

Billing and AR – Practice Session

Note: *Keep in mind, the data is to be entered in your live database. Reminders to consult with an admin are included within the practice session wherever applicable. After the exercises have been completed, please refer to the **End of Practice Session checklist** to ensure practice data is separated or removed from your live database.*

This session is best for one trainee. If multiple trainees require practice, have each trainee replace the names and other personal information in the exercises using their favorite rock star/actor/sports star.

PATIENT INSURANCE ENTRY

Create New Household

Frederic Anderson: Male Birthdate: June 21, 1964 Preferred Name: Fred Primary Guarantor
 Sarah Anderson: Female Birthdate: July 21, 1966 Primary Contact
 Taylor Anderson: Female Birthdate: September 19, 1998
 Address: 3113 Pooz Street, New Brunswick, NJ 08901
 H: 732-227-9469
 Plan/Employer: Solution Realty
 Insurance: Subscriber: Fred Subscriber ID: 11119
 Dependents: Sarah and Taylor
 Carrier: Everest
 Group: 556991
 Claim Mailing Address: 2145 Alexander Drive, Carrollton, NJ 75006
 Renewal Month: July Type: Medical Fee Schedule: your clinic fee schedule
 Coverage Type: Insurance Coverage %
 Standard Coverage table
 Preventative 90% Basic 90% Major 50% Ortho 50%
 Implant services and implants not covered (D6190-D6199)
 Fluoride (D1208 and D1206) covered until 18 years old only
 Accept Assignment and Release of Information
 Deductible: None
 Benefit: Individual: \$2,500 Family: \$10,000 Ortho: \$1,000

Add Secondary Policy

Taylor Anderson: Subscriber: Taylor Subscriber ID: 500000003
 Plan/School: Barnard College
 Insurance: Carrier: United Health Care Insurance of NY
 Group: 90500
 Claim Mailing Address: PO Box 5240,
 Kingston, NY 12402-5240
 Phone: 877-842-3210
 Renewal Month: September
 Type: Dental
 Fee Schedule: your clinic fees
 Coverage Type: Insurance Coverage %
 Standard Coverage table
 Update D7000-D7999 Deductible Type to Major
 Basic and Preventative 100% no Major and no Ortho
 Update D2700-D2999 to 30% coverage
 Subscriber ID: 500000003

FROM THE LEDGER

1. Set the Ledger View to patient view and Sort by date

For Fred Anderson:

2. From the ledger, add Completed procedures:
 - a. D0150 – Comprehensive Evaluation
 - b. D4346 – Scaling in presence of generalized gingival inflammation, full mouth
 - c. D1110 – Prophylaxis Adult
 - d. D1208 – Topical Application of Fluoride
3. Add a discount of \$50 for today's visit.
 - a. Add an adjustment note indicating discount is for referring a patient.
4. Enter a Visa payment for the total patient portion remaining.
5. Prophy was posted incorrectly, it was not done today. Delete the procedure.
6. Using Credit Card Refund, refund the prophy amount to the patient.
 - a. Add adjustment tag "Visa".
Note: *Please consult with admin before creating a new tag.*
 - b. Add an adjustment note indicating what happened.

Tip: *Provider for adjustment should default to the patient's Primary Provider. Go back and correct the provider for the refund if necessary.*

For Taylor Anderson:

7. From the ledger, add Tx Plan procedures for tooth 3:
 - a. D2740 – Full Porcelain Crown
 - b. D2954 – Prefabricated Post & Core
8. Create and Submit a Pre-authorization with an attached image for the above procedures.
Note: *You will not have any documents or images to attach. This exercise is meant to show you how to include additional attachments to a claim.*
9. Book Taylor an appointment for today using the New Patient Exam multi-code.

For Sarah Anderson:

10. From the ledger, add Completed procedures:
 - a. Tooth 8 MIF D2332 – Anterior Resin Composite 3s
 - b. Tooth 9 MIF D2332 – Anterior Resin Composite 3s
11. Modify both 8 and 9 to include the Lingual surface.
 - a. Update the procedure code.
 - b. Update the fee, if necessary.
12. Check the Guarantor portion and enter a Check Payment for tooth 8 only.
13. The patient check was denied by the bank.
 - a. Enter an NSF Check adjustment.
 - a. Add an adjustment note indicating what happened.
 - b. Add an NSF Bank Fee of \$25.
 - a. Add an adjustment note "\$10 bank fee, \$15 office fee".
 - c. Add a Guarantor Note "Guarantor agreed to pay NSF Fee next visit".

FROM THE APPOINTMENT PANEL

Using Taylor's Appointment:

14. Change appointment status to Here.
15. Collect patient pre-payment of \$50 cash.
16. Add payment tag "prepayment".
17. Add payment note "to be applied for today's procedures only".
18. Change appointment status to Ready.
19. Student has finished with the appointment, change the appointment card status to Checkout.
20. If user role permits – Complete procedures associated with today's appointment.
Otherwise, Request Approval to complete procedures.
21. Go to patient ledger

Tip: *If the procedures are not visible in the ledger, refresh the screen.*

- a. Add Completed Procedure D7881 – Occlusal orthotic device adjustment
- b. Apply pre-payment.
- c. Complete Patient Walkout
 - i. Create Claims for both Taylor and Fred's procedures for today.
 - ii. Split the Occlusal orthotic adjustment from the rest of the procedures.
 - iii. Send the claim containing the hygiene procedures.
 - iv. Print the claim containing the orthotic adjustment.
 - v. Collect remaining patient portion if any.
 - vi. Print a Walkout Statement for Taylor

Tip: *Use Patient view*

22. Complete all Appointment Tasks.
23. Change appointment status to Complete.

Continue with Taylor:

24. Book another appointment for today with the Tx Plan for tooth 3 attached to the appointment.
Tip: *Case status must be Approved before it can be associated with an appointment.*
25. Move the appointment card to Checkout.
26. If user role permits – Complete both procedures.
Otherwise, Request Approval to complete procedures.
27. Create and Submit the claim to the Primary Insurance.
28. View the Guarantor Portion breakdown in Detailed View.
29. Enter the full primary insurance portion as an Insurance Payment.
Note: *For practice purposes only, insurance payment is usually received a few days after claim submission.*
30. Open the Secondary Claim and Submit to the Secondary Insurance.
31. Change Ledger View to Guarantor View and Sort by statement.
32. Create a Payment Plan for all household member procedures.
33. Print the Payment Plan.
34. Print a Billing Statement for the Guarantor
 - a. From last zero balance
 - b. Guarantor view by statement
 - c. Add to Patient Connection

Tip: *Use the Patient dropdown > Billing Statement*

FOR THE ENTIRE CLINIC

35. Generate Billing Statements for the clinic.
36. Create Claim for all outstanding procedures.
37. Send all Unsent Claims.
38. View all Sent Claims and check to see any previously rejected claims by eServices.
39. Run the Aged Receivables Report.

End of Practice Session checklist:

- Delete the claims created
- Delete adjustments, payments, and procedures entered
- Delete the patient's Recare
- Delete the fake patient appointments from the Calendar
- Remove the insurance plans from the patients
- Delete the plan from the Carrier list
(Home > Carriers > select the carrier > select the plan > Delete)
- Delete the carriers from the live database
Note: *Carriers can be re-added when a valid insurance plan is presented by a real patient.*
- Update all test patient statuses to Inactive Status
- Change patient name to indicate they are a test patient (ex. Janet Test)