

Guardian Linking Job Aid for Practices

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Overview

This job aid explains how to verify and link guardian accounts when they visit your practice. It includes:

- The updated process for creating patients and guardians
- How guardians link their accounts
- Tips to help guardians complete verification
- Tools to troubleshoot common issues

What Is the Guardian Linking Process?

The guardian linking process allows a guardian who has already registered their email with one practice to securely connect (link) that existing account to a new practice.

Why Is the Guardian Linking Process Necessary?

This new process replaces the previous account merge verification method.

With the updated approach, guardians will be required to log in securely to their existing account, and accurately match patient and guardian details to complete the linking process.

This improved process:

- Reduces friction during patient creation
- Simplifies access to important information like forms, contracts, and payment methods
- Provides a more secure and streamlined experience for guardians

Step-by-Step: Patient Creation

1. Go to the Patient Create Page

- Enter **Patient, Guardian,** and **Exam details.**
- Click **Create Patient.**
- Integrated Practices:** If your practice uses a PMSW, this step **does not apply.** Your existing patient creation process will remain unchanged.

Important: The identity confirmation pop-up for guardians is no longer used. The new guardian linking process replaces this step.

Patient Details

Please enter patient data. The patient's date of birth will determine how you enter the contact information.

Practice
5 Star Orthodontics

First Name
Bryce

Last Name
Hart

Date of Birth
08/08/2010

Primary Contact Info

This person will be contacted about medical forms, practice announcements, and appointments.

Email Address
fake.user@orthofi.com

This person does not have an available email address

First Name
Karla

Last Name
Hart

Phone Number
(456) 456-4564

Phone Number Type (select one):
 Cell Home Work

Exam Details

The exam information is tied to a patient's record and determines multiple processes, including follow-up.

This person does not need an exam

Exam Type (select one): *
 New Patient Observation Recall Ready Phase Two

Exam Date
04/02/2026

Exam Time
9:00 am

How would you like to send patient forms communication?
 Email
 Text Message

Next Step: Insurance

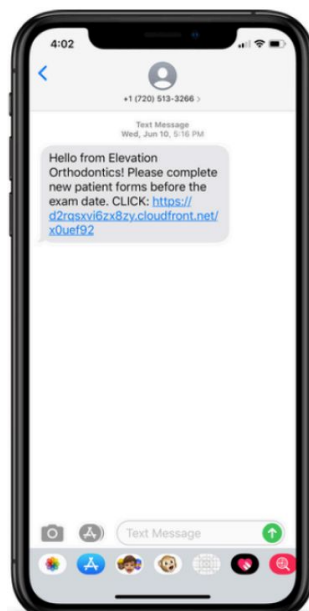
Adding patient insurance now means that eligibility can be verified before the patient gets to the office.

2. Add Insurance Information (Optional)

- Include insurance details if available.

After patient creation:

- The guardian receives an email and/or text to complete forms for the new account.
- Guardian will click the provided button to complete the forms.



{Practice's name} New Patient Forms

OrthoFi Customer Support
To: fake.user@orthofi.com

YOUR LOGO HERE

Dear {Guardian's Name},

The team at {Practice's Name} is excited to see you and {Patient's Name} on Thursday, April 2, 2026 at 9:00AM!

We've partnered with OrthoFi to help simplify the collection of patient information, insurance processing, and billing to offer you the most flexible payment options possible. Your right to privacy is of the utmost importance to us, and we use the latest technologies to ensure your information is safe and secure.

To make the day of your upcoming appointment as smooth as possible, we would appreciate you filling out your **New Patient Exams Forms** online prior to your visit. Please have your insurance information on hand to speed up the process.

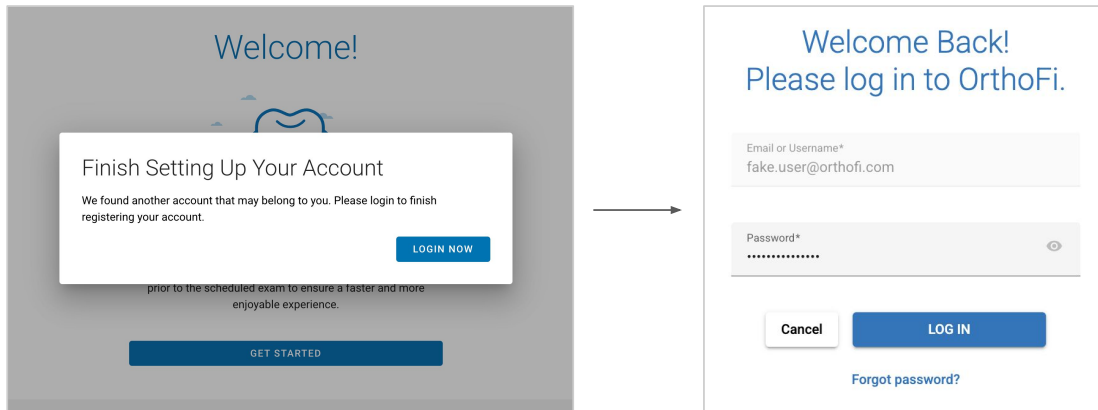
Verification Process for Guardians

Verification Process for Guardians

1. Guardian Access & Login

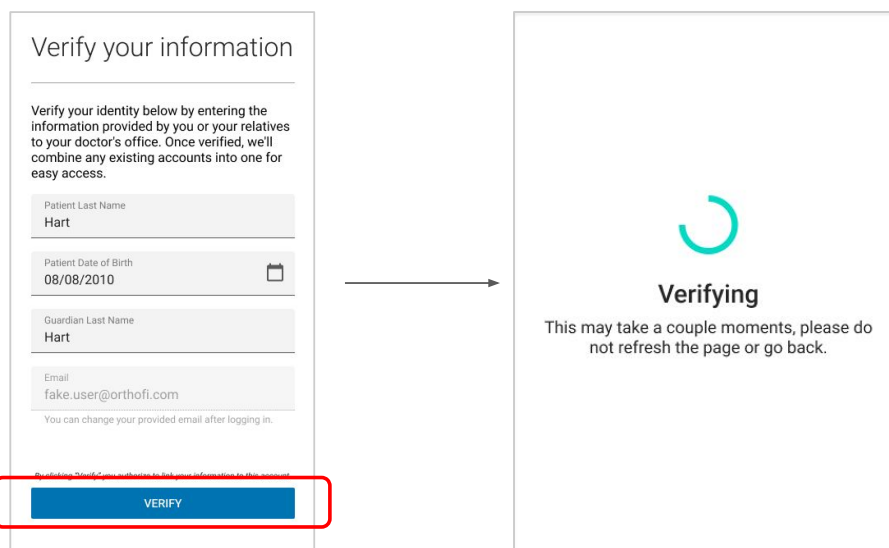
- a. When the guardian clicks the link to complete their forms, a pop-up will appear prompting them to log in to their existing account.

Important: Any link used to access forms (by the guardian or practice staff) will always require the guardian to **log in to their existing account** before proceeding.



2. Guardian Verification & Account Linking:

- a. After logging in, the guardian will be asked to verify the following information:
 - i. Patient Last Name
 - ii. Patient Date of Birth
 - iii. Guardian Last Name
- b. Once all fields are completed, the **Verify** button will become active.
- c. The guardian clicks **Verify** to successfully link their accounts.



Important: The information entered must match exactly what was provided during patient creation in **Step 1**.


Verification Process for Guardians (Cont.)

3. Verification Outcomes & Next Steps

- a. **Verification Succeeded:** If the entered information matches, the verification is complete. The guardian can proceed to:
 - i. Complete forms
 - ii. View all patient exams linked to their account
- b. **Verification Failed:** If the information does not match:
 - i. The guardian can review their entries and try again
 - ii. They may also contact the practice to confirm the correct information on file
- c. **Attempts Exceeded**
 - i. Guardians have **up to 5 attempts** to verify their information. After 5 unsuccessful attempts, verification will be locked, and the guardian must contact the practice for assistance
 - ii. **Practice staff will need to:**
 1. Confirm or update the information on file
 2. Reset the verification process
 3. Resend the forms email

Important: Verification attempts are limited to five to protect account security. If the guardian cannot verify their information, they should reach out to the practice for help.

Verification Succeeded




All set!
We successfully merged your account.


[GO TO FORMS](#)

[GO TO PATIENT DETAILS](#)

Verification Failed




Contact your practice
The information you entered doesn't match our records. Please double-check for typos and try again.

 **If you have more than one child registered, try using a different child's details.**

[TRY AGAIN](#)

If this keeps happening contact [{practice name}](#) at [{practice phone number}](#) for further information.

Attempts Exceeded



Attempt limit exceeded
The information you entered doesn't match our records.

Contact [{practice name}](#) at [{practice phone number}](#) for assistance with accessing your account.

Support for Unsuccessful Verification

Practice staff should be prepared to assist guardians who are unable to successfully link their accounts.

Steps to Support the Guardian

1. **Locate the Patient Record:** Use Global Search or Patient Search to find the patient associated with the guardian.
2. **Access Guardian Details:** From the Patient Details page, click the guardian's name to open the Guardian Details page.
3. **Review Information on File:**
 - a. Select the patient or guardian name to review stored details.
 - b. Ensure all information is accurate and complete, as this must match what the guardian enters during verification.

Patient Details Screen

Patient: Bryce Harth [New Communication](#) [New Misc Charge](#)

Contact **Karla Hart (PC)** ⚠️ ✖️

[Add Guardian](#)

Base Locations ?

Smith & Davis Orthodontics: [RCM](#) Rogers

[Payment Plans](#) [Exams](#) [Misc. Charges](#) [Insurance](#) [Communications](#) [Ledger](#)

Guardian Details Screen

Responsible Party: Karla Hart ⚠️ UNSUCCESSFUL [Resend Verification Email](#)

[Linked Patients](#) [+ New Link](#)

Patient Name: Bryce Harth

Next Exam: 03/30/2026 05:00 PM (practice local time)
Smith & Davis Orthodontics
604 S. 52nd St. , Rogers, AR 72758
(479)286-0040

4. Verify and Update Information

- Confirm the guardian's identity using the information on file. **If any details are incorrect**, update the information in the system
- If required fields are missing:
 - Enter **"Placeholder"** in required fields (if appropriate)
 - The guardian can update this information later when completing forms

Guardian Account Management Screen

Account Management - Karla Hart

Email / User Name ⓘ Has Registered? No

Contact Email ⓘ

First Name Middle Initial Last Name Suffix

Preferred Name Date of Birth Gender Male Female

Steps to Support the Guardian (Cont.)

5. Review Patient Contact Information:

- a. Navigate to the Patient Contact Info screen and review all patient information on file
- b. If any details are incorrect:
 - i. Update the information to ensure accuracy
- c. If required fields are missing:
 - i. Enter “**Placeholder**” where needed
 - ii. The guardian can update this information later when completing forms

Patient Contact Info Screen

Patient Contact Info - Bryce Harth

Patient First Name *	Patient Middle Initial	Patient Last Name *	Patient Suffix
Bryce		Harth	
Patient Preferred Name	Patient Date of Birth *	Gender	
	08/08/2010	<input type="checkbox"/> Male <input type="checkbox"/> Female	

Patient Contact Info - Bryce Hart

Patient First Name *	Patient Middle Initial	Patient Last Name *	Patient Suffix
Bryce		Hart	
Patient Preferred Name	Patient Date of Birth *	Gender	
	08/08/2010	<input checked="" type="checkbox"/> Male <input type="checkbox"/> Female	

6. Resend Verification Email

- a. **Important Requirement:** After confirming all information is accurate and complete, you must **retrigger the forms reminder email**
- b. This email will:
 - i. Be sent to the guardian and include a link to access the patient forms
 - ii. Prompt the guardian to complete the verification process

Responsible Party: **Karla Hart** UNSUCCESSFUL [Resend Verification Email](#)

Verification email has been resent.

7. Patient Forms Reminder Email

- a. The verification email contains a direct link to the new patient forms
- b. The guardian must use this link to complete verification and continue

{Practice's name} Patient Forms Reminder

OrthoFI Customer Support
To: fake.user@orthofi.com

YOUR LOGO HERE

Dear {Guardian's Name},

The team at {Practice's Name} is excited to see you and {Patient's Name} on 04/02/2026 at 9:00AM!

In order to make your exam day as quick and simple as possible, please take a few minutes to complete the required **Patient Exam Forms**.

[CLICK HERE TO COMPLETE FORMS](#)

If you have any questions, please do not hesitate to contact the office at {Practice's Phone Number}.

Thank you,

Welcome!

Finish Setting Up Your Account

We found another account that may belong to you. Please login to finish registering your account.

[LOGIN NOW](#)

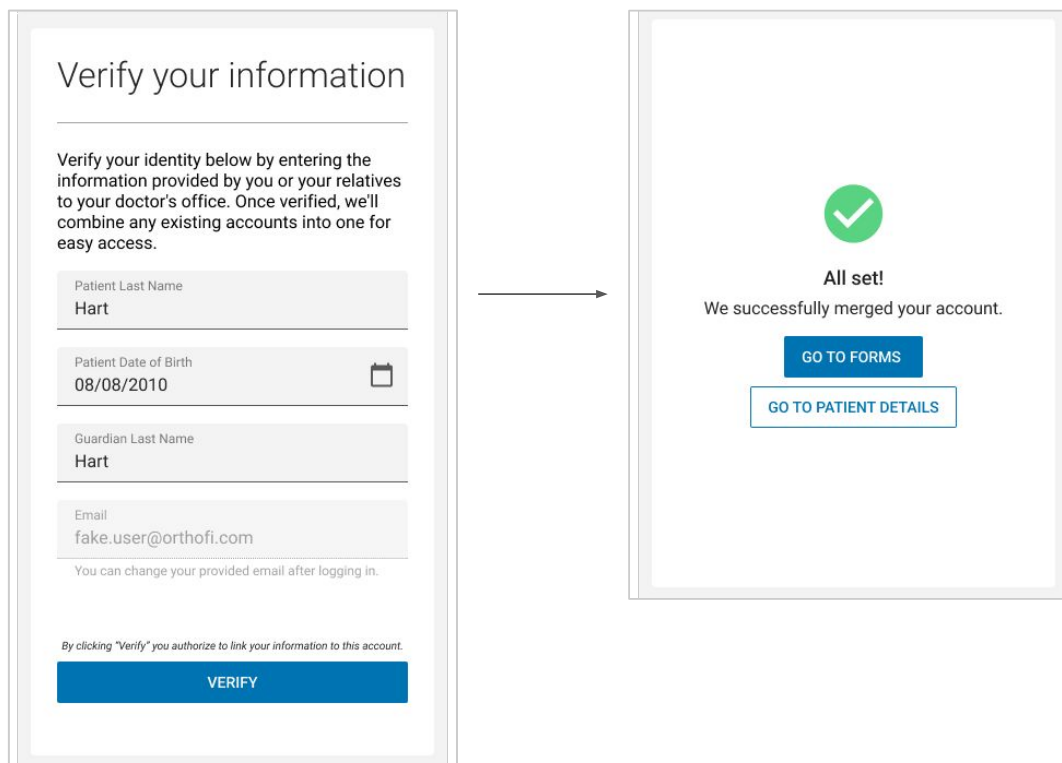
prior to the scheduled exam to ensure a faster and more enjoyable experience.

[GET STARTED](#)

Steps to Support the Guardian (Cont.)

8. Verification Complete

- a. Once the guardian enters the correct information and completes verification, the process is successfully completed
- b. The guardian can then proceed to complete required forms before their exam.



Have Questions or Need Support?

Contact our Support team Monday–Friday, 6:00 AM–5:00 PM (MST) at 877-766-5220, or email us support@orthofi.com.