# DOCTOR
# PORTAL
# GUIDE

edmonds
DENTAL PROSTHETICS
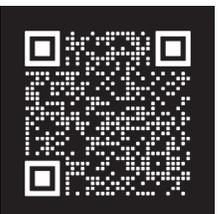
→ EdmondsDentalProsthetics.com

# TABLE OF CONTENTS

## Questions? Give us a call **1.800.462.3569**

**Edmonds Dental Prosthetics**
2065 W Woodland St,
Springfield, MO 65807

**Hours:**
Monday - Thursday: 8 am-5 pm
**Friday . Saturday . Sunday**
Closed

# GETTING STARTED

Edmonds Doctor Portal is a secure, HIPPA-compliant web portal for you to manage cases, upload images, view and print invoices and statements, and pay your bill.

To use the portal, you will need a username and password. If you have not already received a temporary password, you must first visit edmondsdentalprosthetics.com to do so. Please follow the steps below.

**SIGNING UP**

**1.** Go to edmondsdentalprosthetics.com
**2.** Click **LOGIN/PAY BILL** in the navigation bar at the top of your screen (see image below)
**3.** Click on the blue **REQUEST ACCOUNT** button (see image below)
**4.** Click **START NOW** on the Portal Account Request (see images below)
**5.** Enter your answers to the questions in each field *All questions must be answered in order to move forward
**6.** Click **SUBMIT**

You will receive a pop up message that we will be in touch. We will then send an email with a temporary Username (your email) and password.
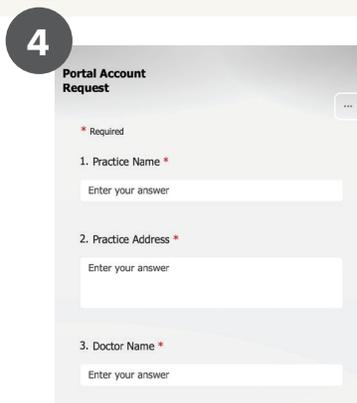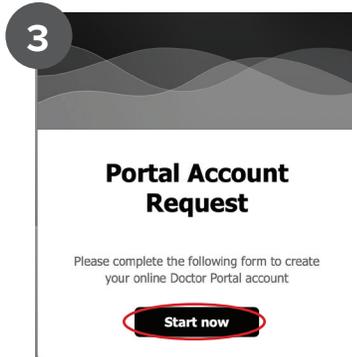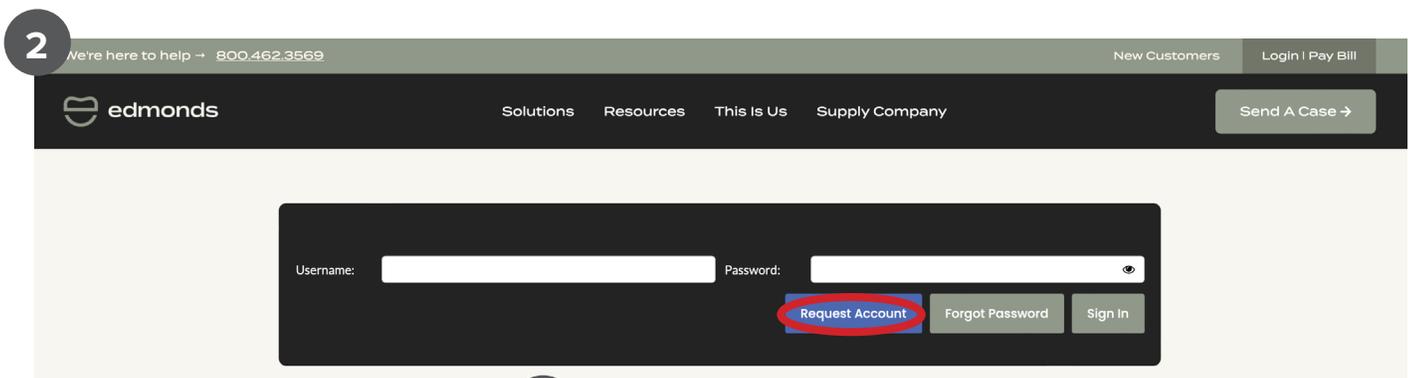
## LOGGING IN FOR THE FIRST TIME

**1.** Go to edmondsdentalprosthetics.com

**2.** Find the **DENTIST** dropdown menu in the navigation bar at the top of your screen

**3.** Select **LOGIN**

**4.** Enter the Username (your email) and temporary Password that you received in our email

**5.** Click **SIGN IN**

## CHANGE YOUR TEMPORARY PASSWORD TO A PERSONAL PASSWORD

**1.** To change your password, click on **CHANGE PASSWORD**.

| Cases | Pickups | Billing | User Setup | | | |
|---|---|---|---|---|---|---|

*Tommy Smith*
Sign Out | Change Password

Atlanta Based Systems Inc.

### Manage Cases

Create New Lab Rx   Create New Case

Date Range

07/28/2024   to   01/28/2025

Last Name(Leave empty to exclude)

Search Cases

Filter by case status  All

Show 10 entries                                    Search:

| Patient ▲ | Doctor ⬍ | Order ⬍ | Status ⬍ | Carrier ⬍ | Tracking Number ⬍ |
|---|---|---|---|---|---|
| **case, test** | Smith, Tommy | 01/17/25 | Accepted ☐ Shipped ☐ Invoiced | Local Delivery | |
| **Inthebox, Jack** | Smith, Tommy | 01/28/25 | Accepted ☐ Shipped ☐ Invoiced | Local Delivery | |
| **Reames, Bob** | Smith, Tommy | 01/27/25 | Accepted ☐ Shipped ☐ Invoiced | Local Delivery | |
| | | | Accepted | Local | |

| Cases | Pickups | Billing | User Setup |
|---|---|---|---|

*Tommy Smith*
Sign Out | Change Password

### *Change Password*

Save

Old Password:

New Password

Confirm Password:

The Password must have 8 to 16 characters and must have at least one letter, one special character and one number.

**Valid Characters:**
123456789
!@#$%^*()=
abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ

**SORTING**

When you login to the Doctor Portal, you will be taken to the **CASES** tab. Cases are automatically sorted by patient last name. You can sort by Patient, Order Date, or Status by clicking on the arrow in the sort field.

Using the **CASES** tab, you are able to:
• View case status
• Search case history
• View the case invoice
• Upload files/images to a case
• Track a UPS case sent from the lab

## VIEW CASE STATUS

You can view case status from the **CASES** tab. Case statuses are:
- **Accepted:** The case has been input and is awaiting arrival of the physical case in the lab
- **Scheduled:** The physical case has arrived in the lab and has been matched to the proper information
- **In Process:** The case is in production in the lab
- **Hold:** The case is awaiting action i.e., new impressions, try-in
- **Completed:** The case has been completed in the lab. Once the case has been shipped and invoiced, the shipped and invoiced boxes will be checked in the status field

**1.** To view more detailed information about a case, click on the **Patient Name.**



**2.** Once you click on the name, you will see more detailed information.
• **Case Number:** This is a unique, auto-generated number that is given to each case in the lab
• **Case Type:** This can be either New, Remake, Invoice. The Case Type will read Invoice when an office has ordered supplies
• **Order Date:** This is the date the case was checked in at the lab or was entered in to Web Service.
• **Case Status:** This indicates where the case is in the manufacturing process
• **Ship Date:** This is an auto-generated date. It is the date the case is scheduled to leave the lab
• **Case Pan Number:** This is an internal tracking number for the lab
• **Delivery Date:** This is the date the case is scheduled to be delivered to your office.
• **Case Carrier:** This is the delivery route to which your office is assigned
• **Tracking Number:** If your case was sent from Edmonds via UPS, you will see your tracking number here once the case is shipped. You can click on the tracking number to track the case.

## SEARCH CASE HISTORY

When using the case history search function, you can search by date, patient name, or case status.

**1.** To search by date, enter the date range in to the **DATE RANGE** fields. Click **SEARCH CASES**

**2.** To search by patient name, enter all or part of the patient last name in the **LAST NAME** field
   Click **SEARCH CASES**

**3.** You may also filter by **CASE STATUS**

## VIEW BASIC INVOICE

**1.** Click on the patient name of the invoice you would like to view



**2.** Click on the **INVOICES** tab

**3.** To print the page, click the **PRINT PAGE** tab. If you would like a more detailed invoice, see the **BILLING** section.

| Cases | Pickups | Billing | User Setup | | *Tommy Smith* Sign Out \| Change Password |
|---|---|---|---|---|---|

Atlanta Based Systems Inc.

## Manage Cases

Create New Lab Rx   Create New Case

Date Range

| 07/28/2024 | to | 01/28/2025 |

Last Name(Leave empty to exclude)

Search Cases

**2025-26**                                                Back to Search

**Jack Inthebox**

Serviced by: Tommy Smith

| Info | Invoices | File | Notes | Cancel | Remake | Print Page |
|---|---|---|---|---|---|---|

| Case Type | Order Date | Case Status | Ship Date | Case Pan Number | Delivery Date | Case Carrier | Tracking Number |
|---|---|---|---|---|---|---|---|
| New | 01/28/25 | Accepted | | | 03/04/25 | Local Delivery | |

**Services**

| Description | Metal | Units | Tooth List |
|---|---|---|---|
| Porcelain Fused to Semi Precious | Semi Precious | 3 | 30, 31, 32 |

## UPLOAD FILES/IMAGES TO A CASE

**1.** Click on the patient name of the case you would like to add pictures to.

| Cases | Pickups | Billing | User Setup | | *Tommy Smith* Sign Out \| Change Password |
|---|---|---|---|---|---|

Atlanta Based Systems Inc.

## Manage Cases

Create New Lab Rx   Create New Case

Date Range

| 07/28/2024 | to | 01/28/2025 |

Last Name(Leave empty to exclude)

Search Cases

Filter by case status [ All ▼ ]

Show [ 10 ▼ ] entries                                    Search: [        ]

| Patient | Doctor | Order | Status | Carrier | Tracking Number |
|---|---|---|---|---|---|
| case, test | Smith, Tommy | 01/17/25 | Accepted ☐ Shipped ☐ Invoiced | Local Delivery | |
| Inthebox, Jack | Smith, Tommy | 01/28/25 | Accepted ☐ Shipped ☐ Invoiced | Local Delivery | |
| Reames, Bob | Smith, Tommy | 01/27/25 | Accepted ☐ Shipped ☐ Invoiced | Local Delivery | |
| | | | Accepted | Local | |

**2.** Click the **FILE** tab



**3.** Click the **ADD FILES** button or drag the files to the white file area.

**4.** Locate the file on your computer. Click **OPEN**.



**5.** Click **START UPLOAD**.
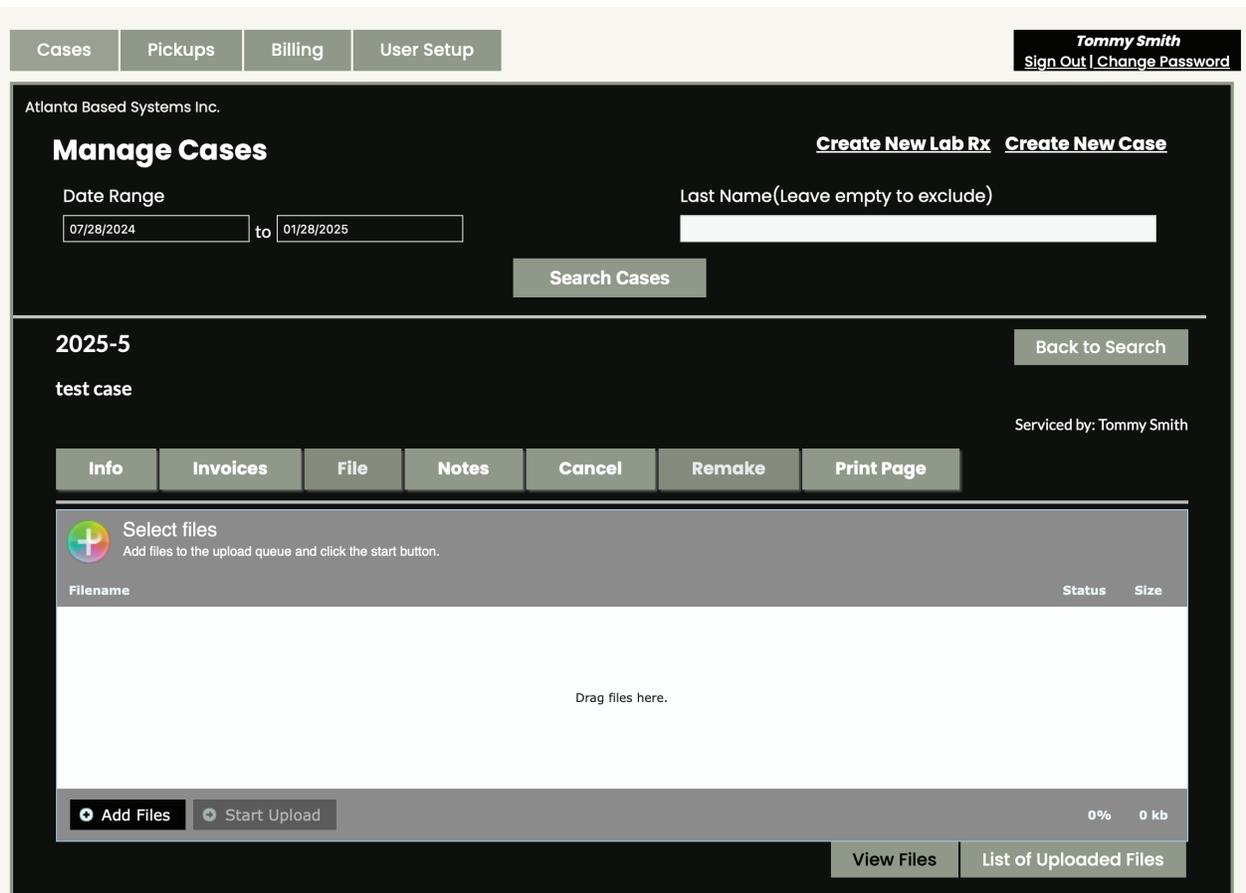
**6.** Once the file is uploaded, the status will read 100% and a check mark will appear at the far right-hand side.

| Cases | Pickups | Billing | User Setup | | | | **Tommy Smith**<br>Sign Out \| Change Password |

Atlanta Based Systems Inc.

## Manage Cases

Create New Lab Rx   Create New Case

Date Range

| 07/28/2024 | to | 01/28/2025 |

Last Name(Leave empty to exclude)

Search Cases

**2025-5**

Back to Search

**test case**

Serviced by: Tommy Smith

| Info | Invoices | File | Notes | Cancel | Remake | Print Page |

Select files
Add files to the upload queue and click the start button.

| Filename | | Status | Size | |
|---|---|---|---|---|
| Invoice INV-2110.pdf | | 100% | 94 KB | ✓ |

| Add Files | Start Upload | | 100% | 94 KB |

View Files   List of Uploaded Files

# BILLING

To access billing, login to your account and click on the **BILLING** tab. From this tab you will be able to view your account balance, view and download invoices and statements and make a payment.



## VIEW ACCOUNT BALANCE

**1.** When you click on the **BILLING** tab, you will automatically be taken to the **ACCOUNT BALANCE** screen. This screen shows the total invoices and payments month to date as well as the total balance on the account.

## VIEW DETAILED INVOICES

**1.** To view and download invoices, click on **VIEW INVOICES**.



**2.** Invoices are searchable by date, patient name, case number and invoice status. To search by Date, input your start date and end date and click **SEARCH**. To view, print or download a specific invoice, click on the **PDF SYMBOL** next the invoice you wish to view. A new window will open with your invoice.

## VIEW STATEMENTS

**1.** To view and download invoices, click on **VIEW STATEMENTS**.
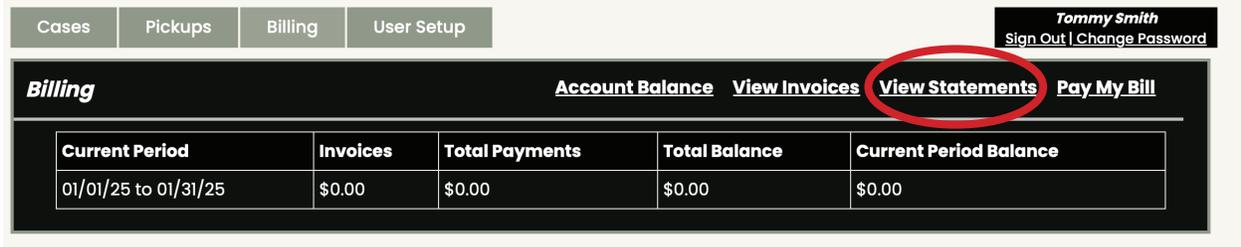
| Cases | Pickups | Billing | User Setup | | | Tommy Smith Sign Out \| Change Password |
|---|---|---|---|---|---|---|

**Billing**     Account Balance    View Invoices    **View Statements**    Pay My Bill

| Current Period | Invoices | Total Payments | Total Balance | Current Period Balance |
|---|---|---|---|---|
| 01/01/25 to 01/31/25 | $0.00 | $0.00 | $0.00 | $0.00 |

**2.** Statements are arranged by date, newest to oldest. To view, print or download a statement, click on the **PDF SYMBOL** next the statement you wish to view. A new window will open with your statement.
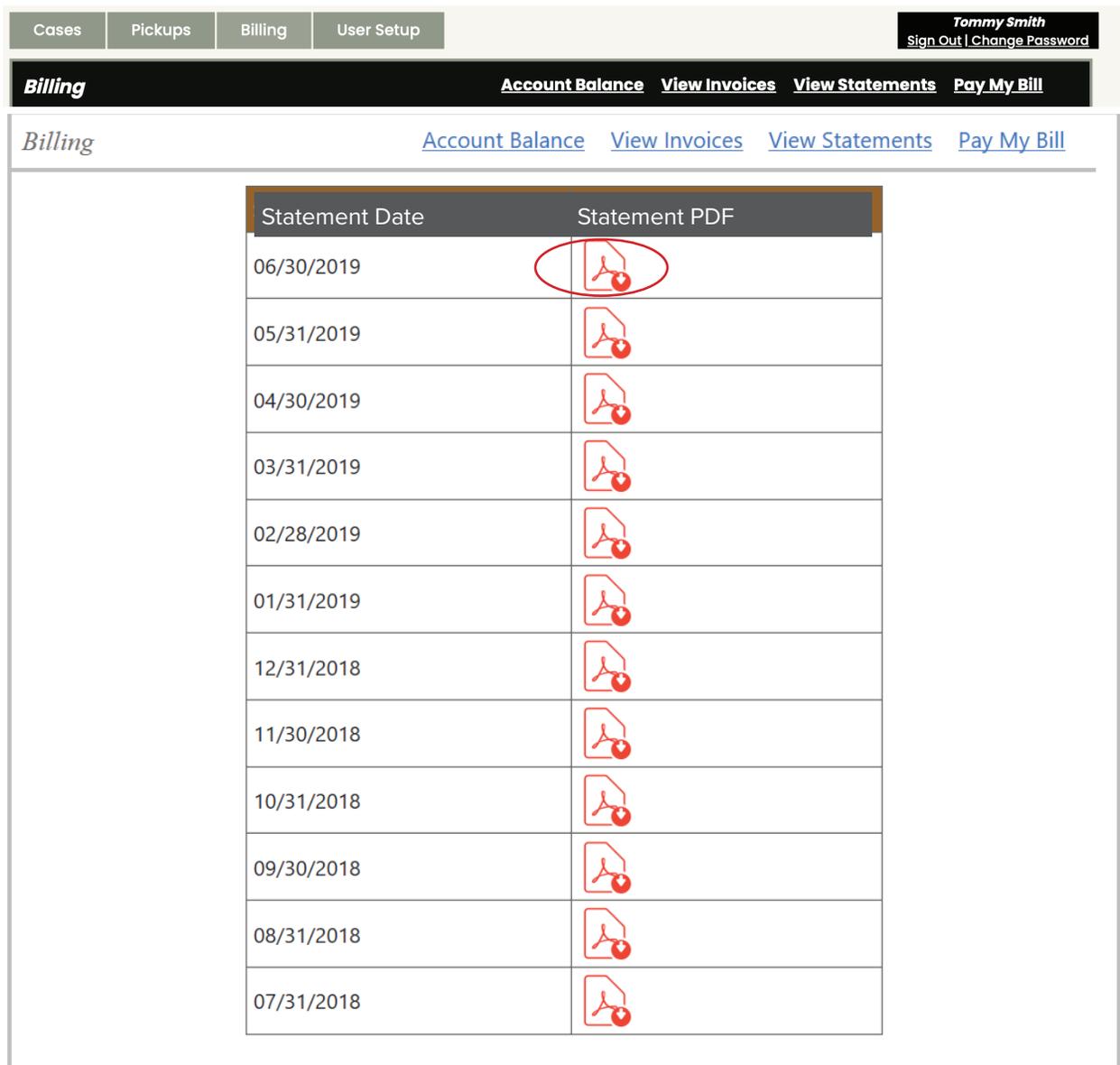
| Cases | Pickups | Billing | User Setup | | | Tommy Smith Sign Out \| Change Password |
|---|---|---|---|---|---|---|

**Billing**     Account Balance    View Invoices    **View Statements**    Pay My Bill

*Billing*     Account Balance    View Invoices    View Statements    Pay My Bill

| Statement Date | Statement PDF |
|---|---|
| 06/30/2019 | 📄 |
| 05/31/2019 | 📄 |
| 04/30/2019 | 📄 |
| 03/31/2019 | 📄 |
| 02/28/2019 | 📄 |
| 01/31/2019 | 📄 |
| 12/31/2018 | 📄 |
| 11/30/2018 | 📄 |
| 10/31/2018 | 📄 |
| 09/30/2018 | 📄 |
| 08/31/2018 | 📄 |
| 07/31/2018 | 📄 |

| CARD NUMBER | | EXP. DATE | AMOUNT |
|---|---|---|---|
| CARD TYPE | | SECURITY CODE | |
| CARD HOLDER NAME (Please Print) | | SIGNATURE | |
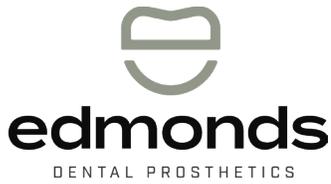
**CUSTOMER NAME**

Dr. John Smith

| DATE | TOTAL DUE |
|---|---|
| 07/31/2023 | $2,021.00 |

Account #:  20616

AMOUNT PAID

ALL PAYMENTS WILL BE APPLIED TO THE
OLDEST UNPAID INVOICES UNLESS
OTHERWISE NOTED.

Detach and return with payment.

Edmonds Dental Prosthetics, Inc.
2005 West Woodland
Springfield, MO 65807
Phone: 417-881-8572
Toll Free: 800-462-3569

| CUSTOMER NAME | DATE |
|---|---|
| Dr. John Smith | 07/31/2023 |

Account #:  20616

| DATE | INV/PMT NUMBER | CASE NUMBER | PATIENT | INV AMT | AMT PAID | BAL DUE |
|---|---|---|---|---|---|---|
| | | | Last Statement Balance ⟶ | | | $2,007.05 |
| 07/06/2023 | 2023-34455 | 2023-31981 | Patient Name | $213.60 | | $2,220.65 |
| 07/06/2023 | 2023-34327 | 2023-32987 | Patient Name | $0.00 | | $2,220.65 |
| 07/07/2023 | 2023-34705 | 2023-32884 | Patient Name | $150.00 | | $2,370.65 |
| 07/07/2023 | 2023-34541 | 2023-33798 | Patient Name | $412.00 | | $2,782.65 |
| 07/11/2023 | 2023-35056 | 2023-32885 | Patient Name | $213.60 | | $2,996.25 |
| 07/12/2023 | 2023-35264 | 2023-33401 | Patient Name | $0.00 | | $2,996.25 |
| 07/24/2023 | 2023-37081 | 2023-34524 | Patient Name | $507.00 | | $3,503.25 |
| 07/24/2023 | 2023-36999 | 2023-34847 | Patient Name | $194.40 | | $3,697.65 |
| 07/24/2023 | 2023-36997 | 2023-34851 | Patient Name | $194.40 | | $3,892.05 |
| 07/26/2023 | Visa/Mastercard 8564311237 | | | | $2,007.05 | $1,885.00 |
| 07/28/2023 | 2023-38088 | 2023-37398 | Patient Name | $136.00 | | $2,021.00 |

| $2,021.00 | $0.00 | $0.00 | $0.00 | Discounts: | |
|---|---|---|---|---|---|
| Current – 30 days | 31 - 60 days | 61 - 90 days | 91+ days | Total: | $2,021.00 |

INTEREST OF 1 1/2% PER MONTH WILL BE CHARGED ON ALL  PAST DUE BALANCES     THANK YOU FOR YOUR BUSINESS
THE CLOSING DATE IS ON THE LAST BUSINESS DAY OF EACH MONTH

## MAKE A PAYMENT

**1.** 1. To make a payment on your account, click **PAY MY BILL**.

| Cases | Pickups | Billing | User Setup | | | | *Tommy Smith* Sign Out \| Change Password |
|---|---|---|---|---|---|---|---|

**Billing**      Account Balance   View Invoices   View Statements   **Pay My Bill**

| Current Period | Invoices | Total Payments | Total Balance | Current Period Balance |
|---|---|---|---|---|
| 01/01/25 to 01/31/25 | $0.00 | $0.00 | $0.00 | $0.00 |

**2.** You have the option to pay your balance in full, pay by selected invoice, pay your statement balance or pay a specific amount. Select the option you would like and click **CONTINUE**.



**3.** If you have a credit card on file with us, you can choose **EXISTING CARD** and select the card from the pull down menu and click **SUBMIT**.

**4.** If you do not have a credit card on file with us, or wish to use another card, select **NEW CARD**. Fill out the information and click **SUBMIT**. If you wish to save the new card to your account, click **SAVE CREDIT CARD**.



**5.** After you click **SUBMIT**, you will receive an email with a receipt for payment.

# USER SET-UP

To access User Set Up, login to your account and click on the User Setup tab. From this tab you can add, deactivate, and manage the users for the Web Service. Only Admin Users are able to access this tab.



**ADD NEW USER**

**1.** There are two types of users for the Doctor Portal: Admin User and Standard User. The Admin User can add other users and has access to all areas of Web Service. The Admin User can also dictate the level of access granted to Standard Users. To add a Standard User, click **ADD NEW USER**.

**2.** Fill out User Information. Each user must have their own email address. Their email address will serve as their Username. You will also assign the user their password on this screen. Once the user has logged in for the first time, they may change their password.



**3.** Fill out Functions Allowed For This User. Click the boxes of the areas you would like the user to be able to access. If there are multiple doctors associated with one account, select the doctor for which the user will be managing cases. If there is only one doctor associated with the account will default to the doctor's name or practice name. Once complete, click Save.

**4.** To add an Admin User, click Add Admin User. Admin Users will have access to all areas of the online portal. Fill out User Information. Each user must have their own email address. Their email address will serve as their Username. You will also assign the user their password on this screen. Once the user has logged in for the first time, they may change their password. Once complete, click **SAVE**.



## DEACTIVATE A USER

**1.** To deactivate a user, select the user you would like to deactivate from the Existing Users menu.

**2.** Uncheck the Account Status box so that the status reads Inactive. Once complete, click **SAVE**.



## CHANGE PASSWORD
**1.** To change your password, click on Change Password.



**2.** Enter your old password, enter your newly created password and confirm your new password under confirm password. Once complete, click **SAVE**.

## SET EMAIL PREFERENCES

**1.** To change email notification preference, click on **SET EMAIL PREFERENCES.**



**2.** Select the account you for which you wish to change email notification preferences.



**3.** Select your practice location.

**3.** Select the users you would like to receive email confirmation for each email. Once completed, click **SAVE.**

| Cases | Pickups | Billing | User Setup | | | | | ***Tommy Smith*** Sign Out \| Change Password |
|-------|---------|---------|------------|--|--|--|--|--|

**Users: add and manage**         Set Email Preferences     Add Admin User     Add New User     Save

*Users: add and manage*        Set Email Preferences     Add Admin User     Add New User     Save

**Account Name**

House Account ▼

**Email Location**

Primary 2065 W. Woodland Street Springfield, MO 65807 ▼

**Email Options**

**Case: New Case Confirmation**

Email : sjones@dental.com ☐ Selected       Email : [        ] ☑ Selected

Email : jwhite@dental.com ☑ Selected       Email : [        ] ☐ Selected

Email : jalbertson@dental.com ☐ Selected

**Case: New Case Confirmation No Due Date**

Email : sjones@dental.com ☑ Selected       Email : [        ] ☑ Selected

Email : jwhite@dental.com ☑ Selected       Email : [        ] ☐ Selected

Email : jalbertson@dental.com ☐ Selected

**Case: Reschedule Confirmation**

Email : jwhite@dental.com ☐ Selected       Email : [        ] ☑ Selected

Email : jalbertson@dental.com ☑ Selected       Email : [        ] ☐ Selected

Email : [        ] ☐ Selected

**CC Charge: eMail Message**