

Ortho2 Edge Connect

Job Aid

Table of Contents (Click to Jump to Section)

1. [Key Rules of the Integration](#)
2. [What Automatically Transfers from Edge → OrthoFi](#)
3. [Managing Families & Responsible Parties in Edge](#)
4. [Scheduling & Adjusting Exams in Edge](#)
5. [Financial & Delinquency Features](#)

Edge Connect automatically migrates patient and exam data from Ortho2 Edge into OrthoFi and manages your OrthoFi schedule automatically.

Key Rules

Key Integration Rules & Considerations:

1. **Ortho2 Edge Updates/Replaces Information in OrthoFi.**
 - All patient, guardian, and schedule information must be managed in Ortho2 Edge only.
 - OrthoFi automatically updates to match Edge.
2. **Do Not Use OrthoFi for Scheduling**
 - Do NOT schedule, reschedule, cancel, or adjust exam times in OrthoFi.
 - Only schedule and manage appointments in Ortho2 Edge.
3. **Insurance Does Not Transfer**
 - Insurance data never migrates from Edge to OrthoFi.
 - Add insurance directly into OrthoFi.
4. **Edge Recalls and OrthoFi Follow-Ups Do Not Sync Between Platforms**
 - Edge Recalls do not sync to OrthoFi.
 - OrthoFi Follow-Ups do not sync back to Edge.
5. **Edge updates may take up to 5 minutes to reflect in OrthoFi.**
 - Visit the Integration Help Center if a patient or exam has not imported

What Automatically Transfers from Edge → OrthoFi

Fields Highlighted in Red Automatically Transfer from Edge -> OrthoFi

The screenshot shows the OrthoFi 'Create New Patient' interface. Several fields are highlighted with red boxes to indicate they transfer automatically from Edge:

- Clinical:** "Office" (PWC), "Doctor" (CS), "Treatment" (Pre-Treat), "Status" (NEW), "Assistant" (Set as Default).
- Biographical:** "First Name" (Jennifer), "Last Name" (Johnson).
- Address:** "Address" (123 Fake Street NW), "City" (Smalltown), "State" (CO), "Zip" (123456).
- Family:** A red box surrounds the "Family" section with the text "Click here to add a Family ->".
- Biographical:** "First Name" (Sarah), "Last Name" (Johnson), "DOB" (4/1/1982).
- Contact Info:** A red box surrounds the "Contact Info" section, which includes "Cell Mom" and "Email Mom" fields.
- Miscellaneous:** A red box surrounds the "Miscellaneous" section, which includes "Cell Mom" and "Email Mom" fields.

At the bottom, there are buttons for "Action: Open Folder", "Save", and "Cancel".

Required Fields:

Patient Information

- First / Last Name
- Address
- Gender
- Date of Birth

Billing Party (Family)

- First / Last Name
- Address
- Gender
- Date of Birth

Patients sharing one Responsible Party must be linked to the same Responsible Party in Edge using the Family feature.

Appointment Information

- Doctor
- Treatment Coordinator/TC (appears as 'Assistant' in Edge)
- Exam Date / Time
- Exam Type

Other Information:

Follow-Ups

- Edge automatically sets Follow-Ups in OrthoFi whenever any of the following actions occur in Edge on the **same day**: Exam Cancelled, Exam Deleted, Exam Missed
- **Observation Result:** Today's exam result in OrthoFi will change to "Observation"—no further action needed.

Important: Ortho2 Edge will automatically create Responsible Parties in OrthoFi. OrthoFi will automatically update records anytime a Responsible Party record is changed in Ortho2 Edge.

How to Add / Adjust Responsible Party

- Start on the **Patient Profile** → Click **Family** → Edit → Select **Add RP OR Remove RP**
- OrthoFi will import the top Responsible Party as the FRP in OrthoFi.
- Adjust the Responsible Party in Edge to make the desired Responsible Party at the top to become the Financially Responsible Party in OrthoFi.

Linking Siblings / Creating a Family in Edge

- Patients sharing the same Responsible Party must be linked via Edge's **Family feature**.
- Access the Family panel within the patient folder to link responsible parties to multiple patients.

Scheduling & Adjusting Exams in Edge

Important: Schedule exams in Edge only. Do not schedule or adjust exams in OrthoFi.

Key Information

- Ortho2 Edge automatically creates and schedule patients when using pre-selected appointment types.
- **Patients & Exams cannot be deleted from OrthoFi.**
 - Deleting an exam in Edge will result in a cancellation in OrthoFi, and OrthoFi will keep the exam as a historical record.

How to Schedule an Exam

- Via the **Smart Scheduler** or **Scheduler Button** on the Edge homepage **OR**
- Schedule an appointment as a **Recall**
 - **Recall Appointments:** An appointment for patients who don't have a specific appointment scheduled, such as annual retainer checks or pre-treatment exams, to prevent them from falling through the cracks.
 - Edge "Recalls" and OrthoFi Follow-Ups do not sync between platforms.

How to Adjust Exams in Ortho2 Edge

Use one of the following options:

- **Scheduler Bar / Clipboard** → Rescheduled, Missed, Changed
- **Patient Chart** → Missed, Deleted, Cancelled, Changed
- **Click & Drag Schedule** → Rescheduled, Changed
- **Right Click → Process Appointment** → Missed, Deleted, Cancelled, Changed
- Edge will automatically create **Follow-Ups** in OrthoFi whenever any of the following actions occur in Edge on the same day: **Exam Cancelled, Exam Deleted, Exam Missed**

Financial & Delinquency Features

OrthoFi Connect Financial Alerts

- Financial alerts are automatically added to Ortho2 Edge patient records when a patient becomes past due on their OrthoFi payment plan. These alerts update automatically once the patient makes a payment and their contract becomes current.
- **Important:** OrthoFi sends each alert only once per delinquency cycle. If an alert is deleted before the contract is current, the system will not resend it until the account becomes up to date and goes past due again.

OrthoFi Connect Financial Alerts

