

Help Articles

What does our office need to do to activate and use the Patient Portal?



What does our office need to do to activate and use the Patient Portal?

**Now, Responsible Parties can access their account information online!
Check Balance – Pay on Account – Review Upcoming Appointments**

Ensure you have these setup items handled so your Responsible Parties have access to the Patient Portal

Credit Card Processing Account

- Active TransFirst or Open Edge credit card processing account (if the office desires to offer online credit card payments)

Setup / Office is Completed

- TransFirst or Open Edge credit card processing account established directly with the credit card processing company. Credentials should be obtained by the merchant and entered by the office at Setup / Offices / Office Setup / Integration Tab

Responsible Party/Billing Information Records are Completed

- "Send Statements" is check-marked
- "Email Statements" is check-marked (if Responsible Party desires to get email notification of statement)
- Valid email address is recorded within the Responsible Party Information screen

Experience This Opportunity Yourself!

- Input an account with YOU as the Responsible Party – ensure your email is recorded in the Responsible Party/Billing Information screen
- Open the Patient Portal website – <http://yourdentistoffice.com>
- Using the Sign Up link, enter the email address (username) recorded in Denticon's Responsible Party/Billing Information screen
- Using the Login link, start using the Patient Portal
- Send Your Responsible Parties to the Patient Portal

BENEFITS of the Patient Portal –

- Pay account balance online
- Email notification of statements ready – save postage!
- Review upcoming appointments
- View charges and payments
- Reduce patient calls because they have account information at their fingertips!

Statement Generation through Reports / Statements

- “Only Paper” means only the accounts that do not have “Email Statements” checked in Responsible Party/Billing Information screen will receive a statement by paper – click the Print Statements button to generate the paper statements to the Adobe screen for printing
- “Only Email” means only the accounts that do have “Email Statements” checked in the Responsible Party/Billing Information screen will receive a statement by email – to generate the email statements to the Patient Portal
- “Email & Paper” means all Responsible Party accounts will receive a paper statements, plus Responsible Party accounts marked for “Email Statements” will also get a statement through the Patient Portal – four steps:
- Remember to click the Update Stmt Dates button last to lock the Responsible Party accounts that received statements