

Team Management

WHAT

Team Management allows you to manage your practice's users and their permissions.

WHY

Customize what your team can see and do. Permit or restrict your users' locations, reports, and permissions.

HOW

Click the Team Management button at the top of your OrthoFi homepage.



Team Members

[ADD TEAM MEMBER](#)

Please select an organization or practice

Organization Practice ▼ Elevation Orthodontics ▼ Search

Name	Email/Username	Role	Practice	Status
David Lamm	david.lamm@orthofi.com	Doctor	Elevation Orthodontics	Active
Donna Lamm	doctorlamm@orthofi.com	Doctor	Elevation Orthodontics	Active
Helen Jensen	Elev.tc1@orthofi.com	Treatment Coordinator (Manager)	Elevation Orthodontics	Active

ADD AND/OR MANAGE USERS

- Click on a user to edit their account
- Click RESET PASSWORD if staff member forgets their password
- Click ADD TEAM MEMBER to add a new user
- Select Locations and Permissions

SELECT A ROLE FOR THE USER

- Treatment Coordinator
- Doctor
- Staff

Role *

STAFF TREATMENT COORDINATOR DOCTOR

User needs manager permissions [?](#)

ADD AND/OR MANAGE USERS

- Click on a user to edit their account
- Click RESET PASSWORD if staff member forgets their password
- Click ADD TEAM MEMBER to add a new user
- Select Locations and Permissions

SELECT PERMISSIONS AND/OR APPLY PERMISSION TEMPLATE

Glossary of permissions on next page

User Permissions Glossary

User Management

- **Rights Management**

- Allows access to control all user permissions
- Recommend for Practice Manager

Contract Adjustments

- **Manage Invoices**

- Allows the user to make changes to invoicing schedules such as adjusting future, payment dates, payment amounts, suspend invoicing schedules, etc.
 - Recommend for Treatment Coordinator or Financial Coordinator user.

- **Refinance Contract**

- Allows the user to make changes to a contract such as removing interest, changing the number of payments, and changing the monthly payment amount.
- Recommend for Treatment Coordinator or Financial Coordinator user.

- **Manage Costs and Courtesies**

- Allows the user to apply an additional cost or courtesy/discount to an active contract. If the Refunds option is checked, the user will be able to refund these items on the contract.

- **Manage Refunds**

- Allows the user to refund a payment as well as specific items on a contract as part of a contract change.
- Recommend for Practice Manager users.

- **Refund Late Fees**

- Allows the user to refund an automated late fee charged by OrthoFi
- Recommend for Practice Manager users.

- **Manage Write-Offs**

- Allows the user to write off a contract balance. If the Refunds option is checked, the user will be able to refund specific items on the contract.
- Recommend for Business Practice Manager users.

- **Reinstate Contract**

- Allows the user to activate a previously suspended contract/payment plan.
- Recommend for Business Practice Manager users.

- **Manage Down Payments**

- Allows the user to change a down payment amount after the contract has been signed.
- Recommend for Business Practice Manager users.

- **Refund Late Fees**

- Allows the user to refund an automated late fee charged by OrthoFi
- Recommend for Practice Manager users.

User Permissions Glossary (con't)

- **Manage Treatment Options**

- Allows the user to change a treatment option (metal braces, Invisalign, etc.) on an active contract. If the with Refunds option is selected, the user will be able to refund specific amounts as part of this contract change.
- Recommend for Business Practice Manager users.

Fee Presentation

- **Slider Customizations**

- Allows the user to make on-the-fly slider customizations such as remove the pay in full discount, change the down payment minimum, change the interest period, etc.
- Recommend for Treatment Coordinator user.

OrthoInsights

- **Insurance AR Aging**

- Allows the user to access the Insurance A/R Aging Report

- **Claim Status**

- Allows the user to access Claim Status Report

Reports

- **Deposit Report**

- Allows the user to access all collections deposited into your account from OrthoFi on a weekly basis

- **Service Fees**

- Allows the user to access service fee information your practice is being charged for OrthoFi services

- **Day Sheet**

- Allows the user to access daily accounting of in-office cash and check payments

- **Delinquent Report**

- Allows the user to access past due patient accounts including amount and days past due contract terms

- **Insurance Reconciliation**

- Allows the user to access Explanation of Benefits by patient showing payments that OrthoFi has processed from insurance carriers, including payments for Non-OrthoFi patients

- **Starts Report**

- Allows the user to access patient level detail of all starts and production for the practice.

User Permissions Glossary (con't)

Exam Management

- **Adjust Exam Result**
 - Allows the user to adjust the exam result after it has been set to treatment recommended.
- **Integrated Admin**
 - EMERGENCY USE ONLY. Manually creating exams and patients when integrated will create duplicates in OrthoFi. Please contact integrations@OrthoFi.com prior to adding this permission to practice users.

Treatment Details

- **Treatment Fees**
 - Allows the user to make changes to the Treatment Fees section of Treatment Details.
- **Courtesies**
 - Allows the user to make changes to the Courtesies section of Treatment Details.