

Answers to Patient Questions



- To help you answer common OrthoFi related questions.
- To help you introduce OrthoFi to your patients.

1 Introduce OrthoFi and the Patient Forms Email on the New Patient Phone Call

- ~ We're really looking forward to meeting you on _____.
- ~ You will be **receiving an email from OrthoFi**, on behalf of Dr. _____.
- ~ Included in this email is a **secure link** to register your account and **complete your Patient Forms**.
- ~ Please complete these forms online prior to your appointment; if you are unable to do so, please arrive 15 minutes early to avoid delaying your appointment and to maximize your time with the doctor.

2 What is a Soft Medical Credit Verification?

- ~ A soft medical credit verification is a medical credit check used to help provide you the most flexible financing options for your orthodontic treatment.
- ~ It **does not impact your credit score** or show up on your credit history reports to anyone other than yourself.

3 Why Do You Need My Social Security Number?

- ~ We use your Social Security Number to verify insurance coverage with the insurance provider.
- ~ If the doctor recommends treatment we may use your Social Security Number to perform a soft medical credit verification to help provide you the most flexible financing options.

4 Can You Reset My Password?

- ~ I can send you an email that will help you reset your password.
- ~ **You are also able to reset your password** by logging into your account, clicking the My Account link and setting the new password.

5 Is the OrthoFi System Secure?

- ~ Doctor _____ believes in OrthoFi's ability to protect your private information and keep it safe and secure.
- ~ OrthoFi maintains HIPAA and PCI (Payment Card Industry) compliance.
- ~ They use Triple DES (Data Encryption Standard) data encryption and keep a log of every change and updated data point for reference.
- ~ Every piece of data is encrypted three times using a complex algorithm.

6 Who is OrthoFi and Why Are They Sending Me Emails?

- ~ OrthoFi is an extension of our practice who helps us securely collect patient information and manage patient accounts.
- ~ You will receive emails and other communications from OrthoFi on behalf of our practice.
- ~ You will see OrthoFi listed as the merchant on your credit card statements for the Down Payment and Monthly Payments.

- For the New Patients:
 - OrthoFi simplifies the secure online collection of patient information
- During the New Patient exam:
 - OrthoFi allows the patient to customize a Payment Plan for their treatment
- After treatment has started:
 - OrthoFi empowers patients to manage their account within a secure online portal

7 Does the Primary Contact or the Financially Responsible Party Have to be the Same as the Insurance Subscriber?

- ~ No, the Primary Contact, the Financially Responsible Party, and Insurance Subscriber do not need to be the same person.
- ~ Mom can be the Financially Responsible Party who signs the Service Contract, and the insurance can be in Dad's name.

8 Make Appointment Confirmation Calls to Remind Patient of the Future Appointment and to Increase the Completion of Patient Forms Prior to the Appointment

- ~ We are excited to see you for your appointment with Doctor _____ on _____ at _____.
- ~ You recently received an email from our partner OrthoFi with a secure link to collect your patient information, health history, and insurance.
- ~ It's important that these forms are completed before your visit so if the doctor recommends treatment, we'll be ready to get started.
- ~ If you are not able to complete them at home please arrive 20 minutes early so we can gather this information prior to the time of your actual appointment.
- ~ Can you be here at _____?
- ~ Thank you we look forward to seeing you.

9 Collect and Pre-Populate Patient Insurance During the Patient Call

Insurance information can be collected in both the New Patient Phone call or the Appointment Confirmation call and Pre-populated using the Action button on the Dashboard.

- ~ Is there insurance you would like us to verify prior to your appointment?

- Click the **Action** button for the Patient on the Dashboard and select the **Pre-Populate Forms** Option
- Enter all relevant information gathered on the Patient Call or Appointment Confirmation Call
- Click the **Add Insurance** button to enter information for OrthoFi to verify insurance benefits
- Click the **Save** button