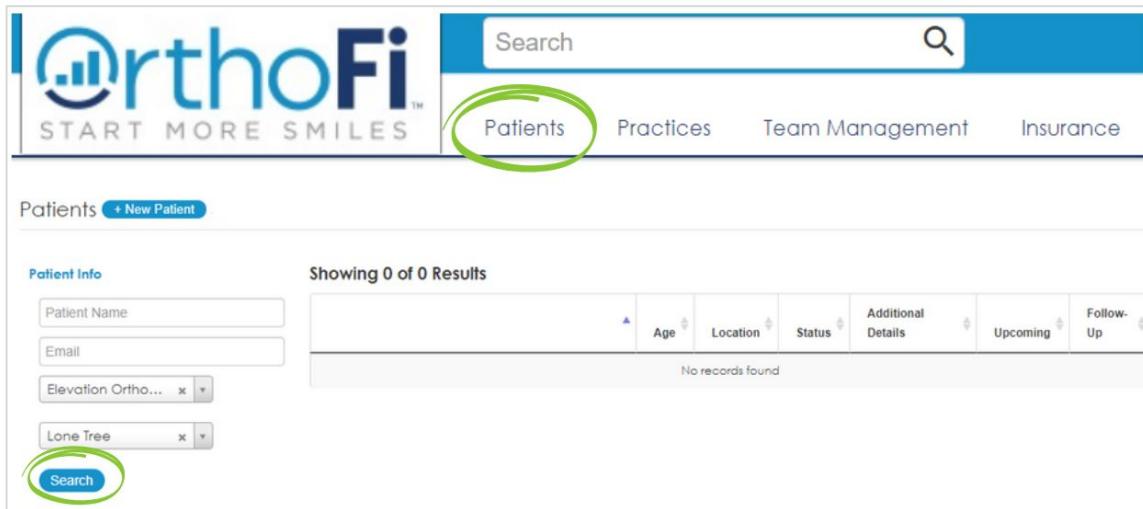![OrthoFi - Start More Smiles logo]

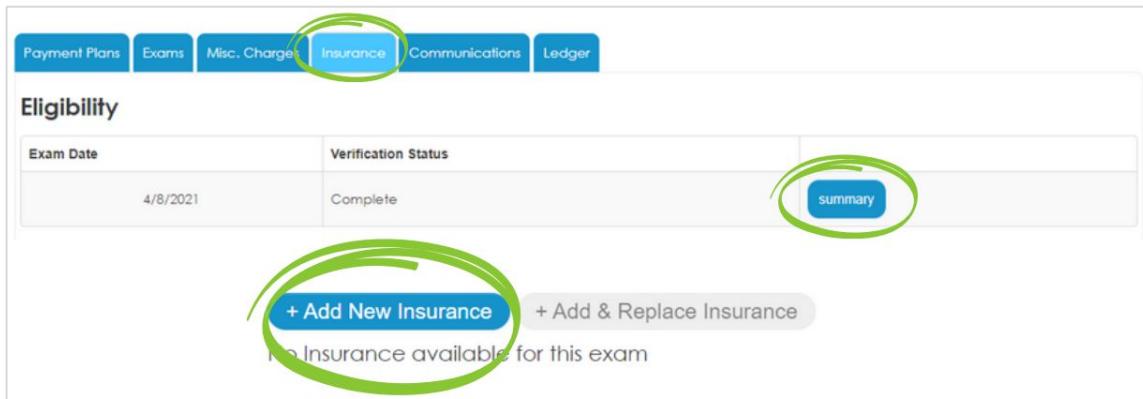# How to Add Insurance in OrthoFi
for PMSW Integrations
Job Aid

> **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

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

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.