



# **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 <u>Patient ID</u> 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 an unique identifier for the patient.

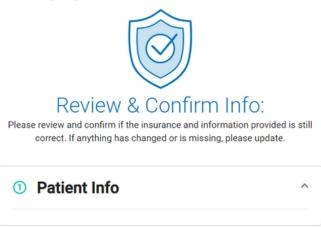
If there are no search results using Patient ID, please proceed to the next page.

#### No suggested matches.

Please use the search area above to find patients.



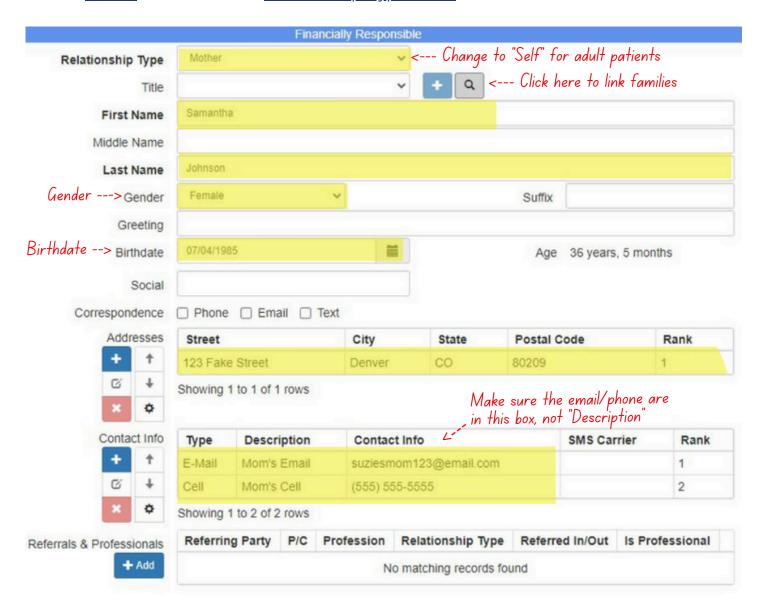
If you locate the patient, but nothing populates under the <u>Patient Info</u> tab, please proceed to the next page.





### **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



The Responsible Party's **email** and **phone number** are both <u>required</u> to import the patient from Cloud 9.

If the Responsible Party does <u>not</u> have an email address, please enter:

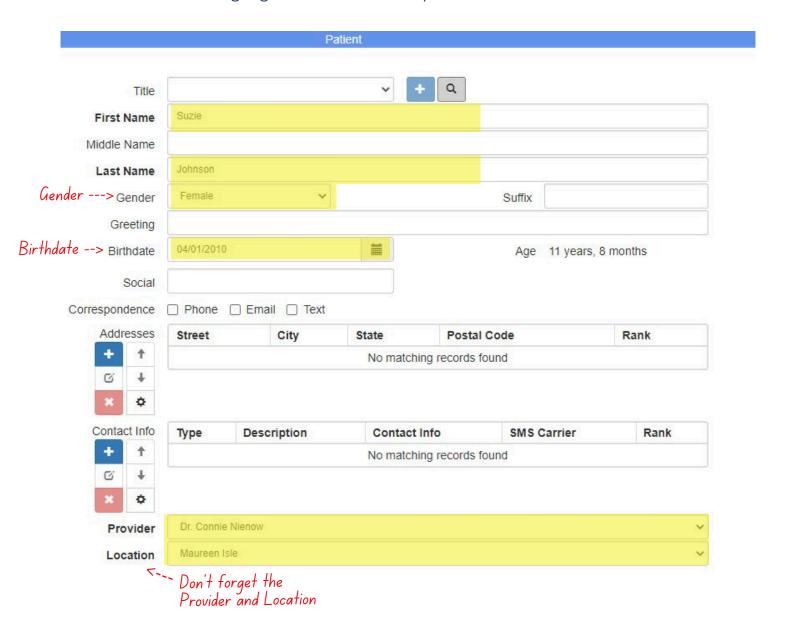
FirstName.LastName[Last 4 Digits of Phone]@orthofi.com | Example: John Doe = john.doe5555@orthofi.com

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



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.