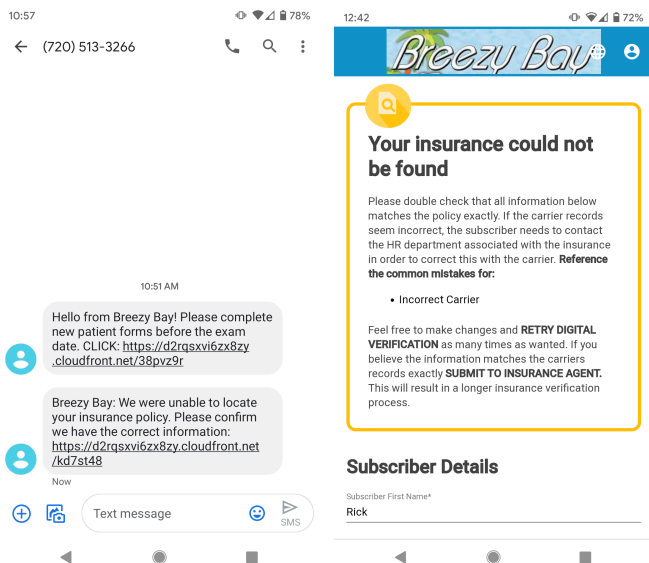


## What is an 'Unable to Verify' Text Message?

**Unable to Verify Insurance (UTV)** text messages are sent to a patient's primary contact when OrthoFi is unable to verify or locate an insurance policy. The text message will include the name of the practice and a link to log in to OrthoFi to correct their insurance information. Here are a few reasons that a policy would end up in a UTV status:

- Incorrect Subscriber Name/DOB
- Incorrect Patient Name/DOB
- Incorrect SSN/Member Number
- Incorrect Carrier



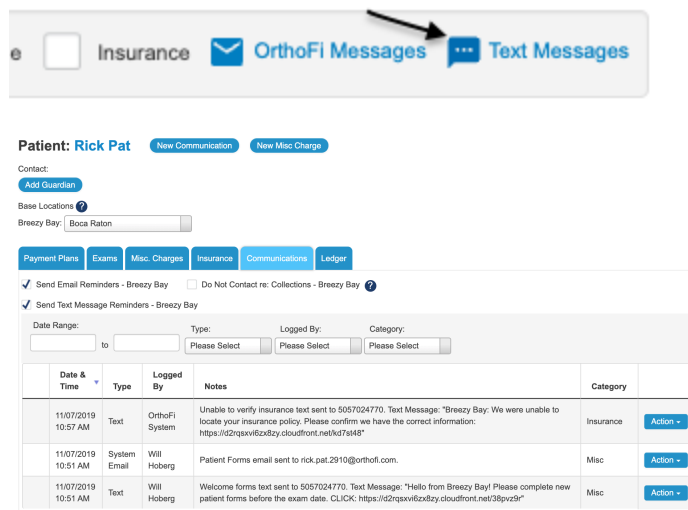
## How do UTV text messages work?

UTV text messages are automatically sent to the primary contact for insurance policies that are in an "Unable to Verify" status. The system checks every 10 minutes to determine whether a UTV message should be sent.

- **First Message:** Once a policy is marked as "Unable to Verify," a text message is sent to the primary contact 10 minutes later.
- **Rechecks:** If new information is provided and the policy is rechecked but remains in the "Unable to Verify" status, another message will be sent 10 minutes after the recheck.
- **Timing:** UTV messages are only sent between 8:00 AM and 6:00 PM local time.

UTV text messages will only be sent to patients that have registered an account with OrthoFi. Once users register and complete their forms, they will see the insurance information that needs to be updated.

A log of each text will be posted in the Communications tab on the patient's record. The text messages will also be available in the text message inbox.



## What if my primary contacts don't want to receive texts?

OrthoFi maintains a few options for primary contacts to opt out of receiving text messages from a practice. *Note: All patients connected to that primary contact will be opted out.*

**Option 1)** The primary contact can opt out by responding directly to one of the text messages with any of the industry standard terms for opting out - Stop, Cancel, Unsubscribe, End, Quit, or StopAll.

**Option 2)** The practice can manually perform the opt-out in OrthoFi. For UTV texts, the practice can uncheck the "Send Text Message Reminders" checkbox on the Communications tab within the existing patient record. This will also opt the primary contact out of text reminders to complete their forms.

**Option 3)** The practice can choose to turn off all unable to verify text messaging for all primary contacts by making a request through your OrthoFi Success Manager or by calling into OrthoFi support.