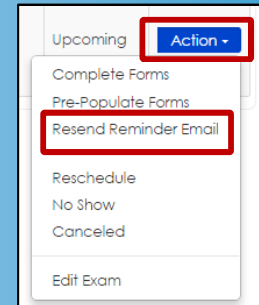


Patient Exam Management

- To help you resend the Patient Welcome email.
- To help you manage changes to a patient's scheduled exam date including Reschedules, Cancelations, and Patient No Shows.

1 How do I Resend the OrthoFi Patient Welcome Email?

- Locate the patient on the Dashboard or with a patient name search
- Click the **Action** button and select the **Resend Reminder Email** option
- A pop up message confirms the email was sent and the sent email is logged in the Communication tab

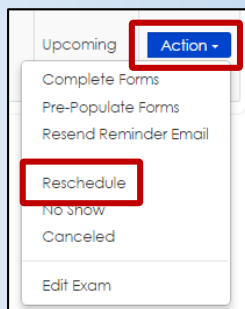


If the **Resend Reminder Email** option is light gray, there is no email address on file.
Contact the Primary Contact to request an email address.

2 How do I Reschedule a Patient Exam Date?

- Reschedule the exam date in your **Practice Management Software**
- In **OrthoFi**, locate the patient on the Dashboard or with a patient name search
- Click the **Action** button and select the **Reschedule** option
- Confirm that the **Reschedule Exam** box is checked
- Select the Reschedule **Date**
- Select the Reschedule **Time**
- Record **Scheduling Notes**
- Click the **Submit** button

The Patient will display in the **Today** filter on the rescheduled date you selected and your scheduling notes are logged in the Communication tab.

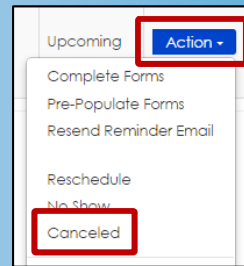
A screenshot of a software interface showing a form titled 'Exam Management'. The form has a close button (X) in the top right corner. Below the title, there are two radio buttons: 'Reschedule Exam' (checked) and 'Set Follow-Up'. Below this is a section titled 'Select Exam Date and Time to Reschedule'. There are two input fields: 'Select a Date' with the value '09/16/2015' and a calendar icon, and 'Select a Time' with the value '10:00 AM' and a clock icon. Below these is a text area for 'Scheduling Notes' with the text 'Stuck in Traffic rescheduled|date'. At the bottom right is a green 'Submit' button with a right arrow.

Patient Exam Management

3 How do I Cancel a Patient Exam Date?

- Cancel the exam date in your **Practice Management Software**
- In **OrthoFi**, locate the patient on the Dashboard or with a patient name search
- Click the **Action** button and select the **Canceled** option
- Confirm that the **Set Follow-Up** box is checked
- Select a **Reason**
- Select the **Follow-Up Date**
- Record **Scheduling Notes**
- Click the **Submit** button

The Patient will display in the **Follow-Up** filter on the follow-up date you selected and your scheduling notes are logged in the Communication tab.



4 How do I Mark a Patient as a No Show?

- Record the no show in your **Practice Management Software**
- In **OrthoFi**, locate the patient on the Dashboard or with a patient name search
- Click the **Action** button and select the **No Show** option
- Confirm that the **Set Follow-Up** box is checked
- Select a **Reason**
- Select the **Follow-Up Date**
- Record **Scheduling Notes**
- Click the **Submit** button

