

The Challenge



Describe your document signature process at the start of your e-Signature evaluation process?

Our process was totally manual; pen and paper. The providers had to get signatures from responsible parties and manually fax or mail them to the OrthoBanc office.

What drove you to evaluate tools in the market? Did you have specific signature process challenges?

The manual process was slow and painful to manage for our customers and the OrthoBanc staff. With over 11,000 accounts being activated every month, it was a large task for all involved. Previously, the staff dealt with a mountain of faxes and were faced with keeping the information secure while awaiting data entry. After entry, the faxes required manual filing. Throughout the entire process care had to be given to follow various compliance regulations, and due to this, on many occasions we nearly missed a first payment. With AlphaTrust and our document management system, the process became paperless, significantly accelerated, and far more reliable for all parties.

What led you to choose AlphaTrust?

Having the on-premise option was very attractive to us. AlphaTrust worked closely with OrthoBanc to develop an attractive fee structure. They truly partnered with us.

At a high level, how did AlphaTrust help solve your specific challenges once implemented?

With AlphaTrust, the ability to obtain signatures was simplified. Having a variety of options to collect those signatures whether through our website, on an iPad, or through email reduced the workload of our agents and greatly reduced the time from our first contact with the customer to having an agreement in place. 55% of all our agreements are signed using AlphaTrust.

The Solution



What features do you like best about AlphaTrust?

The overall ease of use and the ability to embed the AlphaTrust API into other platforms has allowed OrthoBanc to provide our customers prepopulated forms with complete information, so electronic signatures can be obtained. The result has been a very positive user experience.

Is anyone using AlphaTrust in a way that you hadn't predicted?

Using workflows has been very beneficial. They don't require technical expertise, so we are developing a completely digital onboarding process. We plan to use the dashboard analytics to identify areas of improvement to onboarding.

We have benefited from eSignature capabilities on our website. Customers can hop online, make necessary changes to their information, and authorize those changes through electronic signature all in one place, our website.

The Results



Was there an "a-ha moment" when you knew AlphaTrust was doing what you had planned for it?

Since we transformed our manual processes to a digital experience, our efficiencies have improved just as we had hoped. OrthoBanc is the industry leader in our space and AlphaTrust has helped us to remain ahead of the curve.

What data do you look at that proves the value of AlphaTrust to your business?

We average 22,000 new activations a month, and over 55% of our agreements are eSigned using AlphaTrust.

Recommendations



What best practice(s) would you recommend for new implementers of AlphaTrust?

Think about using AlphaTrust in every part of your business. We have discovered ways to increase our value through AlphaTrust in several areas of our company.

Think outside of the box prior to implementation. Reach out to all departments and ask for ideas on how they may be able to use AlphaTrust in their area to solve some process and efficiency challenges.

What is the biggest reason that you would recommend AlphaTrust to a carrier?

AlphaTrust has been a great partner to OrthoBanc. They have provided a great service that helps us help our customers. We consider AlphaTrust a partner so much more than a vendor.

We love the service, technology and support we have received from AlphaTrust.

Customer Overview



OrthoBanc is a risk assessment and payment management provider specializing in electronic payments at a set monthly fee for orthodontists, dentists and other companies that provide services. OrthoBanc currently does business as OrthoBanc, DentalBanc and PaymentBanc.

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