Cloud 9 Software

Cloud 9 Patient Import - Troubleshooting Guide

Cloud 9 Connect will not allow you to import the patient unless all of the fields pictured below are completed in Cloud 9. This guide will help you troubleshoot why you're not able to locate or import a patient when clicking **+ Add Cloud9 Patient**

No Search Results

We recommend searching with <u>Patient ID</u> for the fastest and most accurate results. The search feature uses Cloud 9 to search for the patient, so Patient ID will give you the quickest response since it's an unique identifier for the patient.

If there are no search results using <u>Patient ID</u>, please proceed to the next page.

No suggested matches.

Please use the search area above to find patients.
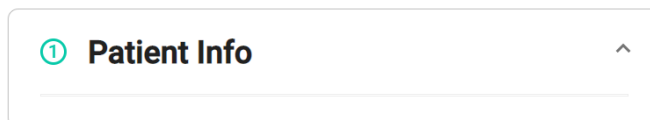

If you locate the patient, but nothing populates under the <u>Patient Info</u> tab, please proceed to the next page.

Review & Confirm Info:

Please review and confirm if the insurance and information provided is still correct. If anything has changed or is missing, please update.

① **Patient Info**   ∧

Step 1: Check the Responsible Party's account in Cloud 9

- <u>Children</u> - Make sure Responsible Party has all highlighted fields completed
- <u>Siblings</u> - Link them to the same Responsible Party record as their siblings
- <u>Adults</u> - Mark them as <u>Relationship Type = Self</u> in Cloud 9

Financially Responsible

Relationship Type	Mother	<--- *Change to "Self" for adult patients*
Title		<--- *Click here to link families*
First Name	Samantha	
Middle Name		
Last Name	Johnson	
Gender ---> **Gender**	Female	**Suffix**
Greeting		
Birthdate --> **Birthdate**	07/04/1985	**Age** 36 years, 5 months
Social		

Correspondence ☐ Phone ☐ Email ☐ Text

Addresses

Street	City	State	Postal Code	Rank
123 Fake Street	Denver	CO	80209	1

Showing 1 to 1 of 1 rows

Make sure the email/phone are in this box, not "Description"

Contact Info

Type	Description	Contact Info	SMS Carrier	Rank
E-Mail	Mom's Email	suziesmom123@email.com		1
Cell	Mom's Cell	(555) 555-5555		2

Showing 1 to 2 of 2 rows

Referrals & Professionals

Referring Party	P/C	Profession	Relationship Type	Referred In/Out	Is Professional
			No matching records found		

The Responsible Party's email and phone number are both required to import the patient from Cloud 9.

A common issue Cloud 9 users run into is putting email and/or phone number in the "Description" box instead of the "Contact Info" box, as highlighted above.

Step 2: Check the Patient account in Cloud 9

- Make sure all highlighted fields are completed

Now that you've confirmed all information has been added into Cloud 9, save your work and go back to OrthoFi and search using the Patient ID. If you're still not able to import the patient, please contact Integrations@OrthoFi.com for further support.