OrthoFi

SUCCESS STORY



level UP ORTHODONTICS

PRACTICE TYPE
Orthodontics

LOCATION
Parker, CO

SOLUTIONS
OrthoFi

How LevelUp Orthodontics Reached 90% Case Acceptance While Growing Net Production Per Start by 32%

Six years after partnering with OrthoFi in its first year, LevelUp has freed its team from admin, put patients in control of their payment plans, and kept delinquency near zero.

90%
Case acceptance, rolling 12 months

+32%
Net production per start
($4.3k → $5.7k)

+26%
Start growth, with ~30% production growth

~$51k / YEAR
Revenue via in-network fee optimization

AT A GLANCE

PUTTING AN ALL-STAR TEAM ON OFFENSE

After building his career in Canada, where rigid, high-down-payment financing kept conversion low, Dr. Colby Gage set out to build LevelUp Orthodontics differently from the ground up. LevelUp partnered with OrthoFi within its first year in business, with two goals: free the team to play offense instead of getting buried in admin, and give patients ownership over their own payment plans.

Six years later, LevelUp has grown to 90% case acceptance, 26% start growth, and nearly 30% production growth, all while keeping delinquency near zero and running a lean team. Dr. Gage credits much of this success to OrthoFi's capacity to free up their office manager to do what she does best: making patients feel like family and driving revenue for the practice.

THE CHALLENGE

You Can't Replace What Makes Your Team Special

LevelUp's first key hire was Treatment Coordinator & Office Manager Michelle Heitland. With a decade of medical billing experience, Michelle is well qualified to handle insurance verification and collections calls, but what makes her truly invaluable is her ability to build relationships with patients.

As the practice quickly grew and the administrative burden began to consume more of Michelle's time, she tried to delegate key touchpoints. She explains, "I tried to have other people just take the new patient phone call and my conversion rate would drop."

It quickly became clear that Michelle needed to spend less time on admin so she could focus on doing what only she can do best.

> We had a very specific goal for what our practice would look like, which was that people that walk in are going to be our family, and not just a number. So OrthoFi plays a huge part in that.
>
> **Michelle Heitland,** Treatment Coordinator & Office Manager

THE PARTNERSHIP

Giving Every Patient a White-Glove Experience from Day One

LevelUp partnered with OrthoFi to handle the insurance and finance side of the operations, giving Michelle the time and tools to build an even better patient experience.

Now patients complete OrthoFi's digital intake forms at home, including a soft credit check that sorts them into a payment tier, and insurance is verified ahead of their exam. The team uses OrthoFi's cheat sheet to prepare for every consult, and they hand patients the payment slider directly so they can choose their own down payment and find a monthly payment they can afford.

All this has allowed the team to provide a personalized service that shows patients that they've come to the right place. As Dr. Gage explains, "we create trust from day one, from the consult, from the paperwork, from all our communication, so that when they come in...it's more like a living room and not so much like a clinical sterile exam room, they feel at home, they feel safe, they feel like they can get their concerns out and be listened to."

1. **Digital intake at home**
   Forms completed before the visit.
   93% done pre-visit
2. **Soft credit check**
   Patients sorted into a payment tier automatically.
3. **Insurance verified**
   Benefits confirmed ahead of the exam.
4. **Consult + payment slider**
   Team preps with the cheat sheet; patient picks their own plan.

THE RESULTS

Shifting to Offense to Build a Healthy, Growing Practice

LevelUp now converts 90% of patients on a rolling 12-month basis, with 42% starting treatment the same day. That gap is intentional. Rather than pushing for same-day starts, Dr. Gage and Michelle ask patients directly when they want to start and follow up on that exact date, an approach that converts roughly 90% of the time.

Starts are up 26%, total production is up nearly 30%, and net production per start has climbed 32%, from about $4,300 to about $5,700. On top of this, OrthoFi's in-network fee optimization has added more than $51,000 in annual revenue, money they were previously leaving on the table without realizing it.



Michelle and Dr. Gage meet monthly with their OrthoFi Success Manager to review roughly 15 KPIs and benchmark their performance against practices across the country. This data and strategic guidance have given them the confidence to increase their fee schedules and adjust their billing options.

While he was hesitant to trust the data at first, Dr. Gage shares, "what ended up happening when we used the slider is people were choosing higher down payments than we even were recommending sometimes."

After lowering the practice's minimum down payment from $500 (braces) and $1,000 (aligners) to $250 across the board, average down payments held steady, but patients who couldn't previously afford to start were now able to begin treatment. Delinquency has stayed near zero throughout, and the practice's growth is increasingly driven by internal referrals rather than outside marketing.

> **We've asked, 'Could we hire someone to do the same thing that OrthoFi does for the amount that we've paid?' And every year we've said no.**



Dr. Colby Gage
Founder, LevelUp Orthodontics

KEY RESULTS

~$1,300 Average same-day cash per case	**~22%** Of patients pay in full	**~$834** Average down payment	**~21 mo** Average plan length (slider allows 35)
95% Kept new-patient exam rate	**93%** Of patients complete paperwork at home	**42%** Start treatment same day	**$51k+** Annual revenue from in-network fee optimization

OrthoFi works like an additional employee **who never clocks out**, so LevelUp's team can stay on offense, providing an experience that makes patients want to tell their friends.

See how OrthoFi can support your business.

BOOK A FREE CONSULTATION

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