

Edge Portal Premium Quick Start Guide




Setup

- 1 When you purchase Edge Portal a unique Internet address (URL) will be provided to you. This URL will be the central login point for your office, patients, responsible parties, and professional colleagues.
- 2 Once you have been provided with your custom URL you can login to Edge Portal using the email and password set up in Edge Cloud.

Staff member login: Give staff members access to Edge Portal by entering them as an Operator in Edge Cloud. This can be done in the Editors section. An email address must be provided. Once the email is added, staff can log in and adjust the settings in Edge Portal. (See **Settings** below.)

Use

Settings

This icon,  in the upper right hand corner, is the link to the settings page which allows you to make adjustments that will help personalize your, as well as your clients', Edge Portal experience. There are also payment settings listed that will help with processing payments via Edge Portal.

There are two payment account selections, one for processing individual credit card payments made online and one for processing reoccurring credit card or ACH transactions that are already defined in Edge Cloud. Account integrations set up in Edge Cloud will appear in these lists.

The checkbox for Allow Payment Processing with Saved Payments in File will provide the responsible party with the option to use a saved payment method to make the payment instead of manually entering payment details if they have one. For example, an office could be using XWeb to process their credit cards and Vanco to process ACH transactions. A responsible party who had a Vanco ACH account would have the option of using that saved ACH account to pay even if Vanco was not used in the settings on Edge Portal.

Important Note: Settings should be adjusted before releasing Edge Portal to your clients. A logo must be uploaded otherwise the default logo will be visible to your users. The logo has to be a .PNG format in order to be uploaded.

Home Tab

Once staff members are logged into Edge Portal they will see the home page. The home page provides a quick overview of your Patient Tracker, Appointments by Date, Today's Uncharted Patients, and Today's Past Due accounts.

- **Patient Tracker:** This Widget will allow you to see your Arriving, Seated, and CheckOut Status patients. By clicking on the box of a patient, you will be given processing functionality.
- **Appointments by Date:** This list will provide you with patients with an appointment for the selected day. Click on a column heading to re-sort by that item. Clicking a name will open the patient's folder.

- **Today's Uncharted Patients:** This lists patients who have an appointment but don't have a treatment chart entry yet for that day.
- **Today's Past Due:** This list provides you a quick overview of patients with appointments today that have past due amounts.

Compliance Animations Tab

This provides you with a list of compliance animations. These animations can be played by clicking the thumbnail or link.

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Reports Tab


Select the report you would like and click the Run button at the top of the list. Some reports will require that you enter more information before they can be displayed. Once you enter the information, again click Run and the report will be generated for you.

Schedule Tab

The schedule allows you to view the schedule for any day you choose, past or present.

- **Update/Change Existing Appointments:** By right clicking an appointment in the schedule you are able to open the patient folder, process the appointment, update the Patient Tracker or Cut the appointment. If you wish to move an appointment, right click the appointment, cut it, and right click an empty cell and paste the appointment to reschedule the appointment.
- **Create New Appointment:** Right clicking an empty cell gives you the option to schedule a new appointment. Simply follow the prompts to create a new appointment.

Logout

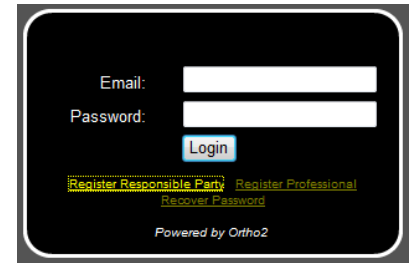
This icon,  at the top right side of the page, will log you out of the Edge Portal and take you back to the login page.

Registering Responsible Parties

Patients, responsible parties, and professionals can log in to Edge Portal by filling out the registration form. Responsible parties will register patients using the link to the form at the bottom of the login screen as seen below. Passwords can be recovered by clicking the Recover Password link seen in the graphic below.

After completing the settings you can provide the URL to others. There are a few ways to make the URL available: Add a link to your website, add a sign-in to register prompt to your sign-in screen, or both.

Responsible parties register themselves and, if they wish, the patient. To be able to register, the responsible party must enter their name, the patient's birthdate, an email address, and phone number.



Using Edge Portal on Mobile Devices

Edge Portal also works on mobile devices!

Edge Portal will detect when it is being used on a mobile device and automatically switch to an interface reformatted for a smaller screen. In most cases this will be preferable. But if you ever wish to see the full Edge Portal user interface on a mobile device, simply click *GO TO FULL SITE* at the bottom of the login page.

Note: iPads and Android tablets will use the full Portal interface because they have larger screens.

Install

To install Edge Portal on your mobile device, enter your unique Edge Portal URL into your Internet browser. You will then want to bookmark the site for future use, and you may also wish to create a shortcut to the bookmark on your mobile device homepage.

Use

To use Edge Portal on your mobile device, simply select the bookmark for the URL. The username and password will be the same as for your full Edge Portal.

Note: With Edge Portal Premium, your patients/parents must first register through full Edge Portal before they will be able to use the mobile version. You may wish to provide appropriate clients with instructions similar to those above to install Edge Portal on their mobile devices.