

# Dolphin Connect

Job Aid

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Dolphin Connect migrates patient and exam information into OrthoFi from Dolphin, saving your staff time from double-entry and scheduling. Dolphin Connect also gives you visibility of your past due OrthoFi accounts in Dolphin.

## Key Rules

### Key Integration Rules & Considerations:

- 1. Dolphin Updates/Replaces Information in OrthoFi.**
  - All patient, guardian, and schedule information must be managed in Dolphin only.
  - OrthoFi automatically updates to match Dolphin.
- 2. Manage Schedules and Appointments in Dolphin Only**
  - Do not schedule, reschedule, cancel, or adjust exam times in OrthoFi.
  - Only schedule and manage appointments in Dolphin.
- 3. Insurance Does Not Transfer from Dolphin to OrthoFi.** Add insurance directly into OrthoFi.
- 4. Dolphin will automatically set Follow-Ups in OrthoFi.**
  - OrthoFi **does not** set Follow-Ups in Dolphin.
  - If an Obs PT is not ready to schedule next appt, enter the exam result in OrthoFi and set a Follow Up Date in OrthoFi.
- 5. Dolphin updates may take up to 5 minutes to reflect in OrthoFi.** Visit the Integration Help Center if a patient or exam has not imported
- 6. Patients & Exams Cannot Be Deleted from OrthoFi.**

# What Automatically Transfers from Dolphin → OrthoFi

## Fields Highlighted in Red Automatically Transfer from Dolphin → OrthoFi

The screenshot shows the 'Add a Patient' dialog box. The 'Patient' section includes fields for Salutation, First/Last name (Chris Farley), Greeting, Street (1000 Main), City (Denver), State (CO), Zip (80210), Birthdate (01/01/2008), Gender (Male), Email (coryf12938@orthofi.com), Phone #s (Mobile: (111) 111-1112), Mail Method (Std Mail), and Referrals (Doctor and Patient dropdowns). The 'Billing Party' section includes fields for Salutation (Mr.), First/Last name (Cory Farley), Greeting, Street (1000 Main), City (Denver), State (CO), Zip (80210), Email (coryf12938@orthofi.com), Phone #s (Mobile: (111) 111-1112), Employer, Orthodontist & Location (Location: OrthoFi, Orthodontist: Doctor, Jon, Assistant: TC, Jon), and New Patient Reminder(s). Fields highlighted with red boxes include First/Last, Greeting, Street, City, State, Zip, Birthdate, Gender, Email, Phone #s, Mail Method, Location, Orthodontist, and Assistant.

## Required Fields:

### Patient Information

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

### Appointment Information

- Doctor
- Treatment Coordinator (TC)
- Exam Date / Time
- Exam Type

### Billing Party (Family)

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

## Other Information:

### Pre-Selected Appointment Types

- Patient Created
- Exam Scheduled
- Exam Rescheduled
- Future Exam Scheduled
- Dolphin updates OrthoFi's exam result to **Observation** when a future exam is scheduled
- Dolphin automatically sets **Follow-Ups** in OrthoFi whenever any of the following actions occur in Dolphin on the same day:
  - Exam Cancelled
  - Exam No-Show

**Important:** Insurance **does not transfer to OrthoFi**. Always add insurance in OrthoFi only.

# Scheduling & Adjusting Exams in Dolphin

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

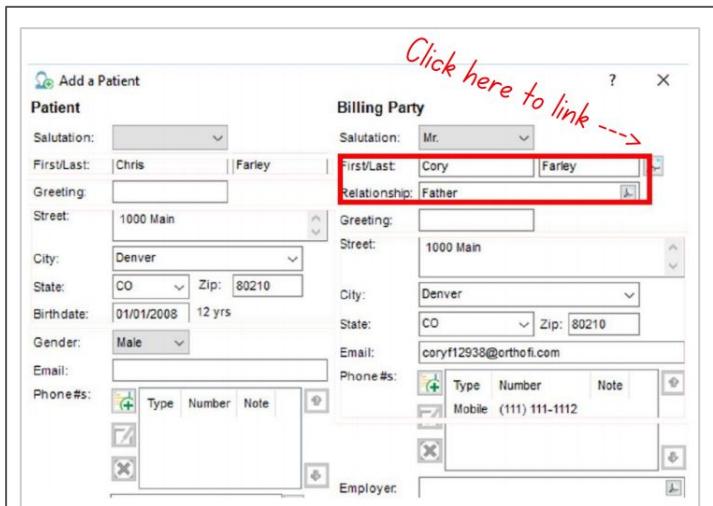
## Key Information

- Dolphin will automatically create and schedule patients when using pre-selected appt types: Patient Created, Exam Scheduled, Exam Rescheduled, Future Exam Scheduled
- Patients & Exams **cannot be deleted** from OrthoFi.
- Dolphin automatically sets Follow-Ups in OrthoFi whenever any of the following actions occur in Dolphin on the same day: Exam Cancelled, Exam No-Show

## Dolphin Scheduling Requirements

- The Patient Status **must be set**.
- **All required fields must be provided** in Dolphin in order to the integration to function.

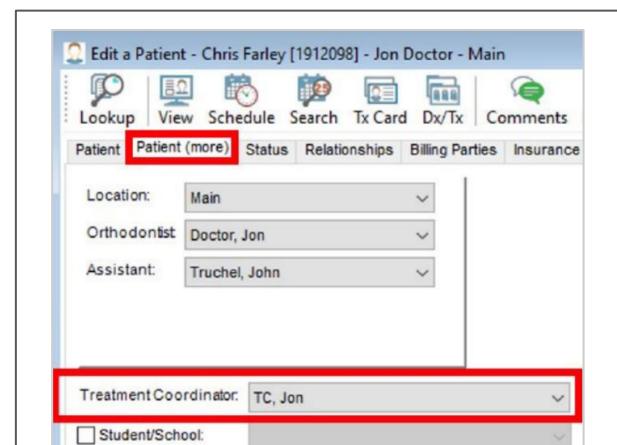
## Required Scheduling Fields



Click here to link

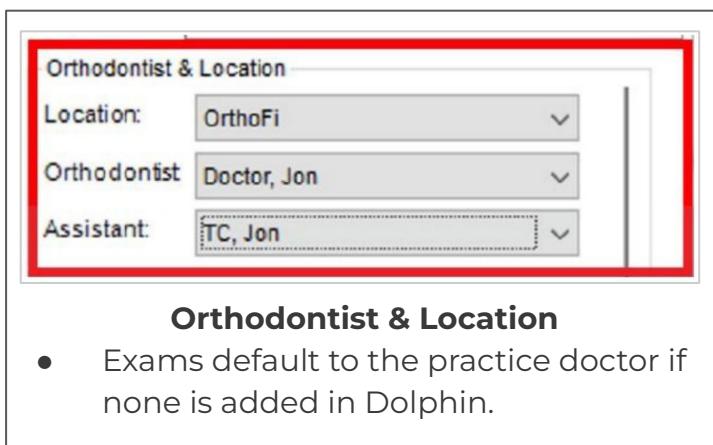
### Billing Party Linked

- You must link patients to the same Billing Party Record if they share one.
- You cannot have Billing Parties with duplicate records in Dolphin.



### Treatment Coordinator

- If no TC added in Dolphin, exam will import under the practice's Default TC



Orthodontist & Location

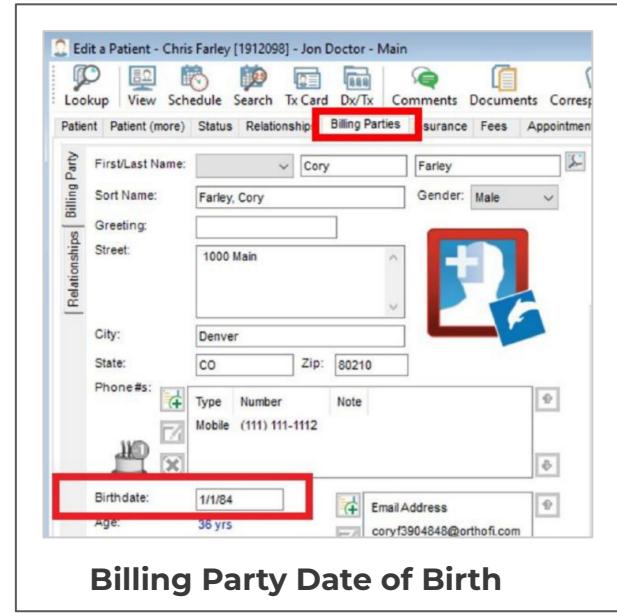
Orthodontist: Doctor, Jon

Location: OrthoFi

Assistant: TC, Jon

### Orthodontist & Location

- Exams default to the practice doctor if none is added in Dolphin.



Birthdate: 1/1/64

Age: 36 yrs

First/Last Name: Farley, Cory

Sort Name: Farley, Cory

Greeting:

Street: 1000 Main

City: Denver

State: CO Zip: 80210

Phone #s:

Employer:

### Billing Party Date of Birth

# Financial & Delinquency Features

OrthoFi Connect financial alerts are added to Dolphin patient records to let you know when patients are past due on their OrthoFi payment plans. These are accessible by your team and are updated if a patient makes a payment and becomes up to date on their contract.

## OrthoFi Ledger Link Button in Dolphin

An OrthoFi button will be available in Dolphin to connect you to the patient's Ledger without needing to change screens, login to OrthoFi, and search for the patient.

- Located in the **Favorites** section of Dolphin in the left navigation bar.
- The icon **must be installed individually** onto each PC using Dolphin.
- When a patient's profile **is displayed** in Dolphin, it will take you to that patient in OrthoFi.
- When a patient's profile **is NOT displayed**, it will take you to OrthoFi's patient search page in Google Chrome.

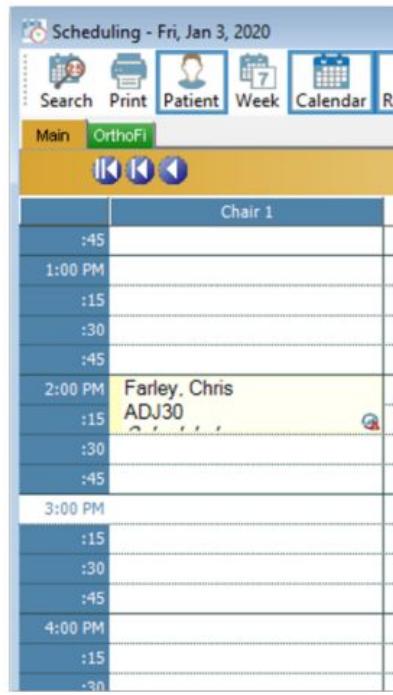
## OrthoFi Alerts & Comments in Dolphin

The delinquency alert icon will appear in four areas:

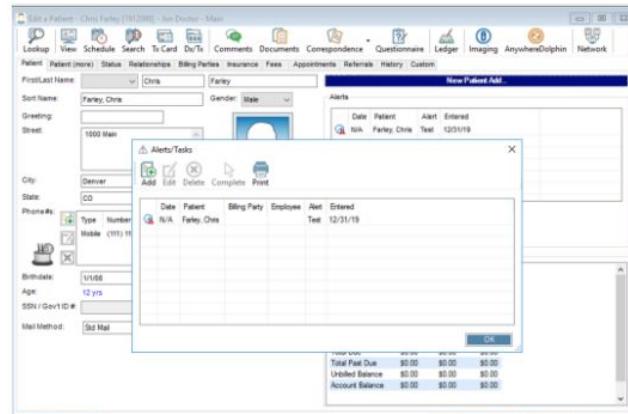
- Practice Schedule,
- Patient Profile
- Patient Alerts
- Checkout Wizard.

**Do not add patients directly into OrthoFi**, always use Dolphin. Patients that are manually created in OrthoFi **will not receive alerts**.

### Practice Schedule



### Patient Profile & Checkout Wizard



### Alert Icon



### Patient Schedule / Patient Bar



### Ledger Link Button

