

Two-Way Text Messaging with Primary Contacts

Once a follow-up campaign is launched, TC's can now text back-and-forth with a patient's primary contact using the auto follow-up phone number registered for each practice location.

Contact: Add Gua

Payment Plans

Patient: Sally Test Tester

Only the Primary Contact with a valid mobile number can receive text messages

To Initiate a Text Conversation:

- Go to the Patient Detail Page and click 'Text Primary Contact'
- You can also initiate texts from the OrthoFi Dashboard by going to the follow-up filter and clicking on the 'Action' button and choosing 'Text Primary Contact'. From the OrthoFi Dashboard:
 - 1. Go to the Follow-Up Filter
 - 2. Click on the 'Action' Button
 - 3. Text Primary Contact

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RT MORE SMILES	Patients Practices	Team Management Insurance Admin In	tegrations	Reports Document Center	Support			
Amazing Ortho - Denv	er 🔽 🗌 Today	Tomorrow Upcoming Needs	s Attention	Follow-Up	@ Home	Insurance	e 🎽 OrthoFi Mess	ages 🙆 📮 Text Messages ⁸
		Pending Management Help						
Follow-Up Date	Last Appt 0	Follow-Up Type	T.C. 0	Patient 0	¢	Age 🍦	Primary Contact	¢ 0
02/23/2021	6/8/2020 10:30 AM	Treatment Recommended/Schedule	D.J.	Cindy May		9	Heidi May	Action -
02/23/2021	6/8/2020 2:30 PM	Observation	D.J.	Rodney Carson				Text Primary Contact
02/23/2021	09/22/2020 3:15 PM	[Auto Follow-Up 6 of 10: Call Reminder] Treatment Recommended/Second Opinion	D.J.	Lizzie Ramos		32	Lizzie Romos	View Communication Schedule a Future Appt.
02/23/2021	11/12/2020 8:30 AM	Treatment Recommended/Schedule	D.J.	Myra West		10	Tiffany West	Manage Follow-Up
02/22/2021	11/12/2020 11:30 AM	Treatment Recommended/Financial	D.J.	Rena Mullins		12	Suzy Mullina	Print Forms
02/22/2021	11/12/2020 1:30 PM	Treatment Recommended/Financial	D.J.	Augusta Lindsey		36	Augusta Lindsey	Adjust Exam Result
02/19/2021	11/11/2020 2:15 PM	Patient Did Not Follow-Up/No Show	D.J.	Polly Salazar		54	Polly Salazar	Decline Tx Do Not Pursue
02/10/2021	11/00/0000 0.00 444					10		Antion

Misc. Charges Insurance Communications

The TC will receive an email notification anytime a patient sends or replies to a text from the practice. To respond, the TC can click on 'Text Primary Contact'.

Hi Audra,
You have received one or more text message(s) from Sam at 1:07 PM on Frida September 10, 2021, in OrthoFi.
PRIMARY CONTACT DETAILS
First Name; Sam
Preferred First Name: Sam
Linked Patients: Sam - Treatment Recommended/Schedule
TEXT PRIMARY CONTACT
VIEW PRIMARY CONTACT
Regards,
Your team at OrthoFi

Text back and forth with the patient using the conversation panel on the screen.

	Appointments to start treatment go quickly, so be sure to book now!
	OrthoFi (Text) - 1:01 PM
	Aug 27
	Questions about treatment or payment options? Reach out to us at (720) 555- 5555, or review here. https://d2rqsxvl6zx82y.cloudfront.net/0331jr0 Appointments to start treatment go quickly, so be sure to book now!
	OrthoFi (Text) - 1:01 PM
	Aug 28
	Just checking in to see if you have any questions from your visit with us at Always Smilling You can review your plan options here, https://dzraswi6zs8zy.cloudfront.net/Smubg5, or reach out to us at (720) 555- 5555. We look forward to starting your smile journey soon!
	OrthoFi (Text) - 1:01 PM
	Sep 10
	Hey Sam, just wanted to follow up to make sure you did not have any questions. Feel free to reach out!
	Sam Spensley • 1:06 PM
Thanks for checking in! Car	n I schedule a follow up appt?
Marsha Mellows + 1:07 PM	
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Text Messaging Inbox

You can view your text messages directly from the OrthoFi Inbox.

To view a text conversation:

- 1. Go to your OrthoFi Dashboard
- 2. Click on the 'Text Messages' filter

Drtho	Fi 📃						Select Lang	uage 🗸	Danielle Smith 👻
ART MORE SM	IILES Pa	atients Pra	ctices Team Managem	nent Insurar	nce Admin Int	egrations Reports Document Center S	upport		
Amazing Ortho	- Denver	Today	Tomorrow	Upcomin	ng 🗌 Needs	Attention 😑 🗹 Follow-Up 🛄 🗌 Start @) Home 🔲 Insurand	->	Text Messages
Date 🔺	Туре 🕴	т.с. 🕴	Patient	Age 🕴	Location 0	Status	Contacts	Reason 🕴	
02/24/2021 08:30 AM	New	D.S.	Toni Jacobs	32	Denver	Complete Forms	PC Toni Jacobs change pc F Toni Jacobs	Exam Result Incomplete	Action -
02/24/2021 09:30 AM	Observatio n	D.S.	Carson, Rodney	11	Denver		PC Denis Becker change pc	Exam Result Incomplete	Action -
02/24/2021 011:00 AM	New	J.W.	Ramos, Lizzie	32	Denver	P M I CS PP 70 pp	PC Denis Becker change pc	Tx Recommended, No Follow-Up	Action -

The Inbox displays all inbound messages for the practice. Practice staff can click on any message to view the full chat thread.

- 1. New Message Patient/Guardian name and message will be bold.
- Mark as Unread After a text message has been opened, click on the bold 'Message' icon to mark the message as 'unread'.
- 3. Treatment Coordinator (TC) shows which TC is tied to the patient/primary contact.
- 4. The inbox will default to displaying messages for the practice location selected, but you may return to the main dashboard to view other locations you have access to.

Sent 9:30 AM	LONE TRE
Sent 9:30 AM	Mark As Unread
Sent 9:30 AM	Mark As Unread
9:30 AM	2 🖻
10:15 AM	Ŕ
11:00 AM	Ŕ
1:30 PM	ê
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