



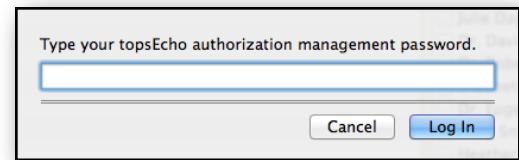
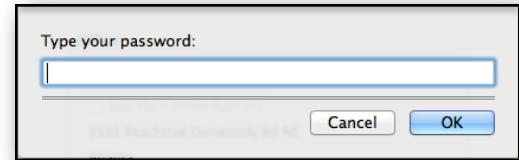
## topsEcho Manual



# Set up and Pairing

In order to pair your mobile device and your topsServer, you must be logged in to a topsOrtho workstation (running v4.1 or higher) and have your iPhone, iPod Touch or iPad. The process is easy-peasy.

1. Download the topsEcho app from the App Store. Simply search for **topsEcho** and download the app.
2. After the download is complete, tap to open the **topsEcho** application.
3. Connect your iPhone or iPod Touch via Wi-Fi to the same local network as your workstation. To do this, open the Settings app on your device and tap Wi-Fi and verify the device is on the same local network as your workstation.
4. Check the Wi-Fi symbol on your device to ensure you're properly connected.
5. Now we will begin the pairing process. From your device, tap the **Pair with Another Practice** button and follow the topsEcho pairing instructions on your device.
6. From the topsOrtho menu, open **Practice Setup**.
7. Enter your **topsOrtho password** and click **OK**. (your topOrtho password!)
8. From Practice Setup, select the **topsEcho** tab. You must have the appropriate security permissions; by default all orthodontists have these privileges.
9. Enter your **topsOrtho password** and click **OK**. (your topsOrtho password!)
10. Now enter your **topsEcho authorization management password**. Team tops will provide you with this password. Keep your password in a safe place; you will need it to manage your devices.
11. Click **Log In**.

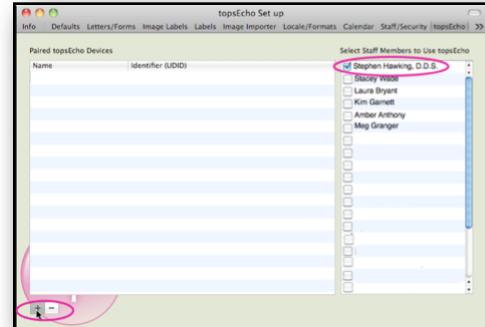


# Set up and Pairing

12. First you will set up Doctor and Staff access to topsEcho. Place a checkmark next to the names of those who are allowed access to topsEcho.

13. After the selections are made, in the lower left corner, click **[+]** **button**.

**Note:** If your device is ever lost, stolen, or no longer in service, select the device name from the list and click **[ - ]** to remove it. If a staff member with topsEcho access leaves your practice, simply uncheck their **name** from the column at right.



14. Now you will pair the device, from the list of topsEcho Devices, select the **device** you want to pair.

15. At this time, you should see **four digits** on your device, enter those numbers into the **Digits: field** in topsOrtho.

16. Click the **Pair button**.

17. Success! You have paired your device and your topsServer. Do this for each device you wish to pair.



# Using topsEcho

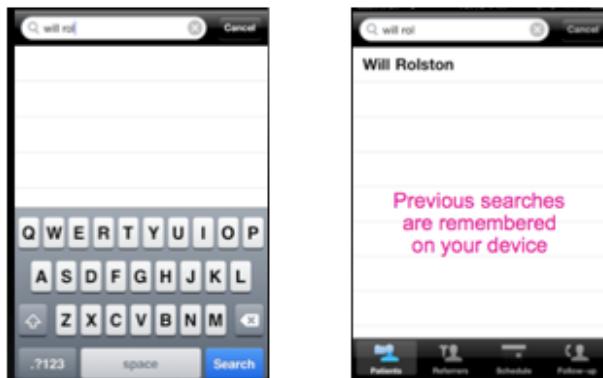
## Signing in:

1. From your device, tap the **topsEcho icon**.
2. Tap the **password** field.
3. Enter your **topsOrtho password**.
4. Click **Go**.



## Viewing Patient Info:

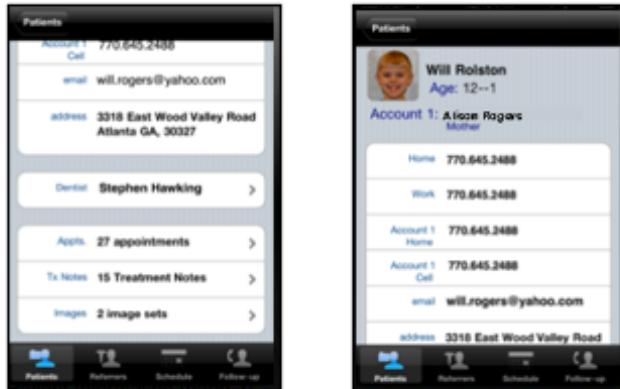
1. From your device, tap **Patients** in the lower left corner.
2. Search for patients the same way you search for them in topsOrtho. Type first few initials of the patient's first name, a space, and the first few initials of his last name. • Example: will\_rol



3. Tap the blue **Search** button in the lower right corner.

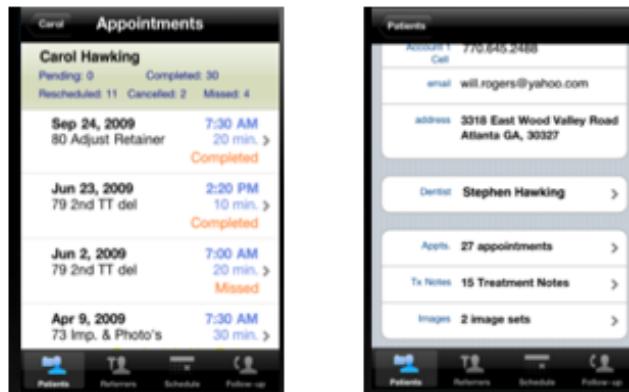
# Using topsEcho

4. Tap the corresponding fields to launch phone, mail or mapping applications, just as if you were using your device's Contacts list.
5. If a chevron [ > ] is available, tap to view additional information.



## Viewing Patient Information Appointments

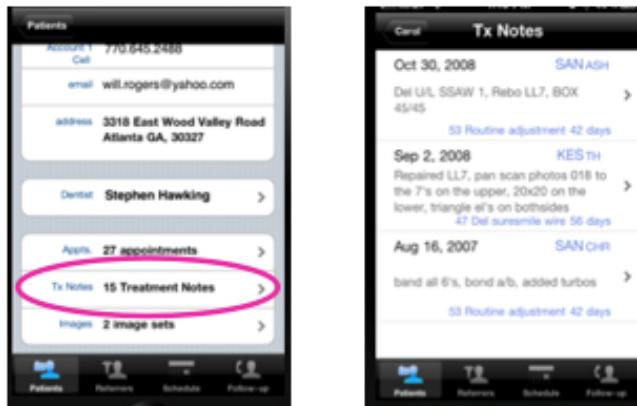
1. Tap **Appts** to see appointment information.



# Using topsEcho

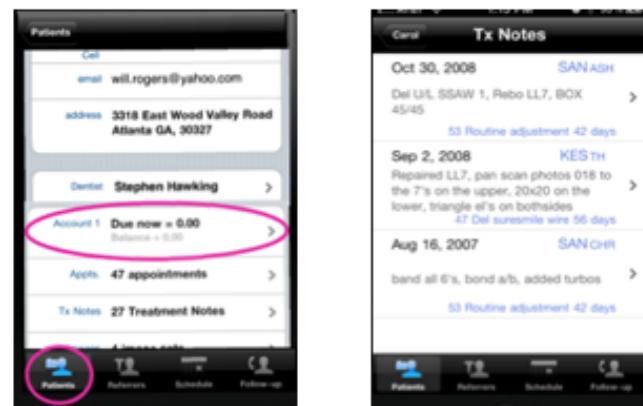
## Patient Information Treatment Notes

1. Tap **Tx Notes** to view treatment note information.



## Viewing Patient Information Ledger

1. Tap **Account** to view patient financial information. If there are two accounts with contracts, there will be two buttons, Account 1 and Account 2. If there is no contract, no Account button will be available.



# Using topsEcho

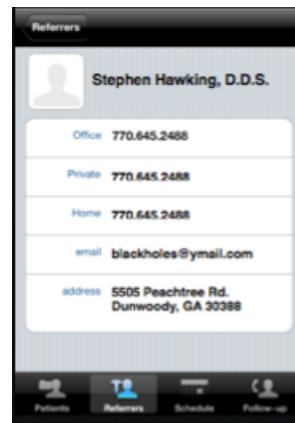
## Viewing Patient Information Image Sets



1. Tap **Images** to view image sets and tap to select the image set you wish to view.
  - Pinch your fingers together to zoom in, and apart to zoom out.
  - Or double-tap to zoom in, and double-tap again to zoom out.
2. Scroll through images by using the arrows or swiping.

## Viewing Referrers

1. From the bottom menu of your device, tap **Referrers**.



2. Search by typing a name and tapping **Search**.

# Using topsEcho

## Viewing the Schedule

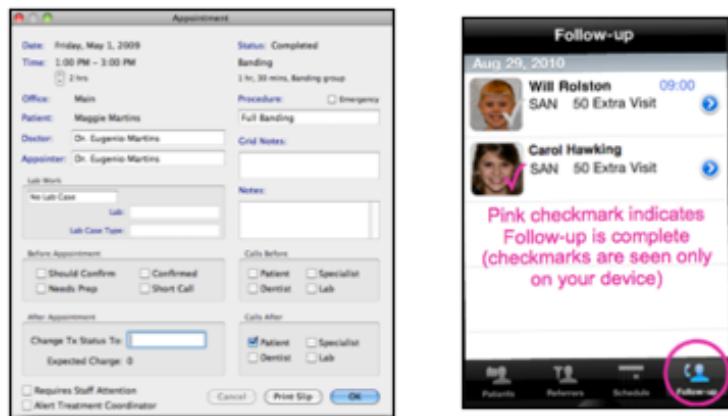
1. From the bottom menu on your device, tap **Schedule**.
2. From the top of the screen, flick or tap **right or left arrows** to view previous or future days.
3. Swipe to scroll **up and down, left and right** through the selected day to view schedule.
4. Tap any **Appointment** to open and view. Note: If you have multiple offices or doctors, in the upper left of the screen, tap the Office/Doctor button to sort.



# Using topsEcho

## Using topsEcho Follow-up

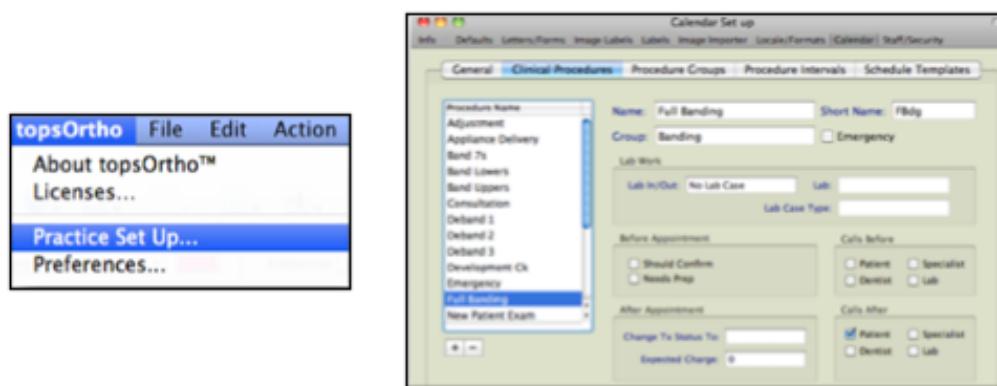
1. From the bottom menu on your device, tap **Follow-up**.
2. Any appointments selected for Follow-up will be shown.
3. Patients must be manually selected within topsOrtho for Follow-up to be activated in topsEcho.
  - Go to the topsOrtho Appointment information window. In the Calls After section, check Patient.
  - This will trigger a Follow-up within topsEcho.
  - See next page for directions on setting up automatic Follow-ups based on procedure type.
4. After your Follow-up call is complete, tap on the **patient's photo** to change the gray checkmark to pink.  
Note: checkmark changes show on your mobile device only.
5. Tap the **blue chevron** to view additional patient information. The Follow-up feature works for the current day only. The next day, patients selected for Follow-up will no longer be visible from topsEcho.
  - If more than one topsEcho device is used in your practice, you should develop a strategy for who will complete follow-ups, since all topsEcho devices will see all follow-up patients. It may help that the doctor's name is listed below each patient's name.
  - No communications are relayed from topsEcho to topsOrtho. Treatment notes must be made directly into topsOrtho.



# Using topsEcho

## Setting automatic Follow-up based on Appointment Types

1. From the topsOrtho menu, select **Practice Set Up...**
2. From the **Procedure Name** list, select the appropriate **appointment type**.
3. From the **Calls After** section, check **Patient**.
4. Exit the window when finished. This will trigger a Follow-up in topsEcho each time the specified type of appointment is completed.





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- topsCheck-In for iPad™ is a fast, easy, reliable way for patients to check in using an iPad.

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