



Cloud 9 Patient Import - Troubleshooting Guide

Cloud 9 Connect will not allow you to import the patient unless all of the fields pictured below are completed in Cloud 9. This guide will help you troubleshoot why you're not able to locate or import a patient when clicking [+ Add Cloud9 Patient](#)

No Search Results

We recommend searching with Patient ID for the fastest and most accurate results. The search feature uses Cloud 9 to search for the patient, so Patient ID will give you the quickest response since it's a unique identifier for the patient.

If there are no search results using Patient ID, please proceed to the next page.

No suggested matches.

Please use the search area above to find patients.



If you locate the patient, but nothing populates under the Patient Info tab, please proceed to the next page.



Review & Confirm Info:

Please review and confirm if the insurance and information provided is still correct. If anything has changed or is missing, please update.

1
Patient Info
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Step 1: Check the Responsible Party's 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 + Q <--- Click here to link families

First Name Samantha

Middle Name

Last Name Johnson

Gender <--- Gender Female Suffix

Greeting

Birthdate <--- Birthdate 07/04/1985 **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 + Add

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

Patient

Title + 🔍

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 for further support.