

## Dolphin Connect - Staff Job Aid

Dolphin Connect migrates patient and exam information into OrthoFi from Dolphin, saving your staff time from double-entry and scheduling. Dolphin Connect also gives you visibility of your past due OrthoFi accounts in Dolphin.

### Dolphin Overwrites Information in OrthoFi

Dolphin will override OrthoFi. Manage all patient and guardian information directly in Dolphin because it will overwrite what's in OrthoFi. OrthoFi imports the following fields:



The screenshot shows the 'Add a Patient' form with the following sections highlighted in red:

- Patient:** First/Last: Chris Farley, Greeting: [empty], Street: 1000 Main, City: Denver, State: CO, Zip: 80210, Birthdate: 01/01/2008 (12 yrs), Gender: Male, Email: [empty], Phone #s: [empty]
- Billing Party:** Salutation: Mr., First/Last: Cory Farley, Relationship: Father, Greeting: [empty], Street: 1000 Main, City: Denver, State: CO, Zip: 80210, Email: coryf12938@orthofi.com, Phone #s: Mobile (111) 111-1112
- Orthodontist & Location:** Location: OrthoFi, Orthodontist: Doctor, Jon, Assistant: TC, Jon

#### Patient Status

#### Patient Information

First/Last Name, Address, Gender, DOB

#### Billing Party(ies)

First/Last Name, Address, Gender, DOB

#### Appointment Information

Doctor, TC, Exam Date, Exam Time, Exam Type

### Insurance Does Not Transfer to OrthoFi

Enter Insurance directly into OrthoFi - Instructions on Page 5

## Dolphin Controls OrthoFi's Schedule

Dolphin will automatically schedule patients when using pre-selected appointment types. OrthoFi will automatically update to match your Dolphin schedule.



**Patient Created**  
**Exam Scheduled**  
**Exam Rescheduled**  
**Future Exam Scheduled**

Dolphin updates today's OrthoFi exam result to Observation when a future exam is scheduled

## Dolphin Creates OrthoFi Follow-Ups

OrthoFi doesn't set Follow Ups in Dolphin, but Dolphin will automatically set Follow-Ups in OrthoFi. Follow Ups will be set for the same day that any of these actions are taken:

**Exam Cancelled**  
**Exam No-Show**

## Schedule Appointments in Dolphin Only

**Do not adjust the schedule within in OrthoFi, always use Dolphin**

This will lead to duplicate appointments, delays in eligibility services, multiple messages to patients, and incorrect reporting in OrthoFi.

## Patients & Exams Cannot Be Deleted from OrthoFi

OrthoFi does not have the ability to remove patients or exams that were imported from Dolphin. OrthoFi will match Dolphin as a historical record and cannot be edited.

**Dolphin 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

# Dolphin Scheduling Requirements

Make sure the Patient Status is set. There are required fields in Dolphin that your staff must complete in order for the integration to function properly. The integration will not function properly unless all of these fields below are completed in Dolphin.

## Billing Party Linked

*Click here to link*

If you have multiple patients sharing one Billing Party, you are required to link the patients to the same Billing Party Record.

**You cannot have Billing Parties with duplicate records in Dolphin. Make sure to link families to the same Billing Party.**

## Orthodontist & Location

\*If no Doctor added in Dolphin, exam will import under the practice's Default Doctor

## Billing Party Birthdate

## Treatment Coordinator

\*If no TC added in Dolphin, exam will import under the practice's Default TC

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## Practice Staff Tips & Changes to Workflow

Dolphin Connect will simplify your practice's operations, but if you're adding Connect as a current OrthoFi customer, there will be some slight changes to your office workflow which your team will need to familiarize themselves with prior to launch.

### Manage Your Schedule in Dolphin Only

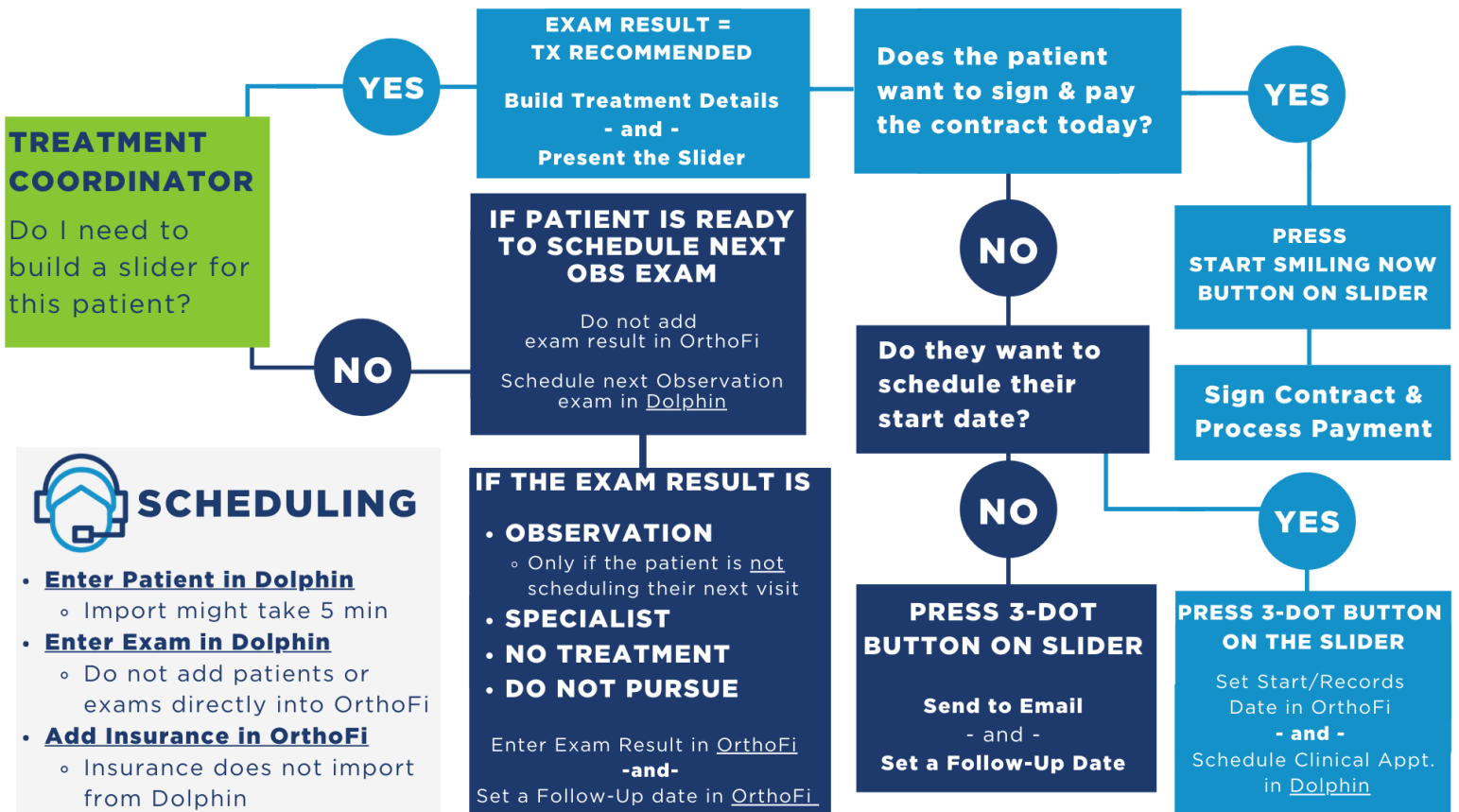
**Do not add patients into OrthoFi or adjust the schedule within OrthoFi**

#### Front Desk

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

#### Treatment Coordinator

- **Do not add patients or exams into OrthoFi**
- No changes to Tx Details or Slider process
- Schedule next appointment in Dolphin only
- If an Obs PT is not ready to schedule next appt, enter the exam result in OrthoFi and set a Follow Up Date in OrthoFi.



#### **SCHEDULING**

- **Enter Patient in Dolphin**  
◦ Import might take 5 min
- **Enter Exam in Dolphin**  
◦ Do not add patients or exams directly into OrthoFi
- **Add Insurance in OrthoFi**  
◦ Insurance does not import from Dolphin

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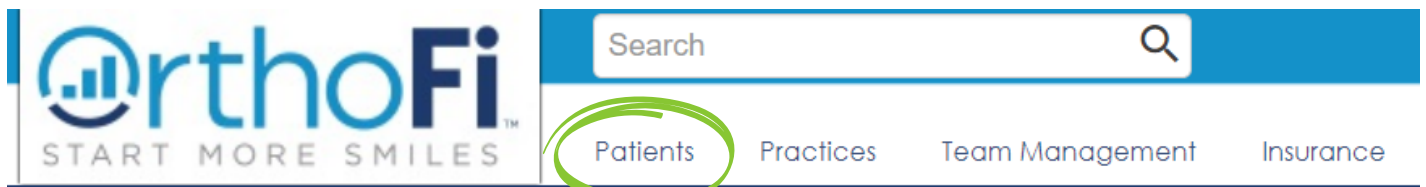
## Add Insurance into OrthoFi

Insurance information does not communicate between Dolphin 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 Dolphin 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**

Payment Plans Exams Misc. Charges **Insurance** Communications Ledger

#### Eligibility

Exam Date	Verification Status
4/8/2021	Complete

[summary](#)

[+ Add New Insurance](#)

[+ Add & Replace Insurance](#)

No Insurance available for this exam

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## Financial & Delinquency Features

OrthoFi Connect financial alerts are added to Dolphin 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.

### OrthoFi Ledger Link Button in Dolphin

An OrthoFi button will be available in Dolphin to connect you to the patient's Ledger without needing to change screens, login to OrthoFi, and search for the patient. The Button lives in Favorites section of Dolphin in the left navigation bar.

**The icon must be installed individually onto each PC using Dolphin.**

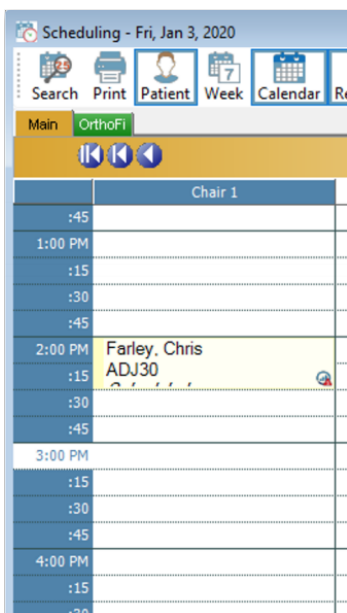
When a patient's profile is displayed in Dolphin, it will take you to that patient in OrthoFi. When no patient's profile is displayed, it will take you to OrthoFi's patient search page in Google Chrome.



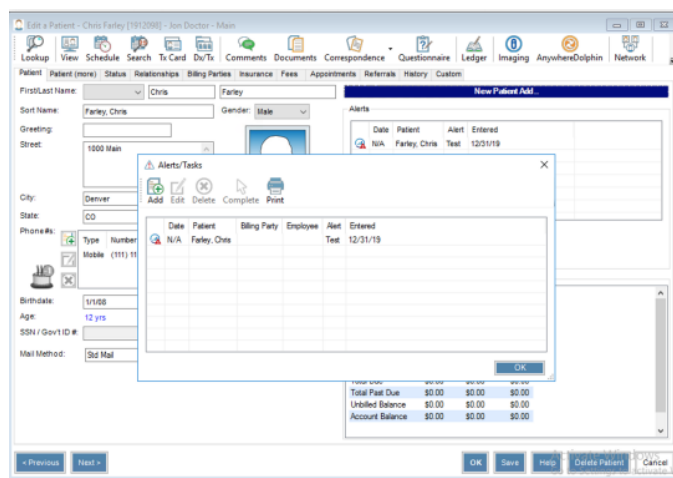
### OrthoFi Alerts & Comments in Dolphin

The delinquency alert icon will appear in four areas: Practice Schedule, Patient Profile, Patient Alerts, & Checkout Wizard.

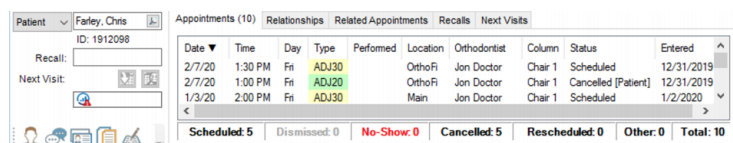
**Do not add patients directly into OrthoFi, always use Dolphin.**  
**Patients that are manually created in OrthoFi will not receive alerts.**



**Practice Schedule**



### Patient Profile & Checkout Wizard



### Patient Schedule / Patient Bar