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.