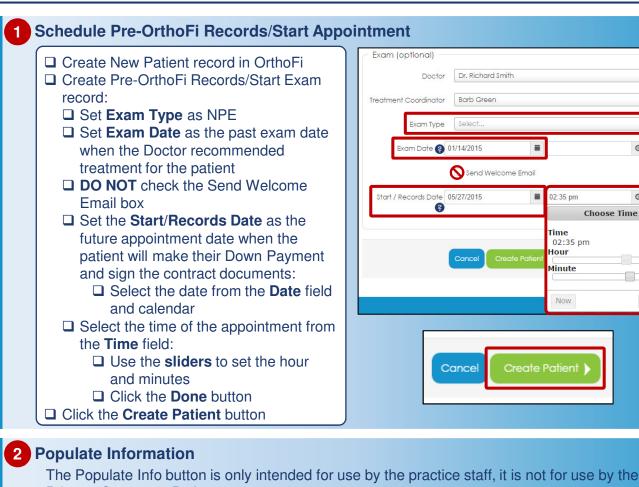
Pre-OrthoFi Records/Start Patient Appointment Creation

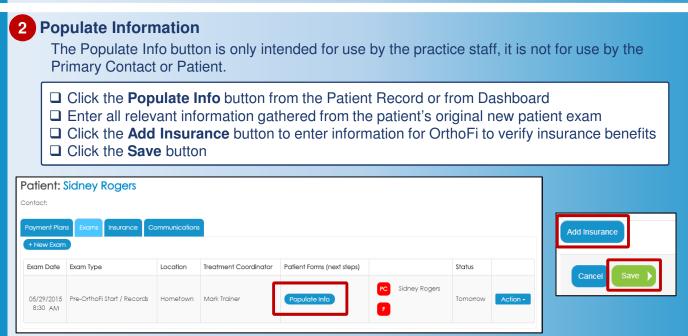


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Done

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





Pre-OrthoFi Records/Start Patient Appointment Creation

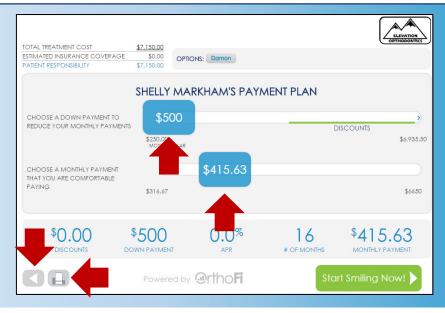


3 Build Treatment Plan and Pre-Set Payment Slider

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 Appointmen	4	Conduct	Pre-OrthoFi	Start/Records	Appointmen
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- ☐ 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.