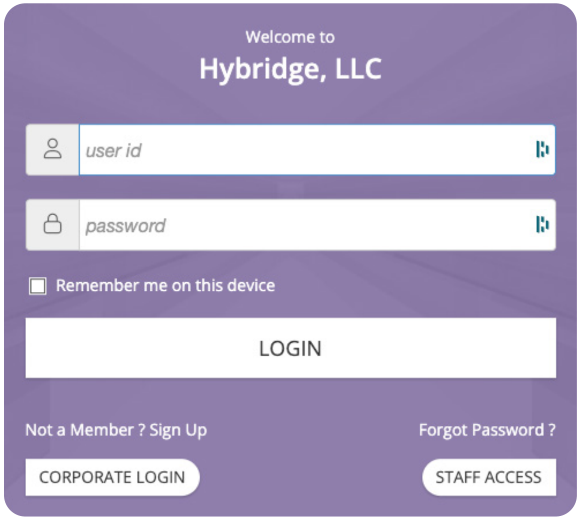
HYBRIDGE®
DENTAL LAB

New Hybridge Portal Instructions

Log-in Screen

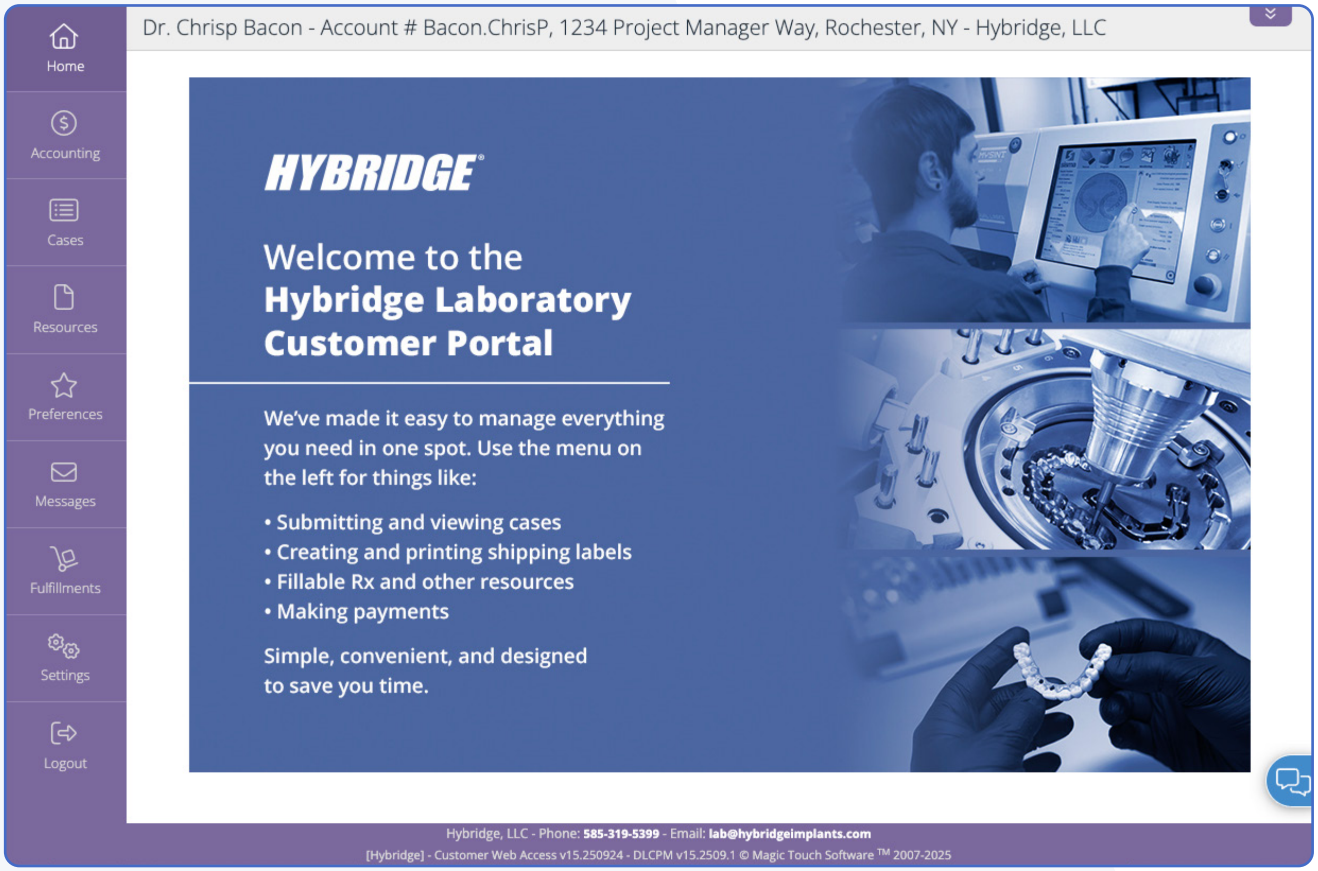
1. Login to **HybridgeRx.com**
2. Enter your user id – an email (same as current portal)
3. Enter a one-time password HybridgeLab (case sensitive)
4. Click "LOGIN"
5. You will automatically be directed to change your password



Use this QR code to access a video walkthrough of the portal

Home

Home Screen



Case Entry

Home

Accounting

Cases

Submit RX

View Design Approval

View Cases

Resources

Preferences

Messages

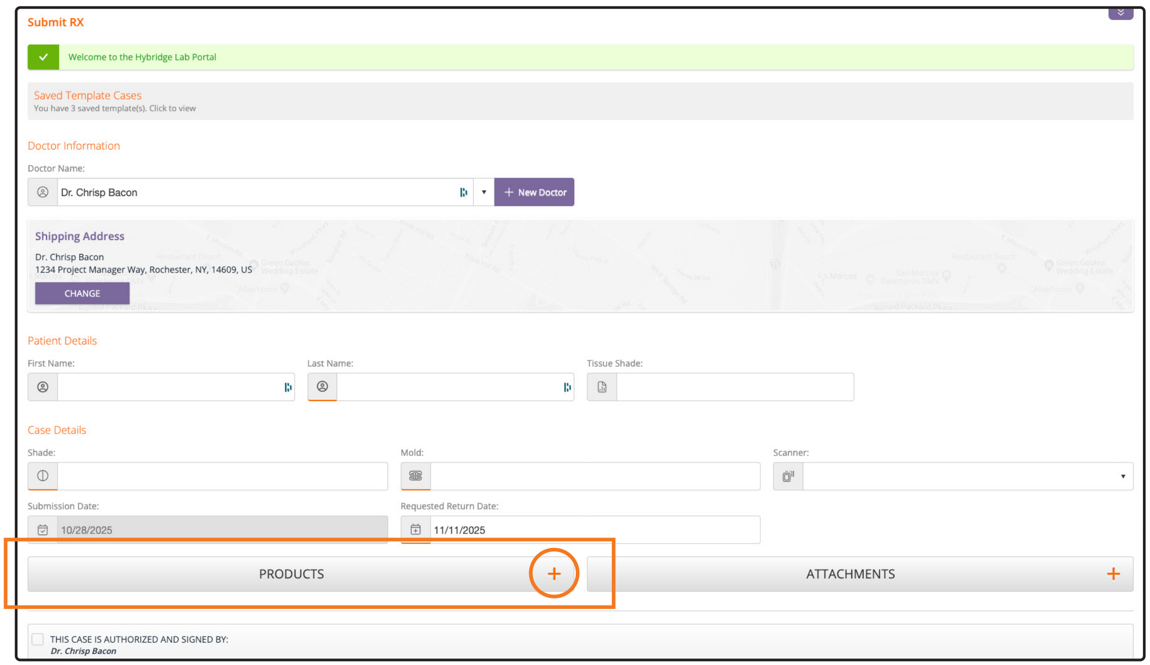
Fulfillments

Settings

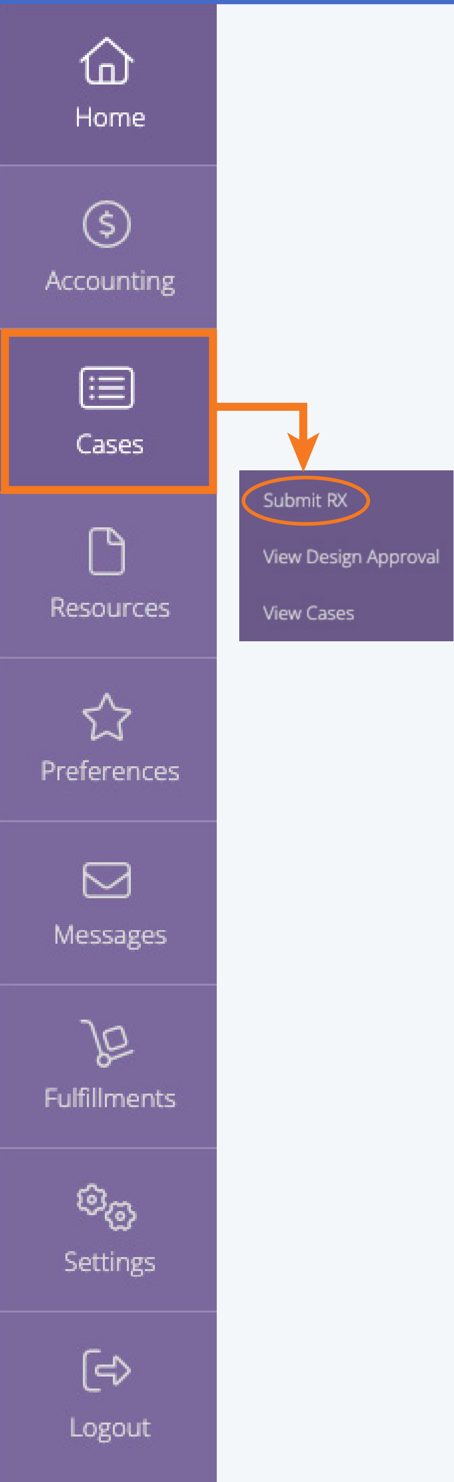
Logout

Submit Rx

- Enter Patient information along with Tooth Shade, Tissue Shade and Mold
- Enter your requested Due Date
- Click on **"Products"**



Case Entry

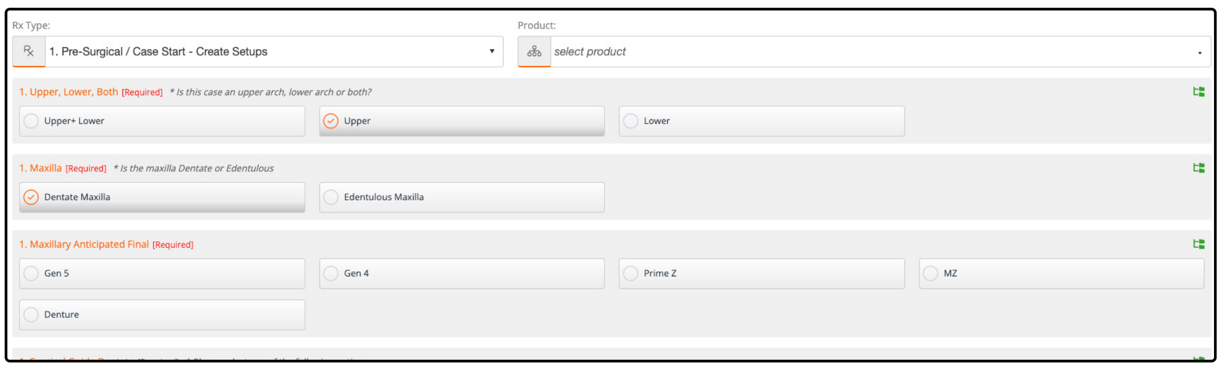


Select Rx

- Select your Rx type and product, then follow the prompts for your next appropriate action.

Select Arch(es) and Anticipated Final

- After making these selections, the next piece of information we need will pop up



Case Entry

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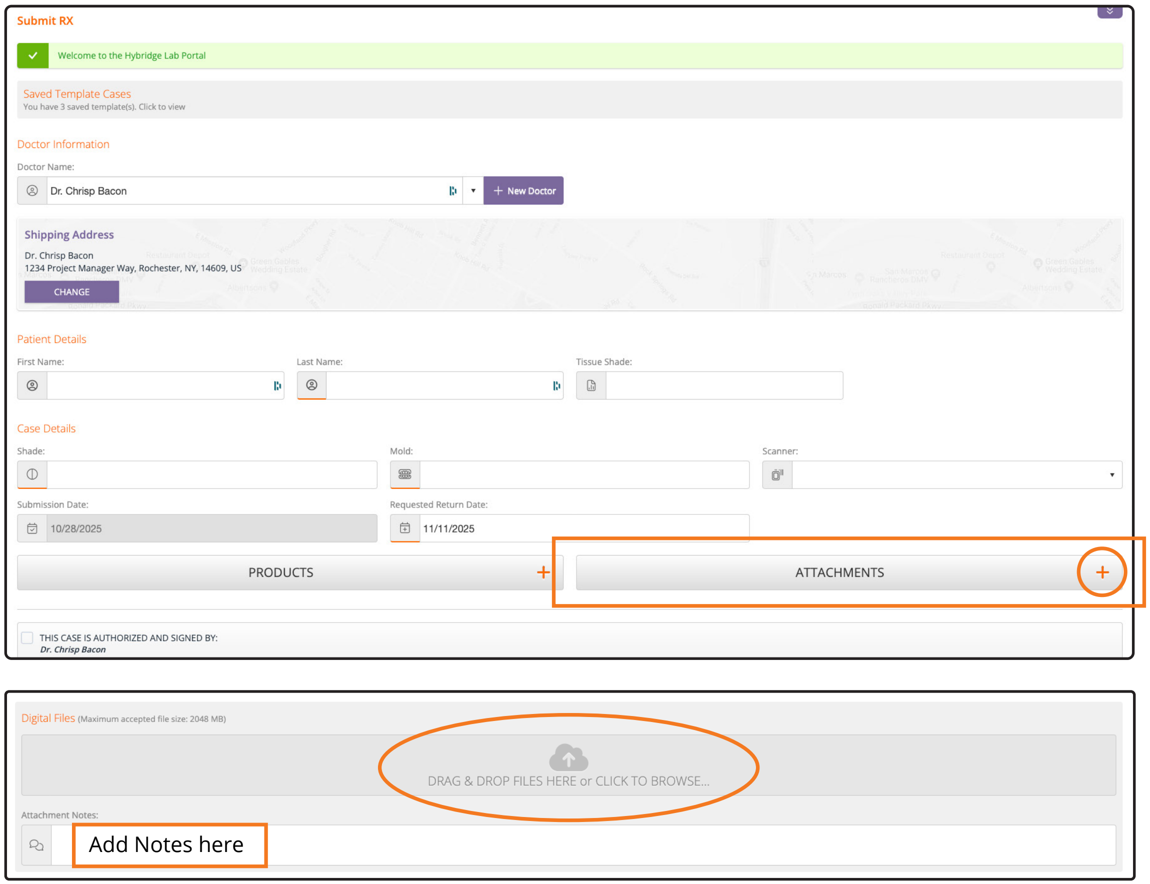
Add Attachments

- Drag and Drop CBCT, STL, JPEG's and PDF files here or click to browse
- If using a paper Rx, attach here
- Add attachment notes, as needed

CBCT and STL files must be zipped!



Case Entry

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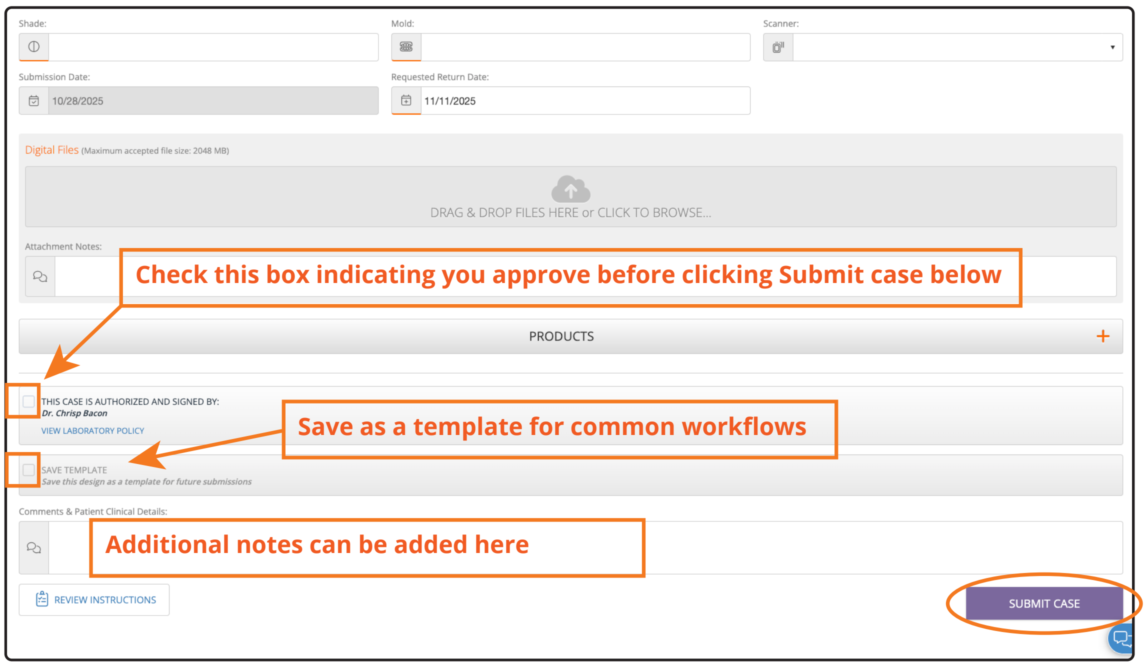
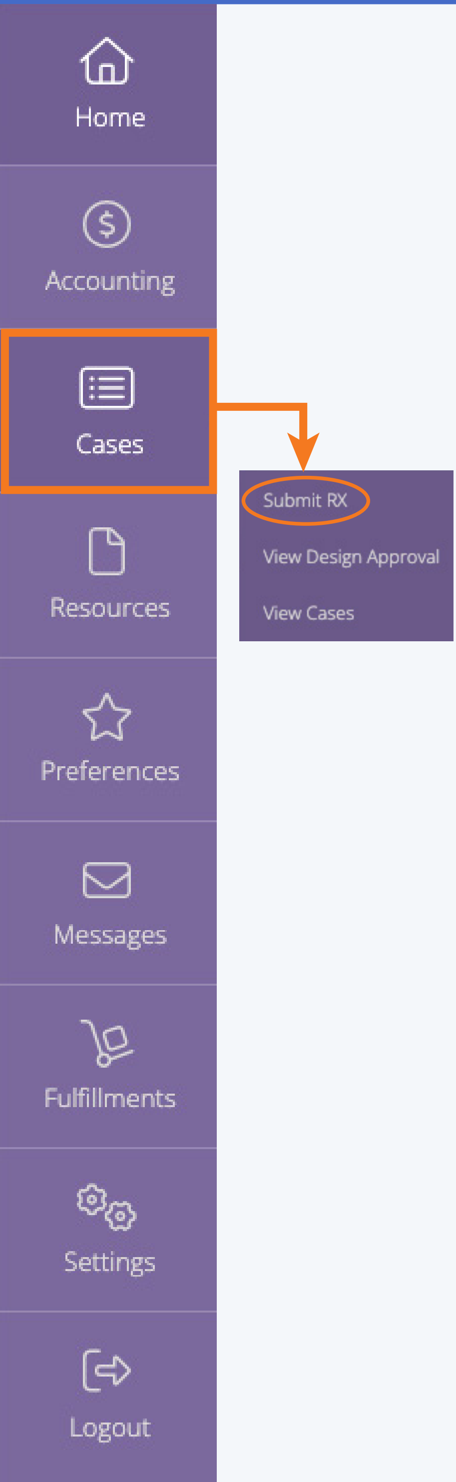
Submit RX
View Design Approval
View Cases

Submit Case

- Add additional notes
- Check the authorization box
- Click on Submit Case



Workflow Templates



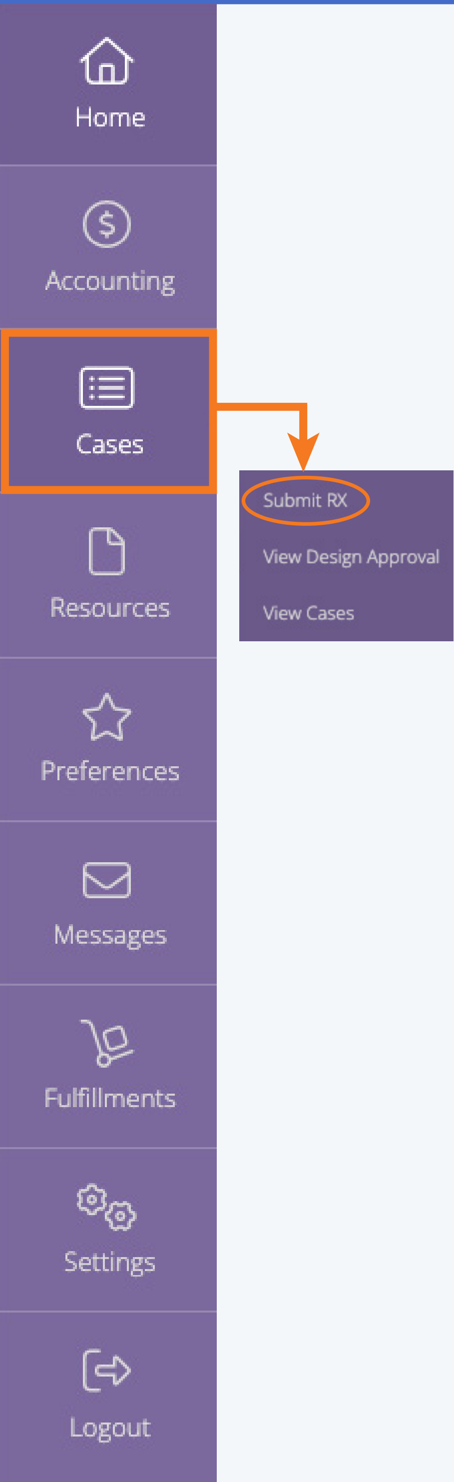
New Feature:

You can now save common workflows as a template!

Saving a Template

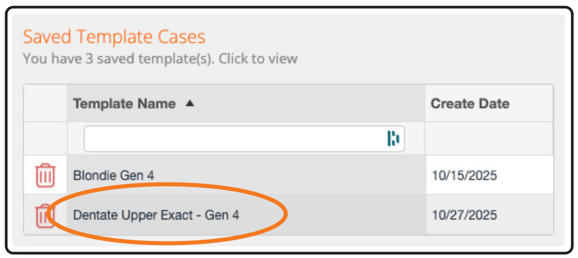
- Go to Cases
- Click on “Submit Rx”
- Enter Patient information, Shade, Mold, Tissue Shade
- Select the product
  - Choose the appropriate options in the popup boxes
  - Hit “Save”
- Before clicking on Submit Case
  - **Check the “Save Template” Box** (bottom left corner)
  - Assign a template name (ie: Pre-Surgical Dentate Start - Upper)

Workflow Templates



Finding a Saved Template

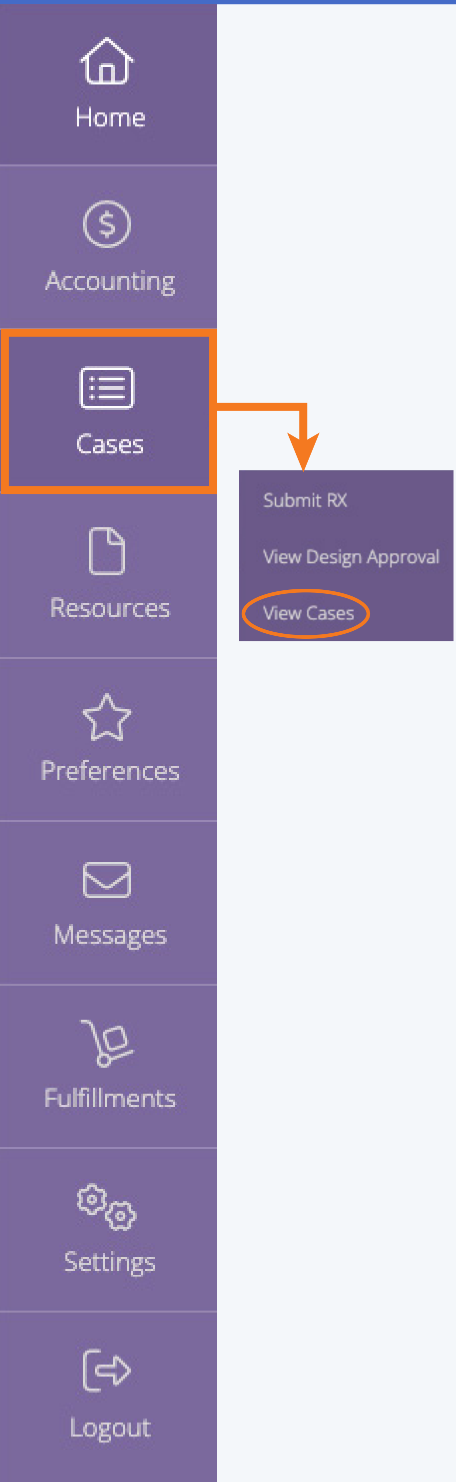
- Go to Cases
- Click on "Submit Rx"
- Select "Saved Template Cases"
  (Top right corner above Doctor Information)

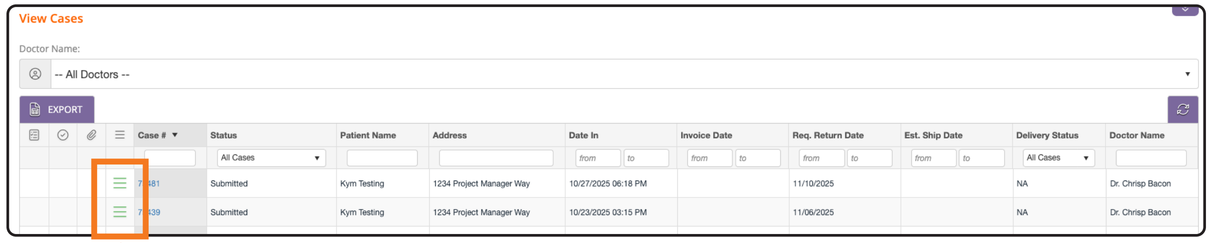


Edit the Product Information

- Enter Patient information
- In Products, click on the **"edit icon"** to make any necessary changes

View Cases





Click on 3 lines for additional options

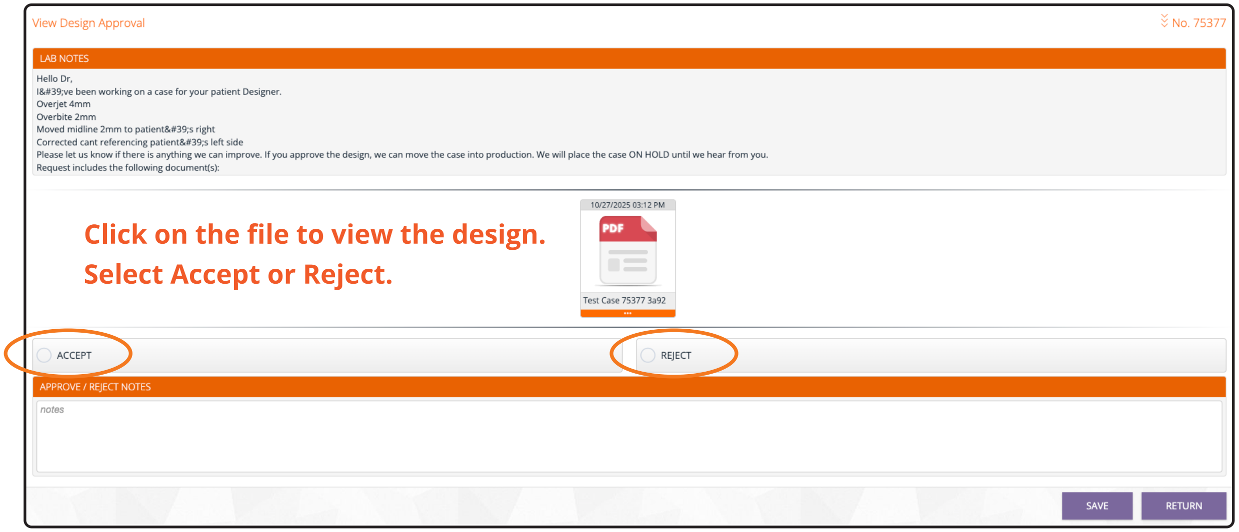
- **Open cases will see:** View Details, Cancel Case, Upload Files, Make Comments, Print Workorder, Case Related Chat
- **Completed cases will see:** View Details, Track Case, Make comments, **Print Invoice**, Case Related Chat

***Print Workorder** – print the details of the submitted case.

View Design Approval

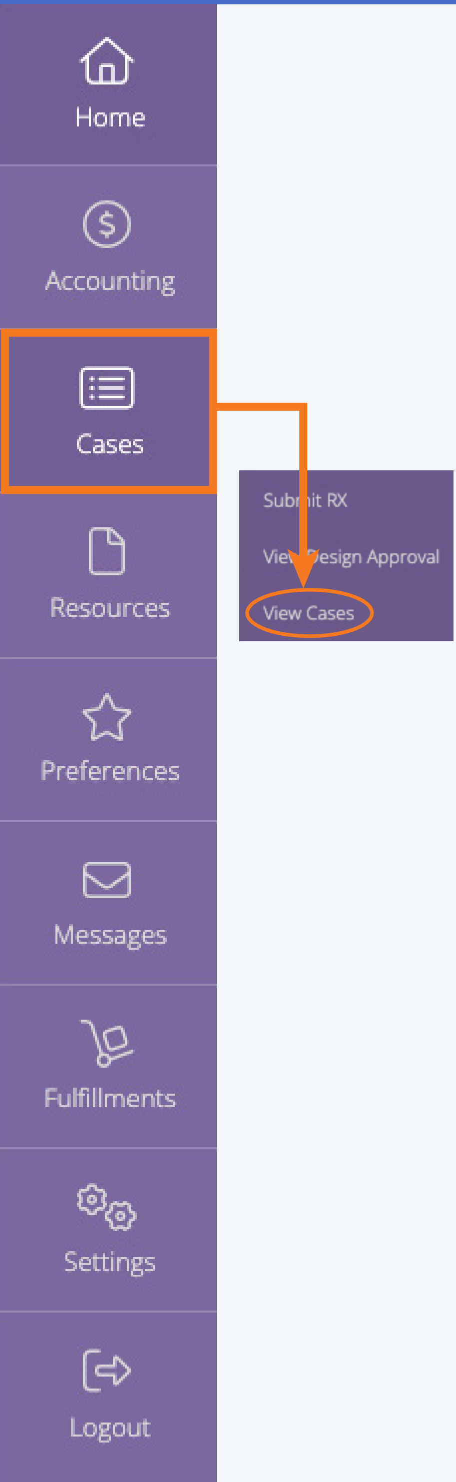
- Home
- Accounting
- Cases
  - Submit RX
  - View Design Approval
  - View Cases
- Resources
- Preferences
- Messages
- Fulfillments
- Settings
- Logout

When you select “Exocad Review” during Case Submission, you will receive an email notification with a link that takes you to your design in the Portal.



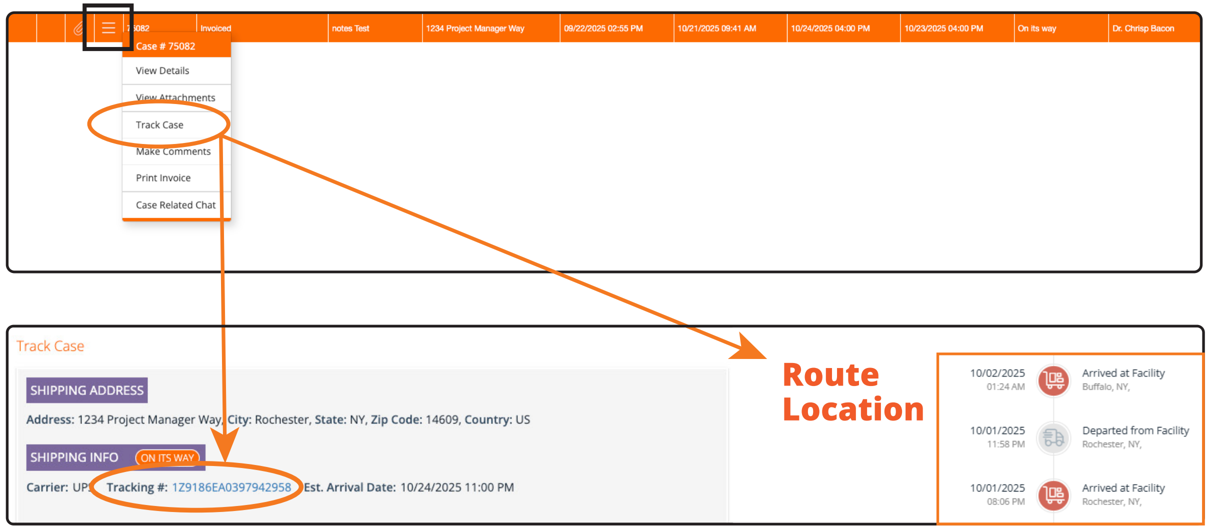
Click on the file to view the design.
Select Accept or Reject.

Track Your Cases



Track shipped cases

- Click on **Cases > View Cases**
- When the Delivery Status is “On its way”, click on the 3 bars
- Select “Track Case” to see the tracking number and Route Location information show below



Print Shipping Labels

- Home
- Accounting
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- Resources
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- Fulfillments
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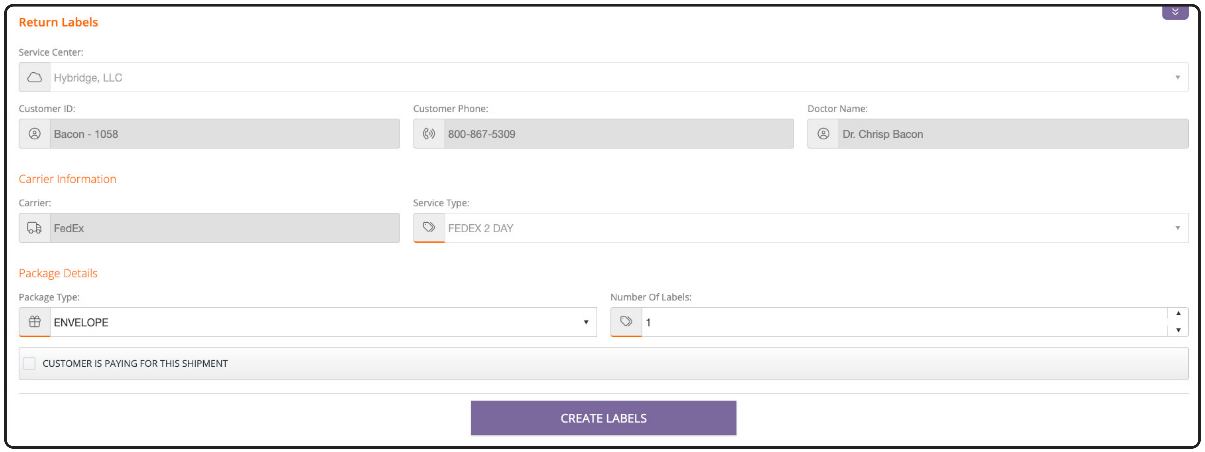
- Logout

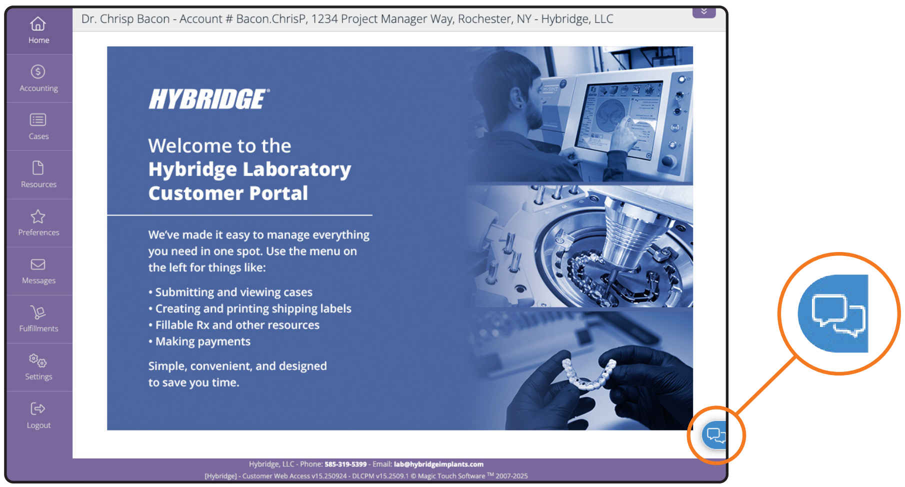
Return Labels

Print return shipping labels in the portal.



New Feature

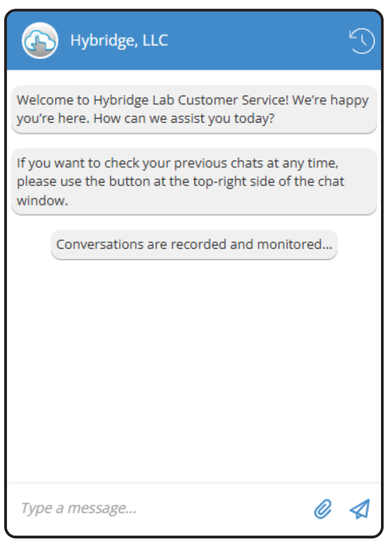
New Chat Feature



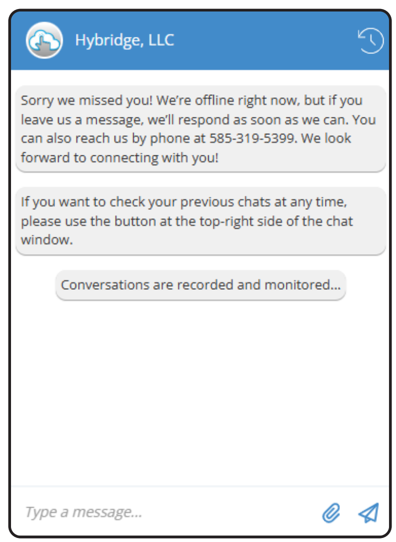
The Hybridge Customer Service team will monitor the chat: Monday – Friday between 8am and 5pm Eastern.

Attachments and Files can be sent through chat!

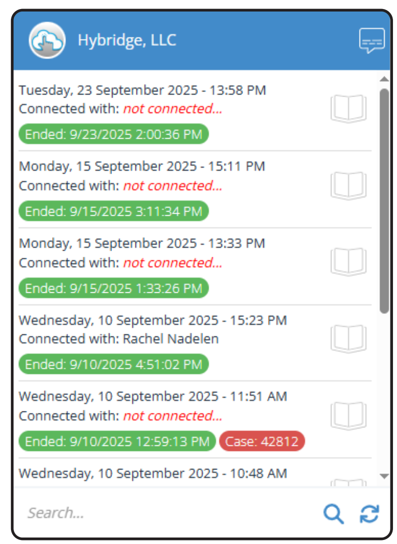
Lab Online Message



Lab Offline Message



Message History



Messages

Home

Accounting

Cases

Resources

Preferences

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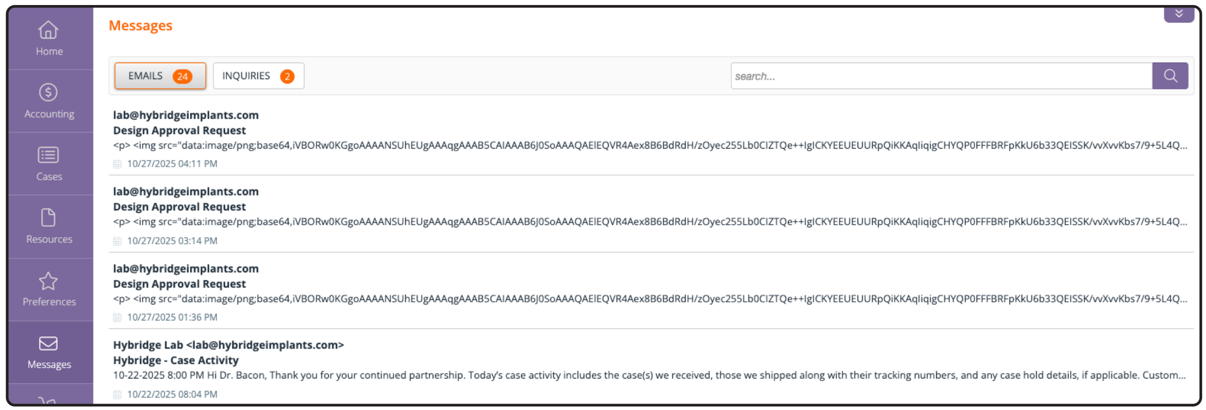
Logout

View Messages

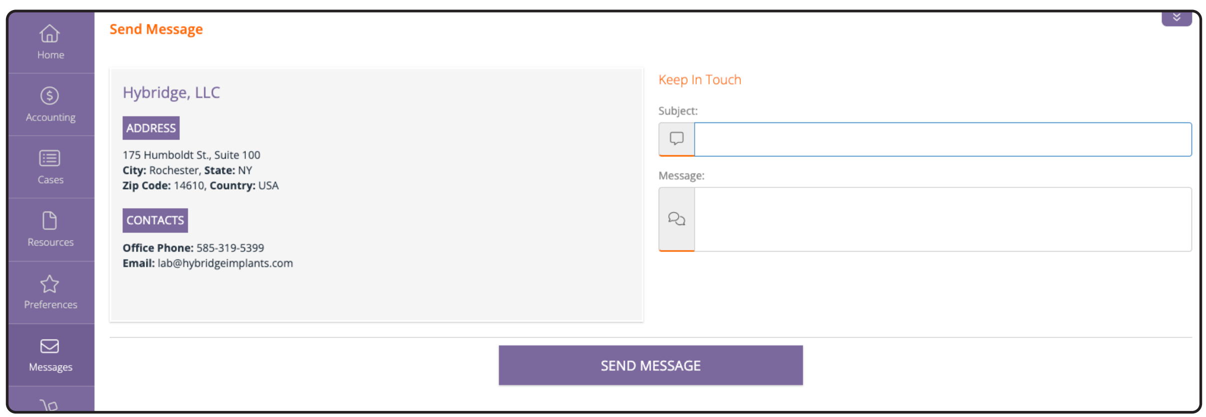
Send Message

View and Send Messages to the Lab

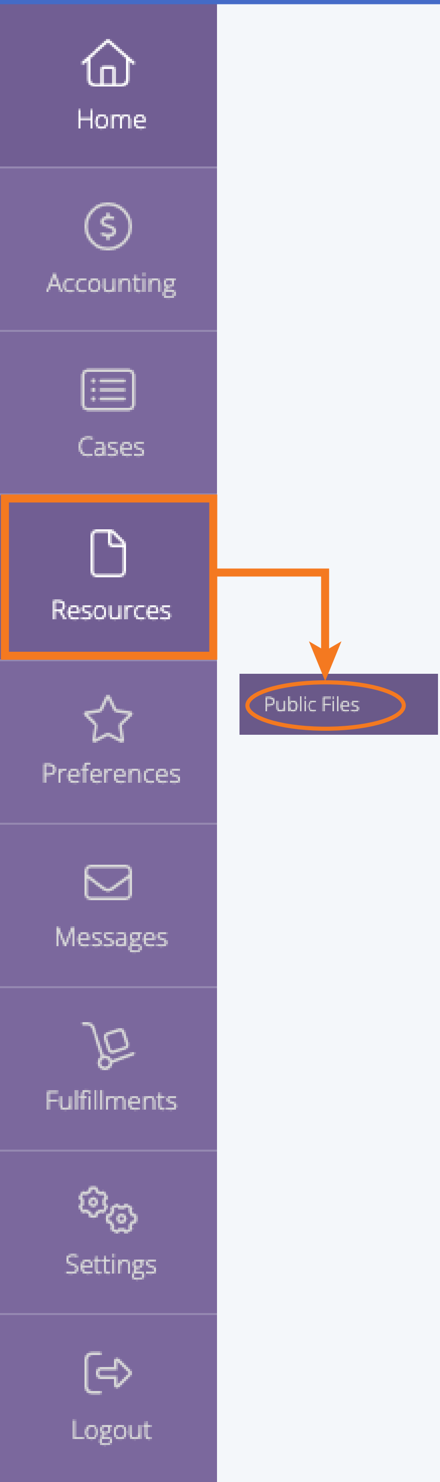
View Messages



Send Messages



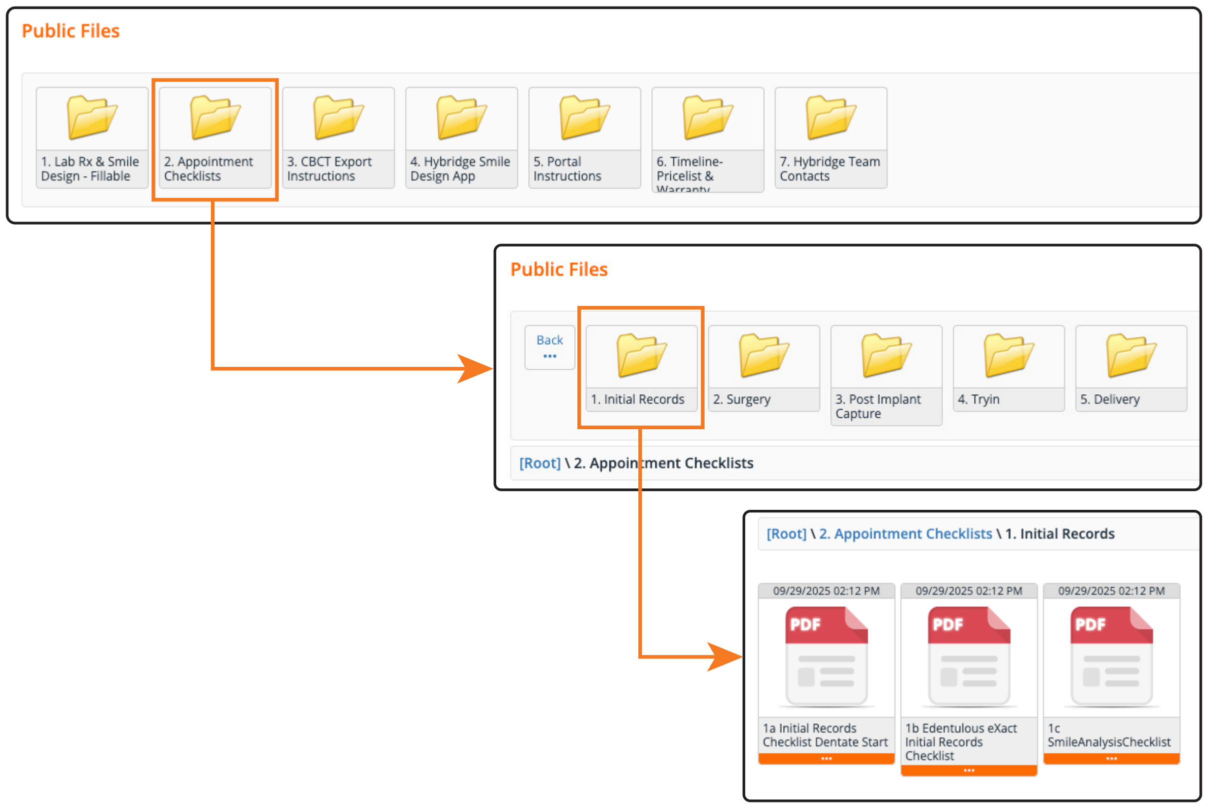
Resources



Find Hybridge resources here!

Checklists, CBCT & STL export instructions and more!

- Click on Resources
- Then "Public Files"



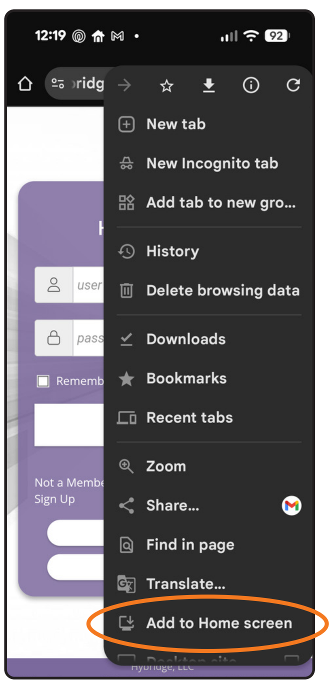
Add Link to Homepage

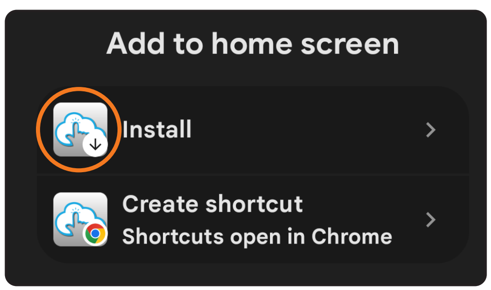
Add the Portal to your Device Homepage!

By adding the web link to the home screen, you no longer need to open the browser, just click and you are in!

Android instructions:

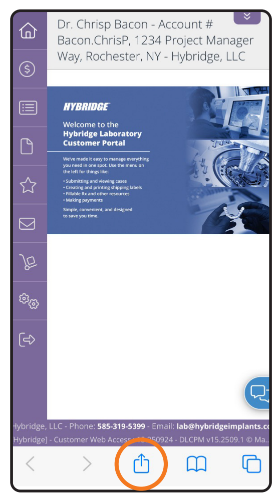
1. **Open** a chrome browser
2. **Search** HybridgeRx.com
3. **Click** on 3 dots in top right corner
4. **Select** “Add to Home Screen”
5. **Install** or create a shortcut
6. **Look** for this icon on your device 

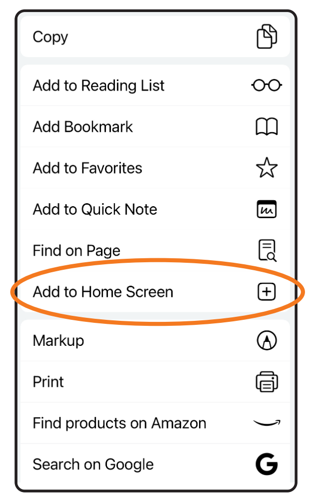


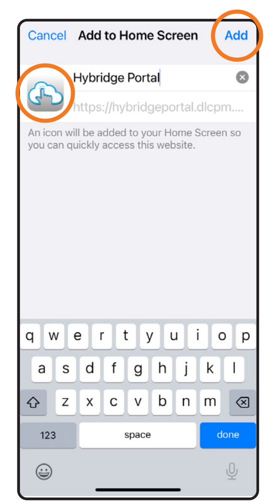


iOS instructions:

1. **Open** Safari (only)
2. **Go** to HybridgeRx.com
3. **Click** on 
4. **Select** “Add to Home Screen”
5. **Type** a label and click “add”
6. **Look** for this icon on your device 







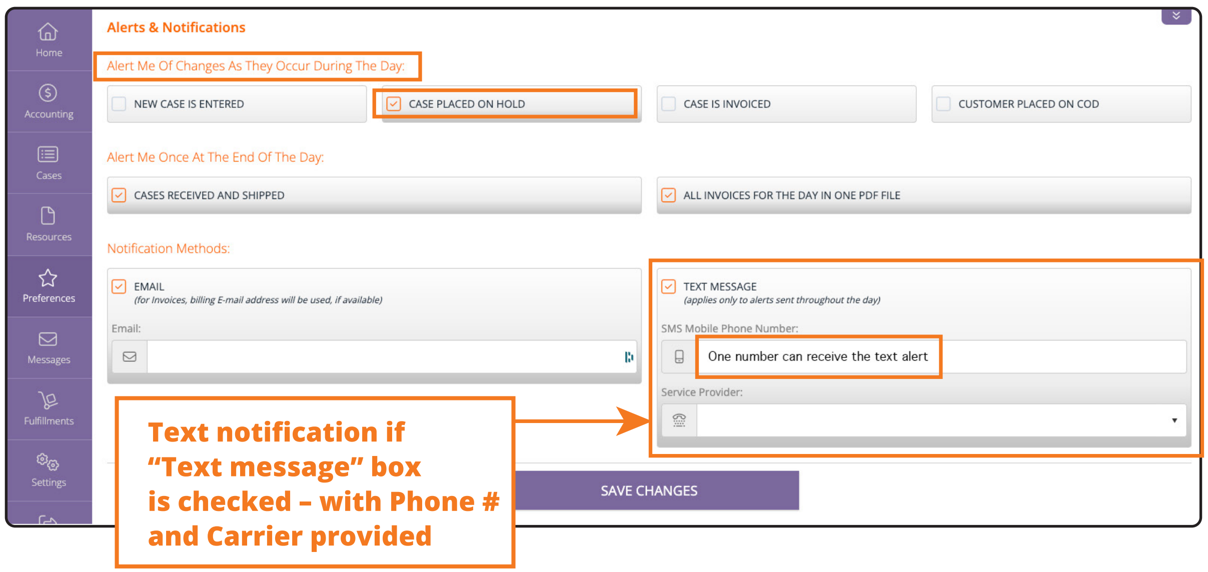
Alerts & Notifications

- Home
- Accounting
- Cases
- Resources
- Preferences
  - Alerts & Notifications
  - Accounting Preferences
- Messages
- Fulfillments
- Settings
- Logout

Alerts as They Occur During the Day

Account Preferences Setup

- Case Hold alerts are sent via text if your carrier and number are provided. Currently AT&T/Cricket are not supporting this.
- If no text information is provided, you will receive an email notification.
- At the end of the day, you will receive an email with your Case Activity that day which includes; Cases Received, Cases Sent and Cases on Hold. An additional email will be sent with the invoice for the Cases sent.



Alerts & Notifications

Home
Accounting
Cases
Resources
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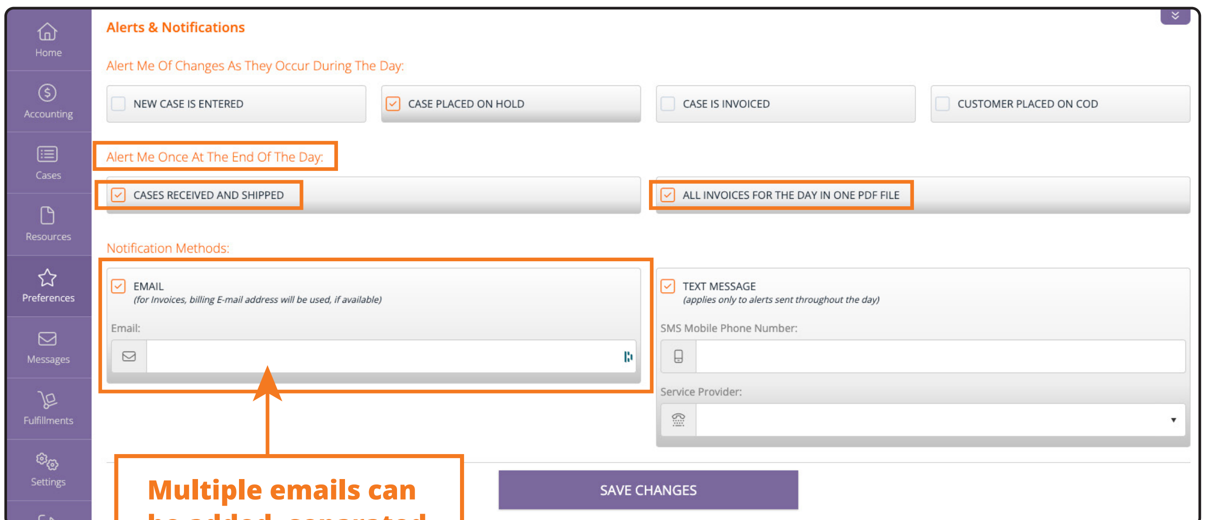
Alerts & Notifications
Accounting Preferences
Messages
Fulfillments
Settings
Logout

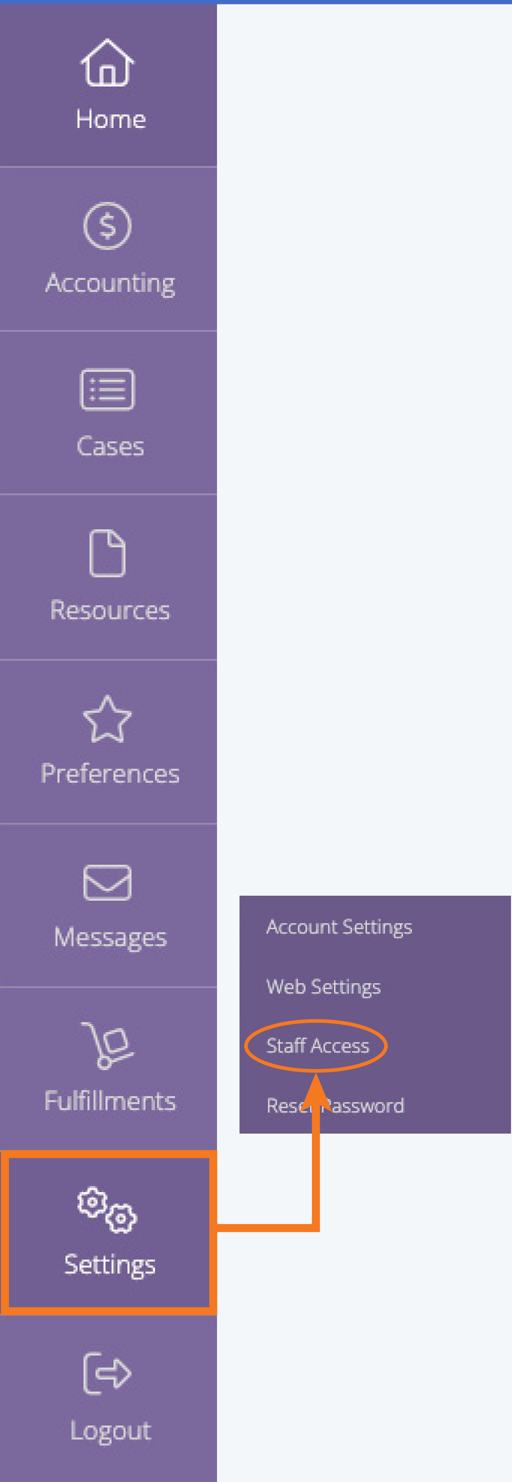
Alerts at the End of the Day

Account Preferences Setup

- Case Hold alerts are sent via text if your carrier and number are provided. Currently AT&T/Cricket are not supporting this.
- If no text information is provided, you will receive an email notification.
- At the end of the day, you will receive an email with your Case Activity that day which includes; Cases Received, Cases Sent and Cases on Hold. An additional email will be sent with the invoice for the Cases sent.



Multiple emails can be added, separated by a comma



Staff Access

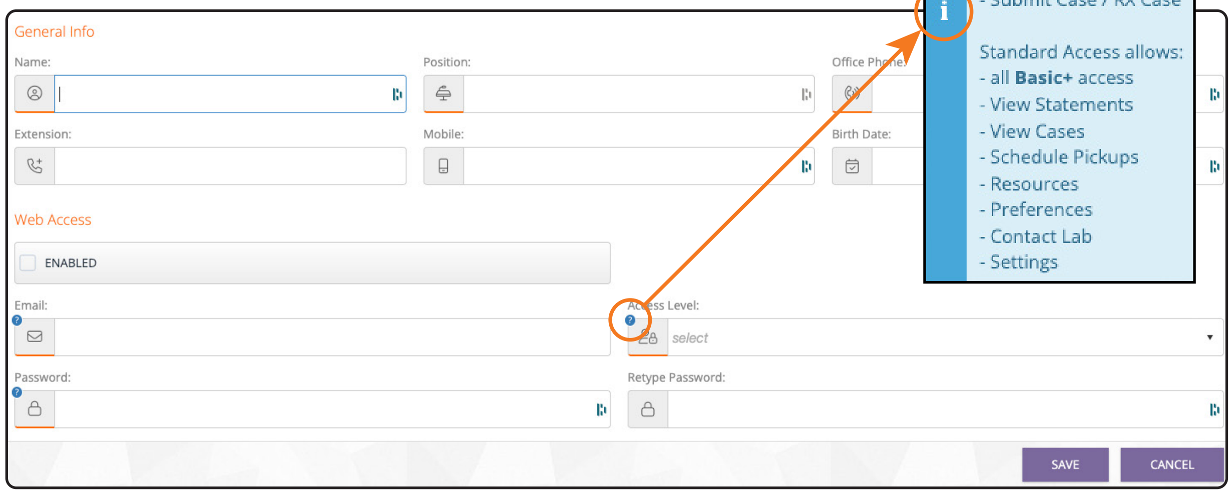
Create Additional Users

- Login to the doctor account
- Go to “Settings” > Staff Access > + New Staff
- Create new user

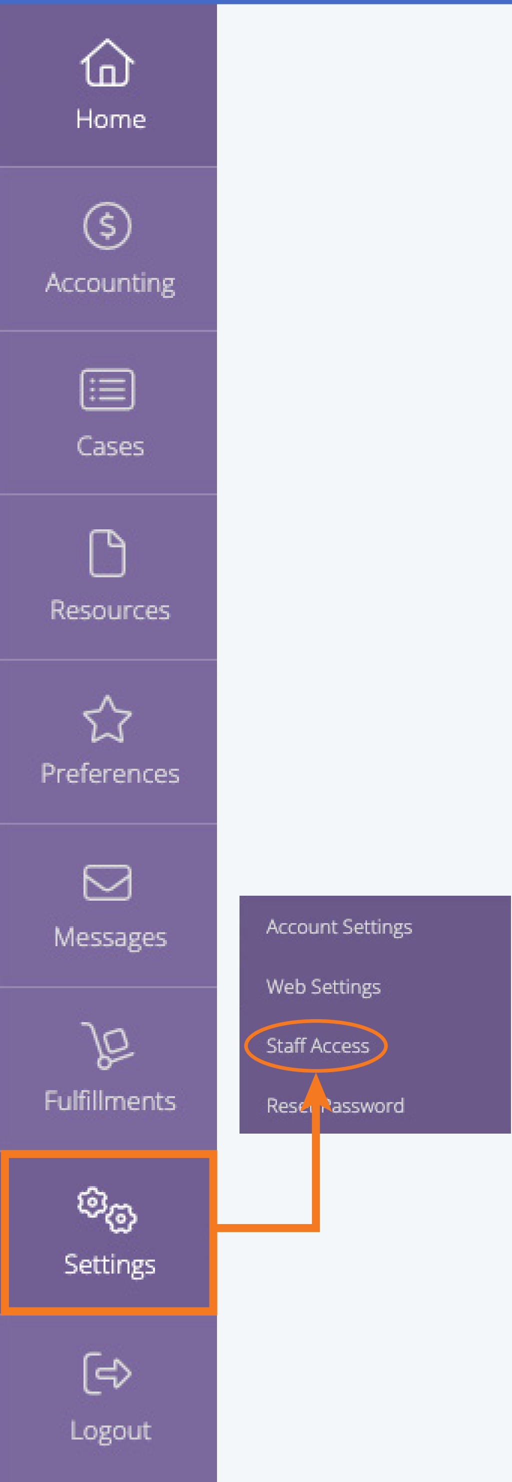
Basic Access allows:
- View Cases
- View Pickups
- Messages
- Web Settings
- Reset Password

Basic+ Access allows:
- all **Basic** access
- Submit Case / RX Case

Standard Access allows:
- all **Basic+** access
- View Statements
- View Cases
- Schedule Pickups
- Resources
- Preferences
- Contact Lab
- Settings



Settings

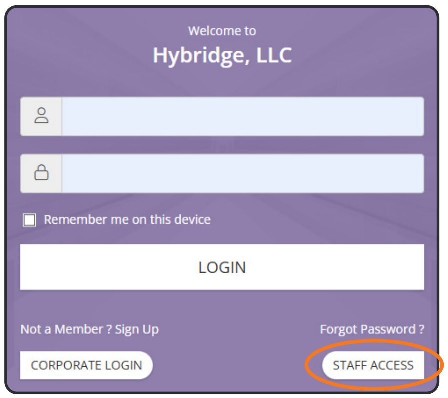


Staff Access

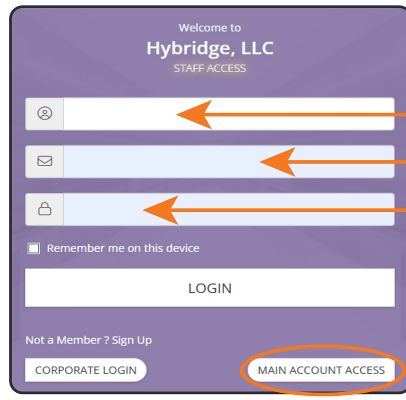
User Login Options

- **Doctor access** – "Main Account Access" – login in with Doctor credentials
- **Staff access** – login using the "Staff Access" and staff credentials

Doctor Login Screen



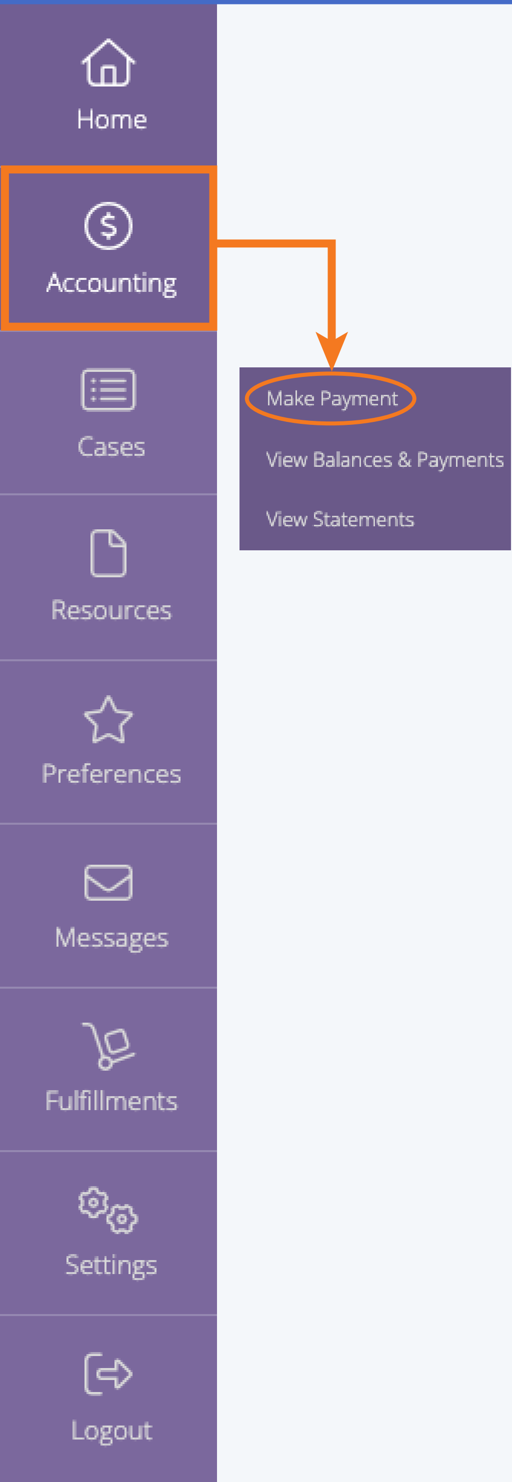
Staff Login Screen



Login Requirements:

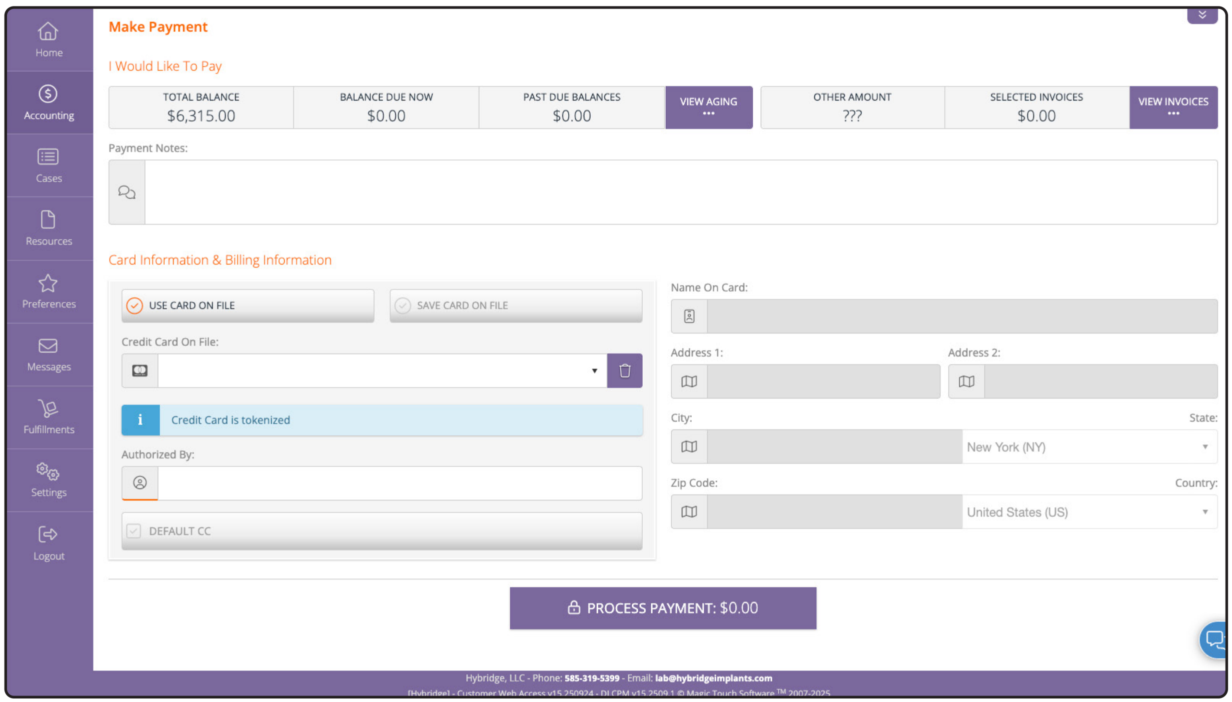
- Doctor account #
- Username
- Password

Accounting

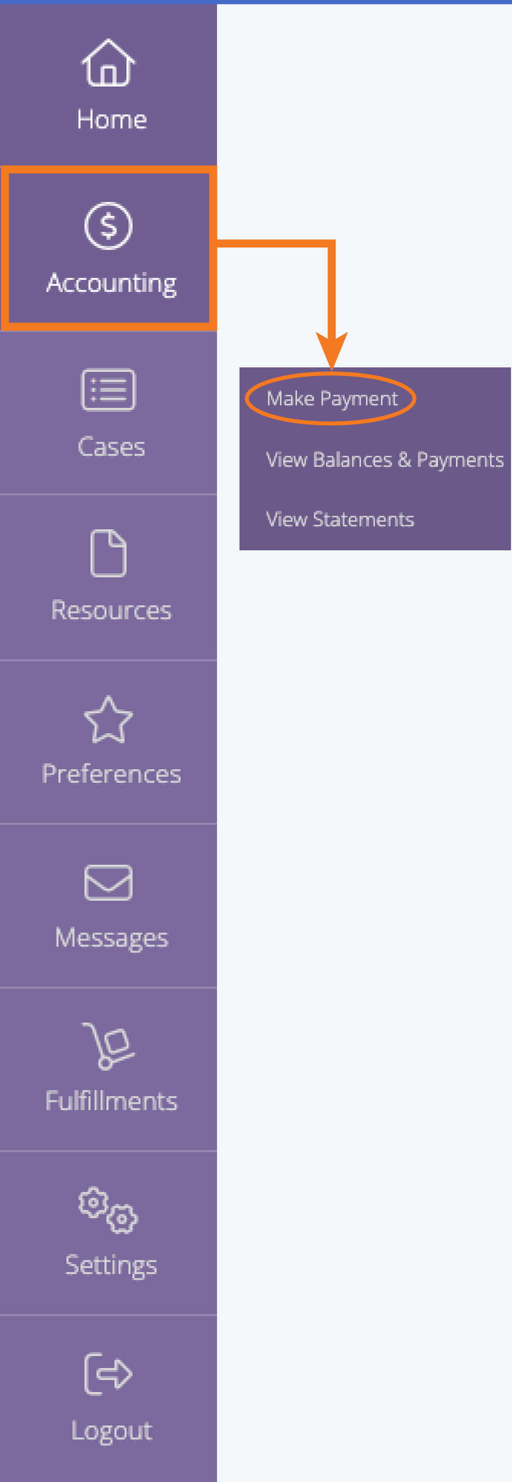


Make a Payment

- Click on “Accounting” then “Make Payment”
- Select amount option: “Total Balance” – “Balance Due Now” – “Past Due Balances” – “Other Amount” – “Selected Invoices”
- Enter a note if applicable



Accounting



Create Payment Method

- Click on “SAVE CARD ON FILE”
  - Fill in Card details
  - Add the Billing Address
  - Check “DEFAULT CC” for future payments