

OrthoBanc

Integration Instructions for ViewPoint



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 ViewPoint to OrthoBanc. OrthoBanc collects payments, managing credit card expiration dates and NSF/failed payment follow-up, and deposits are downloaded from OrthoBanc and posted directly in patient ledgers. No additional ViewPoint module is required.

Setup

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

Office ID: _____ Provider/Orthodontist ID: _____
Login ID: _____ Provider/Orthodontist ID#2 (optional): _____
Password _____ Provider/Orthodontist ID#3 (optional): _____
Provider/Orthodontist ID#4 (optional): _____

The OrthoBanc integration with ViewPoint 6.0, ViewPoint 7, or greater requires only the setup steps below. (If you wish to use the integration with ViewPoint 5.0, first install ViewPoint version 5.0.3180 or greater from CD. This installs several necessary files which are not available on the 5.0 AutoUpdate. Then run AutoUpdate to update to version 5.0.3186 or greater.)

- 1 From the ViewPoint Main Menu, click **[Tools & Utilities]** and then **[Electronic Payment Integrations]**. Select **OrthoBanc**, and click **[OK]**. (After selecting the OrthoBanc option the first time, please exit ViewPoint and re-enter.)
- 2 From the ViewPoint Main Menu, click **[System Tables]** and then **[System]**. Double-click **Office**. Complete the **EP Login ID**, **EP Password**, and **EP Office ID** fields with the information provided by OrthoBanc.

Optionally, you may select **Get recommendations from EP provider?** If you are set up with OrthoBanc for this service, OrthoBanc can provide financial recommendations for a specific patient. *OrthoBanc charges a fee for this option. Contact OrthoBanc if you have questions regarding this service.*

If you have multiple locations, be sure to complete these fields for each office.
- 3 From the ViewPoint Main Menu, click **[System Tables]** and then **[System]**. Double-click **Orthodontist**. Complete each **EP Orthodontist ID** field with the information provided by OrthoBanc. An orthodontist may have up to four provider IDs. If you have multiple doctors, be sure to complete these fields for each orthodontist.
- 4 *Optional, but recommended.* So that you can create subgroups for OrthoBanc patients we recommend you create one or more "OrthoBanc" contract classes. From the ViewPoint Main Menu, click **[System Tables]** and then **[Financial]**. Double-click **Contract Class**. Create your desired class(es) and click **[Close]**.

Note: Although the "Submit to OrthoBanc" process (described below) is how new patient contracts will get linked from ViewPoint to OrthoBanc, it should not be performed for patients already setup with OrthoBanc. When their deposits are downloaded for the first time (described below), a *Verify Patient* screen will appear and allow you to find that patient's record in ViewPoint.

To be able to successfully use the OrthoBanc integration, verify that the following fields are filled in for all patients with whom you will be using OrthoBanc:

- Patient first and last name and birth date
- Responsible party first and last name
- Responsible party address, city, state, and zip code
- Responsible party phone number and social security number.

Using the Integration

Once the OrthoBanc integrations has been set up, open a patient’s record to the Contract tab. An additional button labeled “Submit to OrthoBanc” will appear as shown:

Billing Name	Subscriber	Phase	Tx Fee	Allocated	Balance	Amt. Due	P	AR
Mr. & Mrs. Jack Joiner		Full Tx	\$3,500.00	\$3,500.00	\$3,500.00	\$0.00		

All phases
 Phase: Full Tx (dropdown) AutoReceipt
 Class: OrthoBanc (dropdown) Late fee: (none) (dropdown)
 Contract Description: \$3500 24 mo. standard
 Buttons: Contract Editor, Submit To OrthoBanc, Reallocate Contract

Tx. Start Date	7/29/2007
From 0 - 30	\$0.00
From 31 - 60	\$0.00
From 61 - 90	\$0.00
Over 90	\$0.00
TOTAL AMOUNT DUE	\$0.00
Days Past Due	0

Note: If you are using OrthoBanc’s optional Get Recommendation service, the button will read “OrthoBanc Options” instead of “Submit to OrthoBanc.” Click **[OrthoBanc Options]** to access the following choices: **Get Recommendation**, **Submit to OrthoBanc**, and **Cancel**. Read the “Get Recommendations” section of this document for more details.

Submit Payment Plans

Create the patient’s contract (payment plan) on the Contract tab of the Patient Folder.

Click **[Submit to OrthoBanc]** OR click **[OrthoBanc Options]** and then click **[Submit to OrthoBanc]**.

In the *Finalize data to send to OrthoBanc* screen, select the appropriate Provider ID and complete the remaining fields. Then click **[Submit]**.

Once the Submit button has been clicked, the following events will occur behind the scenes:

- ViewPoint will contact OrthoBanc and add the patient to the OrthoBanc database.
- Then the responsible party for the contract will be added to the OrthoBanc database.
- Finally, the Recurring Progress Payment Plan will be retrieved and displayed on the screen. This document is also saved to the patient’s correspondence history.

Finalize data to send to OrthoBanc

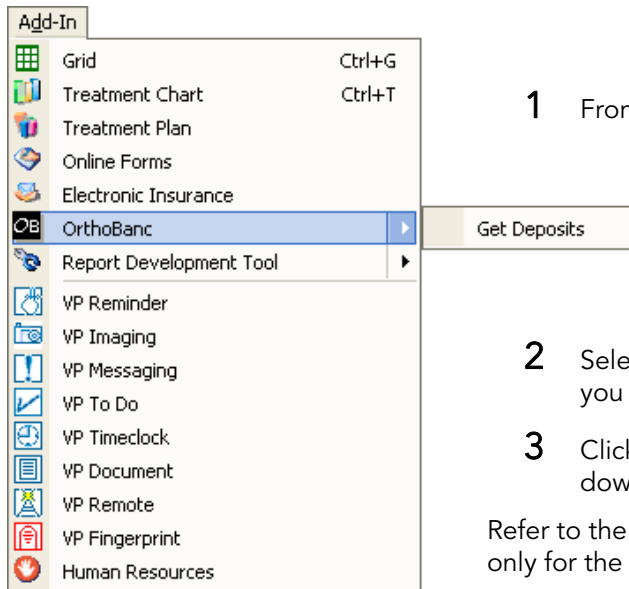
Patient: Megan Joiner
 Responsible Party: Mr. Mrs. Jack Joiner
 Contract Class: OrthoBanc (dropdown)
 Provider ID #: <providerID> (dropdown)
 Social Security #: 444-22-3333
 Start Date: MM/DD/YYYY 07/18/2007 (calendar icon)
 Primary Payment Method: (dropdown)
 Primary Account #: _____
 Primary Exp. Date: MM/YYYY _____
 Primary Routing #: _____
 Name On Account: _____
 ----- Optional Secondary Payment -----
 Secondary Payment Method: (dropdown)
 Secondary Account #: _____
 Secondary Exp. Date: MM/YYYY _____
 Secondary Routing #: _____
 Name On Account: _____
 Buttons: Submit, Cancel

The Payment Plan can be printed out, signed, and faxed back to OrthoBanc to finalize the contract. The patient is not considered "active" at OrthoBanc until this plan is received.

If you notice an error in the plan before it is signed and returned, correct the contract in ViewPoint, but do not resubmit. Log into the OrthoBanc website, make the corrections there, and print the corrected Recurring Progress Payment Plan from there. You will need to manually add the corrected plan to the patient's correspondence history.

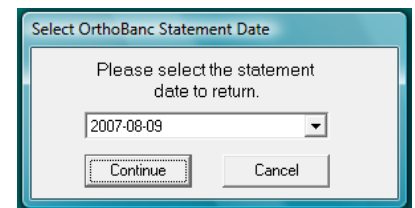
If you notice an error in the plan after it is signed and returned, log into the OrthoBanc website, and fill out a request for a change.

Get Deposits



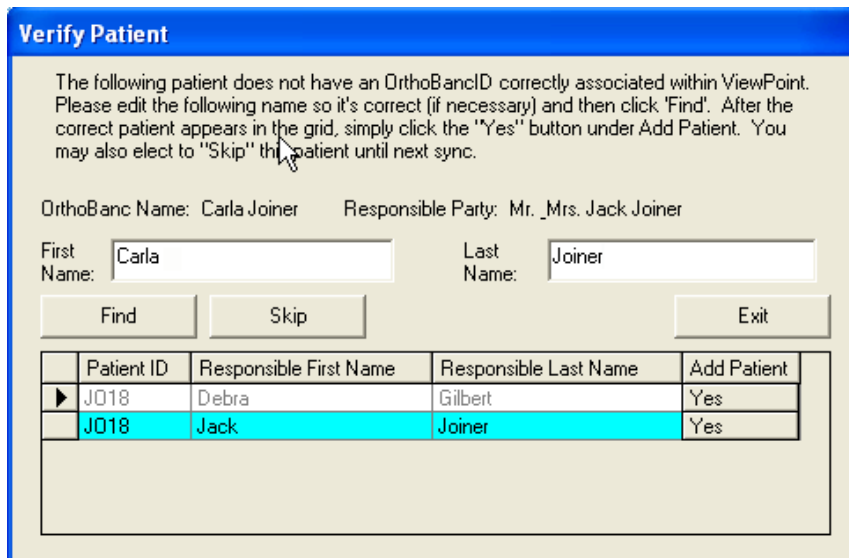
1 From the **Add-In** menu, select **OrthoBanc** and then **Get Deposits**.

2 Select the OrthoBanc statement date you wish to download.



3 Click [**Continue**], and the deposit information from OrthoBanc will be downloaded and posted to patient's ledgers.

Refer to the deposit schedule provided by OrthoBanc and download deposits only for the appropriate days.



If there is a payment from a patient who has not yet been linked between ViewPoint and OrthoBanc, the *Verify Patient* screen will allow you to locate the patient's record in ViewPoint.

Determine the appropriate patient ID and responsible party name combination and click [**Yes**] on that line.

Get Recommendations

If you are using OrthoBanc's optional Get Recommendation service, the additional button on the patient's Contract tab will read "OrthoBanc Options" instead of "Submit to OrthoBanc."

Billing Name	Subscriber	Phase	Tx Fee	Allocated	Balance	Amt. Due	P	AR
Mr. & Mrs. Jack Joiner		Full Tx	\$3,500.00	\$3,500.00	\$3,500.00	\$0.00		

Amount Due Aging	
Tx. Start Date	7/29/2007
From 0 - 30	\$0.00
From 31 - 60	\$0.00
From 61 - 90	\$0.00
Over 90	\$0.00
TOTAL AMOUNT DUE	\$0.00
Days Past Due	0

Click **[OrthoBanc Options]** to access the following choices shown at right.

Click **[Get Recommendation]** and select the appropriate Provider ID. ViewPoint will contact OrthoBanc. A recommendation will be sent back and displayed on the screen. It will also be stored in the patient's correspondence history.

The **[Submit to OrthoBanc]** button is described under "Submit Payment Plans" earlier in this document.

OrthoBanc Options

Please select one of the following

Get Recommendation

Submit To OrthoBanc

Cancel

Reports

OrthoBanc Transactions

This report lists all OrthoBanc transactions for a given date range. From the ViewPoint Main Menu, click **[Practice Reports]** and then **[Financial]**. Double-click **OrthoBanc Transactions**. Enter the appropriate date range or transaction report range.

OrthoBanc Patient List

This report lists all patients who have been linked to OrthoBanc. From the ViewPoint Main Menu, click **[Practice Reports]** and then **[Patient]**. Double-click **OrthoBanc Patient List**.

Contact

OrthoBanc
2146 Chapman Rd.
Chattanooga, TN 37421
marketing@orthobanc.com
www.orthobanc.com
(888) 758-0585

ViewPoint
Ortho2
1107 Buckeye Avenue
Ames, IA 50010
www.ortho2.com
(800) 346-4504 or (515) 233-1026