How to Set Up Automated Pending Patient Follow-Ups

Manual Setup for practices not yet using Automatic Pending Patient Follow-Up enrollment

Automated Follow-Up Overview

The Automated Pending Patient Follow-Up program helps re-engage prior non-start prospective patients, increasing pending conversions while complementing your team's personal touches.

Looking for Automatic Enrollment?

OrthoFi's new automated follow-up experience **eliminates manual setup**. Eligible patients are automatically enrolled when treatment is recommended and the Payment Slider is sent. View the job aid for automatic enrollment here.

Interested? Contact your OSM to activate automatic follow-ups for your practice.

How It Works / Enrollment

Once treatment is recommended and a slider is emailed to a patient, email and text reminders are sent automatically to the patient. This helps keep patients engaged and avoids lost starts.

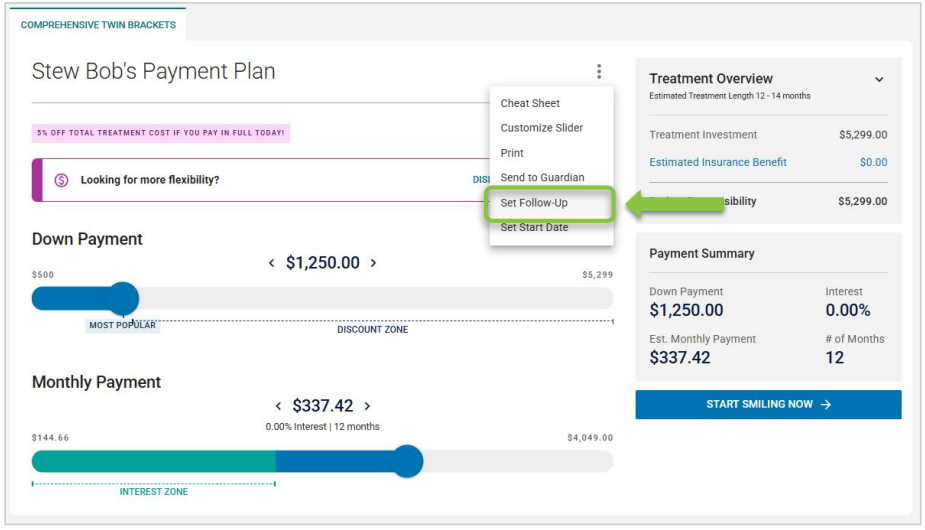
Details:

- **Duration**: 11 weeks (76 days)
- **Start Date**: Starts day after the exam with the first text message sent 24 hours later. If needed, you may change the date to delay the start of the Follow-Up Schedule.
- **Recipient**: The primary contact for patients with a status of "Treatment Recommended"
- **Touchpoints**:
  - 3 automated personalized text messages
  - 5 automated personalized emails
  - 2 TC call reminders in the 'Follow-Up' filter on the OrthoFi dashboard

How to Set Up Automated Follow-Ups

Option A: From the Slider

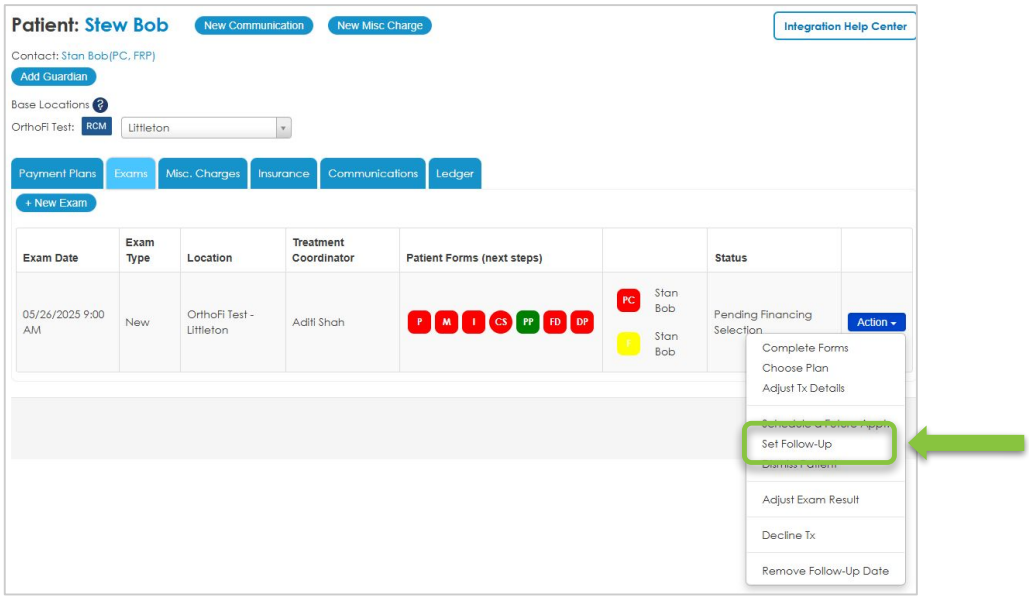
1. Click the **3-dot button (⋮)** in the upper right-hand corner.
2. Select **Set Follow-Up**.
3. Select **Send to Email** and enter an optional message
4. Click **Send & Set Follow-Up**



How to Set Up Automated Follow-Ups (Cont.)

Option B: From the Patient Details Page

1. Click the **3-dot button (⋮)** in the upper right-hand corner
2. Select **Send to Email**, enter an optional message and send the initial email with the Payment Slider link
3. Click **Send & Set Follow-Up**



Cancelling or Completing Auto Follow-Up Messages

How to Manually Stop Follow-Ups:

- From the Payment Slider > Click the three dots > Select Stop Auto Follow-Ups
- From the Patient Detail Page > Exams tab, then click Action > Stop Auto Follow-Ups.
- From the Follow-Up Filter on your dashboard, click Action > Stop Auto Follow-Ups.

Automated Follow-Ups Stop When:

- The patient replies "stop" to a text message or clicks "unsubscribe" in an email.
- The patient's Exam Result is changed to "Do Not Pursue" or "Declined Tx."
- A guardian opts out. The patient will then be placed in the Needs Attention filter.
- The contract is signed and a Start Date is set.

Follow-Up Content

Each message includes a link to the patient's slider to drive Sign@Home starts, and all follow-up activity is logged automatically in the Patient Detail Page Communication tab.

Content Types:

- **Emails**: Send from noreply@orthofi.com and displays your practice name as the sender
- **Texts**: Sends from your practice phone number
- **Call Reminders:** The Treatment Coordinator (TC) will receive 2 call reminders on Day 3 and Day 31 of the campaign. These reminders will appear in the Follow-Up filter on your dashboard.
- **Sender Information**: Emails will come from noreply@orthofi.com, but will display your practice name as the sender. Each practice location has its own phone number for text messages

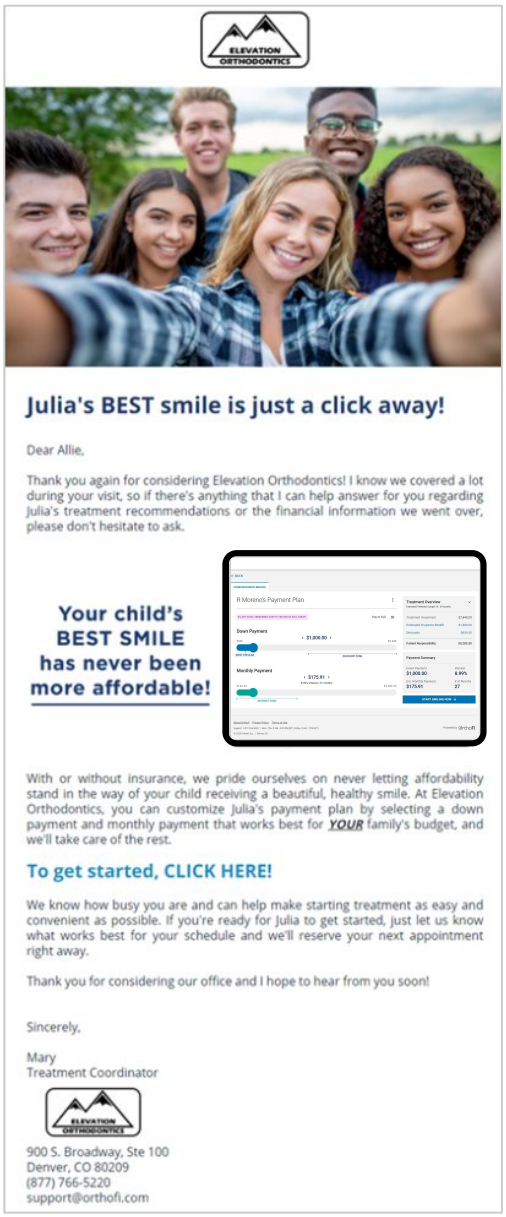
Follow-Up Content Schedule

The 11-week schedule includes a mix of personalized email, text messages, and scheduled call reminders

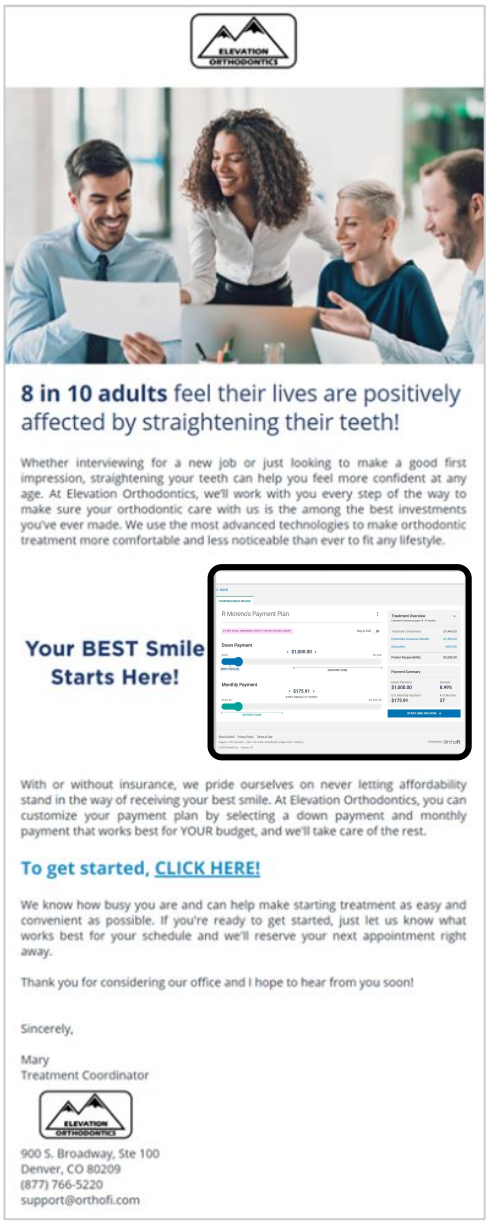
Follow-Up Content Schedule

- Day 01: Text Message
- Day 03: Call Reminder
- Day 06: Email
- Day 14: Text Message
- Day 21: Email
- Day 31: Call Reminder
- Day 36: Email
- Day 50: Text Message
- Day 56: Email
- Day 76: Email

Email Example



Email Example



Text Example

