

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.

Served by: test G. LLLAccount

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

Create Note View Notes

View All Notes

| Note Type | Subject | Note |
|----------------------------------|---------|------|
| No notes available for this case | | |

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

Create Note View Notes

Submit Note To Lab

Note Type: Case Note

Subject: Incisal length

Note: Please see detailed notes on [x1](#)

Submit

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.

Case **Billing** User Setup

Frank LaMar Sign Out | Change Password

Billing Account Balance View Invoices View Statements Pay My Bill

| Statement Date | Statement PDF |
|----------------|---------------------|
| 12/31/2020 | PDF |
| 11/30/2020 | PDF |

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.

Filter by case status: All

Show 100 entries

Search:

| Patient | Doctor | Order | Status | Carrier | Tracking Number |
|-----------------------|--------------|----------|---|----------------|-----------------|
| Bloom, Craig | Lamar, Frank | 01/20/21 | Accepted <input type="checkbox"/> Shipped <input type="checkbox"/> Invoiced | Local Delivery | |
| Oltmann, Cynthia | Lamar, Frank | 01/20/21 | Accepted <input type="checkbox"/> Shipped <input type="checkbox"/> Invoiced | Local Delivery | |
| Haight, Courtney 7 | Lamar, Frank | 01/19/21 | Completed <input checked="" type="checkbox"/> Shipped <input checked="" type="checkbox"/> Invoiced | Local Delivery | |
| Stallworth, Christine | Lamar, Frank | 01/19/21 | Accepted <input type="checkbox"/> Shipped <input type="checkbox"/> Invoiced | Local Delivery | |
| Boardman, Kevin 3 | Lamar, Frank | 01/18/21 | Completed <input checked="" type="checkbox"/> Shipped <input checked="" type="checkbox"/> Invoiced | Local Delivery | |
| Cyran, Tracy 1 | Lamar, Frank | 01/18/21 | In Process <input type="checkbox"/> Shipped <input type="checkbox"/> Invoiced | Local Delivery | |
| Shelley, Shaun | Lamar, Frank | 01/18/21 | Accepted <input type="checkbox"/> Shipped <input type="checkbox"/> Invoiced | Local Delivery | |
| Bowers, Michele 1 | Lamar, Frank | 01/14/21 | In Process <input type="checkbox"/> Shipped <input type="checkbox"/> Invoiced | Local Delivery | |
| Musclow, Lorie 2 | Lamar, Frank | 01/14/21 | In Process <input type="checkbox"/> Shipped <input type="checkbox"/> Invoiced | Local Delivery | |
| Musson, Eileen | Lamar, Frank | 01/14/21 | Accepted <input type="checkbox"/> Shipped <input type="checkbox"/> Invoiced | Local Delivery | |
| Musson, Eileen 2 | Lamar, Frank | 01/14/21 | Scheduled <input type="checkbox"/> Shipped <input type="checkbox"/> Invoiced | Local Delivery | |

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.