



# nexhealth

## **NexHealth Connect - Staff Job Aid**

NexHealth integration automatically migrates patient and exam data into OrthoFi from your PMSW and automatically manages your OrthoFi schedule.

The first step is to make sure the NexHealth Synchronizer is set up with your PMSW. If it is installed, nothing else is needed for the first step. If it is not installed, someone from OrthoFi's Integrations Team will reach out with additional instructions.

## **Practice Staff Tips & Changes to Workflow**

Please ensure that all members of your team have a copy of this guide prior to activating the integration. There will be changes to your daily process and it is important that the entire practice staff is aware of them.

### **Manage Your Schedule in the PMSW Only**

**Do not schedule, reschedule, cancel, or change exam times in OrthoFi.**

Once your connection is activated, you will not be able to add patients directly into OrthoFi, they must be added to your PMSW.

### **Only Included Exam Codes Will Import to OrthoFi**

During the setup process, your practice requested specific New / Observation / Recall Ready / Phase 2 exam codes from your PMSW to automatically transfer into OrthoFi.

All patients will import to the system, but only patients with mapped exam codes will show on the OrthoFi Dashboard. Clinical appointments or post-treatment visits, where the patient will not see a TC, will not import to OrthoFi.

#### **Treatment Coordinator**

- **Do not add or adjust exams in OrthoFi**
- **Schedule next appointment in your PMSW only**
- No changes to Tx Details or Slider
- Continue to put Start/Records Date in OrthoFi
- If an Obs patient is ready to schedule their next visit, no exam result is needed - simply schedule the next visit in the PMSW only.
- If an Obs patient isn't ready to schedule their next visit, enter the exam result as 'Observation' in OrthoFi and set a Follow Up Date in OrthoFi.

#### **Front Desk**

- **Do not add or adjust exams in OrthoFi**
- Collect Guardian DOB on new PT call
- Manage the schedule in PMSW only
- Update PT/Guardian info in PMSW only
- Enter insurance into OrthoFi

#### **Misc. Charges**

- Search for patient in OrthoFi
- All patients from your PMSW are added to OrthoFi when the connection is activated
- Add miscellaneous charges in OrthoFi

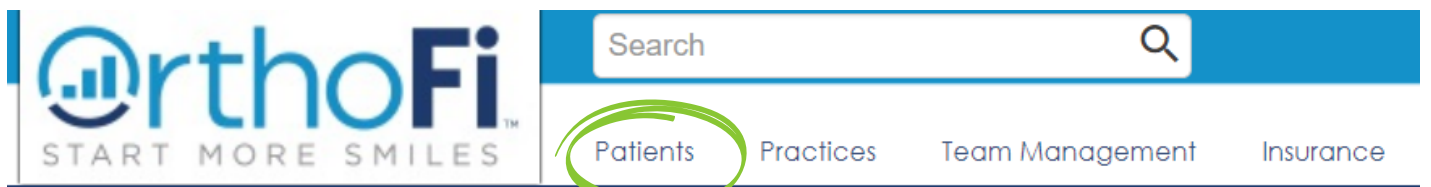
## Add Insurance into OrthoFi

Insurance information does not communicate between your PMSW and OrthoFi, so you will need to add insurance information directly to OrthoFi. Since OrthoFi manages your insurance, you only need to add this information into OrthoFi.

### How to Add Insurance Into OrthoFi

Every patient imported from your PMSW will have a Patient Detail Page in OrthoFi.

**Click Patients -> Use the patient search bar -> Click on Patient**



Patients [+ New Patient](#)

#### Patient Info

Patient Name

Email

Elevation Ortho...

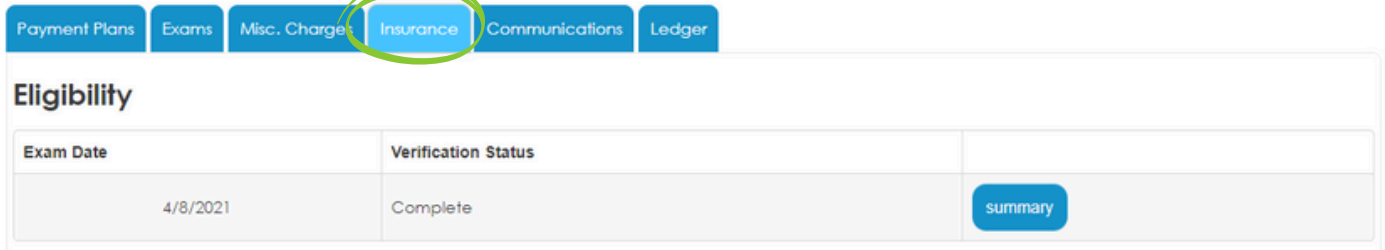
Lone Tree

[Search](#)

Showing 0 of 0 Results

Age	Location	Status	Additional Details	Upcoming	Follow-Up
No records found					

**Click on the Insurance tab -> Click +Add New Insurance**



[+ Add New Insurance](#)

[+ Add & Replace Insurance](#)

No Insurance available for this exam

# **Treatment Coordinator Flow Chart**

There will be changes to your exam process - this outlines the steps to take during exams.

## **Manage Your Schedule in Your PMSW Only**

**Do not schedule, reschedule, cancel, or change exam times in OrthoFi**

### **TC Need-to-Knows**

- **Only recommend treatment if the patient is ready to start**
- Schedule next appointment in PMSW only
- OrthoFi Follow-Ups do not connect to your PMSW
- There are no changes to insurance process, Treatment Details, or Slider
- Continue to put Start/Records Date in OrthoFi via slider or Action button

### **Observation Patients**

- If an Obs patient is ready to schedule their next visit, no exam result is needed - simply schedule the next visit in PMSW only.
- If an Obs patient is not ready to schedule their next visit, enter 'Observation' as the exam result in OrthoFi and set a Follow Up Date in OrthoFi.

## **Changes to Appointment Settings or Providers/TCs**

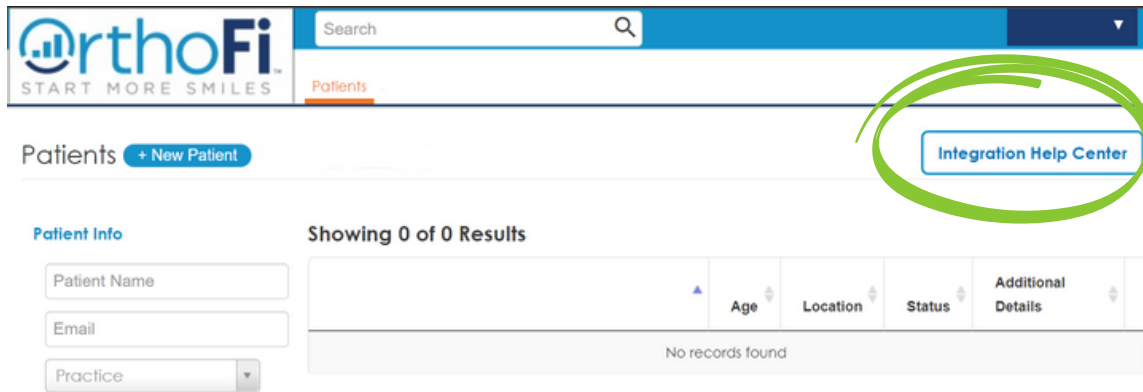
**Need to request changes to your appointment settings, staff, or doctors?**

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

# Integration Help Center

## What does the Help Center do?

- Check connection status to determine if your PMSW is communicating to OrthoFi
- Search for Patients location appointment history, Patient ID, and DOB
- Import Patients that didn't automatically import
- View detailed appointment history to see how your PMSW and OrthoFi appointments are connected to each other
- Check to see if any information in OrthoFi was manually adjusted



## 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

## 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  
 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 from your PMSW 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
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.