

Cloud 9 Patient Import Troubleshooting Guide

Cloud 9 Connect will not allow you to import a patient unless all fields outlined in this guide are completed in Cloud 9.

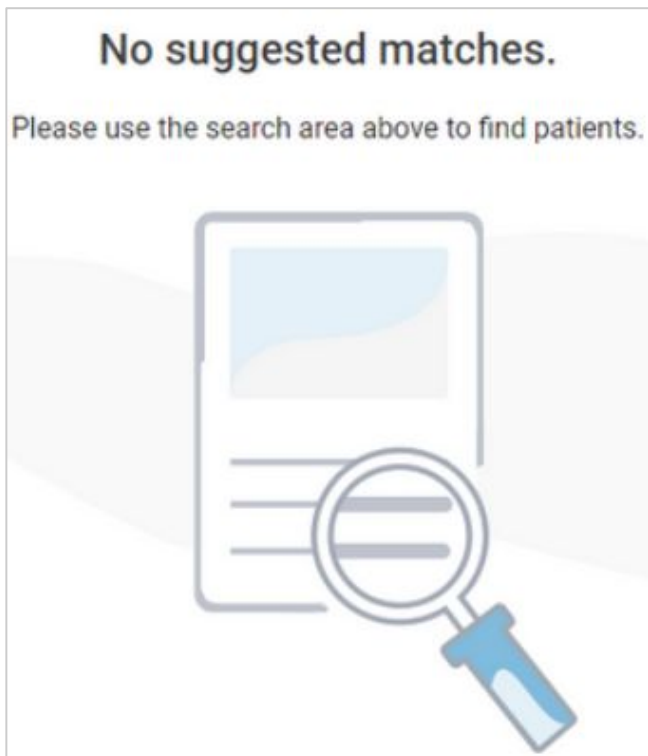
This guide will help you troubleshoot issues when you are unable to locate or import a patient using the **+Add Cloud9 Patient** button.

+ Add Cloud9 Patient

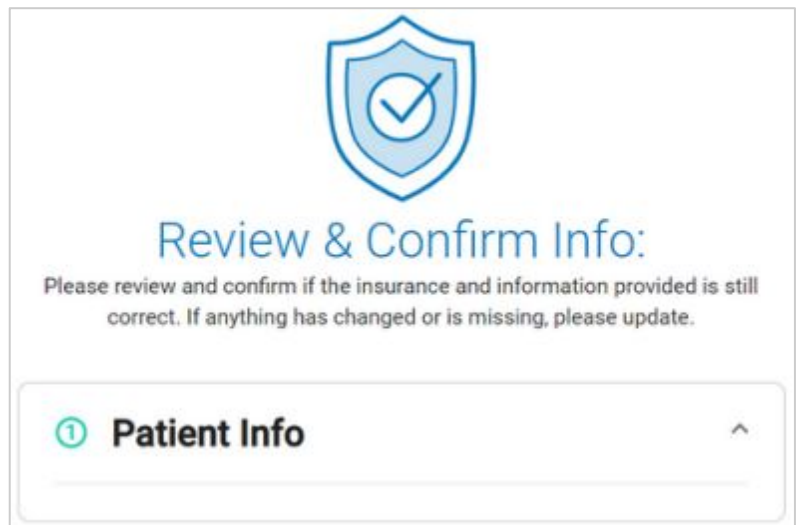
Step by Step Process

Note: Search using Patient ID for the fastest and most accurate results. If no results appear using Patient ID, or if the patient is located but nothing populates under the Patient Info tab, proceed to the troubleshooting steps below.

Example: No Search Results Appearing Using Patient ID



Example: Located Patient, but Nothing Populates Under the Patient Info Tab



Step 1: Check the Responsible Party Account in Cloud 9

- **Children:** Make sure Responsible Party has all highlighted fields completed
- **Siblings:** Link them to the same Responsible Party record as their siblings
- **Adults:** Mark them as Relationship Type = Self in Cloud 9

Financially Responsible

Relationship Type: Mother *<--- Change to "Self" for adult patients*

Title: *<--- Click here to link families*

First Name: Samantha

Middle Name:

Last Name: Johnson

Gender: Female *Gender --->* Suffix:

Greeting:

Birthdate: 07/04/1985 *Birthdate -->* Age: 36 years, 5 months

Social:

Correspondence: ☐ Phone ☐ Email ☐ Text

Addresses:

Street	City	State	Postal Code	Rank
123 Fake Street	Denver	CO	80209	1

Showing 1 to 1 of 1 rows

Contact Info:

Type	Description	Contact Info	SMS Carrier	Rank
E-Mail	Mom's Email	suziesmom123@email.com		1
Cell	Mom's Cell	(555) 555-5555		2

Showing 1 to 2 of 2 rows

Referrals & Professionals:

Referring Party	P/C	Profession	Relationship Type	Referred In/Out	Is Professional
No matching records found					

Make sure the email/phone are in this box, not "Description"

- The Responsible Party's **email** and **phone number** are both required to import the patient from Cloud 9.
- If the Responsible Party does **not** have an email address, please enter:
FirstName.LastName[Last 4 Digits of Phone]@orthofi.com
Example: John Doe = john.doe5555@orthofi.com
- Another common issue Cloud 9 users run into is putting email and/or phone number in the "Description" box instead of the "Contact Info" box, as highlighted above.

Step 2: Check the Patient account in Cloud 9

- Make sure the patient status is set in Cloud 9
- Make sure all highlighted fields are completed

The screenshot shows the 'Patient' form in Cloud 9. The form is titled 'Patient' in a blue header. The fields are as follows:

- Title: [Dropdown menu]
- First Name: Suzie
- Middle Name: [Empty]
- Last Name: Johnson
- Gender: Female (with handwritten note 'Gender ----> Gender')
- Suffix: [Empty]
- Greeting: [Empty]
- Birthdate: 04/01/2010 (with handwritten note 'Birthdate ----> Birthdate') and Age: 11 years, 8 months
- Social: [Empty]
- Correspondence: [Phone] [Email] [Text] (all unchecked)
- Addresses: [Table with columns: Street, City, State, Postal Code, Rank. No matching records found.]
- Contact Info: [Table with columns: Type, Description, Contact Info, SMS Carrier, Rank. No matching records found.]
- Provider: Dr. Connie Nienow
- Location: Maureen Isle (with handwritten note 'Don't forget the Provider and Location' pointing to these fields)

Now that you've confirmed all information has been added into Cloud 9, **save your work** and go back to OrthoFi and search using the Patient ID.

If you're still not able to import the patient, please contact Integrations@OrthoFi.com for further support.