

SoftDent Software

Setting up Insurance Plans

This two-page job aid is designed for all dental front office team members and identifies the fields that should be completed when adding different insurance plan types to SoftDent practice management software. The information required for each insurance plan type varies when combined with different insurance estimation types.

For All Plan Types

- Set up the Bluebook with plan fees.
- From the **Patient** window, enter the Insurance ID in the **Insurance ID** field.
- Contact the Electronic services group for specific **Sub Type**.

Flat Fee Plans

- On the **Information** tab, in the **Estimation Type** field, click the arrow and select **Flat Fee**.
- On the **Information** tab, in the **Sub Type** field, click the arrow and select **Indemnity**, unless otherwise specified by the Electronic services group.
- On the **Patient** window, enter the Insurance ID in the **Insurance ID** field.

Percentage Plans

- On the **Information** tab, in the **Estimation Type** field, click the arrow and select **Percentage**.
- On the **Information** tab, in the **Sub Type** field, click the arrow and select **Indemnity**, unless otherwise specified by the Electronic services group.
- On the **Patient** window, enter the Insurance ID in the **Insurance ID** field.

PPO Plans

- On the **Information** tab, in the **Estimation Type** field, click the arrow and select either **Flat Fee PPO** or **% PPO**.
- On the **Information** tab, in the **Sub Type** field, click the arrow and select **Preferred Provider Organization**, unless otherwise specified by the Electronic services group.
- On the **Information** tab, enter the risk write-off percent.
- On the **Information** tab, select the **Post Write Off at time of service** checkbox if you want to post the write-off amount when a procedure is posted.
- On the **Patient** window, enter the Insurance ID in the **Insurance ID** field.

NOTE: Set up the Bluebook with plan fees for SoftDent software to calculate the write-off amounts or link an allowance table to the plan to create the Bluebook automatically.

Setting up Insurance Plans continued . . .

DMO Plans

- On the **Information** tab, in the **Estimation Type** field, click the arrow and select **DMO**.
- On the **Information** tab, in the **Sub Type** field, click the arrow and select **Dental Maintenance Organization**, unless otherwise specified by the Electronic services group.
- On the **Information** tab, if there is no anniversary month, select None in the **Anniversary Month** field.
- On the **Information** tab, deselect the **Maximum Coverage** checkbox if there is no maximum coverage.
- On the **Information** tab, enter the charge per visit as specified by the plan.
- On the **Coverage** tab, select each procedure code that is covered and enter each copay amount.
- On the **Claim Filing** tab, if no insurance form is required to print, deselect the **Print Form** checkbox.
- On the **Patient** window enter the Insurance ID in the **Insurance ID** field.

Medicaid Plans

- On the **Information** tab, in the **Estimation Type** field, click the arrow and select **Medicaid**.
- On the **Information** tab, in the **Sub Type** field, click the arrow and select **Medicaid**, unless otherwise specified by the Electronic services group.
- On the **Information** tab, if there is no anniversary month select None in the **Anniversary Month** field
- On the **Information** tab, deselect the **Maximum Coverage** checkbox if there is no maximum coverage.
- On the **Coverage** tab, select each procedure code range that is covered, and enter each copay amount.
- On the **Claim Filing** tab, select the **Print UCR** checkbox to print your usual fees on the claim form.
- On the **Claim Filing** tab, select the **Treat Patient as Guarantor** checkbox for the insurance claims to display the patient as the responsible party
- On the **Account** window, enter the Medicaid ID in the **Medicaid #** field.
- On the **Patient** window, enter the Insurance ID in the **Insurance ID** field.