Pre-OrthoFi Records/Start Patient Appointment Creation

OrthoFi
Starting More Smiles

> • **To expedite the Pre-OrthoFi Records/Start appointment process for patients who received a treatment recommendation and fee quote prior to OrthoFi system implementation.**

1 **Schedule Pre-OrthoFi Records/Start Appointment**

❑ Create New Patient record in OrthoFi
❑ Create Pre-OrthoFi Records/Start Exam record:
  ❑ Set **Exam Type** as NPE
  ❑ Set **Exam Date** as the past exam date when the Doctor recommended treatment for the patient
  ❑ **DO NOT** check the Send Welcome Email box
  ❑ Set the **Start/Records Date** as the future appointment date when the patient will make their Down Payment and sign the contract documents:
    ❑ Select the date from the **Date** field and calendar
  ❑ Select the time of the appointment from the **Time** field:
    ❑ Use the **sliders** to set the hour and minutes
    ❑ Click the **Done** button
❑ Click the **Create Patient** button

Exam (optional)

Doctor	Dr. Richard Smith
Treatment Coordinator	Barb Green
Exam Type	Select...
Exam Date	01/14/2015

🚫 Send Welcome Email

Start / Records Date 05/27/2015   02:35 pm

Choose Time
Time
02:35 pm
Hour
Minute

Now   Done

Cancel   Create Patient

Cancel   Create Patient ▶

2 **Populate Information**

The Populate Info button is only intended for use by the practice staff, it is not for use by the Primary Contact or Patient.

❑ Click the **Populate Info** button from the Patient Record or from Dashboard
❑ Enter all relevant information gathered from the patient's original new patient exam
❑ Click the **Add Insurance** button to enter information for OrthoFi to verify insurance benefits
❑ Click the **Save** button

Patient: Sidney Rogers

Contact:

Payment Plans	Exams	Insurance	Communications

+ New Exam

Exam Date	Exam Type	Location	Treatment Coordinator	Patient Forms (next steps)		Status	
05/29/2015 8:30 AM	Pre-OrthoFi Start / Records	Hometown	Mark Trainer	Populate Info	PC Sidney Rogers F	Tomorrow	Action ▾

Add Insurance

Cancel   Save ▶

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3 **Build Treatment Plan and Pre-Set Payment Slider**

Prior to the Pre-OrthoFi Start/Records Patient appointment you can build the Treatment Plan and set the fee quote to match the earlier presentation of fees.

- ❑ Click the **Action** button and select the **Tx Recommended** option
- ❑ Build the treatment plan in the Treatment Details Build page
- ❑ Click the **Payment Slider** button at the bottom of the Treatment Details Page
- ❑ Set the **Down Payment** and the **Monthly Payment** to match the quoted treatment fee
- ❑ Click the **Print** 🖨 button on the Payment Sider to save the payment amounts
- ❑ Click the **Back Arrow** ◀ button at the bottom of the Printable Page to return to the Payment Slider
- ❑ Click the **Back Arrow** ◀ button on the Payment slider to return to the Treatment Details Build page
- ❑ Click you **practice logo**, or the **Dashboard** link to exit and return to the Dashboard

4 **Conduct Pre-OrthoFi Start/Records Appointment**

- ❑ Present the Payment Slider with the treatment fees
- ❑ Click the **Start Smiling Now** button
- ❑ **Review and initial** the Disclosure document
- ❑ Review the Service Contract:
  - ❑ **Sign and witness** the Service Contract
  - ❑ **Set the estimated appliance placement date**
- ❑ Collect the Down Payment and set the Automated Monthly Payment method

5 **The Financially Responsible Party will Receive an Account Registration Email**

- ~ You will receive an email from OrthoFi on behalf of Dr. _____.
- ~ The email contains a secure link for you to register your account giving you access to view your Service Contract and manage your account online.