

## Claims Communication Process

*This document outlines where communication from OrthoFi's Claims team can be found and how to properly respond to these messages.*

### Overview:

- Messages from OrthoFi's Claims team will populate in the **OrthoFi Messages** filter on the Dashboard. Certain "Claims" category messages will direct practice users to submit and upload information via the Message Center.
- The **Resolve** button directs the user to the Insurance Summary Page (ISP) where the requested information can be provided.
- Potential "Claims" category requests in the Message Center include **Info Requested From Practice, Payment Upload Requested from Practice, and Payment Upload Error Re-Upload Requested.**
- Tasks appear in different colors on the ISP depending on who is assigned to them. The task is colored red when assigned to the practice, and the task is colored blue when assigned to OrthoFi.

### ★ Info Requested from Practice:

#### Message example:

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Dashboard > OrthoFi Message Center

📍 DENVER

### OrthoFi Message Center

PRIORITY

CATEGORY

CLEAR FILTERS

Due Date ↓	Location	Category	Patient	Carrier	Message	Sent By	Related Link	Action
<span style="color: #dc3545;">▲</span> PAST DUE 10/22/22	Denver	CLAIMS	Kathryn Murphy	Delta Dental of Indiana	The plan for this patient is requesting additional information to process the claim on file for your patient's treatment. Please provide X-Rays and a Clinical Narrative to submit to the carrier.	Itsamee Mahreech 10/20/2022	<a href="#">VIEW POLICY</a> <span style="font-size: 0.8em;">🔗</span>	RESOLVE
<span style="color: #ffc107;">⌚</span> DUE TODAY 10/23/22	Denver	UNDERPAY	Kathryn Murphy	Blue Cross Blue Shield of Oklahoma	We have determined an insurance payment was issued to your practice location. MetLife issued payment for \$1,000.00 via check and \$1,000.00 by your practice on 10/1/22. Please upload the EOB to balance the account.	Itsamee Mahreech 10/20/2022	<a href="#">VIEW POLICY</a> <span style="font-size: 0.8em;">🔗</span>	RESOLVE

### Practice steps:

1. Select the **Resolve** button.
2. Complete the information in the slideout on the right side of the ISP by:
  - a. Selecting a “Diagnosis”
  - b. Providing the requested information in the text box
  - c. Uploading a file (if applicable)

OrthoFi

DOB: [REDACTED]

Kathryn Murphy > Insurance > Delta Dental of Indiana

INSURANCE POLICY | POLICY TIMELINE

Delta Dental of Indiana [✕](#)  
SECONDARY POLICY [✎](#)

**Practice Task: Info Requested from Practice** [RESOLVE](#)

The plan for this patient is requesting additional information to process the claim on file for your patient's treatment. Please provide X-Rays and a Clinical Narrative to submit to the carrier. [VIEW MORE](#)

**Claim Verified**

Appliance Placement Date and claim form have been verified.

POLICY IN CLAIMS

BENEFIT PAYMENTS

Current Estimate	\$	2,000.00
Received	\$	1,293.36
Remaining	\$	706.64

Policy on track.

Exam: Exam Date 9/14/2022

Eligibility: Network Participation In Network, Policy Network Type PPO

Treatment: Total Months in Treatment 6 - 12 months

**Practice Task: Info Requested from Practice** ✕

Complete the following information to resolve this task and remove it from this policy.

Diagnosis

Note

UPLOAD FILE

SUBMIT

CANCEL

3. Select the **Submit** button. This will resolve the message from the Message Center.

*Note: The ISP Policy Timeline will have a record of the message from OrthoFi and the response submitted by the practice via the slideout.*

★ **Payment Upload Requested from Practice**

**Message example:**



Dashboard > OrthoFi Message Center

DENVER

OrthoFi Message Center

PRIORITY CATEGORY CLEAR FILTERS

Due Date	Location	Category	Patient	Carrier	Message	Sent By	Related Link	Action
<b>PAST DUE</b> 10/22/22	Denver	CLAIMS	Kathryn Murphy	Delta Dental of Indiana	Hello. I am reaching out to you today in regards to a missing Kathryn Murphy, Delta Dental of Indiana's policy. We confirm/ed the following payment #123456789, for DOS 10/2021 was issued on 10/21/2021 for \$100.00. Please confirm if this payment was processed by your office by uploading the EOB. Please reach out if you have any questions. Thank you!	Itsamee Mahreech 10/20/2022	<a href="#">VIEW POLICY</a>	RESOLVE
<b>DUE TODAY</b> 10/23/22	Denver	UNDERPAY	Kathryn Murphy	Blue Cross Blue Shield of Oklahoma	We have determined an insurance payment was issued to your practice location: MetLife issued payment for \$1,000.00 via check and \$1,000.00 by your practice on 10/1/22. Please upload the EOB to balance the account.	Itsamee Mahreech 10/20/2022	<a href="#">VIEW POLICY</a>	RESOLVE

**Practice steps:**

1. Select the **Resolve** button.
2. Select **Upload Payment**.



DOB:

Ledger

**Insurance**

Exam Date 9/14/2022

Cigna Dental PRIMARY

**Delta Dental of Indiana** SECONDARY

Kathryn Murphy > Insurance > Delta Dental of Indiana

INSURANCE POLICY POLICY TIMELINE

**Delta Dental of Indiana** SECONDARY POLICY

**Practice Task: Payment Upload Requested from Practice** [RESOLVE]

Hello. I am reaching out to you today in regards to a missing Kathryn Murphy, Delta Dental of Indiana's policy. We confirm/ed the following payment #123456789, for DOS 10/2021 was issued on 10/21/2021 for \$100.00. Please confirm if this payment was processed by your office by uploading the EOB. Please reach out if you have any questions. Thank you!

[VIEW MORE](#)

**Claim Verified**

Appliance Placement Date and claim form have been verified.

Policy on track.

**BENEFIT PAYMENTS**

Current Estimate	\$ 2,000.00
Received	\$ 1,293.36
<b>Remaining</b>	<b>\$ 706.64</b>

**Practice Task: Payment Upload Requested from Practice**

Complete the following information to resolve this task and remove it from this policy.

**UPLOAD PAYMENT**

Diagnosis

Note

**SUBMIT**

CANCEL

**Exam**

Exam Date  
9/14/2022

**Eligibility**

Network Participation  
In Network

Policy Network Type  
PPO

**Treatment**

Total Months in Treatment  
6 - 12 months

- On the **New Insurance Payment / EOB Upload** page, upload the requested information.

New Insurance Payment / EOB Upload

1. Scan all pages of a single envelope where the insurance payment / EOB includes an OrthoFi Patient

2. Drag and drop the resulting file(s) containing all of the envelope contents inside this box

OR

[Click to select multiple files](#)

Back to List
Save Changes ▶

- Return to the ISP page to complete the remaining fields on the slideout, including selecting a “Diagnosis” and adding a note.

The screenshot shows the OrthoFi interface for a patient named Kathryn Murphy. The main content area displays the 'Delta Dental of Indiana' secondary policy. A 'Practice Task: Payment Upload Requested from Practice' is highlighted with a red border, containing a message about a missing EOB and a 'RESOLVE' button. Below this, a 'Claim Verified' section shows 'Appliance Placement Date and claim form have been verified.' and 'Policy on track.' A 'BENEFIT PAYMENTS' table is also visible.

BENEFIT PAYMENTS	
Current Estimate	\$ 2,000.00
Received	\$ 1,293.36
Remaining	\$ 706.64

On the right, a 'Practice Task' slideout is open, showing a form with a 'Diagnosis' dropdown menu and a 'Note' text area, both highlighted with a green border. The slideout also includes 'SUBMIT' and 'CANCEL' buttons.

The bottom of the screen shows a summary table with the following data:

Exam	Eligibility	Treatment
Exam Date: 9/14/2022 11:10 AM (MDT)	Network Participation: In Network	Total Months in Treatment: 6 - 12 months
Exam Type: New	Policy Effective Date: 9/1/2019	
Exam Result: Treatment Recommended	Benefit Remaining: \$2,000.00	
	Verification Status: Complete 1/5/2023	
	Policy Network Type: PPO	
	Benefit Max: \$2,000.00 Lifetime	
	Coinsurance Percentage: 50%	
	Pre-Auth & Pre-D: none	

5. Select the **Submit** button. This will resolve the message from the Message Center.

*Note: The ISP Policy Timeline will have a record of the message from OrthoFi and the response submitted by the practice via the slideout.*

★ **Practice Upload Error Re-Upload Requested**

**Message example:**

The screenshot shows the OrthoFi Message Center interface. At the top, there are tabs for 'MESSAGE CENTER' and 'MESSAGE ARCHIVE'. Below the tabs is the title 'OrthoFi Message Center'. There are filter options for 'PRIORITY' and 'CATEGORY', along with a 'CLEAR FILTERS' button. A table lists messages with columns: Due Date, Location, Category, Patient, Carrier, Message, Sent By, Related Link, and Action. One message is highlighted with a yellow background in the 'Category' column, labeled 'CLAIMS'. The message text states: 'The document uploaded was not the full bulk EOB. We are unable to allocate this payment due to missing pages. Please reupload with the full bulk EOB uploaded all into one upload.' The 'Sent By' field shows 'Megan Jacobson' and the date '8/1/24 3:08 PM'. The 'Action' column contains a blue 'RESOLVE' button.

**Practice steps:**

1. Select the **Resolve** button.
2. Select **Upload Payment**.

The screenshot shows a patient's insurance policy page. On the left, there is a sidebar with patient information: 'DOB: 5/1/2007 (Age 17)', 'Ledger', 'Insurance', and 'Exam Date 9/27/2022'. The main content area is titled 'Delta Health Systems c/o Premier Access Dental' and 'PRIMARY POLICY'. There are three tabs: 'INSURANCE POLICY', 'POLICY TIMELINE', and 'PAYMENT HISTORY'. A red alert box is visible, titled 'Practice Task: Practice Upload Error Re-Upload Requested', with a 'RESOLVE' button. Below the alert, there is a task: 'OrthoFi Task: Confirm Practice Provided Information'. A 'Payment Received' section shows 'Pending Next Payment' and 'Policy on track.' On the right, there is a 'Practice Task: Practice Upload Error Re-Upload Requested' slideout. It contains a form with a 'Diagnosis' dropdown, a 'Note' text area, and buttons for 'UPLOAD PAYMENT', 'SUBMIT', and 'CANCEL'.

3. On the **New Insurance Payment / EOB Upload** page, upload the requested information.

#### New Insurance Payment / EOB Upload

1. Scan all pages of a single envelope where the insurance payment / EOB includes an OrthoFi Patient

2. Drag and drop the resulting file(s) containing all of the envelope contents inside this box

OR

[Click to select multiple files](#)

[Back to List](#) [Save Changes ▶](#)

4. Return to the ISP page to complete the remaining fields on the slideout, including selecting a “Diagnosis” and if you were able to re-upload the payment..

The screenshot shows the OrthoFi interface for a policy titled "Delta Health Systems c/o Premier Access Dental". The "PRACTICE TASK" section is highlighted with a red border, containing the message: "Practice Task: Practice Upload Error Re-Upload Requested. The document uploaded was not the full bulk EOB. We are unable to allocate this payment due to missing pages. Please reupload with the full bulk EOB uploaded all into one upload." A "RESOLVE" button is next to the message. Below this is an "OrthoFi Task: Confirm Practice Provided Information" section with a "PAYMENT RECEIVED" status and a "Payment Received" icon. To the right, a slideout titled "Practice Task: Practice Upload Error Re-Upload Requested" is open, showing a "Diagnosis" dropdown menu with "I cannot re-upload the payment" and "I re-uploaded the payment" as options. The slideout also has an "UPLOAD PAYMENT" button, a "SUBMIT" button, and a "CANCEL" button.

5. Select the **Submit** button. This will resolve the message from the Message Center.

*Note: The ISP Policy Timeline will have a record of the message from OrthoFi and the response submitted by the practice via the slideout.*