

## Billing and AR – Practice Session

### Required before start of Practice Session:

- Two (2) fake patients under the same family/guarantor per trainee  
If there are no fake patients in the database, create them using your favorite rock star/actor/sports star.
- An appointment for one of the two patients scheduled on practice session date
- Scheduled appointment must have associated Tx Plan procedures

**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.*

### FROM THE APPOINTMENT PANEL

#### Patient 1:

1. Change appointment status to Here.
2. Collect patient pre-payment of \$50 cash.
3. Add payment tag “prepayment”.  
**Note:** *Please consult with admin before creating a new tag.*
4. Add payment note “to be applied for today’s procedures only”.
5. Change appointment status to Ready.
6. Pretending the student has finished with the appointment, change the appointment card status to Checkout.
7. If user role permits – Complete procedures associated with today’s appointment.  
Otherwise, Request Approval to complete procedures.
8. Go to patient ledger  
**Tip:** *If the procedures are not visible in the ledger, refresh the screen.*
  - a. Apply pre-payment.
  - b. Complete Patient Walkout
    - i. Collect remaining payment if any.
    - ii. Print Walkout Statement.
9. Complete all Appointment Tasks.
10. Change appointment status to Complete.

### FROM THE LEDGER

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

#### Patient 2:

12. 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
13. From the ledger, add Tx Plan procedures for tooth 3:
  - a. D2740 – Full Porcelain Crown
  - b. D2954 – Prefabricated Post & Core
14. Give Patient 2 a discount of \$50 for today’s visit.
  - a. Add an adjustment note indicating discount is for referring a patient.

15. Enter a Visa payment for the total patient portion amount.
16. Prophy was posted incorrectly, it was not done today. Delete the procedure.
17. 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.

**Patient 1:**

18. From the ledger, add Completed procedures:
  - a. Tooth 8            MIF            D2332 – Anterior Resin Composite 3s
  - b. Tooth 9            MIF            D2332 – Anterior Resin Composite 3s
19. Modify both 8 and 9 to include the Lingual surface.
  - a. Update the procedure code.
  - b. Update the fee, if necessary.
20. Enter a Check Payment for the total fee for tooth 8.
21. 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".

**Patient 2:**

22. If user role permits – Complete both procedures entered as Tx Plan from earlier for tooth 3  
 Otherwise, Request Approval to complete procedures.  

**Tip:** Tx Plan can be completed from Progress Notes if not attached to a Case or an appointment.
23. Change Ledger View to Guarantor View and Sort by statement.
24. Create a Payment Plan including all fees from Patient 1 and Patient 2 procedures.
25. Print the Payment Plan.
  
26. Print a Billing Statement for the Guarantor
  - a. From last zero balance
  - b. Guarantor view by statement
  - c. Add to Patient Connection
27. Generate Billing Statements for the entire clinic.
28. Run the Aged Receivables Report.

**End of Practice Session checklist:**

- Delete the adjustments, payments, and procedures entered
- Delete the patient's Recare – if added
- Delete the appointments from the Calendar
- Update test patient status to Inactive Status
- Change patient name to indicate they are a test patient (ex. Janet Test)