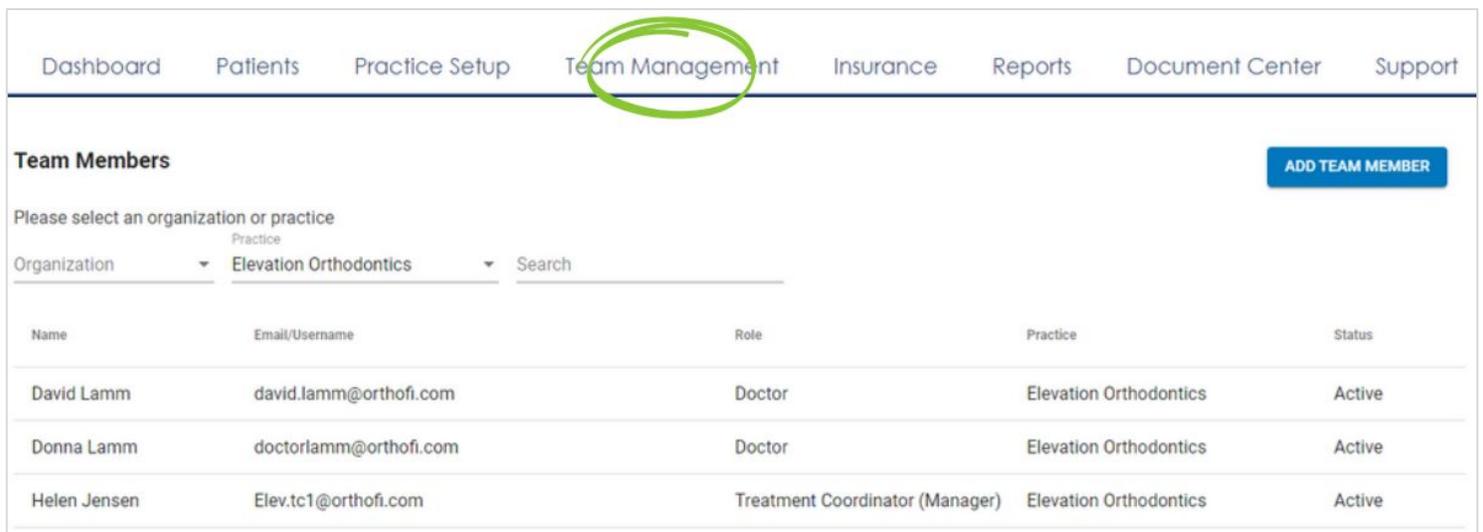


# Team Management & Permissions

**Team Management** allows you to add new staff members to OrthoFi, and control staff access to patient information, reports, and financial details within OrthoFi.

**Access:** Click the **Team Management** button at the top of your OrthoFi homepage.



Dashboard Patients Practice Setup **Team Management** Insurance Reports Document Center Support

**Team Members** ADD TEAM MEMBER

Please select an organization or practice

Organization Practice **Elevation Orthodontics** Search

Name	Email/Username	Role	Practice	Status
David Lamm	david.lamm@orthofi.com	Doctor	Elevation Orthodontics	Active
Donna Lamm	doctorlamm@orthofi.com	Doctor	Elevation Orthodontics	Active
Helen Jensen	Elev.tc1@orthofi.com	Treatment Coordinator (Manager)	Elevation Orthodontics	Active

## Key Functions

### Add and/or Manage Users

- Click on a user to edit their account
- Click Reset Password if staff member forgets their password
- Click Add Team Member to create a new user
- Select Locations and Permissions

### Assign a Role

- Treatment Coordinator
- Doctor
- Staff

Role \*

STAFF
  TREATMENT COORDINATOR
  DOCTOR

User needs manager permissions ?

### Select Permissions

- Choose individual permissions OR
- Apply a permission template
- See Glossary of Permissions in the following section

## User Permissions Glossary

### User Management

- Rights Management – Control all user permissions
  - Recommended for: Practice Manager

### Contract Adjustments

- **Manage Invoices:** Allows the user to make changes to invoicing schedules such as adjusting future payment dates, payment amounts, suspending invoicing schedules, etc.
  - Recommended for: Treatment Coordinator or Financial Coordinator
- **Refinance Contract:** Allows the user to make changes to a contract such as removing interest, changing the number of payments, and changing the monthly payment amount.
  - Recommended for: Treatment Coordinator or Financial Coordinator
- **Manage Costs and Courtesies:** Allows the user to apply an additional cost or courtesy/discount to an active contract. If the Refunds option is checked, the user will be able to refund these items on the contract.
- **Manage Refunds:** Allows the user to refund a payment as well as specific items on a contract as part of a contract change.
  - Recommended for: Practice Manager
- **Refund Late Fees:** Allows the user to refund an automated late fee charged by OrthoFi.
  - Recommended for: Practice Manager
- **Manage Write-Offs:** Allows the user to write off a contract balance. If the Refunds option is checked, the user will be able to refund specific items on the contract.
  - Recommended for: Practice Manager
- **Reinstate Contract:** Allows the user to activate a previously suspended contract/payment plan.
  - Recommended for: Practice Manager
- **Manage Down Payments:** Allows the user to change a down payment amount after the contract has been signed.
  - Recommended for: Practice Manager

- **Manage Treatment Options:** Allows the user to change a treatment option on an active contract. If the with Refunds option is selected, the user will be able to refund specific amounts as part of this contract change.
  - Recommend for: Practice Manager

### Fee Presentation

- **Slider Customizations:** Allows the user to make on-the-fly slider customizations such as remove the pay in full discount, change the down payment minimum, change the interest period, etc.
  - Recommend for: Treatment Coordinators

### OrthoInsights

- **Insurance AR Aging:** Allows the user to access the Insurance A/R Aging Report
- **Claim Status:** Allows the user to access Claim Status Report

### Reports

- **Deposit Report:** Allows the user to access all collections deposited into your account from OrthoFi on a weekly basis
- **Service Fees:** Allows the user to access service fee information your practice is being charged for OrthoFi services
- **Day Sheet:** Allows the user to access daily accounting of in-office cash and check payments
- **Delinquent Report:** Allows the user to access past due patient accounts including amount and days past due contract terms
- **Insurance Reconciliation:** Allows the user to access Explanation of Benefits by patient showing payments that OrthoFi has processed from insurance carriers, including payments for Non OrthoFi patients
- **Starts Report:** Allows the user to access patient level detail of all starts and production for the practice.

### Exam Management

- **Adjust Exam Result:** Allows the user to adjust the exam result after it has been set to treatment recommended.
- **Integrated Admin:** **EMERGENCY USE ONLY.** Manually creating exams and patients when integrated will create duplicates in OrthoFi. Please contact [integrations@OrthoFi.com](mailto:integrations@OrthoFi.com) prior to adding this permission to practice users

### Treatment Details

- **Treatment Fees:** Allows the user to make changes to the Treatment Fees section of Treatment Details.
- **Courtesies:** Allows the user to make changes to the Courtesies section of Treatment Details.