

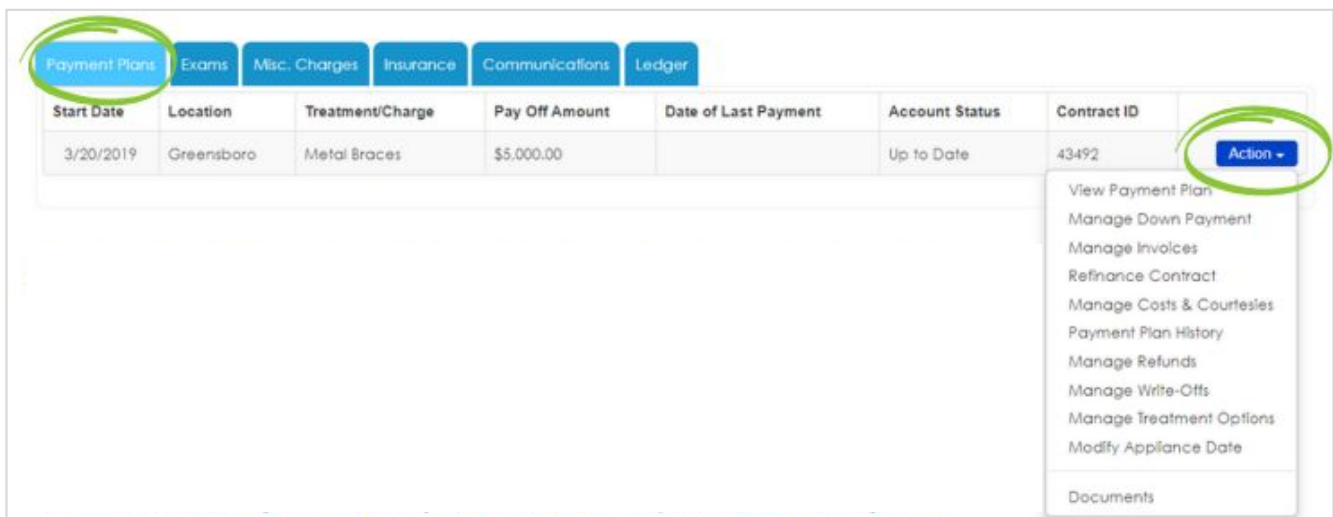
## How to Manage Patient Contracts and Adjustments

The Patient Contract Management tool gives you the ability to make adjustments to active patient contracts without needing to contact OrthoFi Support.

Access to these abilities are restricted based on the user's rights set up via the Team Management button.

### How to Adjust a Patient Contract

1. Start at the Patient Detail Page for the patient you wish to adjust
2. From there, click Payment Plans Tab -> Action Button -> select an option



The screenshot shows the Patient Detail Page interface. At the top, there are several tabs: 'Payment Plans' (highlighted with a green circle), 'Exams', 'Misc. Charges', 'Insurance', 'Communications', and 'Ledger'. Below the tabs is a table with columns: 'Start Date', 'Location', 'Treatment/Charge', 'Pay Off Amount', 'Date of Last Payment', 'Account Status', and 'Contract ID'. The first row of data shows '3/20/2019', 'Greensboro', 'Metal Braces', '\$5,000.00', an empty date field, 'Up to Date', and '43492'. To the right of the table, there is an 'Action' button (highlighted with a green circle) which has a dropdown menu open. The dropdown menu contains the following options: 'View Payment Plan', 'Manage Down Payment', 'Manage Invoices', 'Refinance Contract', 'Manage Costs & Courtesies', 'Payment Plan History', 'Manage Refunds', 'Manage Write-Offs', 'Manage Treatment Options', 'Modify Appliance Date', and 'Documents'.

3. This will take you to the Contract Management page
4. Select an action under the blue Contract Management box on the left (details on each action below)
5. After selecting the action you want to take, press Edit to begin the process
6. Save your work & enter a note at the bottom for changes to take effect immediately

## How to Adjust a Patient Contract (Cont.)

All activities will automatically log in the patient's Communications tab. You now will have the option to mark the contract for re-sign by clicking the Action Button

**Contract Management**

Return to Patient Detail

### Manage Contract Invoices - Patient Name

**Current Contract Details:**

Total Patient Responsibility:	\$5,000.00
Patient Paid as of Today:	\$1,552.00
Past Due Balance:	\$0.00
Remaining Balance as of Today:	\$3,448.00
Remaining Payments:	18 of 26
Interest Rate:	9.90%

**Insurance:**  
None Applicable

### Adjustment Summary as of 4/26/2021

Print Edit

Due Date	Payment Type	Status	Amount	Amount Paid	Remaining Balance
8/31/2020	Down Payment	Paid	\$200.00	\$200.00	\$0.00

## Contract Management Glossary

### Payment Plan History

- Overview of current patient contract details and insurance benefit details.
- No changes can be made from this page.

### Invoice Management

- Allows the user to make changes to invoicing schedules such as adjusting future payment dates, payment amounts, suspend invoicing schedules, etc.
- If the 'Suspend Contract' option is used, the contract will be suspended indefinitely until it is manually reactivated by the user. If the suspended contract is interest-bearing, interest will continue to accrue on a daily basis. If a suspended contract has past due invoicing, the patient will reflect on the Delinquent Report.
- If the 'Move Schedule' option is used, this will bring any past due invoices current. Past due invoicing cannot be adjusted or reset without being brought current first.
- The 'Move Schedule' option can also be used to apply bulk payments to the next invoices rather than the principal balance.
- If the 'Edit Monthly Due Date' option is used, the user can select a new monthly invoice due date between 1 and 28.

### Refinance Contract

- Allows the user to make changes to a contract such as removing interest, changing the number of invoices, and changing the invoice payment amount.
- Only contracts that initially were interest-bearing can have interest adjusted. Remember to click in the white space for the system to calculate updates.

### Costs & Courtesies

- Allows the user to apply an additional cost or courtesy/discount to an active contract. If the Refund option is active, the user will be able to refund certain items, when applicable.
- After clicking the 'Edit' button, the user must select the 'Add' button to make changes.

### Manage Fees

- Allows the user to reverse fees automatically applied to an active contract (i.e. late fees).

### Manage Refunds

- Allows the user to refund a specific payment on an active contract, or reflect a practice issued refund, etc.
- The user will not be allowed to process a partial refund to any payment method on file in OrthoFi.
- OrthoFi cannot refund a payment method for transactions older than six months.
- OrthoFi cannot refund any ACH transactions for a minimum of seven business days.
- The user will not see these options until time is lapsed.

### Manage Write Offs

- Allows the user to write off an active contract balance.
- If the Refund option is active, the user will be able to refund certain payments, when applicable.

### Reinstate Contract

- Allows the user to activate a previously written off contract/payment plan.
- When the user reinstates a contract, they also must refinance the contract.

### Manage Treatment Options

- Allows the user to change a treatment option (metal braces, Invisalign, etc.) on an active contract.
- If the Refund option is active, the user will be able to refund a certain payment, when applicable.
- The user will have the ability to select all treatment options previously presented on the slider. The user will also be able to build a custom plan using this option, but it must reflect the total treatment fee (including what may have previously been paid).
- OrthoFi will automatically adjust and process any claim submission needs.

### Manage Down Payments

- Allows the user to change a down payment amount after the contract has been signed.
- If the down payment has already been paid in full, the user cannot make edits.