

Financial Coordinator Responsibilities

Starts Report

- Click the **Reports** tab on the Dashboard
- Click the **STARTS PERFORMANCE** tab and select “Starts”
- Select the time period you would like to run for the report
- Click **Run Report**
- The report displays details of “Starts” (contract signings) in that period (production)

Day Sheet Report – End of Day Process

- Click the **Reports** tab on the Dashboard
- Click the **COLLECTIONS** tab and select “Day Sheet”
- The report defaults to today's date – If you need to see a different date range – Click the the date field and set a “Custom Range”
- Click **Run Report**
- Review the amounts collected in office
- Click **EXPORT PDF** to download a file
- Open the PDF file and print it
- Go to the bank and deposit the “Day Sheet” amount (separately from your Practice Management Software collections)
- Staple the deposit receipt to the Day Sheet PDF for your bookkeeper

Collection Detail Report

- Click the **Reports** tab on the Dashboard
- Click the **COLLECTIONS** tab and select “Collections Details”
- Select the desired time period for the report
- Click **Run Report**
- The report displays all collections details
- If you select **Next Ortho! Deposit Date** in the **Payment Date** field you will see the collections that will be deposited into the practice account on the next Friday deposit date

Delinquent Report

- Click the **Reports** tab on the Dashboard
- Click the **ADMIN** tab and select “Delinquent”
- Click **Run Report**
- The report displays all “Delinquent Accounts”
- Scroll to the left and review the **Active Payment Method(s) on File** column, if no method is on file – Contact the Financially Responsible Party for a new payment method
- Review the **Valid Email on File** column, if no email is on file – Contact the Financially Responsible Party to gather an email address and confirm contact information
- Review the **Recommended Action** column at the far right of the Delinquent Account table:
 - “Recommended Actions” follow OrthoFi’s Standard Collection Protocol for accounts reaching 45-52 days, 91 days, 121 days, and 181 days delinquent
 - Note the “Recommended Action” and follow up with the Financial Responsible Party as appropriate

Truth In Lending Messaging



“You were offered a paid in full discount of X% or \$XX.XX, which you elected not to utilize.

Federal regulations require us to present this forgone discount to you as a finance charge even though we have not changed the terms of the payment plan that you selected.

Finance charges must be presented in dollar amount and percentages so the \$XX.XX represents X% APR over the length of your selected payment plan. This finance charge **is not an additional cost to you**, it is simply the pay in full discount that you elected not to take.”

Splitting or Deferring the Down Payment

If the patient objects to full payment of the DP today, it can be deferred or split into 2 payments

- Click **START SMILING NOW** →
- Click **Flexible Plan** at the top of the Disclosure Document
- Click the **Split Down Payment** button
- Enter the **Down Payment 2 Amount** \$ 612.50 and **Down Payment 2 Date** this automatically calculates the DP due today – To defer the DP – Enter the full amount as the **Down Payment 2 Amount**
- If you need to push out the date of the 1st monthly payment – Enter the new date in the **Make First Payment On** field
- Click the **Next** button
- Click **Save Changes** after reviewing the new Payment Schedule
- Sign the contract and collect the portion of the Down Payment Due today – If applicable
- Click **Payment Plan Summary** on the Confirmation Details page
- Scroll down to the Auto-Pay Methods section
- Click **Add Payment Method**
- Enter payment details and click **Add Payment Method**
- The 2nd Down Payment will be collected automatically on the date you have set

Take a Patient Payment

- Search for the patient
- Click the **Payment Plans** tab
- Click **Action -** and select “View Payment Plan”
- Click the **Pay Invoice** or **Make Payment** button
- Select or set the Payment Amount
- Click **GO TO PAYMENT METHOD**
- Select a Payment Method
- Click the **PAY \$254.35 NOW** button
- A receipt will be automatically emailed

Restructuring Contracts

To Restructure the Terms of a Signed Contract

- Search for the patient
- Click the **Payment Plans** tab
- Click **Action -** and select “Manage Invoices”
- Click the **Edit** button
- Change the terms as required

Sign@Home Follow Up: Set Appliance Placement Date

When a patient signs the contract at home you need to set the Appliance Placement Date

- Click the **Start @ Home** filter
- Click the **Action -** button and select **Set Appliance Date**
- Select the date and click the **Submit** button

Review Resource Center Messages

- Click the Resource Center Megaphone:
 - To View Product Updates
 - Access Training and Support
 - To Share Your Feedback



Create a Miscellaneous Charge

For a Patient already in OrthoFi

- Search for the patient
- Click the **New Misc Charge** button
- Enter the miscellaneous charge information; who is paying, what they are getting, quantity, etc.
- Click **Pay in Full** or **Pay in Installments** as appropriate
- Select or set the Payment Amount
- Click **GO TO PAYMENT METHOD**
- Select a Payment Method
- Click the **PAY \$254.35 NOW** button

For a Patient Who is Not in OrthoFi

- Create the patient in OrthoFi:
 - Under the **Exam Details** check the box for This person does not need an exam
 - Click the **CREATE PATIENT** button
- Follow the steps above to add the miscellaneous charge

OrthoFi Does Not Verify Estimated Insurance Benefits for Miscellaneous Charges

Extended Financing Messaging



“You’ll notice on the monthly payment slider that there is a blue zone.

If you need a plan that is more flexible you can choose to extend your payment plan into this zone, you will incur a small interest charge.

The interest will start calculating in the first month of your payment plan.”

Pending Patient & Scheduled Start Patient Set Up

Pending/Scheduled Start patients have see fees on paper and will be returning and signing their contract in OrthoFi once they arrive at the office. During this transition period you have two options for entering patients in OrthoFi’s system to set up their contract.

- **Option 1 (recommended): Patient Creation:**
 - Inform the patient that you have partnered with OrthoFi and need to collect an updated medical history and patient information
 - Inform them that they will receive an email and/or text from OrthoFi with a link to update their patient forms within the new system
 - After speaking with the patient, create the patient in OrthoFi following the standard New Patient Creation process
 - Ensure that the Exam Date & Time matches what is currently set up as the day the patient will start treatment and sign their contract
 - Click **CREATE PATIENT**
 - Add Insurance information if applicable
- **Option 2: Quick-Start** – For patients who need to sign a contract, but you would not like to send OrthoFi’s forms to be completed (**NOTE:** Using this option, you will not have patient information or medical history within OrthoFi):
 - Create the patient in OrthoFi following the standard New Patient Creation process
 - Ensure that the Exam Date & Time matches what is currently set up as the day the patient will start treatment and sign their contract
 - Unselect the forms communication options for email and text messages Email Text Message
 - Click **CREATE PATIENT**
 - Add Insurance information if applicable