

NexHealth Connect

Job Aid

The NexHealth integration automatically migrates patient and exam data into OrthoFi from your PMSW, as well as automatically manages your OrthoFi schedule.

Step 1: Verify NexHealth Synchronizer Setup

1. Confirm that the NexHealth Synchronizer is installed and connected with your PMSW.
 - **If installed:** No further action is needed for this step.
 - **If not installed:** A member of OrthoFi's Integrations Team will contact you with instructions to complete the setup.

Notes:

- Once the synchronizer is set up, NexHealth will handle automatic data migration and schedule management.
- Ensure your PMSW is accessible to maintain accurate integration.

Key Rules

Key Integration Rules & Considerations:

1. **NexHealth Updates/Replaces Information in OrthoFi.** OrthoFi automatically updates to match NexHealth.
2. **Manage Patients, Schedules, and Appointments in NexHealth Only**
 - Add/create patients in NexHealth only. Once the connection is live, you will be unable to add patients into OrthoFi.
 - Do not schedule, reschedule, cancel, or adjust exam times in OrthoFi.
3. **Insurance Does Not Transfer to OrthoFi.** Add insurance directly into OrthoFi.
4. **OrthoFi Follow-Ups do not connect to NexHealth.** Set follow-up dates in OrthoFi only.
5. **NexHealth 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.**

NexHealth Support: Contact via email at support@nexhealth.com.