

# OrthoFi Reporting Tools



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- Today's call is to explain and answer any questions that apply to OrthoFi reporting.
- You will learn where to find the report and how to read it accurately.
- Gain understanding of how to use conversion as a tool to diagnose skills/behaviors or areas of focus.

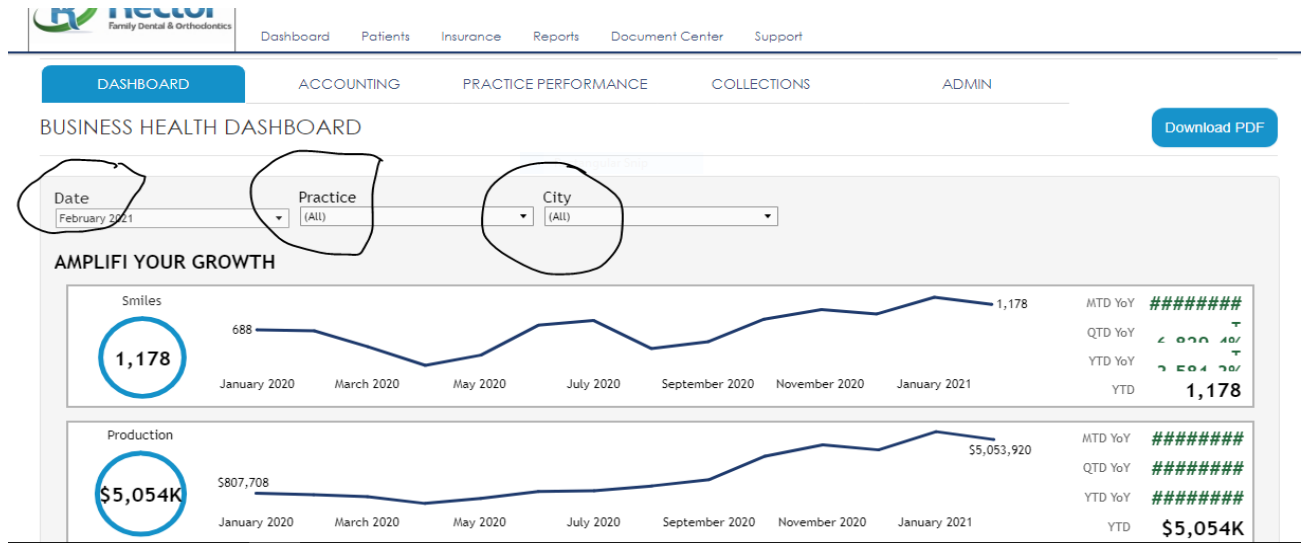
# OrthoFi Metric Definitions

- Smiles = Number of Patients that signed a contract for treatment
- Production = Treatment Cost + Total Additional Expense – Selected Discount – Total Courtesies
- Kept NPE = Number of New Patients who Kept their New Patient Exam
- % Kept NPE = The number of patients who kept their new patient exam divided by the number of patients who scheduled a new patient exam
- Same Day Smiles = The number of Patients that signed their contract the day of their exam divided by the number of smiles
- Same Day Cash = Down Payment + Pay In Full divided by Patient Responsibility  
Patient Responsibility = Production - Insurance

- TRC (TREATMENT RECOMMENDED CONVERSION) = The number of patients who started treatment when treatment was recommended divided by the number of patients who were recommended treatment
- 45 Day TRC - Patients who were recommended treatment 45 days ago or less and started within that time frame (best measure of conversion)
- 90 Day TRC - Patients who were recommended treatment 90 days ago or less and started within that time frame
- 180 Day TRC - Patients who were recommended treatment 180 days ago or less and started within that time frame
- 365 Day TRC - Patients who were recommended treatment 365 days ago or less and started within that time frame

# Reporting

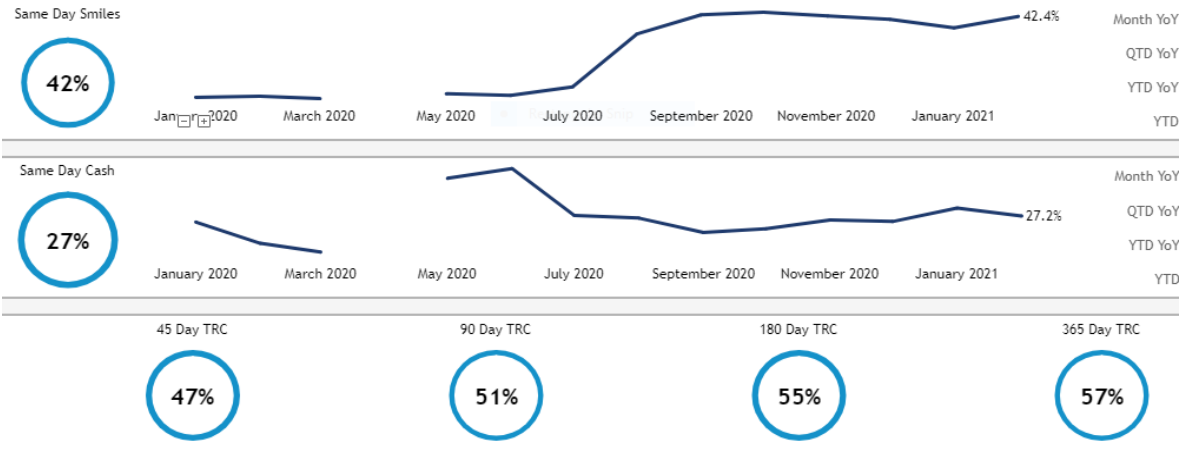
- Choose “Reports” from the OrthoFi dashboard
- View the company recap.
- Filter the Practice and City to view your center’s results.
- Ask yourself how your center compares to the company?



# Reporting

- Snap shot of Same Day Smiles (Starts)

- 45/90/180/365 Day TRC



# Treatment Recommended Count (TRC)=Conversion

- Conversion is retroactive. Example: Patient comes for consult in January. Patient does not put a deposit down and sign their contract until March. Credit for the start will be given in March. Conversion increase will not show for March but instead be credited to January.
- Chances of converting a patient decrease by 40% if patient doesn't start same day.
- **Focus 45 day conversion TOTAL.** Track 30 day to help diagnose behaviors and areas of opportunity.
- New Patient TRC: Building urgency? Making a connection and building trust? Having a solid financial conversation and providing the patient a stagey to move forward?
- If no treatment is recommended and the patient is placed on observation/recall it **DOES NOT** count as a TRC since no treatment was recommended.

# Practice Performance > Conversion

Practice Performance >  
Conversions > Filter  
month/year >Filter Brand  
> Practice Location

May choose to filter a  
specific Doctor or TC

Run Report

The screenshot shows a web application interface for generating a conversion report. At the top, there are navigation tabs: DASHBOARD, ACCOUNTING, PRACTICE PERFORMANCE (highlighted in blue), COLLECTIONS, and ADMIN. Below the tabs is a filter section with the following elements:

- Month: dropdown menu showing "Month"
- February: dropdown menu showing "February"
- 2021: dropdown menu showing "2021"
- EXPORT: blue button
- EXPORT PDF: blue button
- Ashby Park Family ...: dropdown menu with a close icon (x)
- All Reporting Groups: dropdown menu
- Easley: dropdown menu with a close icon (x)
- Dr. Melissa Papio: dropdown menu with a close icon (x)
- Marjorie Garrett: dropdown menu with a close icon (x)

Below the filters, there is a link for "+ Advanced Filters" and a large blue "Run Report" button.

CONVERSIONS SUMMARY



# Practice Performance > Conversion

## CONVERSIONS SUMMARY

Case Acceptance With Phase 2: 100%

Case Acceptance Without Phase 2: 100%

	45-DAY TRC FROM 1/11/2021 THROUGH 2/24/2021			TRC FROM 2/1/2021 THROUGH 2/24/2021		
EXAM TYPE	Tx RECOMMENDED	STARTS	TRC	Tx RECOMMENDED	STARTS	TRC
NEW PATIENT	6	4	66.67%	4	2	50.0%
RECALL	3	3	100%	1	1	100%
PHASE 2	0	0	0%	0	0	0%
OBSERVATION	2	1	50.0%	1	1	100%
<b>TOTAL</b>	<b>11</b>	<b>8</b>	<b>72.73%</b>	<b>6</b>	<b>4</b>	<b>66.67%</b>

## DETAILS

# DO NOT FOCUS ON CASE ACCEPTANCE WITH OR WITHOUT PHASE 2

\*Many orthodontists don't include phase 2 treatment as a positive increase to their conversion. We know we must provide our patients with an amazing experience during Phase 1 for our patients to return to us for phase 2. For this reason we **do** count Phase 2 as a positive increase to conversion. For this reason do not focus on case acceptance with or without phase 2 when pulling the conversion report.

~~Case Acceptance With Phase 2: 59.78%~~

~~Case Acceptance Without Phase 2: 57.61%~~

	45-DAY TRC FROM 2/15/2021 THROUGH 3/31/2021			TRC FROM 3/1/2021 THROUGH 3/31/2021		
EXAM TYPE	Tx RECOMMENDED	STARTS	TRC	Tx RECOMMENDED	STARTS	TRC
NEW PATIENT	79	40	50.63%	57	25	43.86%
RECALL	5	3	60.0%	4	2	50%
PHASE 2	2	2	100%	0	0	0%
OBSERVATION	11	3	27.27%	8	2	25.00%
<b>TOTAL</b>	97	48	49.48%	69	29	42.03%

## Practice Manager Orthodontic Support 101

**Patients** – Since our inception, we have been and remain focused on supporting doctors in providing the highest quality service and care for all Patients. Our integrated approach of pediatric, orthodontic and oral surgery services enables us to deliver a full spectrum of oral healthcare to the communities we serve.

**People** – We not only hire great People, we provide support, training and a safe environment for healthcare professionals to accomplish what they have a passion for – taking care of Patients.

**Providers** – The Providers we support are specialists in their respective field, but more importantly, they are passionate about the quality of service and commitment to the mission of helping their Patients achieve a life time of great oral health.

**Process** – Our best practices and solution oriented operational policies allow us to implement consistent Processes that deliver high quality services for the Providers we support and the Patients they treat.

**Performance** – By having a Patient centered focus, having incredible People on our team, a cadre of specialist Providers and proven Processes, we are confident that our Performance is second to none in the industry.

