

OrthoFi:

*Auto Follow-Up
&
Verbatim
Messaging*

Set Follow-Up Type

AUTOMATED FOLLOW-UPS **NEW**

FOLLOW-UP REMINDER

Pending Patient Follow-Up Schedule

The schedule is a mix of automatic text and email messages sent to pending patients/guardians on your behalf, and also, call reminders for a personalized touch. It will stop when either the recipient takes an action or you turn it off.

Auto Follow Up: *Touchpoint: 1/10* *Day 1*

OrthoFi Action: Text Message

1. Review Your Payment Plan

Touchpoint 1 out of 10

Send Date

Saturday, October 29, 2022

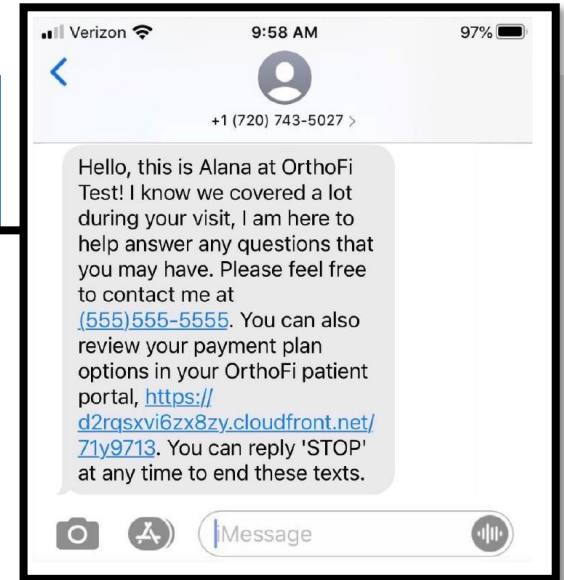
Follow-Up Type

TEXT

Text Message

Hi, this is Helen at Elevation Orthodontics! I know we covered a lot during your visit. I'm here to help answer any questions so please feel free to text me at this number, or review payment plan options in your OrthoFi portal, [http://patient.demo.orthofi.com/treatmentpaymentplan/customize/51093?](http://patient.demo.orthofi.com/treatmentpaymentplan/customize/51093?utm_source=Elevation+Orthodontics&utm_campaign=stock-campaign-preview&utm_medium=campaign-sms)
[utm_source=Elevation+Orthodontics&utm_campaign=stock-campaign-preview&utm_medium=campaign-sms](http://patient.demo.orthofi.com/treatmentpaymentplan/customize/51093?utm_source=Elevation+Orthodontics&utm_campaign=stock-campaign-preview&utm_medium=campaign-sms).
Reply STOP to opt out.

CLOSE



Auto Follow Up: *Touchpoint: 2/10* *Day 3*

Practice Action:

*Call reminder via the
"Follow Up" filter.*

2. Follow-Up Call 1

Touchpoint 2 out of 10

Send Date

Monday, October 31, 2022

Follow-Up Type

 CALL REMINDER

**Note: Call reminders will show-up on the follow-up tab on the date they are scheduled, prompting you to call the patient.*

CLOSE

Auto Follow Up: *Touchpoint: 3/10* *Day 6*

OrthoFi Action:

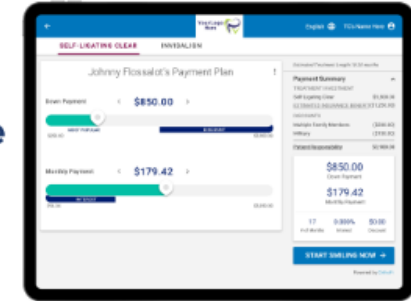
Email Message for *Adult Patient*



Dear _____,

I know we covered a lot during your visit, so if there's anything that I can help answer for you regarding your treatment recommendations or the financial information we went over, please don't hesitate to call.

**Your NEW smile
starts here!**



With or without insurance, we pride ourselves on never letting affordability stand in the way of receiving your best smile. At Elevation Orthodontics, you can customize your payment plan by selecting a down payment and monthly payment that works best for YOUR budget, and we'll take care of the rest.

To get started, [CLICK HERE!](#)

We know how busy you are and can help make starting treatment as easy and convenient as possible. If you're ready to get started, just give us a call and we'll reserve your next appointment right away.

Thank you for considering our office and I hope to hear from you soon!

Sincerely,

Helen Jensen
Treatment Coordinator



Elevation Orthodontics
10463 Park Meadows Drive
Lone Tree, Colorado 80124
(720) 555-5555

If you no longer wish to receive these emails, you can [unsubscribe](#).

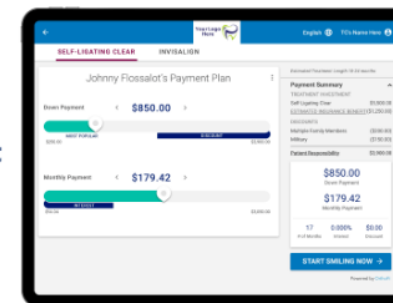
Auto Follow Up: *Touchpoint: 3/10* *Day 6*



Dear

I know we covered a lot during your visit, so if there's anything that I can help answer for you regarding treatment recommendations or the financial information we went over, please don't hesitate to ask.

**Choose the best
treatment option
for your child
& design a payment
plan that fits into
your budget.
It's that easy.**



With or without insurance, we pride ourselves on never letting affordability stand in the way of your child receiving a beautiful, healthy smile. At Elevation Orthodontics, you can customize your payment plan for Layla by selecting a down payment and monthly payment that works best for ***YOUR*** family's budget, and we'll take care of the rest.

To get started, [CLICK HERE!](#)

We know how busy you are and can help make starting treatment as easy and convenient as possible. If you're ready for Layla to get started, just give us a call and we'll reserve your next appointment right away.

Thank you for considering our office and I hope to hear from you soon!

Sincerely,

Helen Jensen
Treatment Coordinator



Elevation Orthodontics
10463 Park Meadows Drive
Lone Tree, Colorado 80124
(720) 555-5555

If you no longer wish to receive these emails, you can [unsubscribe](#).

OrthoFi Action:
Email Message for
Adolescent Patient

Auto Follow Up: *Touchpoint: 4/10* *Day 14*

OrthoFi Action: *Text Message*

4. Customize For Your Budget

Touchpoint 4 out of 10

Send Date

Friday, November 11, 2022

Follow-Up Type

TEXT

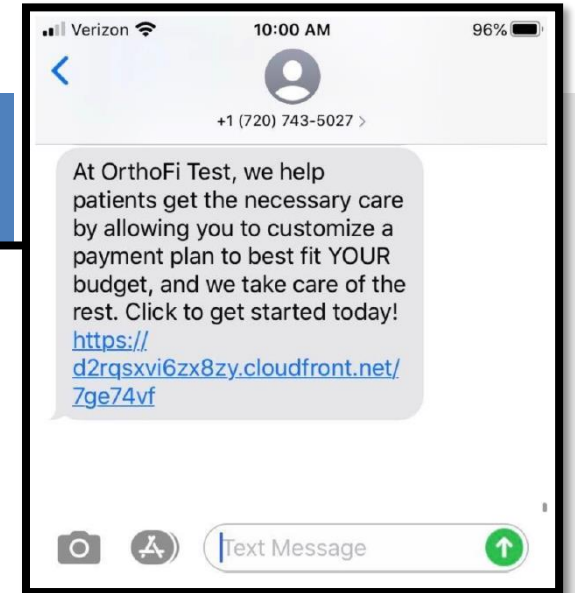
Text Message

At Elevation Orthodontics, we help patients get the necessary care by allowing you to customize a payment plan to best fit YOUR budget, and we take care of the rest. Click to get started today!

[http://patient.demo.orthofi.com/treatmentpaymentplan/customize/51093?](http://patient.demo.orthofi.com/treatmentpaymentplan/customize/51093?utm_source=Elevation+Orthodontics&utm_campaign=stock-campaign-preview&utm_medium=campaign-sms)

[utm_source=Elevation+Orthodontics&utm_campaign=stock-campaign-preview&utm_medium=campaign-sms](http://patient.demo.orthofi.com/treatmentpaymentplan/customize/51093?utm_source=Elevation+Orthodontics&utm_campaign=stock-campaign-preview&utm_medium=campaign-sms)

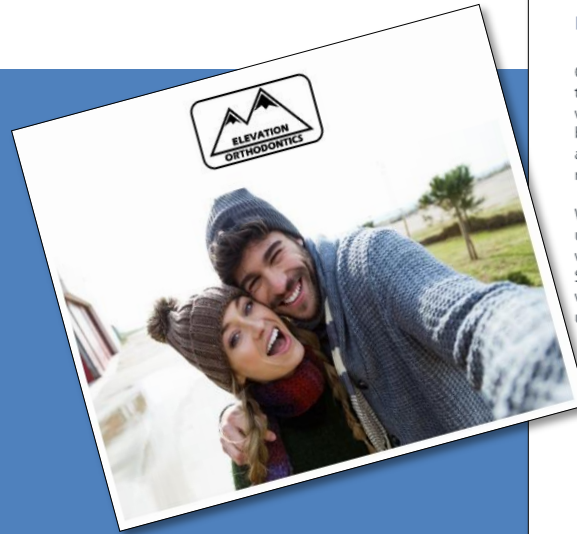
CLOSE



Auto Follow Up: *Touchpoint: 5/10* *Day 21*

OrthoFi Action:

Email Message for *Adult Patient*

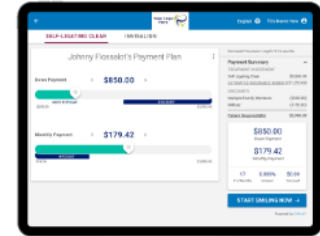


Did you know that **71% of women** and **58% of men** agree that a great smile is the first thing they notice in a potential partner?

One of the first things that many people notice when meeting someone new is their smile. A beautiful, healthy smile can make a big impact on your life and when it comes to first impressions, people with straight teeth are perceived as being more attractive, successful, and even more intelligent. Everybody wants a beautiful, healthy smile, but perfectly straight teeth don't often come naturally.

With Elevation Orthodontics, you don't have to settle for a shy smile. We understand that choosing to get your teeth straightened is a big decision and we respect your reasons for wanting to improve the way you look and feel. Straightening your teeth can help you feel more confident at any age and we'll work with you every step of the way to make sure your orthodontic care with us is the among the best investments you've ever made.

**You Deserve Your
Best Smile!**



With or without insurance, we pride ourselves on never letting affordability stand in the way of receiving your best smile. At Elevation Orthodontics, you can customize your payment plan by selecting a down payment and monthly payment that works best for YOUR budget, and we'll take care of the rest.

To get started, [CLICK HERE!](#)

We know how busy you are and can help make starting treatment as easy and convenient as possible. If you're ready to get started, just give us a call and we'll reserve your next appointment right away.

Thank you for considering our office and I hope to hear from you soon!

Sincerely,

Helen Jensen
Treatment Coordinator



Elevation Orthodontics
10463 Park Meadows Drive
Lone Tree, Colorado 80124
7205555555

If you no longer wish to receive these emails, you can [unsubscribe](#).

Auto Follow Up: *Touchpoint: 5/10* *Day 21*

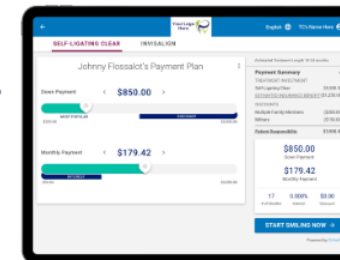
OrthoFi Action: *Email Message for* *Adolescent Patient*



Studies have found that teens who aren't happy with their smile are also insecure about their overall appearance. Children with crooked teeth often become embarrassed about their smile, which can cause them to cover their mouths, smile awkwardly or with their lips closed, or even avoid speaking altogether. Straight teeth can provide a major boost to a child's self-esteem, which can improve their confidence, lead to better performance in school, and make it easier to meet new friends.

With Elevation Orthodontics, Layla will never have to settle for a shy smile. We understand just how important your child's smile is in their development and will be there every step of the way to make sure their orthodontic care with us is the among the best investments you've ever made.

**Being a teen is hard.
Being able to afford
their BEST smile
doesn't have to be.**



With or without insurance, we pride ourselves on never letting affordability stand in the way of your child receiving a beautiful, healthy smile. At Elevation Orthodontics, you can customize your payment plan for Layla by selecting a down payment and monthly payment that works best for **YOUR** family's budget, and we'll take care of the rest.

To get started, [CLICK HERE!](#)

We know how busy you are and can help make starting treatment as easy and convenient as possible. If you're ready for Layla to get started, just give us a call and we'll reserve your next appointment right away.

Thank you for considering our office and I hope to hear from you soon!

Sincerely,

Helen Jensen
Treatment Coordinator



Elevation Orthodontics
10463 Park Meadows Drive
Lone Tree, Colorado 80124
7205555555

If you no longer wish to receive these emails, you can [unsubscribe](#).

Auto Follow Up: *Touchpoint: 6/10* *Day 31*

Practice Action:

*Call reminder via the
“Follow Up” filter.*

6. Follow-Up Call 2

Touchpoint 6 out of 10

Send Date

Monday, November 28, 2022

Follow-Up Type

 CALL REMINDER

**Note: Call reminders will show-up on the follow-up tab on the date they are scheduled, prompting you to call the patient.*

CLOSE

Auto Follow Up: *Touchpoint: 7/10* *Day 36*

OrthoFi Action:

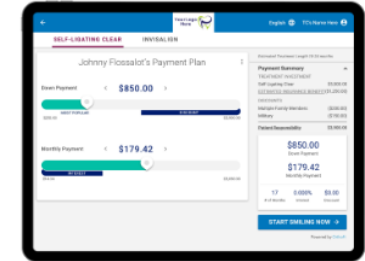
Email Message for *Adult Patient*



Leaving misaligned teeth untreated may lead to other dental problems such as tooth decay, gum disease, abnormal wearing of tooth enamel and difficulty chewing. Orthodontic treatment creates a better bite, making teeth fit better and decreasing the risk of future dental problems regardless of age.

Elevation Orthodontics uses the most advanced technologies to make orthodontic treatment more comfortable and less noticeable than ever to fit any lifestyle for individuals of all ages. Now that's something to smile about!

**Your BEST smile
doesn't have to
be a compromise!**



It's never too late to get your best smile and at Elevation Orthodontics, we'll work with you every step of the way to make sure your orthodontic care is the among the best investments you've ever made.

With or without insurance, we pride ourselves on never letting affordability stand in the way or receiving the quality orthodontic treatment. You can customize your payment plan by selecting a down payment and monthly payment that works best for YOUR budget, and we'll take care of the rest.

To get started, [CLICK HERE!](#)

If you're ready to get started, we can help make starting treatment as easy and convenient as possible. Just give us a call and we'll reserve your next appointment right away.

Thank you for considering our office and I hope to hear from you soon!

Sincerely,

Helen Jensen
Treatment Coordinator



Elevation Orthodontics
10463 Park Meadows Drive
Lone Tree, Colorado 80124
7205555555

If you no longer wish to receive these emails, you can [unsubscribe](#).

Auto Follow Up: *Touchpoint: 7/10* *Day 36*

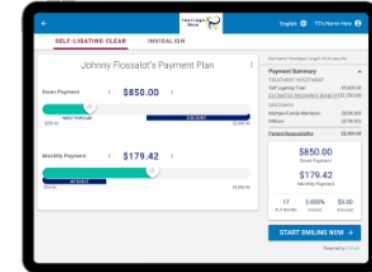


OrthoFi Action: *Email Message for* *Adolescent Patient*

Whether interviewing for their first job or just looking to make a good first impression, your child's smile may have more of an effect on what others perceive about them than you think. Studies have proven over and over again the advantages of having a straight, healthy smile. People with straight teeth are perceived as being more successful, intelligent, and even having better overall health.

Straight teeth can help your child feel more confident and at Elevation Orthodontics, we use the most advanced technologies to make orthodontic treatment more comfortable and less noticeable than ever.

**YOUR CHILD'S
CONFIDENT
NEW SMILE
STARTS HERE!**



With or without insurance, we pride ourselves on never letting affordability stand in the way of your child receiving a beautiful, healthy smile. At Elevation Orthodontics, you can customize your payment plan for Layla by selecting a down payment and monthly payment that works best for **YOUR** family's budget, and we'll take care of the rest.

To get started, [CLICK HERE!](#)

We know how busy you are and can help make starting treatment as easy and convenient as possible. If you're ready for Layla to get started, just give us a call and we'll reserve your next appointment right away.

Thank you for considering our office and I hope to hear from you soon!

Sincerely,

Helen Jensen
Treatment Coordinator



Elevation Orthodontics
10463 Park Meadows Drive
Lone Tree, Colorado 80124
7205555555

If you no longer wish to receive these emails, you can [unsubscribe](#).

Auto Follow Up: *Touchpoint: 8/10* *Day 50*

OrthoFi Action: *Text Message*

8. Last Text Attempt

Touchpoint 8 out of 10

Send Date

Saturday, December 17, 2022

Follow-Up Type

TEXT

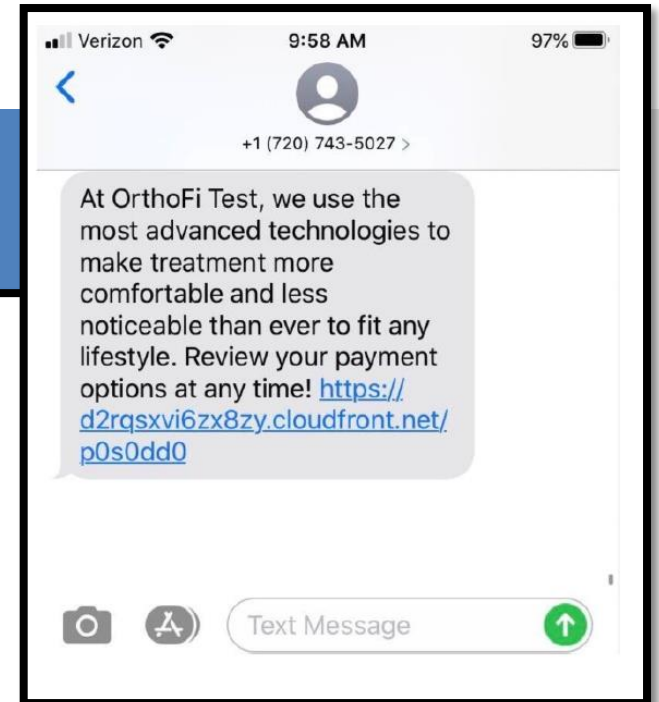
Text Message

At Elevation Orthodontics we use the most advanced technologies to make treatment more comfortable and less noticeable than ever to fit any lifestyle. Review your payment options at any time!

[http://patient.demo.orthofi.com/treatmentpaymentplan/customize/51093?](http://patient.demo.orthofi.com/treatmentpaymentplan/customize/51093?utm_source=Elevation+Orthodontics&utm_campaign=stock-campaign-preview&utm_medium=campaign-sms)

[utm_source=Elevation+Orthodontics&utm_campaign=stock-campaign-preview&utm_medium=campaign-sms](http://patient.demo.orthofi.com/treatmentpaymentplan/customize/51093?utm_source=Elevation+Orthodontics&utm_campaign=stock-campaign-preview&utm_medium=campaign-sms)

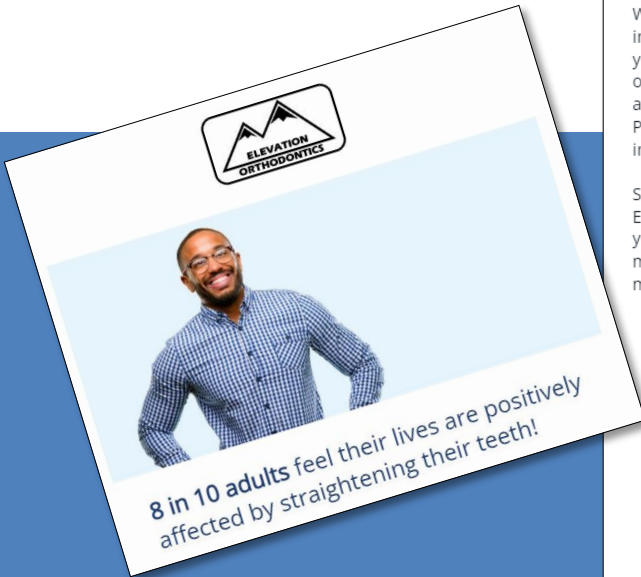
CLOSE



Auto Follow Up: *Touchpoint: 9/10* *Day 56*

OrthoFi Action:

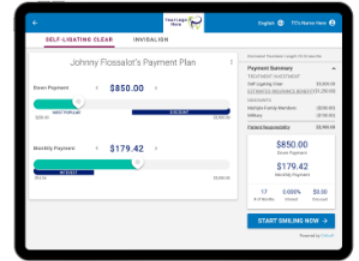
Email Message for *Adult Patient*



Whether interviewing for a new job or just looking to make a good first impression, your smile may have more of an effect on what others think about you than you realize. Studies have proven over and over again the advantages of having a straight, healthy smile when it comes to job opportunities, the amount of money you make and even the people you attract into your life. People with straight teeth are perceived as being more successful, attractive, intelligent, and even having better overall health.

Straightening your teeth can help you feel more confident at any age, and at Elevation Orthodontics, we'll work with you every step of the way to make sure your orthodontic care with us is among the best investments you've ever made. We use the most advanced technologies to make orthodontic treatment more comfortable and less noticeable than ever to fit any lifestyle.

**Let us help you
make the
best investment
you'll ever make.
YOUR SMILE!**



With or without insurance, we pride ourselves on never letting affordability stand in the way of receiving your best smile. At Elevation Orthodontics, you can customize your payment plan by selecting a down payment and monthly payment that works best for YOUR budget, and we'll take care of the rest.

To get started, [CLICK HERE!](#)

We know how busy you are and can help make starting treatment as easy and convenient as possible. If you're ready to get started, just give us a call and we'll reserve your next appointment right away.

Thank you for considering our office and I hope to hear from you soon!

Sincerely,

Helen Jensen
Treatment Coordinator



Elevation Orthodontics
10463 Park Meadows Drive
Lone Tree, Colorado 80124
7205555555

If you no longer wish to receive these emails, you can [unsubscribe](#).

NOTE: Elevation Orthodontics and "OrthoFi Test" are DEMO practices used for training purposes. Your practice name and logo will display in these areas.

Auto Follow Up: *Touchpoint: 9/10* *Day 56*

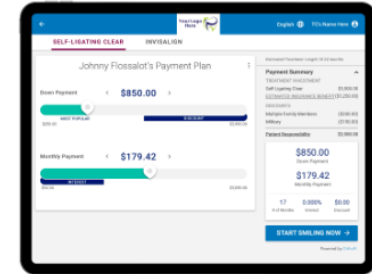


OrthoFi Action: *Email Message for* *Adolescent Patient*

Did you know leaving misaligned teeth untreated may lead to other dental problems such as tooth decay, gum disease, abnormal wearing of tooth enamel and difficulty chewing? Orthodontic treatment creates a better bite, making teeth fit better and decreasing the risk of future dental problems regardless of age.

Elevation Orthodontics uses the most advanced technologies to make orthodontic treatment more comfortable and less noticeable than ever to fit your child's lifestyle. Now that's something to smile about!

**Your BEST smile
doesn't have to
be a compromise!**



With or without insurance, we pride ourselves on never letting affordability stand in the way of your child receiving a beautiful, healthy smile. At Elevation Orthodontics, you can customize your payment plan for Layla by selecting a down payment and monthly payment that works best for **YOUR** family's budget, and we'll take care of the rest.

To get started, [CLICK HERE!](#)

We know how busy you are and can help make starting treatment as easy and convenient as possible. If you're ready for Layla to get started, just give us a call and we'll reserve your next appointment right away.

Thank you for considering our office and I hope to hear from you soon!

Sincerely,

Helen Jensen
Treatment Coordinator



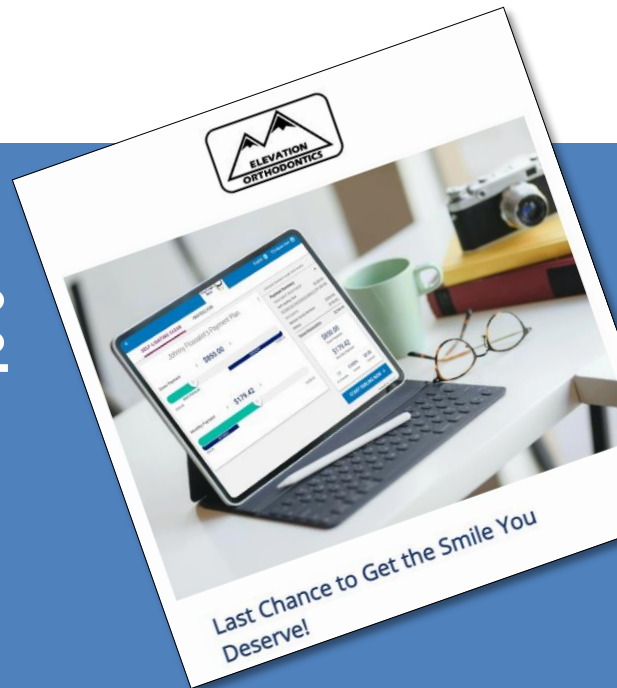
Elevation Orthodontics
10463 Park Meadows Drive
Lone Tree, Colorado 80124
7205555555

If you no longer wish to receive these emails, you can [unsubscribe](#).

Auto Follow Up: *Touchpoint: 10/10* *Day 76*

OrthoFi Action:

Email Message for *Adult Patient*

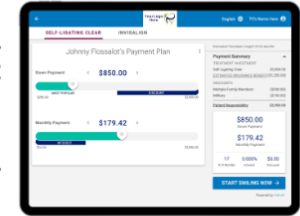


At Elevation Orthodontics, we understand that choosing to get your teeth straightened is a big decision. The investment you make on your orthodontic treatment will be one of the most important you'll ever make on yourself.

When you decide to start treatment at Elevation Orthodontics, you can feel confident in knowing that you've chosen a team of knowledgeable experts committed to giving you the stunning smile you've always wanted. Whether it be conventional braces, clear aligners, or Invisalign, we use the most advanced technologies to make orthodontic treatment more comfortable and less noticeable than ever to fit any lifestyle for individuals of all ages.

We'll work with you every step of the way to make sure your orthodontic care with us is among the best experiences you've ever had.

**YOUR BEST SMILE
HAS NEVER BEEN
MORE
AFFORDABLE!**



With or without insurance, we pride ourselves on never letting affordability stand in the way of receiving quality orthodontic treatment. You can customize your payment plan by selecting a down payment and monthly payment that works best for **YOUR** budget, and we'll take care of the rest.

[CLICK HERE!](#) to customize your payment plan!

I know we covered a lot of information during your visit, so if there's anything that I can help answer regarding treatment recommendations or the financial information that I went over with you, please don't hesitate to ask.

Once you're ready to get started, your next visit will be relatively brief, so just give us a call and I'll reserve that time accordingly.

Thank you for considering our office and I hope to hear from you soon!

Sincerely,

Helen Jensen
Treatment Coordinator



Elevation Orthodontics
10463 Park Meadows Drive
Lone Tree, Colorado 80124
7205555555

If you no longer wish to receive these emails, you can [unsubscribe](#).

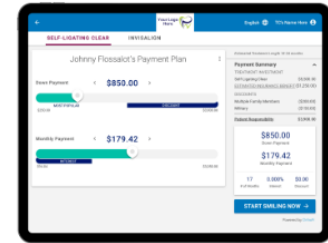
Auto Follow Up: *Touchpoint: 10/10* *Day 76*



Choosing where to get your child's teeth straightened is a big decision and the investment you make on your child's orthodontic treatment will be one of the most important you'll ever make. At Elevation Orthodontics, you can feel confident in knowing that you've chosen a team of knowledgeable experts committed to giving your child the stunning smile they deserve. Whether it be conventional braces, clear aligners, or invisalign, we use the most advanced technologies to make orthodontic treatment more comfortable and less noticeable than ever to fit any child's lifestyle.

We'll work with your family every step of the way to make sure your child's orthodontic care with us is among the best experiences they've ever had.

**Your child's
BEST SMILE
has never been
more affordable!**



With or without insurance, we pride ourselves on never letting affordability stand in the way of your child receiving a beautiful, healthy smile. At Elevation Orthodontics, you can customize your payment plan for Layla by selecting a down payment and monthly payment that works best for **YOUR** family's budget, and we'll take care of the rest.

[CLICK HERE!](#) to your customized payment plan!

I know we covered a lot of information during Layla's visit, so if there's anything that I can help answer regarding treatment recommendations of the financial information that I went over with you, please don't hesitate to call.

Once you're ready to get started, Layla's next visit will be relatively brief, so just give me a call and I'll reserve that time accordingly.

Thank you for considering our office and I hope to hear from you soon!

Sincerely,

Helen Jensen
Treatment Coordinator



Elevation Orthodontics
10463 Park Meadows Drive
Lone Tree, Colorado 80124
7205555555

If you no longer wish to receive these emails, you can [unsubscribe](#).

OrthoFi Action:

Email Message for Adolescent Patient