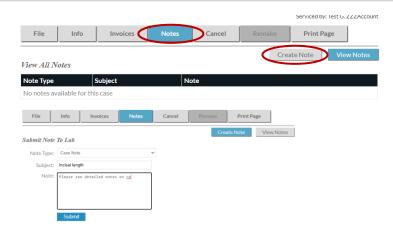## Adding Notes to Your Case

Open the Case,
Click on the Notes Tab, then click Create Note

Choose Note Type and type your Subject
and Note for the lab.
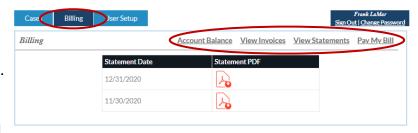
You can go back into the case any time to view
or add additional notes.

Billing Tab

The Billing tab allows you to see your overall
account balance, invoices by case, and
monthly statements by clicking on each option.
You can also pay your bill in this tab.

You can also view invoices by case by clicking
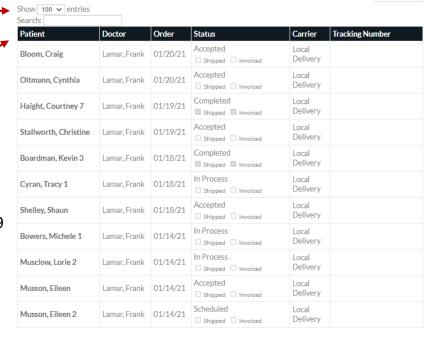on the Invoices tab when you're in a case.

Dashboard Hints

Change the number of entries you see at
one time

Sort the order of your cases by clicking
on the headers – sorting by order date or
patient name.

Filter the list by case status:
Accepted – the lab received the order
Scheduled – the lab has routed the case
In Process – work has begun on the case
On Hold – Contact Hybridge @ 585-319-5399
Completed – case is complete. You cannot
    upload anything.

You will see tracking numbers and carrier info
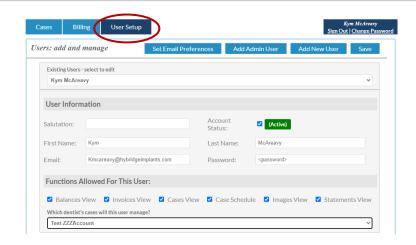when the case has shipped.

User Set-up

Click on User Setup. The email listed here is the one registered for this account. **Please don't change this**. This is also the email address where links for forgotten passwords, etc. will be sent.

In the Set Email Preferences section, you'll be able to designate different emails for notifications or additional logins.
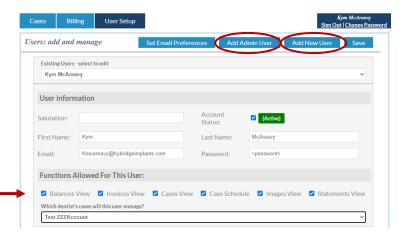

Adding Additional Users

You can designate additional users to receive email updates on case status, invoices, statements, etc.

Click on Add Admin User to add a user who has access to everything.

Click on Add New User to add a user where you select what information they have access to.

Refresh your window before moving on to Setting Email Preferences.

Be sure you're looking at the correct user when editing information.

Set Email Preferences

This section allows you to denote which user emails receive automatic notifications depending on the options selected.

Don't forget to check the "Selected" box to activate these emails.

We recommend that the team managing your schedule receive emails when a case has been rescheduled.

We recommend that you and a team member receive emails when a case has been placed on hold.

We recommend your billing department receive invoice and statement messages.