

How to Schedule Automated Pending Patient Follow-Ups

Job Aid

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.

Automated Follow-Up Overview

How it Works: 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.

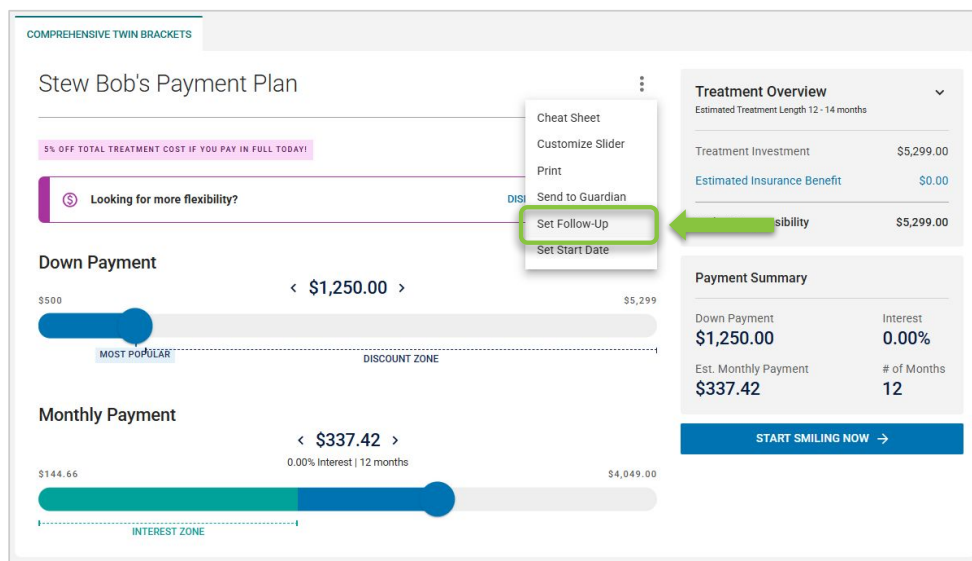
Details:

- **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
- **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.

How to Set Up Automated Follow-Ups

Option A: From the Slider

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



The screenshot shows the OrthoFi dashboard for 'Stew Bob's Payment Plan'. The main area displays a slider for 'Down Payment' (ranging from \$500 to \$5,299) and 'Monthly Payment' (ranging from \$144.66 to \$4,049.00). A dropdown menu is open in the upper right-hand corner, showing options: 'Cheat Sheet', 'Customize Slider', 'Print', 'Send to Guardian', 'Set Follow-Up' (highlighted with a green box), and 'Set Start Date'. A green arrow points from the 'Set Follow-Up' option to the 'Treatment Overview' section on the right. The 'Treatment Overview' section shows 'Estimated Treatment Length 12 - 14 months', 'Treatment Investment \$5,299.00', 'Estimated Insurance Benefit \$0.00', and 'Estimated Insurance Co. Contribution \$5,299.00'. The 'Payment Summary' section shows 'Down Payment \$1,250.00', 'Interest 0.00%', 'Est. Monthly Payment \$337.42', and '# of Months 12'. A blue button at the bottom right says 'START SMILING NOW →'.

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**

The screenshot shows the 'Patient: Stew Bob' details page. At the top, there are buttons for 'New Communication' and 'New Misc Charge', and a link to the 'Integration Help Center'. Below this, the patient's contact information is listed: 'Contact: Stan Bob (PC, FRP)' and 'Add Guardian'. The 'Base Locations' section shows 'OrthoFI Test: RCM' and 'Littleton'. A row of tabs includes 'Payment Plans', 'Exams', 'Misc. Charges', 'Insurance', 'Communications', and 'Ledger'. The 'Exams' tab is active, showing a table with columns: 'Exam Date', 'Exam Type', 'Location', 'Treatment Coordinator', 'Patient Forms (next steps)', 'Status', and 'Action'. The first row shows an exam on '05/26/2025 9:00 AM' at 'OrthoFI Test - Littleton' by 'Aditi Shah'. The 'Patient Forms' column shows a sequence of steps: P, M, I, CS, PP, FD, DP. The 'Status' column shows 'Pending Financing Selection'. The 'Action' dropdown menu is open, with 'Set Follow-Up' highlighted by a green box and a green arrow pointing to it. Other options in the menu include 'Complete Forms', 'Choose Plan', 'Adjust Tx Details', 'Schedule or Refine Apppt', 'Cancel Appointment', 'Adjust Exam Result', 'Decline Tx', and 'Remove Follow-Up Date'.

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



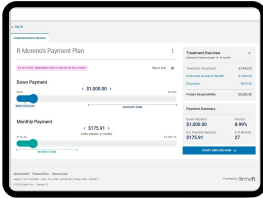


Julia's BEST smile is just a click away!

Dear Allie,

Thank you again for considering Elevation Orthodontics! I know we covered a lot during your visit, so if there's anything that I can help answer for you regarding Julia's treatment recommendations or the financial information we went over, please don't hesitate to ask.

Your child's BEST SMILE has never been more affordable!



With or without insurance, we pride ourselves on never letting affordability stand in the way of your child receiving a beautiful, healthy smile. At Elevation Orthodontics, you can customize Julia's payment plan by selecting a down payment and monthly payment that works best for **YOUR** family's budget, and we'll take care of the rest.

To get started, [CLICK HERE!](#)

We know how busy you are and can help make starting treatment as easy and convenient as possible. If you're ready for Julia to get started, just let us know what works best for your schedule and we'll reserve your next appointment right away.

Thank you for considering our office and I hope to hear from you soon!

Sincerely,
Mary
Treatment Coordinator



900 S. Broadway, Ste 100
Denver, CO 80209
(877) 766-5220
support@orthofi.com

Email Example

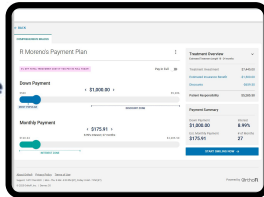




8 in 10 adults feel their lives are positively affected by straightening their teeth!

Whether interviewing for a new job or just looking to make a good first impression, straightening your teeth can help you feel more confident at any age. At Elevation Orthodontics, we'll work with you every step of the way to make sure your orthodontic care with us is the among the best investments you've ever made. We use the most advanced technologies to make orthodontic treatment more comfortable and less noticeable than ever to fit any lifestyle.

Your BEST Smile Starts Here!



With or without insurance, we pride ourselves on never letting affordability stand in the way of receiving your best smile. At Elevation Orthodontics, you can customize your payment plan by selecting a down payment and monthly payment that works best for **YOUR** budget, and we'll take care of the rest.

To get started, [CLICK HERE!](#)

We know how busy you are and can help make starting treatment as easy and convenient as possible. If you're ready to get started, just let us know what works best for your schedule and we'll reserve your next appointment right away.

Thank you for considering our office and I hope to hear from you soon!

Sincerely,
Mary
Treatment Coordinator



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Text Example

11:21

<  +1 (720) 513-3266

Hi David! At Elevation Orthodontics, we use the most advanced technologies to make treatment more comfortable and less noticeable than ever to fit any lifestyle. You can customize your payment plan and get started today by [clicking here!](#)

