

How to Add Insurance in OrthoFi for PMSW Integrations

Job Aid

Important: Insurance information **does not sync** between your practice management software and OrthoFi. Because OrthoFi manages your insurance, all insurance details must be entered **directly into OrthoFi** only.

1. Navigate to **Patients** → Search for the patient in the search bar → Select the patient

The screenshot shows the OrthoFi interface. At the top, the 'Patients' tab is highlighted with a green circle. Below the search bar, there are input fields for Patient Name, Email, Elevation Ortho..., and Lone Tree. A green circle highlights the 'Search' button at the bottom left of the patient info section.

2. Click the **Insurance Tab** → **Summary** → **+Add New Insurance**

The screenshot shows the OrthoFi Insurance Summary page. The 'Insurance' tab is highlighted with a green circle. Below the eligibility table, the 'summary' button is circled in green. At the bottom, the '+ Add New Insurance' button is circled in green.

3. As OrthoFi manages insurance directly, no updates will sync automatically in your PMSW.

Note: Updates in your PMSW may take up to **5 minutes** to appear in OrthoFi. If a patient or exam has not imported, please visit the Integration Help Center for assistance.