

How to Schedule Automated Pending Patient Follow-Ups

This guide explains how to set-up an automated pending patient follow-up campaign.

How it Works

Once treatment is recommended and a slider is emailed to a patient, a pending patient follow-up campaign ensures timely reminders are sent automatically. This helps keep patients engaged and your team on top of pending cases.

How to Set Up An Automated Patient Follow-Up Campaign

1. From the Slider, click the 3-dot button (⋮) in the upper right-hand corner
2. Select **Send to Email** to enter an optional message and send the initial email with the Payment Slider link
3. Click **Send & Set Follow-Up**

The screenshot displays the 'Ellie Jameson's Payment Plan' interface. It features two sliders: 'Down Payment' with a value of \$2,850.00 (between \$1,250.00 and \$6,200.00) and 'Monthly Payment' with a value of \$304.55 (between \$158.18 and \$3,350.00). A 3-dot menu in the top right corner is highlighted with a yellow box. A yellow arrow points from this menu to a dropdown menu where 'Send to Email' is selected and highlighted with a yellow box. Another yellow arrow points from the 'Send to Email' modal to the 'SEND & SET FOLLOW-UP' button at the bottom right, which is also highlighted with a yellow box.

Ellie Jameson's Payment Plan

Down Payment < \$2,850.00 >

MOST POPULAR \$1,250.00 DISCOUNT \$6,200.00

Monthly Payment < \$304.55 >

INTEREST \$158.18 \$3,350.00

Send to Email

From: support@orthofi.com

Subject: Review Your Payment Options

To: Katie Jameson Email: motherofelliejameson@Orthofi.com

+ Add Email

Message (optional)

Message: Hi Katie,
It was great meeting you and Ellie today.

Email Settings

What language would you like the email translated to? English

CANCEL SEND & SET FOLLOW-UP

How to Set the Set Follow-Up Schedule

1. After clicking **Send & Set Follow Up** via the Slider, confirm the schedule and Primary Contact who will receive the automated messages.
2. Scroll down to the **Follow-Up Details** section
3. Use dropdown to enter **Follow-Up Reason**
4. Enter your **Follow-Up notes**
 - a. Notes are **not** visible to the Primary Contact
5. Confirm Primary Contact Name
6. Confirm Primary Contact Mobile number:
 - a. Can only be set for a Primary Contact
 - b. Changes update the Primary Contact's
7. Click **SAVE**

Follow-Up Details
Follow-Up Reason *
Financial

Follow-Up Note
The guardian would like to discuss with her partner before committing to a contract

Follow-up texts and emails will be sent to the Primary Contact, please ensure their contact details are correct:

First Name *
Katie

Preferred Name
Jameson

Email
motherofellie123@orthofi.com

Mobile *
(555) 555-5555

SAVE **CANCEL**

Set Follow-Up Type

Automated Follow Up **NEW** Follow Up Reminder

Pending Patient Follow-Up Schedule
The schedule is a mix of automatic text and email messages sent to pending patients/guardians on your behalf, and also, call reminders for a personalized touch. It will stop when either the recipient takes an action or you turn it off.

Follow-Up Start Date *
5/13/2021

Schedule Duration: 11 Weeks

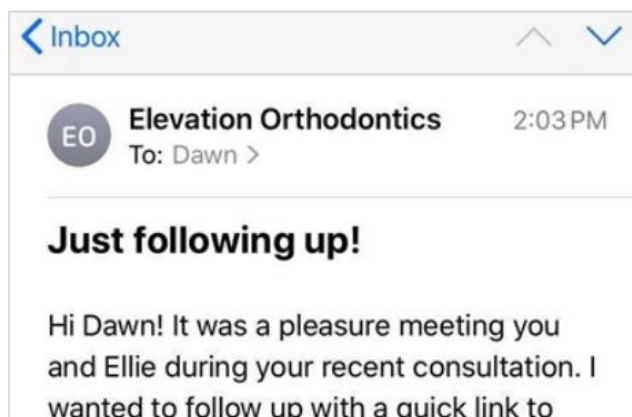
Week 1	TEXT Review Your Payment Plan Friday, May 14
	CALL REMINDER Follow-Up Call 1 Sunday, May 16
	EMAIL Just Checking In... Wednesday, May 19
Week 2	TEXT Customize For Your Budget Thursday, May 27
Week 3	EMAIL First Impressions Are Everything Thursday, June 3
Week 5	CALL REMINDER Follow-Up Call 2 Sunday, June 13
Week 6	EMAIL Benefits Of A New Smile Friday, June 18
Week 8	TEXT Last Text Attempt Friday, July 2
	EMAIL Preventative Care Thursday, July 8
Week 11	EMAIL Last Email Attempt Wednesday, July 28

How to Set the Set Follow-Up Schedule (Cont.)

Automated Schedule Details

- The 11-week schedule includes a mix of personalized email, text messages, and scheduled call reminders
- The Follow-Up Schedule Start Date is automatically set for the day after the exam with the first text message sent 24 hours later. If needed, you may change the date to delay the start of the Follow-Up Schedule
- **Messages:** The patient's primary contact will receive 3 text messages and 5 emails. The message schedules cannot be customized.
- **Call Reminders:** The Treatment Coordinator (TC) will receive 2 call reminders on Day 3 and Day 31 of the campaign. These reminders will appear in the Follow-Up filter on your dashboard.
- **Sender Information:** Emails will come from noreply@orthofi.com, but will display your practice name as the sender. Each practice location has its own phone number for text messages.
- **Activity Log:** All Follow-Up Schedule actions/activities are recorded in the Patient Detail Page's Communications Tab. This includes sent emails, sent texts, and completed follow-up calls.

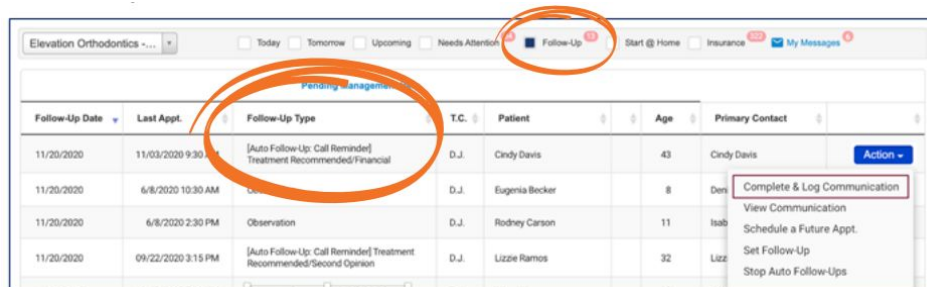
Type	Days
Text	1
Call Reminder	3
Email	6
Text	14
Email	21
Call Reminder	31
Email	36
Text	50
Email	56
Email	76



Managing TC Call Reminders

When a Treatment Coordinator sees a call reminder in their Follow-Up filter:

- Click **Action**.
- Select **Complete & Log Communications** after you've made the call.
- You can also set additional follow-up reminders as needed.



How to End Scheduled Messages Early

A follow-up campaign can be stopped manually or automatically.

How to Manually Stop a Campaign

- From the Patient Detail Page, navigate to the Exams tab, then click Action > Stop Auto Follow-Ups.
- From the Follow-Up Filter on your dashboard, click Action > Stop Auto Follow-Ups.

Automatic Campaign Stops

The campaign will automatically end if any of the following events occur:

- The patient replies "stop" to a text message or clicks "unsubscribe" in an email.
- The patient's **Exam Result** is changed to "Do Not Pursue" or "Declined Tx."
- A guardian opts out. The patient will then be placed in the **Needs Attention** filter.
- The contract is signed and a **Start Date** is set.