NDX Customer Portal

User Guide

About This Guide

This guide highlights the features of the **NDX Customer Portal**, a cloud-based platform powered by EasyRx.

Please note that additional EasyRx features designed to help practices organize and manage day-to-day operations are not covered in this guide.

To explore the full range of EasyRx tools available to support your practice-specific workflows, visit the EasyRx Support Center:
https://support.easyrxortho.com/portal/en/home

Logging Into Your Customer Portal

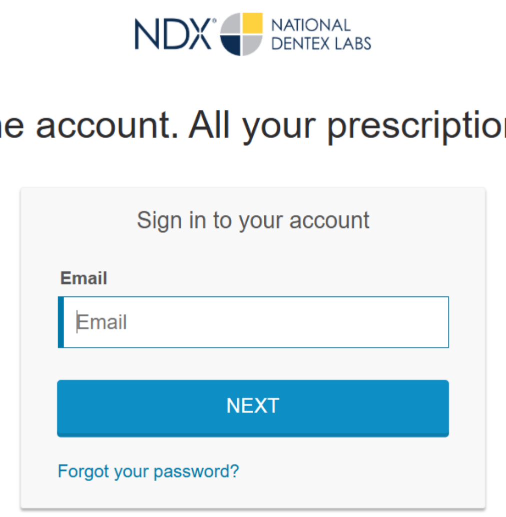
The NDX Customer Portal is a secure, cloud-based platform you can access anytime, from any device.
For the best experience, we recommend using Google Chrome.

Step 1

Check your email for an invite to log in to the portal from NDXCustomerPortal@easyrx.com.
(Check your spam or junk folder.)

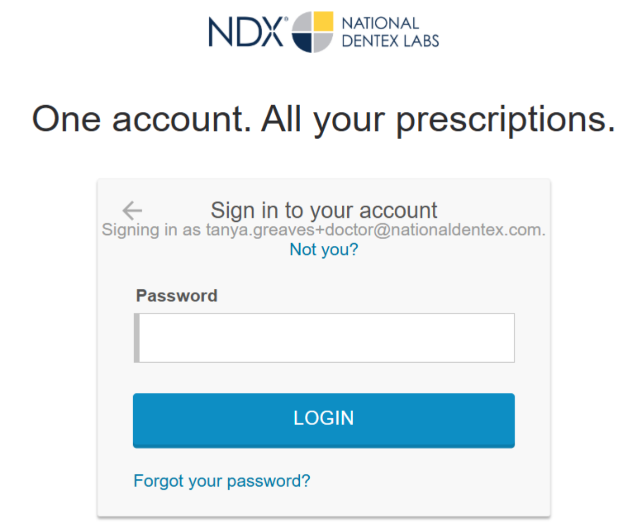
Step 2

Click the link in your email or go to (https://ndx.easyrxortho.com/) and enter your account email address.



Step 3

Enter the assigned password that you received in the email.



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If you experience issues accessing your account, please call 800.678.4140 for assistance.

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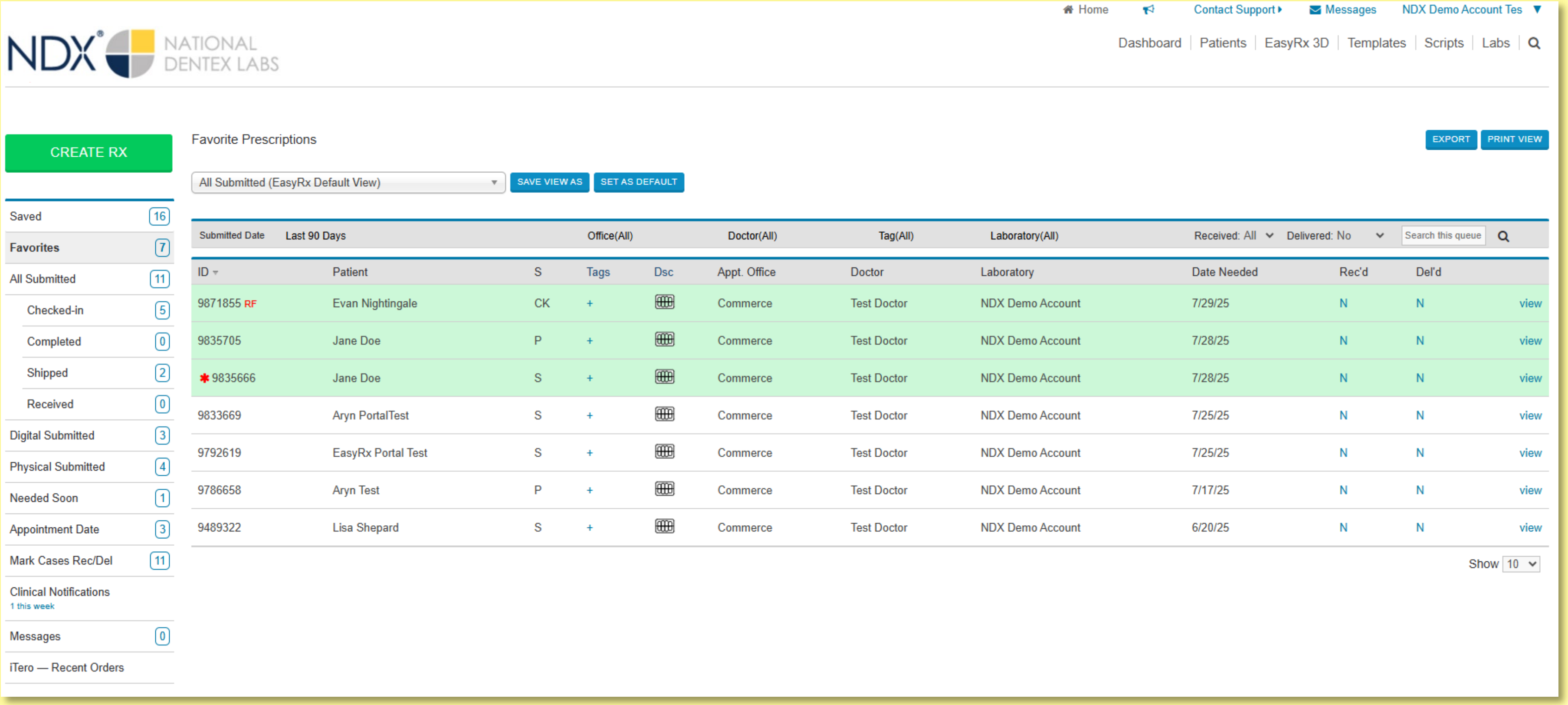
Portal Navigation – Dashboard

The portal dashboard appears upon logging in.
The dashboard can also be accessed by clicking Dashboard in the menu at the top-right.

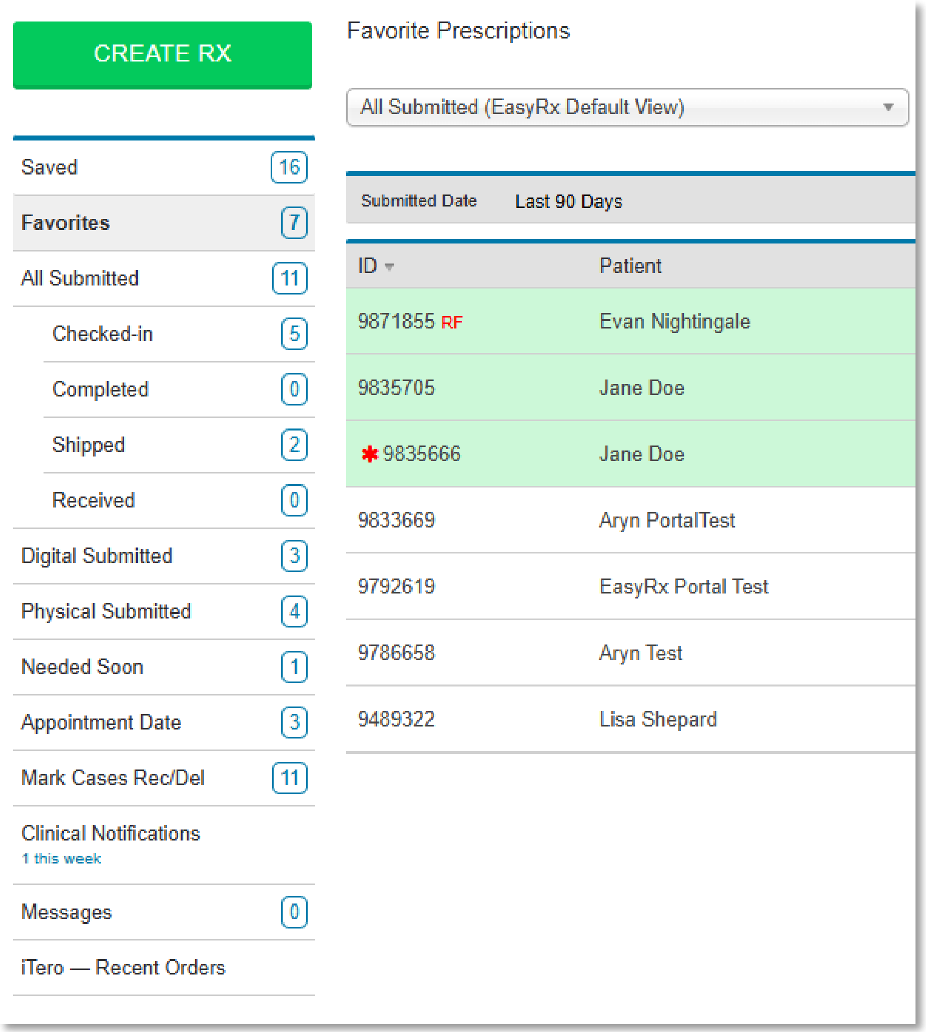
Key Features

- View Cases in Production
- Respond to Clinical Notifications
- Monitor & Update Case Status
- Navigate to Billing Information



Portal Navigation – Dashboard Views

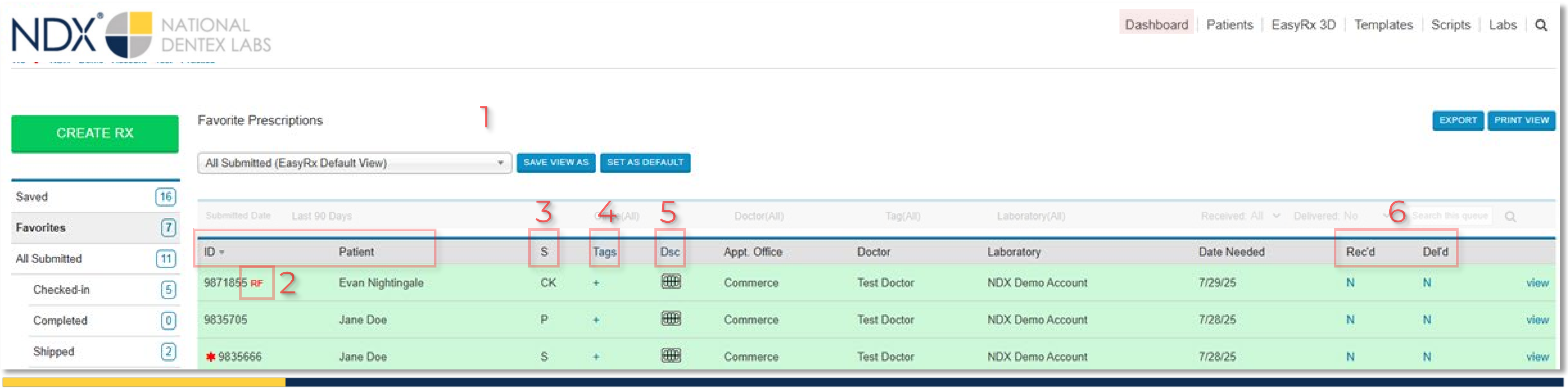
Saved	View prescriptions you have created but have not submitted to the lab
Favorites	View orders you have marked as 'favorite'
All Submitted	View all orders you have submitted to the lab
Checked-in	View orders you have submitted, and the lab has started processing
Completed	View orders that have been completed
Shipped	View orders you have submitted and the lab has shipped to your office
Received	View orders the lab has completed and you have received
Digital	View orders you have submitted digitally via the portal
Physical	View submitted orders containing physical impressions, models, etc
Needed Soon	Filter by desired due date range
Appt. Date	Filter by desired patient appointment date range
Mark Rec/Del	Search for and mark cases as received or delivered
Clinical Notifications	View & respond to notifications and questions initiated from the lab
Messages	View practice messages, clinical notifications & event notifications



Portal Navigation – Dashboard Layout & Functions

Column information can be re-sorted by clicking the column header labels.

1	The view drop down enables you to customize and save case queries
2	Case descriptor indicators appear after the ID number. RF = Case Refinement | RP = Case Repair | RM = Case Remake
3	Status codes indicate the current state of case fabrication. S=Submitted | CK=Checked In | C=Completed | P=Shipped | R=Received
4	The Tags column indicates and allows the addition of tags to orders
5	Case descriptor indicators appear after the ID number. RF = Case Refinement | RP = Case Repair | RM = Case Remake
6	The Received & Delivered columns indicate the current status of orders. These can also be clicked on to update order status



Portal Navigation – Dashboard Messages & Notifications

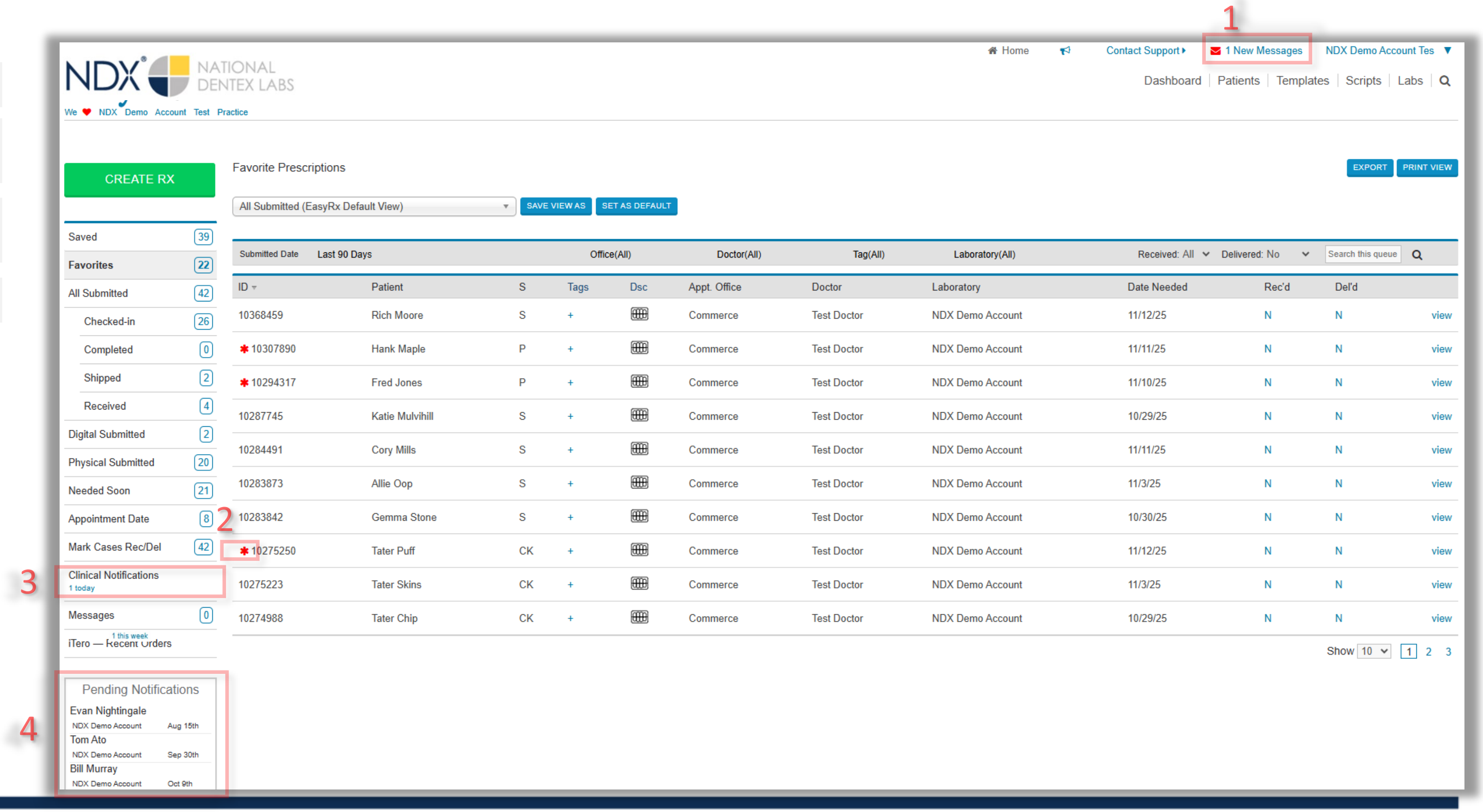
Internal and external messages & notifications appear in the dashboard view in several ways.

1 New message indicator in the top menu

2 Red Asterisk indicates new message specific to order

3 Indicates the number of new clinical notifications

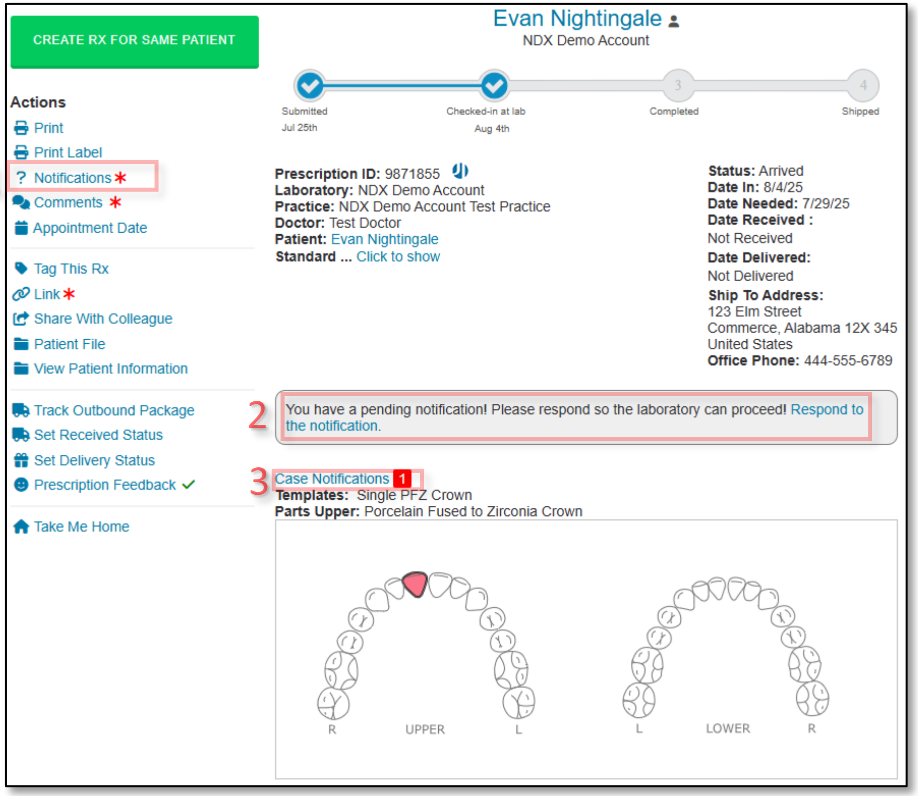
4 Pending notifications panel



Order View – Clinical Notifications

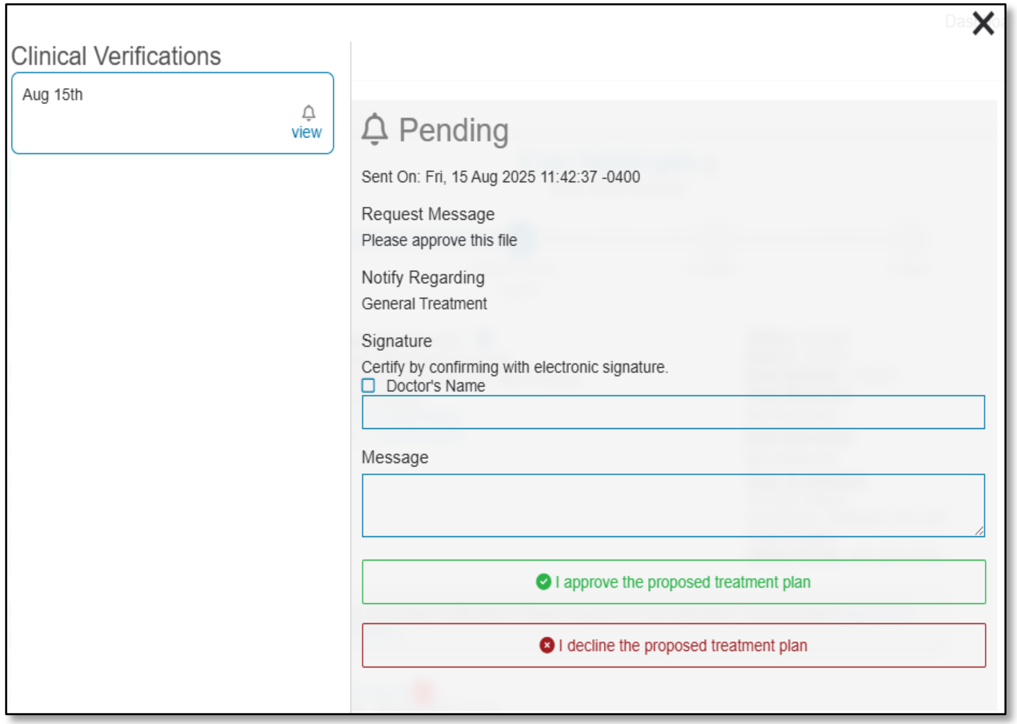
Clinical notifications appear in the dashboard view in several ways.

1	Click "Notifications" in the left panel
2	Click "Respond to the notification" in the pending notification message box
3	Click "Case Notifications" above the dental chart



Example Notification:

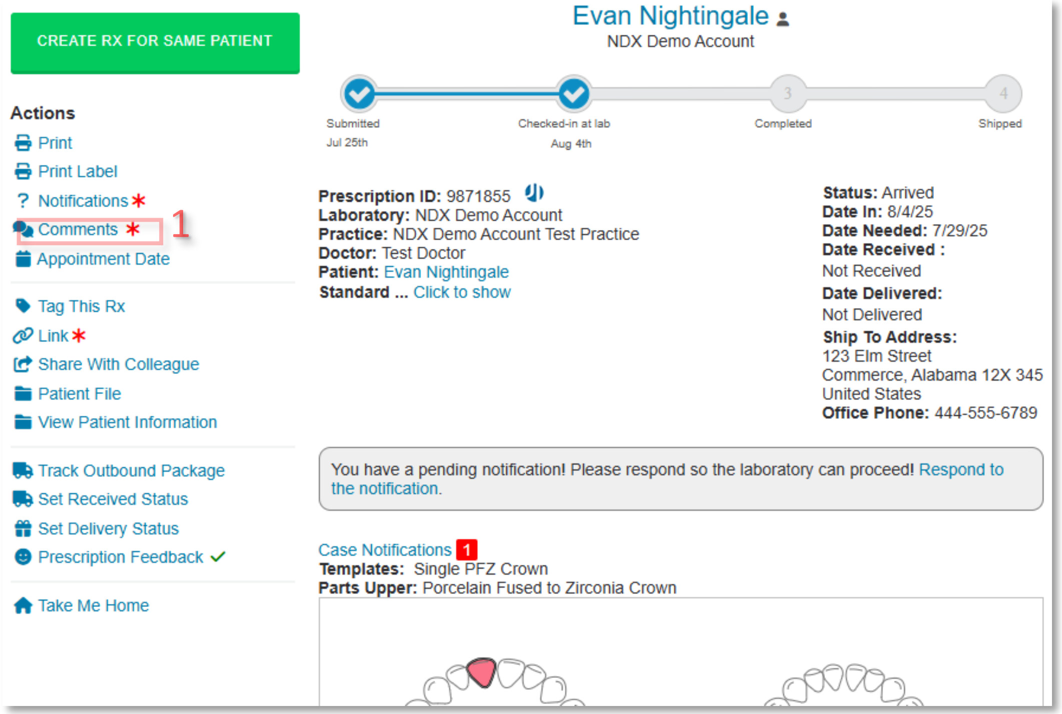
Lab requesting verification to proceed with order fabrication

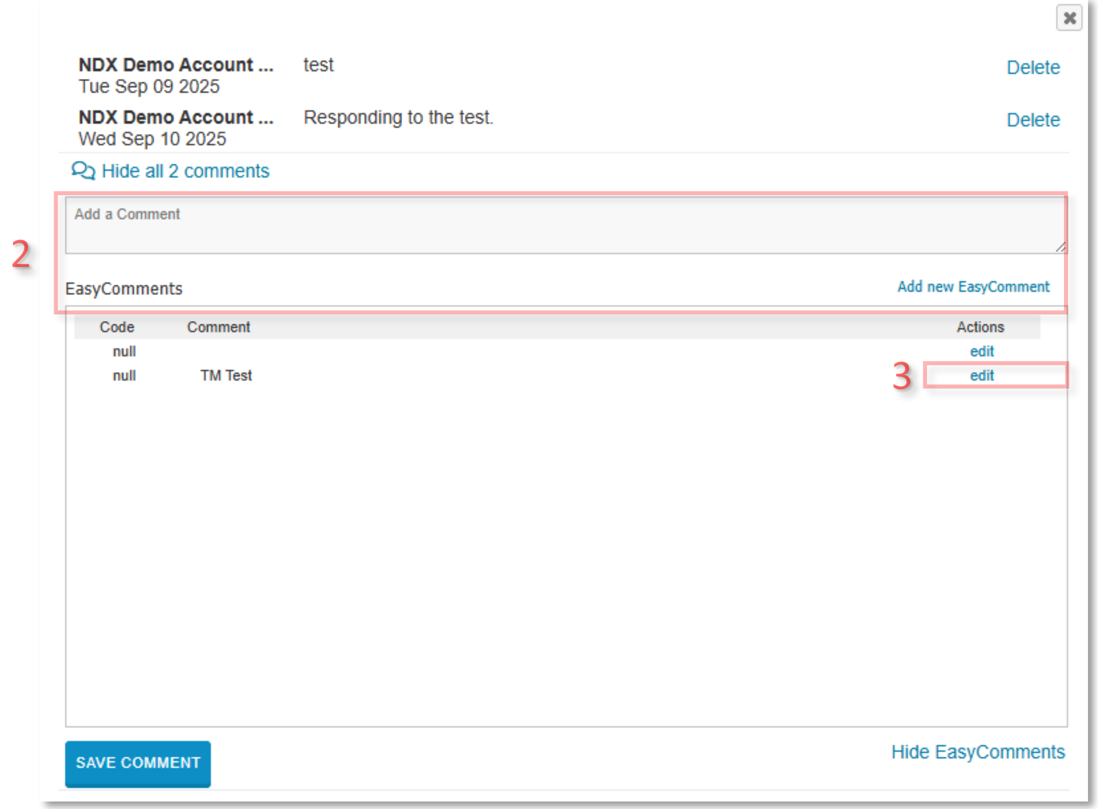


Order View – Order Comments

Order comments can be added, viewed and edited at the case level. This feature is intended for communication within your practice only and can not be seen by your lab.

1. Select “Comments”
2. Type your comment and click “Add new EasyComment”
3. Click “Edit” to adjust a previously sent comment

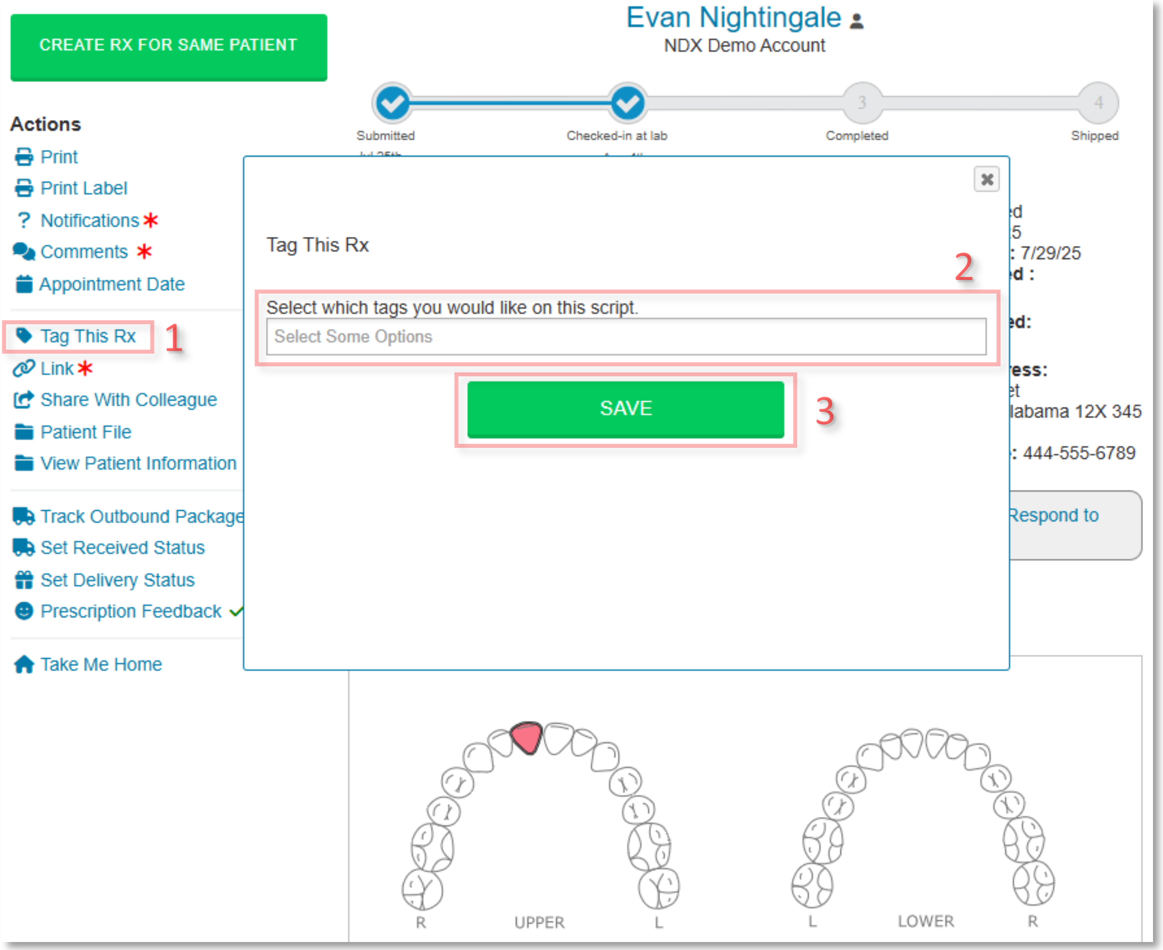




Order View – RX Tagging

Tags can be any text or "indication" you want to associate with a prescription i.e. “Needs Dr Review.” Tags are searchable, so use descriptive, easy-to-search terms. This is for your team. The lab does not see this.

1	Select Tag This RX
2	Select desired tag(s)
3	Click Save

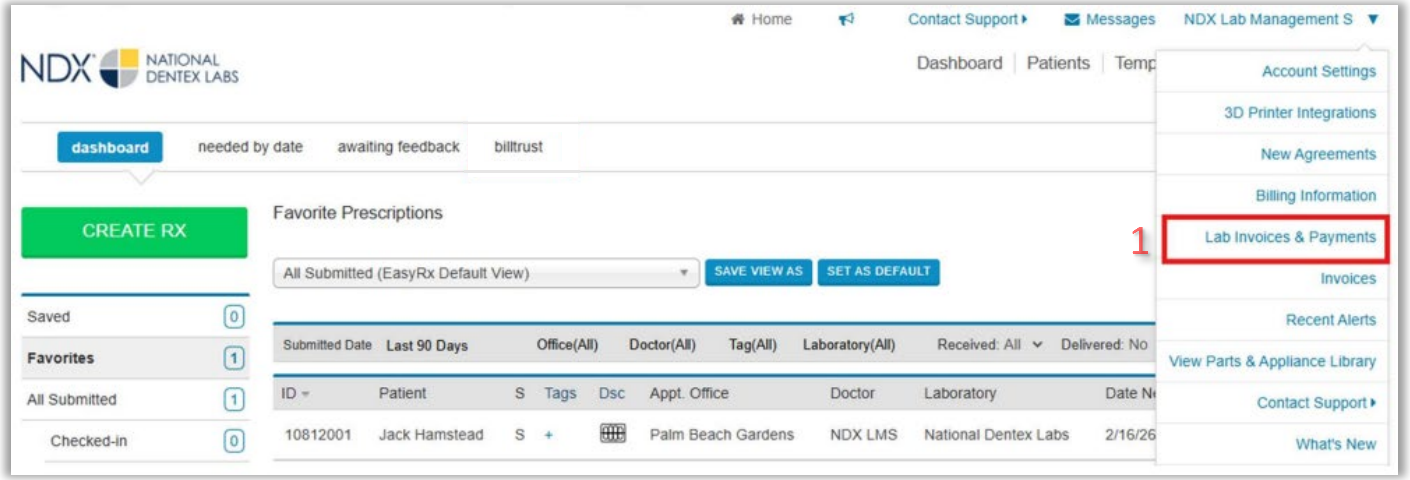


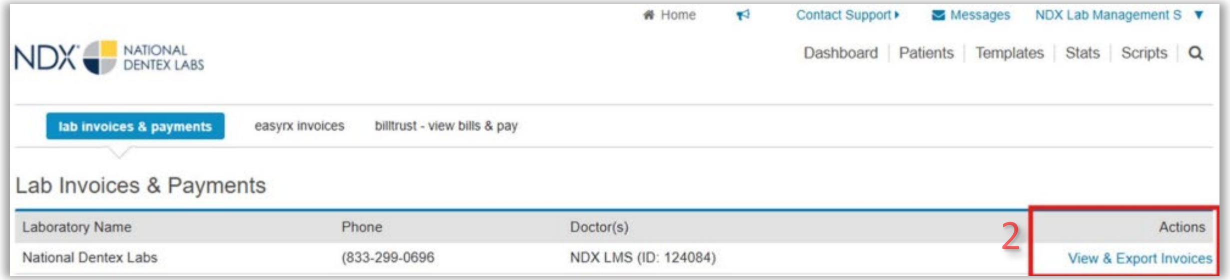
View and Download Statements & Invoice Details

1 Click on your Account Profile and select “Lab Invoices & Payments”

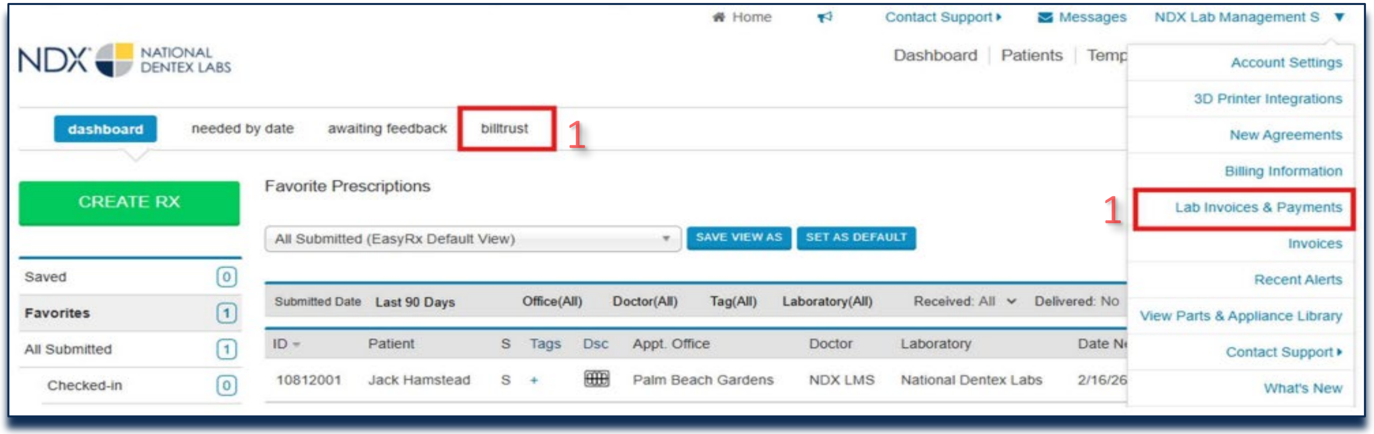
2 Click “View & Export Invoices”

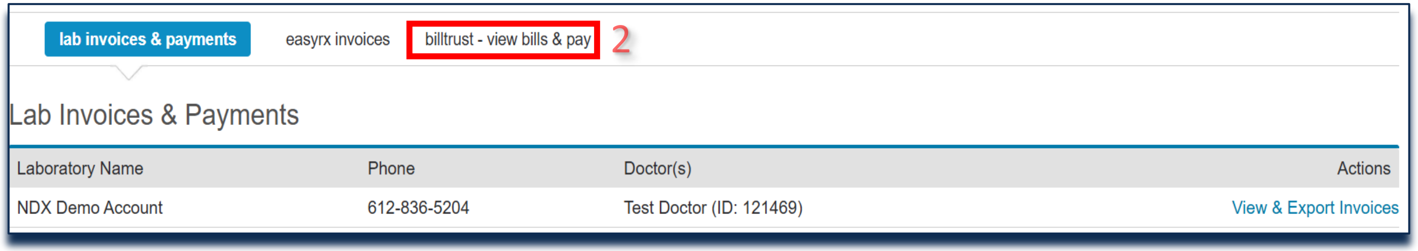
3 Click “Download” for monthly statements or “Export Statements To CSV”

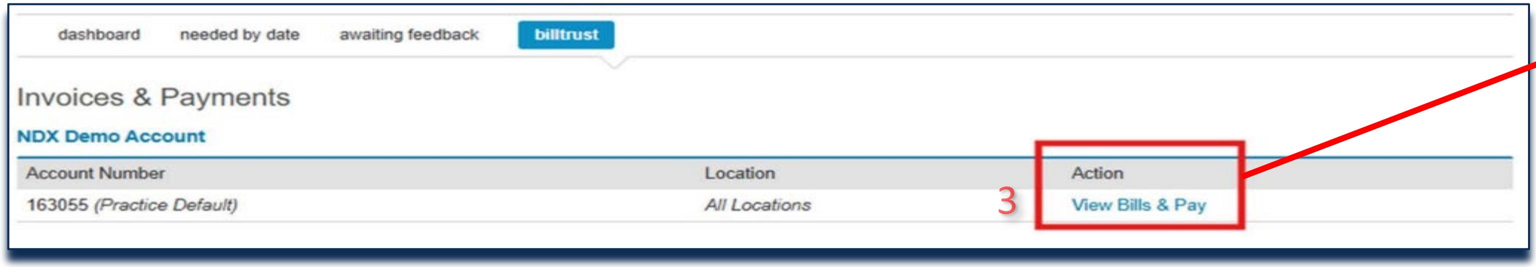


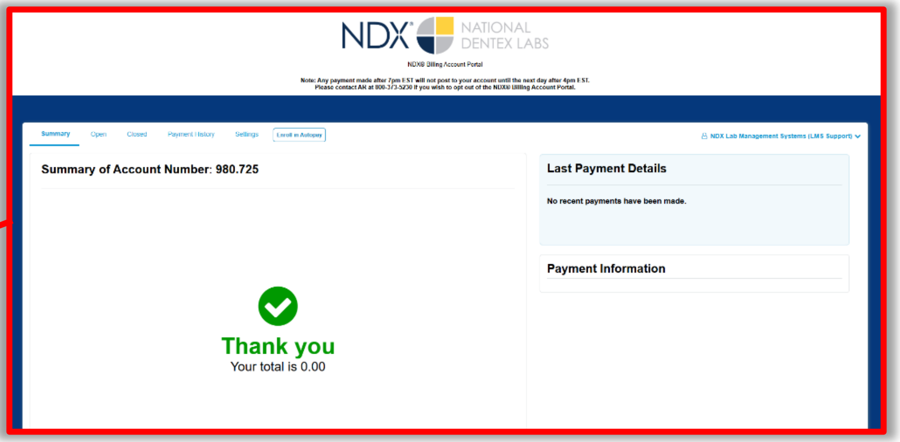


View Invoices/Statements & Make Payments with Billtrust







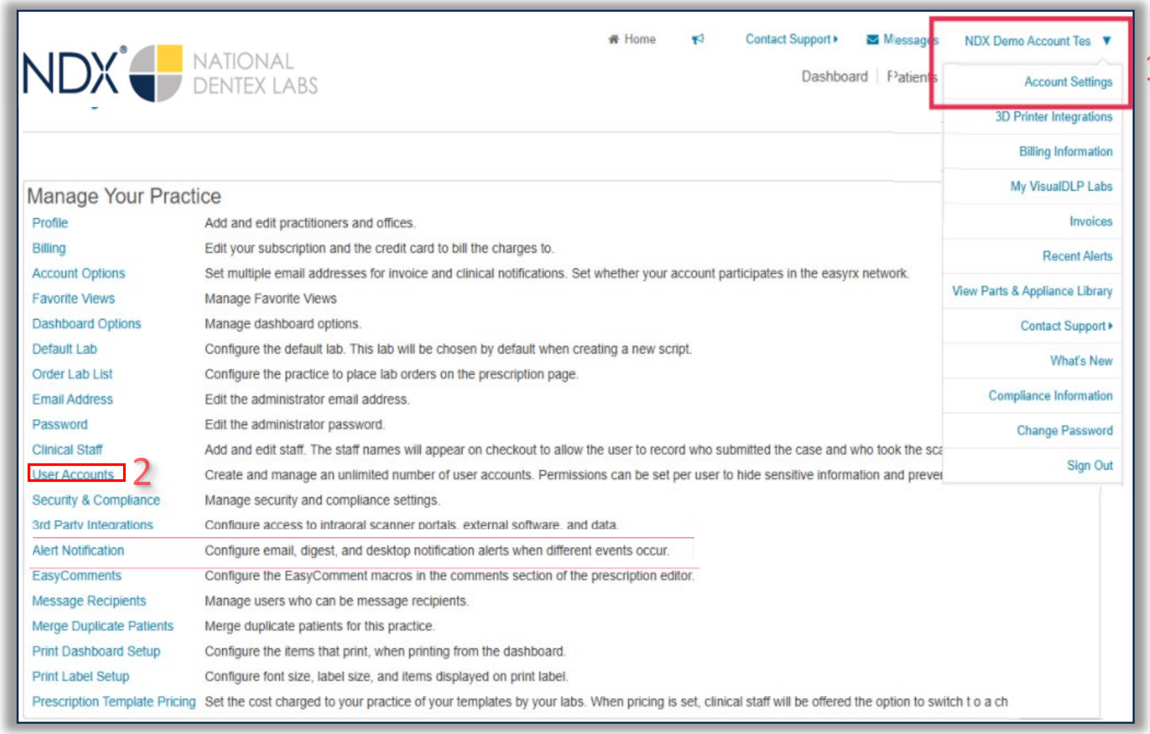


1	Click "Billtrust" at the top of the dashboard or click on your "Account Profile" and select "Lab Invoices & Payments"
2	Click "Billtrust- View Bills & Pay"
3	Click "View Bills & Pay" to enter the Billtrust Portal

Portal Account Settings – User Accounts

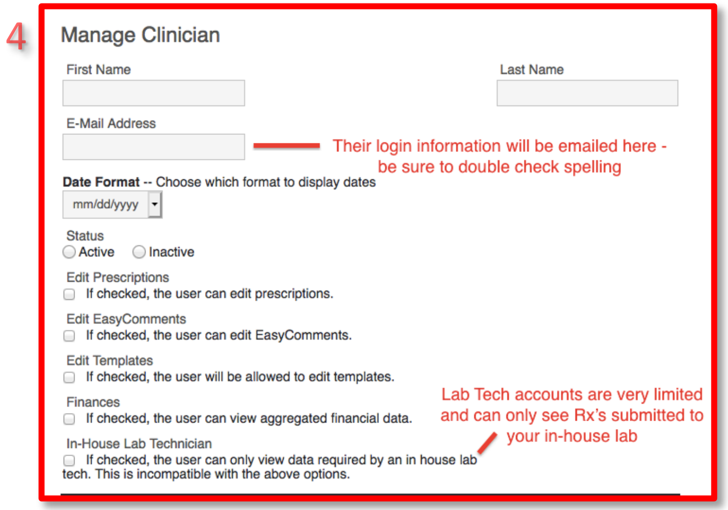
1 Click on your Account Profile and select "Account Settings"

2 Select "User Accounts"



3 Click the "Create New Clinician Account" to add a user.

4 Set permissions as required for the specific user



NOTE: You will want to disable access for employees that leave the practice. Simply mark those employee's accounts as 'inactive' and save. You do not want to delete the user because EasyRx tracks previous prescriptions and who created/edited it, you still want their record in EasyRx to track them if needed down the road.

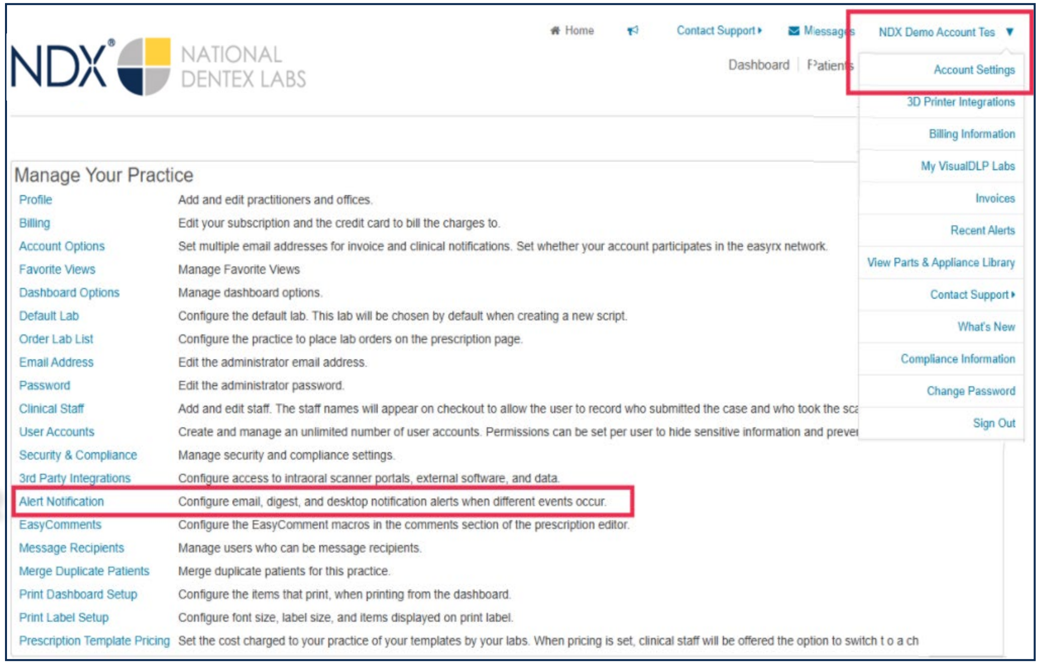
Enable Daily Digest Emails

1 Click on your Account Profile and select “Account Settings”

2 Select “Alert Notifications”

3 On the Alert Notifications page, add notifications using the drop-down options

4 Once the 'Notification Method' is selected, a text box will appear to enter the recipient’s email address



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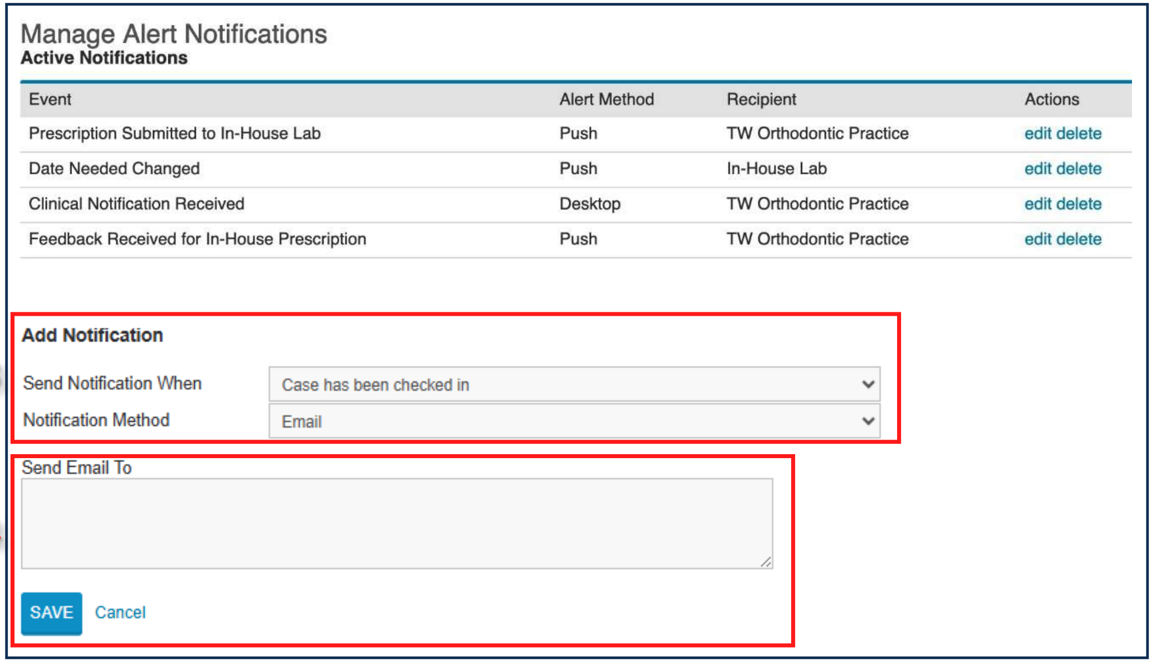

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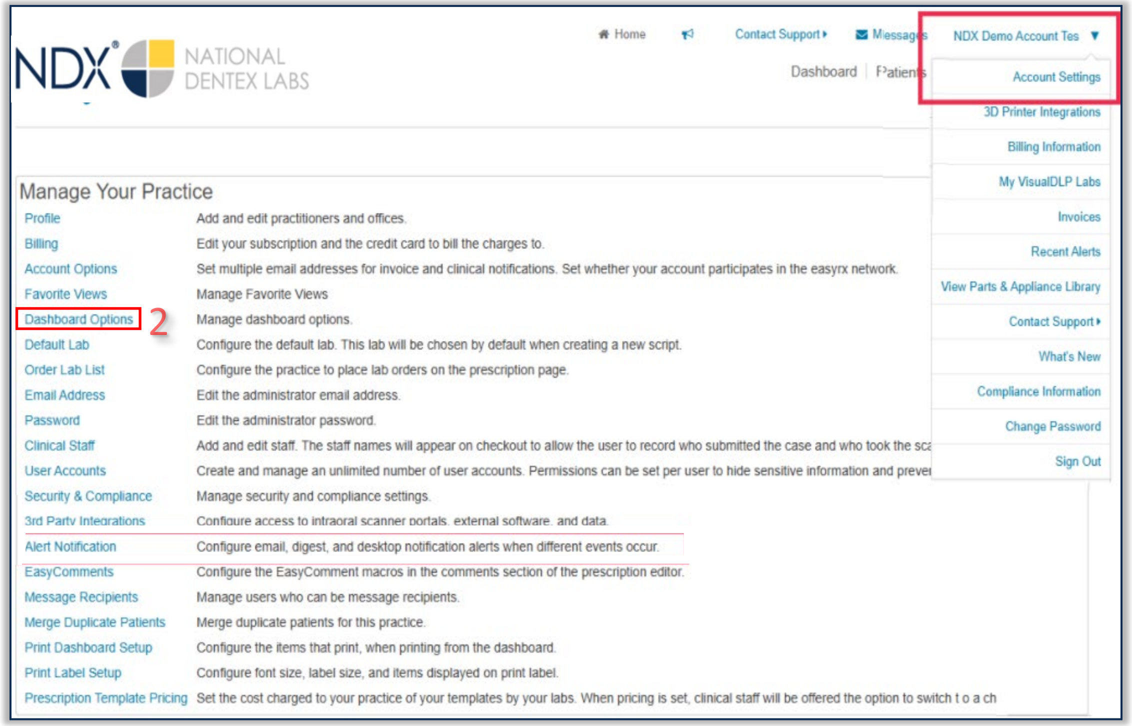
Note: *If the same recipient email address is entered for multiple digest email alerts, then one single digest email will be sent that includes all of the requested updates. Digest emails are automatically generated and sent to the recipient's email address at approximately 3:00 AM/ET.*

Customizing Dashboard Color Codes

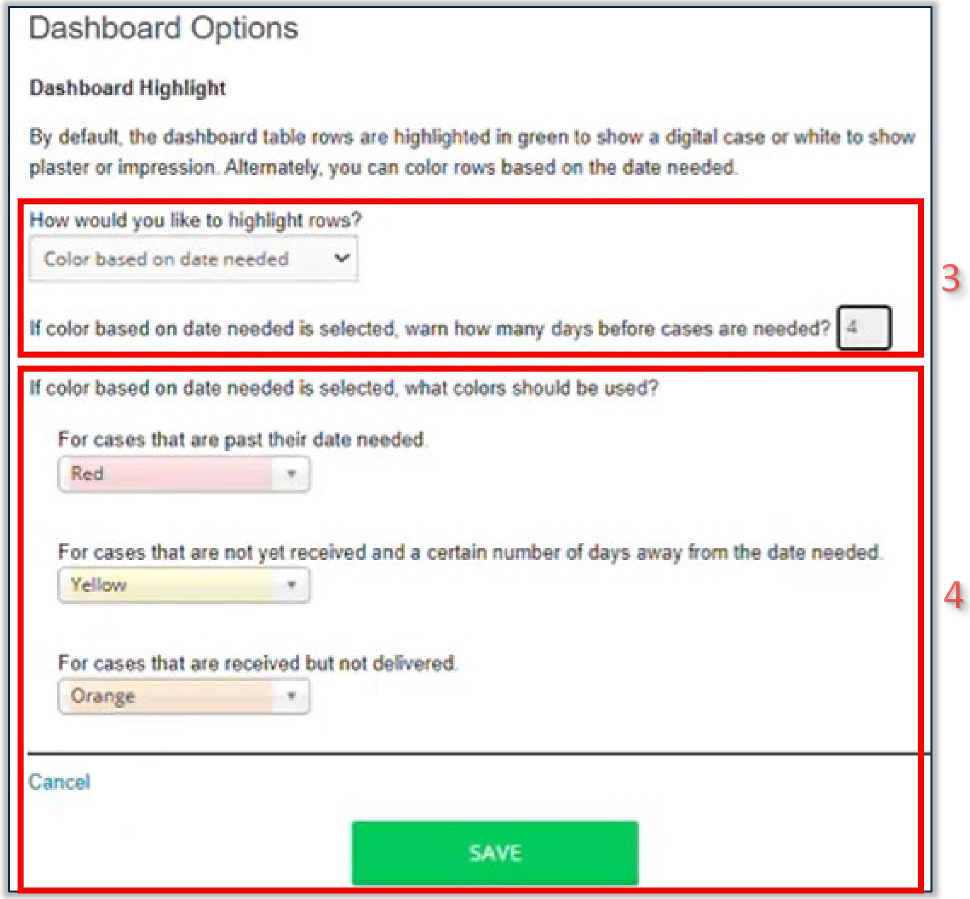
1 Click on your Account Profile and select “Account Settings”

2 Select “Dashboard Options”



3 Select “Color based on date needed” and enter the desired warning time frame

4 Choose the desired color for each option and click “Save”



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