



TREATMENT COORDINATOR
Do I need to build a slider for this patient?

EXAM RESULT = TX RECOMMENDED
Build Treatment Details - and -
Present the Slider

IF PATIENT IS READY TO SCHEDULE NEXT OBS EXAM
Do not add exam result in OrthoFi
Schedule next Observation exam in Ortho2 Edge

Does the patient want to sign & pay the contract today?

PRESS START SMILING NOW BUTTON ON SLIDER

Do they want to schedule their start date?

Sign Contract & Process Payment

IF THE EXAM RESULT IS

- **OBSERVATION**
 - Only if the patient is not scheduling their next visit
- **SPECIALIST**
- **NO TREATMENT**
- **DO NOT PURSUE**

Enter Exam Result in OrthoFi
-and-
Set a Follow-Up date in OrthoFi

PRESS 3-DOT BUTTON ON SLIDER
Send to Email - and -
Set a Follow-Up Date

PRESS 3-DOT BUTTON ON THE SLIDER
Set Start/Records Date in OrthoFi - and -
Schedule Clinical Appt. in Ortho2 Edge

SCHEDULING

- **Enter Patient in Ortho2 Edge**
 - Import might take 5 min
- **Enter Exam in Ortho2 Edge**
 - Do not enter patients or exams directly into OrthoFi
- **Add Insurance into OrthoFi**
 - Insurance does not import from Edge

Ortho2 Edge updates take up to 5 min to reflect in OrthoFi

Visit the Integration Help Center if a patient or exam hasn't been imported by OrthoFi