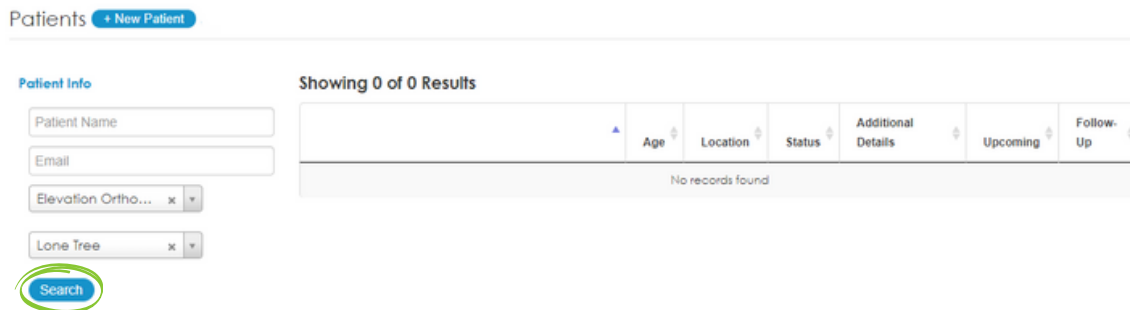


PATIENT DETAIL PAGE

Every patient entered in OrthoFi will have a Patient Detail Page. Access this page by clicking 'Patients' at the top of your homepage and use the search bar to locate the patient.



The screenshot shows the 'Patients' page with a '+ New Patient' button. On the left, under 'Patient Info', there are input fields for 'Patient Name', 'Email', and two dropdown menus for 'Elevation Ortho...' and 'Lone Tree'. A 'Search' button is circled in green. On the right, a table header is visible with columns: 'Age', 'Location', 'Status', 'Additional Details', 'Upcoming', and 'Follow-Up'. The table content shows 'Showing 0 of 0 Results' and 'No records found'.

WHAT DOES THIS PAGE DO?

- Log a New Communication [New Communication](#)
- Create a New Misc Charge [New Misc Charge](#)
- Edit Patient Info - click on name in blue - [Sherri Spaghetti](#)
- Edit Contact Info - click on name in blue - [Samantha Spaghetti\(PC, FRP\)](#)
- Add a Guardian [Add Guardian](#)

PATIENT DETAIL PAGE TABS

Payment Plans Exams Misc. Charges Insurance Communications Ledger								
Start Date	Location	Treatment/Charge	Pay Off Amount	Date of Last Payment	Account Status	Contract FRP	Contract ID	
5/18/2021	Elevation Orthodontics - Lone Tree	• Toothpaste	\$0.00	5/18/2021	Up to Date	Samantha Spaghetfi(samantha.spaghetfi1234567@orthofi.com)	48450	Action -
4/8/2021	Elevation Orthodontics - Lone Tree	Insignia	\$875.00	4/8/2021	Up to Date	Samantha Spaghetfi(samantha.spaghetfi1234567@orthofi.com)	48285	Action -

PAYMENT PLANS

- View Payment Plan
 - View Invoices
 - Auto-pay
- Contract Changes/Refunds
- View/Print Documents

Payment Plans Exams Misc. Charges Insurance Communications Ledger							
Exam Date	Exam Type	Location	Treatment Coordinator	Patient Forms (next steps)		Status	
04/08/2021 12:00 AM	Start / Records	Elevation Orthodontics - Lone Tree	Helen Jensen	P M I CS PP FD DP	PC Samantha Spaghetfi F Samantha Spaghetfi	Patient Started	Action -

EXAMS

- Previous/Upcoming exams
- Schedule New
- Edit Exam Results
- Modify Schedule

Payment Plans Exams Misc. Charges Insurance Communications Ledger						
Charge Date	Location	Item(s)	Practice Staff User	FRP	Claim Info	
5/18/2021	Elevation Orthodontics - Lone Tree	• Toothpaste	Justin Blau	Spaghetfi, Samantha		Add New Insurance

MISC CHARGES

- Existing misc charges
- Option to add insurance policy

Payment Plans Exams Misc. Charges Insurance Communications Ledger					
Exam Date	Carrier	Subscriber	Status	Plan Priority	Action
04/13/2023	Della Dental of CA (Cerritos, CA)	Elvis Presley	Unverified	Primary	View Policy

INSURANCE

- Add new policies
- View Policy - Insurance Summary page for details on eligibility and claims

- Send Email Reminders - Elevation Orthodontics
- Do Not Contact re: Collections - Elevation Orthodontics
- Send Text Message Reminders - Elevation Orthodontics

Date Range: to
 Type: Please Select
 Logged By: Please Select
 Category: Please Select

COMMUNICATIONS

- Not visible by patient
- List of communications with patient
- Opt Patient Out of:
 - Emails
 - Texts
 - Collections communication
- Filters available for easier searching

Ledger

Contract (1) Twin Brackets 07/01/2015

[VIEW CONTRACT](#)

\$5,000.00
Total Treatment

Payments Complete
Next Payment

\$0.00
Past Due Amount

PATIENT RESPONSIBILITY

Treatment Cost	\$ 5,000.00
Adjustments, Late Fees & Accrued Interest	\$ 0.00
Expected	\$ 5,000.00
Received	\$ 5,000.00
Remaining	\$ 0.00

INSURANCE BENEFITS

Original Estimate	\$ 0.00
Insurance Adjustments	\$ 0.00
Expected	\$ 0.00
Received	\$ 0.00
Remaining	\$ 0.00

PATIENT RESPONSIBILITY **INSURANCE**

Patient Responsibility

[EXPORT](#)

[MAKE A PAYMENT](#)

Hide Failed Transactions

Date	Description	Amount	Balance	Status	Payment Method	Return Reason
> 07/01/2015	Contract Start	\$5,000.00	\$5,000.00			
07/01/2015	Estimated Benefit	\$0.00	\$5,000.00			

LEDGER

- All charges and payments
- Summary and detail views
- Patient and insurance balances
- Make a payment
- Export to Superbill