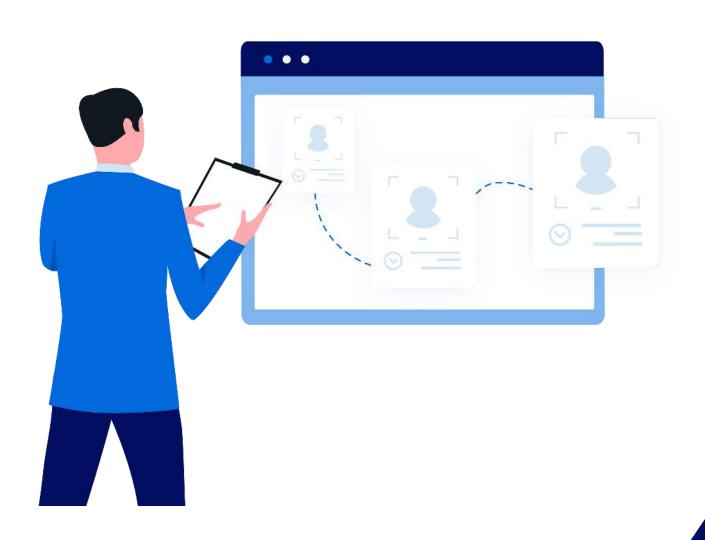
### **Help Articles**

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



| planet denticon

## 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 obtain 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