OrthoFi

Pending Patient Follow-Ups: Automatic Enrollment

Automatic enrollment - no manual follow-up setup required

Automated Follow-Up Overview

The Automated Pending Patient Follow-Up program helps re-engage prior non-start prospective patients, increasing pending conversions while complementing your team's personal touches.

How it Works / Enrollment

When the TC recommends treatment, the patient is **automatically enrolled** in the Pending Patient Follow-Up campaign, requiring **no manual setup.** Follow-up messages begin automatically according to the existing campaign schedule.

Details:

- **Enrollment**: Automatic when treatment is recommended and the Payment Slider is sent to the patient
- **Duration**: 11 weeks (76 days)
- **Start Date**: Starts day after the exam with the first text message sent 24 hours later.
- **Recipient**: The primary contact for patients with a status of "Treatment Recommended"
- **Touchpoints**:
    - 3 automated personalized text messages
    - 5 automated personalized emails
    - 2 TC call reminders in the **Follow-Up** filter on the OrthoFi dashboard

What's Changed?

- **Automatic enrollment**: Patients are automatically enrolled when treatment is recommended and the Payment Slider is sent. View the job aid for manual setup here.
- **No manual setup**: No need to select **Auto Follow Up** or **Manual Follow Up.**
- **Dashboard update:** "Tx Recommended, No Follow-Up Set" will no longer appear under the Needs Attention filter.

Cancelling or Completing Auto Follow-Up Messages

How to Manually Stop Follow-Ups:

- From the Payment Slider > Click the three dots > Select Stop Auto Follow-Ups
- From the Patient Detail Page > Exams tab, then click Action > Stop Auto Follow-Ups.
- From the Follow-Up Filter on your dashboard, click Action > Stop Auto Follow-Ups.

Automated Follow-Ups Stop When:

- 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.

Follow-Up Content Types & Schedule

Each message includes a link to the patient's slider to drive Sign@Home starts, and all follow-up activity is logged automatically in the Patient Detail Page Communication tab.

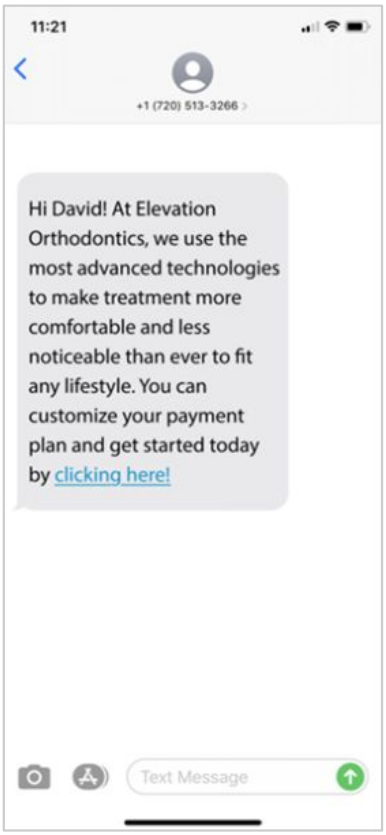
Content Types:

- **Emails**: Send from noreply@orthofi.com and displays your practice name as the sender
- **Texts**: Sends from your practice phone number
- **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

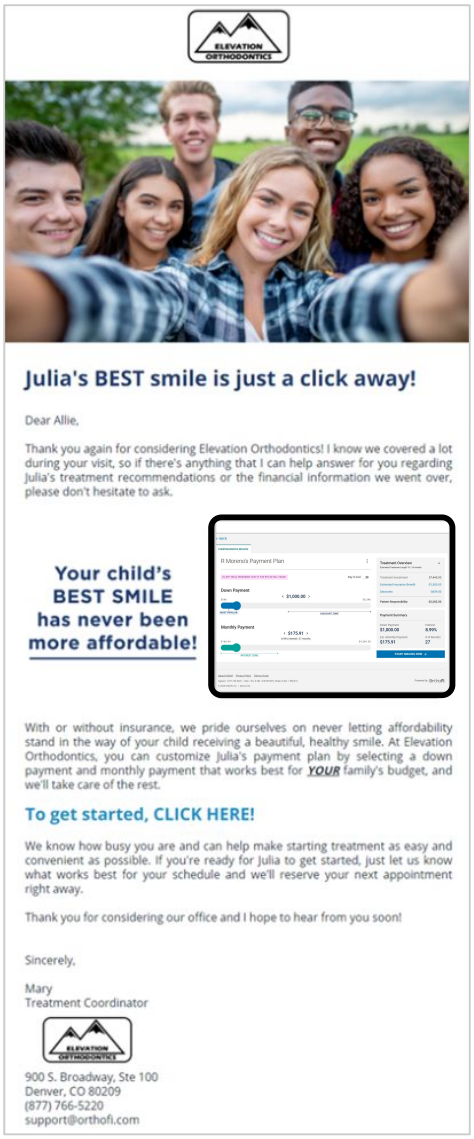
Follow-Up Content Schedule

- **Day 01:** Text Message
- **Day 03:** Call Reminder
- **Day 06:** Email
- **Day 14:** Text Message
- **Day 21:** Email
- **Day 31:** Call Reminder
- **Day 36:** Email
- **Day 50:** Text Message
- **Day 56:** Email
- **Day 76:** Email

Text Message Example



Email Example



Email Example

