Cloud 9 Connect - Staff Job Aid

Cloud 9 Connect allows you to import patient and exam information from Cloud 9 into OrthoFi and gives you visibility of your past due OrthoFi accounts in Cloud 9.

Cloud 9 Scheduling Requirements

Certain fields are required in Cloud 9 in order for patients and exams to properly import to OrthoFi. The **Financially Responsible** section in Cloud 9 will import to OrthoFi as the **Primary Contact**. The information in this section should correspond with the person who you would **like to receive OrthoFi's patient forms**.

Patient Section
- Patient Name
- Patient Gender
- Patient DOB
- Provider
- Location

Financially Responsible Section
- Relationship Type
- Primary Contact Name
- Primary Contact Gender
- Primary Contact DOB
- Primary Contact Phone
- Primary Contact Email

Responsible Party Contact Info and Linking

Patients will not be available to import unless their Responsible Party has both Email and Phone Number added to Cloud 9. If you are adding siblings, make sure they are linked to the same Financially Responsible Party Record. If the patient is their own Responsible Party, mark them as Relationship Type = Self in Cloud 9.

Importing Patients and Appointments from Cloud 9

1. Add patients and exams from Cloud 9 to OrthoFi via the **+Add Cloud 9 Patient** button on the OrthoFi Patients Page.

+ Add Cloud9 Patient

2. Search for the patient using their Cloud 9 Patient ID (preferred) or Last Name.

3. When you locate the patient you wish to import, press the **Select** button and proceed to the next steps to customize patient information.

OrthoFi Connect Search

cloud9ortho

This search module is available to do an immediate pull of data from Cloud9 in order to copy over patient records into the OrthoFi system. You can search for your patient record by searching the Cloud9 patient ID or the patient's last name.

Search Patient ID or Last Name
123456

Select Practice
Storms Orthodontics ▼

SEARCH

Patient Name	Patient Birthdate	Status in Cloud9	Cloud9 Practice Location	Action
Johnson, Suzie	Apr 1, 2010	NP-Ortho	Maureen Isle	SELECT >

4. Verify Patient, Exam, and Staff information and then press the Verify button to proceed to the next page. You can edit any of the fields - please correct any errors you see.

Review & Confirm Info:
Suzie Johnson

Please review and confirm if the insurance and information provided is still correct. If anything has changed or is missing, please update.

① Patient Info

Email Address
suziesmom123@email.com

Primary Contact Phone Number
(555) 555-5555

Guardian First Name
Samantha

Guardian Last Name
Johnson

Patient First Name
Suzie

Patient Last Name
Johnson

☐ Patient is the same as the Guardian.

Patient Birthdate
4/1/2010

Status in Cloud9
NP-Ortho

OrthoFi Practice Location
Denver

VERIFY

② Exam Details

Certain Cloud9 information may not match what's in OrthoFi. If so, please review and select the applicable OrthoFi value for each exam field below.

☐ Do not create a patient exam for this patient.

Exam Date
12/13/2021

Exam Time
09:00 AM

Exam Location

OrthoFi Value
Denver

Cloud9 Value
Maureen Isle

Exam Type

OrthoFi Value
New

Cloud9 Value
EXAM- NP Exam CHILD

☑ Send welcome email

☑ Send welcome text message

VERIFY

③ Staff Details

Certain Cloud9 information may not match what's in OrthoFi. If so, please review and select the applicable OrthoFi value for each exam field below.

Treatment Coordinator

OrthoFi Value
Treatment Coordinator

Cloud9 Value
n/a

Treating Doctor

OrthoFi Value
Dr. Doctor Cloud9

Cloud9 Value
Dr. Connie Nienow

VERIFY

5. Insurance information will not transfer from Cloud 9, so you will need to add insurance information directly to OrthoFi. Since OrthoFi manages your insurance, you only need to add this information into OrthoFi.


ALL FIELDS IN THIS SECTION ARE REQUIRED.

If the patient doesn't have insurance, click the **Do not add insurance for this patient** box at the top.

- Select the **Subscriber** of the Policy.

- If you select New Person, you will need to manually add that information. This will be the case if one parent is subscriber and another parent is bringing the patient into the office for their exam.

- Subscriber Information Needed:
    - First & Last Name
    - Gender
    - Relationship to Patient
    - Address
    - Carrier Name
    - Subscriber ID or SSN#
    - Group Name/Number [recommended]

- Select the **Insurance Carrier** from the dropdown list.

- Click **Create Record** to save your work when completed.

- The patient will be available in OrthoFi in less than 5 minutes. The Primary Contact will receive new patient forms via text and email.

How to Add Insurance after Importing from Cloud 9

If you receive insurance information for a patient after they have been imported to OrthoFi, make sure to add the insurance policy to OrthoFi for verification!
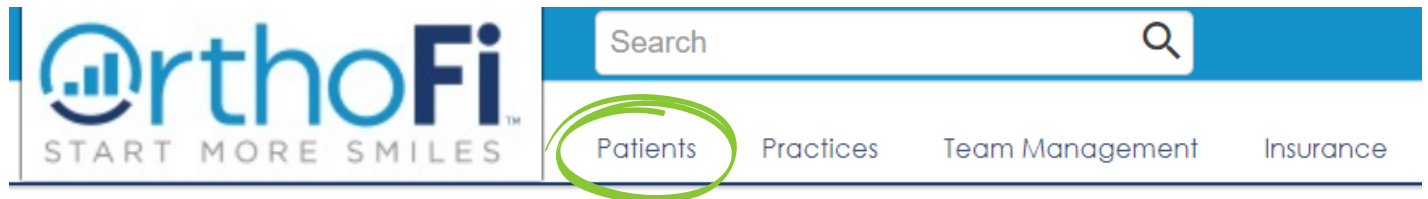
Click on the **Insurance** tab -> Click **+Add New Policy**
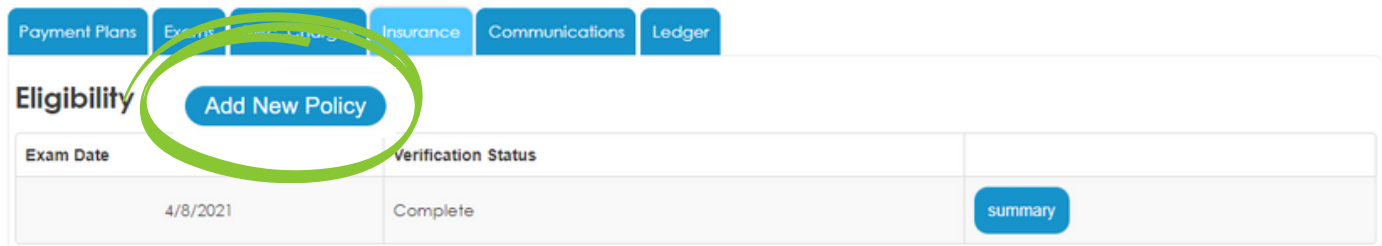
Delinquency Alerts in Cloud 9

OrthoFi Connect features alerts and comments that are added to Cloud9 patient records to let you know when patients are past due on their OrthoFi payment plans. These are accessible by your team and are updated if a patient makes a payment and becomes up to date on their contract.

Alerts appear on Patient Schedule, Patient Check Out, Patient Profile, & Patient Comments.

The alerts in Cloud 9 will include a link that will take you directly to the OrthoFi patient ledger. In order to receive push alerts and comments, the patient must be entered through the OrthoFi Connect integration tool.

Patient Comments - Past Due Account

Patient Comments - Updated Account

Schedule View

Comments & Alerts are updated/added/removed every two hours in Cloud 9.