

Ortho2 Edge Connect - Staff Job Aid

Edge Connect automatically migrates patient and exam data into OrthoFi from Ortho2Edge, and automatically manages your OrthoFi schedule.

Ortho2 Edge Overwrites Information In OrthoFi

Manage all patient and guardian info in Edge only

Patient Information

First / Last Name, Address, Gender, DOB

Billing Party [Family]

First / Last Name, Address, Gender, DOB

If you have multiple patients sharing one Responsible Party, you are required to link the patients to the same Responsible Party Record in Edge. Use the "Family" feature in Edge to link siblings together when scheduling a patient.

Appointment Information

Doctor, TC, Exam Date / Time, Exam Type

Highlighted Fields Automatically Transfer from Edge -> OrthoFi

The screenshot shows the 'Create New Patient' form in OrthoFi. Red boxes highlight the following fields:

- Clinical:** Specialty (PWC), Office (CS), Doctor (Assistant).
- Family:** Click here to add a Family -> + New.
- Biographical (Patient):** First Name (Jennifer), Last Name (Johnson).
- Address (Patient):** 123 Fake Street NW, Smalltown, CO, 123456.
- Biographical (Responsible Party):** First Name (Sarah), Last Name (Johnson), DOB (4/1/1982).
- Contact Info (Responsible Party):** Cell Mom, Email Mom.

Insurance Does Not Transfer to OrthoFi

Adding Patients + Exams in Edge

Ortho2 Edge will automatically create and schedule patients when using pre-selected appointment types. OrthoFi will automatically update to match your Edge schedule.

Schedule Exams in Edge Only

Do not schedule exams or adjust the schedule in OrthoFi

How to Schedule Exams in Ortho2 Edge

Smart Scheduler

Scheduler Button on Homepage

Scheduling an Appointment from a Recall

How to Adjust Exams in Ortho2 Edge

Scheduler Bar / Clipboard

Rescheduled, Missed, Changed

Patient Chart

Missed, Deleted, Cancelled, Changed

Click & Drag Schedule

Rescheduled, Changed

Right Click -> Process Appointment

Missed, Deleted, Cancelled, Changed

Future Exam Scheduled

Today's Exam Result in OrthoFi will change to "Observation" - no further action needed in OrthoFi

Ortho2 Edge "Recalls" are not connected to OrthoFi

OrthoFi Follow-Ups and Edge Recalls do not communicate with each other

Edge Creates OrthoFi Follow-Ups

OrthoFi does not set "Recalls" in Edge, but Edge will automatically set Follow-Ups in OrthoFi. Follow Ups will be set for the same day that any of these actions are taken in Edge:

Exam Cancelled

Exam Deleted

Exam Missed

Schedule Appointments in Edge Only

Do not schedule exams or adjust the schedule in OrthoFi
Ortho2 Edge "Recalls" are not connected to OrthoFi

Adjusting Responsible Parties in Ortho2 Edge

Ortho2 Edge will automatically create Responsible Parties in OrthoFi. OrthoFi will automatically update records anytime a Responsible Party record is changed in Ortho2 Edge.

How to Add / Adjust Responsible Party in Ortho2 Edge

OrthoFi will import the top Responsible Party as the FRP in OrthoFi. Adjust the RP's in Edge to make the desired RP at the top to be OrthoFi FRP.

Start on the Patient's profile -> Click Family -> Edit

Add RP

Remove RP

Create a Family in Edge to Link Siblings Together

Patients sharing the same Responsible Party in Edge must be linked via Edge's Family feature. OrthoFi will import the top Responsible Party as the FRP in OrthoFi. Adjust the RP's in Edge to make the desired RP at the top to be OrthoFi FRP.

Patients & Exams Cannot Be Deleted from OrthoFi

OrthoFi does not have the technical ability to remove patients or exams that were imported from Edge. Deleting an exam in Edge will result in a cancellation in OrthoFi. OrthoFi will match Edge as a historical record, even if you delete the exam in Edge.

Insurance Does Not Transfer to OrthoFi

Edge does not have the ability to export Insurance to OrthoFi. Make sure that all insurance is manually added to OrthoFi after scheduling the patient in Edge.

Edge updates take up to 5 min to reflect in OrthoFi

Visit the Integration Help Center if a patient or exam hasn't been imported by OrthoFi

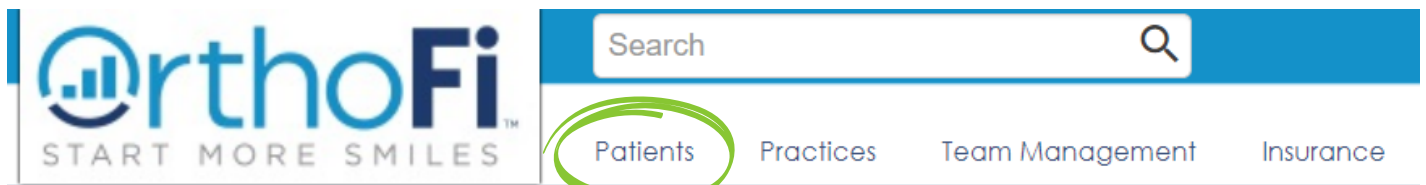
Add Insurance into OrthoFi

Insurance information does not communicate between Edge and OrthoFi, 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.

How to Add Insurance Into OrthoFi

Every patient imported from Edge will have a Patient Detail Page in OrthoFi.

Click Patients -> Use the patient search bar -> Click on Patient



Patients [+ New Patient](#)

Patient Info

Patient Name

Email

Elevation Ortho...

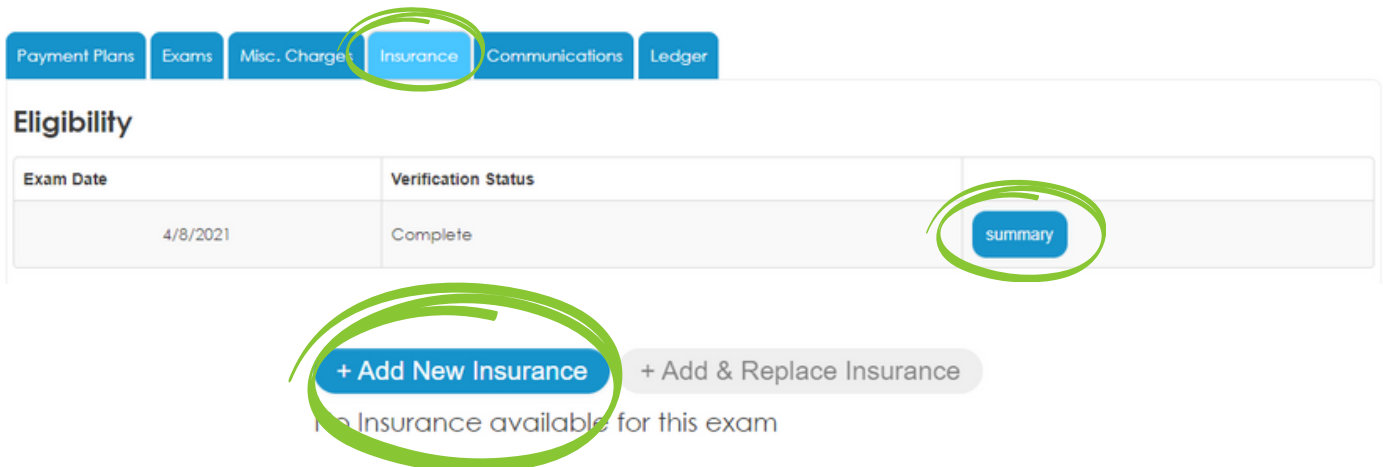
Lone Tree

[Search](#)

Showing 0 of 0 Results

	Age	Location	Status	Additional Details	Upcoming	Follow-Up
No records found						

Click on the Insurance tab -> Click Summary -> Click +Add New Insurance



Ortho2 Edge updates can take up to 5 min to reflect in OrthoFi

Visit the Integration Help Center if a patient or exam hasn't been imported by OrthoFi

Practice Staff Tips & Changes to Workflow

Please ensure that all members of your team have a copy of this guide prior to activating the integration. There will be changes to your daily process and it's important the entire practice staff is aware of them.

Manage Your Schedule in Edge Only

Do not schedule, reschedule, cancel or change exam times in OrthoFi

Once your connection is activated, you will not be able to add patients directly into OrthoFi, they must be added to Ortho2 Edge.

Only Included Exam Codes Will Import to OrthoFi

During the setup process, your practice requested specific New / Observation / Recall Ready / Phase 2 exam codes from Edge to automatically transfer into OrthoFi.

Clinical appointments or post treatment visits where the patient will not see a TC will not import to OrthoFi

Treatment Coordinator

- **Do not add or adjust exams in OrthoFi**
- **Schedule next appointment in Edge only**
- No changes to Tx Details or Slider
- Continue to put Start/Records Date in OrthoFi
- If an Obs patient is ready to schedule their next visit, no exam result is needed - simply schedule the next visit in Edge only.
- If an Obs patient isn't ready to schedule their next visit, enter the exam result in OrthoFi and set a Follow Up Date in OrthoFi.

Front Desk

- **Do not add or adjust exams in OrthoFi**
- Collect Guardian DOB on new PT call
- Manage the schedule in Edge only
- Update PT/Guardian info in Edge only
- Enter insurance into OrthoFi

Misc. Charges

- Search for patient in OrthoFi
- All patients from Edge are added to OrthoFi when the connection is activated.

Use the Integration Help Center in OrthoFi

The Integration Help Center Button will appear in OrthoFi when your integration is activated. This resource lets you search for patients from Edge, Import any patient or exam that didn't automatically pull over, and view connection status.

Need to request changes to your appointment settings, staff, or doctors?

[Implement.OrthoFi.com/Integration-Updates](https://implement.orthofi.com/integration-updates)

Treatment Coordinator Flow Chart

There will be changes to your exam process - this outlines the steps to take during exams.

Manage Your Schedule in Edge Only

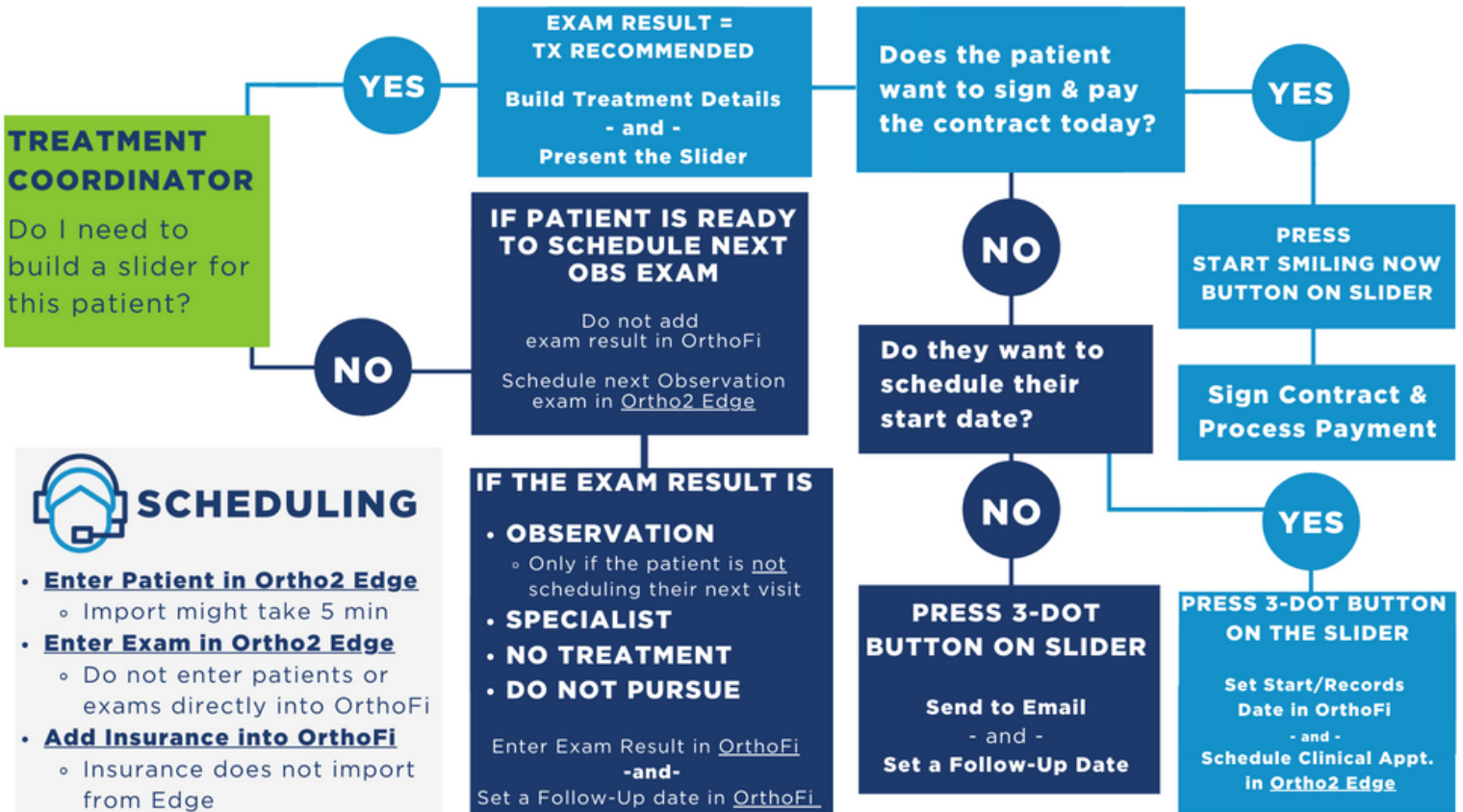
Do not schedule, reschedule, cancel or change exam times in OrthoFi

TC Need-to-Know's

- **Only recommend treatment if the patient is ready to start**
- Schedule next appointment in Edge only
- Edge Recalls do not connect to OrthoFi
- OrthoFi Follow-Ups do not connect to Edge
- There are no changes to Insurance process, Treatment Details, or Slider
- Continue to put Start/Records Date in OrthoFi via slider or Action button

Observation Patients

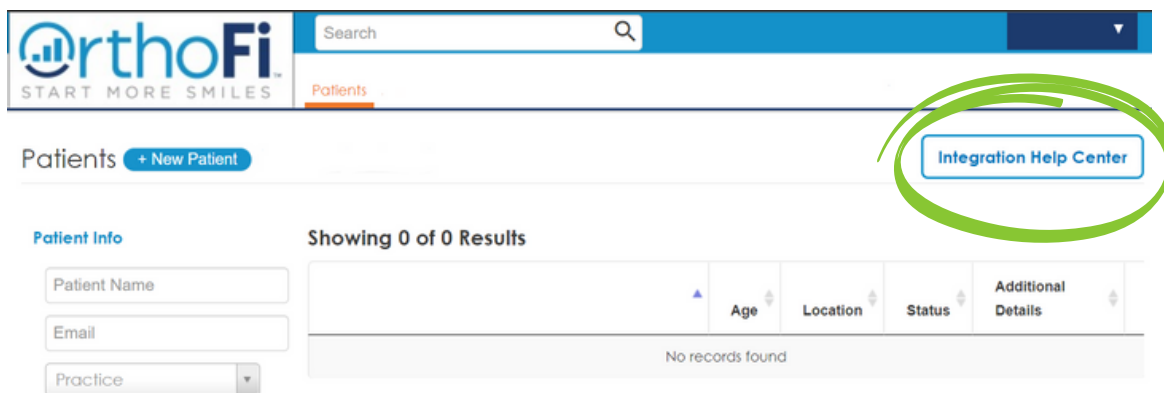
- If an Obs patient is ready to schedule their next visit, no exam result is needed - simply schedule the next visit in Edge only.
- If an Obs patient isn't ready to schedule their next visit, enter the exam result in OrthoFi and set a Follow Up Date in OrthoFi.



Integration Help Center

What does the Help Center do?

- Check connection status to determine if Edge is communicating to OrthoFi
- Search for Patients to location appointment history, Patient ID, and DOB
- Import Patients that didn't automatically import
- View detailed appointment history to see how Edge and OrthoFi appointments are connected to each other.
- Check to see if any information in OrthoFi was manually-adjusted causing a mis-match between the two systems.



Access the Help Center

Look for the Help Center button on the upper right side of the Patient Detail Page and the Patient Search Page in OrthoFi

Check Your Connection Status

Select the practice and location -> press the [Get Integration Status](#) button

Connection to Practice Management Software

Select Integration
Matt's Practice

Select Location
Smith Jones Orthodontics - Drs. Smith and

GET INTEGRATION STATUS



The OrthoFi - Ortho2Edge connection is working as expected.

Reconnect to OrthoFi

If your connection is down, please contact Ortho2 at Development@Ortho2.com

Patient Record Search & Import

Enter a patient's full name with no additional spaces and press the search button.

Search for Patients & Exams in Practice Management Software

Patient Name
 SEARCH

	First Name	Last Name	Patient Status	Location	DOB	Created On	Created By	Patient ID
Dolphin	Happy	Patent	set	Denver	04/01/10	4/28/21	N/A	bc2b441c-d2e2-48e2-b326-23...
OrthoFi	Happy	Patient	N/A	Denver	04/01/10	4/28/21	Integration	123456

If a patient makes changes to any information while completing forms, it will display in red. This could be a name misspelling or incorrect date of birth. This does not automatically update back to your Practice Management Software.

Review Appointment History

The area under Associated Exams shows you the appointment history that Dolphin or Ortho2Edge is communicating to OrthoFi. You can see when the record was created and who created it. It also provides ID numbers for Support.

An exam that is linked between your Practice Management Software and OrthoFi will have matching lines, representing both softwares. If there is no linked exam, that means the appointment code is Excluded from the OrthoFi connection.

Associated Exams

▼ Filter Exams ▼

Displaying 8 of 8 exam(s)

	Date	Type	TC	Doctor	Location	Status	Created On	Created By	Appointment ID
Dolphin	5/10/21, 8:00 A...	New Patient Exa...		Smith	Denver	Checked Out	4/28/21	N/A	8df038be-75fe-4...
OrthoFi	5/10/21, 8:00 A...	New	Kim	Smith	Denver	Treatment Reco...	4/28/21	Integration	1786101
Dolphin	6/22/21, 8:00 A...	Invisalign 4 unit ...		Smith	Denver	Checked Out	6/14/21	N/A	b0943b35-0a96-...
OrthoFi	🔗 No Linked Exam								

If a required field such as TC, Doctor, or Location is missing in your Practice Management Software, it will display in Red. The exam will import using your system Defaults which are established during the initial connection setup.

Financial & Delinquency Features

OrthoFi Connect financial alerts are added to Ortho2 Edge patient records to let your team know when your patients are past due on their OrthoFi payment plans. The alerts are updated automatically when the patient makes a payment and becomes up to date on their contract. Please note that OrthoFi will only send these once per each delinquency. If the alert is deleted before the contract is up to date, the integration does not send another alert until the contract is brought current then past due again.

OrthoFi Alert & Comments in Ortho2 Edge

