Dolphin Integration
Setup Instructions
Job Aid

Congratulations on Your Upgrade to OrthoFi Connect!

To prepare your practice for launching the OrthoFi–Dolphin integration, there are a few setup steps that must be completed in **AnywhereDolphin** and **Dolphin Management**.

Most practices complete this setup in about **30 minutes**, but you will need to perform certain steps on **every computer** in the practice where OrthoFi will be used.

What This Guide Covers

This guide will walk you through how to:

- Authorize the OrthoFi integration in AnywhereDolphin
- Allow notifications from Dolphin Management
- Create the OrthoFi Financial Alert in Dolphin Management
- Create the OrthoFi Ledger Link button in Dolphin Management

Before You Begin

- These steps require access to **AnywhereDolphin** and **Dolphin Management**.
- You must have the appropriate permissions in Dolphin Management to complete setup.
- OrthoFi's call center cannot assist with Dolphin setup.

Need Help?

Dolphin Support

- 1-800-548-7241
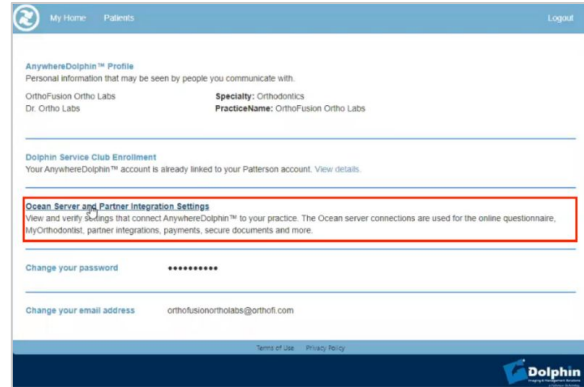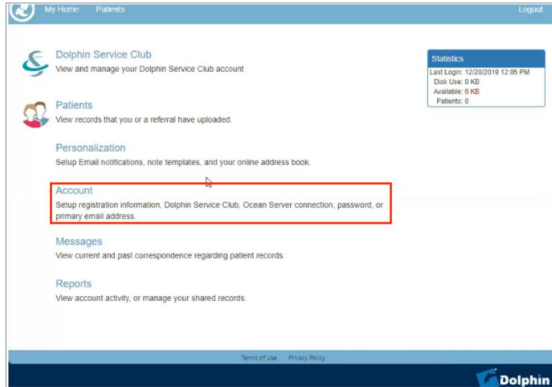- 5:00 AM – 6:00 PM (Mon–Fri, Pacific Time)

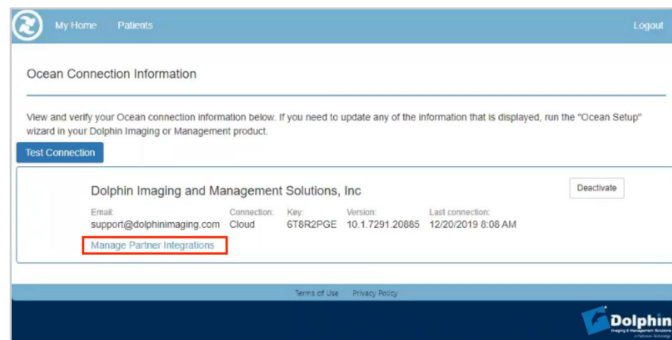**OrthoFi Integrations Team**

- integrations@orthofi.com

Step 1: Authorize the OrthoFi Integration in AnywhereDolphin

Before setup can continue, OrthoFi must be authorized to access your Dolphin services.
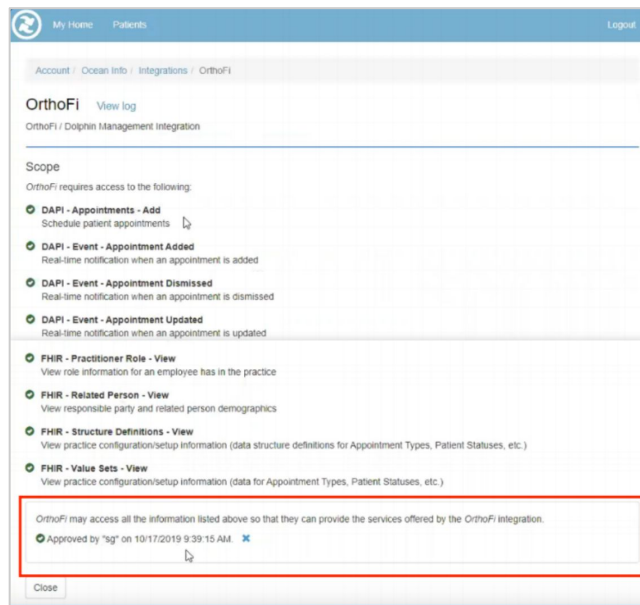
1. Log in to AnywhereDolphin.
2. Navigate to Account.
3. Select Ocean Server and Partner Integration Settings.

4. From the Ocean Connection Information screen, select Manage Partner Integrations.

5. Select OrthoFi.
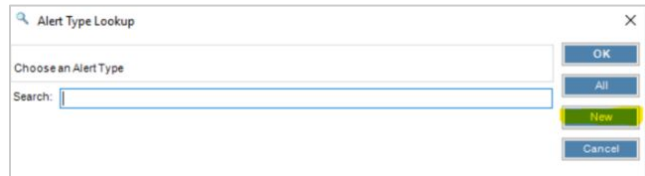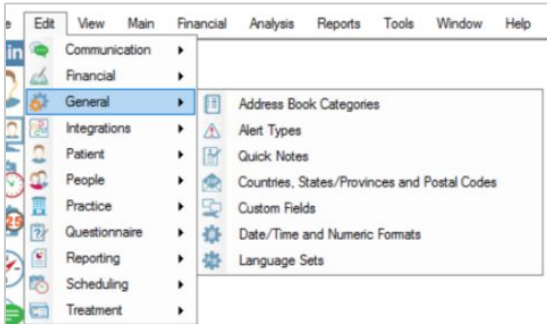6. Scroll to the bottom and approve the integration.

Step 2: Create the OrthoFi Financial Alert in Dolphin Management

Log in to **Dolphin Management** and create a new Financial Alert.

Alert Setup
- Go to Edit → General → Alert Types.
- Select **New** to open the Alert window.

General Tab Settings
- Name: OrthoFi Financial Alert (must match exactly)
- Description: Alert from OrthoFi for Patient Financials
- Icon:
  - Select Choose
  - Select Custom
  - Click OK
- Sound: N/A
- Display Type: Bot
- Priority: High
- Text entry required: Checked
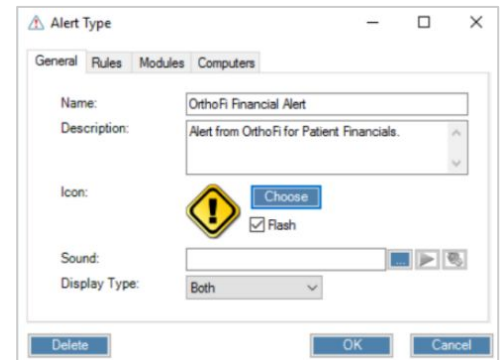
Selection Settings
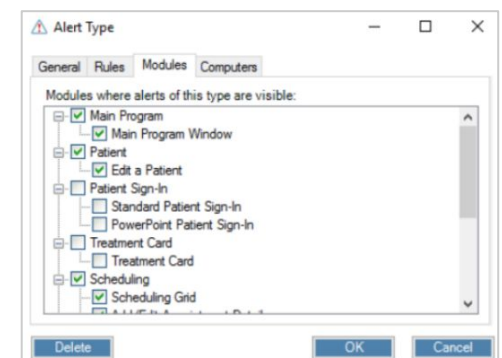- Patient Selection: Required
- Billing Party Selection: Optional
- Employee Selection: Disabled
- Duration Selection: Neither task nor date-based
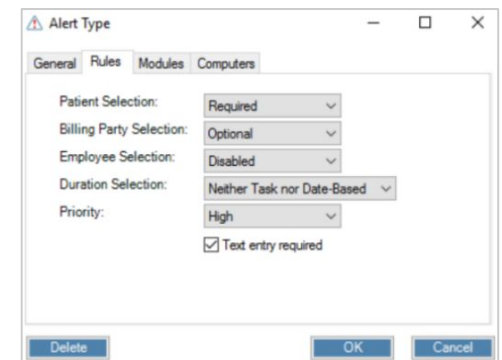
Modules Tab
Select **ONLY** the following modules:
- Main Program / Main Program Window
- Patient / Edit a Patient
- Scheduling / Scheduling Grid / Add/Edit Appointment
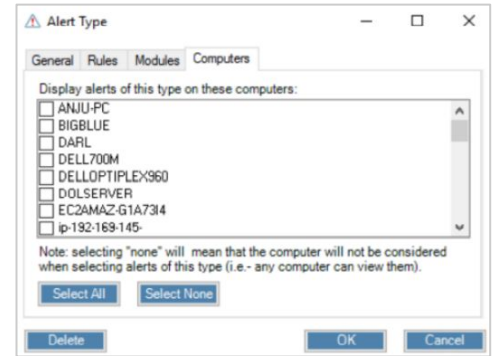- Details
- Checkout Wizard / Checkout Wizard

Make sure all other modules are unselected.

Computers Tab
1. Ensure no computers are selected.

Once complete, click OK to save the alert. If you need assistance with creating the Financial Alert, contact Dolphin Support.

Step 3: Create the OrthoFi Ledger Link Button in Dolphin Management

The OrthoFi Ledger Link allows staff to open a patient's OrthoFi ledger directly from Dolphin without logging in again.

How the Button Works
- When a patient profile is open in Dolphin, the button opens that patient's OrthoFi ledger.
- When no patient is selected, the button opens OrthoFi patient search.

⚠️ The Ledger Link button **will not be active until your integration launch date**. Clicking it before launch may result in an error message.

Before You Begin
- Close Dolphin Management.
- This setup must be completed on every PC where OrthoFi will be used.

Step 3A: Add the Ledger Link
1. Open C:\Dolphin or C:\Windows.
2. Locate Dolphin.ini (may appear as Dolphin with file type "Configuration Settings").
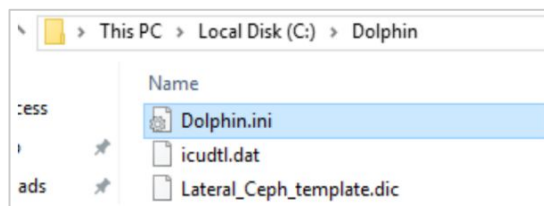
3. Right-click the file and open it with Notepad.
4. Scroll to the very bottom of the file, or search the file for "Toolbar." (looking for: [Toolbar])
5. Paste the **orange text** below under the [Toolbar] section in Notepad (DO NOT MODIFY).

OrthoFi=OrthoFi,Launch OrthoFi for a patient,C:\Dolphin\Buttons\orthofi.bmp,explorer "https://api.orthofusion.orthofi.com/dolphin/redirects/patientLedger/{PatientGUID}"

⚠️ **Any extra spaces or characters will cause the button to fail.** The Toolbar section in Notepad will look like the screenshot below.
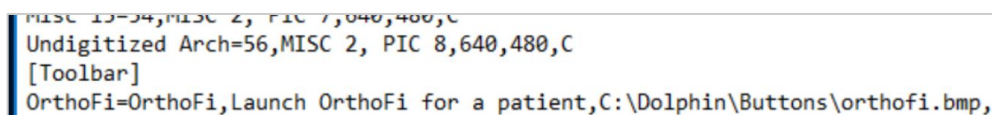
Step 3B: Add the OrthoFi Logo

1. Download orthofi.bmp from Dropbox.
2. **Place the file in:** C:\Dolphin\Buttons
3. If the Buttons folder does not exist, create it.
4. Dolphin Support can assist if needed.
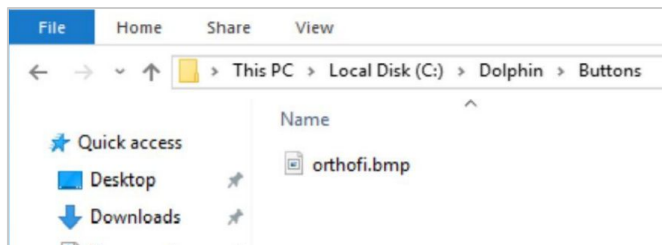
Final Steps

1. Restart Dolphin Management.
2. An Integrations group will appear in the left toolbar.
3. Right-click and add the OrthoFi icon to a Favorites group for quick access.

You're all set!

For help with the Ledger Link button, contact Dolphin Support.