OrthoFi:
New Hire Onboarding

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OrthoFi Kickoff

Agenda

- Why OrthoFi?
- Contracts and Payments
- How does OrthoFi work with Orthotrac?
- Training
- OrthoFi Support
- What we’ve learned!
- Preparing for your first patient day

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Why OrthoFi?

Why OrthoFi?

- Collects key patient information before a visit (insurance, medical history, etc)
- OrthoFi team will check insurance eligibility before the patient visit
- Streamlines the contracting process and allows the patient/responsible party to select down payment/monthly payment amounts using a payment slider.
- OrthoFi team will handle all claim submission and follow-up.
- Provides a patient portal for easy access to invoices, forms, etc.
- Interactive reporting – Starts, New Patient Exams, Conversion Rates

Goals

- Provide more flexibility for the parent/patient to increase starts
- Leverage the soft credit check to ensure we're taking on the right patients/contracts
- Reduce AR by using the OrthoFi team to manage the revenue cycle from eligibility checking through claims submission and collections.

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Contracts and Payments

What Contracts /Payments should go in OrthoFi?

- OrthoFi considers a ‘New Patient’ to be anyone not already under a contract for treatment. Additionally, one-time payments for miscellaneous charges should be entered in OrthoFi. Examples below:
    - Patients who came for a consult and have scheduled to start (Pre-OrthoFi patient).
    - Patients who came for a consult but haven’t decided yet (Pre-OrthoFi patient).
    - Patients who came for a consult but were placed on Recall or Observation.
    - Patients who completed Phase I and are Phase II-Pending.
    - Patients who completed treatment previously but have returned for additional (payable) services, such as a Retreat or replacement retainers.
    - Patients who completed treatment previously but have returned for products, such as a whitening kit or toothbrush.

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How does OrthoFi work with Orthotrac?

OrthoFi reduces the paperwork so you can focus on your patients.

- Online New Patient Paperwork – compatible with all desktop and hand-held devices
- Electronic contract signing - from anywhere!
- Needs Attention and Follow-Up filters to identify missed opportunities
- Automatic follow-ups for patients with recommended treatment but no appointment.
- Patient billing statement transmission and follow up
- Claim transmission and follow up

OrthoFi is only as good as the information we give them.

- To ensure accurate billing by OrthoFi, new contract patients will need to be entered into both Orthotrac and OrthoFi.
- Demographic and consult/banding appointment changes will also need to be updated in both Orthotrac and OrthoFi.

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Training

Who needs training?

- Practice Managers, Treatment Coordinators, and Front Office Coordinators.

How do I attend training?

- Training consists of two, 4-hour Zoom training sessions (recordings)
  - Training should be done in an office setting, not from home, car, etc.
  - Watch Session 1, complete OrthoFi University modules 1-10, then watch Session 2.
  - After both sessions, use the Demo environment to practice new patient entry, complete new patient paperwork, practice building a treatment plan/contract, using the payment slider and Sign @ Home.

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OrthoFi Support

OrthoFi Support

- Support Button within OrthoFi
- OrthoFi University (registration required)
- Support Team
    - Phone: 877-766-5220
    - Email: support@orthofi.com *non-urgent, allow 48-hour response time.
    - Hours of Operation

      Mon- Thur 8 a.m. – 8:30 p.m. (EST)

      Fridays 8 a.m. – 7 p.m. (EST)

- If a timely response is not received or an escalation is required, a ticket should be sent to ithelpdesk@d4c.com

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What we've learned!

Key Takeaways

- OrthoFi essentially replaces the Orthotrac ledger for all 'New Patients.' Don't remember what that means? That's ok! A 'New Patient' is anyone not already under a contract/payment plan for treatment.

Frequently Asked Questions

- Will I have to enter <u>all</u> information in OrthoFi and Orthotrac?
  - No. Basic patient and responsible party information, and their consult/records/banding appointment date will need to be entered in <u>both</u> OrthoFi and Orthotrac.
  - Insurance information in OrthoFi only.
  - All future appointments and clinical information in Orthotrac only.
- Will <u>all</u> patient forms be signed in OrthoFi?
  - New Patient Paperwork, Medical History and HIPAA are to be completed in OrthoFi.
  - Consent for Treatment and Photo Release will still need to be signed in the office and scanned into Orthotrac as normal.
- If an OrthoFi patient pays in cash, where do we post the payment?
  - If the balance exists in OrthoFi, then all payments should be posted in OrthoFi.
  - At the end of the day, you'll pull a "Day Sheet" report to reconcile the cash processed via OrthoFi.
    And deposit the cash in the bank as normal.

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Preparing for your first patient day

Access & Training

- Access to the Live environment
  - PM to request OrthoFi access via D4C IT ticket or by calling OrthoFi Support. (2 weeks prior to start date).
- Session 1 and 2 recorded trainings
  - PM to provide link to Dropbox and advise which recordings should be watched (based on region and practice management software).
- OrthoFi University modules 1-10
  - OrthoFi access will automatically trigger enrollment in OrthoFi University (allow 5-7 days).
  - If needed sooner, PM can email training@orthofi.com or call 877-766-5220 to request OFU access. (allow 48-hours).
- Practice in Demo environment
  - PM to provide the demo link and your practice's login and password.

Devices

- Each location has a minimum of 2 Chromebooks. One for Front Desk and one for the TC/Consult room. They're pre-programmed with the OrthoFi portal and linked to your Wi-Fi.
- The login and password were previously provided with each device. One per location. Please keep them in a safe place.
  - Contact IT Help Desk if the login/password is not received or does not work.

Registration

- Each new team member will receive an OrthoFi Welcome email.
  - They must click the link in the email to setup a password and pin.
- Each new team member will receive an OrthoFi University Registration email.
  - They must click the link in the email to setup a password.

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