

# 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.

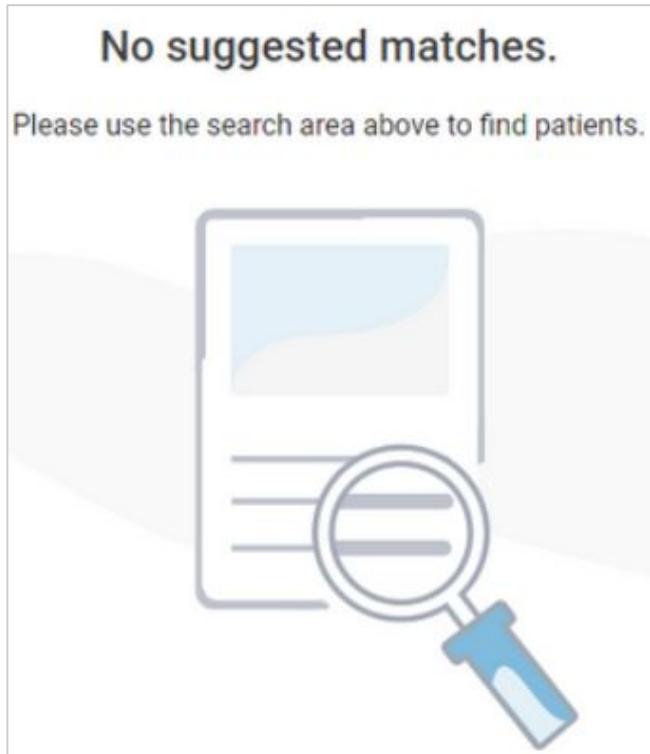
This guide will help you troubleshoot issues when you are unable to locate or import a patient using the **+Add Cloud9 Patient** button.

**+ Add Cloud9 Patient**

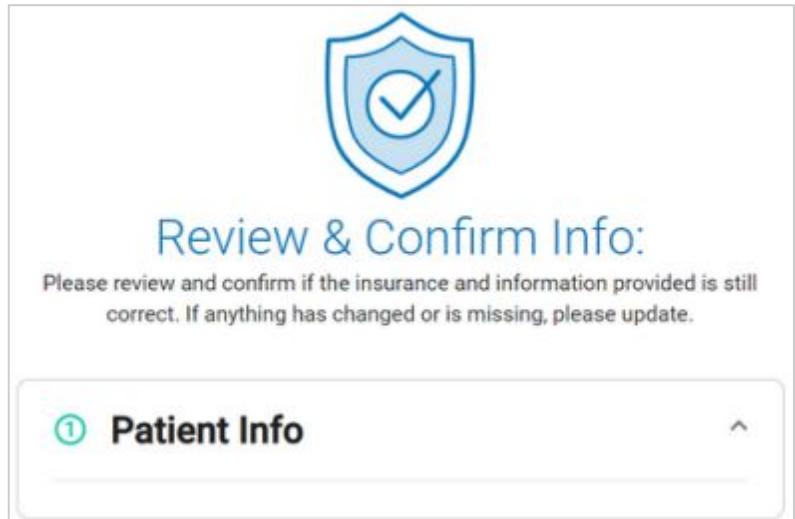
## Step by Step Process

**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		<a href="#">+</a>	<a href="#">🔍</a>	<-- Click here to link families															
First Name	Samantha																		
Middle Name																			
Last Name	Johnson																		
Gender	Female	Suffix																	
Greeting																			
Birthdate	07/04/1985	Age 36 years, 5 months																	
Social																			
Correspondence	<input type="checkbox"/> Phone <input type="checkbox"/> Email <input type="checkbox"/> Text																		
Addresses	<table border="1"> <tr> <th>Street</th> <th>City</th> <th>State</th> <th>Postal Code</th> <th>Rank</th> </tr> <tr> <td>123 Fake Street</td> <td>Denver</td> <td>CO</td> <td>80209</td> <td>1</td> </tr> </table> <p>Showing 1 to 1 of 1 rows</p>				Street	City	State	Postal Code	Rank	123 Fake Street	Denver	CO	80209	1					
Street	City	State	Postal Code	Rank															
123 Fake Street	Denver	CO	80209	1															
Contact Info	<table border="1"> <thead> <tr> <th>Type</th> <th>Description</th> <th>Contact Info</th> <th>SMS Carrier</th> <th>Rank</th> </tr> </thead> <tbody> <tr> <td>E-Mail</td> <td>Mom's Email</td> <td>suziesmom123@email.com</td> <td></td> <td>1</td> </tr> <tr> <td>Cell</td> <td>Mom's Cell</td> <td>(555) 555-5555</td> <td></td> <td>2</td> </tr> </tbody> </table> <p>Showing 1 to 2 of 2 rows</p>				Type	Description	Contact Info	SMS Carrier	Rank	E-Mail	Mom's Email	suziesmom123@email.com		1	Cell	Mom's Cell	(555) 555-5555		2
Type	Description	Contact Info	SMS Carrier	Rank															
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Referrals & Professionals	<table border="1"> <thead> <tr> <th>Referring Party</th> <th>P/C</th> <th>Profession</th> <th>Relationship Type</th> <th>Referred In/Out</th> <th>Is Professional</th> </tr> </thead> <tbody> <tr> <td colspan="6">No matching records found</td> </tr> </tbody> </table>				Referring Party	P/C	Profession	Relationship Type	Referred In/Out	Is Professional	No matching records found								
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No matching records found																			

- 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](mailto: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

Patient

Title:  + Search

First Name: **Suzie**

Middle Name:

Last Name: **Johnson**

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

Greeting:

Birthdate ---> Birthdate: **04/01/2010** Age: 11 years, 8 months

Social:

Correspondence:  Phone  Email  Text

Addresses: 

Street	City	State	Postal Code	Rank
No matching records found				

Contact Info: 

Type	Description	Contact Info	SMS Carrier	Rank
No matching records found				

Provider: **Dr. Connie Nienow**

Location: **Maureen Isle**

*Don't forget the Provider and Location*

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](mailto:Integrations@OrthoFi.com) for further support.**