



OrthoFi Integration Setup in Dolphin

Congratulations on your upgrade to OrthoFi Connect! There are a few steps you need to take in order to get your practice ready to launch integration in Dolphin.

This will require you to access every computer with Dolphin in the practice where you plan to use OrthoFi. Most practices tell us it takes about 30 minutes to complete these steps.

This guide will teach you how to:

1. Authorize the OrthoFi Integration in [Anywhere Dolphin](#)
2. Allow notifications from [Dolphin Management](#)
3. Create the Financial Alert in [Dolphin Management](#)
4. Create the Ledger Link in [Dolphin Management](#)

Need Help?

These setup steps happen in AnywhereDolphin and Dolphin Management. You will need to have appropriate permissions in Dolphin Management to be able to complete these setup steps. Dolphin Support is able to help with this process or if you run into any error messages.

1-800-548-7241

5:00 AM - 6:00 PM

Weekdays [Pactific Time]

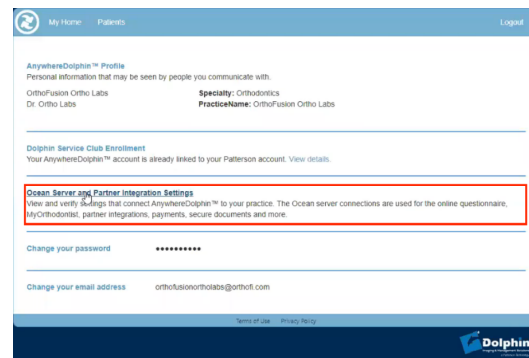
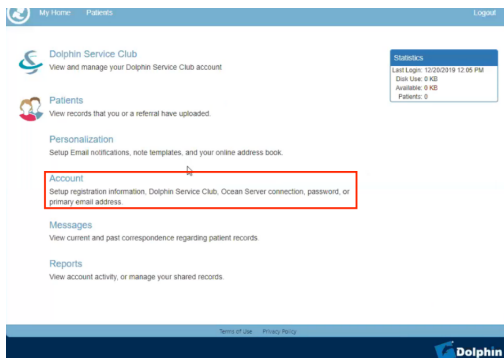
OrthoFi's call center is not able to assist with the Dophin setup process.

Please contact Integrations@OrthoFi.com

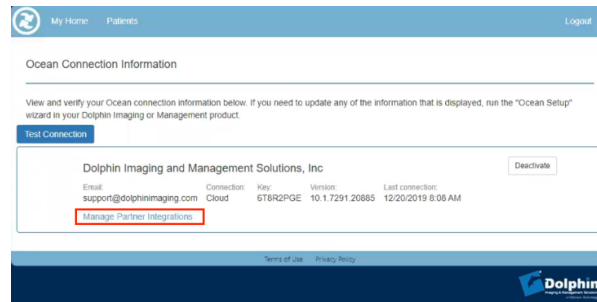
Authorizing the OrthoFi Integration in AnywhereDolphin

Before we can get started with setting up your integration, you must authorize OrthoFi access through the AnywhereDolphin website. This initial step is what gives OrthoFi access to your Dolphin services.

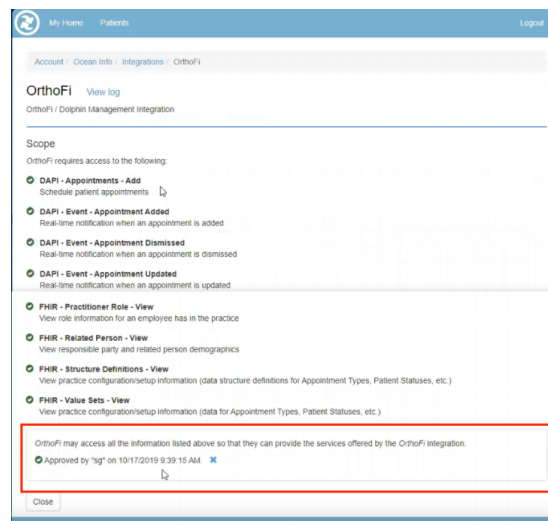
- 1 - Log in to AnywhereDolphin and navigate to the Account section.
- 2 - Select Ocean Server and Partner Integration Settings.



- 3 - From the Ocean Connection Information screen, select Manage Partner Integrations.



- 4 - Select the OrthoFi integration.
- 5 - Scroll to the bottom and approve the integration

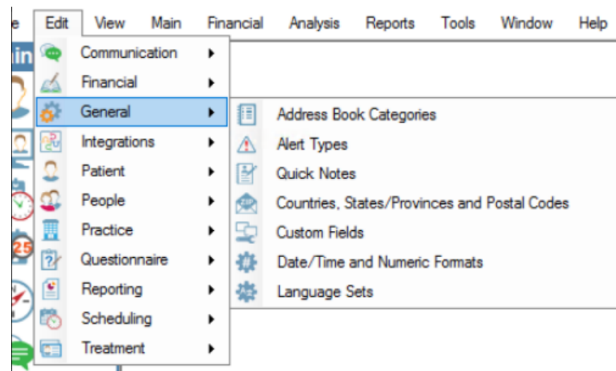


Add an OrthoFi Financial Alert to Dolphin Management

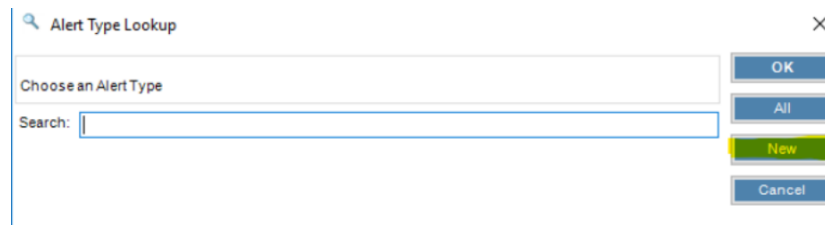
Please login to Dolphin Management and setup a new Financial Alert for OrthoFi to use.

ALERT SETUP:

To setup the alert, under the Edit tab, select General and go to the Alert Types

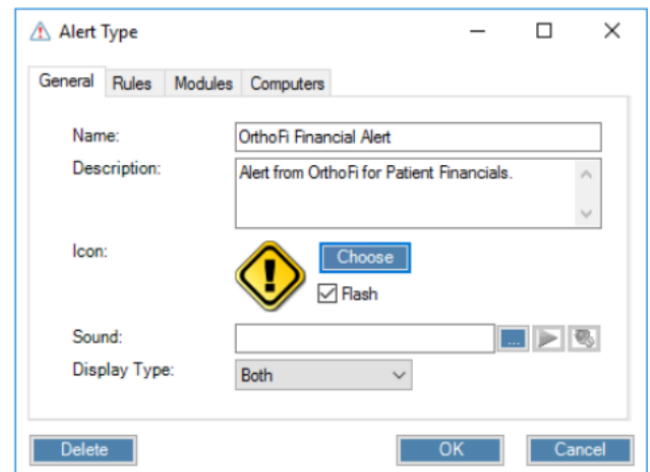


Select New and an Alert window will appear.



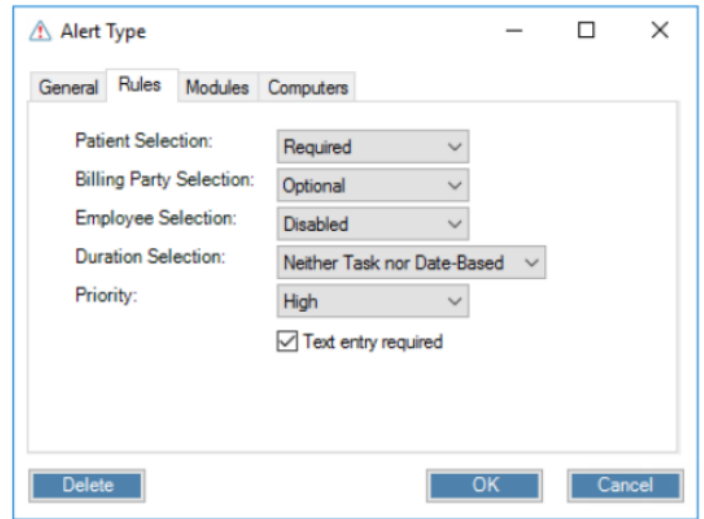
Start on the General tab in the Alert Type box:

- Name
 - **OrthoFi Financial Alert**
The name must be in the exact format as shown above
- Description - Alert from OrthoFi for Patient Financials.
- Icon - Select Choose, then the Custom radio button
- Icon - Select OK
- Sound - N/A
- Display Type - Bot



Next, select the Rules tab

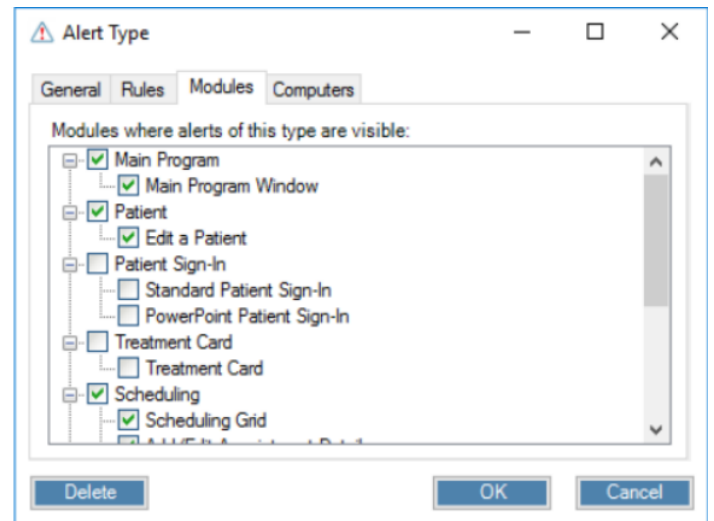
- Patient Selection - Required
- Billing Party Selection - Optional
- Employee Selection - Disabled
- Duration Selection - Neither Task nor Date-Based
- Priority - High
- Select the checkbox for “Text entry required”



Next, select the Modules tab and select ONLY the following:

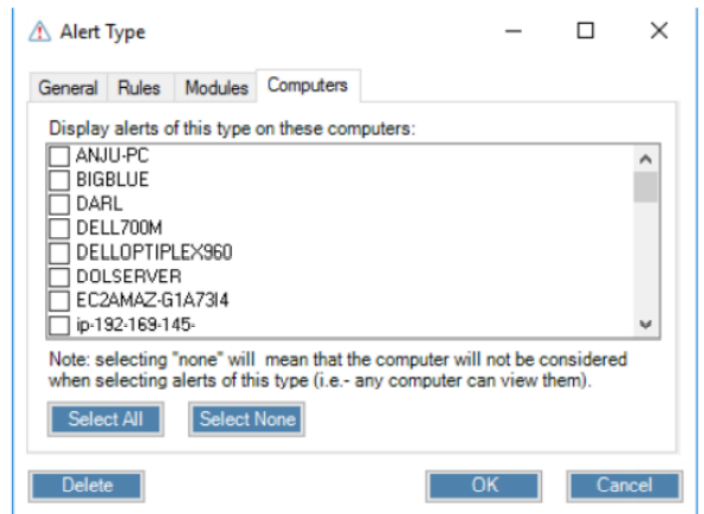
- Main Program/Main Program Window
- Patient/Edit a Patient
- Scheduling/Scheduling Grid/Add/Edit Appointment Details
- Checkout Wizard/Checkout Wizard

Make sure all other modules as unselected



Last, under the Computers tab make sure no computers are selected.

- Once confirmed, click OK.



NEED HELP?

Ask Dolphin Support for help with creating a Financial Alert in Dolphin Management.

1-800-548-7241
5:00 AM - 6:00 PM
Mon - Fri [PT]

Create an OrthoFi "Ledger Link" Button in Dolphin

As part of the Financial Delinquency feature, you will have an OrthoFi button in Dolphin Management. The button link will let you navigate directly to the patient's OrthoFi ledger without needing to change browser or login again.

HOW DOES IT WORK?

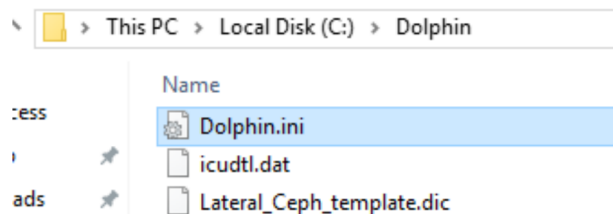
- OrthoFi button will be in the Favorites section of Dolphin Management in the left navigation bar
- When a patient's profile is displayed in Dolphin, it will take you to that specific patient in OrthoFi
- When no specific patient's profile is displayed, it will take you to OrthoFi patient search.

BEFORE YOU BEGIN:

- Before starting these changes, **make sure that Dolphin Management is closed.**
- This link must be installed on every PC where you intend to use OrthoFi.

STEP 1 - CREATE A LINK FOR THE BUTTON TO CLICK ON

- Open C:\Dolphin or C:\Windows
- Locate the Dolphin.ini file - the file name may also just be "Dolphin" with a "Configuration Settings" file type



- Right click on Dolphin.ini -> open with Notepad (you may have to select Edit)
- Scroll to the very bottom of the file, or search the file for "Toolbar."
- You are looking for: [Toolbar]
- Paste the **orange text** below under the [Toolbar] section in Notepad.

OrthoFi=OrthoFi,Launch OrthoFi for a patient,C:\Dolphin\Buttons\orthofi.bmp,explorer"https://api.orthofusion.orthofi.com/dolphin/redirects/patientLedger/{PatientGUID}"

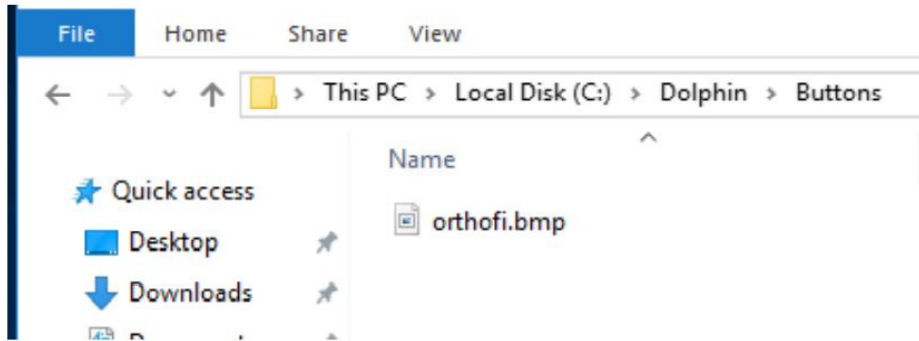
The Toolbar section in Notepad will look like the screenshot below - make sure there are no additional spaces or periods when copy/pasting into Notepad. Any deviation from the code above will result in a non-functional button.

```
MISC 13-34,MISC 2, PIC 7,040,480,C  
Undigitized Arch=56,MISC 2, PIC 8,640,480,C  
[Toolbar]  
OrthoFi=OrthoFi,Launch OrthoFi for a patient,C:\Dolphin\Buttons\orthofi.bmp,
```

STEP 2 - ADD THE ORTHOFI LOGO TO THE BUTTON

Now that the link is added, we need a logo to go with it.

You will need to drop the [orthofi.bmp](#) file from Dropbox into [C:\Dolphin\Buttons](#) directory.



If the Buttons folder does not exist, you will need to create one. Dolphin Support can assist with this process if you don't already have a Buttons folder.

Finally, restart Dolphin Management to create an "Integrations" group in the main toolbar on the left side.

Right-click and add your new icon to a "Favorites" group so it is one-click away.

You are all done!



The Ledger Link Button in Dolphin will not be active until your integration launch date.

Clicking on it prior to launch will result in Google Chrome opening and displaying an error message.

NEED HELP?

Ask Dolphin Support for assistance with creating the OrthoFi "Ledger Link" Button in Dolphin Management.

1-800-548-7241

5:00 AM - 6:00 PM

Mon - Fri [PT]