

How to Flag a Claim for Follow Up

1. On the **dashboard**, locate and select the patient whose claim you want to flag.
2. Click the “**I**” icon on the dashboard or navigate to the Insurance tab and click “**View Policy**” next to the patient’s name.
3. On the **Insurance Summary Page**, under the Insurance Policy tab, review the patient’s insurance status.
4. Look for indicators such as missed payments or requests for additional information by OrthoFi’s claims team.
5. On the right-hand side of the page, under the **Policy Actions** panel, click “**Flag for Claims Follow-Up.**”
6. Enter any relevant information in the Note box (*Ex: “Please identify the missing payment.”*).
7. **Upload files** (if necessary) or any supporting documentation related to the claim.
8. Click **Submit**.
9. The page will refresh, and your flagged action along with your note will appear at the top of the policy.

demoadmin@orthofi.com

[VIEW PATIENT DETAILS](#)

INSURANCE POLICY | POLICY TIMELINE | PAYMENT HISTORY

Delta Dental of Colorado
PRIMARY POLICY

Additional Claim Details

POLICY CLOSED
Does Not Cover Subscriber/Spouse
Policy is Closed. This policy does not cover Subscriber or Spouse as a patient and therefore no orthodontic benefits are available at this time. If the patient is active on another policy that may have Ortho coverage, please add it for verification.

BENEFIT PAYMENTS
Current Estimate \$ 0.00
Received \$ 0.00
Remaining \$ 0.00

Policy Details

Carrier Tel. (651) 123 - 1234

Group Name: KONOHA CORPORATION
Group Number: 12345-000-12345-12345
Subscriber ID: 000
Subscriber SSN: ---
Subscriber Address: 123 Demo Rd, Unit 123, MOUNTAIN CO, 12345
Subscriber Name: Hashirama Senju

Policy Actions

☐ Add Note/Attachment Only
☒ Flag for Claims Follow Up

Note
I've updated the requested information, and attached a copy of documentation.

[UPLOAD FILE](#)
[SUBMIT](#)

Add Notes
Upload Files