

## Automated Pending Patient Follow-Ups

After treatment is recommended and a slider is emailed home to a patient, an automated pending patient follow-up campaign will begin.

- From the Slider, 'click' the 3-dot button in the upper right-hand corner
- Select **Send to Email** to enter an optional message and send the initial email with the Payment Slider link
- 'Click' **Send & Set Follow Up**

The image shows a screenshot of the OrthoFi interface. The top part displays 'Ellie Jameson's Payment Plan' with two sliders. The first slider is for 'Down Payment' with a value of '\$2,850.00'. It has a green bar for 'MOST POPULAR' (ranging from \$1,250.00 to \$6,200.00) and a blue bar for 'DISCOUNT'. The second slider is for 'Monthly Payment' with a value of '\$304.55'. It has a green bar for 'INTEREST' (ranging from \$158.18 to \$3,350.00). A three-dot menu in the top right corner is highlighted with a yellow box, and a yellow arrow points from it to a dropdown menu. The dropdown menu contains the following options: 'Cheat Sheet', 'Customize Slider', 'Print', 'Send to Email' (highlighted with a yellow box), 'Set Follow-Up', and 'Set Start Date'. Below the sliders is a 'Send to Email' modal form. The form has the following fields: 'From: support@orthofi.com', 'Subject: Review Your Payment Options', 'To: Katie Jameson motherofelliejameson@Orthofi.com', 'Add Email' button, 'Message: Hi Katie, It was great meeting you and Ellie today...', 'Email Settings' section with 'Language: English', and 'SEND & SET FOLLOW-UP' button (highlighted with a yellow box) and 'CANCEL' button.

## Set Follow-Up Schedule

After clicking **Send & Set Follow Up** via the Slider, confirm the schedule and Primary Contact who will receive the automated messages.

- The 11-week schedule includes a mix of personalized email, text messages, and scheduled call reminders
- The **Follow-Up Schedule Start Date** is automatically set for the day after the exam with the first text message sent 24 hours later:
  - You may change the date to delay the start of the Follow-Up Schedule
- Scroll down to the **Follow-Up Details** section
- Use dropdown to enter **Follow-Up Reason**
- Enter your **Follow-Up notes**
  - Notes are **not** visible to the Primary Contact
- Confirm Primary Contact Name
- Confirm Primary Contact Mobile number:
  - Can only be set for a Primary Contact
  - Changes update the Primary Contact's account
- 'Click' **SAVE**

### Follow-Up Details

Follow-Up Reason \*  
Financial

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Follow-Up Note  
The guardian would like to discuss with her partner before committing to a contract

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Follow-up texts and emails will be sent to the Primary Contact, please ensure their contact details are correct:

First Name \* Preferred Name  
Katie Jameson

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Email  
motherofellie123@orthofi.com

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Mobile \*  
(555) 555-5555

SAVE
CANCEL

### Set Follow-Up Type

Automated Follow Up New Follow Up Reminder

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#### Pending Patient Follow-Up Schedule

The schedule is a mix of automatic text and email messages sent to pending patients/guardians on your behalf, and also, call reminders for a personalized touch. It will stop when either the recipient takes an action or you turn it off.

Follow-Up Start Date \*  
5/13/2021

Schedule Duration: 11 Weeks

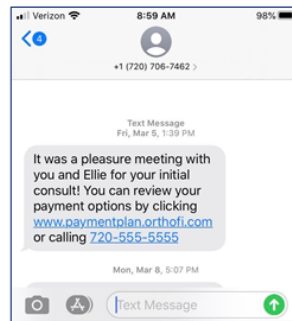
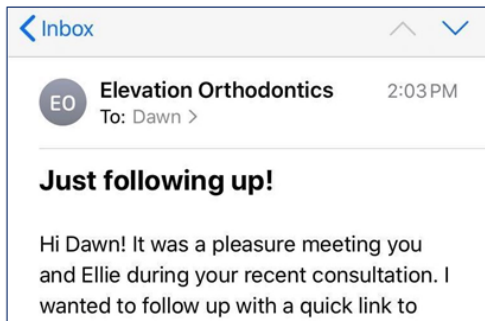
Week 1	<span style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px;">TEXT</span> <b>Review Your Payment Plan</b>	Friday, May 14
	<span style="background-color: #6c757d; color: white; padding: 2px 5px; border-radius: 3px;">CALL REMINDER</span> <b>Follow-Up Call 1</b>	Sunday, May 16
	<span style="background-color: #6c757d; color: white; padding: 2px 5px; border-radius: 3px;">EMAIL</span> <b>Just Checking In...</b>	Wednesday, May 19
Week 2	<span style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px;">TEXT</span> <b>Customize For Your Budget</b>	Thursday, May 27
Week 3	<span style="background-color: #6c757d; color: white; padding: 2px 5px; border-radius: 3px;">EMAIL</span> <b>First Impressions Are Everything</b>	Thursday, June 3
Week 5	<span style="background-color: #6c757d; color: white; padding: 2px 5px; border-radius: 3px;">CALL REMINDER</span> <b>Follow-Up Call 2</b>	Sunday, June 13
Week 6	<span style="background-color: #6c757d; color: white; padding: 2px 5px; border-radius: 3px;">EMAIL</span> <b>Benefits Of A New Smile</b>	Friday, June 18
Week 8	<span style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px;">TEXT</span> <b>Last Text Attempt</b>	Friday, July 2
	<span style="background-color: #6c757d; color: white; padding: 2px 5px; border-radius: 3px;">EMAIL</span> <b>Preventative Care</b>	Thursday, July 8
Week 11	<span style="background-color: #6c757d; color: white; padding: 2px 5px; border-radius: 3px;">EMAIL</span> <b>Last Email Attempt</b>	Wednesday, July 28

# Automated Follow-Up Schedule Details

## Message Schedule

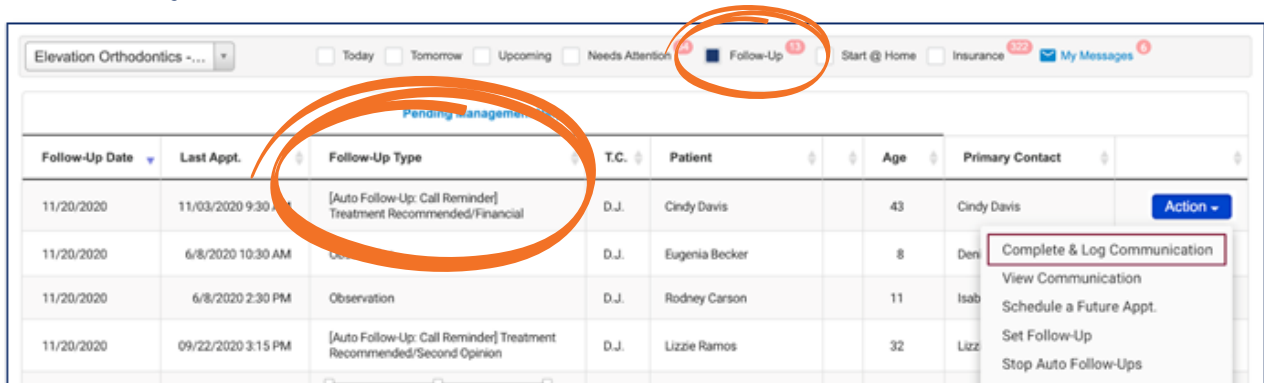
- Message Schedules can **not** be customized
- Primary Contact receives **3 text messages** and **5 emails**
- TC receives 2 call reminders that will populate in the 'Follow-Up' filter on your dashboard
- **Follow-Up Reason** and **Follow-Up Notes** are logged on the call prompts
- When a schedule is started for a patient, the activity is logged in the **Communications** tab
- Emails will come from **noreply@orthofi.com** and will display your Practice Name as the sender
- Each practice location has their own phone number from which texts are sent

Type	Days
Text	1
Call Reminder	3
Email	6
Text	14
Email	21
Call Reminder	31
Email	36
Text	50
Email	56
Email	76



## Treatment Coordinator Call Reminders

- TC receives 2 Follow-Up call reminders: Day 3 & 31
- Follow-Up Call reminders are automatically scheduled and display in the **Follow-Up Filter** on your dashboard
- You can set additional Follow-Up call reminders as needed
- The **Follow-Up Type** column indicates call reminders that are part of an Automated campaign
- Click **Action** and select **Complete & Log Communications** as you call to follow up with the Primary Contact



# Automated Follow-Up Communications

All Follow-Up Schedule actions/activities are recorded in the **Patient Detail Page's Communications Tab**

## Notes are automatically logged for:

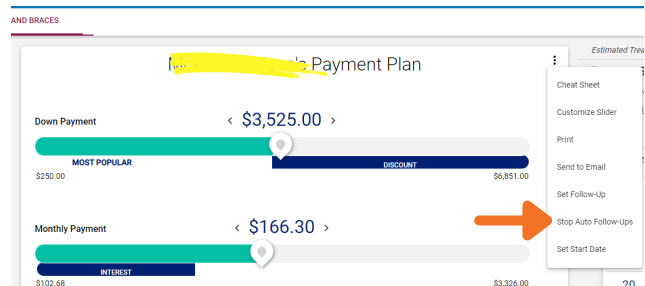
- Follow-Up Campaign Start
- Sent Email Messages
- Sent Text Messages
- Completed Follow-up Call Reminders
- Manual campaign Stop
- Financial Responsible Party Signed a Contract
- Exam Result Changed
- Guardian Opted-Out

Date & Time	Type	Logged By	Notes	Category
3/25/2021 3:30 PM	Call		Called and left voicemail, no answer. Going to keep patient in follow-up schedule.	Follow-Up
3/25/2021 08:00 AM	Auto Follow-Up 2 of 7: Call Reminder		Call patient at 3343004624, <a href="#">view cheat sheet</a> to reference patient details.	Misc
3/23/2021 08:00 AM	Auto Follow-Up 1 of 7: Text		Text sent to 3343004624. Text Message: "Hello, this is Danielle at Elevation Ortho! It was a pleasure meeting with you and his for your initial consult! You can review your payment plan options in your OrthoFi patient portal, <a href="http://patient.orthofi.com/treatmentpaymentplan">http://patient.orthofi.com/treatmentpaymentplan</a> and reach out with questions by calling 803-345-6890. You can reply 'STOP' at any time to end these texts."	Misc
3/22/2021 12:18 PM	Auto Follow-Up Set		Note: Patient said they would like more time to think over financing, maybe put reason	Misc

## End Scheduled Messages Early

Manually stop a campaign at any time:

- Payment Slider
  - 3-dot button
  - Stop Auto Follow-Ups



- Patient Detail Page
  - Exams Tab
  - Action > Stop Auto Follow-Ups

The top screenshot shows the 'Exams Tab' with a table of exam results. The bottom screenshot shows the 'Action' menu for an exam, with an arrow pointing to the 'Stop Auto Follow-Ups' option.

- Follow-Up Filter
  - Action > Stop Auto Follow-Ups

# Automated Follow-Up Communications

All Follow-Up Schedule actions/activities are recorded in the  
**Patient Detail Page's Communications Tab**

## Completion of Message Schedule

Automatically stops a Follow-Up Schedule as the result of one of four events:

- Exam Result = Do Not Pursue / Declined Tx
- Contract Signed
- Start/Records Date Set
  - Payment Slider
  - Exam Result
- Guardian Opts-Out
  - Reply "stop" in text messages
  - Click "unsubscribe" in emails
  - Guardian will be placed on Needs Attention Filter