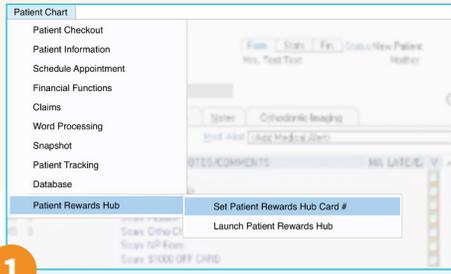


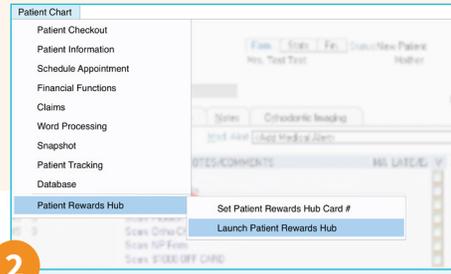
# Orthotrac Integration

To sync a patient from Orthotrac to the Hub

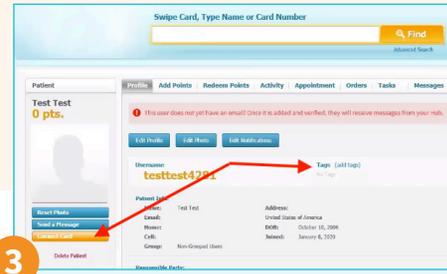
## New Patients



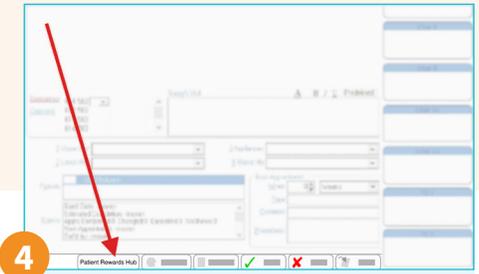
1 Go to **Patient Chart** > **Patient Rewards Hub** > **Set Patient Rewards Hub Card number**. Swipe a rewards card through the card reader, or enter the username from the back of the card. It will open up the Hub in a new browser window. Close this window.



2 Go back to Orthotrac and click on **Patient Chart** > **Launch Patient Rewards Hub**.



3 This will take you to the patient's newly created profile in the Hub, where you will click the orange **[Connect Card]** button, swipe the card or enter the card number. The patient will now be associated with that card number, and the orange **[Connect Card]** button should turn blue and say "Replace Card." Give the patient the correct tags, a status tag and a location tag. (i.e.; \*Orthodontic Patient and \*Acworth)



4 After the patient has sync'd you can go to the patient's chart in Orthotrac and click on the **[Patient Rewards Hub]** tab at the bottom of their treatment chart.

## Current Patients *Already in the Hub with a card but not sync'd with Orthotrac*

1. In the Patient Rewards Hub, go to the patient profile and copy the 16 digit username. Then in Orthotrac, go to **Functions** > **Patient Rewards Hub** > **Set Patient Rewards Hub Card number**. Paste the username in the box. It will open up the Hub in a new browser window. Close this window.
2. Then go back to Orthotrac and click on **Functions** > **Launch Patient Rewards Hub**. This will take you to the patient's profile in the Hub. If it doesn't take you to the patient's profile, then the patient did not sync, and you can try the process again.
3. After the patient has sync'd you can go to the patient's chart in Orthotrac and click on the **[Patient Rewards Hub]** tab at the bottom of their treatment chart.

## Replacing Rewards Cards

1. If your patient is already sync'd with Orthotrac and they simply need a new card, go directly to their profile in the Hub by clicking on the Patient Rewards Hub tab in their treatment chart. Click **[Replace Card]**.
2. Swipe a new card and hand it to the patient.  
*\*You do not need to set card in Orthotrac if you are just replacing their card. The only time you set a card in Orthotrac is during the original sync.*