

How to Dismiss Patients from Pending & Follow-Up Campaigns

New Feature Update: This job aid reflects the introduction of the **Dismiss Patient** feature, which replaces the former **Do Not Pursue** and **No Follow-Up** options.

Table of Contents

1. [What's Changing](#)
2. [Where 'Dismiss Patient' Appears in OrthoFi](#)
3. [When to Use Dismiss Patient](#)
4. [What Happens When a Patient Is Dismissed](#)
5. [How to Dismiss a Patient Via the Action Dropdown](#)
6. [Restoring a Dismissed Patient](#)
7. [FAQ](#)

Overview

This job aid supports the rollout of the new **Dismiss Patient** feature. It explains how to remove patients from pending or follow-up communication campaigns using the updated workflow, which replaces the former *Do Not Pursue* and *No Follow-Up* options.

What's Changing

The new **Dismiss Patient** option replaces the following options in OrthoFi, and provides an easy way for practices to remove patients from pending or follow-up communication campaigns.

Removed options:

- **Do Not Pursue:** Option removed from the **Action** dropdown menu, and removed as an Exam Result option within the Cheat Sheet.
- **No Follow-Up:** Option removed from the **Exam Management** pop-up window.

Where 'Dismiss Patient' Appears in OrthoFi

The Dismiss Patient option appears in multiple locations in OrthoFi to support different workflows:

- **Action Dropdown:**
 - Available on the **Dashboard** for a patient record, regardless of which Dashboard filter view is selected (e.g., Today, Tomorrow, Needs Attention, etc.).
 - Available on the **Patient Details** page for the selected patient.

When to Use “Dismiss Patient”

Use **Dismiss Patient** when a patient should no longer receive automated or manual follow-up communications.

Common scenarios include:

- Patient is no longer interested
- Patient is no longer eligible
- Duplicate or invalid patient record
- Patient requested no further outreach

This ensures that marketing, recall, and follow-up campaigns only target appropriate patients.

What Happens When a Patient Is Dismissed

When a patient is dismissed:

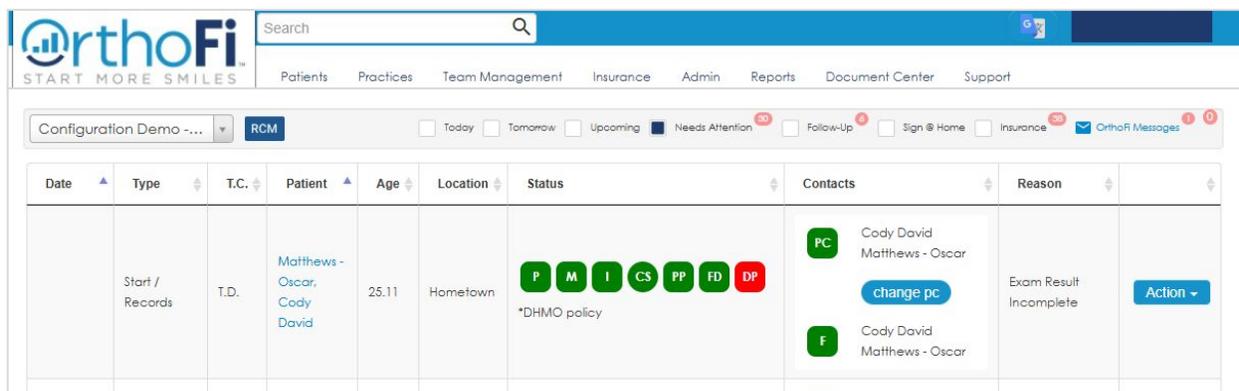
- All auto-follow-ups are canceled
- All manual follow-ups are removed
- The patient is removed from active dashboards
- No other patient or exam data is changed

Dismissal is fully tracked for visibility and auditing.

How to Dismiss a Patient Via the Action Dropdown

Step-by-Step Process

1. **Navigate to the Dashboard:** View all patients and search for the patient you want to dismiss.



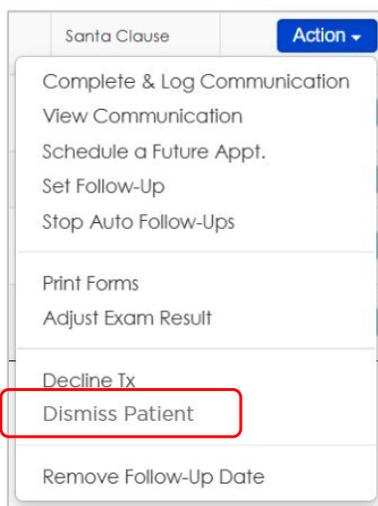
The screenshot shows the OrthoFi patient dashboard. At the top, there is a search bar and navigation tabs for Patients, Practices, Team Management, Insurance, Admin, Reports, Document Center, and Support. Below the navigation, there is a filter bar with options like 'Configuration Demo -...', 'RCM', and various filters for 'Today', 'Tomorrow', 'Upcoming', 'Needs Attention', 'Follow-Up', 'Sign @ Home', 'Insurance', and 'OrthoFi Messages'. The main content area is a table with columns for Date, Type, T.C., Patient, Age, Location, Status, Contacts, and Reason. The patient record for Cody David Matthews-Oscar is highlighted, showing a status of 'DHMO policy' and a 'change pc' button. An 'Action' dropdown menu is visible next to the patient record.

Date	Type	T.C.	Patient	Age	Location	Status	Contacts	Reason	
	Start / Records	T.D.	Matthews - Oscar, Cody David	25.11	Hometown	P M I CS PP FD DP *DHMO policy	PC Cody David Matthews - Oscar change pc F Cody David Matthews - Oscar	Exam Result Incomplete	Action

2. From the Dashboard **or** within the patient record, click the **Action** dropdown.

Exam Date	Exam Type	Location	Treatment Coordinator	Patient Forms (next steps)		Status	
10/12/2023 10:30 AM	New	Configuration Demo - Hometown	TC Demo Config	P M I CS PP FD DP	PC Sharon Needles F Sharon Needles	Pending Financing Selection	Action ▾

3. Select “**Dismiss Patient**” from the dropdown menu.



4. Complete the Dismiss Patient pop-up.

- Select a **dismissal reason**
- Add an **optional note** (recommended for context)
- Click **Submit**

Dismiss Patient [Close]

Reason?

Dismissal Notes

i Dismissing this patient will remove them from your dashboard.
To find their record again, use the "Search" field at the header.

Submit ▶

Important:

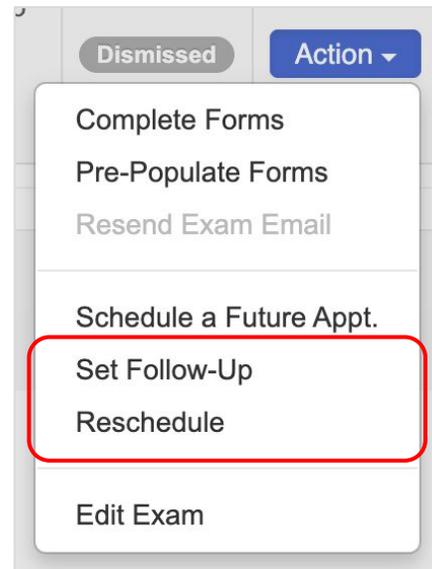
- Dismiss Patient is always available **unless** the patient has an active contract.
- Patients with an active contract **cannot be dismissed**.

Restoring a Dismissed Patient

Dismissed patients can be reactivated at any time if follow-up is needed again.

How to Restore a Patient

- Search for the patient, and open the patient record.
- Click the **Action** dropdown, and select one of the following actions:
 - Set Follow-Up
 - Reschedule Exam
- Completing either action will:
 - Restore the patient
 - Reactivate them on the dashboard
 - Resume normal follow-up workflows



Frequently Asked Questions (FAQ)

Can I dismiss a patient who has already started treatment?

No. Patients who have already started treatment cannot be dismissed from campaigns.

What happens after I dismiss a patient?

The dismissal only removes the patient from communication campaigns, and the patient will no longer appear on the Dashboard for pending or follow-up campaigns.

What is the difference between Dismiss Patient and Write-Offs/Dismissals?

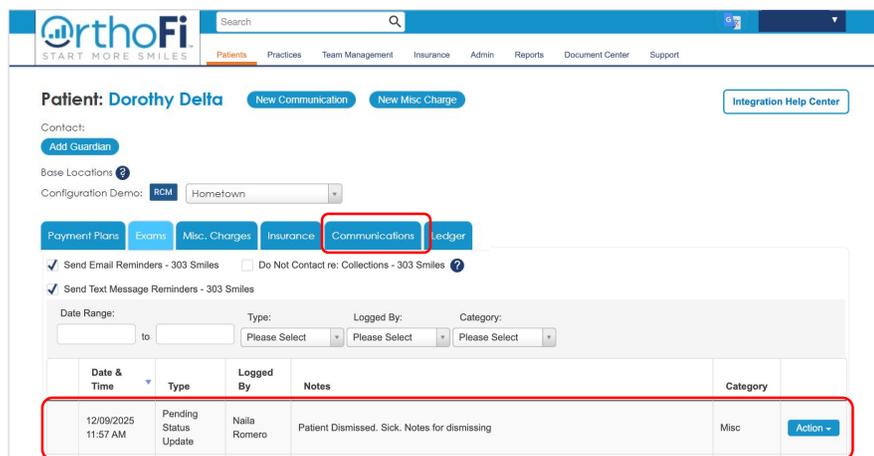
The *Dismiss Patient* feature is for communication workflow management only.

Write-Offs/Dismissals are financial actions used to fully write off or dismiss a patient's contract. These are two distinct features. Because you cannot dismiss a patient who has an active contract, the two features will never overlap.

Where can I review dismissal details?

All dismissal activity can be reviewed in the **Communications tab** of the patient record, including:

- Dismissal reason and notes
- Date and time of dismissal
- Staff member who completed the action



Communications Tab

 **Video Overview:** [Watch the 3-minute walkthrough.](#)