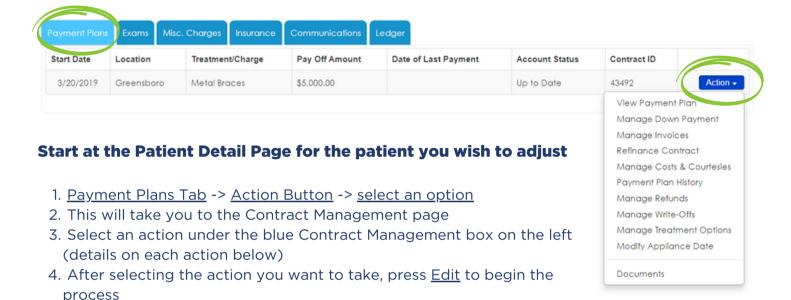


immediately

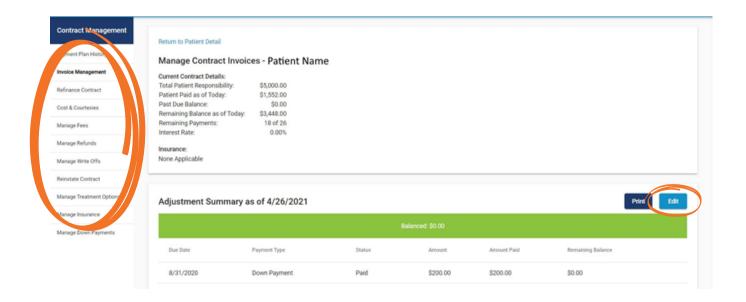
Patient Contract Management

The Patient Contract Management tool gives you the ability to make adjustments to active patient contracts without needing to contact OrthoFi Support. Access to these abilities are restricted based on the user's rights set up via the Team Management button.



All activities will automatically log in the patient's Communications tab. You now will have the option to mark the contract for re-sign by clicking the <u>Action</u> Button.

5. Save your work & enter a note at the bottom for changes to take effect





Contract Management Glossary



Payment Plan History

- Overview of current patient contract details and insurance benefit details.
- No changes can be made from this page.

Invoice Management

- Allows the user to make changes to invoicing schedules such as adjusting future payment dates, payment amounts, suspend invoicing schedules, etc.
- If the 'Suspend Contract' option is used, the contract will be suspended indefinitely until it is manually reactivated by the user. If the suspended contract is interest-bearing, interest will continue to accrue on a daily basis. If a suspended contract has past due invoicing, the patient will reflect on the Delinquent Report.
- If the 'Move Schedule' option is used, this will bring any past due invoices current. Past due invoicing cannot be adjusted or reset without being brought current first.
- The 'Move Schedule' option can also be used to apply bulk payments to the next invoices rather than the principal balance.
- If the 'Edit Monthly Due Date' option is used, the user can select a new monthly invoice due date between 1 and 28.

Refinance Contract

- Allows the user to make changes to a contract such as removing interest, changing the number of invoices, and changing the invoice payment amount.
- Only contracts that initially were interest-bearing can have interest adjusted. Remember to click in the white space for the system to calculate updates.

Costs & Courtesies

 Allows the user to apply an additional cost or courtesy/discount to an active contract. If the Refund option is active, the user will be able to refund certain items, when applicable. After clicking the 'Edit' button, the user must select the 'Add' button to make changes.

Manage Fees

Allows the user to reverse fees automatically applied to an active contract (i.e. late fees).



Contract Management Glossary [cont.]



Manage Refunds

- Allows the user to refund a specific payment on an active contract, or reflect a practice issued refund, etc.
- The user will not be allowed to process a partial refund to any payment method on file in OrthoFi.
- OrthoFi cannot refund a payment method for transactions older than six months. OrthoFi
 cannot refund any ACH transactions for a minimum of seven business days. The user will
 not see these options until time is lapsed.

Manage Write Offs

Allows the user to write off an active contract balance. If the Refund option is active, the
user will be able to refund certain payments, when applicable.

Reinstate Contract

- Allows the user to activate a previously written off contract/payment plan.
- When the user reinstates a contract, they also must refinance the contract.

Manage Treatment Options

- Allows the user to change a treatment option (metal braces, Invisalign, etc.) on an active contract. If the Refund option is active, the user will be able to refund a certain payment, when applicable.
- The user will have the ability to select all treatment options previously presented on the slider. The user will also be able to build a custom plan using this option, but it must reflect the total treatment fee (including what may have previously been paid).
- OrthoFi will automatically adjust and process any claim submission needs.

Manage Down Payments

- Allows the user to change a down payment amount after the contract has been signed.
- If the down payment has already been paid in full, the user cannot make edits.