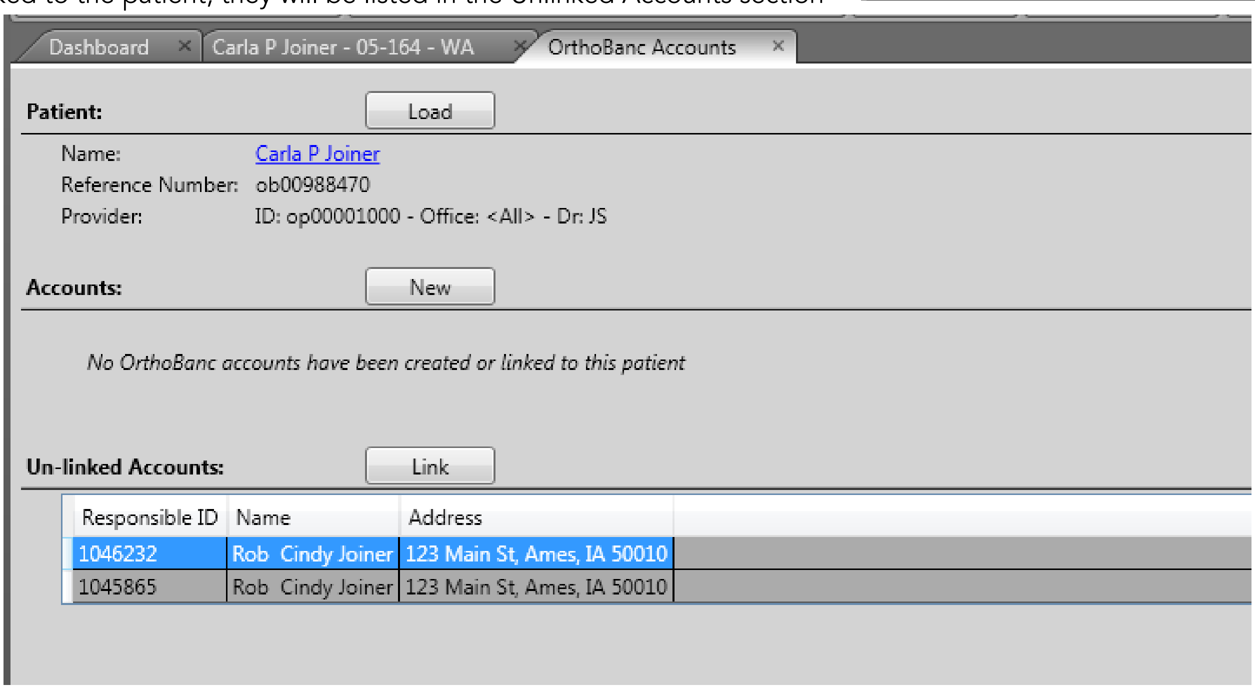
This part of the integration allows the user to set up a specific contract for OrthoBanc, or to view and/or edit details about an existing OrthoBanc contract.

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.

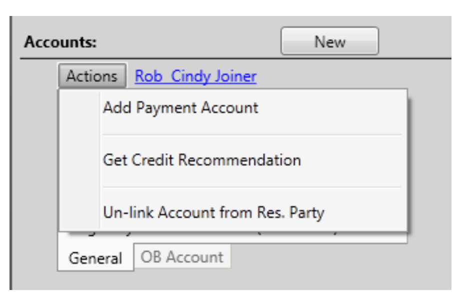


If the patient's responsible party has existing accounts in OrthoBanc unlinked to the patient, they will be listed in the Unlinked Accounts section of the OrthoBanc Accounts tab. To link to the patient, select the desired account and click **Link**.



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.

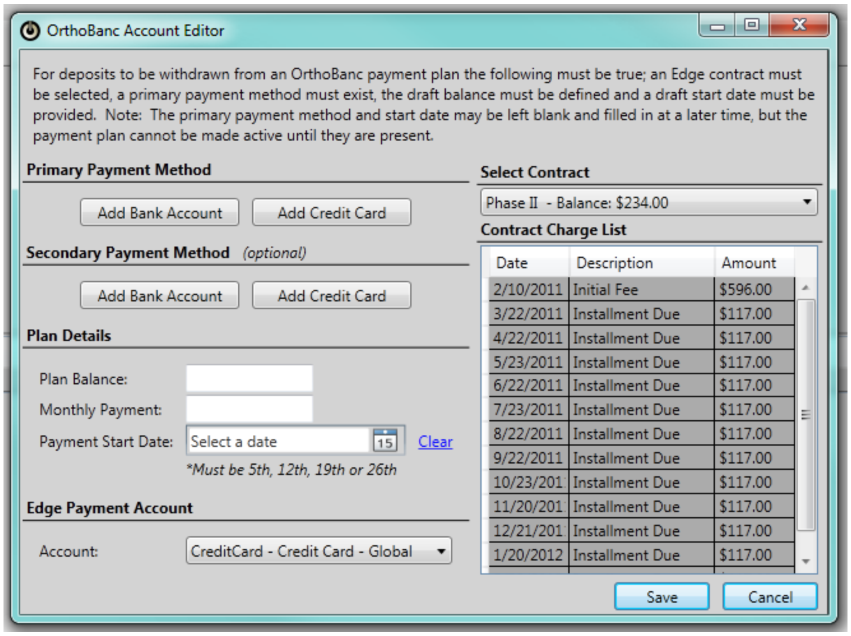
Once an account is linked or created from scratch, it will appear under the Accounts section.



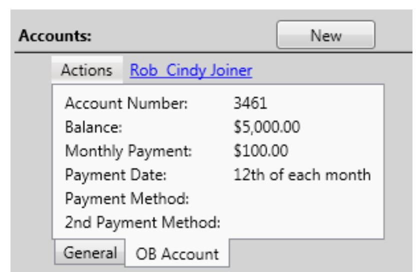
This section will display details about the OrthoBanc account, including the Responsible ID, the Status of the OrthoBanc account, Credit Recommendation details, and information from the linked contract. To link a contract, click the **No Linked Contract** link to choose from the responsible party's contracts.

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.



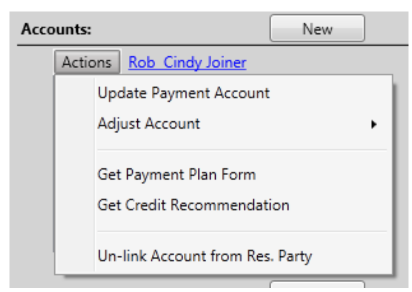
The user can set up a payment method (bank account or credit card), plan details, the payment account that payments will process through, and the contract within Edge Cloud that this will be concerning. Once the user clicks Save, those payment plan details will be available under the Accounts section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

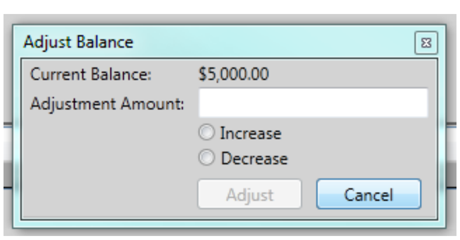


Update Payment Account: This allows the user to update the Payment Account information that was set in the OrthoBanc Account Editor.

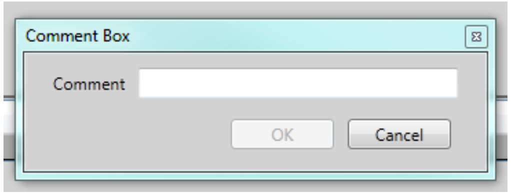
Adjust Account: Provides the user with additional options to change the account balance, place the account on hold, or to withdraw the account.

Each option gives the user an additional dialog box:

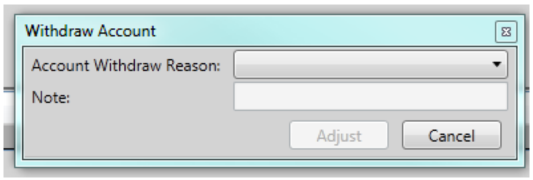
Change Balance:



Place Account on Hold:



Withdraw Account:

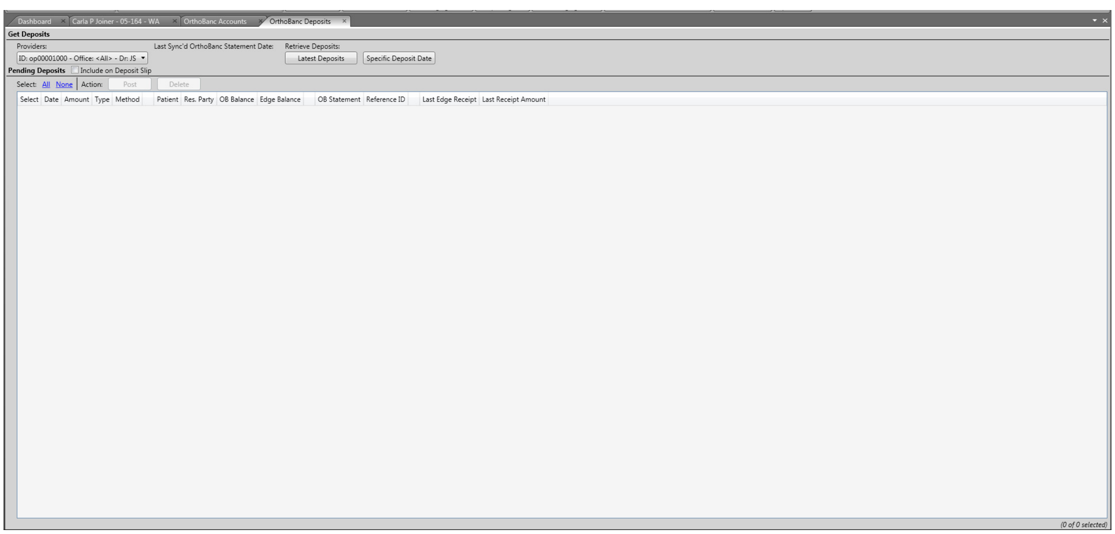


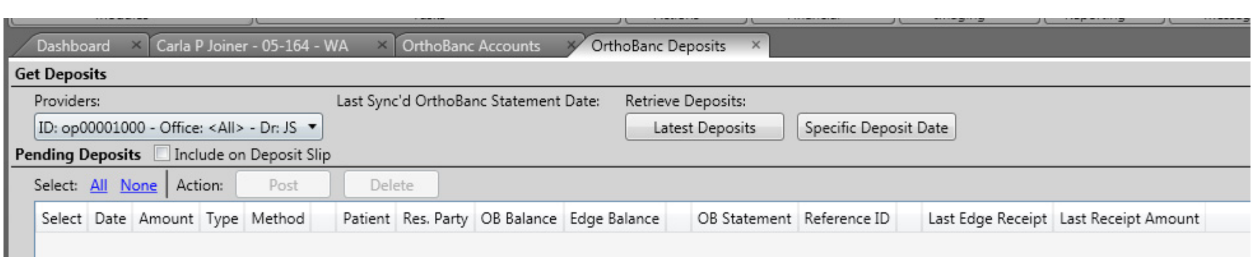
Get Payment Plan Form: Generates a PDF form pre-populated with information from the patient's record for submission to OrthoBanc.

Using the Integration

Deposits

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





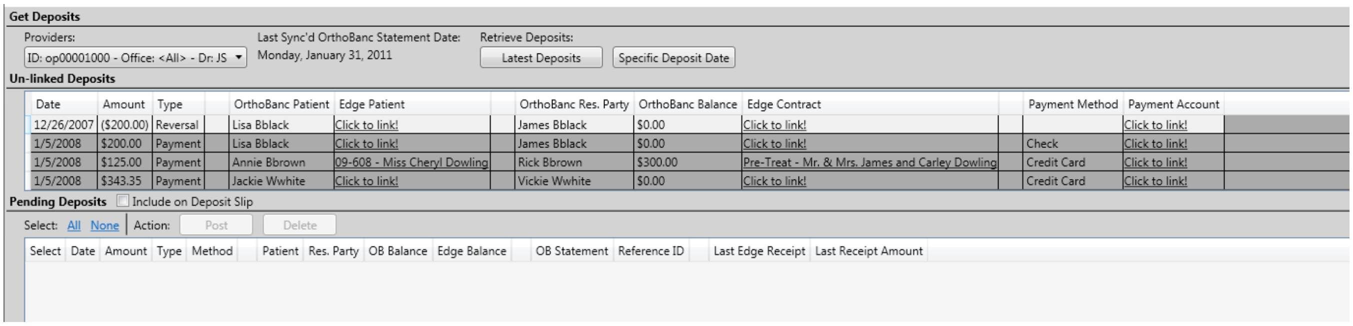
The options for this tab are all located along the top of the screen. Under Get Deposits, the Providers drop down allows the user to select the Provider ID to get deposits for.

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.



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

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