

## Cloud 9 Connect

Job Aid

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Cloud 9 Connect allows you to import patient and exam information from Cloud 9 into OrthoFi and gives you visibility of your past due OrthoFi accounts in Cloud 9.

## Scheduling Requirements

To ensure patients and exams import correctly into OrthoFi, the following is required in Cloud 9:

- The **Financially Responsible** section in Cloud 9 will import as the **Primary Contact** in OrthoFi.
- Information in this section should correspond to the person you want to **receive OrthoFi's patient forms**.

The screenshot shows the 'Patient' form in OrthoFi. Required fields are highlighted in yellow:

- Title (dropdown)
- First Name (text)
- Last Name (text)
- Gender (dropdown)
- Birthdate (date)
- Age (text)
- Relationship Type (dropdown)
- Primary Contact Name (text)
- Primary Contact Gender (dropdown)
- Primary Contact DOB (date)
- Primary Contact Phone (text)
- Primary Contact Email (text)

### Required Fields (Yellow):

#### Patient Information

- Patient Name
- Patient Gender
- Patient DOB
- Provider
- Location

#### Financially Responsible Party:

- Relationship Type
- Primary Contact Name
- Primary Contact Gender
- Primary Contact DOB
- Primary Contact Phone
- Primary Contact Email\*

\*If the Primary Contact does not have an email, enter:  
FirstName.LastName[Last 4 Digits of Phone]@orthofi.com

**Example:** John Doe =  
john.doe5555@orthofi.com

## Responsible Party Contact Info and Linking

- Patients cannot be imported unless their Responsible Party has both **Email** and **Phone Number** added in Cloud 9.
- When adding siblings, ensure they are linked to the **same Financially Responsible Party** Record in Cloud 9.
- If the patient is their own Responsible Party, mark **Relationship Type = Self** in Cloud 9.

### How to Link Families

- Open the Financially Responsible Party record
- Next to the Title field, click the magnifying glass
- Search and select the patient to link to the Financially Responsible Party

Financially Responsible

Relationship Type: Mother

Title: [magnifying glass icon] <--- Click here to link families

First Name: Samantha

Middle Name: [empty]

Last Name: Johnson

Gender: Female

Suffix: [empty]

Greeting: [empty]

Birthdate: 07/04/1985

Age: 36 years, 5 months

Social: [empty]

Correspondence: ☐ Phone ☐ Email ☐ Text

Addresses:

Street	City	State	Postal Code	Rank
123 Fake Street	Denver	CO	80209	1

Showing 1 to 1 of 1 rows

Contact Info:

Type	Description	Contact Info	SMS Carrier	Rank
E-Mail	Mom's Email	suziesmom123@email.com		1
Cell	Mom's Cell	(555) 555-5555		2

Showing 1 to 2 of 2 rows

Referrals & Professionals:

Referring Party	P/C	Profession	Relationship Type	Referred In/Out	Is Professional
No matching records found					

## How to Import Patients and Appointments from Cloud 9

**Important:** Create patients and appointments in Cloud 9 only.

### Step by Step Process

1. Add patients and exams from Cloud 9 to OrthoFi via the **+Add Cloud 9 Patient button** on the OrthoFi Patients Page.

**+ Add Cloud9 Patient**

2. Search for the patient using their Cloud 9 Patient ID (preferred) or Last Name.
3. When you locate the patient you wish to import, press the **Select button** and proceed to the next steps to customize patient information.

# How to Import Patients and Appointments from Cloud 9 (Cont.)

## OrthoFi Connect Search



This search module is available to do an immediate pull of data from Cloud9 in order to copy over patient records into the OrthoFi system. You can search for your patient record by searching the Cloud9 patient ID or the patient's last name.

Search Patient ID or Last Name

123456

Select Practice

Storms Orthodontics

SEARCH

Patient Name	Patient Birthdate	Status in Cloud9	Cloud9 Practice Location	Action
Johnson, Suzie	Apr 1, 2010	NP-Ortho	Maureen Isle	<a href="#">SELECT &gt;</a>

4. Verify Patient, Exam, and Staff information and then press the **Verify button** to proceed to the next page. You can edit any of the fields - please correct any errors you see.

Review & Confirm Info:  
*Suzie Johnson*

Please review and confirm if the insurance and information provided is still correct. If anything has changed or is missing, please update.

1 Patient Info

Email Address  
suziesmom123@email.com

Primary Contact Phone Number  
(555) 555-5555

Guardian First Name  
Samantha

Guardian Last Name  
Johnson

Patient First Name  
Suzie

Patient Last Name  
Johnson

☐ Patient is the same as the Guardian.

Patient Birthdate  
4/1/2010

Status in Cloud9  
NP-Ortho

OrthoFi Practice Location  
Denver

[VERIFY](#)

2 Exam Details

Certain Cloud9 information may not match what's in OrthoFi. If so, please review and select the applicable OrthoFi value for each exam field below.

☐ Do not create a patient exam for this patient.

Exam Date  
12/13/2021

Exam Time  
09:00 AM

Exam Location  
OrthoFi Value  
Denver

Cloud9 Value  
Maureen Isle

Exam Type  
OrthoFi Value  
New

Cloud9 Value  
EXAM- NP Exam CHILD

☒ Send welcome email

☒ Send welcome text message

[VERIFY](#)

3 Staff Details

Certain Cloud9 information may not match what's in OrthoFi. If so, please review and select the applicable OrthoFi value for each exam field below.

Treatment Coordinator

OrthoFi Value  
Treatment Coordinator

Cloud9 Value  
n/a

Treating Doctor

OrthoFi Value  
Dr. Doctor Cloud9

Cloud9 Value  
Dr. Connie Nienow

[VERIFY](#)

## How to Import Patients and Appointments from Cloud 9 (Cont.)

- Insurance information will not transfer from Cloud 9, so you will need to add insurance information directly to OrthoFi. Since OrthoFi manages your insurance, you only need to add this information into OrthoFi.

4 Dental Insurance

[Do not add insurance for this patient at this time.](#)

**Subscriber Details**

Who is the subscriber for this policy? \*

Patient Primary Contact New Person

Full Legal First Name \*

Full Legal Last Name \*

Date of Birth \*

Gender (select one): \*

Male Female

Relationship to Patient \*

**Subscriber Address**

Street Address \*

Apt., ste., bldg., etc.

City \*

State \*

ZIP Code \*

**Dental Insurance**

Please enter a valid dental insurance policy for the patient being added.

Dental Insurance Carrier \*

**CREATE RECORD**

**Important: All fields in this sections are required.**

- If the patient does not have insurance, click the “Do not add insurance for this patient” box at the top.
- Choose the **Subscriber** of the Policy.
- If the subscriber is not listed, select New Person:
  - You will need to manually add their information.
  - Example: One parent is the subscriber, and another parent is bringing the patient in for the exam.
- Enter Subscriber Information:
  - First & Last Name
  - Gender
  - Relationship to Patient
  - Address
  - Carrier Name
  - Subscriber ID or SSN#
  - Group Name/Number (recommended)
- Choose the **Insurance Carrier** from the dropdown list.
- Click **Create Record** to save your work.

The patient will be available in OrthoFi in less than 5 minutes. The Primary Contact will receive new patient forms via text and email.

# Delinquency Alerts

OrthoFi Connect provides alerts and comments within Cloud 9 patient records to notify your team when patients are past due on their OrthoFi payment plans. These alerts are updated automatically if a patient makes a payment and becomes current on their contract.

## Features

Alerts appear in the following areas:

- Patient Schedule
- Patient Check Out
- Patient Profile
- Patient Comments

Each alert in Cloud 9 includes a **direct link** to the OrthoFi patient ledger for easy access.

## Requirements

To receive push alerts and comments, the patient must be entered through the **OrthoFi Connect integration tool**.

## Notes:

- Alerts are accessible to all team members.
- Alerts update in real-time as payments are made.

## Schedule View

45	3:45 PM
50	Jones, Quinn
55	EXAM- NP Exam
60	CHILD
65	Ready for Checkout
70	16 years, 1 months
75	[Vendor
80	Comment]: As of
85	[DATE] Patient A/R
90	Past Due Patient
95	Ledger Details:
100	https://portal.orthofi.com

## Patient Comments (Past Due Account)

Quinn Jones (3652558)-			Patient Comments		
Date	Type	Comment	Range	Next Appt	Ledger
07/25/2019	Vendor Comment	As of [DATE] Patient A/R Past Due Patient Ledger Details: <a href="https://portal.orthofi.com/Patient/Detail/[PATIENTID]#tab=nledger">https://portal.orthofi.com/Patient/Detail/[PATIENTID]#tab=nledger</a>			

## Patient Comments (Updated Account)

Quinn Jones (3652558)-			Patient Comments		
Date	Type	Comment	Range	Next Appt	Ledger
07/25/2019	Vendor Comment	As of [DATE] Patient A/R is No Longer Past Due Patient Ledger Details: <a href="https://portal.orthofi.com/Patient/Detail/[PATIENTID]#tab=nledger">https://portal.orthofi.com/Patient/Detail/[PATIENTID]#tab=nledger</a>			

## Patient Alerts

Patient Alerts	
7/25/2019[Vendor Comment] As of [DATE] Patient A/R Past Due Patient Ledger Details: <a href="https://portal.orthofi.com/Patient/Detail/[PATIENTID]#tab=nledger">https://portal.orthofi.com/Patient/Detail/[PATIENTID]#tab=nledger</a>	
<div>✓ OK</div>	

**Note:** Comments & Alerts are updated/added/removed every two hours in Cloud 9.