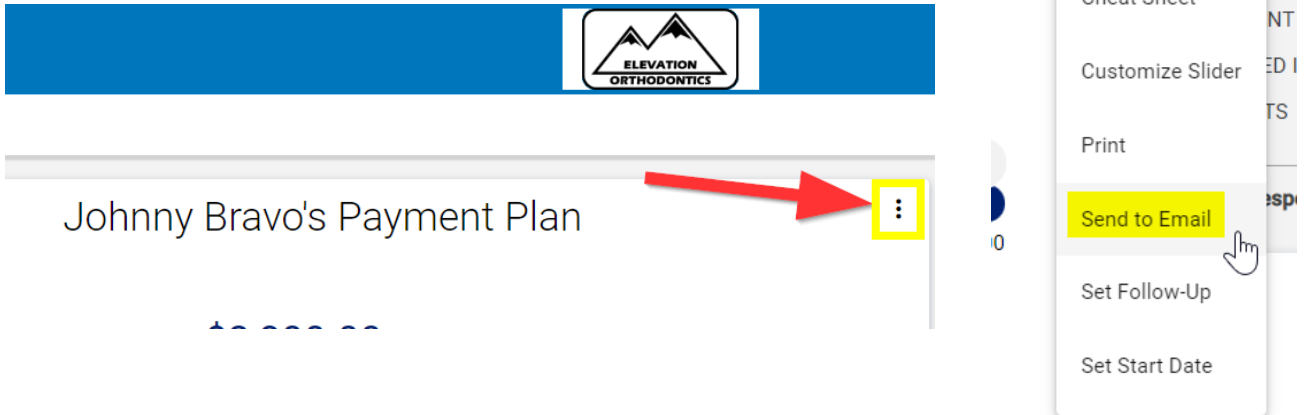


Sign @ Home

This guide details the Sign @ Home functionality and how to clear patients from this filter on your Dashboard.

PRACTICE INSTRUCTIONS: SENDING THE SLIDER HOME

1. From the Slider, click the 3-Dot menu and select "Send to Email."



2. Ensure the Financially Responsible Person's email address is entered. **It is important that the Financially Responsible Person is selecting the payment plan and signing the contract.**

Send to Email

From: support@orthofi.com

Subject: Review Your Payment Options

To:

+ Add Email

Message:

Email Settings

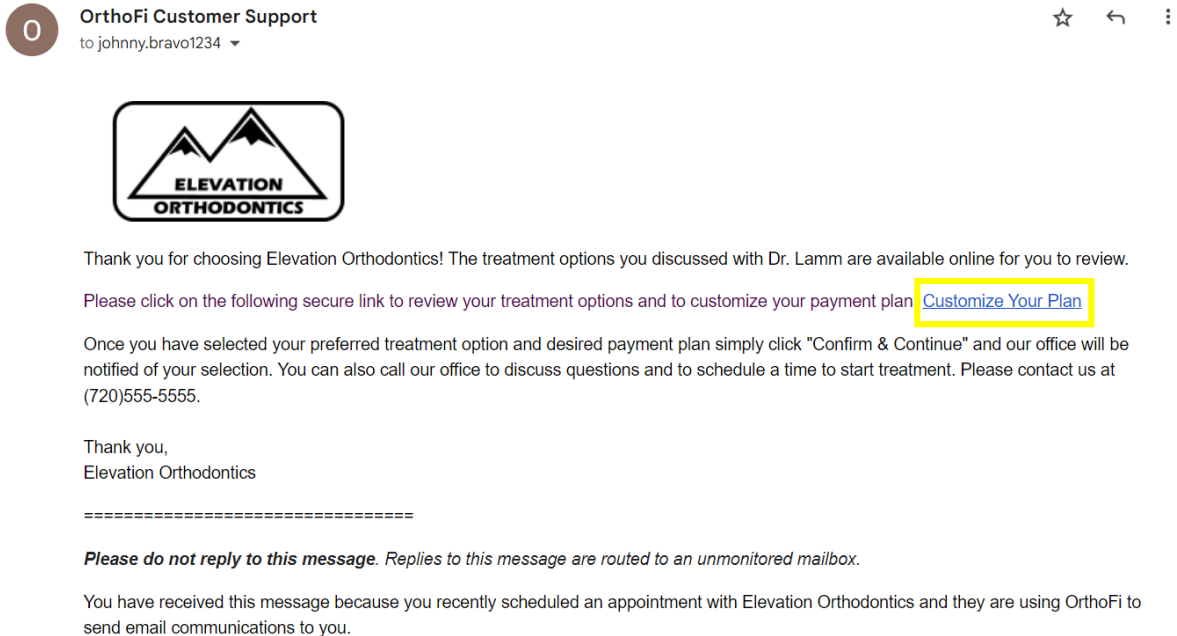
Language: English

What language would you like the email translated to?

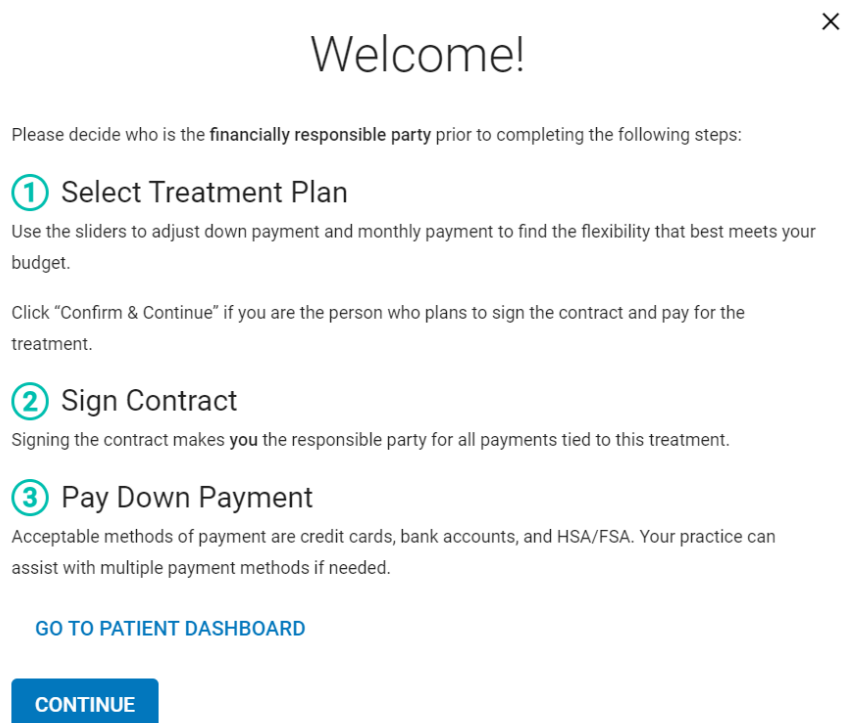
[CANCEL](#) [SEND & SET FOLLOW-UP](#)

FINANCIALLY RESPONSIBLE PERSON'S ACTIONS: REVIEWING THE EMAIL, SELECTING A PAYMENT PLAN, SIGNING THE CONTRACT, AND MAKING THE DOWN PAYMENT

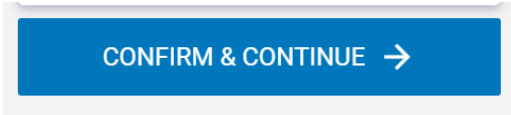
1. Financially Responsible Person to open the email and click the hyperlink.



2. The Financially Responsible Person will be prompted to log in to the OrthoFi account. The pop up message below will appear, instructing them on what to do. Clicking “Continue” will allow them to proceed with the Slider.



- 3. Once the patient has decided on a payment plan, clicking “Confirm & Continue” will bring them to the contract.



- 4. The patient will review and initial the Disclosure Document on the first page. On the second page, the patient will review the Service Contract and type their name as the Signer. Then, the Financially Responsible Person will click to sign the contract.

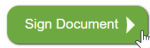
By electronically signing below, I acknowledge that I have read and understand all of the above terms and disclosures:

Signer

Johnny Bravo

Financially Responsible Party: Johnny Bravo

By clicking 'Sign Document' I confirm that this is Johnny Bravo.



- 5. Once signed, the Financially Responsible Person will be prompted to make their down payment. NOTE: There are no rules in place to prevent a patient from closing this screen without making their down payment.
- 6. The Financially Responsible Person will select their down payment amount and click “Go To Payment Method” to make their payment.

Amount Due
\$2,800.00
Due date 11/2/22

Select Payment Amount

- Pay amount due: **\$2,800.00**
- Pay off contract: \$6,500.00
- Pay another amount: \$ 0.00 ?

CANCEL

GO TO PAYMENT METHOD

- 7. The Financially Responsible Person will enter their payment information and make the payment by clicking the blue button.

PAY \$2,800.00 NOW

- 8. After making their payment, The Financially Responsible Person will be able to go back to the patient's account page. The Financially Responsible Person will:
 - a. Receive an email confirming their down payment.
 - b. Be able to review all documents within their account page, as normal.

Payment Successful
Your card ending in 1111 was charged \$2,800.00

Receipt sent to
johnny.bravo1234@orthofi.com

Additional Receipts?
[Send or print receipt](#)

MAKE ANOTHER PAYMENT (highlighted with a red arrow)

[PAYMENT METHODS](#) [BACK TO HOME](#)

OrthoFi Customer Support
to Johnny ▾



Hi Johnny Bravo,

Your payment of **\$2,800.00** (visa 1111) was sent to Elevation Orthodontics. If you have any questions about this payment, please contact OrthoFi at 1.877.766.5220

Charges will appear on your statement as Elevation Orthodontics.

> [Manage your Account](#)

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We respect your privacy. Please review our [privacy policy](#) for more information.

PRACTICE INSTRUCTIONS: CLEARING THE “Sign @ Home” FILTER

1. The patient will appear in the Sign @ Home filter.
 - a. All icons will be **green** if the patient completed all actions: selecting the payment plan (PP), signing the contract (FD), and making the down payment (DP).
 - b. **Red** icons indicate an incomplete action.

The screenshot shows a patient record for Johnny Bravo. The 'Sign @ Home' filter is highlighted with a yellow box and has a red notification icon. The status bar contains icons for P, M, I, CS, PP, FD, DP, and a home icon. The PP, FD, and DP icons are green and highlighted with a yellow box. The 'Action' dropdown menu is visible on the right.

Date	Type	T.C.	Patient	Age	Location	Status	Contacts
	Start / Records	B.S.	Bravo, Johnny	32.10	Denver	P M I CS PP FD DP 🏠	PC Johnny Bravo change pc F Johnny Bravo Action

2. To clear the patient from the filter, set the appliance placement date. Click “Action” >> “Set Appliance Placement Date.” Use the calendar to select the appliance placement date and click “Submit.”

