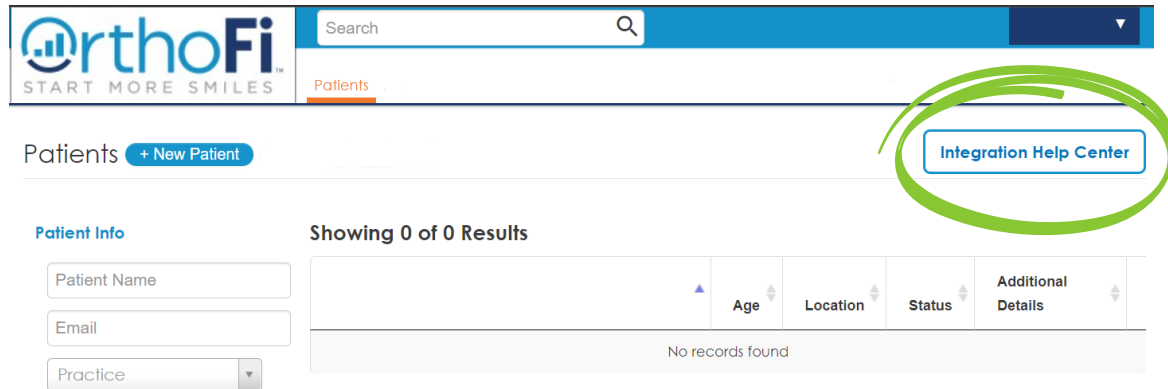


## Integrations Help Center

Learn how to check your connection, import patients, and more from [Dolphin](#) or [Ortho2Edge](#).



### Access the Help Center

Look for the Help Center button on the upper right side of the Patient Detail Page and the Patient Search Page in OrthoFi

### Check Your Connection Status

Select the practice and location -> press the [Get Integration Status](#) button

#### Connection to Practice Management Software

Select Integration  
Matt's Practice

Select Location  
Smith Jones Orthodontics - Drs. Smith anc


GET INTEGRATION STATUS



The OrthoFi - Ortho2Edge connection is working as expected.

### Reconnect to OrthoFi

If your connection is down, please follow the instructions on the screen to restart your connection. The instructions will vary based on the Practice Management Software your practice is using.

 The Dolphin Ocean Server is down, which means we are unable to pull patient or exam data into OrthoFi. You or your IT lead will need to take the following steps to restart the server, or reach out to Dolphin support if you're still having trouble.

1. Log into the Windows Machine used to host Dolphin for your practice
2. Click the Windows button and search for "Services"
3. Open "Services" and find the "Dolphin Ocean Service"
4. Right click on "Dolphin Ocean Service" and click "Restart"

## Patient Record Search & Import

Enter a patient's full name with no additional spaces and press the search button.

### Search for Patients & Exams in Practice Management Software

Patient Name

Happy Patient

SEARCH

	First Name	Last Name	Patient Status	Location	DOB	Created On	Created By	Patient ID
Dolphin	Happy	Patent	set	Denver	04/01/10	4/28/21	N/A	bc2b441c-d2e2-48e2-b326-23...
OrthoFi	Happy	Patient	N/A	Denver	04/01/10	4/28/21	Integration	123456

If a patient makes changes to any information while completing forms, it will display in red. This could be a name misspelling or incorrect date of birth. This does not automatically update back to your Practice Management Software.

## Review Appointment History

The area under Associated Exams shows you the appointment history that Dolphin or Ortho2Edge is communicating to OrthoFi. You can see when the record was created and who created it. It also provides ID numbers for Support.

An exam that is linked between your Practice Management Software and OrthoFi will have matching lines, representing both softwares. If there is no linked exam, that means the appointment code is Excluded from the OrthoFi connection.

### Associated Exams

Filter Exams

Displaying 8 of 8 exam(s)

	Date	Type	TC	Doctor	Location	Status	Created On	Created By	Appointment ID
Dolphin	5/10/21, 8:00 A...	New Patient Exa...		Smith	Denver	Checked Out	4/28/21	N/A	8df038be-75fe-4...
OrthoFi	5/10/21, 8:00 A...	New	Kim	Smith	Denver	Treatment Reco...	4/28/21	Integration	1786101
	Date	Type	TC	Doctor	Location	Status	Created On	Created By	Appointment ID
Dolphin	6/22/21, 8:00 A...	Invisalign 4 unit ...		Smith	Denver	Checked Out	6/14/21	N/A	b0943b35-0a96-...
OrthoFi	No Linked Exam								

If a required field such as TC, Doctor, or Location is missing in your Practice Management Software, it will display in Red. The exam will import using your system Defaults which are established during the initial connection setup.

## How to Manually Import Patients & Exams

If a patient or exam wasn't automatically imported by OrthoFi, you have the ability to import it manually. Click the blue Import Exam button.

A confirmation message will appear at the bottom of your screen - please allow 1-2 minutes for the patient or exam to import.

	First Name	Last Name	Patient Status	Location	DOB	Created On	Created By	Patient ID
Ortho2	Happy	Patient		Drs. Smith and Jones (South ...	6/1/00		N/A	236DDF67-85DF-47EC-9EA7-5E21D90CFE56
OrthoFi	Happy	Patient	N/A	Drs. Smith and Jones (Pawn...	6/1/00	9/15/21	Integration	886098

Associated Exams		Filter Exams						
Date	Type	TC	Doctor	Location	Status	Created On	Created By	Appointment ID
7/12/21, 8:20 AM -06:00	Booked		Carl Jones	Drs. Smith and Jones (South ...	booked		N/A	CA545369-707F-4D28-82AD-...
No Linked Exams		<b>IMPORT EXAM</b>						

**HIDE EXAMS** ^

Import event triggered successfully. Please wait 1-2 minutes before searching the patient name again.

Dismiss

## Remove Patient / Edit Appointment History

OrthoFi will match your Practice Management Software as a historical record. OrthoFi Support is unable to remove patients or exams that were imported from your Practice Management Software.

## Request Changes to Practice Default Settings

Please visit the website below to easily request changes to your practice's default settings. You can also email us at [Integrations@OrthoFi.com](mailto:Integrations@OrthoFi.com)

[Implement.OrthoFi.com/Integration-Updates](https://Implement.OrthoFi.com/Integration-Updates)