OrthoFi
START MORE SMILES

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.

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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:

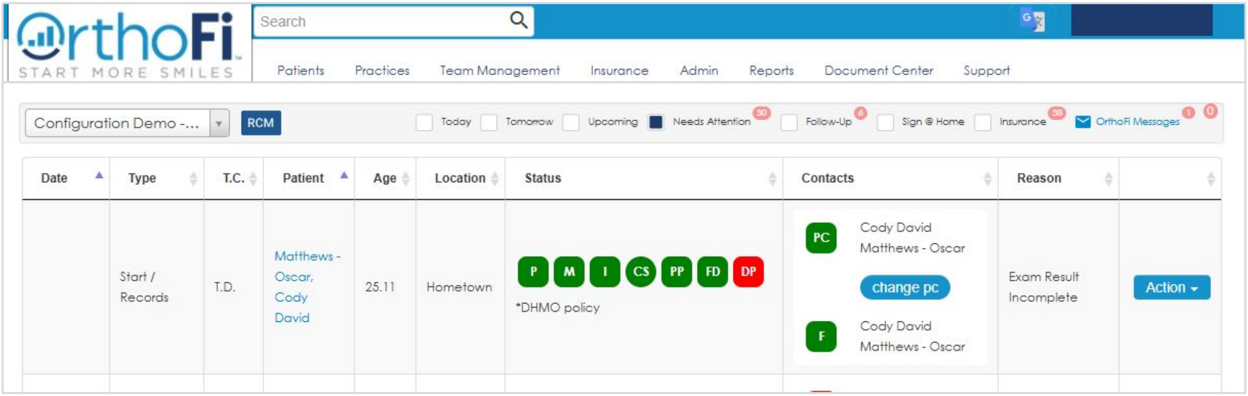
- All auto-follow-ups are canceled
- All manual follow-ups are removed
- The patient is removed from active dashboards
- No other patient or exam data is changed

Dismissal is fully tracked for visibility and auditing.

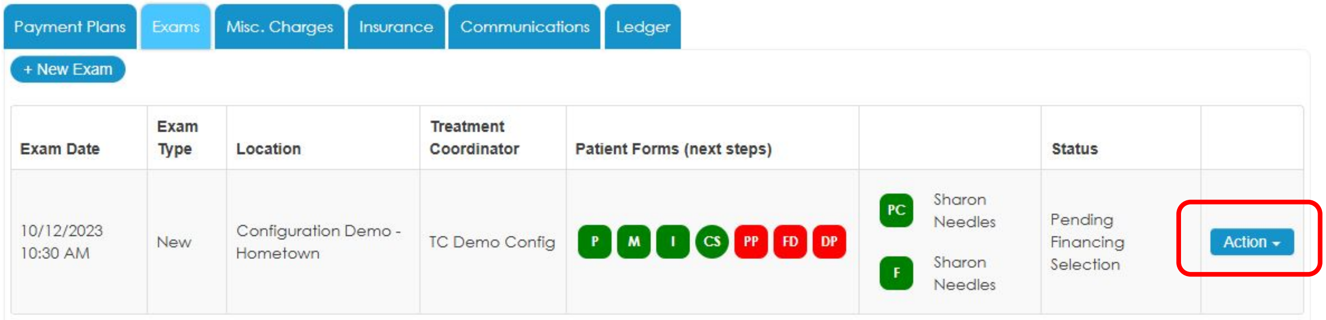
How to Dismiss a Patient Via the Action Dropdown

Step-by-Step Process

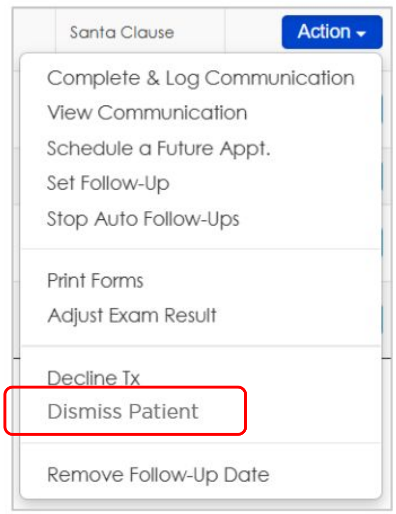
1. **Navigate to the Dashboard:** View all patients and search for the patient you want to dismiss.



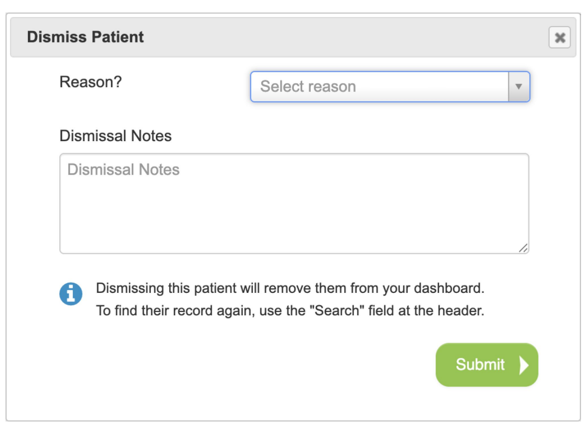
2. From the Dashboard **or** within the patient record, click the **Action** dropdown.



3. Select "**Dismiss Patient**" from the dropdown menu.



4. Complete the Dismiss Patient pop-up.
    a. Select a **dismissal reason**
    b. Add an **optional note** (recommended for context)
    c. Click **Submit**

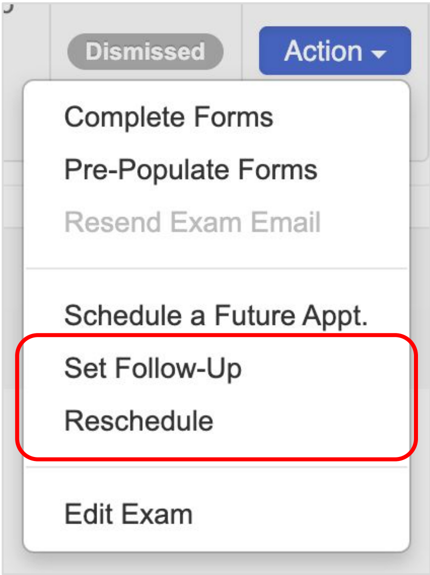


Important:

- 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)

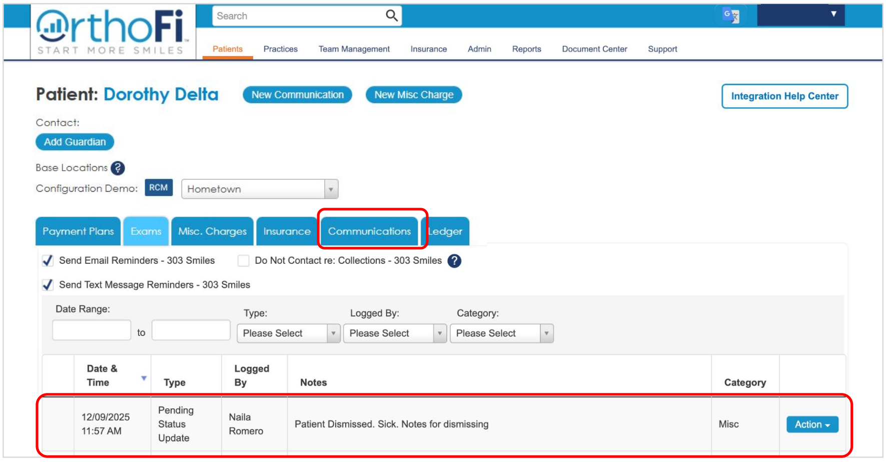
Can I dismiss a patient who has already started treatment?
No. Patients who have already started treatment cannot be dismissed from campaigns.

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 <u>Dismiss Patient</u> and <u>Write-Offs/Dismissals</u>?
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](#).