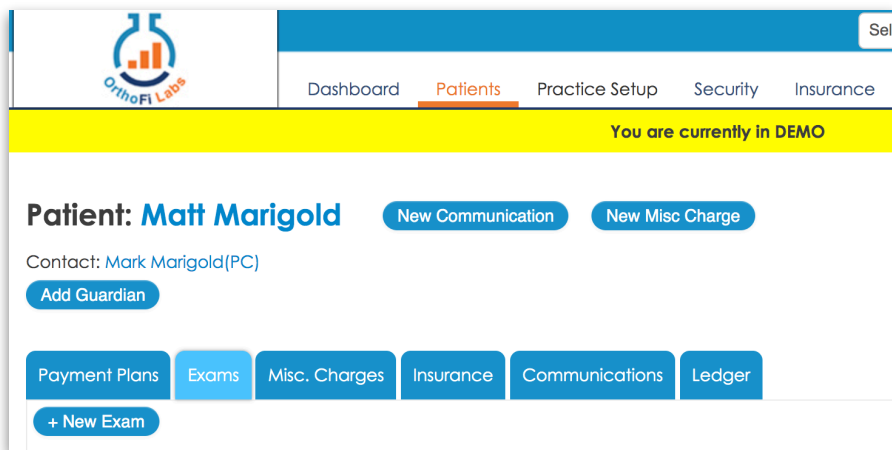


## Patient Account Management & Updates

After a patient is created in OrthoFi, you may need to update pieces of information for that patient or their Primary Contact. Follow the steps below to make these updates.

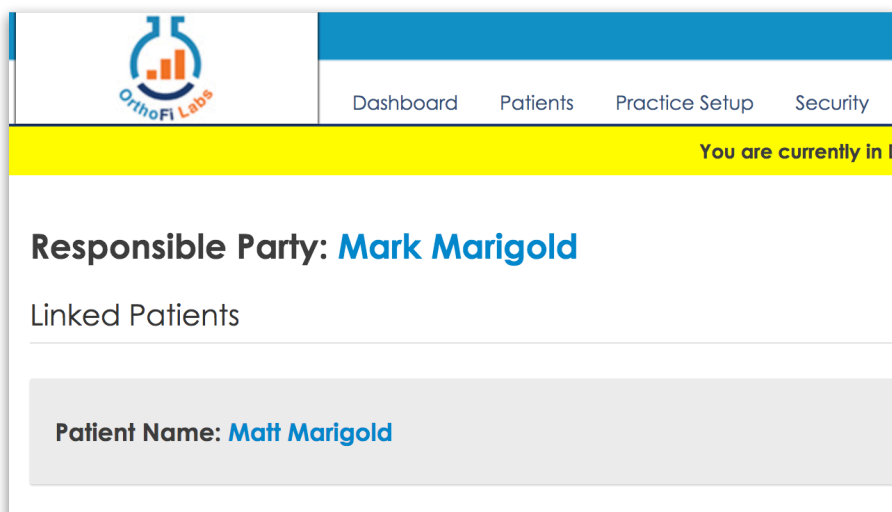
1. From the **Patient Detail** page, click on the **Primary Contact (PC)** name below the patient.

**Note:** This will update the primary contact information. To update only the patient, click on the *Patient name*.



The screenshot shows the OrthoFi Labs interface. The top navigation bar includes Dashboard, Patients (highlighted), Practice Setup, Security, and Insurance. A yellow banner indicates "You are currently in DEMO". The main content area displays "Patient: Matt Marigold" with buttons for "New Communication" and "New Misc Charge". Below this, it shows "Contact: Mark Marigold(PC)" and an "Add Guardian" button. A row of buttons includes "Payment Plans", "Exams", "Misc. Charges", "Insurance", "Communications", and "Ledger". A "+ New Exam" button is located at the bottom left.

2. The **Responsible Party** page shows any linked patients (siblings). Click on the **Primary Contact** name again to proceed to their **Account Management** page.



The screenshot shows the OrthoFi Labs interface for the Responsible Party page. The top navigation bar includes Dashboard, Patients, Practice Setup, and Security. A yellow banner indicates "You are currently in DEMO". The main content area displays "Responsible Party: Mark Marigold". Below this, it shows "Linked Patients" and a list of linked patients, with "Patient Name: Matt Marigold" visible in a grey box.

3. Update the fields as needed. Click Save.

**Note:** If a patient has not filled out their forms because the email was incorrect, you will need to update the email, click **Save**, and then resend the Welcome Email from the **Action** button on the **Dashboard**.

The screenshot shows the OrthoFi Labs interface. At the top, there is a navigation bar with 'Dashboard', 'Patients', 'Practice Setup', and 'Security'. A yellow banner below the navigation bar reads 'You are currently in'. The main content area is titled 'Account Management - Mark Marigold'. The form contains the following fields and options:

- Email / User Name:** parent.newforms@orthofi.com
- Has Registered?:** No
- First Name:** Mark
- Middle Name:** (empty)
- Last Name:** Marigold
- Suffix:** (empty)
- Preferred Name:** (empty)
- Date of Birth:** 01/01/1980
- Gender:**  Male  Female
- Address:** 123 Main St
- Address 2:** (empty)
- City:** Denver
- State:** Colorado
- Zip:** 80202
- Country:** United States
- Social Security Number:** (empty)
- Primary Phone:** (888)888-8888
- Primary Phone Type:** Select...
- Secondary Phone:** (empty)
- Secondary Phone Type:** Select...

At the bottom of the form, there are three buttons: 'Back', 'Reset Password', and 'Save'.