

# Support Call Authentication Process

Effective February 2nd, 2026

To ensure HIPAA compliance, all calls to the Support Team involving patient information will now follow a new verification process to access patient details. Please have the necessary information ready to help us assist you quickly and securely.

## What You'll Need to Provide When Calling Support

- 1. Practice Name:** Must match exactly how it appears in your OrthoFi portal.
- 2. Your Full Name:** Required to verify that you are authorized to request patient information.
- 3. Patient Information:**
  - Patient's Full Name
  - Patient's Date of Birth (DOB)

*All information must match exactly. We cannot provide patient information if any detail is incorrect or does not match our records.*

## How Authentication Works

When you call the Support team, you will be asked to confirm:

- Your **practice name**
- Your **full name**
- The **patient's name and DOB**
- For multiple patients from the same practice, **only patient name & DOB** are needed for each additional patient.

## If Verification Fails

- Patient information **cannot be shared.**
- The failed attempt will be documented.
- Practice leadership may be notified, and repeated failures may trigger security alerts or compliance review.

## Tips for a Smooth Call

- Have your practice name and patient information ready before calling.
- Double-check patient DOB in your internal records.
- Cooperate with verification questions to avoid delays.

**Thank you for helping us keep patient information secure.**