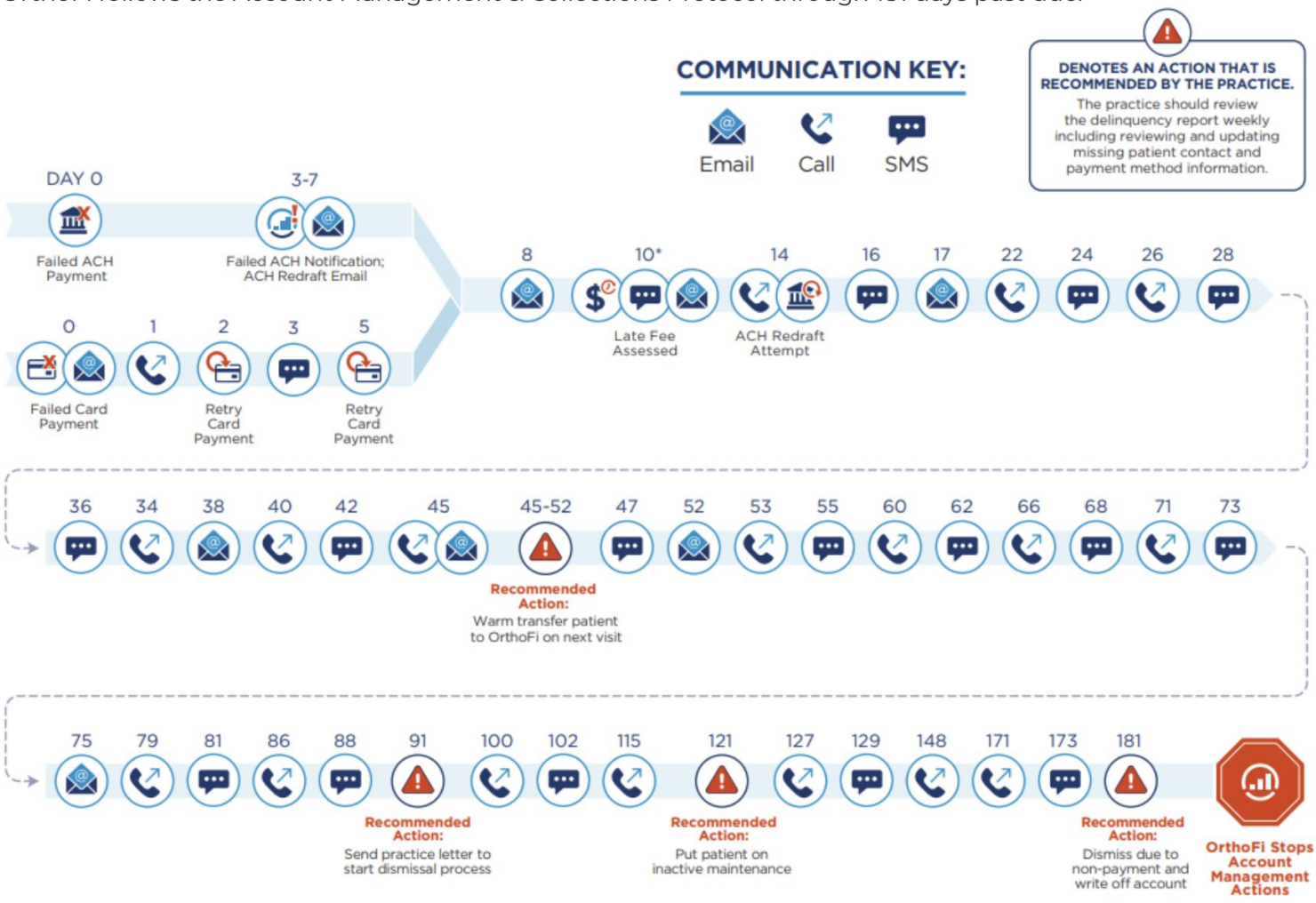
OrthoFi

Managing Write-Off & Dismissal Codes

Production Adjustments and how these adjustments are performed in the OrthoFi system.

Account Management & Collections Protocol

OrthoFi follows the Account Management & Collections Protocol through 181 days past due.



Recommended Actions for Patient A/R Follow-Up

Timing	Recommended Action

Day 45-52
Day 91-98
Day 121–131
	• Review the Delinquency Report for accounts 45-52 / 91-98 / 121-131 days past due
	  ○ **91-98 days past due:** Begin your practice's dismissal process and note in OrthoFi
	  ○ **121–131 days past due:** Set status to **Inactive Maintenance**
	• Add note "Check OrthoFi ledger on appointment" note in PMSW for these accounts
	• At the next appointment, review the ledger, remove the note if paid, or collect the past-due balance via OrthoFi or PMSW as trained.
	• For refinancing, use the Self Service portal or refer to OrthoFi at 877-766-5220

Day 180	• Review the Delinquency Report for accounts 180+ days past due. • **If the dismissal process has been completed:** Dismiss patient in OrthoFi in Self Service Portal, which closing the patient's ledger and disables the payment portal. Document the production adjustment in your PMSW in case of future payment. • **If the patient returns:** Call OrthoFi to reinstate the account, and collect payment to bring the account current.

Write-Off & Dismissal Codes: Definitions & Use-Cases

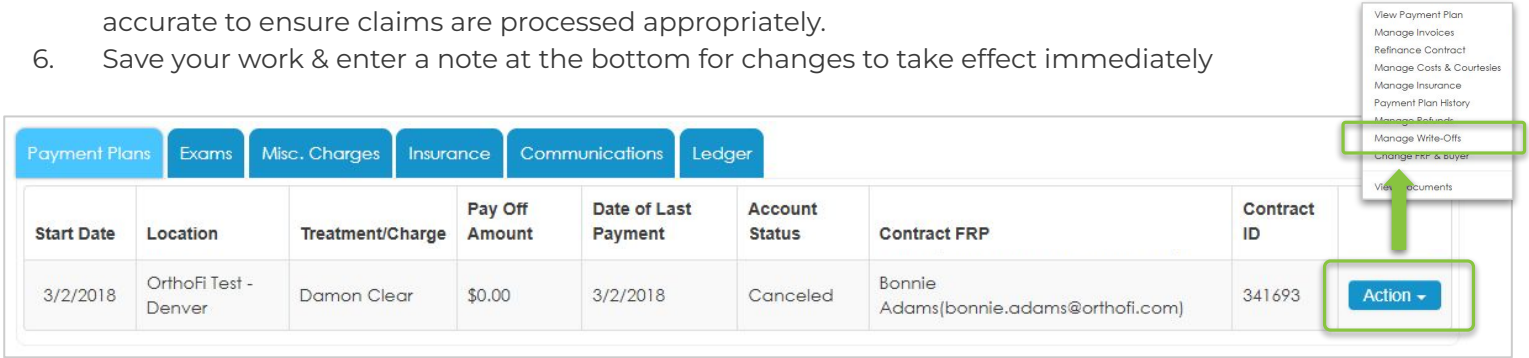
Write-off and dismissal codes are utilized in the event the patient's contract needs to be fully written off/dismissed.

Code	Definition	Use Case
Signed Not Started (Cancelled)	Patients who are written off prior to starting treatment due to cancellation but after the contract was signed.	Write-off of the patient contract due to signing the contract but canceling the service after the contract was signed and an appointment was scheduled but before the first visit is kept. **Note:** Unverified claims with an Appliance Placement Date (APD) more than 18 months old will be written off using the **Signed not started (cancelled)** write-off code.
Signed Not Started (Never Scheduled)	Patients who are written off prior to starting treatment due to never scheduling but after the contract was signed.	Write-off of the patient contract due to signing the contract but the patient asks to cancel before their first visit is scheduled. **Note:** Unverified claims with no Appliance Placement Date (APD) and 18+ months old will be written off using the **Signed not started (never scheduled)** write-off code.
Bad Debt (Suspended Treatment)	Refers to bad debt for patients who have not completed treatment.	Write-off of the patient contract due to inability to make payments on the account while the patient has not completed treatment.
Bad Debt (Tx Complete)	Refers to bad debt for patients who have completed treatment.	Write-off of the patient contract due to the inability to make payments on the account after the treatment has been completed for the patient.
Transfer Out	The patient is transferred out from the practice (moving or switching providers).	Write-off of the patient contract due to the patient moving or patient compliance issues.

Write-Off & Dismissal Codes: Required Actions

Option A: Start at the Patient Detail Page for the patient you wish to adjust.

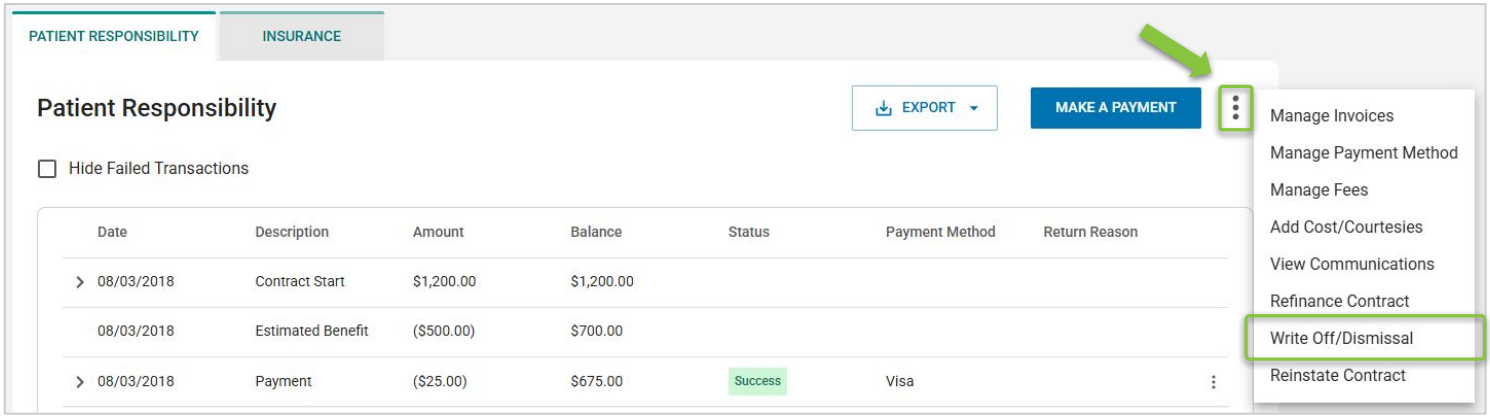
1. Payment Plans Tab → Action Button → Select **Manage Write-Offs** (opens Contract Management page)
2. Select **Manage Write-Offs**
3. After selecting the action you want to take, press **Edit** to begin the process
4. Based on the patient's treatment status and APD, choose 1 of the following write-off reasons:
    a. Signed Not Started (Cancelled)
    b. Signed not Started (Never Scheduled)
    c. Bad Debt (Suspended Treatment)
    d. Bad Debt (Tx Complete)
5. Enter **Final Date of Service**, **Current Production**, and **New Production**
   Important: The Final Date of Service (last date patient was seen at the practice), must be accurate to ensure claims are processed appropriately.
6. Save your work & enter a note at the bottom for changes to take effect immediately



Write-Off & Dismissal Codes: Required Actions (Cont.)

Option B: Start at the Patient Ledger for the patient you wish to adjust.

1. Ledger Tab → 3-dot menu → Select **Write Off/Dismissal**
2. This will take you to the Contract Management section.
3. Select **Manage Write-Offs.**
4. After selecting the action you want to take, press **Edit** to begin the process.
5. Based on the patient's treatment status and APD, choose 1 of the following write-off reasons:
    a. Signed Not Started (Cancelled)
    b. Signed Not Started (Never Scheduled)
    c. Bad Debt (Suspended Treatment)
    d. Bad Debt (Tx Complete)
6. Enter **Final Date of Service**, **Current Production**, and **New Production.**
   Important: The Final Date of Service (last date patient was seen at the practice), must be accurate to ensure claims are processed appropriately.
7. Save your work and enter a note at the bottom for changes to take effect immediately.



How to Reinstate a Contract

Reinstate a contract when a patient returns to treatment and wants to resume their payment plan.

Note: Reinstated contracts must also be refinanced. See the Refinancing Job Aid for guidance.

1. Ledger Tab → 3-dot menu → Select **Reinstate Contract**
2. This will take you to the Contract Management section
3. Select **Reinstate Contract**
4. After selecting the action you want to take, press **Edit** to begin the process
5. Enter whom this was Requested By
6. Enter the Reason for the Adjustment
7. Save your work