

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.

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

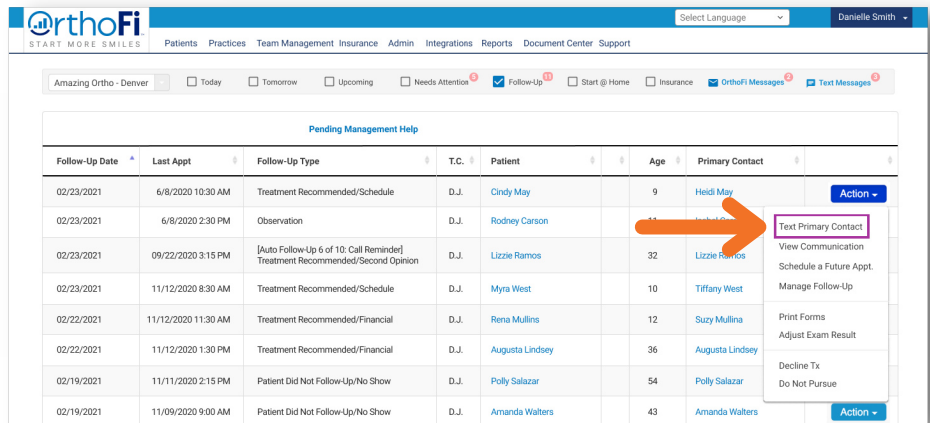
To Initiate a Text Conversation:

- Go to the **Patient Detail Page** and click '**Text Primary Contact**'

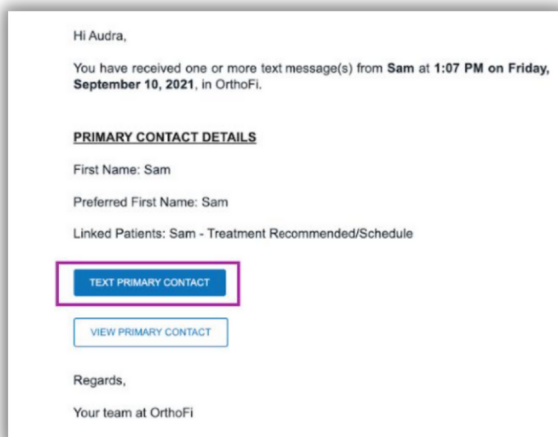


- You can also initiate texts from the **OrthoFi Dashboard** by going to the follow-up filter and clicking on the 'Action' button and choosing 'Text Primary Contact'. From the OrthoFi Dashboard:

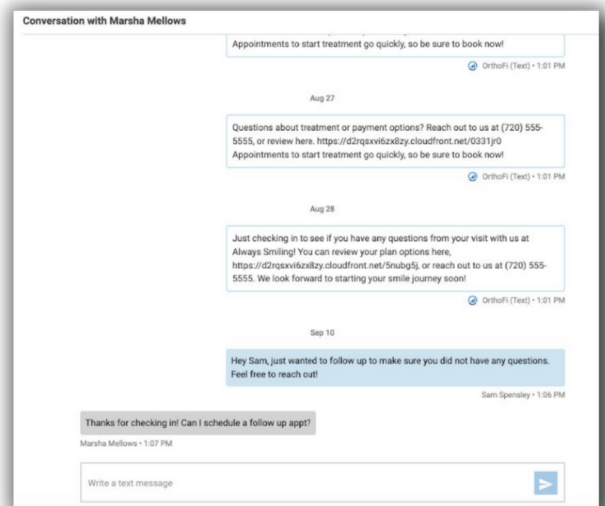
- Go to the **Follow-Up Filter**
- Click on the '**Action**' Button
- Text Primary Contact**



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**'.



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

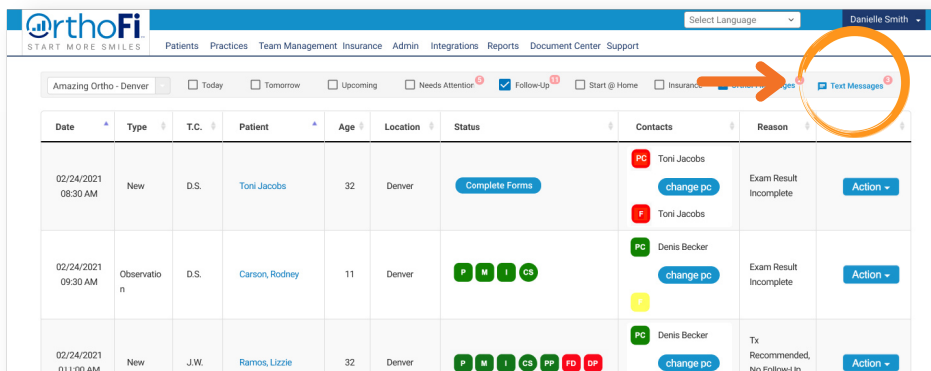


Text Messaging Inbox

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

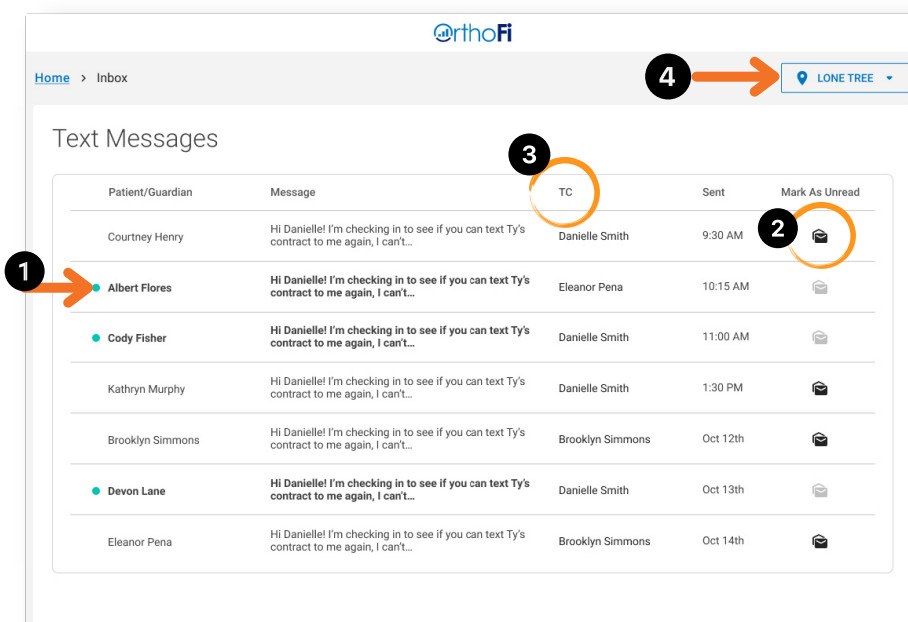
To view a text conversation:

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



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.
2. **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.



CUSTOMER SUPPORT

SUPPORT@ORTHOFI.COM • 877-766-5220 • 8am-8:30pm ET Mon-Thu, 8am-7pm ET Fri