Initial Training Workbook

Sensei Cloud

Your Guide to a Successful Transition

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CM300-01

Sensei Cloud

Initial Training Workbook

Notice

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Contents

Introduction

This workbook includes the following lessons. To access a lesson, click the link:

- Adding Patients
- Scheduling Patients
- Checking Patients In and Out
- Working with Insurance
- Working with Charges and Payments

Accessing the Shared Trial Sensei Cloud Database

We at Carestream Dental want your transition to our premier practice management system to go smoothly, and we believe that every opportunity that you have to learn can help you with this transition. During your training, and while your data is undergoing conversion to Sensei Cloud, we want you to be able to try the software so that you are prepared for your first live day. For this reason, we provide you access to a **SHARED TRIAL** Sensei Cloud database where you can practice what you learn and can complete the skill sharpeners outlined in this workbook.

To access Sensei Cloud and this **SHARED TRIAL** database:

1 Navigate to the website: **https://gosensei.us**.

2 Enter the following login information:

Email: **SenseiCloud@outlook.com**
Password: **$enseiC!**

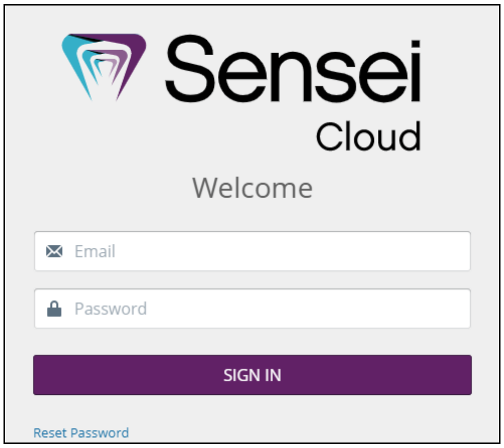
Disclaimer: Carestream Dental provides access to this Sensei Cloud **SHARED TRIAL** database for the purpose of learning. Please be aware that much of the data that exists in this database has been added directly by other clients and should not be used for any purpose other than testing the program. Since you and other clients will have access to any information you enter, **DO NOT USE ANY PERSONAL IDENTIFIABLE INFORMATION OR PATIENT HEALTH INFORMATION**; Use Only Fictitious or Made Up Information to Protect the Privacy of Patients, Staff, and Others. Fictitious data includes any identifiers, including but not limited to, patient/staff names, addresses, phone numbers, social security numbers, and images.

Note: This **SHARED TRIAL** database will be recreated periodically without warning, and all existing records will be overwritten and no longer retrievable. The **SHARED TRIAL** database should not be used to store any real or important medical data. Further, Carestream Dental is not liable for any loss **or unauthorized use** of data that occurs from this database.

Accessing the Software

To log in to the Sensei Cloud system:

1 Click **https://gosensei.us**. The **Sensei Cloud Welcome** window is displayed.



2 In the **Email** field, type your email address.

3 In the **Password** field, type your password.

Note: If you have not set a password or have forgotten your password, click the **Reset Password** link.

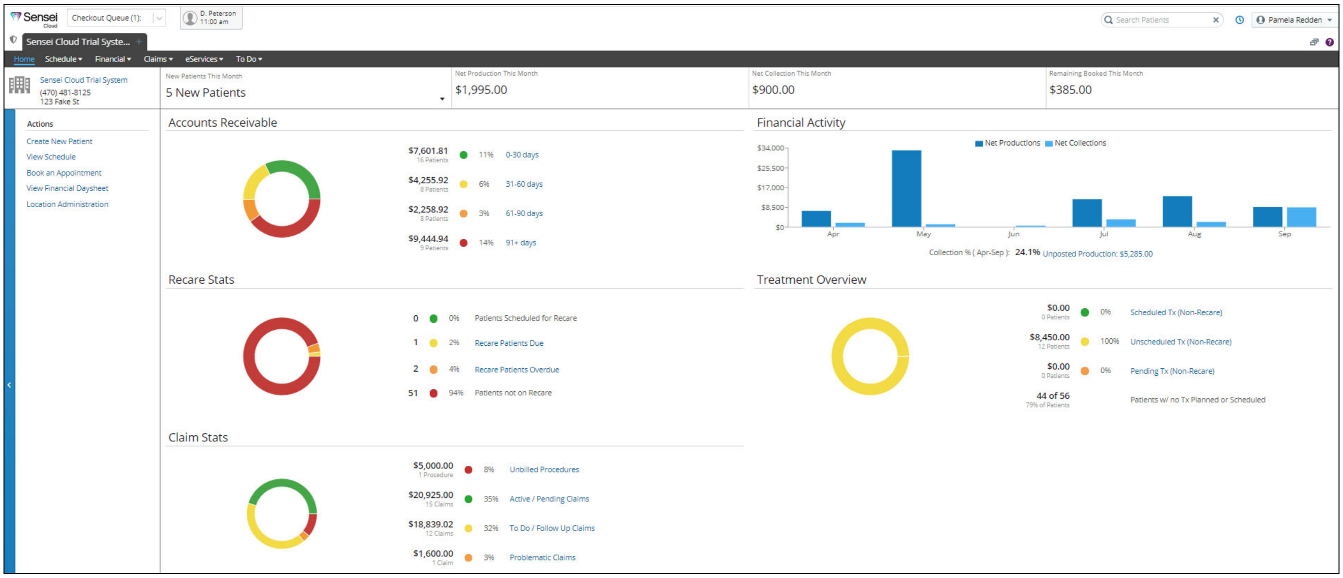
4 Click **SIGN IN.**

5 If your office has more than one database, the **Database** window is displayed. Select the one you want to use and click **Get Started.**

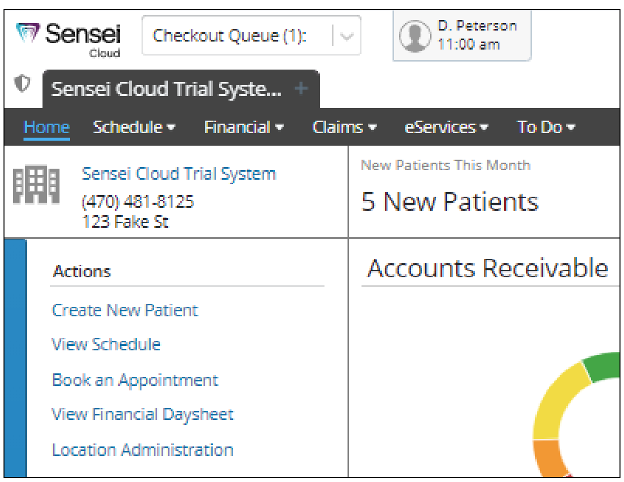
To exit the software, click the **X** in the upper-right corner of any window.

Using the Main Window

When you log in to the software, you see the **Sensei Cloud** main window, with the **Location** tab on the upper-left side of the screen and the **Search Patients** and **User** fields on the upper-right.



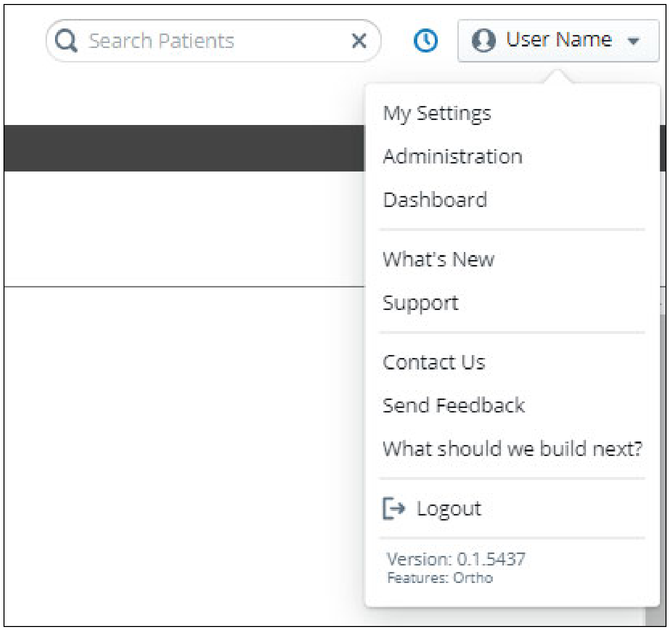
Left Side of the Window



The following fields, tabs, and icons are found on the left side of the window:

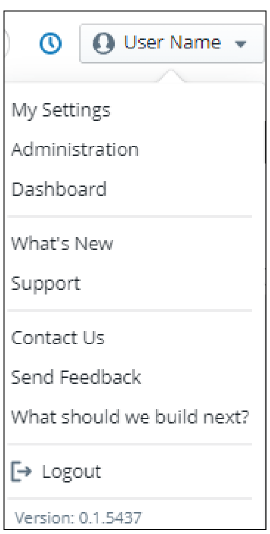
- **Queue** field–Click to display the **Waiting Queue** or the **Checkout Queue**.
- **HIPAA** icon –Click to enable or disable Privacy Mode.
- **Location** tab–Displays the practice name, with the practice phone number and address below it, under the menu bar. Click **+** on the **Location** tab to display other offices in the practice.
- **Menu** bar–Displays options you can click. These options vary depending on the tab you have open.
- **Actions** section–Displays options you can click. These options vary depending on the tab you have open.

Right Side of the Window



The following fields and icons are found on the right side of the window:

- **Search Patients** field–Enter identifying information, such as a patient's name, date of birth, address, or phone number. Click the patient's name to see a snapshot with additional information; click next to the name to select the patient.
- **Clock** icon–Click to clock in or clock out. This field is displayed only for hourly employees.
- **User** field–Displays your name. Click the name and a list is displayed:



  - **My Settings**–Displays information about the staff member and a list of all staff members. You can create and edit staff member information.
  - **Administration**–Displays information about the practice, if you have user permission. From the **Administration** tab, you can set up most of the functions of the practice.

  - **Dashboard**–Gives you a quick look at the practice statistics, if you have user permission. From the **Dashboard** tab, you can run reports.
  - **What's New**–Provides release notes on the Carestream Dental Exchange.
  - **Support**–Enables you to search online help and opens a live chat dialogue box so you can speak directly to a Support representative during regular business hours.
  - **Contact Us**–Provides a way for you to send a message to Carestream Dental and give general feedback, report a bug, or request support.
  - **Send Feedback**–Provides another way for you to send a message to Carestream Dental and give general feedback, report a bug, or request support.
  - **What should we build next?**–Provides a way for you to send your suggestions and ideas to Carestream Dental.
  - **Logout**–Logs you out of the software.

- **Tab List** icon –Enables you to see a list of open tabs, close all patient tabs, or close all open tabs.
- **?** icon–Enables you to search online help and opens a live chat dialogue box so you can speak directly to a Support representative during regular business hours.

Tip: Within each area of Sensei Cloud, some of the displayed information is also a link. Hover the cursor over an item; if it changes from an arrow to a finger, you can click there for more details and options.

Related Documentation

See the *Sensei Cloud Configuration Guide* (CM100) and the Sensei Cloud Online Help for more information.

1 Adding Patients

This lesson contains the following topics:

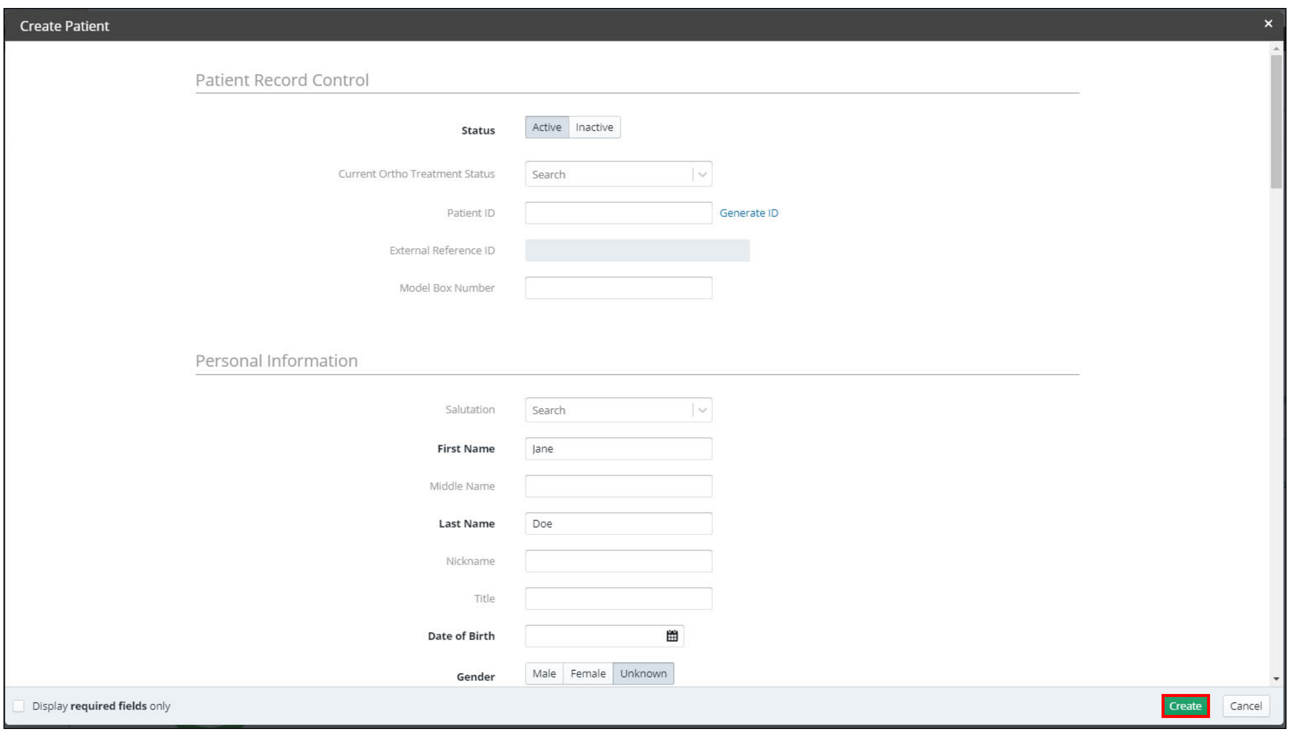
- Adding New Patients
- Editing Patient Records
- Adding Patient Portraits or Avatars

Adding New Patients

To add a new patient record:

1 In the location's **Home** view, search for the patient in the **Search Patients** field, and make sure he or she is not in the database already.

2 Under **Actions**, click **Create New Patient.** The **Create Patient** window is displayed.



3 In the **Patient Record Control** section, verify that the patient is **Active** and generate an ID.

4 Scroll down and enter the following information:

- Personal
- Contact
- Portrait

- Additional information, such as the school the patient attended
- Patient referrals
- Responsible parties
- Insurance
- Connected patients
- Patient preferences
- Recare appointments
- Medical alerts, if any

Note: Required fields are displayed in bold.

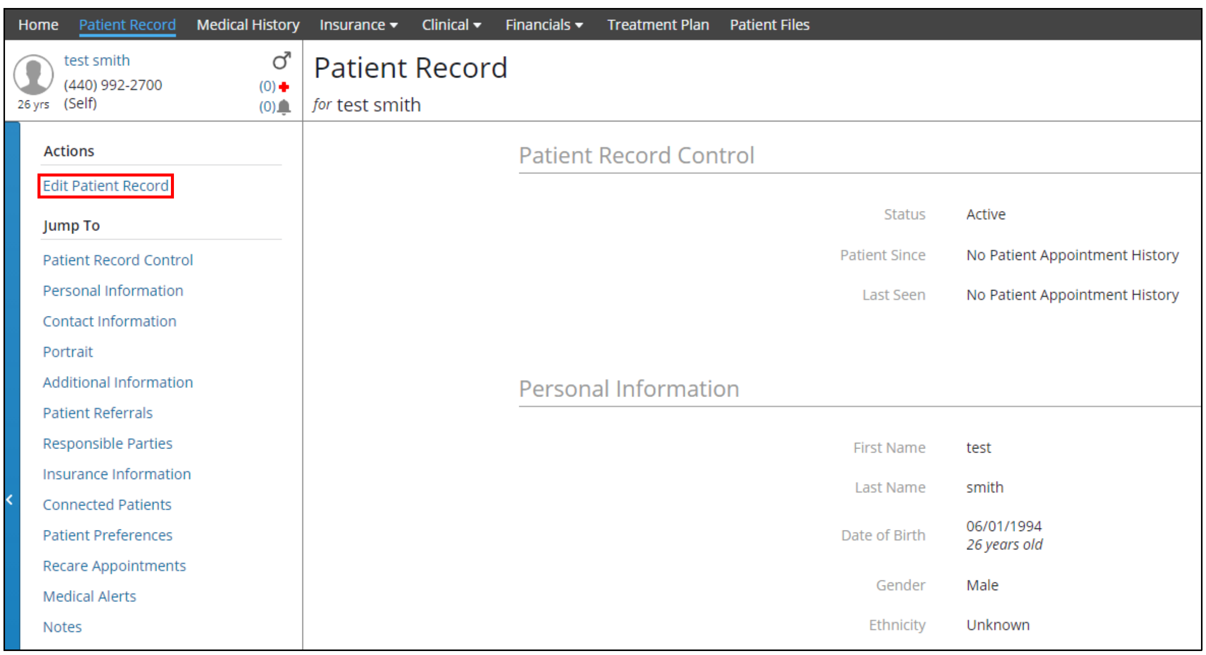
5 Add a note, if necessary.

6 Click **Create.**

Editing Patient Records

To edit a patient record:

1 In the patient's **Home** view, click the **Patient Record** tab. The **Patient Record for** window is displayed.



2 Under **Actions**, click **Edit Patient Record.**

3 Under **Jump To**, select the information you want to edit, **OR** use the scrollbar to find the information you want to edit.

4 Edit the record.

5 Click **Save Patient.**

Note: You cannot delete a patient record, but you can mark it **Inactive** in the **Patient Record Control** section. To move the record to the bottom of the patient list, add **ZZZ** to the beginning of the last name; for example, **ZZZTest.**

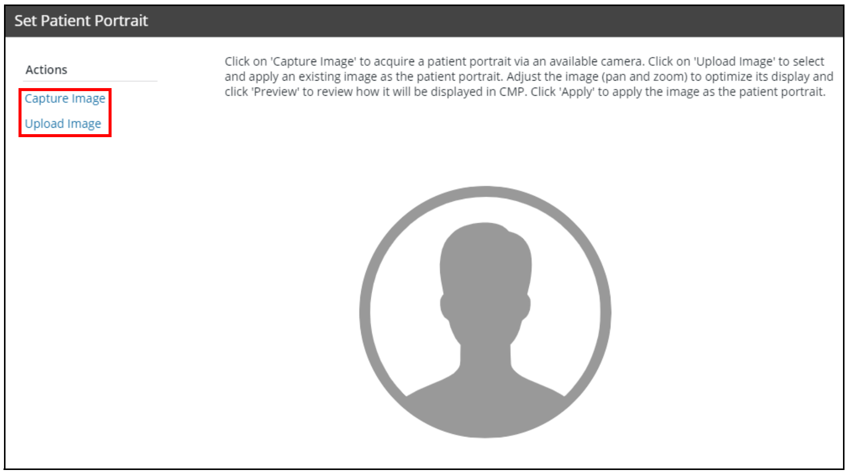
Adding Patient Portraits or Avatars

You can add a portrait or avatar as you create a new patient record or at a later date.

When You Create a Patient Record

To add a patient's portrait or avatar:

1 In the **Portrait** section, click **Add portrait.** The **Set Patient Portrait** window is displayed.



2 Click one of the following:

- **Capture Image**–When the camera is ready, click **Take Photo.**
- **Upload Image**–Select the image you want to upload and click **Open.**

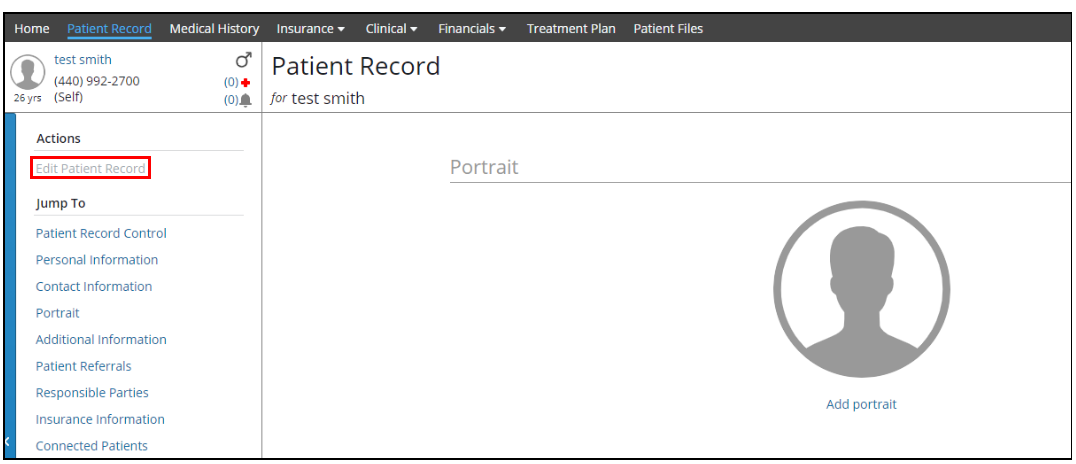
3 Use the controls to adjust the image, and then click **Preview.**

4 When you are satisfied with the image, click **Apply.**

When You Edit a Patient Record

To add a patient's portrait or avatar:

1 In the **Patient's Home** view, click the **Patient Record** tab. The **Patient Record** window is displayed.



2 Under **Actions**, click **Edit Patient Record.**

3 Under **Jump To**, click **Portrait.**

4 Under the portrait placeholder, click **Add portrait.** The **Set Patient Portrait** window is displayed.

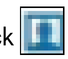
5 Under **Actions**, click one of the following:

- **Capture Image**–When the camera is ready, click **Take Photo.**
- **Upload Image**–Select the image you want to upload and click **Open.**

6 Use the controls to adjust the image, and then click **Preview.**

7 When you are satisfied with the image, click **Apply.**

8 When you have finished editing the patient record, click **Save Patient** at the bottom of the window.

Tip: To access the **Set Patient Portrait** window from a patient's mini-card, click .

Adding Notes

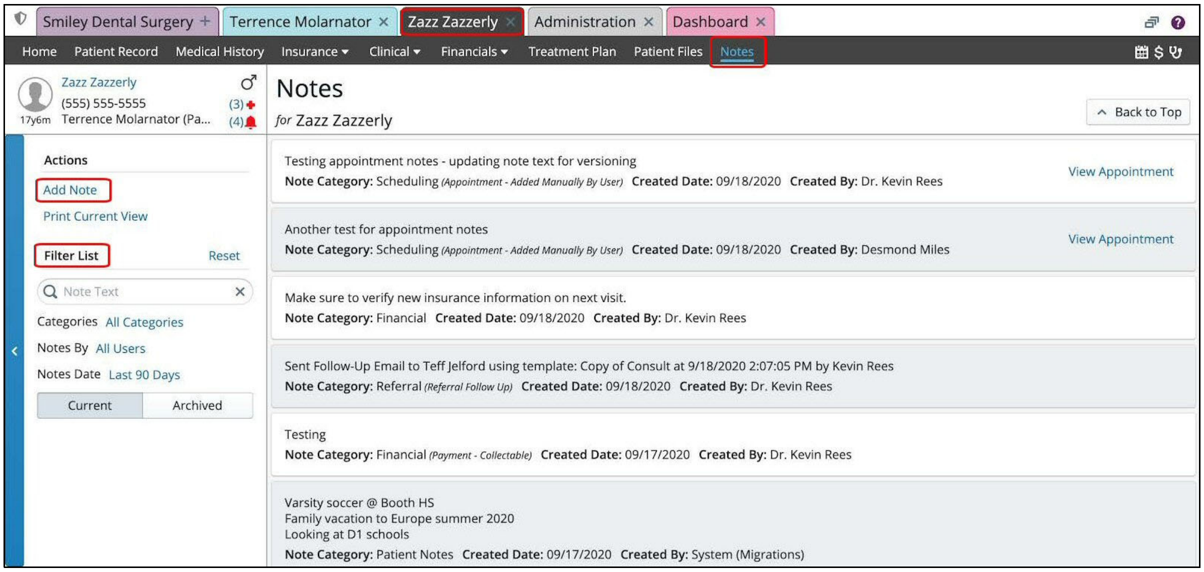
The **Notes** window lists all existing non-clinical notes that have been added to the patient account. Use this list to search for specific items by note text, or filter the list based on the note's category, author, or date. You can also print a patient's notes, generating a **.PDF** file of a patient's current notes.

The list of notes includes:

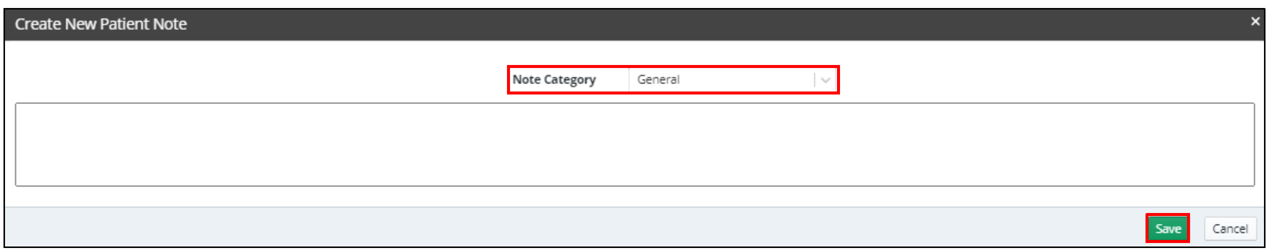
- Notes added in the **Appointment Card** when you schedule an appointment
- Notes entered when you cancel an appointment in the Day View of the Schedule
- Contact notes added when you manage appointments through a scheduled work list, such as the Pending list
- Comments added when you post a financial transaction to the Patient Ledger
- Automatic system notes created when you send correspondence to a referral source via the Referral Follow-Up list
- Automatic system notes created when you send recall reminders from the Recare list
- Text added to the **Patient Notes** field in the patient's record

To add free-text notes to a patient's record:

1 Find the patient. The patient's **Home** page is displayed.



2 Click **Add Note**. The **Create New Patient Note** window is displayed.



3 From the **Category** drop-down list, select a category:

- **General** (default)
- **Medical**
- **Financial**
- **Scheduling**
- **Referral**

4 Enter comments in the text field.

5 Click **Save**. The note appears in the **Notes** list for the patient.

Note: While you must assign a category when creating free-text notes manually, notes created from other workflow interfaces are automatically assigned a category.

Editing Notes

To edit a note, select it and click the **Pencil** icon. Notes that cannot be edited—such as system notes—display a **Lock** icon instead of a **Pencil**.

Tip: A revision history is maintained.

Skill Sharpeners

Exercise 1—A new patient by the name of John Smith calls to schedule an appointment. Add the required information and create a new patient record.

To add a new patient:

1 On the **Home** tab, in the **Search Patients** field, search for John Smith and make sure he is not in the database already.

2 Under **Actions**, click **Create New Patient**. The **Create Patient** window is displayed.

3 In the **Patient Record Control** section, make sure the patient is **Active**.

4 Ask the patient for required information on the phone and enter it in the following fields:

- **First Name**
- **Last Name**
- **Date of Birth**
- **Gender**
- **Mobile Phone Number**

5 Select the **Is Self-Responsible** option.

6 In the **Preferred Location** field, select the location from the drop-down list.

7 In the **Preferred Doctor** field, select a name from the drop-down list.

8 In the **On Recare List** field, select **Yes**.

9 Select the **Use Practice Defaults** option.

10 Click **Create Patient**.

Exercise 2—Mr. Smith arrives at his first appointment, and you want to edit his patient record to add more information.

To edit a patient record:

1 In the **Search Patients** field, enter **John Smith**. The patient's **Home** window is displayed.

2 Click the **Patient Record** tab. The **Patient Record** window is displayed.

3 Under **Actions**, click **Edit Patient Record.**

4 Click **Generate ID**.

5 Under **Jump To**, do the following:

- Click **Contact Information** and enter addresses in the email and street address fields.
- Click **Insurance Information** and then **Add Insurance Policy.** Fill in the insurance information and click **Create**.
- Click **Medical Alerts** and add **High Blood Pressure** as a medical alert.

6 Click **Save Patient**.

Exercise 3—Add and edit a note to John Smith's patient record that reads "Patient takes medication for high blood pressure."

To add and edit a note:

1. In the **Search Patients** field, enter **John Smith.** The patient's **Home** window is displayed.
2. Click the **Notes** tab. The **Note** window is displayed.
3. Under **Actions**, click **Add Note.** The **Create New Note** window is displayed.
4. From the drop-down list in the **Category** field, select **Medical.**
5. Type **Patient takes medication for blood pressure**.
6. Click **Save.**
7. Hover the cursor on the note and then click the **Pencil** icon to the far right of the window. The **Edit Existing Patient Note** window is displayed.
8. Type **high** before **blood pressure**.
9. Click **Save.**

2 Scheduling Patients

This lesson contains the following topics:

- Scheduling New Appointments
- Scheduling Treatment Plan Appointments
- Scheduling Teledentistry Appointments
- Confirming Appointments
- Rescheduling Appointments
- Cancelling Appointments
- Using the Shortcall List
- Printing the Schedule

Scheduling New Appointments

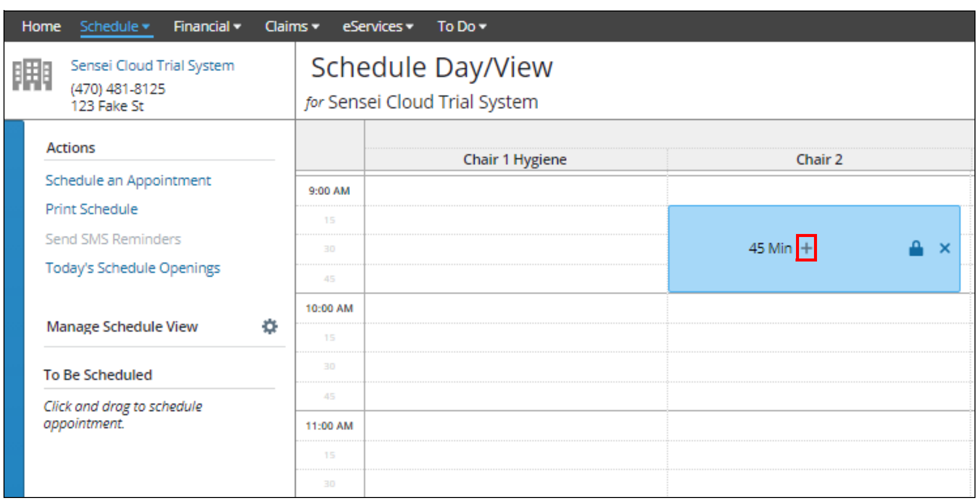
You can schedule appointments from the following locations:

- Schedule Day/View
- **Patient** tab
- Location's **Home** window
- Existing appointment

From the Schedule Day/View

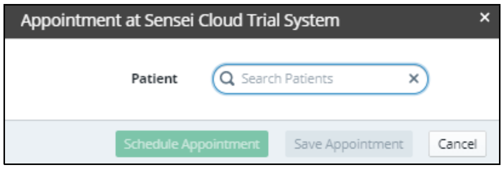
To schedule an appointment:

1 Find a date and time on the Schedule and click-and-drag the length of the appointment.

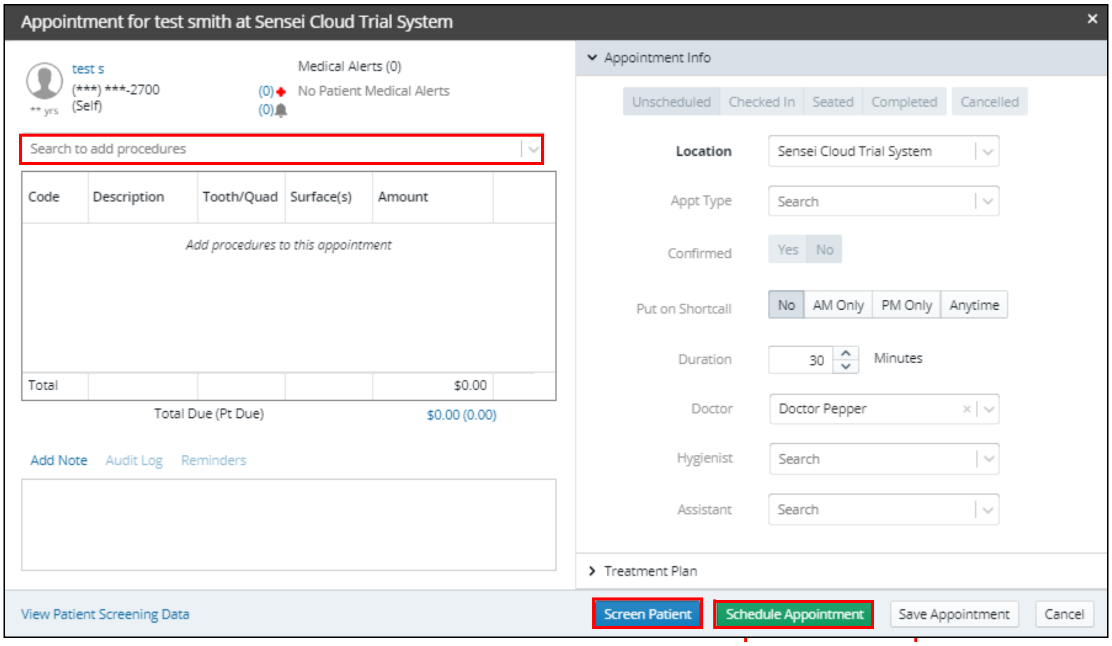


2 Click the **+** next to the duration time.

The **Search Patients** field is displayed.



3 Find and select the patient's name. The **Appointment for** window is displayed.



4 From the **Search for procedures** drop-down list, select the procedures.

5 In the **Appointment Info** section, verify or select the appropriate information in the fields.

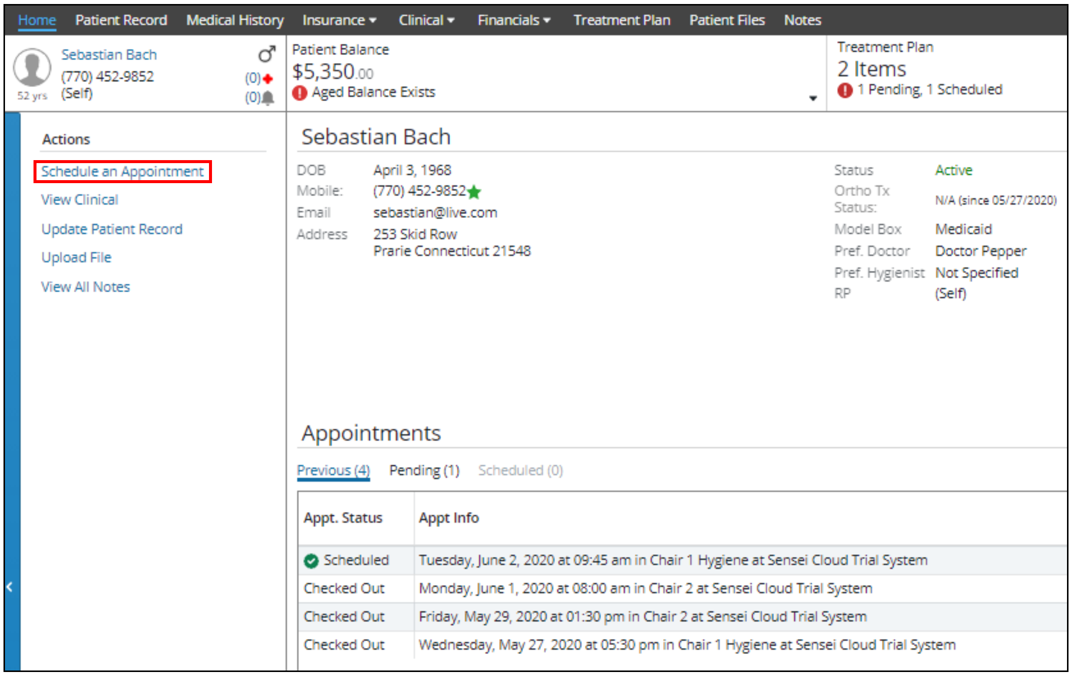
6 To screen the patient for COVID-19 symptoms, click **Screen Patient**, have the patient answer the questions, and click **Save Changes**. See “Screening Patients” for more information.

7 Click **Schedule Appointment**. The Schedule displays the appointment.

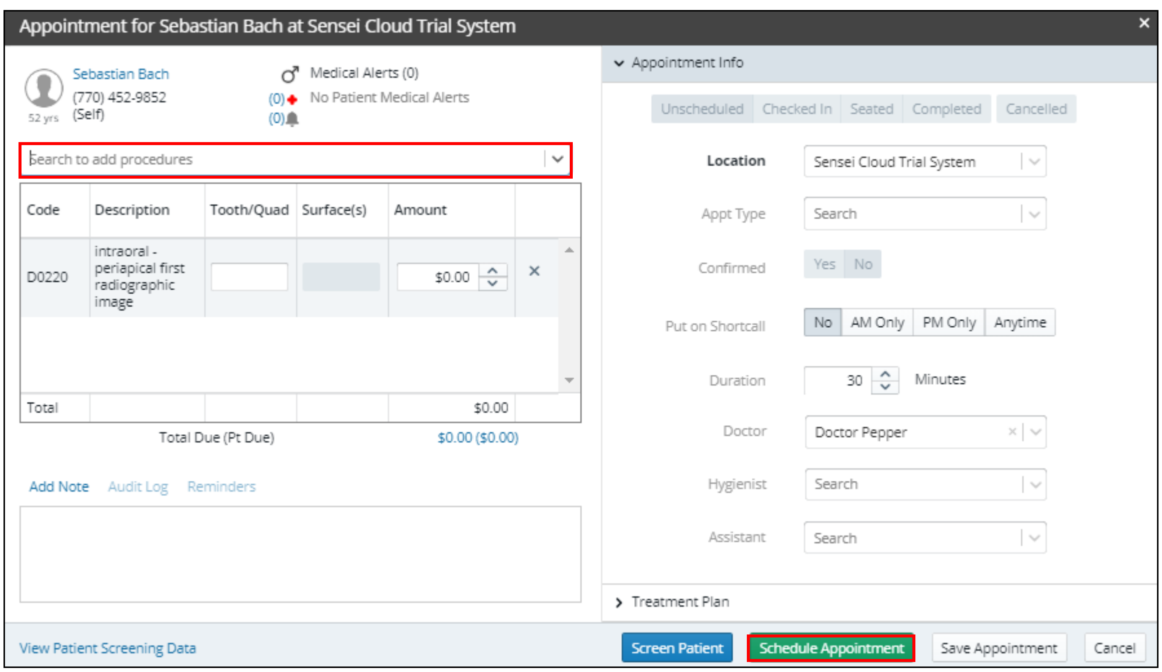
From the Patient Tab

To schedule an appointment:

1 On a patient's tab, click **Home**. The patient's **Home** window is displayed.



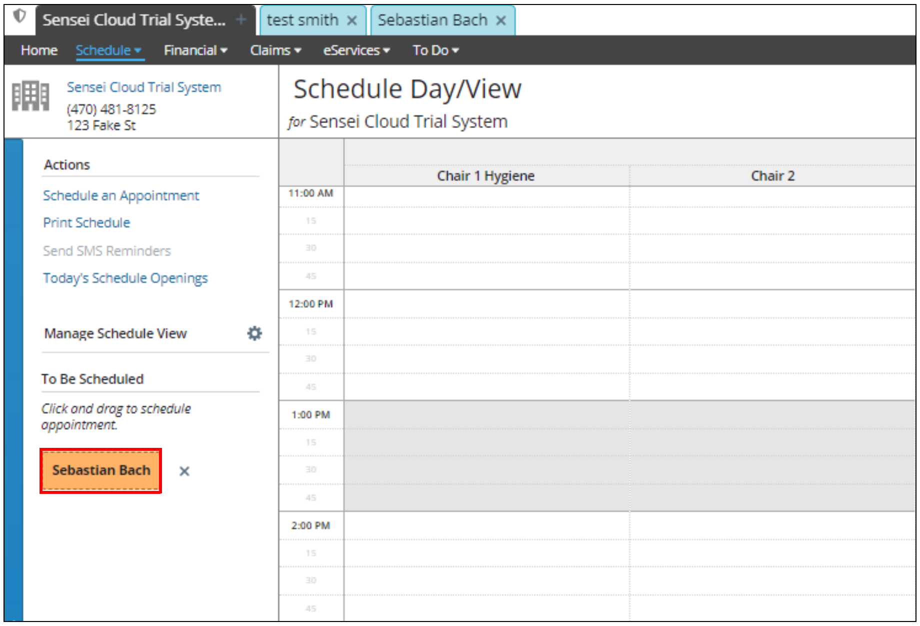
2 Under **Actions**, click **Schedule an Appointment**. The **Appointment for** window is displayed.



3 From the **Search to add procedures** drop-down list, add procedures.

4 In the **Appointment Info** section, verify or select the appropriate information in the fields.

5 Click **Schedule Appointment.** The Schedule is displayed.



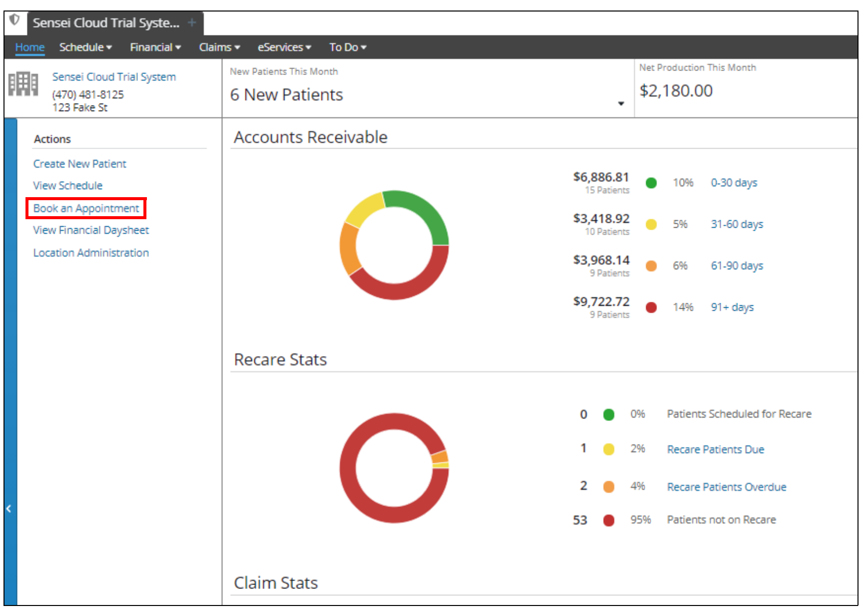
6 Find a time slot in the Schedule.

7 Click-and-drag the appointment from the left side of the window to the time slot.

From the Location's Home Window

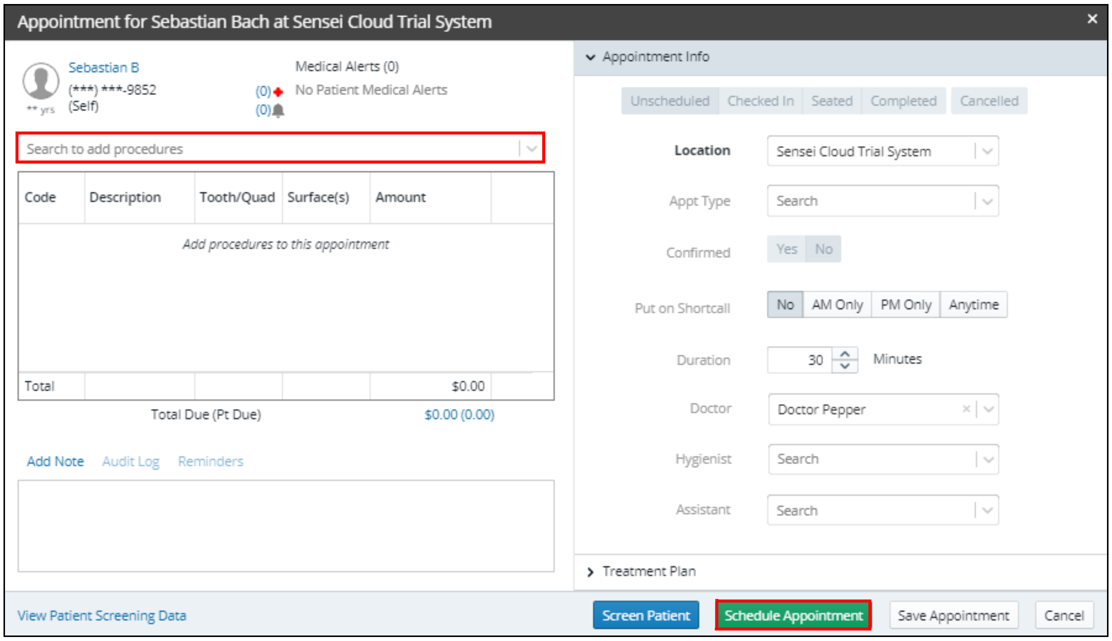
To schedule an appointment:

1 On the **Location** tab, click **Home.** The location's **Home** window is displayed.



2 Under **Actions**, click **Book an Appointment.** The **Search Patients** field is displayed.

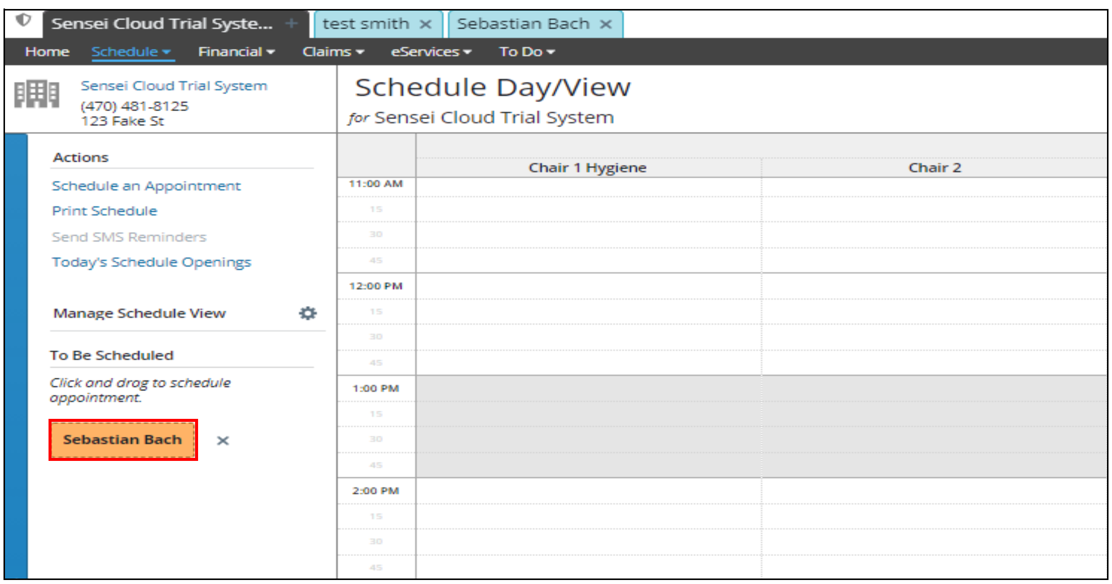
3 Find and select the patient. The **Appointment for** window is displayed.



4 From the **Search to add procedures** drop-down list, add procedures.

5 In the **Appointment Info** section, verify or select the appropriate information in the fields.

6 Click **Schedule Appointment.** The Schedule is displayed.



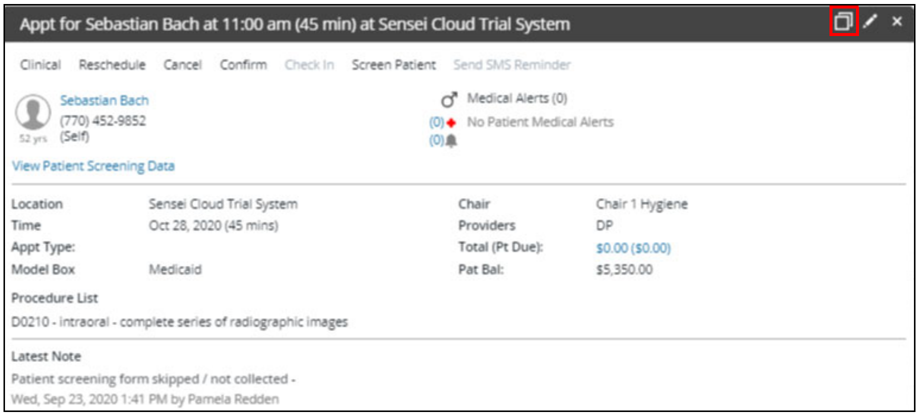
7 Find a time slot in the Schedule.

8 Click-and-drag the patient's appointment from the left side of the window to the time slot.

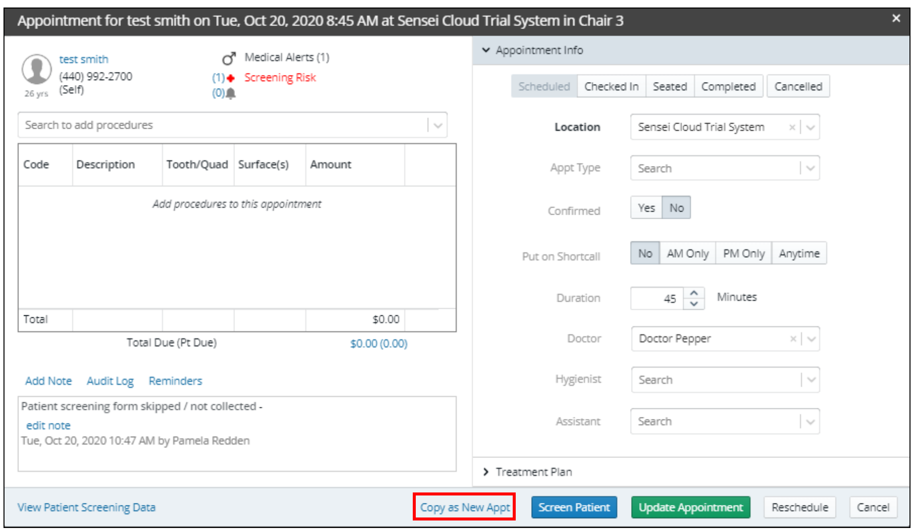
From an Existing Appointment

To schedule an appointment:

1 In the Schedule, click the appointment to display the **Appointment Details** window.



2 Click the **Copy Appointment** icon. The **Appointment for** window is displayed.



3 Modify the appointment details, as needed.

4 Click **Schedule Appointment.**

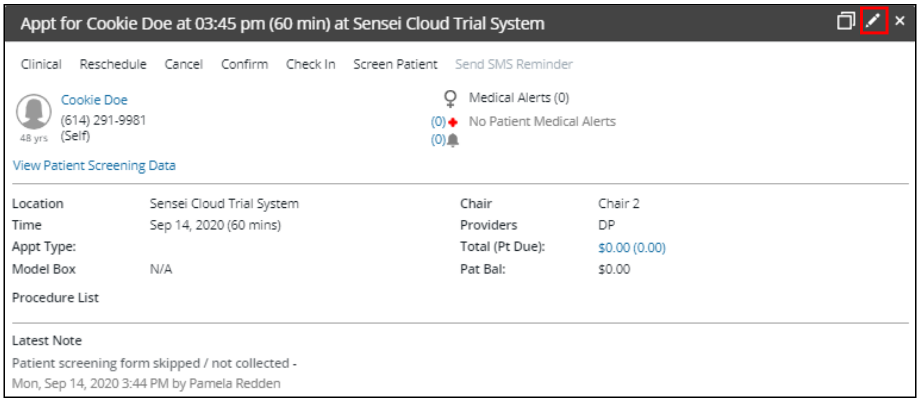
5 Find a time slot in the Schedule.

6 Click-and-drag the patient's appointment from the left side of the window to the time slot.

Editing an Appointment

To edit an appointment:

1 In the Schedule, click the appointment to display the **Appointment Details** window.



2 Click the **Pencil** icon in the upper-right corner. The appointment information is displayed.

3 Edit the following fields, as necessary:

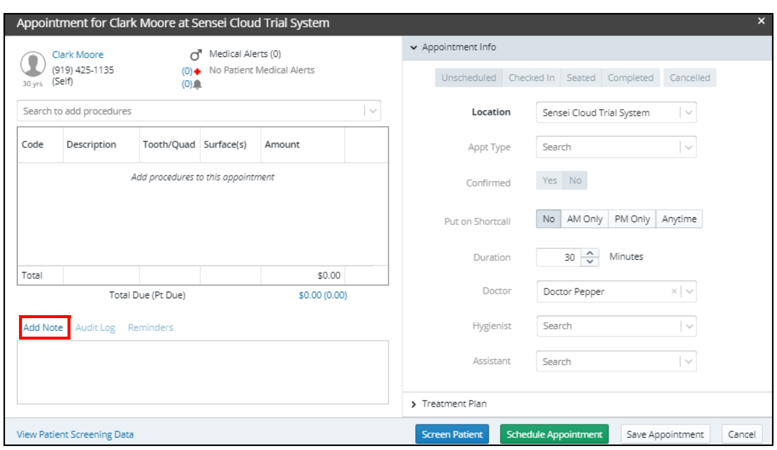
- **Appointment Status**
- **Confirmed**
- **Appointment Duration**
- **Doctor, Hygienist, Assistant**
- **Appt Type**
- **Procedures**
- **Note**
- **Treatment Plan**

4 Click **Update Appointment.**

Adding a Note to an Appointment

To add a note:

1 In the **Appointment for** window, click **Add Note.**

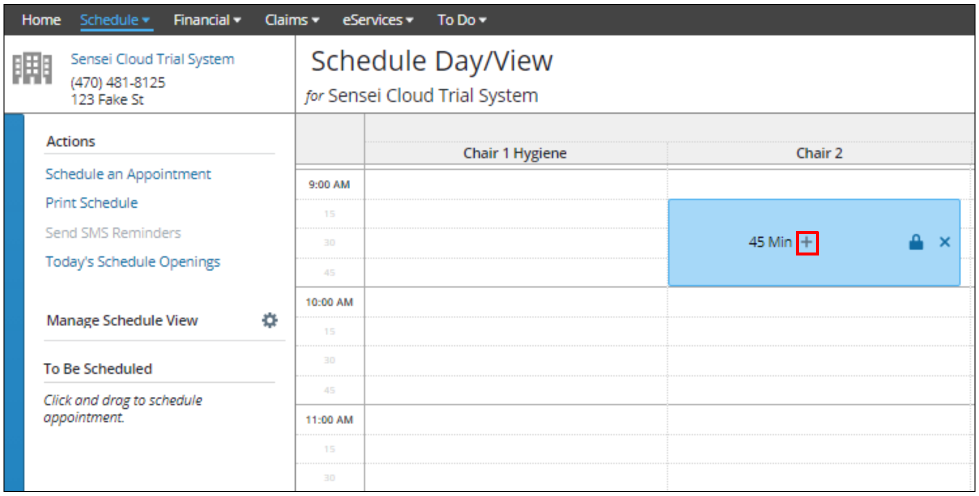


2 In the **Note** field, type the note and press **Enter.**

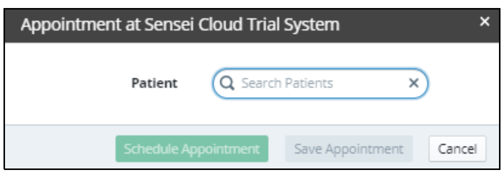
Scheduling Treatment Plan Appointments

To schedule a treatment plan appointment:

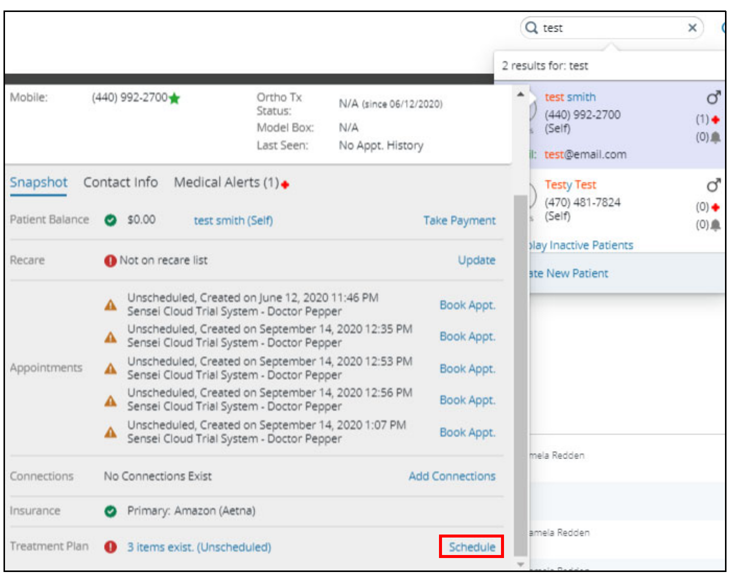
1 Find a date and time on the Schedule and click-and-drag the length of the appointment.



2 Click the **+** next to the duration time. The **Search Patients** field is displayed.

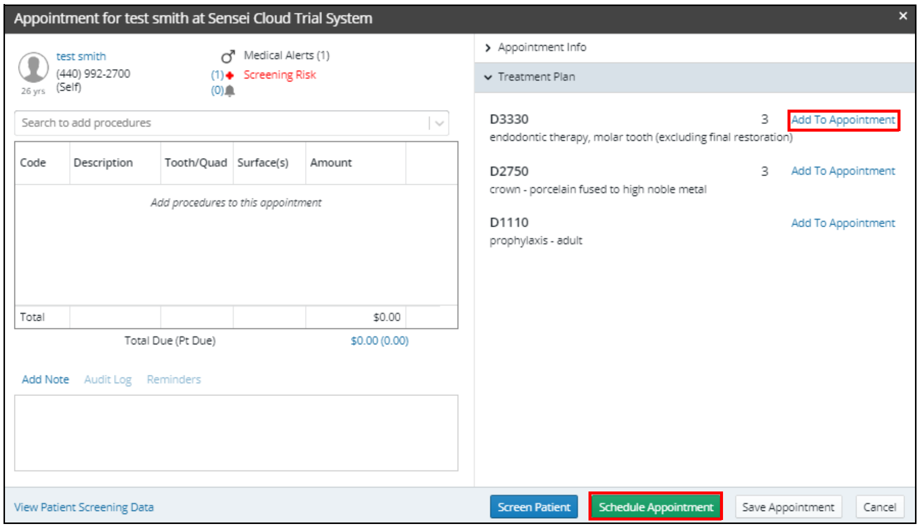


3 Find and click the patient's name. The patient's **Snapshot** is displayed.



4 Scroll down until you see **Treatment Plan** and click **Schedule.**

The **Appointment for** window shows the procedures that have been added to the treatment plan.



5 Click **Add To Appointment** next to the procedure you want to schedule.

6 Click **Schedule Appointment**. The Schedule displays the appointment.

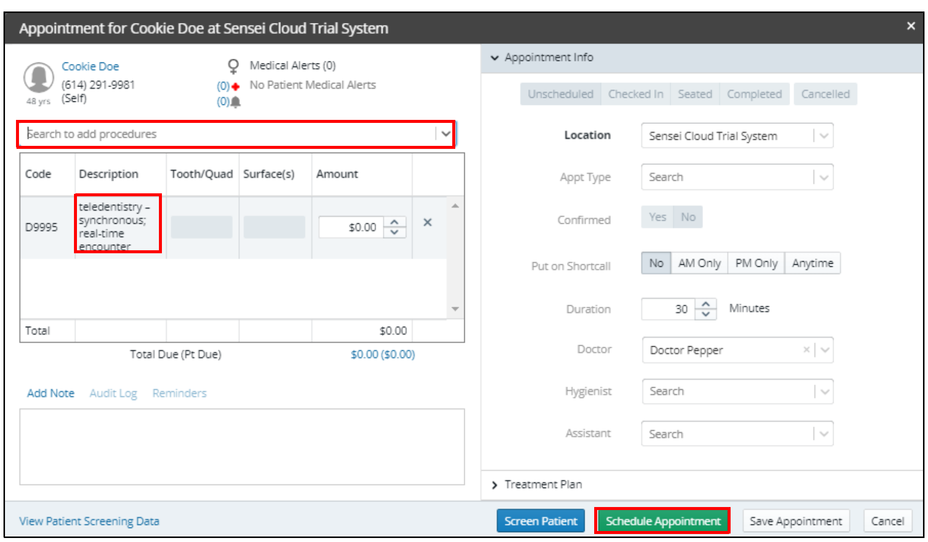
Scheduling Teledentistry Appointments

Sensei Cloud integrates with Microsoft Teams^{TM}, enabling you to schedule and launch live teledentistry consultations from your Schedule. If your practice uses Microsoft 365^{TM}, you can enroll in Carestream Dental's teledentistry solution. Once the teledentistry feature is configured, you can create online meetings as part of the appointment booking process.

When a teledentistry appointment is booked, an email is sent to the patient confirming the appointment, with a **Join Session** link. By clicking the link, the patient enters the virtual lobby for the online appointment, where you can admit them to begin the consultation.

To schedule an appointment:

1 Find the patient and begin scheduling the appointment. The **Appointment for** window is displayed.



2 From the **Search to add procedures** drop-down list, select the **Teledentistry** option.

3 Select the appropriate procedure codes and enter the appropriate information.

4 In the **Appointment Info** section, verify or enter the appropriate information.

5 Click **Schedule Appointment.** You are prompted to either log in or confirm your Office 365 account.

6 Click **Continue** and verify your credentials. The appointment is noted on the Schedule with teledentistry indicators.

Note: A confirmation email is sent to the patient with a link to the appointment.

When the appointment time arrives, the link to the **Appointment Card** is activated. Click **Start Online Meeting.** Microsoft Teams opens the meeting.

See the Sensei Cloud Online Help for more information.

Confirming Appointments

You can confirm an appointment from the **Confirmation List** and on a patient's **Appointment Details** window.

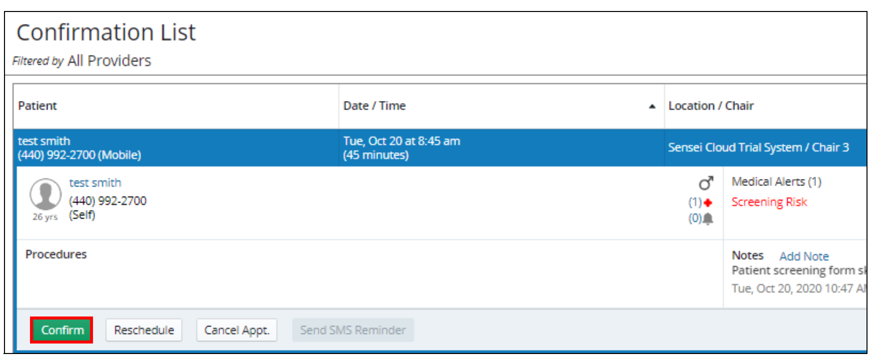
From the Confirmation List

To confirm an appointment:

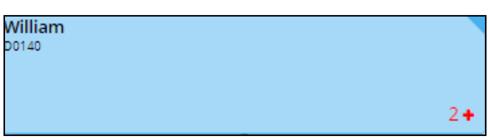
1 On the **Location** tab, select **Schedule > Confirmation List.** The appointments that need to be confirmed are displayed.

2 Use the filters on the left to choose the appointments that you want to confirm. You can filter by the provider, appointment's production value, duration, and number of days prior to appointment.

3 Select the appointment you want to confirm. Information about the appointment is displayed.



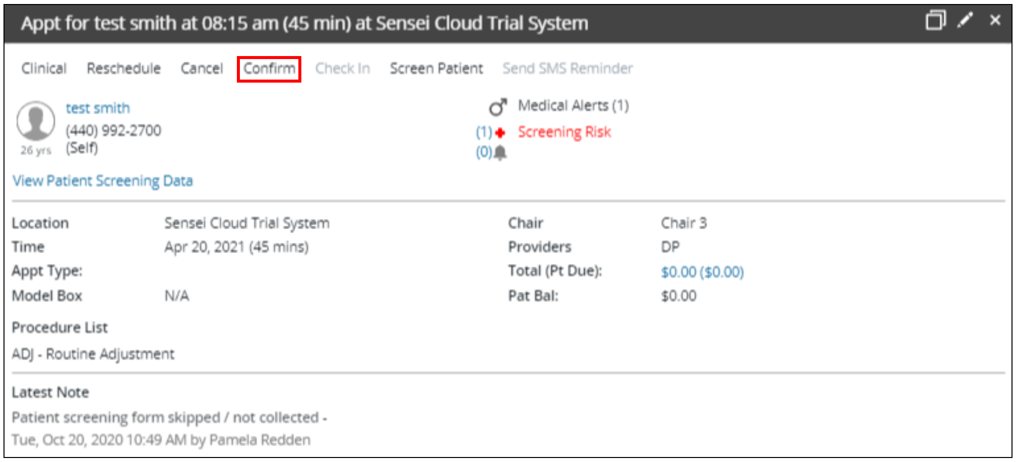
4 Click **Confirm.** Confirmed appointments are displayed on the Schedule with a dark blue triangle in the upper-right corner of the appointment.



From the Appointment Details Window

To confirm an appointment:

1 Click the appointment. The **Appointment Details** window is displayed.



2 Click **Confirm**.

3 Close the **Appointment Details** window.

Rescheduling Appointments

You can click-and-drag an appointment to another time slot on the Schedule, or you can reschedule an appointment in the **Appointment Details** window or from the **Pending List**.

Click-and-Drag an Appointment

To reschedule an appointment:

1 Click-and-drag the appointment to the **Actions** section of the Schedule. The appointment is listed under **To Be Scheduled**.

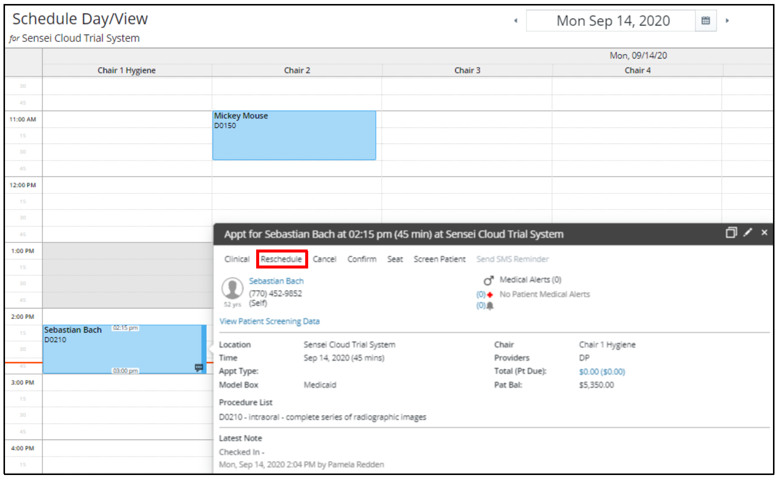
2 Find the new appointment date.

3 Click-and-drag the patient's appointment to the new time slot.

From the Appointment Details Window

To reschedule an appointment:

1 On the Schedule, click the appointment. The **Appointment Details** window is displayed.



2 Click **Reschedule.** The appointment is listed in the **To Be Scheduled** section under **Actions** in the Schedule.

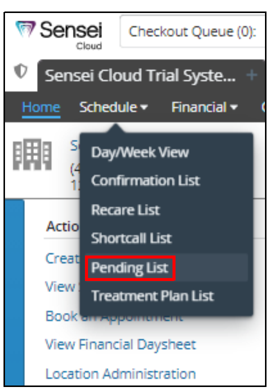
3 Find the new appointment date.

4 Click-and-drag the patient's name to the new time slot.

From the Pending List

To reschedule an appointment:

1 In the location's **Home** window, click **Schedule.** A list is displayed.

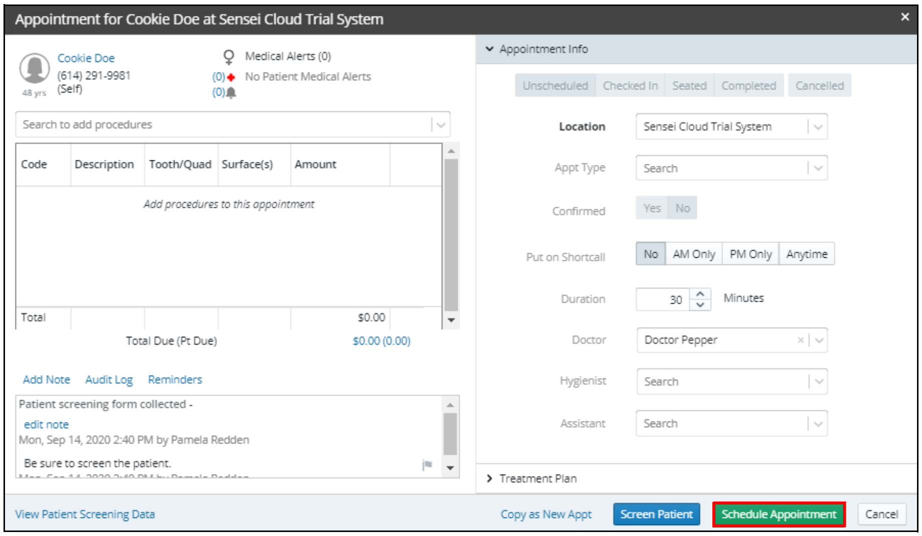


2 Select **Pending List**. The **Appointment Pending List** is displayed.

Note: You can apply filters, if necessary, to locate the appointment you are rescheduling.

3 Click the pending appointment. The appointment information is displayed.

4 Click **Reschedule.** The **Appointment Card for** the patient is displayed.



5 Click **Schedule Appointment.** The Schedule is displayed.

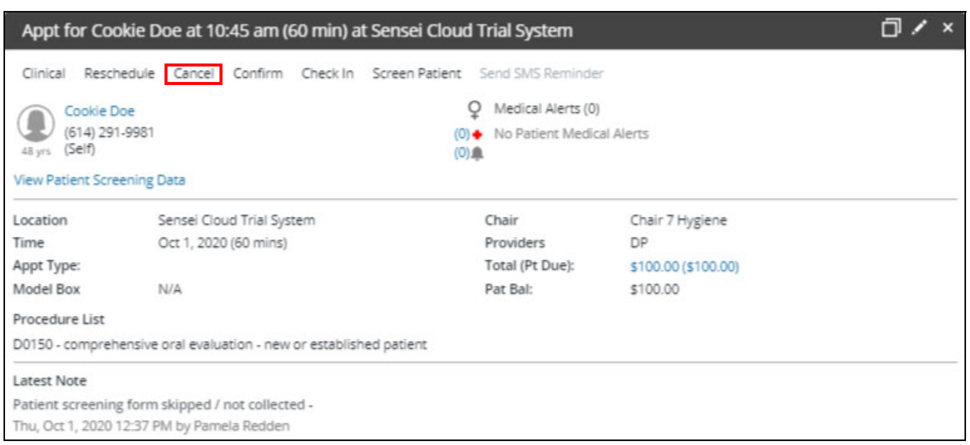
6 Find the new appointment date.

7 Click-and-drag the patient's appointment from the **To Be Scheduled** section to the new time slot.

Cancelling Appointments

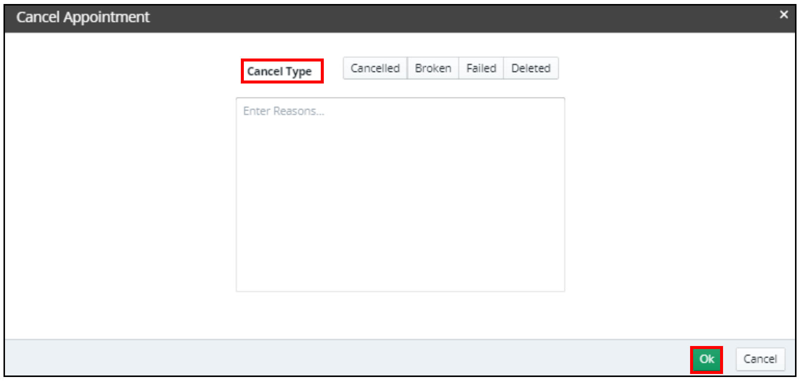
To cancel an appointment:

1 Click the appointment. The **Appointment Details** window is displayed.



2 Click **Cancel.**

The **Cancel Appointment** window is displayed.



3 Select from the **Cancel Type** list:

- **Cancelled**–Appointment is cancelled more than 24 hours before the appointment date.
- **Broken**–Appointment is broken less than 24 hours before the appointment date.
- **Failed**–Patient failed to show up for the appointment.
- **Delete**–Appointment is removed from the Schedule.

Note: Cancelled, broken, and failed appointments are placed on the Pending List.

4 In the **Reason** field, type the reason for the cancellation.

5 Click **OK**.

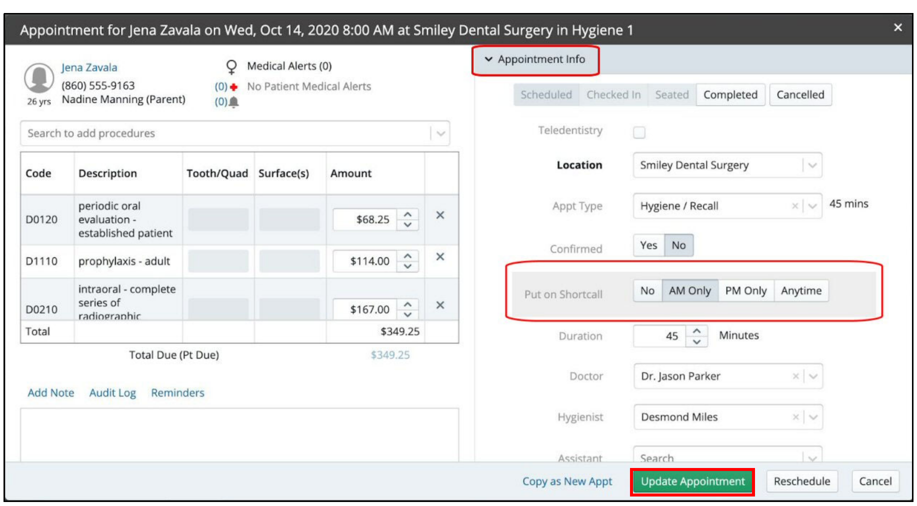
Using the Shortcall List

The Shortcall list enables you to rebook scheduled appointments for an earlier date and time. Use this list to fill a cancellation or open slot in your schedule. To view the list, on the **Location** tab, select **Schedule > Shortcall List**.

Adding an Appointment

To add an appointment to the Shortcall list:

1 On the **Appointment Card**, expand the **Appointment Info** section.



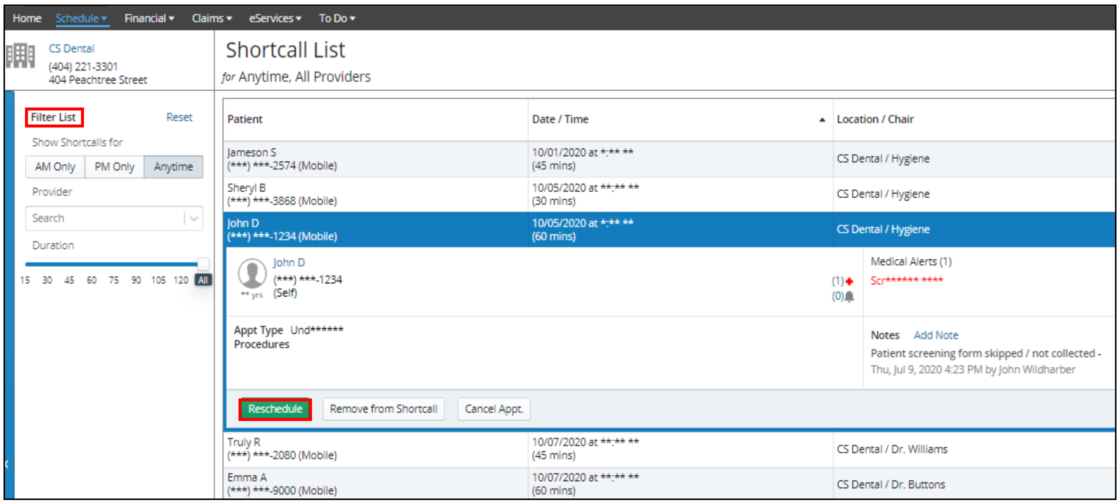
2 In the **Put on Shortcall** field, select **AM Only**, **PM Only**, or **Anytime.**

3 Click **Update Appointment.**

Rescheduling an Appointment on the Shortcall List

To reschedule an appointment:

1 On the **Location** tab, select **Schedule > Shortcall List.** The **Shortcall List** window is displayed.



2 Use the filters to narrow the list, if needed, for time of day, provider, or duration.

3 Select the appointment in the list. The details are displayed.

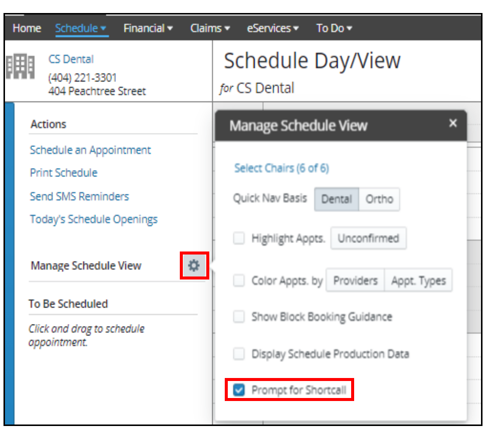
4 Click **Reschedule.** The **Appointment Card** is displayed, where you can review or update details of the appointment and reschedule it.

Accessing Shortcall Appointments From the Schedule

You can configure the Schedule to prompt you to book an appointment from the Shortcall list when you cancel an appointment.

To access Shortcall appointments:

1 Select **Schedule > Day/Week View.**



2 Click the **Manage Schedule View Control** icon. The **Manage Schedule View** settings are displayed.

3 Select the **Prompt for Shortcall** option.

Removing Appointments From the Shortcall List

The Shortcall list automatically purges appointments that occur as scheduled.

To manually remove them:

- Select **Remove from Shortcall** or **Cancel Appt.** from the details in the Shortcall list.

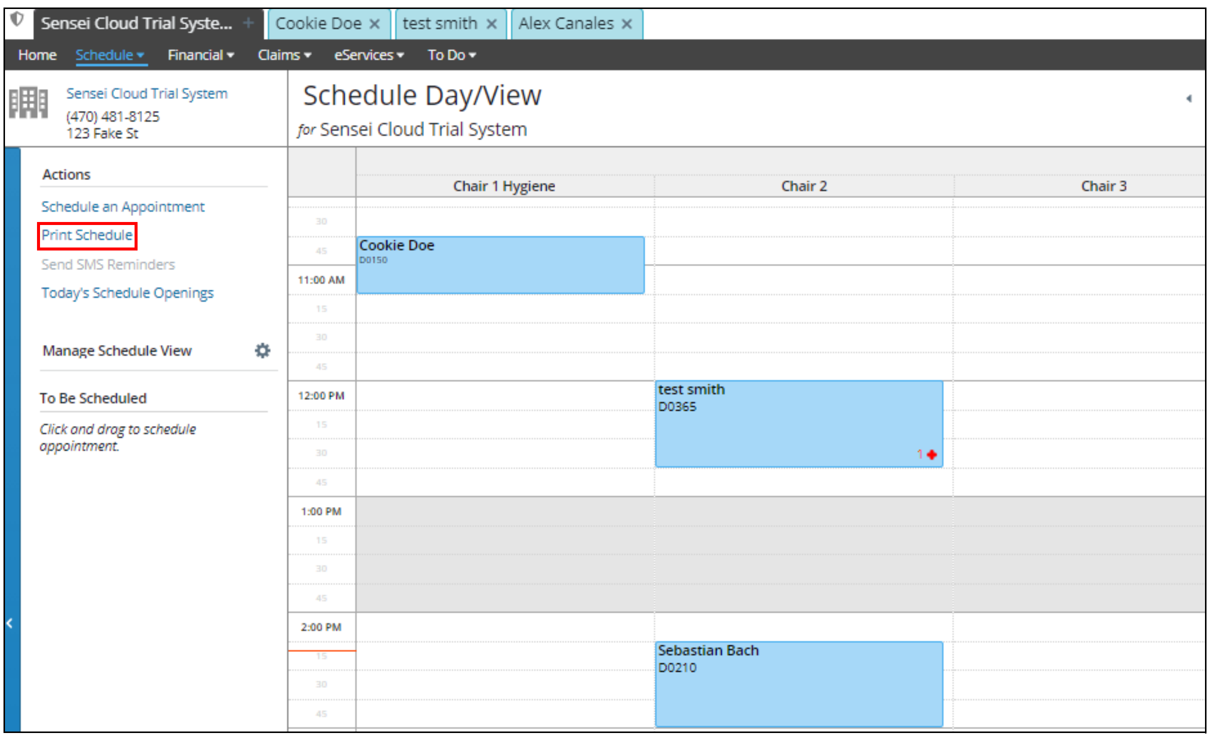
  OR

- Change the **Put on Shortcall** status to **No** on the **Appointment Card**.

Printing the Schedule

To print the Schedule:

1 On the **Location** tab, select **Schedule > Day/Week View.** The Schedule is displayed.



2 Under **Actions**, click **Print Schedule**. The **Print** window is displayed.

3 Select the printer settings.

4 Click **Print.**

Skill Sharpeners

Exercise 1—Screen and schedule an appointment for John Smith.

To screen and schedule an appointment:

1 Find a date on the Schedule on which to schedule Mr. Smith.

2 Under **Actions**, select **Schedule an Appointment**. The **Search Patients** field is displayed.

3 Enter **John Smith**. The **Appointment for John Smith** window is displayed.

4 Click **Screen Patient**. The **Patient Screening Form** is displayed.

5 Ask Mr. Smith each question and select **Yes** or **No**. Then click **Save Changes**.

6 From the **Search for procedures** drop-down list, select **D0150 (comprehensive oral evaluation - new or established patient)**.

7 Click **Schedule Appointment.** The Schedule is displayed.

8 Click-and-drag **John Smith** from the **To Be Scheduled** section to the time slot.

Exercise 2—John Smith calls and states that he needs to reschedule his appointment. He also indicates that he would like an earlier appointment if one becomes available.

To reschedule an appointment and to put John Smith on the Shortcall list:

1 On the Schedule, find Mr. Smith's appointment.

2 Click the appointment. The **Appointment Details** window is displayed.

3 Click **Reschedule.**

4 Find a new date on the Schedule.

5 Under **To Be Scheduled**, click-and-drag **John Smith** to the new time slot. Because Mr. Smith would like an earlier appointment, if possible, you need to add him to the Shortcall list.

6 On the Schedule, click John Smith's appointment. The **Appointment Details** window is displayed.

7 Click the **Pencil** icon in the upper-right corner. The **Appointment Card** is displayed.

8 Under **Appointment Info**, in the **Put on Shortcall** field, select **Anytime.**

9 Click **Update Appointment.**

Exercise 3—You call John Smith to remind him of his appointment date and time. He confirms the date, so you want to confirm Mr. Smith's appointment on the Schedule.

To confirm an appointment:

1 On the Schedule, find Mr. Smith's appointment.

2 Click the appointment. The **Appointment Details** window is displayed.

3 Click **Confirm.** His appointment is displayed with a dark blue triangle in the upper-right corner.

3 Checking Patients In and Out

This lesson contains the following topics:

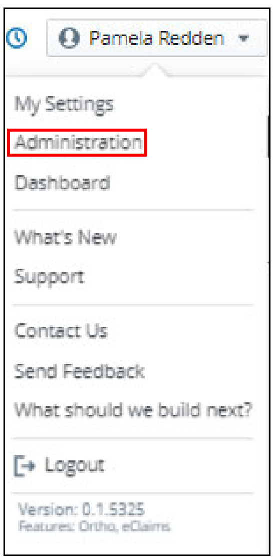
- Screening Patients
- Checking Patients In
- Checking Patients Out

Screening Patients

Sensei Cloud provides a way to screen patients for illness, symptoms, and risk factors prior to booking and checking in. Pre-appointment screening has become common to help protect staff and patients from COVID-19 and other transmissible infections. The Patient Screening form is based on the ADA Return to Work Interim Guidance Toolkit.

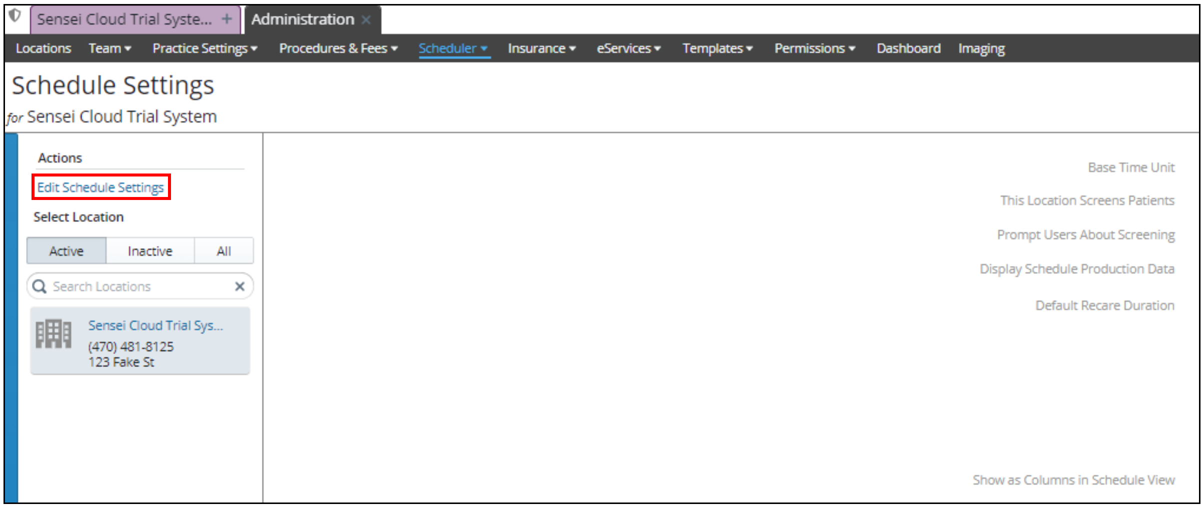
To enable the Patient Screening form:

1 Click your user name and select **Administration.**

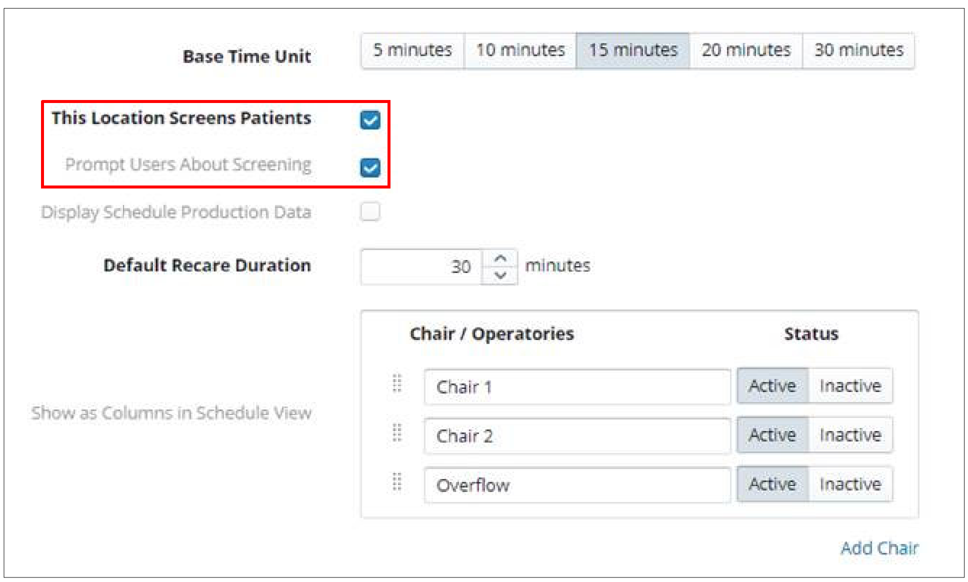


2 On the **Administration** tab, select **Scheduler > Schedule Settings**.

The **Schedule Settings** window is displayed.



3 Under **Actions**, click **Edit Schedule Settings.** The fields for changing the Schedule settings are displayed.

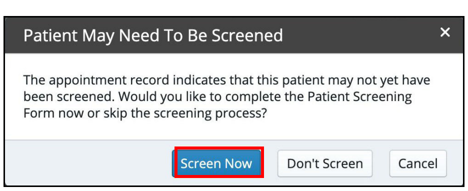


4 Select the **This Location Screens Patients** option. Patient screening controls are added to appointment interfaces and can be accessed at any time.

5 Select the **Prompt Users About Screening** option to prompt users to screen the patient. Prompts are also displayed when screening results indicate risk factors.

6 Click **Save.**

7 When scheduling or checking a patient in and you see the following message, click **Screen Now.**



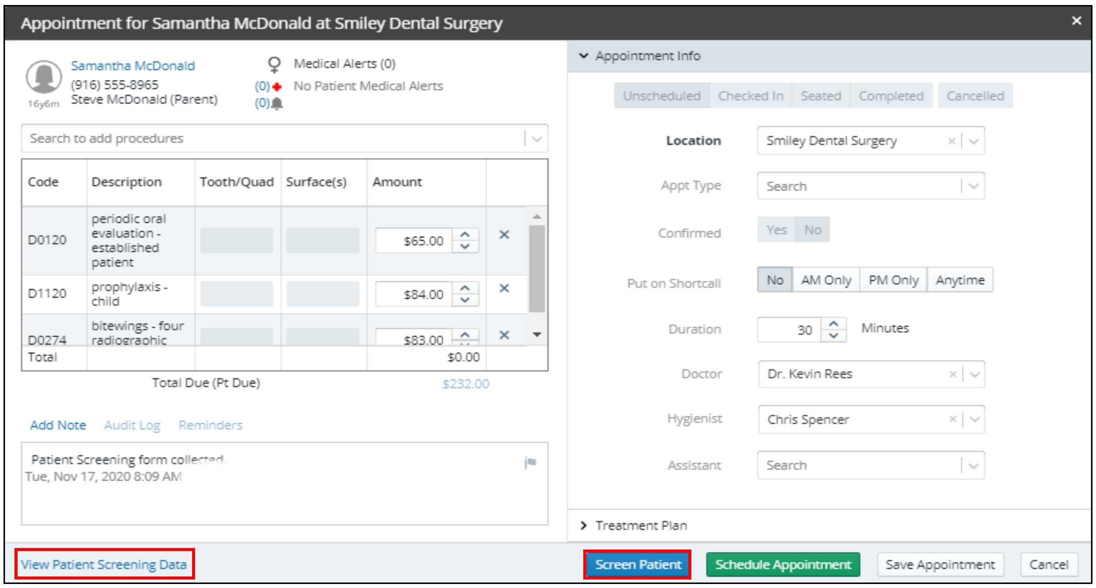
Using the Patient Screening Form

When Patient Screening is enabled, the **Screen Patient** and **View Patient Screening Data** options are added to appointment controls.

A note is created and stored with the patient's appointment and clinical records each time the form is used. When you select **View Patient Screening Data**, the most recent screening is displayed. You can use the drop-down list to access previous forms.

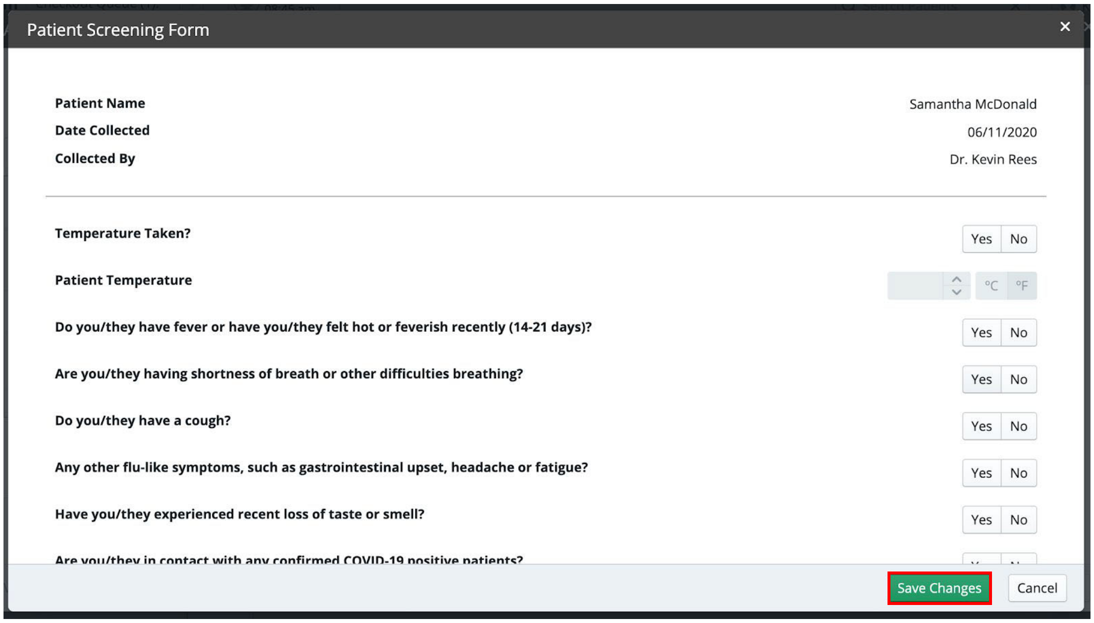
To screen a patient:

1 Select **Screen Now** from the prompt or open a patient's appointment card.



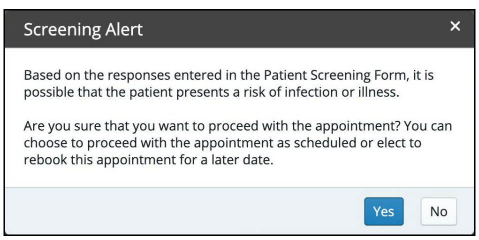
2 Select **Screen Patient**.

The **Patient Screening Form** is displayed.



3 Collect the patient's data and click **Save Changes.**

If the patient answers **Yes** to any question, the following alert is displayed.



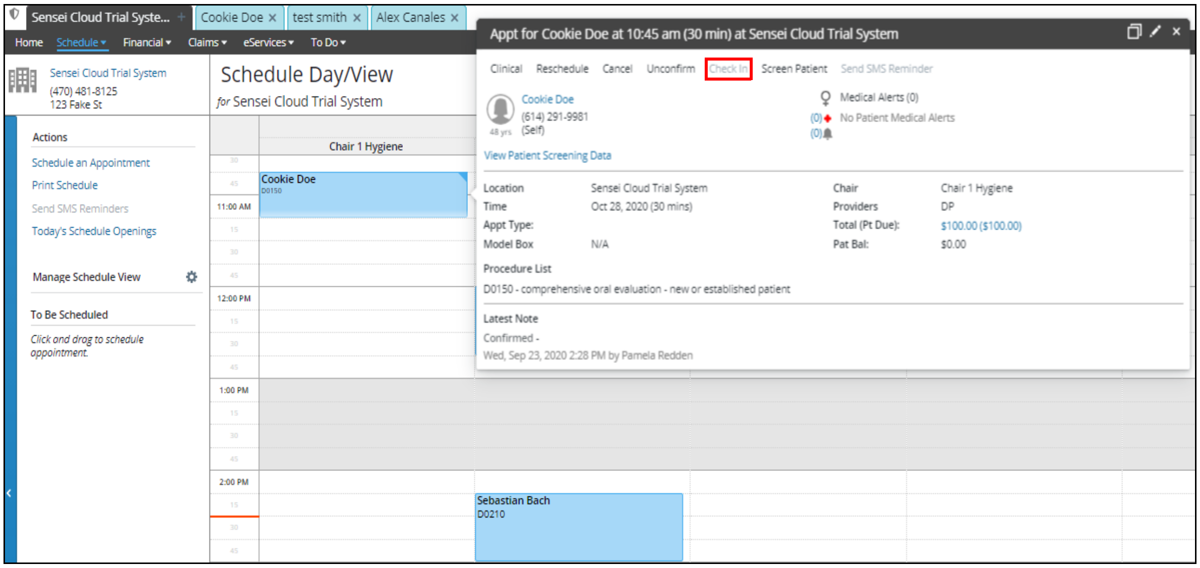
4 Click **Yes** or **No.**

Important: If risks are present, the patient is flagged with a medical alert for a period of three weeks; the **Screening Alert** message is displayed whenever an attempt is made to schedule the patient during that time period.

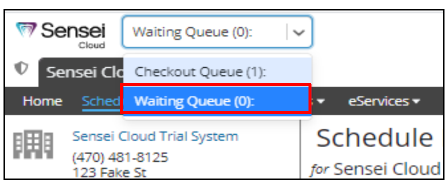
Checking Patients In

To check a patient in:

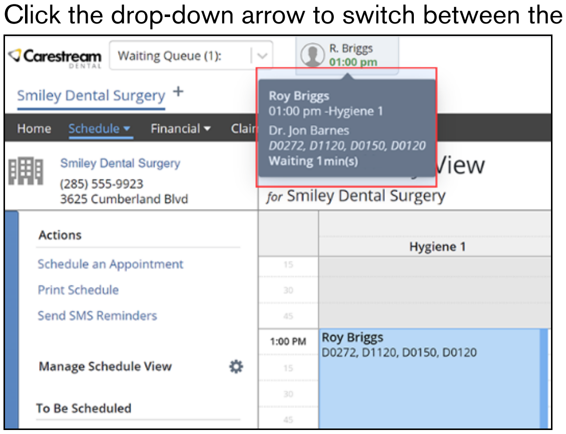
1 Select the patient's appointment on the Schedule. The **Appt. for** window is displayed.



2 Click **Check in.** A blue bar is added to the patient's appointment card, notifying that the patient has arrived, and the patient is placed in the **Waiting Queue.**



3 Click the drop-down arrow to switch between the **Waiting Queue** and the **Checkout Queue.**



4 To view details about the appointment, hover the cursor over the patient tile.

Tip: When a patient has been waiting longer than the scheduled appointment time, the time on the tile changes to red.

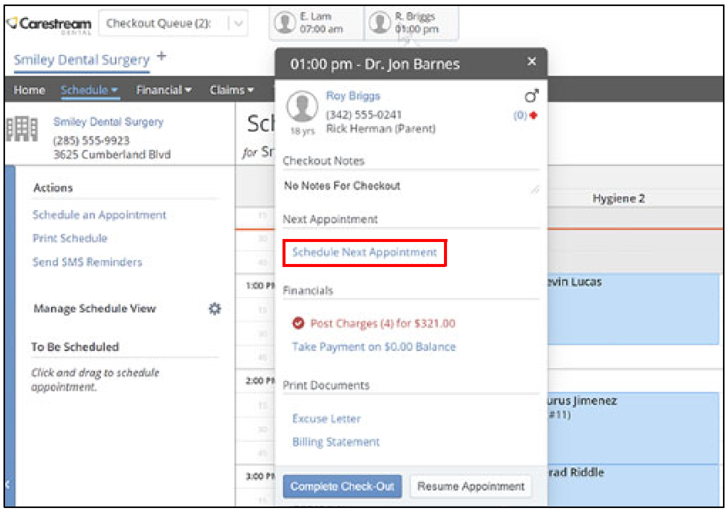
5 After the patient is taken to the operatory, select the appointment and click **Seat.** The patient is removed from the Waiting Queue, and the appointment turns dark blue.

Checking Patients Out

When a patient finishes treatment, change the status to **Complete.** The appointment color changes to light gray, and the patient is moved to the **Checkout Queue**.

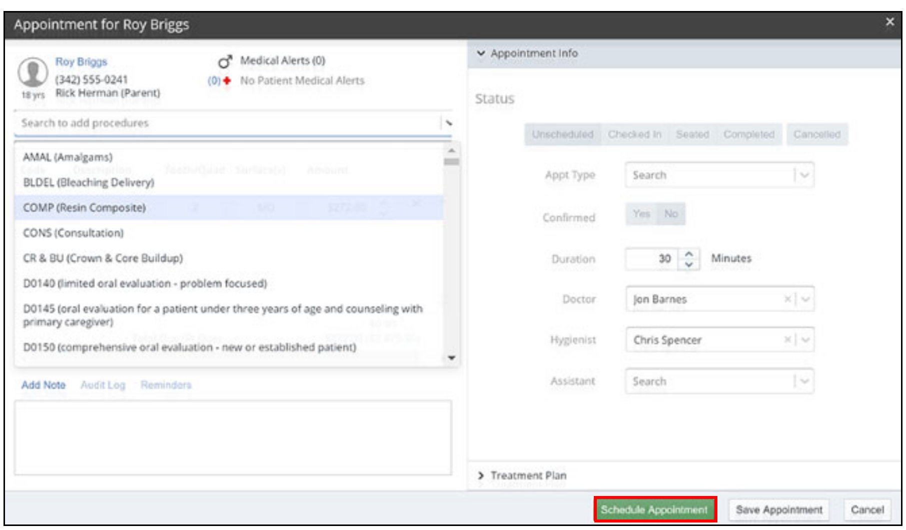
To check a patient out:

1 Select **Checkout Queue** from the **Queue** drop-down list. The patient's name is displayed to the right of the queue.



2 Click the **Patient's name** to see the **Check-out** options and to review any checkout notes.

3 To schedule the patient's next appointment, click **Schedule Next Appointment**. The **Appointment for** window is displayed.



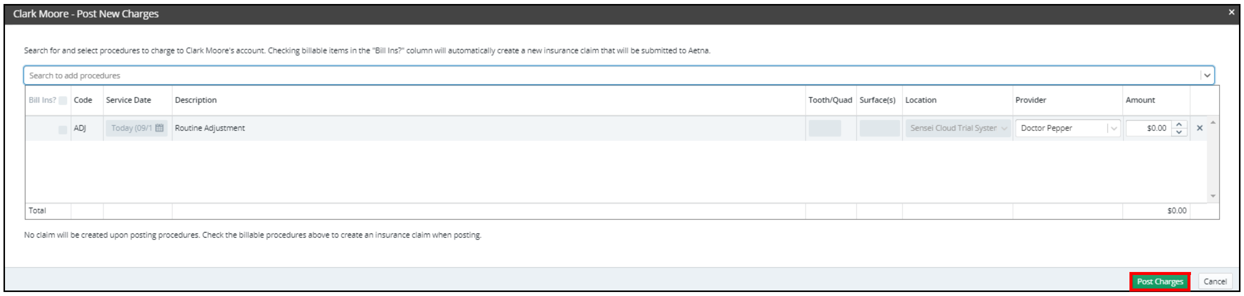
4 Enter the appointment information.

5 Click **Schedule Appointment.** The Schedule is displayed.

6 Find the date for the appointment and click-and-drag the patient's name from the **To Be Scheduled** section to the time slot.

7 Select the patient tile in the **Checkout Queue** again. To complete today's charges, click **Post Charges.**

The **Post Charges** window is displayed.



8 Add, edit, or delete charges, if necessary.

9 Click **Post Charges.**

10 To post a payment, from the **Checkout Queue**, click **Take Payment.**

11 Enter the payment information.

12 Click **Post Payment.**

13 To print a billing statement or an excuse letter, under **Print Documents** in the **Checkout Queue**, click **Excuse Letter** or **Billing Statement.**

14 Click **Complete Checkout.** The appointment turns dark gray.

Skill Sharpeners

Exercise 1—John Smith arrives for his appointment, so you want to screen him and check him in.

To check a patient in and to move the patient to the **Checkout Queue**:

1 Find Mr. Smith's appointment on the Schedule and click it. The **Appt. for John Smith** window is displayed.

2 Click **Check In**. The **Patient May Need To Be Screened** window is displayed.

3 Click **Screen Now**. The **Patient Screening Form** is displayed.

4 Take his temperature, record the temperature, and ask him the questions on the form.

5 Click **Save Changes**. Mr. Smith is placed in the **Waiting Queue**.

6 To view details about his appointment, click or hover the cursor over the patient tile next to the **Waiting Queue**.

7 When Mr. Smith is moved to the operatory, click the patient tile and click **Seat**. The patient is removed from the **Waiting Queue**, and the appointment turns dark blue.

8 When Mr. Smith's treatment is finished, click his name on the Schedule and click **Complete**. The appointment color changes to light gray, and John Smith is moved to the **Checkout Queue**.

Exercise 2—When you check Mr. Smith out, you want to schedule his next appointment and bill his insurance company for today's procedures.

To check Mr. Smith out:

1 Select **Checkout Queue** from the **Queue** drop-down list. Mr. Smith's patient tile is displayed to the right of the queue.

2 Click his name and see if there are any notes in the **Checkout Notes** field.

3 To schedule Mr. Smith's next appointment, click **Schedule Next Appointment**. The **Appointment for John Smith** window is displayed.

4 In the **Search to add procedures** field, click **D7220 (removal of impacted tooth - soft tissue)**.

5 In the **Tooth/Quad** field, type **17**.

6 In the **Location** field, verify that the office location is correct.

7 In the **Appt Type** field, select **Perio** from the drop-down list.

8 In the **Put on Shortcall** field, verify that **Anytime** is selected.

9 In the **Duration** field, increase the appointment time to **60** Minutes.

10 In the **Doctor** and **Assistant** fields, select the names.

11 Click **Schedule Appointment**. The Schedule is displayed.

12 On the Schedule, find the date for the appointment and click-and-drag the patient’s name from the **To Be Scheduled** section to the time slot.

13 Because Mr. Smith has an insurance plan, open the **Checkout Queue** again and click **Post Charges and Bill Ins**.

14 Because Mr. Smith has a $50 deductible, collect the payment for today's services.

15 Mr. Smith requests a receipt, so click **Billing Statement** under **Print Documents.** A PDF file is created and can be printed or emailed.

16 Click **Complete Checkout.** The appointment turns dark gray.

4 Working with Insurance

This lesson includes the following topics:

- Adding New Insurance Payers
- Adding New Insurance Plans
- Setting Up Insurance Claim Processing
- Managing Insurance Claims
- Printing Insurance Claims

Adding New Insurance Payers

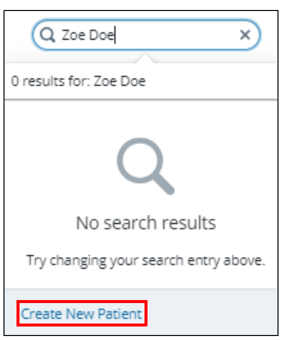
You can add new insurance payers in the Patient Record and as an administrator from the **Administration** tab.

In a Patient Record

You can add insurance information when you create a new Patient Record and when you edit an existing Patient Record.

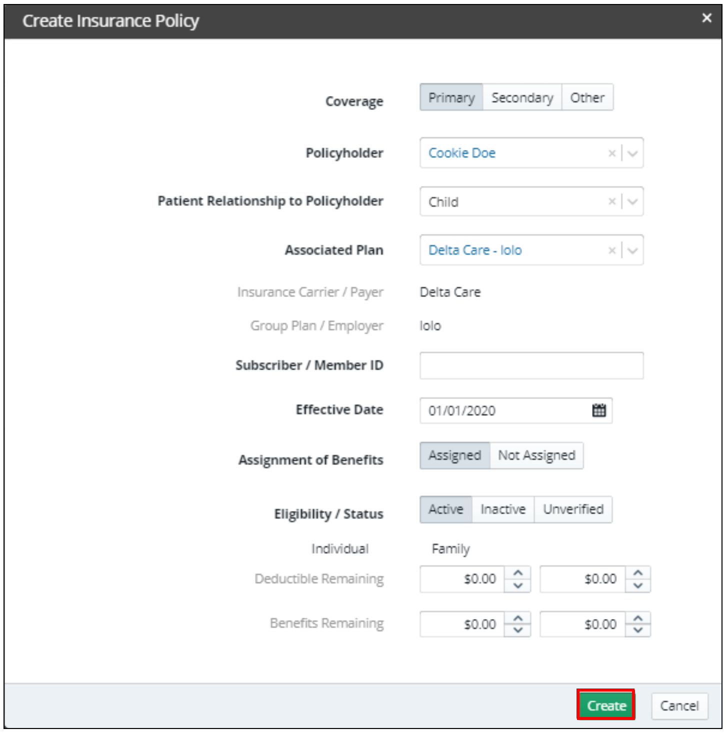
To add an insurance payer in a new Patient Record:

1. In the **Search Patients** field, type the new patient's name to make sure he or she is not in the database. A **No Search Results** message is displayed.



2. Click **Create New Patient**. The **Create Patient** window is displayed.
3. Add information in the fields. See Adding Patients for more information.

4 Use the scroll bar to find the **Insurance Information** section, and click **Add Insurance Policy.** The **Create Insurance Policy** window is displayed.



5 In the **Coverage** field, select **Primary**, **Secondary**, or **Other.**

6 In the **Policyholder** field, select the policyholder to be associated with the policy.

7 In the **Patient Relationship to Policyholder** field, select:

- **Spouse**
- **Child**
- **Employee**
- **Handicapped Dependent**
- **Life Partner**
- **Dependent**

8 In the **Associated Plan** field, select the employer from the list.

9 In the **Subscriber / Member ID**, enter the identification number.

10 In the **Effective Date**, select a date from the calendar.

11 In the **Assignment of Benefits** field, click **Assigned** or **Not Assigned.**

12 In the **Eligibility / Status** field, click **Active**, **Inactive**, or **Unverified.**

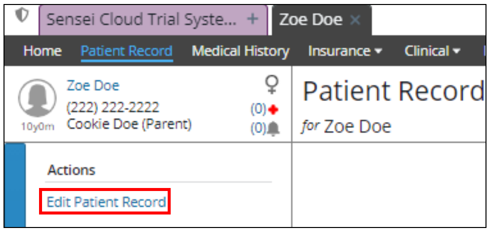
13 In the **Deductible Remaining**, add the amount per individual.

14 Click **Create.**

15 Click **Save Patient.**

To add an insurance payer to an existing Patient Record:

1 On a patient's tab, click **Patient Record.**



2 Under **Actions**, click **Edit Patient Record.**

3 Scroll down or jump to the **Insurance Information** section.

4 Click **Add Insurance Policy.** The **Create Insurance Policy** window is displayed.

5 Enter information in the fields as in the preceding steps 5 through 13.

6 Click **Create.**

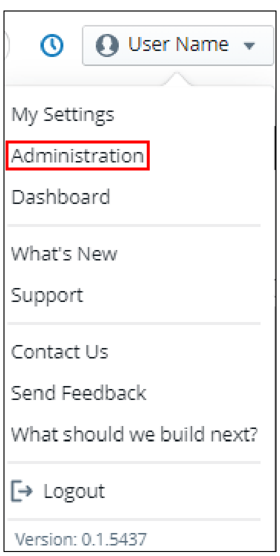
7 Click **Save Patient.**

Note: To edit existing insurance information in the **Insurance Information** section, click **Edit** to the far right of the Policy Holder's name.

From the Administration Tab

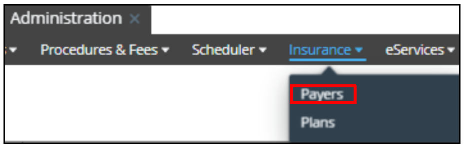
To add an insurance payer from the **Administration** tab:

1 Click your user name in the upper-right corner of the window. A list is displayed.

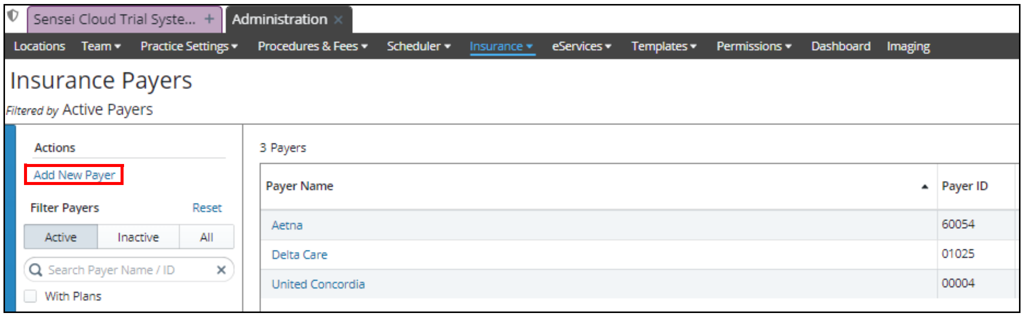


2 Click **Administration**, if you have user permission.

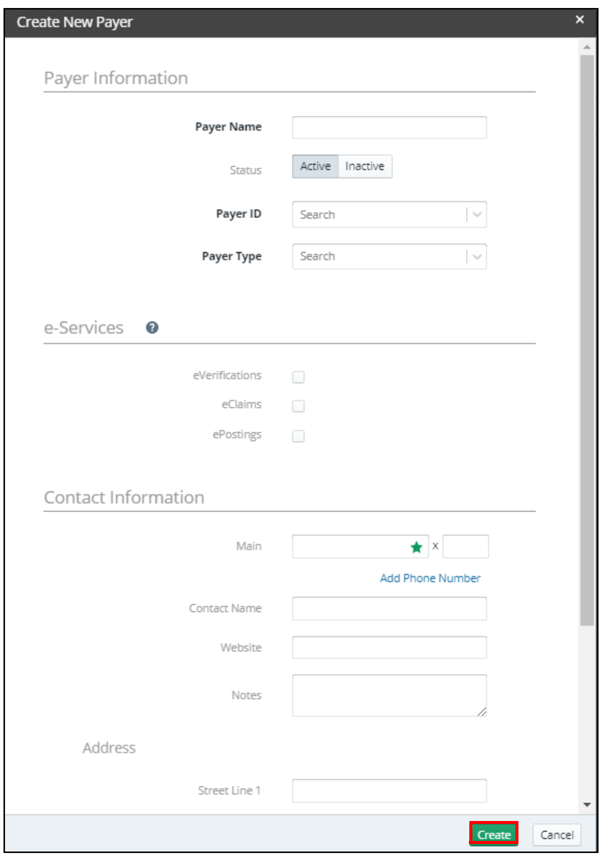
3 On the **Administration** tab, click **Insurance.**



4 Select **Payers.** The **Insurance Payers** window is displayed.



5 Under **Actions**, click **Add New Payer.** The **Create New Payer** window is displayed.



6 Enter information in the fields.

Note: In the **Payer Type** field, if the type is not listed, select **Commercial.**

7 Click **Create.**

Editing Insurance Payers

To edit an insurance payer from the **Administration** tab:

1. Click your user name in the upper-right corner of the window. A list is displayed.
2. Click **Administration**, if you have user permission.
3. On the **Administration** tab, click **Insurance**.
4. Select **Payers**.
5. Under **Actions**, click the name of the insurance payer you want to edit. The **Update [Payer]** window is displayed.
6. Make the changes.
7. Click **Update**.

Adding New Insurance Plans

You add new insurance plans when you create a new policy in a Patient Record and, as an administrator, from the **Administration** tab.

In a Patient Record

You can add an insurance plan when you create a new Patient Record and when you edit an existing Patient Record.

To add an insurance plan in a Patient Record:

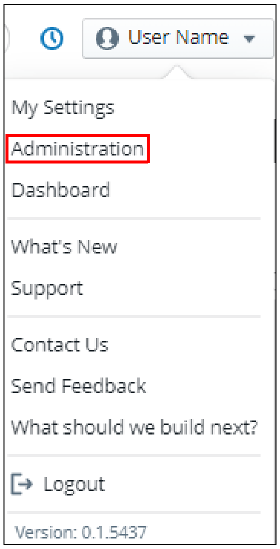
1. For a new patient, in the **Search Patients** field, type the patient's name to make sure he or she is not in the database and then click **Create New Patient**.
2. In the **Patient Record**, add information in the required fields, which are displayed in bold.
3. In the **Jump To** section, click **Insurance Information**, or use the scroll bar to find the **Insurance Information** section.
4. Click **Add Insurance Policy**. The **Create Insurance Policy** window is displayed.
5. Follow steps 5 through 15 in "Adding New Insurance Payers" on page 37.

   Note: The **Associated Plan** field is required. From the drop-down list, select the patient's employer.

From the Administration Tab

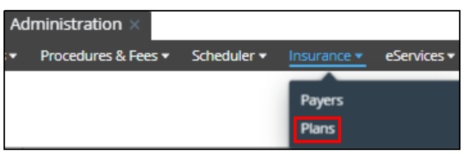
To add an insurance plan from the **Administration** tab:

1 Click your user name in the upper-right corner of the window. A list is displayed.

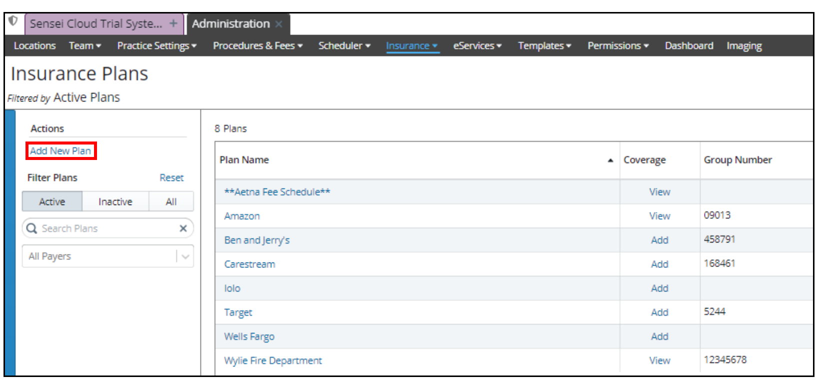


2 Click **Administration**, if you have user permission.

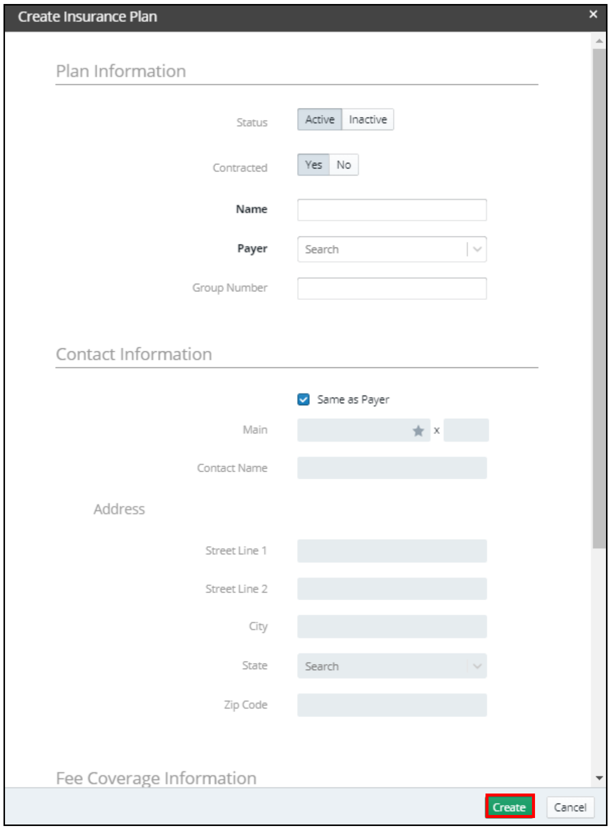
3 On the **Administration** tab, click **Insurance**.



4 Select **Plans**. The **Insurance Plans** window is displayed.



5 Under **Actions**, select **Add New Plan**. The **Create Insurance Plan** window is displayed.



6 In the **Status** field, verify that **Active** is selected.

7 In the **Name** field, type the employer name.

8 In the **Payer** field, select an insurance company.

9 In the **Group Number** field, enter the number, if you know it.

10 In the **Contact Information** section, select the **Same as Payor** option **OR** deselect the option and add the information in the fields.

11 Click **Create**.

Editing Insurance Plans

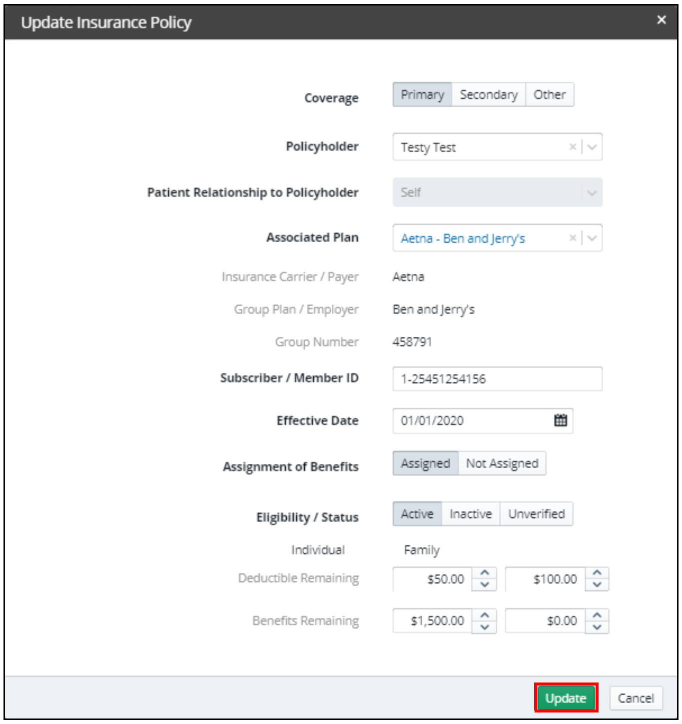
To edit an insurance plan:

1 In a patient's record, click **Edit Patient Record**.

2 In the **Jump To** section, click **Insurance Information**, or use the scroll bar to find the **Insurance Information** section.

3 To the right of the **Type** field, click **Edit**.

The **Update Insurance Policy** window is displayed.



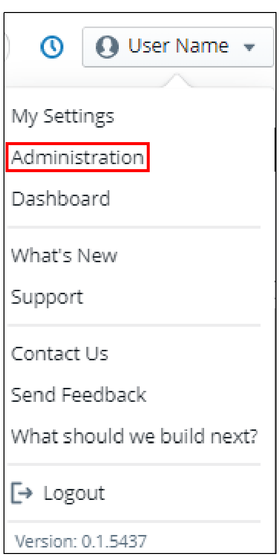
4 In the **Associated Plan** field, select a different employer from the drop-down list.

5 Click **Update.**

Setting Coverage Details and Benefits by Category on an Insurance Plan

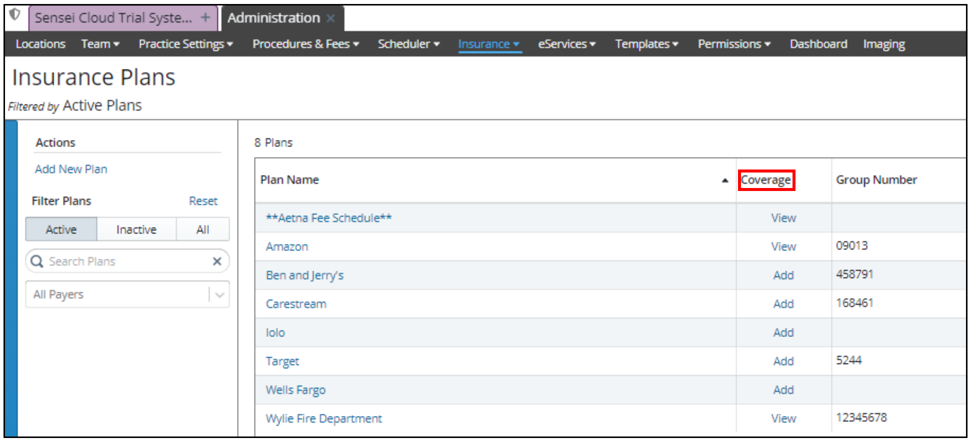
To set up coverage details and benefits by category on an insurance plan:

1 Click your user name in the upper-right corner of the window. A list is displayed.



2 Click **Administration**, if you have user permission.

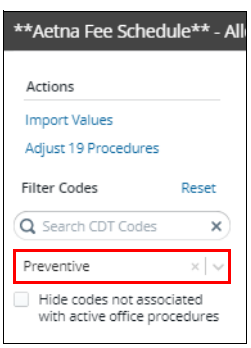
3 On the **Administration** tab, select **Insurance > Plans.** The **Insurance Plans** window is displayed.



4 In the **Coverage** column, click **Add** or **View** for the plan.

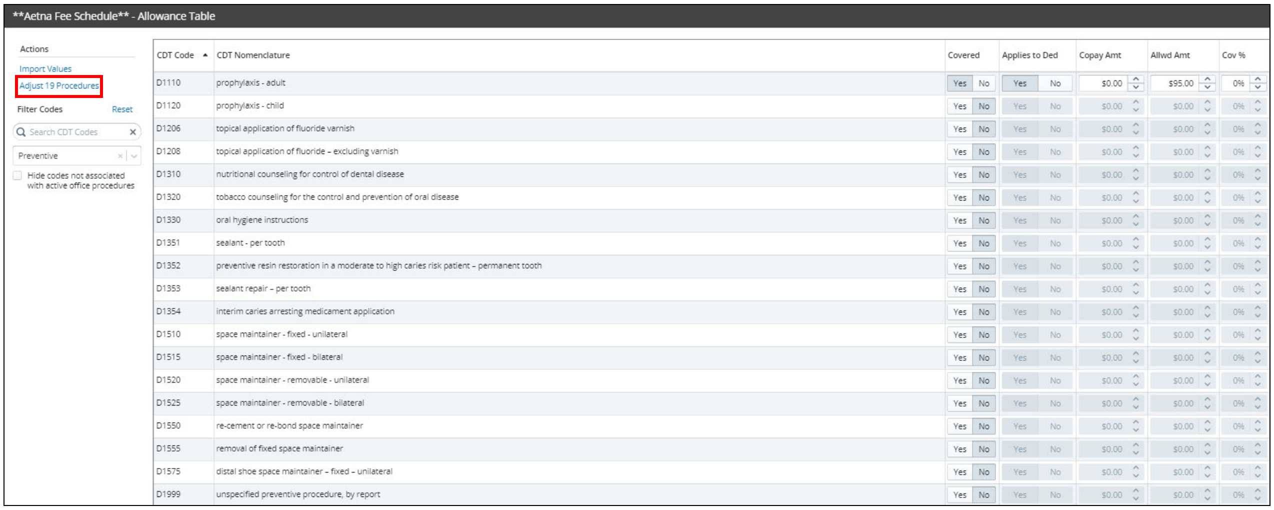
The **Allowance Table Summary** for the plan is displayed.

5 Click **Edit Allowance Table Details for this Plan.**



6 Under **Actions**, from the **Category** drop-down list, select a category.

The **Allowance Table** for the procedures in that category are displayed.



7 Click **Adjust # Procedures.** The **Adjust Coverage Rules** window is displayed.

8 Select the items you want to adjust and then make the adjustment:

- **Covered**–Select **Yes** or **No.**
- **Applies To Deductible**–Select **Yes** or **No.**
- **Copay Amount**–Enter a dollar amount.
- **Coverage Percentage**–Enter a percentage.

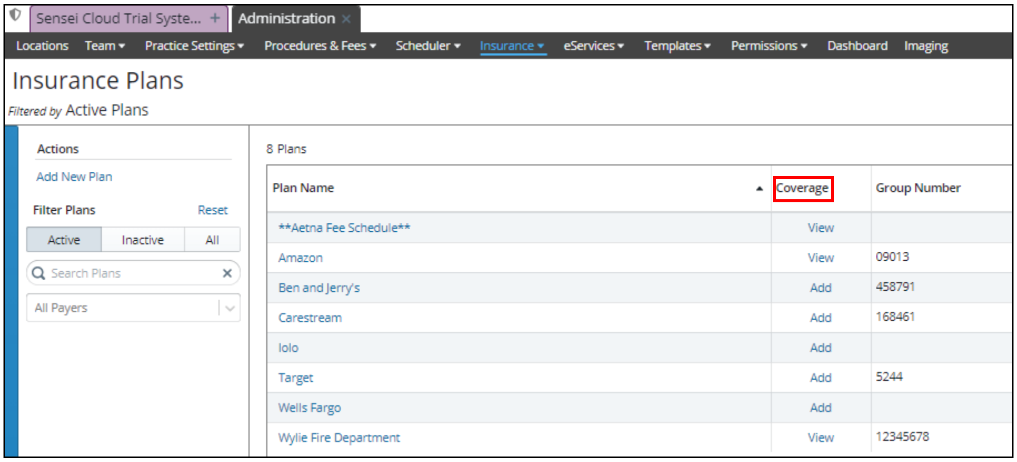
9 Click **Apply.**

10 Click **Save Changes.**

Importing Coverage Details to an Insurance Plan

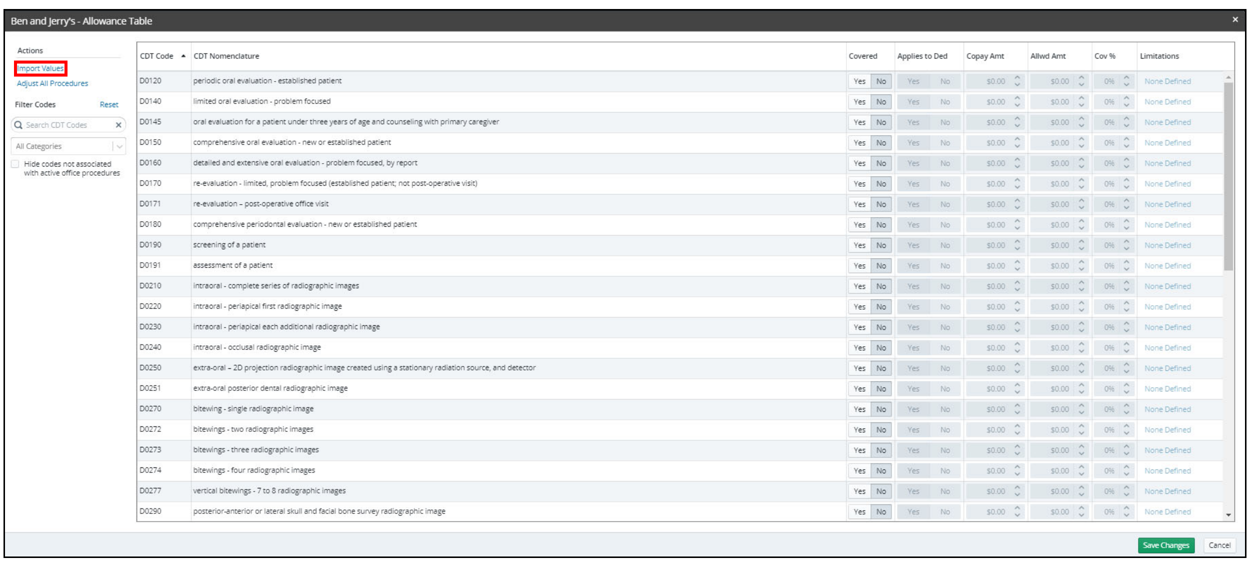
To import coverage details:

1 On the **Administration** tab, select **Insurance > Plans.** The **Insurance Plans** window is displayed.



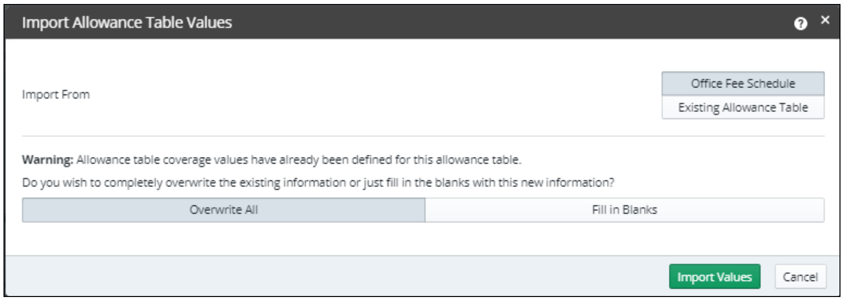
2 In the **Coverage** column field for the appropriate plan, click **Add** or **View.**

If you click **View**, you must then click **Edit Allowance Table Details for this Plan.** The **Allowance Table** for the plan is displayed.



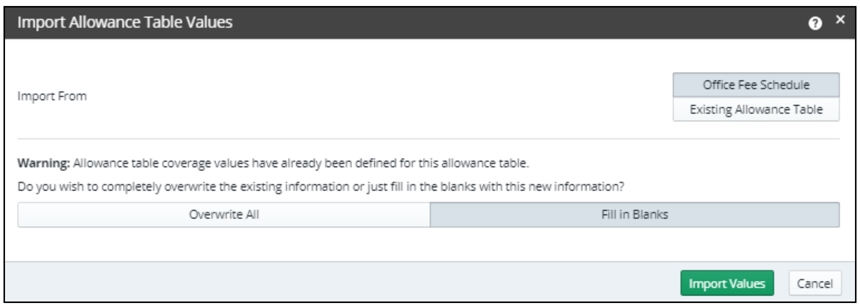
3 Under **Actions**, click **Import Values.** The **Import Allowance Table Values** window is displayed.

Important: Before you can import office fees into an insurance plan, all procedures must have a fee associated with them.

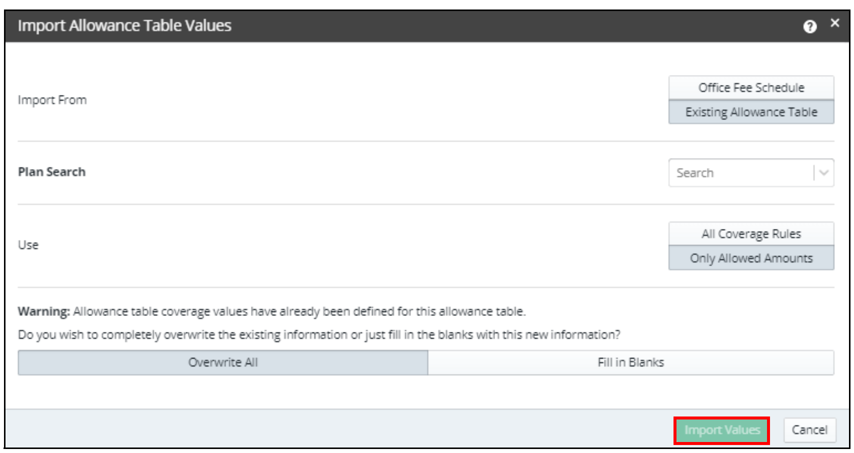


4 In the **Import From** field, select **Office Fee Schedule** or **Existing Allowance Table.**

- If you select **Office Fee Schedule**, select **Overwrite All** or **Fill in Blanks.**



- If you select **Existing Allowance Table**, more options are displayed.



- Do the following:
  - Select the plan from the drop-down list.
  - Select **All Coverage Rules** or **Only Allowed Amounts.**
  - Select **Overwrite All** or **Fill in Blanks.**

5 Click **Import Values.**

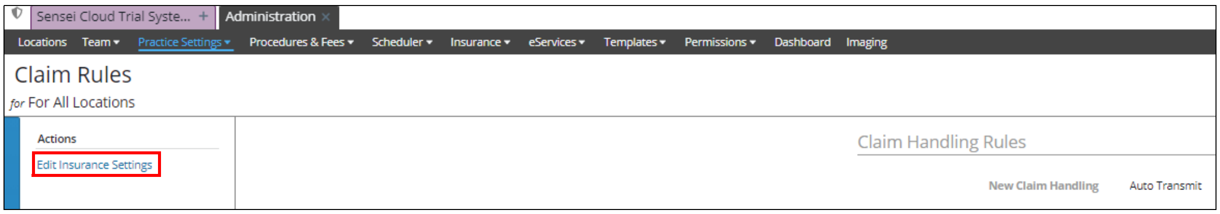
6 Click **Save Changes.**

Setting Up Insurance Claim Processing

To define how insurance claims are processed:

1 Click your user name and then click **Administration.** The **Administration** tab is displayed.

2 Select **Practice Settings > Claim Rules.** The **Claim Rules for** window is displayed.



3 Click **Edit Insurance Settings.**

4 Under **Claim Handling Rules**, in the **New Claim Handling** field, select one of the following:

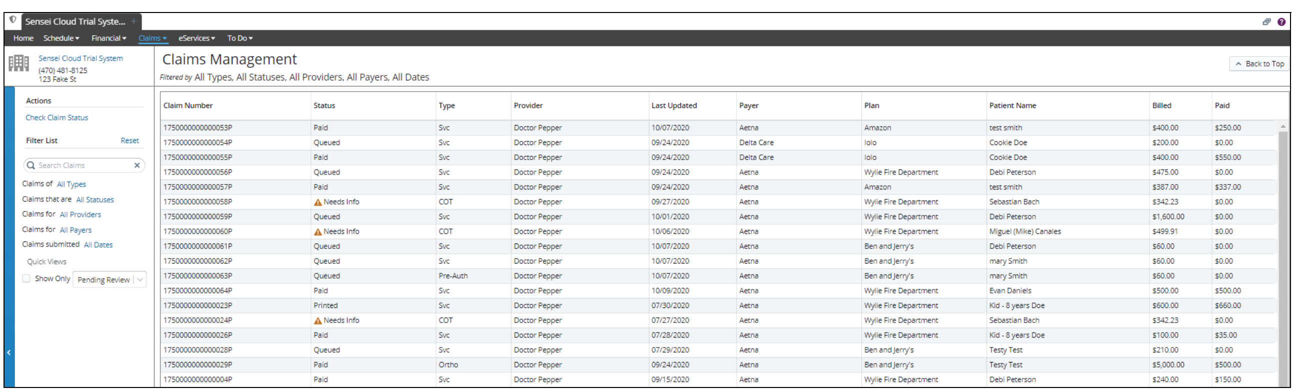
- **Auto Transmit**–Automatically queues generated insurance claims for transmission to the clearinghouse, provided that all claim requirements are met.
- **Hold for Review**–Places all generated insurance claims into a temporary hold state, allowing for a review prior to transmission of the claim.

  Note: The hold status enables you to print and review the claim before sending it.

5 Click **Save.**

Managing Insurance Claims

To manage claims for a location or for all locations in a practice, use the **Claims Management** window. From the **Location** tab, select **Claims > Claims Management.** The **Claims Management** window is displayed, listing the claims for the location.

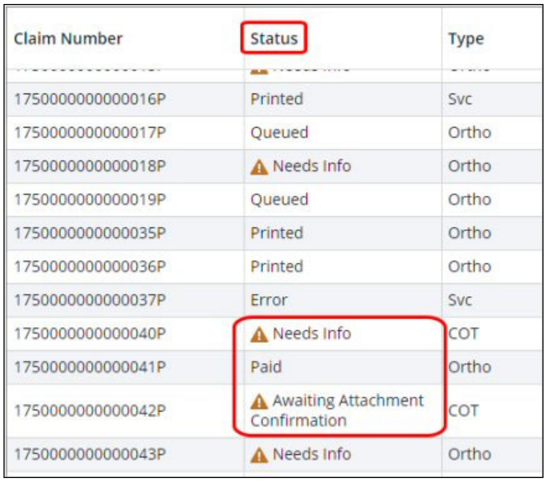


For each claim, you can view the **Claim Number**, **Status**, **Type**, **Provider**, **Last Updated Date**, **Payer**, **Plan**, **Patient Name**, **Billed Amount**, and **Paid Amount.**

You can:

- Sort the list by any column
- Search claims by patient, policyholder, claim ID, and procedure code
- Display only the claims that are cancelled, pending review, or awaiting attachments

Claims that require action display an **Alert** icon in the **Status** column.

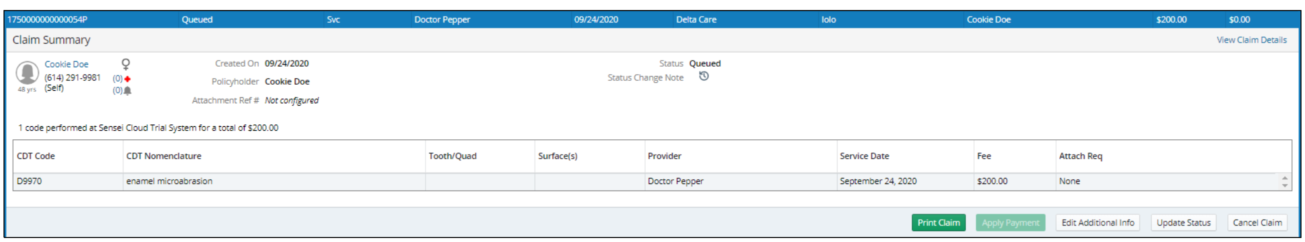


Claim Number	Status	Type
1750000000000016P	Printed	Svc
1750000000000017P	Queued	Ortho
1750000000000018P	Needs Info	Ortho
1750000000000019P	Queued	Ortho
1750000000000035P	Printed	Ortho
1750000000000036P	Printed	Ortho
1750000000000037P	Error	Svc
1750000000000040P	Needs Info	COT
1750000000000041P	Paid	Ortho
1750000000000042P	Awaiting Attachment Confirmation	COT
1750000000000043P	Needs Info	Ortho

The claim type is assigned automatically when a claim is generated:

- **Svc**–Statement of actual services
- **Pre-Auth**–Request for pre-authorization
- **COT**–Continuation of treatment for orthodontic services
- **Ortho–**Initial claim for orthodontic treatment

To view a claim summary, select a claim in the list. The **Claim Summary** window is displayed.



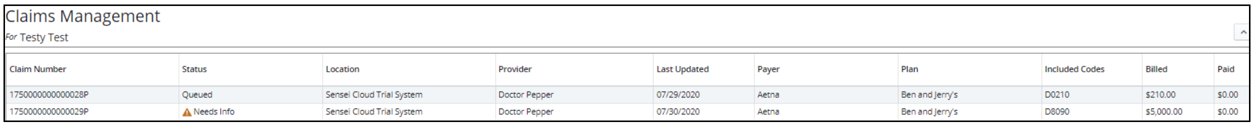
In the **Claim Summary** window, you can:

- View the claim details
- Print the claim
- Apply a payment
- Edit additional information
- Update the claim status
- Cancel the claim

Cancelling and Resubmitting Insurance Claims

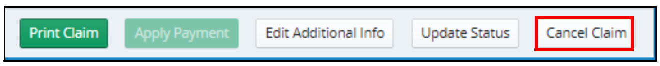
If an error exists on a claim, you must cancel it and then resubmit it. To cancel and resubmit a claim:

1 From the **Patient** tab, select **Insurance > Claims Management.** The **Claims Management** window is displayed.



2 Select the claim you want to cancel.

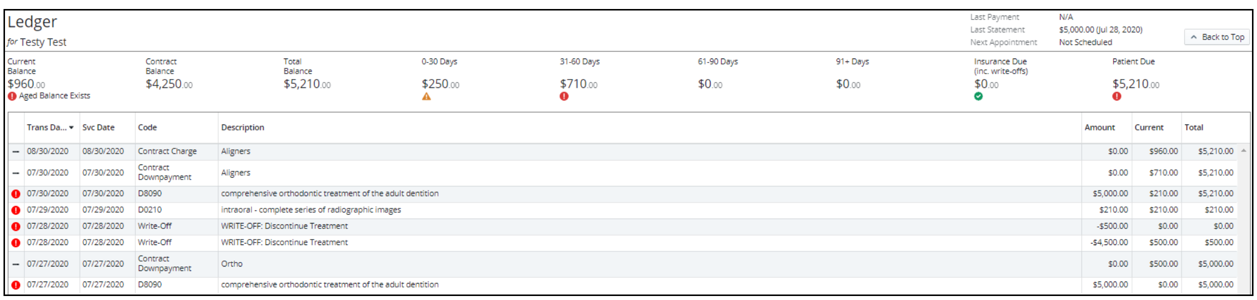
The **Claim Summary** window is displayed.



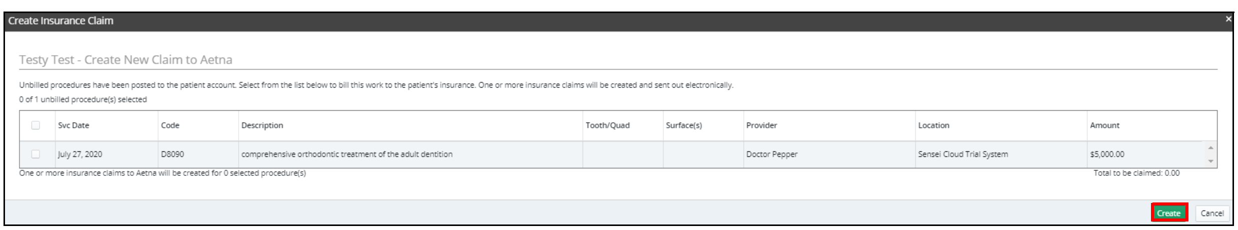
3 In the lower-right, click **Cancel Claim.** A message is displayed.

4 Click **Yes.**

5 Click **Financials.** The **Ledger for** window is displayed.



6 Under **Actions**, click **Create New Claim.** The **Create Insurance Claim** window is displayed.



7 Click **Create.**

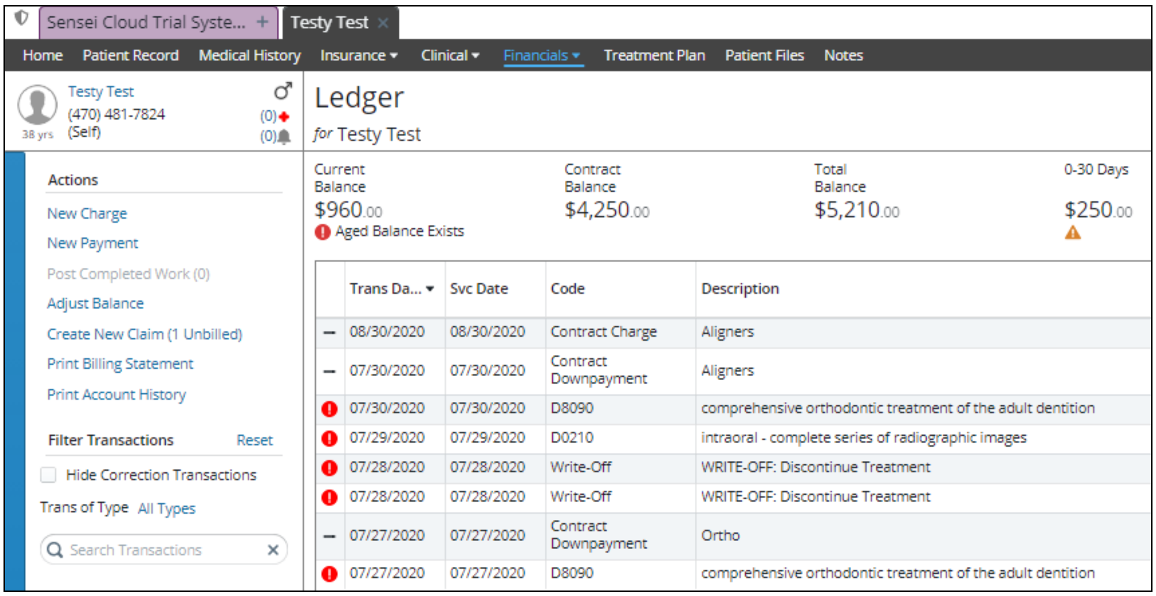
Adjusting Charges

If you need to adjust a charge that was submitted to insurance, you must first cancel the insurance claim. See "Cancelling and Resubmitting Insurance Claims" on page 51 for more information.

To adjust a charge posted in error to a patient's ledger:

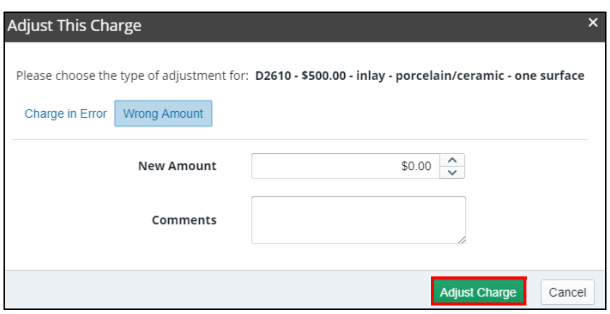
1 Find the patient for whom you want to adjust a charge and click the **Patient Record** tab.

2 Select **Financials > Ledger**. The **Ledger for** window is displayed.



3 Click on the procedure line to view the charge details. The **Charge Details** window is displayed.

4 Click **Adjust This Charge** in the upper-right corner of the window. The **Adjust This Charge** window is displayed.



5 Select **Charge in Error** or **Wrong Amount**.

Note: Charge in Error removes the entire charge; **Wrong Amount** enables you to enter the correct procedure fee.

6 Enter the correct amount.

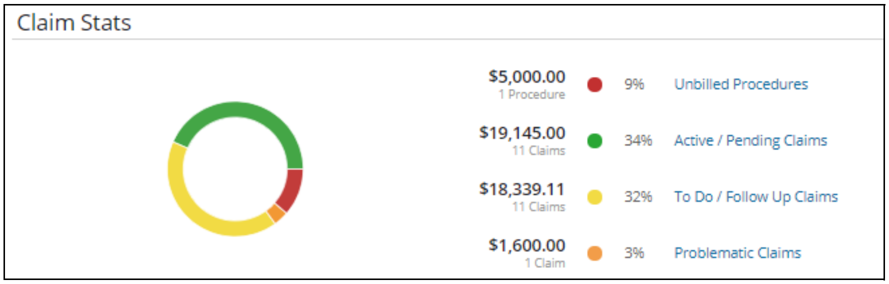
7 Enter a note in the **Comments** field.

8 Click **Adjust Charge**.

Viewing Insurance Claim Statistics

To view claim stats:

1 Click the location's **Home** tab. The **Home** window displays the claim statistics at the bottom.



2 In the **Claim Stats** section, click one of the following to see the statistics:

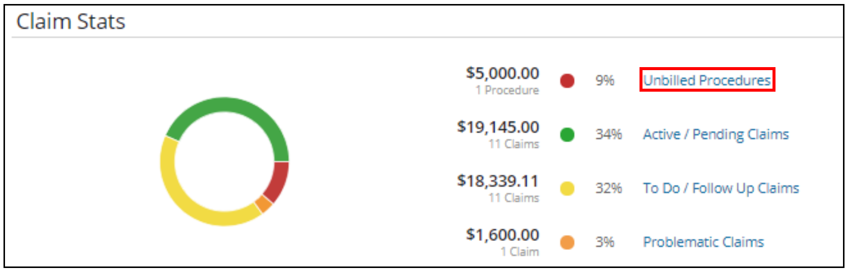
- **Unbilled Procedures**–Patients who have insurance, but claims have not been prepared for the services rendered.
- **Active / Pending Claims**–Claims that have been submitted to an insurance company or are queued and pending submission.
- **To Do / Follow Up Claims**–Claims that need action. These claims are filtered by:
  - **Needs Info**
  - **Awaiting Attachments**
  - **Awaiting Attachment Confirmation**
  - **Pending Review**
  - **All Providers**
  - **All Payers**
  - **All Dates**
- **Problematic Claims**–Claims that contain errors or encountered problems. These claims are filtered by:
  - **Rejected**
  - **Denied**
  - **Error**
  - **Reopened**
  - **All Providers**
  - **All Payers**
  - **All Dates**

Processing Unbilled Procedures

Unbilled procedures are procedures that have been completed and posted to patient ledgers, but not yet billed to an insurance company.

To process unbilled procedures:

1 Click the location's **Home** tab. The **Home** window displays the claim statistics at the bottom.



2 In the **Claim Stats** section, click **Unbilled Procedures**.

OR

On the **Home** tab, select **To Do > Unbilled Procedures**.

The **Unbilled Procedures** window displays a list of patients for whom billable work has been completed, but not billed to their insurance companies.

Unbilled Procedures

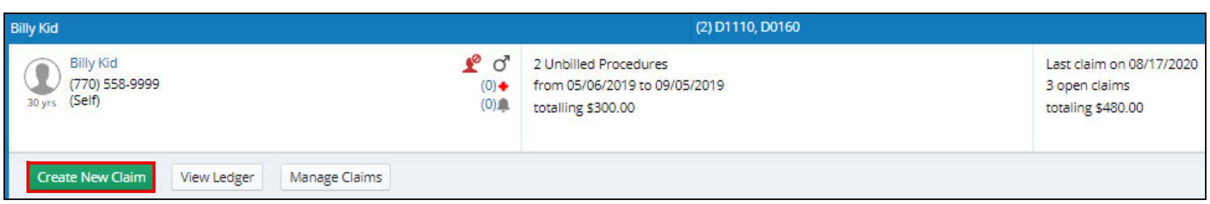
Filtered by All Patients, All Providers, All Payers, All Production Values, All Times

Patients 4
Procedures 12
Production Value $1,268.30

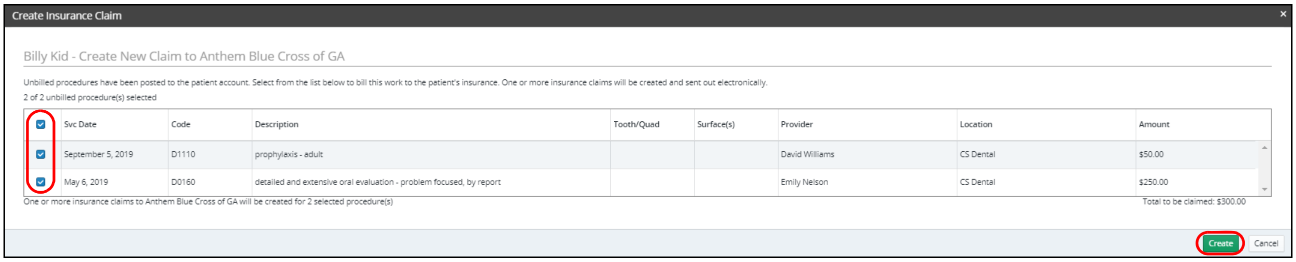
Patient	Unbilled procedures	Unbilled Since	Unbilled
Heath Garza	(4) D0120, D1110, D0274, D1330	10/30/2019	$415.25
Terrence Molarnator	(4) D9310, D0220, D0230, D9310	08/02/2019	$367.00
Nye Moloney	(2) D9310, D0210	08/15/2019	$317.00
Kenneth Smith	(2) D0120, D0140	01/07/2020	$169.05

Note: You can filter the list by patients, providers, payers, a service date or range, or a revenue value range.

3 Click an item in the list to view summary details and insurance information, to view the patient's ledger, or to manage claims for the patient.



4 Click **Create New Claim**. The **Create Insurance Claim** window is displayed with a list of the patient's unbilled procedures.



5 Select the procedures to include in the claim.

6 Click **Create**.

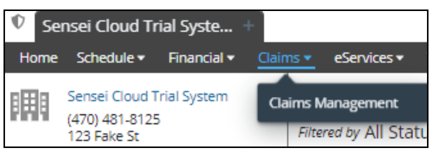
Printing Insurance Claims

You can print claims from the location's **Home** tab and from a **Patient Record** tab.

Important: If you print a claim before submitting it electronically, you must change the status of the claim back to queued for it to be submitted.

To print insurance claims:

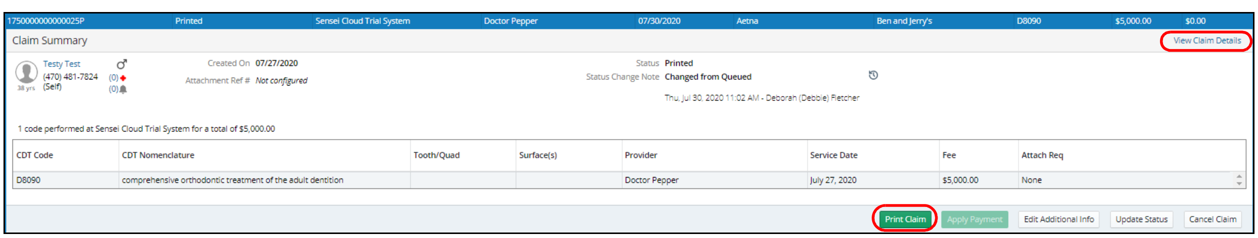
1 On the location's **Home** tab, select **Claims > Claims Management**.



A list of claims is displayed.

2 Use the **Filter List** options to refine the list, as needed.

3 Select a claim to print. The **Claim Summary** is displayed.



4 To view details, click **View Claim Details.**

5 Click **Print Claim.** A PDF file that can be printed is generated, and the status of the claim is changed to **Printed.**

Note: A notification is displayed when you submit a claim electronically to the CSD clearinghouse with a status of **Printed**, or when you print a claim that has already been submitted, paid, or settled.

Skill Sharpeners

Exercise 1—John Smith arrives for his appointment and provides you with his insurance information. Create the insurance policy for Mr. Smith.

To add a new insurance payer:

1 On John Smith's **Patient** tab, click **Patient Record.**

2 Under **Actions**, click **Edit Patient Record**.

3 Use the scroll bar or jump to **Insurance Information.**

4 Click **Add Insurance Policy.** The **Create Insurance Policy** window is displayed.

5 In the **Coverage** field, click **Primary.**

6 In the **Payer Name** field, select **John Smith.**

7 In the **Patient Relationship to Policyholder** field, verify that **Self** is displayed.

8 In the **Associated Plan** drop-down list, select **ABC Dental.**

9 In the **Subscriber / Member ID** field, type **DO123.**

10 In the **Effective Date**, select **10/01/2020.**

11 In the **Assignment of Benefits** field, click **Assigned**.

12 In the **Eligibility / Status** field, click **Active**.

13 In the **Individual Deductible** field, enter **$150.00**.

14 Click **Create**.

15 Click **Save Patient.**

Exercise 2—You realize you made an error on Mr. Smith's policy.

To edit an insurance policy:

1 On John Smith's **Patient** tab, click **Patient Record.**

2 Under **Actions**, click **Edit Patient Record**.

3 Use the scroll bar or jump to **Insurance Information** and click **Edit**. The **Update Insurance Policy** window is displayed.

4 Change the **Individual Deductible** amount to $**50.00**.

5 Click **Update.**

6 Click **Save Patient.**

5 Working with Charges and Payments

This lesson contains the following topics:

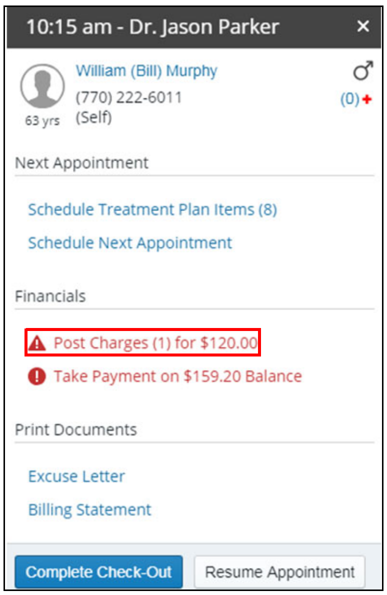
- Posting Charges
- Posting Payments
- Running the Final Daysheet

Posting Charges

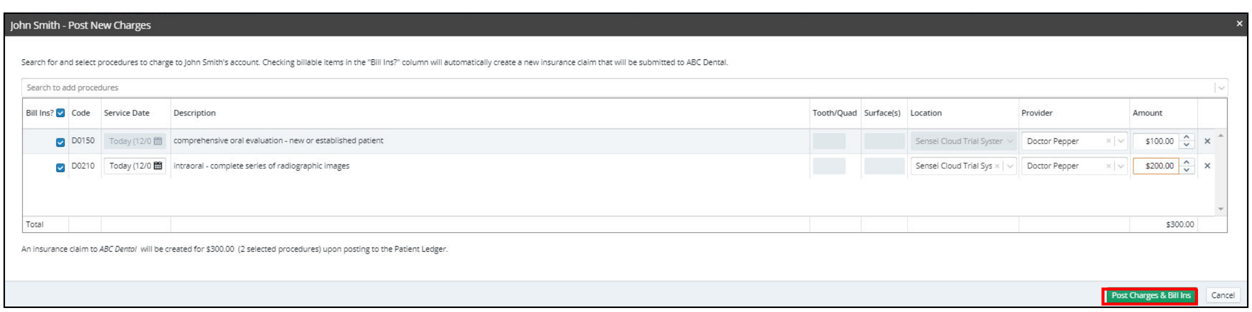
To post a charge at check out:

1 After changing the **Appointment Status** to **Complete**, the patient is placed in the **Checkout Queue.**

2 If more than one patient is displayed, click the patient you want to check out**.** The **Checkout** window is displayed.



3 Click **Post Charges.** The **Post New Charges** window displays the procedures attached to the appointment. In the **Search to add procedures** field, you can additional procedures. .



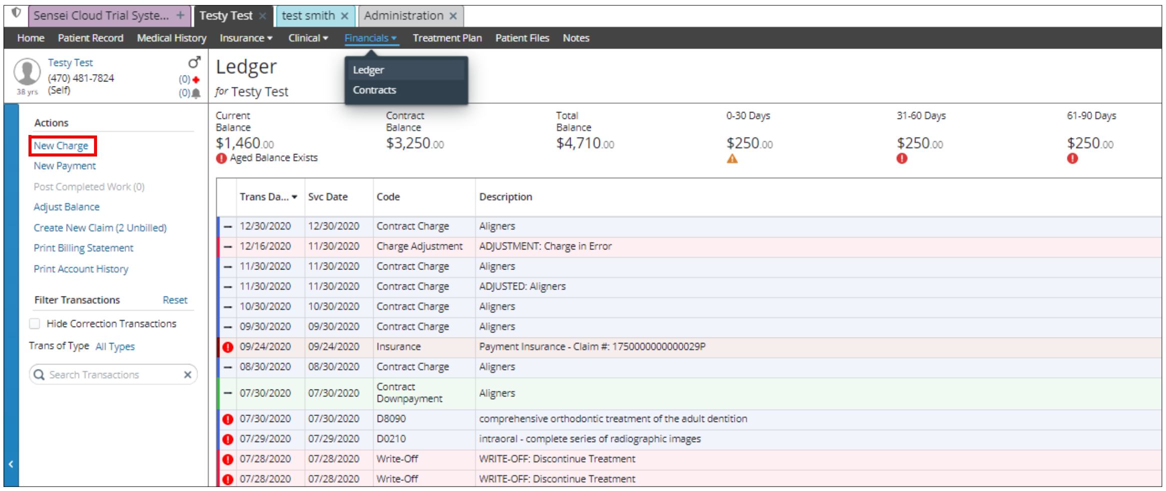
4 Click **Post Charges & Bill Ins.**

Posting Charges to the Ledger

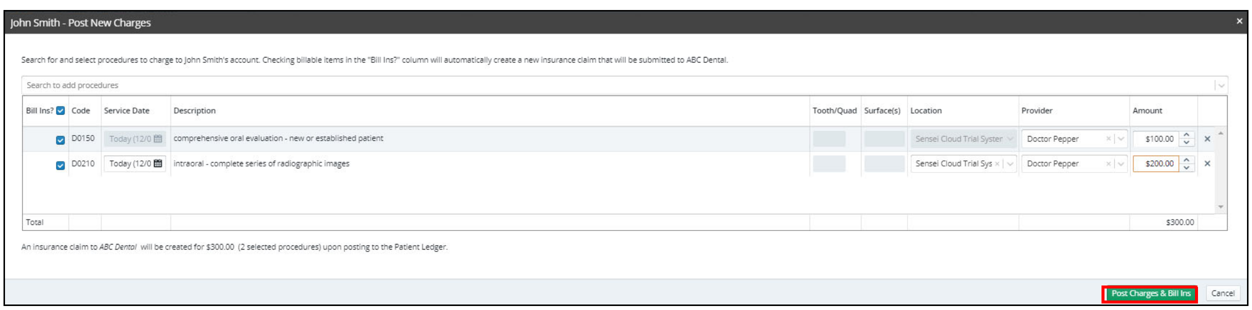
To post a charge directly to the ledger:

1 Select the patient from whom you want to post the charge.

2 Select **Financials > Ledger**. The **Ledger for** window is displayed.



3 Under **Actions**, click **New Charge.** The **Post New Charges** is displayed. .



4 In the **Search to add procedures** field, add the procedures.

5 Click **Post Charges & Bill Ins.**

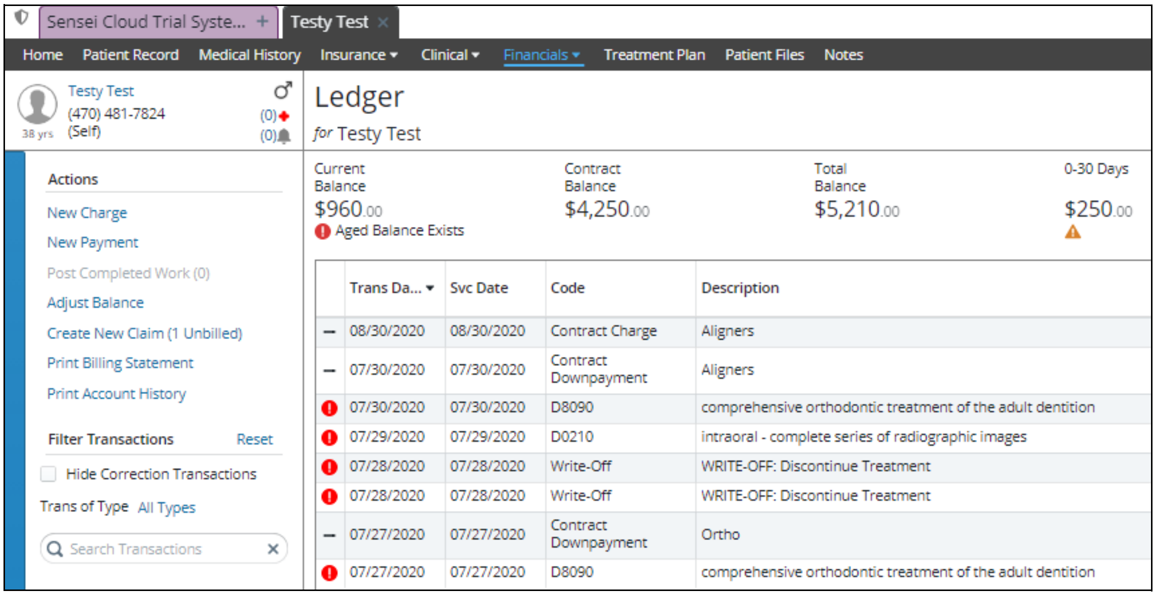
Adjusting Charges Posted in Error

Note: If the procedure is associated with an outstanding claim, cancel the claim first.

To adjust a charge posted in error to a patient's ledger:

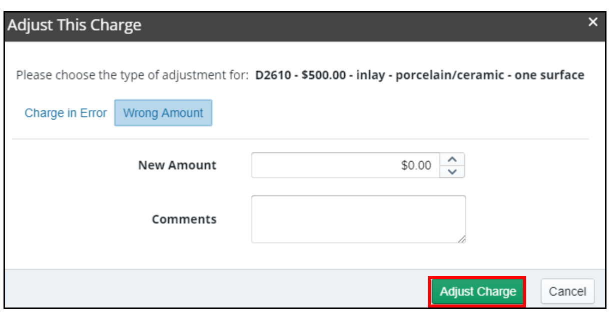
1 Find the patient for whom you want to adjust a charge and click **Patient Record** on the menu bar.

2 Select **Financials > Ledger**. The **Ledger for** window is displayed.



3 Click on the procedure line to view the charge details. The **Charge Details** window is displayed.

4 Click **Adjust This Charge** in the upper-right corner. The **Adjust This Charge** window is displayed.



5 Select **Charge in Error** or **Wrong Amount**.

Note: **Charge in Error** removes the entire charge; **Wrong Amount** enables you to enter the correct procedure fee.

6 Enter a note in the **Comments** field. This field is required.

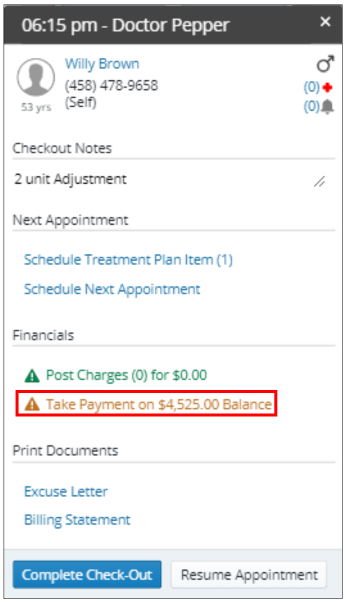
7 Click **Adjust Charge.** The original line item is adjusted, and a new line item with the corrected fee is added.

Posting Payments

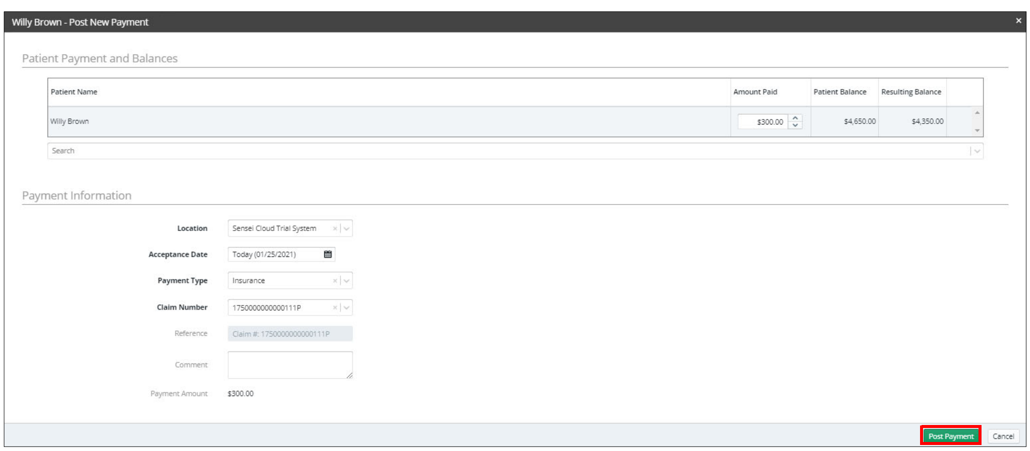
To post a payment at check out:

1 After changing the **Appointment Status** to **Complete**, the patient is placed in the **Checkout Queue**.

2 If more than one patient is displayed, click the patient you want to check out. The **Checkout** window is displayed.



3 Click **Take Payment.** The **Post New Payment** window displays the procedures attached to the appointment. In the **Search to add procedures** field, you can additional procedures. .



4 In the **Amount Paid** field, enter the amount.

5 In the **Location** field, confirm the location.

6 In **Acceptance Date** field, confirm the date.

7 From the **Payment Type** drop-down list, select the type of payment.

8 In the **Reference** field, enter a reference, if necessary; for example, **Deductible.**

Note: Text you enter in the **Reference** field is displayed on patient statements and in financial reports.

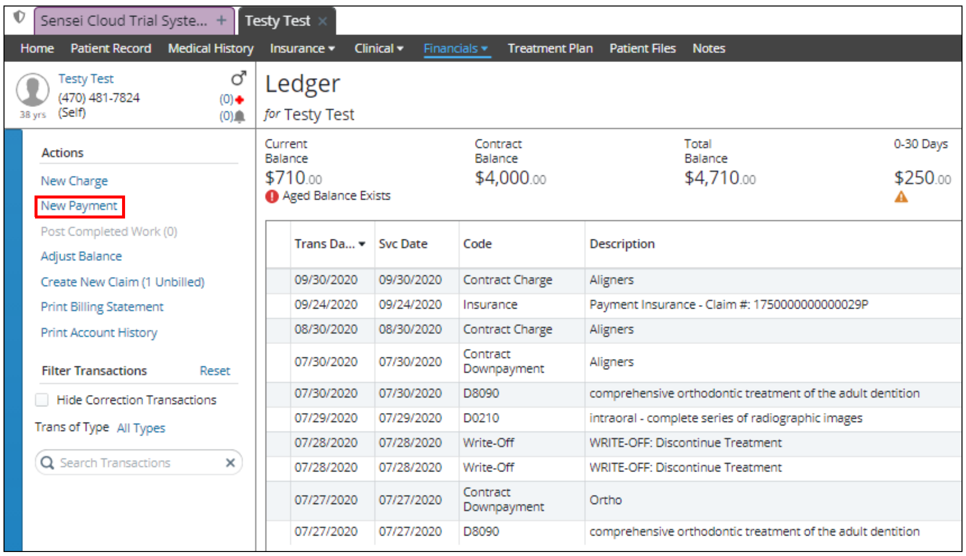
9 In the **Comments** field, enter comments, if any.

10 Click **Post Payment.**

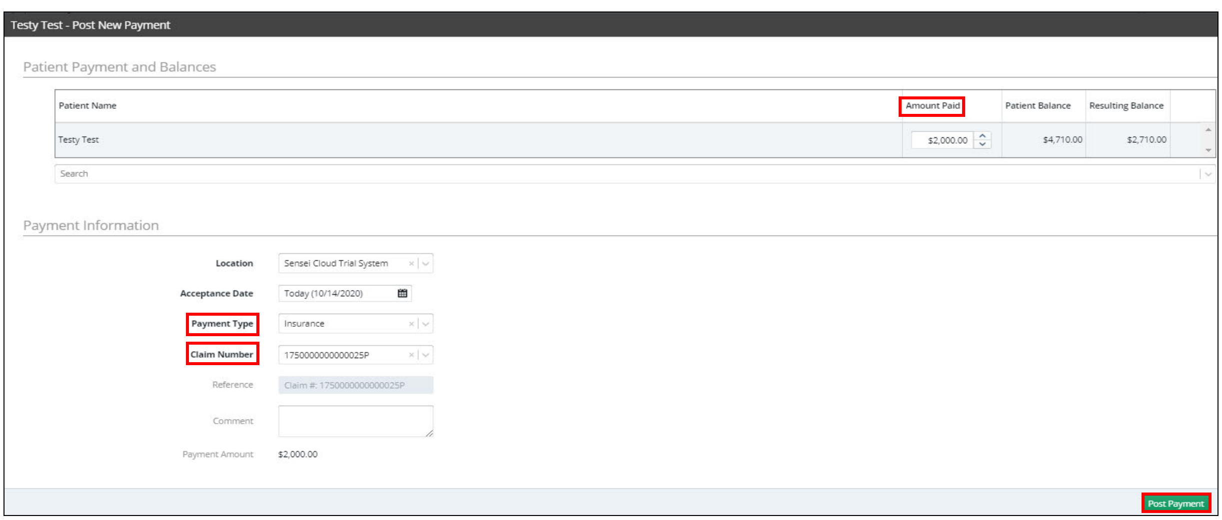
Posting Insurance Payments

To post an insurance payment:

1 In a patient's chart, select **Financials > Ledger**. The **Ledger for** window is displayed.



2 Under **Actions**, click **New Payment.** The **Post New Payment** window is displayed.



3 In the **Amount** field, enter the payment amount.

4 In the **Payment Type** field, select **Insurance.**

5 From the **Claim Number** drop-down list, select the claim.

6 In the **Comments** field, enter any additional information about the payment.

7 Click **Post Payment.**

Posting Split Payments

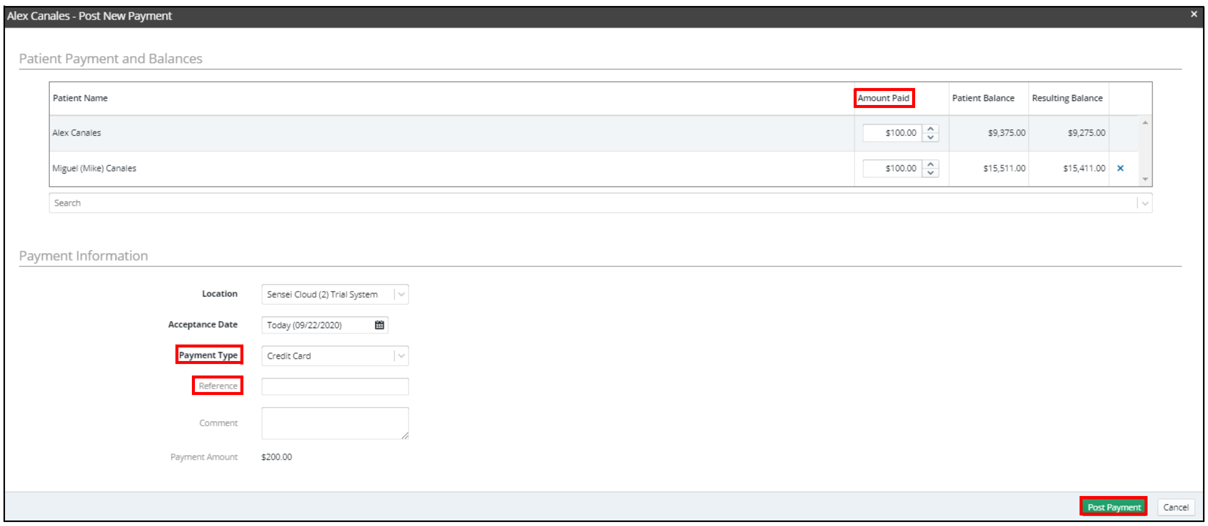
To split a payment between patients:

1 Find one of the patients for whom you want to post a payment and select **Financials > Ledger**. The **Ledger for** window is displayed.

2 Under **Actions**, click **New Payment.** The **Post New Payment** window is displayed.

3 In the **Search** field, type the name of an additional patient.

4 Select the patient. The **Post New Payment** window is displayed with all patients you have selected.



5 In **Amount Paid** field, enter the amounts for each patient.

6 In the **Location** field, confirm the location.

7 In **Acceptance Date** field, confirm the date of the payment.

8 From the **Payment Type** drop-down list, select the type of payment.

9 In the **Reference** field, enter a reference; for example, **Deductible**.

Note: Text you enter in the **Reference** field is displayed on patient statements and in financial reports.

10 In the **Comments** field, enter comments, if any.

11 Click **Post Payment**. The **Split Payment Summary** window is displayed for reference. You can select any patient to view his or her ledger.

Posting Applied Payments

For practices that pay providers based on collections, Sensei Cloud's Applied Payments functionality enables you to apply funds from posted credits to open debits, or charges. By applying payments directly to a producer's work, you can track and report on collection activities for each provider. This functionality is disabled by default. Administrative permissions are required to enable it.

You can also enable a prompt that displays the **Apply Payment** window automatically when a payment is posted, enabling a team member to distribute the funds.

When this feature is enabled, you can:

- Apply credits to open charges when posting the transaction
- Apply credits after the payment is posted
- View distribution details
- Track and report on distributions and un-applied credits in the **Applied Payments** window.

To enable the Applied Payments feature:

1 In the upper-right corner of a window, select your name and then click **Administration**. The **Administration** window is displayed.

2 Select **Practice Settings > Financial Rules**.

3 Under **Actions**, click **Edit Financial Rules**.

4 In the **This Practice Distributes Credits** field, click **Yes**.

5 To prompt users to apply posted funds to open charges, in the **Automatically Prompt to Distribute** field, click **Yes**.

Note: If you click **No**, you must select the payment from the ledger and then apply it.

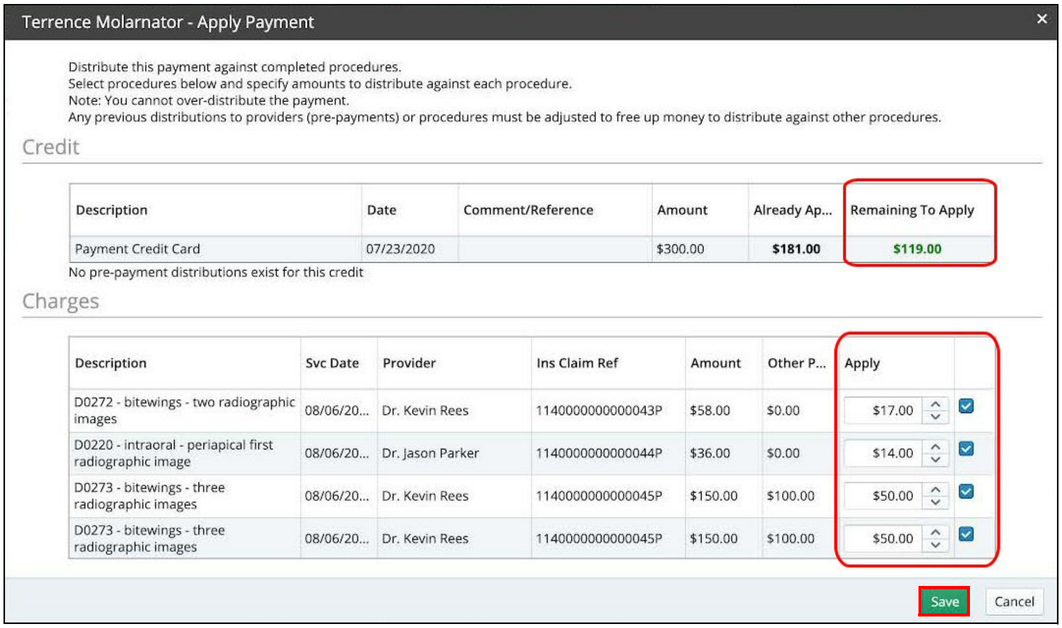
6 Click **Save**.

Note: If you select **This Practice Distributes Credits**, you enable the Pre-Payment functionality.

Applying Payments When Posting a Transaction

To apply payments when posting a transaction:

1 In the **Post New Payment** window, enter the payment information and click **Post Payment**. The **Apply Payment** window is displayed, showing the amount available to apply.



The **Other Payments** column displays any distributions already made to the charge from other credits. The **Apply** column displays any existing distributions made towards the charge from the selected credit.

Note: When distributing the funds of an insurance payment, the available charges are limited to those for the associated insurance claim.

2 Check the box next to the open charges to which you want to apply the payment.

3 Enter the amounts in the **Apply** column.

Note: You cannot over-distribute the credit's total funds or over-distribute to a debit.

4 Click **Save**.

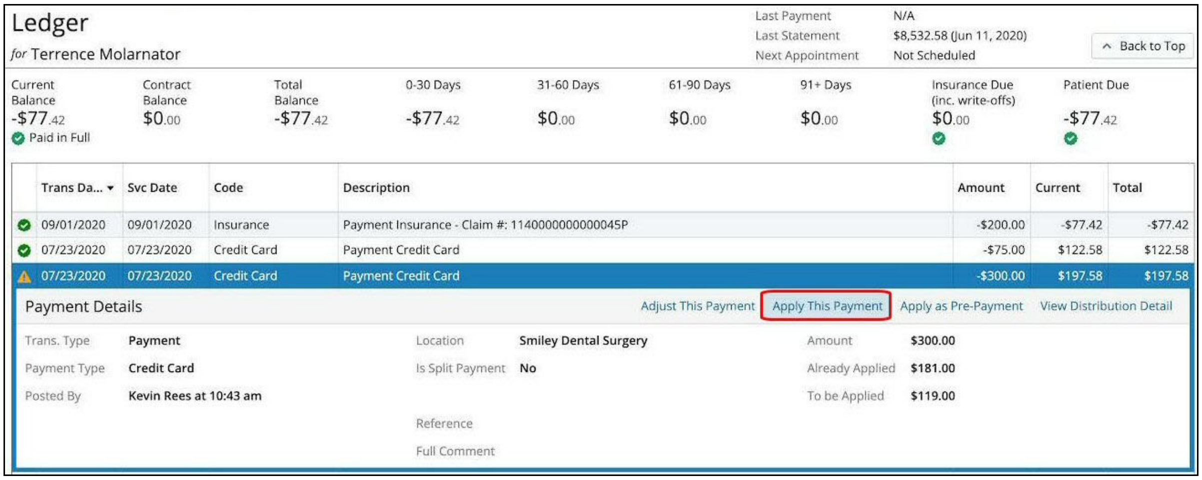
Note: You can adjust the credit's distributions at any time, adding distributions for new charges or changing existing distributions.

Applying Payments After Posting a Transaction

To apply payments after posting a transaction:

1 On a patient's tab, select **Financials > Ledger.** The **Ledger for** window is displayed.

2 Select a payment to view the details.



3 Click **Apply This Payment.** The **Apply Payment** window is displayed.

4 Check the box next to the charges to which you want to apply the payment.

5 Enter the amounts in the **Apply** column.

6 Click **Save.**

7 To view distribution details, select the payment in the ledger and click **View Distribution Detail.**

Tracking Applied and Unapplied Payments

To track applied and unapplied payments:

1 From the **Location** tab, select **Financials > Applied Payments.**

2 Do one of the following:

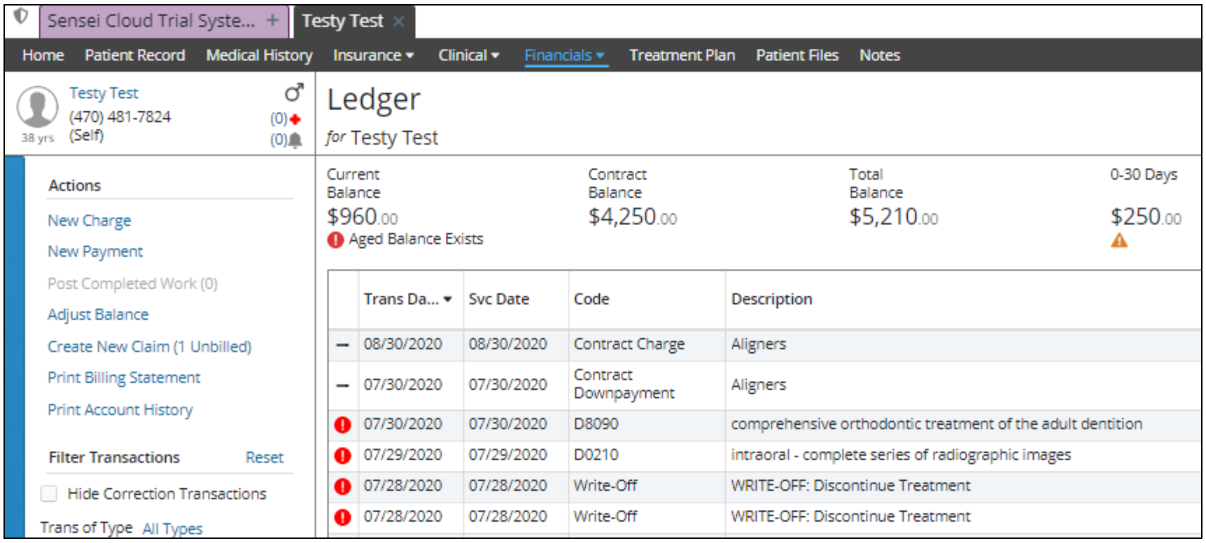
- To track applied payments, under **Actions**, click **Print Applied Payments Report.**
- To track unapplied payments, under **Actions**, click **Print Unapplied Payments Report.**

3 After the report is generated into a **.PDF** file, you can print it.

Adjusting Payments Posted in Error

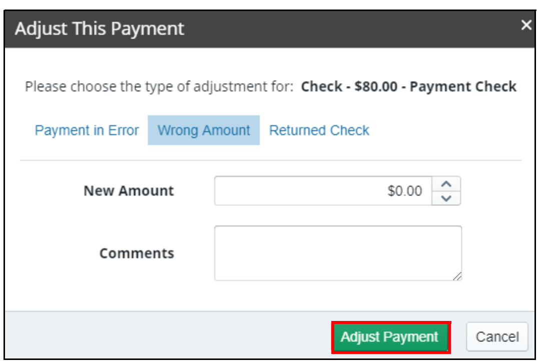
1 Find the patient for whom you want to adjust a payment and click **Patient Record** on the menu bar.

2 Select **Financials > Ledger**. The **Ledger for** window is displayed.



3 Click on the procedure line to view the payment details. The **Payment Details** window is displayed.

4 Select **Adjust This Payment** in the upper-right corner of the window. The **Adjust This Payment** window is displayed.



5 Select **Payment in Error**, **Wrong Amount**, or **Returned Check**.

Note: **Payment in Error** removes the entire payment; **Wrong Amount** enables you to enter the correct procedure fee; **Returned Check** enables you to apply an **NSF Fee** to the patient's Ledger.

6 Enter a note in the **Comments** field.

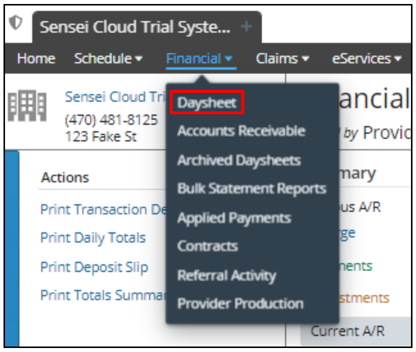
7 Click **Adjust Payment**.

Running the Final Daysheet

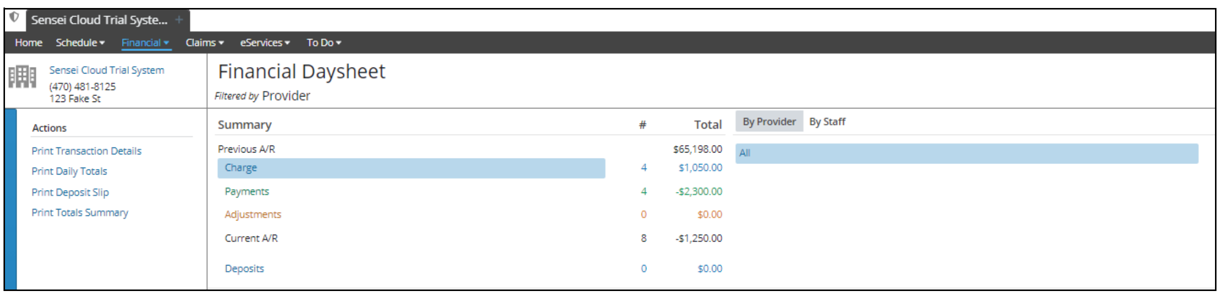
To close the day, you must run the final Daysheet.

To run the Daysheet:

1 On the location's **Home** tab, click **Financial > Daysheet.**



The **Financial Daysheet** window is displayed.



2 Verify the information in the Daysheet.

3 Click **Close the day for Location** at the bottom of the window. 

Skill Sharpeners

Exercise 1—John Smith owes $400 after his insurance company pays for his most recent treatment. Post his payment.

To post a payment:

1 With John Smith's patient record open, click **Financials.** The **Ledger for John Smith** window is displayed.

2 Under **Actions**, click **New Payment**. The **Post New Payment** window is displayed. In the **Amount Paid** field, enter **$300.00**.

3 In the **Location** field, confirm the location.

4 In the **Acceptance Date** field, confirm the current date.

5 From the **Payment Type** drop-down list, select **Credit Card.**

6 In the **Reference** field, enter a reference; for example, **Co-pay.**

7 Leave the **Comments** field blank.

8 Click **Post Payment.**

Exercise 2—You realize that you have made an error in Mr. Smith's posted payment, so you must correct it.

To correct a payment posted in error:

1 With John Smith's patient record open, click **Financials.** The **Ledger for John Smith** window is displayed.

2 Click on the payment line to view the payment details. The **Payment Details** window is displayed.

3 Select **Adjust This Payment** in the upper-right corner of the window. The **Adjust This Payment** window is displayed.

4 Select **Wrong Amount.**

5 In the **New Amount** field, enter **$400.00**.

6 In the **Comments** field, type **Corrected dollar amount posted in error**.

7 Click **Adjust Payment.**

Exercise 3—At the end of the day, you want to run the final Daysheet.

To run the Daysheet:

1 On the location's **Home** tab, click **Financials.**

2 Select **Daysheet.** The **Financial Daysheet** window is displayed.

3 Verify the information in the Daysheet.

4 Click **Close the day for Location.**

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