

Dashboard Management (Integrated)

How to properly manage each filter on the OrthoFi Dashboard when using Dolphin or Ortho2 Edge

Needs Attention

Patients that require action on their account

To prevent a patient from appearing in the Needs Attention filter, an Exam Result must be selected in Dolphin/Edge or from the Action menu for each patient in the 'Today' filter. The 'Today' filter should be clear at the end of each day.

In the "Reason" column, review why the patient appears in the Needs Attention filter and take proper action.

Reasons:

- **Exam Result Incomplete:** The patient's exam date has passed, and an exam result has not been entered in your PMSW.
 - In your PMSW:
 - **Reschedule** - Reschedule the exam in your PMSW and exam will automatically reschedule in OrthoFi
 - **No Show** - Mark the exam as a No-Show in your PMSW. A follow-up will automatically be created in OrthoFi.
 - **Cancel** - Mark the exam as Canceled in your PMSW. A follow-up will automatically be created in OrthoFi.
 - **Observation** - The patient is not yet ready for treatment.
 - **If the patient has a future exam:** Schedule the exam in your PMSW
 - **If the patient does not have a future exam:** In OrthoFi, **Action > Observation > Set Follow-Up** to be reminded to schedule a future appointment.
 - **No Treatment** - Patient does not need full treatment OR only needs a miscellaneous charge
 - In OrthoFi, **Action > No Treatment**
 - **Specialist** - Patient needs to see a specialist before treatment can be recommended.
 - In OrthoFi, **Action > Specialist > Set Follow-Up** to be reminded to schedule a future appointment.
 - *If the patient's exam is a duplicate and you would like it removed completely, contact Customer Support (877) 766-5220 or support@orthofi.com*
- **Treatment Recommended, No Follow Up Set:** The slider has been presented to the patient, but follow-ups have not been set.
 - If the Automated Follow-Up Campaign will be used, click the patient's PP icon. When you arrive at the slider, click the 3-dot menu and either:
 - Select **Send to Email**, click Send + Set Follow Up and choose Automated Follow-Ups

- Select **Set Follow-Up** and choose Automated Follow-Ups
 - If you would like to set a one-time manual follow-up, click **Action > Set Follow-Up**
 - If the patient chooses to not proceed with treatment, click **Action > Decline Tx**
 - If you would like to cease communication with your patient, click **Action > Do Not Pursue**
- **In Obs, No Follow Up Set:** Patient Exam Result was set to Observation, but a follow-up has not been set.
 - If the patient has not yet scheduled a future appointment, click **Action > Set Follow-Up** for the date you would like to be reminded to reach out to the patient to schedule.
 - If the patient has a future appointment, schedule in your PMSW.
- **Unable to Verify Insurance:** OrthoFi's Eligibility Team could not verify insurance benefits based on the current information (indicated by an orange "I" icon).
 - Click into the orange "I" icon and review the reason as to why OrthoFi's Eligibility Team was unable to verify the patient's insurance policy.
 - Reach out to your patient to review the information that was provided.
 - **To update insurance information:**
 - Click **Edit Policy**, change any incorrect fields, and click Save. This has now been sent to OrthoFi's Eligibility Team for re-verification.
 - **If the policy is no longer active:** Click 3-dot menu > Remove Policy

Follow-Up

A pending patient management filter indicating to reach out to your patient

In the Follow-Up Type column, review the reason for follow-up and take proper action. The recommended Actions below will remove your patient from the Follow-Up filter.

Follow Up Types:

- **[Auto Follow-Up: Call Reminder] Treatment Recommended:** Patient is enrolled in Automated Follow-Up Campaign. This is a reminder to call your patient. You will see this follow-up 3 and 30 days after the Automated Follow-Up Campaign was initiated.
 - From the Action button:
 - **Complete & Log Communication** - Make a note about what was discussed with patient
 - **Schedule Future Appt** - DO NOT USE. Schedule appointment in your PMSW
 - **Set Follow-Up** - Schedule a future follow-up on the next date you would like to reach out to your patient. Keep in mind that your patient is enrolled in Automated Follow-ups.
 - **Stop Auto Follow-Ups** - Patient has requested to stop receiving automated follow-ups. Please note, this patient will appear in your Needs Attention filter reminding you to set a manual follow-up.

- **Remove Follow-Up Date** - Enter removal reason (optional)
 - **Decline Tx** - If the patient chooses to not proceed with treatment
 - Click patient's name > Exams tab > Action > Decline Tx
 - **Do Not Pursue** - If you would like to cease communication with your patient
 - Click patient's name > Exams tab > Action > Do Not Pursue
- **Treatment Recommended:** Patient has been presented slider and a manual follow-up was set. Staff should contact the patient to review their payment plan options and see if they have made a financial decision.
 - From the Action button:
 - **Schedule a Future Appt** - Input Start/Records date and time
 - **Set Follow-Up** - Schedule a follow-up to reach out again at a future date
 - **Remove Follow-Up Date** - Enter removal reason (optional)
 - **Decline Tx** - If the patient chooses to not proceed with treatment
 - Click patient's name > Exams tab > Action > Decline Tx
 - **Do Not Pursue** - If you would like to cease communication with your patient
 - Click patient's name > Exams tab > Action > Do Not Pursue
 - **Cancel or No Show:** Staff should contact the patient to reschedule the missed appointment.
 - From the Action button:
 - **Schedule a Future Appt** - DO NOT USE. Schedule appointment in your PMSW
 - **Set Follow-Up** - Schedule a follow-up to reach out again at a future date
 - **Do Not Pursue** - If you would like to cease communication with your patient
 - Action > Adjust Exam Result > Exam Result Action: Do Not Pursue
 - **Observation:** Patient's previous exam result was set to Observation and a future appointment has not been scheduled. Staff should contact the patient to schedule their upcoming Observation or Recall Ready appointment.
 - From the Action button:
 - **Schedule a Future Appt** - DO NOT USE. Schedule appointment in your PMSW
 - **Set Follow-Up** - Schedule a follow-up to reach out again at a future date
 - **Do Not Pursue** - If you would like to cease communication with your patient
 - Action > Adjust Exam Result > Exam Result Action: Do Not Pursue
 - **Specialist:** Patient's previous exam result was set to Specialist and a future appointment has not been scheduled. Staff should contact the patient to schedule their upcoming appointment.
 - From the Action button:
 - **Schedule a Future Appt** - DO NOT USE. Schedule appointment in your PMSW
 - **Set Follow-Up** - Schedule a follow-up to reach out again at a future date
 - **Do Not Pursue** - If you would like to cease communication with your patient
 - Action > Adjust Exam Result > Exam Result Action: Do Not Pursue

Sign @ Home

A patient has begun/completed selecting treatment, signing the contract, and making the down payment from home.

Determine which steps of the treatment selection process have been completed, contact the patient, and take proper action.

- **Green icon:** indicates this step has been completed
- **Red icon:** indicates this step has NOT been completed
 - **'FD' Financial Documents:** Patient has signed the contract
 - **'DP' Down Payment:** Patient has paid the down payment

Action: Contact your patient, address any incomplete steps, and schedule a start date.

- From the **Action button > Set Appliance Date**

Insurance

This filter contains claims that are ready to be reviewed and submitted. Patients will populate here on their appliance placement date.

- Select **Verify Claim**
- Review 3 highlighted fields:
 - **Procedure Date (box 24):** Confirm that your patient started treatment on this day
 - If the procedure date is no longer accurate, update accordingly, and Click **Save & Verify Later** at the bottom of the claim form
 - **Diag. Pointer (box 29a):** Choose the letter of the corresponding Diagnosis Code from box 34a
 - **Diagnosis Code (box 34a):** Confirm diagnosis code and update if necessary
- Enter your PIN/Password and click **Submit Claim**.

OrthoFi Messages

OrthoFi's primary way of communicating to the practice staff

Review this filter daily and take proper action/respond to each message.

Text Messages

Inbox of all text messages from patients