Carestream DENTAL

Initial Training Workbook

WinOMS Practice Management Software

Your Guide to a Successful Transition

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OL250-08

WinOMS Practice Management Software

Initial Training Workbook

Notice

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Contents

About This Guide

This workbook includes the following lessons. You can review the lessons in any order.

- Navigating in the Software
- Setting Preferences
- Using the Patient Window
- Using the Scheduler
- Working with Insurance
- Working with Referrals
- Working with Prescriptions
- Using Alerts
- Using Encounter Slips
- Using EMR Consent Forms
- Using Experts
- Creating Reports

Important: When you work the exercises, do not change anything that will affect your database permanently.

Accessing This Guide Electronically

When you install WinOMS, electronic versions of this guide and related documentation are installed on your computer. To access these electronic documents:

1 On the Windows taskbar, click **Start**.

2 Select **All Programs > WinOMS > Documentation**.

3 Select a document from the drop-down list.

Note: Each time you install an update, the online documentation folder is replaced with a new folder. Do not store important files in this folder.

The electronic documents are in PDF file format and can be opened with Adobe Reader software. If Reader is not installed on your computer:

1 On the Windows taskbar, click **Start**.

2 Select **All Programs > WinOMS > Online Documentation > Install Acrobat Reader**.

3 Follow the onscreen instructions.

Related Documentation

See the *WinOMS Practice Management Software Quick Start Guide,* the *WinOMS Practice Management Software Getting Started Guide,* and the WinOMS Practice Management Software Online Help for more information.

1 Navigating in the Software

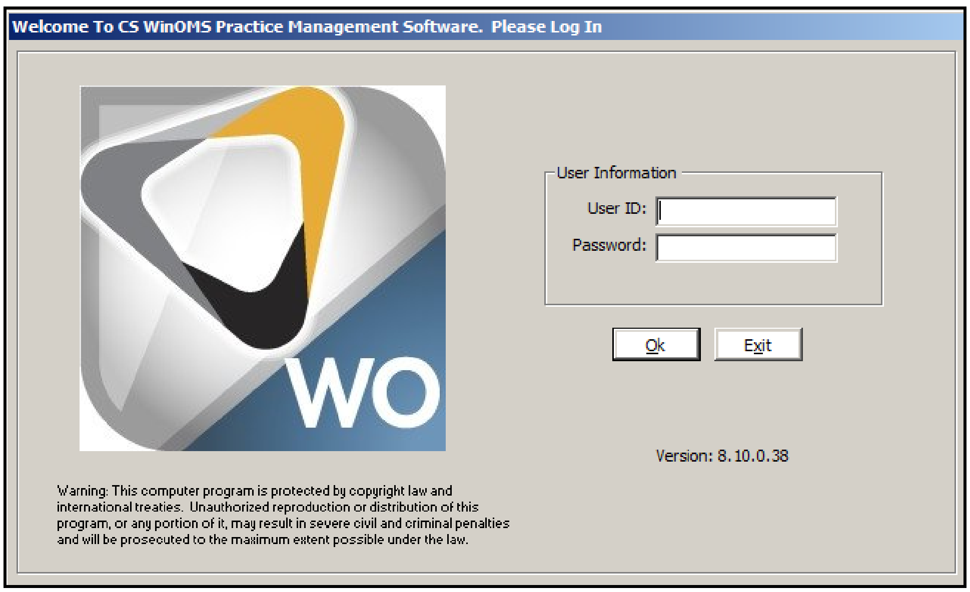
This lesson includes the following topics:

- Logging In to the Software
- Using Practice Central
- Using the Toolbar
- Logging Out of the Software

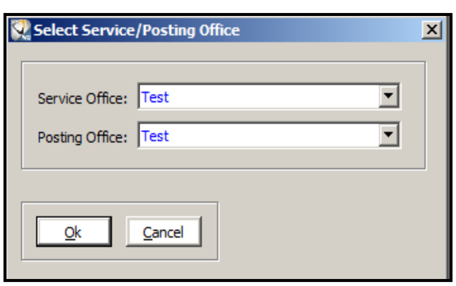
Logging In to the Software

To log in to the WinOMS software:

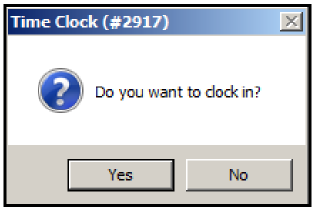
1 Double-click the **WinOMS** icon on your desktop **OR** click **Start > All Programs > WinOMS > WinOMS**. The **Log In** window is displayed.



2 Enter your user ID and password, and click **Ok.** If your practice has more than one posting office, the **Select Service/Posting Office** window is displayed.



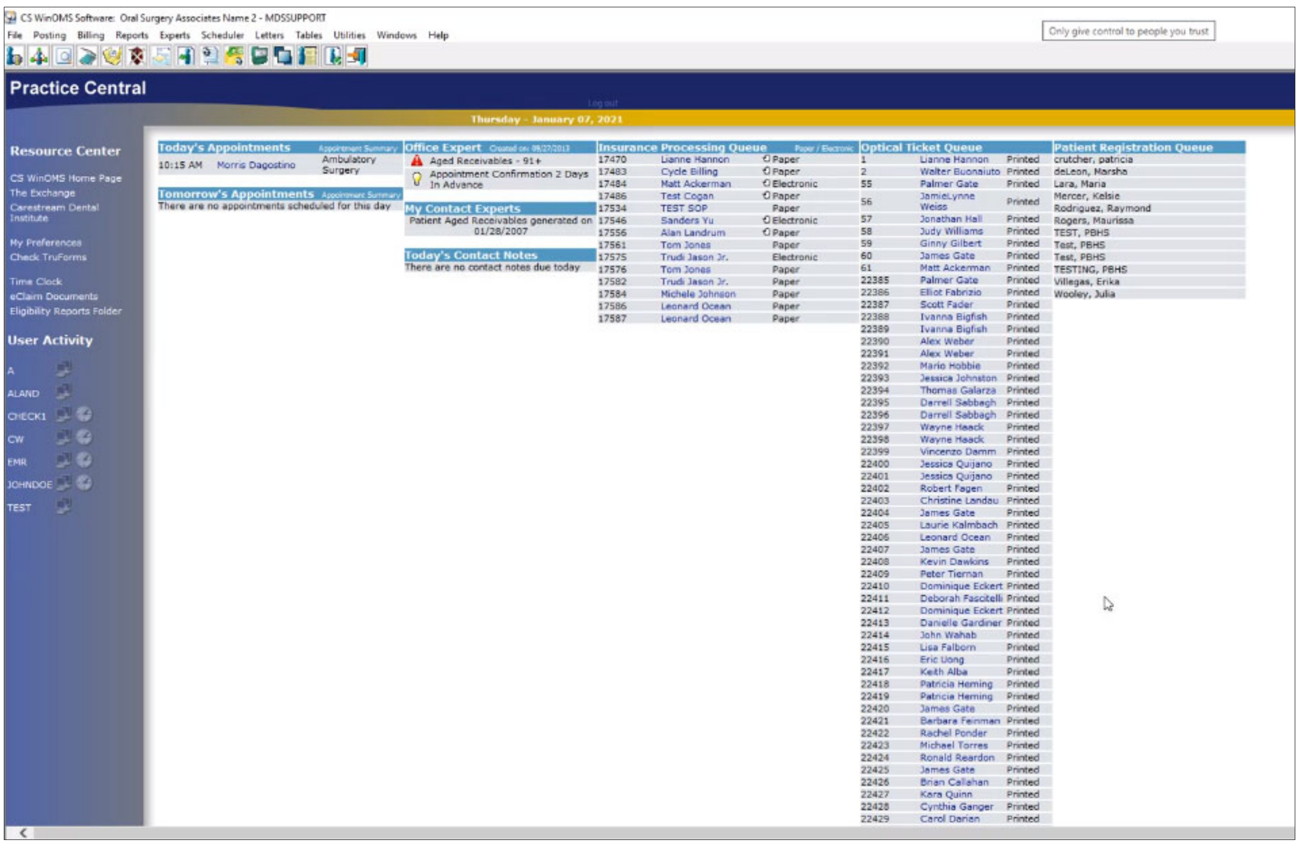
3 Select the service office and posting office, if necessary. Click **Ok.** If the Time Clock feature is enabled, the **Time Clock** window is displayed.



4 If you want to clock in, click **Yes**.

Using Practice Central

If you have enabled the Practice Central feature, the **Practice Central** window is the first thing you see.



You can customize the **Practice Central** window, including changing the layout of the window.

Note: You can add up to five columns and change the order of the columns.

Many items in the window are hyperlinks: click a link, and a related window opens. Click a patient's name, and the **Patient Workspace** is displayed.

Note: A red dot next to a patient's name indicates that the patient's account is in collections.

The **Resource Center**, on the left side of the window, has links that take you to the WinOMS home page, a list of training opportunities, and the **Practice Central Preferences** window. To customize the **Resource Center**, select **My Preferences > General Content**.

The **User Activity** section lists staff members and their current statuses. Solid icons indicate that a staff member is logged in or clocked in.

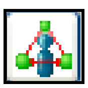
To set or change your Practice Central preferences, see Chapter 2–Setting Preferences.

Using the Toolbar

The toolbar provides access to the most commonly used features. When you move the cursor over a button, the name of the button is displayed.

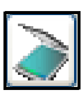
The buttons on the toolbar are:

Patients–Opens the **Patient Search** window.



Referrals–Opens the **Referral Source Search** window.

Progress Notes–Opens the **Notes/Consents Search** window.



Optical Ticket Queue–Opens the **Optical Ticket Scanning Queue** window.

Scheduler–Opens the **Appointment Scheduler** window.

Insurance–Opens the **Insurance Processing Queue** window.

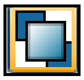
Mail Merge–Opens the **Letter Queue** window.

Recall–Opens the **Patient Recall Report** window.

Statements–Opens the **Batch Billing Statements** window.

Batch Pay–Opens the **Batch Payment** window.

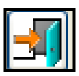
Time Clock–Opens the **Time Clock** window.



Bring to Front–Displays windows hidden behind the **Practice Central** window.

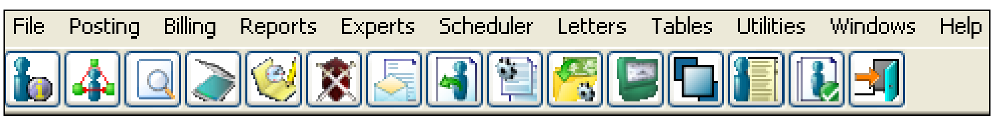
Point-of-Care–Opens the optional **Point-of-Care** module.

Registration Queue–Opens the **Pre-Registered Patients Queue** window.

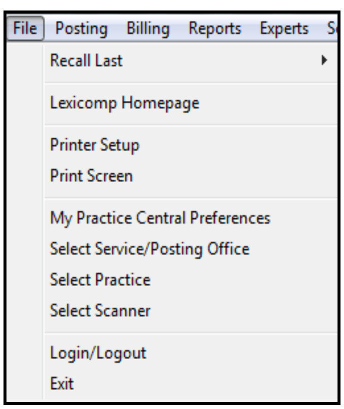


Exit–Closes the software.

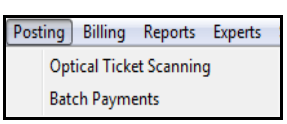
Immediately above the toolbar are these menus:



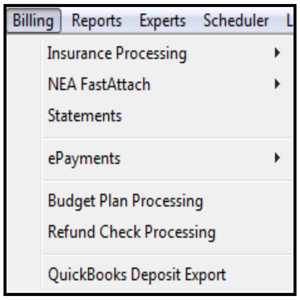
File Menu



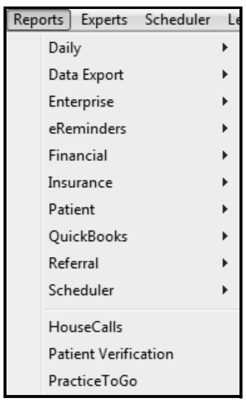
Posting Menu



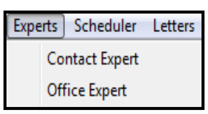
Billing Menu



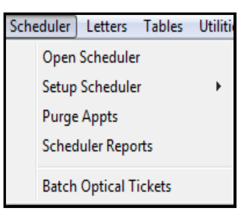
Reports Menu



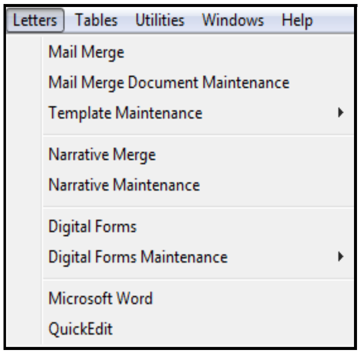
Experts Menu



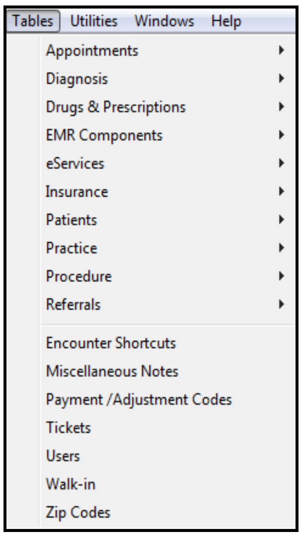
Scheduler Menu



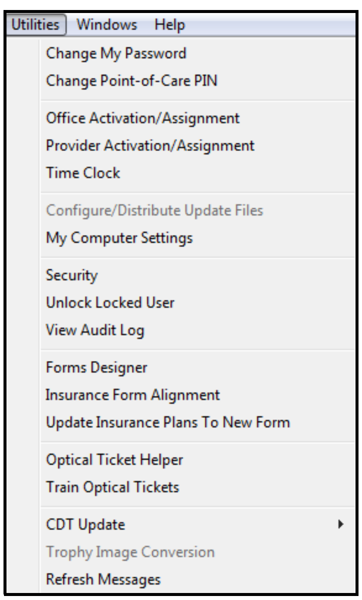
Letters Menu



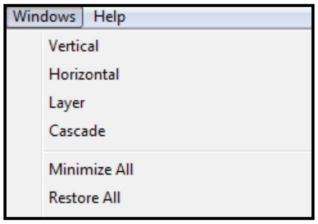
Tables Menu



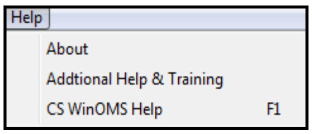
Utilities Menu



Windows Menu



Help Menu



Shortcut Menus

You can access shortcut menus by right-clicking various areas in the software. For example, in the **Appointment Scheduler** window, you can double-click an appointment, or you can right-click the appointment and select **Edit Appointment** to view and make changes to the appointment.

Logging Out of the Software

When multiple users use the same workstation, one user can log out and another can log in.

To log out of the software:

1. Select **File > Log in/Log out**. The **Time Clock** window is displayed, if your office uses the time-clock feature.
2. Click **Yes**. A confirmation message is displayed.
3. Click **Yes**.

Skill Sharpeners

Exercise 1—Log In to the WinOMS Software

To log in to the software:

1 Double-click the **WinOMS** icon. The **Log In** window is displayed.

2 Enter your user ID and password, and click **Ok.** If your practice has more than one posting office, the **Select Service/Posting Office** window is displayed.

3 Select the service office and posting office. Click **Ok.** The **Time Clock** window is displayed.

4 If your office tracks employee time using the WinOMS software, click **Yes**. The **Practice Central** window is displayed.

Exercise 2—Print Your Timesheet

To print your timesheet:

1 Click the **Time Clock** button. The **Time Clock** window is displayed.

2 Click **Print**. The **Time Clock Report** window is displayed.

3 In the **Report Criteria** section, select a department or modify the dates, if necessary.

4 In the **Options** section, select the **Show Notes** option to print any notes added to your timesheet by the administrator.

5 Select the **Total by Department** option to print the total number of hours worked by the department.

6 Under **Format**, select one of the following:

- **Show totals in HH:MM Format**—Displays totals in hours and minutes.
- **Show totals in HH:HH Format**—Displays totals in hours and hundredths of an hour.

7 Click **Print**. The **Print Time Clock Report** window is displayed.

8 Change the settings as necessary, and select one of the following:

- To print a hard copy of the report, click **Print.**
- To view the report on your computer, click **Preview.**
- To export the report to Excel, click **Export.**

Exercise 3—Add a Note to Another Person's Timesheet

Note: Only users who have administrator rights can edit time-clock data.

To add a note to someone else's timesheet:

1. Click the **Time Clock** button. The **Time Clock** window is displayed.
2. Select the name of the staff member whose timesheet you want to edit.
3. Use the left- and right-arrow buttons to switch to another week.
4. Select an entry and click **Edit**. The **Update Time Clock Item** window is displayed.
5. Select **Other - Specify Note.**
6. Type the note **This is a test.**
7. Click **Ok.**

Exercise 4—Access Help

During the log-in process, you see a message referring to docking patients. You do not know what this means. To access information about docking patients:

1. Press the **F1** key. The **WinOMS Help** window is displayed. These tabs are at the top of the window:
    - **Contents**
    - **Index**
    - **Search**
    - **Favorites**
2. Click the **Search** tab.
3. In the **Search** field, type **docking patients.**
4. Click **List Topics.** Every topic that contains **docking patients** is listed.
5. Double-click **docking patients.** The **Docking Patients** help window is displayed.
6. To print the **Docking Patients** help window, click **Print.**

Exercise 5—Change Your Password

To change your password:

1. Select **Utilities** > **Change Your Password.** The **Change Password for** window is displayed.
2. Type the data in the fields, and click **Ok.**
3. Now change the password back to the original password.

2 Setting Preferences

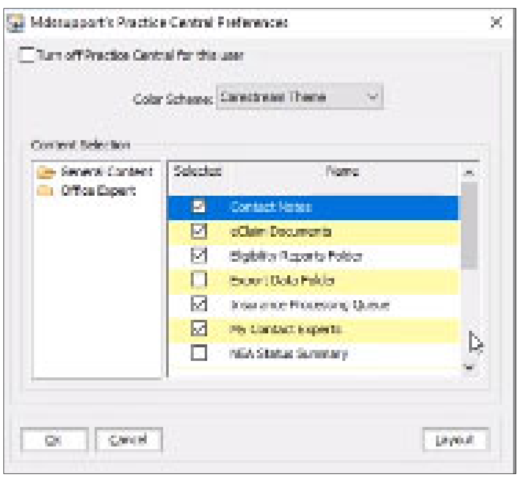
This lesson includes the following topics:

- Setting Practice Central Preferences
- Setting Practice Preferences
- Setting Office Preferences
- Setting Up Staff

Setting Practice Central Preferences

To select the content displayed in your **Practice Central** window:

1 Select **File > My Practice Central Preferences**. The **Practice Central Preferences** window is displayed.



2 In the **Color Scheme** field, select a scheme.

3 In the **Content Selection** section, click a content category.

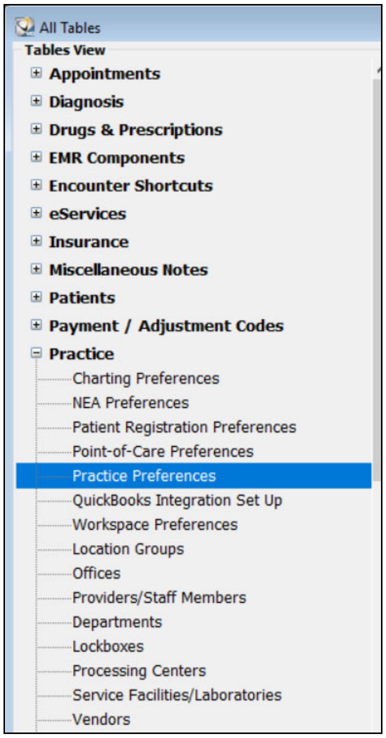
4 Select each item you want to include in your **Practice Central** window.

5 To change the number of columns displayed in the window, click **Layout.** You can display up to five columns.

6 Click **Ok.**

Setting Practice Preferences

To set preferences, select **Tables > Practice > Practice Preferences.** The **All Tables** window is displayed.



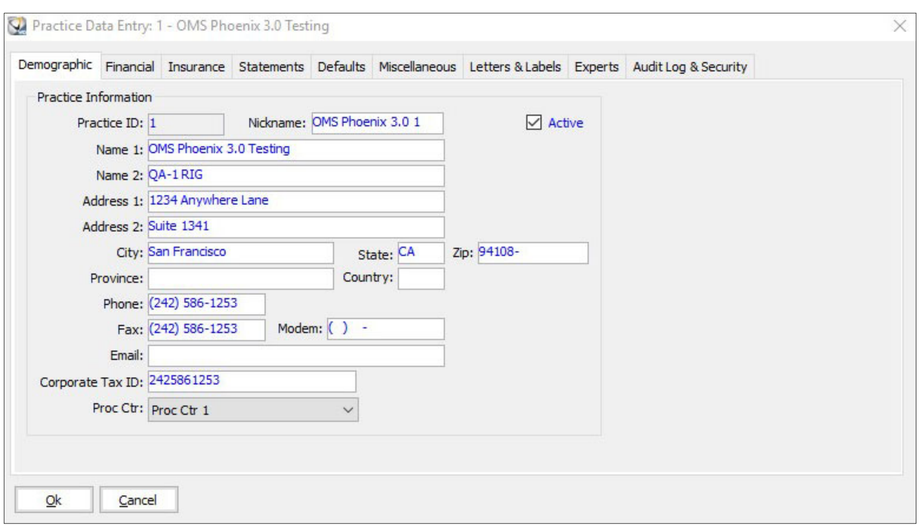
From this window, you can set up your practice.

Setting Demographics

To set demographics:

1 In the **All Tables** window, select **Practice > Practice Preferences.** The **Practice Data Entry** window is displayed.

2 Click the **Demographic** tab. The **Demographic** window is displayed.



3 Set the practice name, address, telephone number, and tax ID.

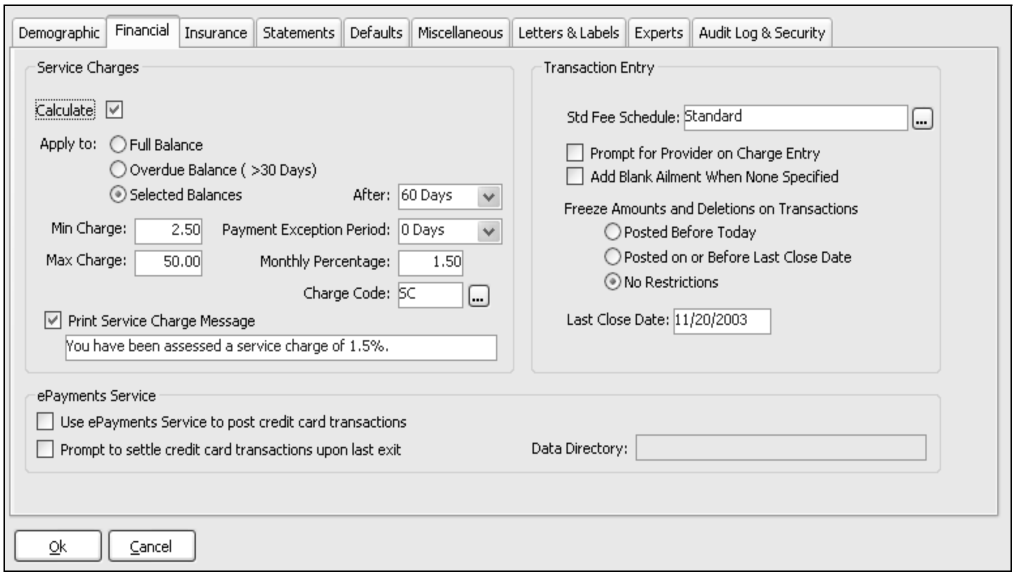
4 Click **OK**.

Setting Financial Preferences

To set financial preferences:

1 In the **All Tables** window, select **Practice > Practice Preferences**. The **Practice Data Entry** window is displayed.

2 Click the **Financial** tab. The **Financial** tab window is displayed.



3 In the **Service Charges** section, indicate how you want to calculate service charges:

- **Calculate**–Calculates service charges automatically. If you do not want them calculated, deselect this option.
- In the **Apply to** section, select an option:
  - **Full Balance**–Calculates service charges on everything owed.
  - **Overdue Balance**–Calculates service charges only for an amount that is more than 30 days old.
  - **Selected Balances**–Calculates service charges on balances that are older than the number of days specified in the **After** field.
- **After**–Select a number from the drop-down list. This is the number of days an account must be overdue before a service charge is applied.
- **Print Service Charge Message**–Prints a message on statements about the service charge.
- **Min Charge**–Type the minimum service charge that can be applied.
- **Max Charge**–Type the maximum service charge that can be applied.
- **Payment Exception Period**–Select the number of days for a grace period.

- **Monthly Percentage**–Type the percentage used to calculate service charges. Two percent should be entered as 2.0, not .02.
- **Charge Code**–Type a procedure code to be used for service charges or click the ellipsis and select from the list.

4 Use the **Electronic Credit Card Processing** section only if you are using the electronic card processing service.

5 Use the **Transaction Entry** section to indicate your fee schedule preferences:

- **Std Fee Schedule**–Select the fee schedule you want to use.
- **Prompt for Provider for Charge Entry**–To add provider information before posting procedures.
- **Freeze Amounts and Deletions on Transactions**–Select one of these options:
  - **Posted Before Today**–To prevent any changes to transactions that occurred before today.
  - **On or Before Last Close Date**–To allow changes on transactions that occurred since the last close date.
  - **No Restrictions**–To edit transactions regardless of when they occurred.
- **Last Close Date**–Enter your last closing date.

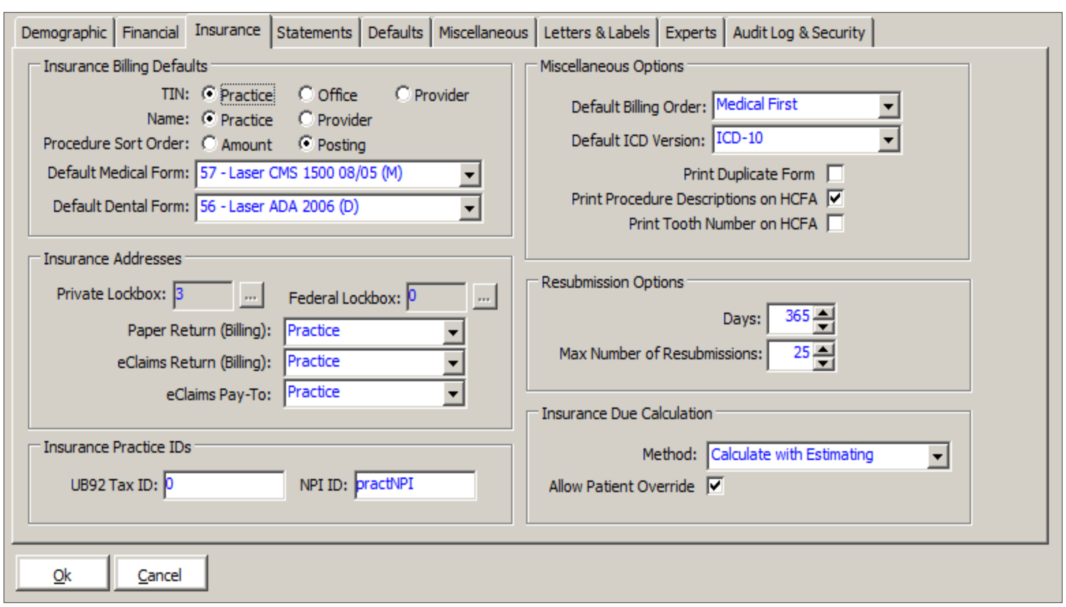
6 Click **OK**.

Setting Insurance Preferences

To set insurance preferences:

1 In the **All Tables** window, select **Practice > Practice Preferences**. The **Practice Data Entry** window is displayed.

2 Click the **Insurance** tab. The **Insurance** tab window is displayed.



3 In the **Insurance Form Options** section:

- **TIN**–Select **Practice**, **Office**, or **Provider**.
- **Name**–Select **Practice** or **Provider.**
- **Procedure Sort Order**–Select **Amount** to sort claims by amount; select **Posting** to sort claims by date.
- **Default: Medical Form**–Select a medical insurance form.
- **Default: Dental Form**–Select a dental insurance form.

4 In the **Insurance Addresses** section:

- **Private Lockbox** or **Federal Lockbox**–To use lockboxes, you must set them up in **Tables > Practice > Lockboxes.**
- **Paper Return (Billing)**–Select **Practice**, **Office**, **Central Proc Ctr**, or **Lockbox.**
- **eClaims Return (Billing)**–Select **Practice**, **Office**, or **Central Proc Ctr**.
- **eClaims Pay-To**–Select **Practice**, **Office**, **Central Proc Ctr**, or **Lockbox.**

5 In the **Insurance Practice IDs** section:

- **UB92 Tax ID**–If the plan does not accept UB-92 billing, leave this field blank.
- **NPI ID**–Add this number.

6 In the **Miscellaneous Options** section:

- **Default Billing Order**–Select **Medical first** or **Dental first.**
- **Default ICD Version**–Select **ICD-9** or **ICD-10.**
- **Print Duplicate Form**–Select if you want to print duplicate insurance forms.
- **Print Procedure Descriptions on HCFA**–Select if you want a description to be displayed.
- **Print Tooth Number on HCFA**–Select if you want the tooth number to be displayed.

7 In the **Resubmission Options** section:

- **Days**–Select the maximum number of days you are allowed to resubmit claims.
- **Max Number of Resubmissions**–Select the maximum number of resubmissions allowed per claim.

8 In the **Insurance Due Calculation** section:

- **Method**–Select one of these options:
  - **Do Not Calculate**–To track the entire balance as patient responsibility.
  - **Calculate with Estimating**–To separate patient and insurance responsibility using insurance estimating.
  - **Calculate without Estimating**–To track the entire amount as insurance responsibility until the insurance payment is received.

- **Allow patient override**–To override the **Insurance Due Calculation** method for an individual patient.

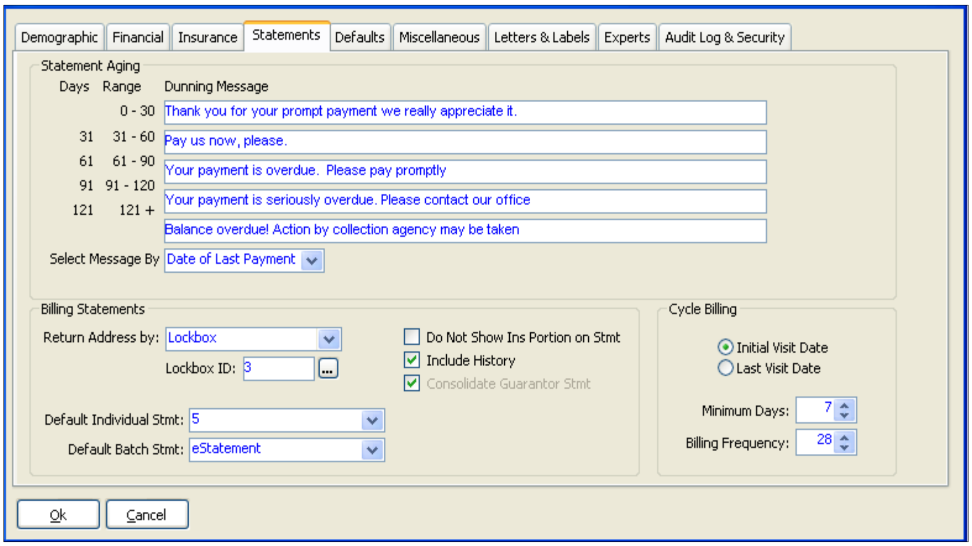
9 Click **OK**.

Setting Statement Preferences

To set statement preferences:

1 In the **All Tables** window, select **Practice > Practice Preferences**. The **Practice Data Entry** window is displayed.

2 Click the **Statements** tab. The **Statements** tab window is displayed.



3 In the **Statement Aging** section:

- **Dunning Message**–Type the message to print on the billing statement according to the age of the balance.
- **Select Message by**–Select **Aging of Account** or **Date of Last Payment**.

4 In the **Billing Statements** section:

- **Return Address by**–Select a return payment address.
- **Do Not Show Ins Portion on Stmt**–Bills the entire balance to the patient, regardless of payment responsibility.
- **Include History**–Prints the transaction history on the statement.
- **Consolidate Guarantor Stmt**–Prints all outstanding transactions on one statement for which the guarantor is responsible.
- **Min Cycle Billing Days**–If you are using cycle billing, enter the minimum number of days since treatment for a patient to receive a statement.
- **Max Cycle Billing Days**–If you are using cycle billing, enter the maximum number of days since the last statement for a patient to receive another statement.

- **Default Individual Statement Type**–Select a format for printing individual statements.
- **Default Batch Statement Type**–Select a format for printing batch statements.

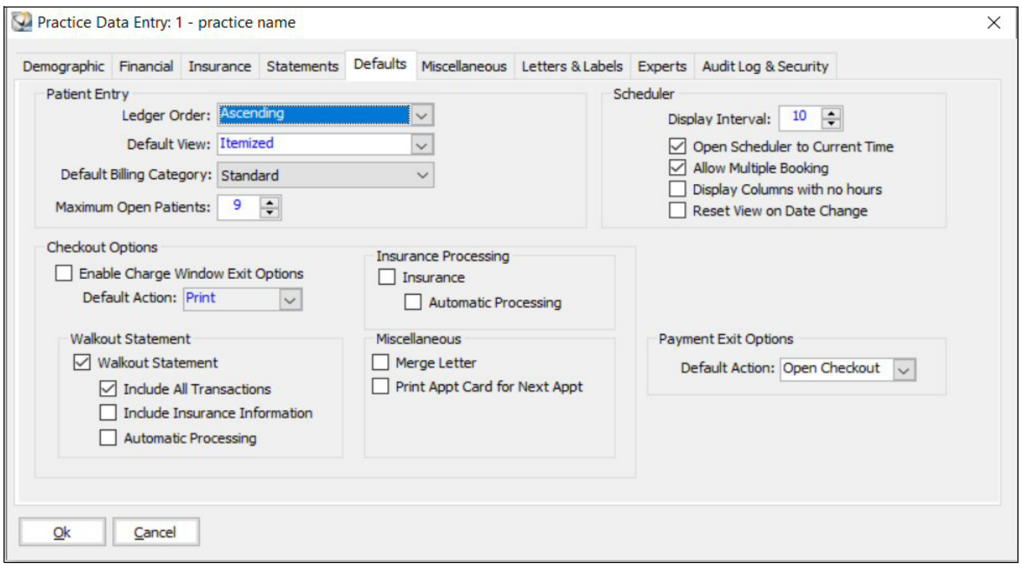
5 Click **OK**.

Setting Defaults

To set or change system defaults:

1 In the **All Tables** window, select **Practice > Practice Preferences**. The **Practice Data Entry** window is displayed.

2 Click the **Defaults** tab. The **Defaults** tab window is displayed.



3 In the **Patient Entry** section:

- **Ledger Order**–Select **Ascending** or **Descending**.
- **Default View**–Select **Open Item**, **Itemized**, or **Claims**.
- **Default Billing Category**–Select the ledger.

4 In the **Checkout Options** section:

- **Enable Change Window Exit Options**–Enables the exit option on the **Visit** tab in the **Charge** window.
- **Default Action**–Select **No Processing**, **Post Pay/Adj**, or **Print**.
- **Print Walkout Statement**–Prints walkout statements. Select from these options:
  - **Include Insurance Information**–Prints procedure codes and diagnosis codes on walkout statements.
  - **Include All Transactions**–Includes payments and adjustments in the itemized portion of the walkout statement.
  - **Process Walkout Automatically**–Prints the walkout statement automatically at checkout.

- **Print Insurance Form**–Prints insurance forms. You can select the **Process Insurance Automatically** option.
- **Merge Letter**–Selects the **Letter** option automatically at time of checkout.

5 In the **Scheduler** section:

- **Display Interval**–Selects the length of time for appointment units.
- **Open Scheduler to Current Time**–Opens the appointment book to the current time when you open the Scheduler.
- **Allow Multiple Booking**–Allows booking multiple patients at the same time.
- **Display Columns with no hours**–Displays Scheduler columns that have no open hours.
- **Reset View on Date Change**–Displays your full office hours when you change the date, rather than the current time.

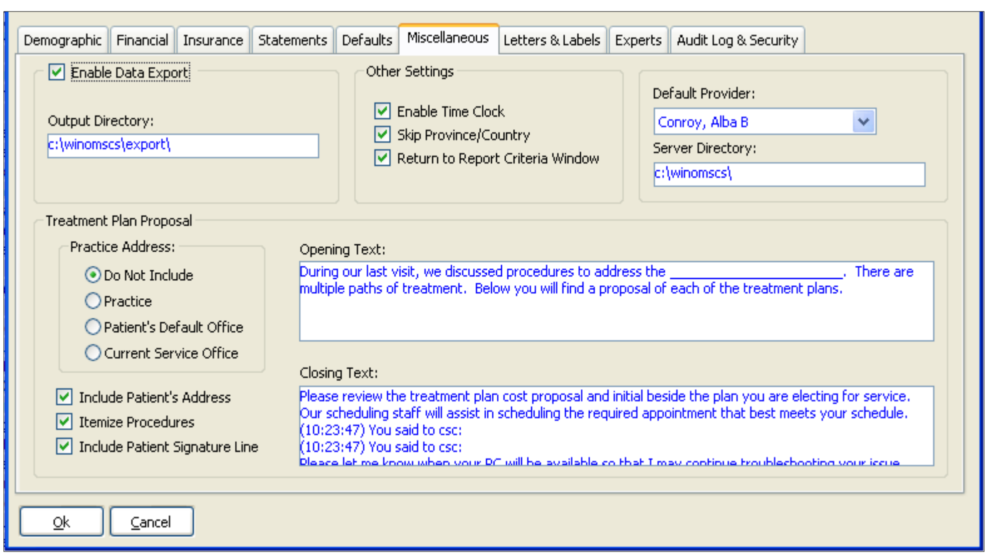
6 Click **OK**.

Setting Miscellaneous Preferences

To set miscellaneous preferences:

1 In the **All Tables** window, select **Practice > Practice Preferences**. The **Practice Data Entry** window is displayed.

2 Click the **Miscellaneous** tab. The **Miscellaneous** tab window is displayed.



3 In the **Other Settings** section, select **Enable Time Clock** to enable the time clock feature.

4 **Skip Province/Country**–Select to skip the **Province** and **Country** fields when entering address data.

5 **Default Provider**–Select a provider.

Setting Letter and Label Preferences

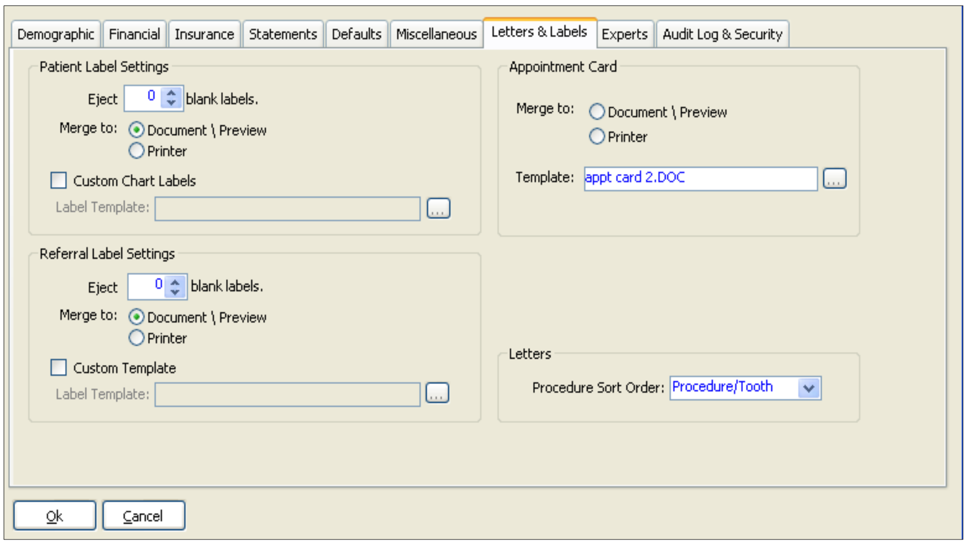
You can customize labels and set up referral labels.

Setting Up Customized Labels

To set up customized labels:

1 In the **All Tables** window, select **Practice > Practice Preferences**. The **Practice Data Entry** window is displayed.

2 Click the **Letters & Labels** tab. The **Letters & Labels** tab window is displayed.



3 In the **Eject blank labels** field of the **Patient Label Settings** section, select the number of blank labels to eject from your label printer.

4 In the **Merge to** field, select an option:

- **Document\Preview**–To preview the labels before printing.
- **Printer**–To send labels directly to the printer.

5 Select **Custom Chart Labels** to use customized labels. If the **Label Template** field is activated, click the ellipsis and **Display All**. Select the template you want.

6 Click **Ok**.

Adding Referral Label Settings

To add referral label settings:

1 In the **All Tables** window, select **Practice > Practice Preferences**. The **Practice Data Entry** window is displayed.

2 Click the **Letters & Labels** tab. The **Letters & Labels** tab window is displayed.

3 In the **Eject blank labels** field, select the number of labels to eject after printing, if you use standard labels.

4 In the **Merge to** field, select an option:

- **Document\Preview**–To preview the labels before printing.
- **Printer**–To send the labels to the printer.

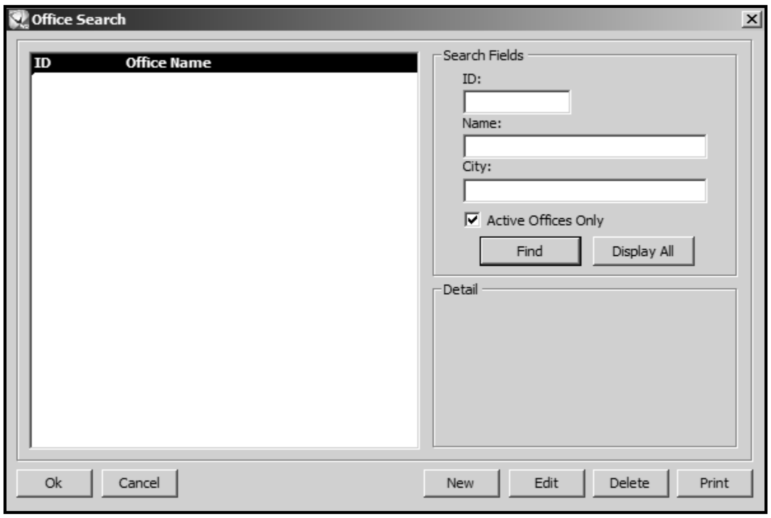
5 Select **Custom Template** to use a customized template. If the **Label Template** field is activated, click the ellipsis and **Display All**. Select the template you want.

6 Click **Ok**.

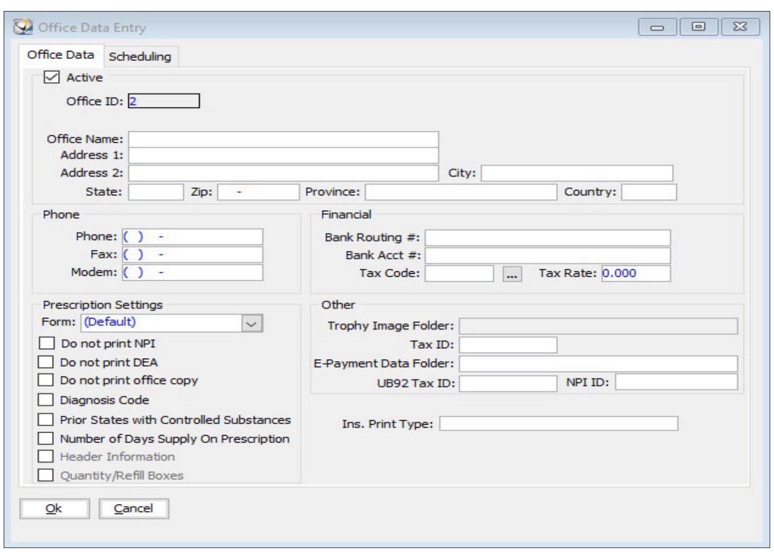
Setting Office Preferences

If your practice has multiple offices, each office must be set up in the software. To set up your offices:

1 Click **Tables** and select **Practice > Offices**. The **Office Search** window is displayed.



2 Click **New**. The **Office Data Entry** window is displayed.



3 Select or type information in the fields and click **Ok**.

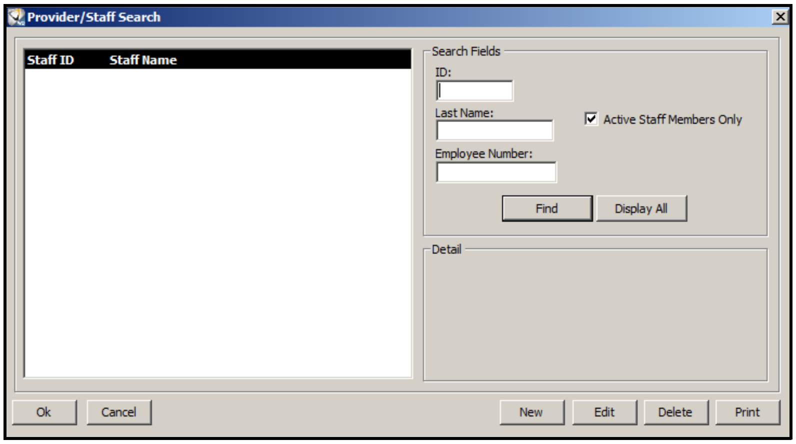
Setting Up Staff

When new providers or staff are added to your office or when information about current staff has changed, you must change or delete the information.

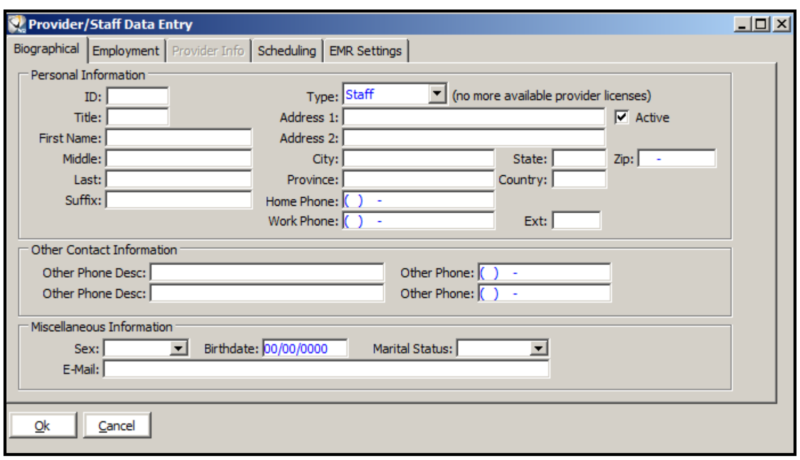
Adding Staff Information

To add a new person to your office:

1 Click **Tables** and select **Practice > Providers/Staff Members**. The **Provider/Staff Search** window is displayed.



2 Click **New**. The **Provider/Staff Data Entry** window is displayed.



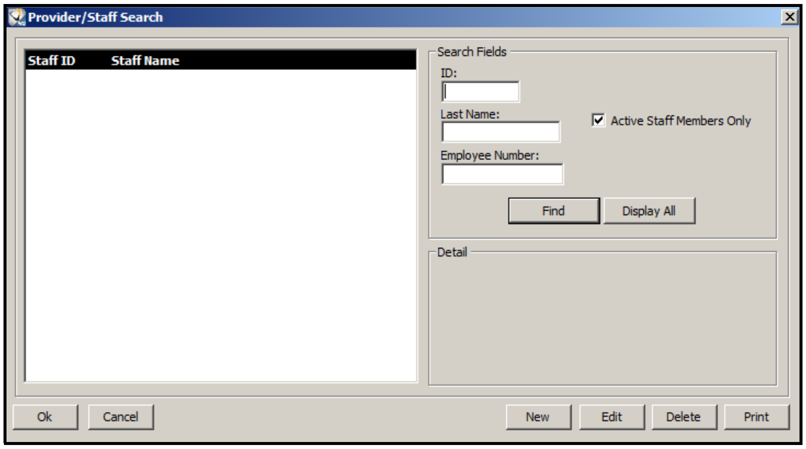
3 Fill in information on the **Biographical**, **Employment**, **Provider Info**, and **Scheduling** tabs.

Note: The **Provider** tab is not active unless **Provider** is selected on the **Biographical** tab.

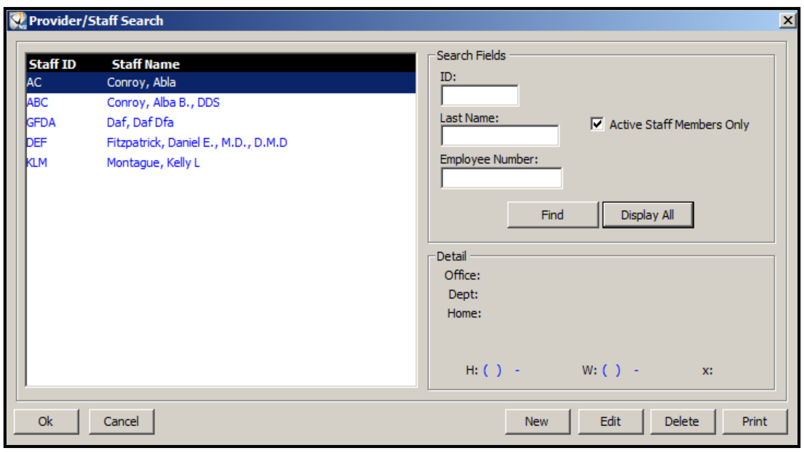
Editing Staff Information

To edit information about a current provider or staff member:

1 Click **Tables** and select **Providers/Staff Members.** The **Provider/Staff Search** window is displayed.



2 Click **Display All.**



3 Select the staff member you want and click **OK.** The **Provider/Staff Data Entry** window is displayed.

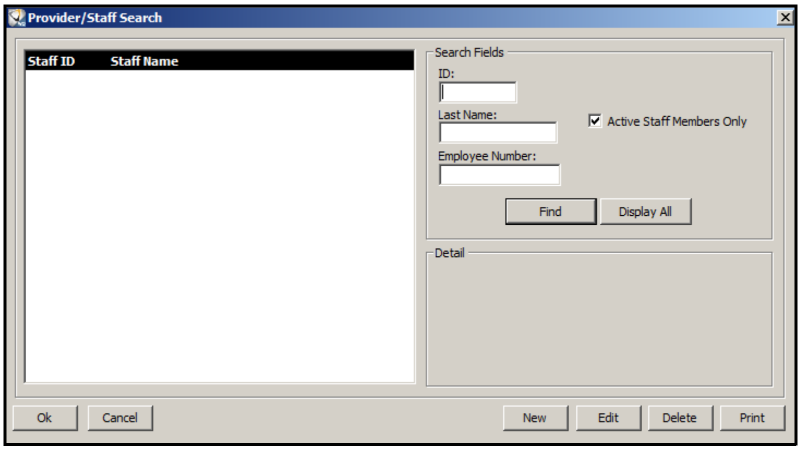
4 Edit the information and click **OK.**

Deleting Staff Members

When patients or records are associated with a provider or staff member, the person cannot be deleted from the software. If a person has been entered incorrectly or has never performed a function in the software, the person can be deleted.

To delete a provider or staff member:

1 Click **Tables** and select **Practice > Providers/Staff Members**. The **Providers/Staff Search** window is displayed.



2 Click **Display All.**

3 Select the provider or staff member you want, and click **Delete.** A confirmation message is displayed.

4 Click **Yes.**

Skill Sharpeners

Exercise 1—Change the Color Scheme of Practice Central

To change the color scheme of the **Practice Central** window:

1 Select **File > My Practice Central Preferences**. The **Practice Central Preferences** window is displayed.

2 Select a color from the **Color Scheme** drop-down list.

3 Click **Ok**.

Exercise 2—Calculate Service Charges Automatically

To see if your software calculates service charges automatically:

1 Click **Tables** and select **Practice > Practice Preferences.** The **Practice Data Entry** window is displayed.

2 Click the **Financial** tab. The **Financial** tab window is displayed.

3 Look at the **Service Charges** section. Is the **Calculate** checkbox checked? If it is, the software calculates service charges automatically.

Exercise 3—Print Walkout Statements Automatically

To set up the software to print walkout statements automatically:

1 Click **Tables** and select **Practices > Practice Preferences.** The **Practice Data Entry** window is displayed.

2 Click the **Defaults** tab. The **Defaults** tab window is displayed.

3 In the **Checkout Options** section, select the **Walkout Statement** and **Automatic Processing** options.

4 Click **Ok.**

3 Using the Patient Window

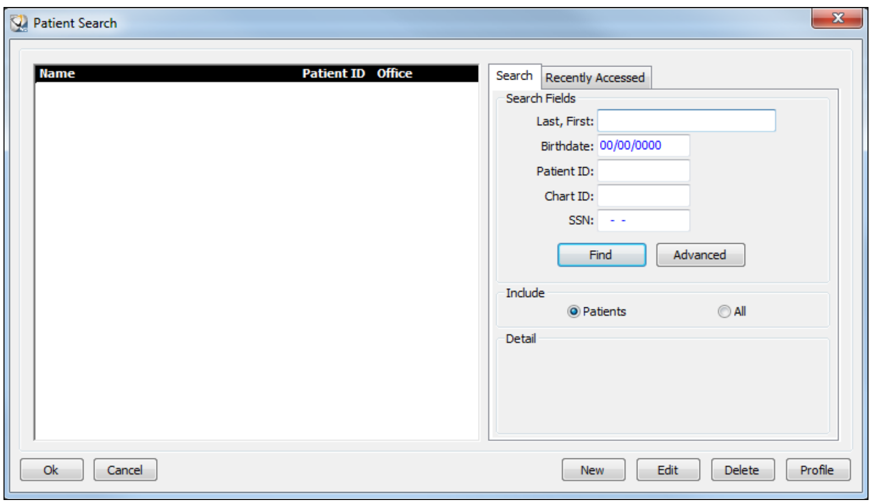
This lesson includes the following topics:

- Accessing the Patient Window
- Using the Patient Window
- Docking Patient Records
- Adding New Patients

Accessing the Patient Window

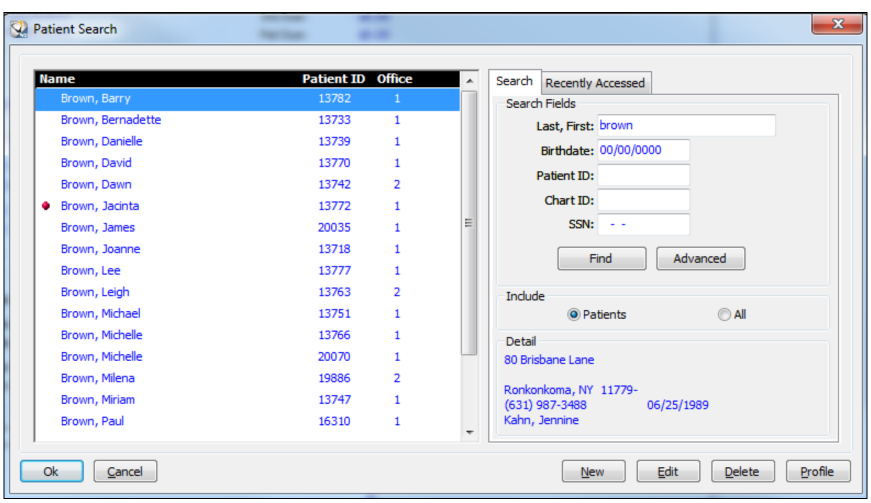
To access the **Patient** window:

1 Click the **Patients** icon on the toolbar**.** The **Patient Search** window is displayed.

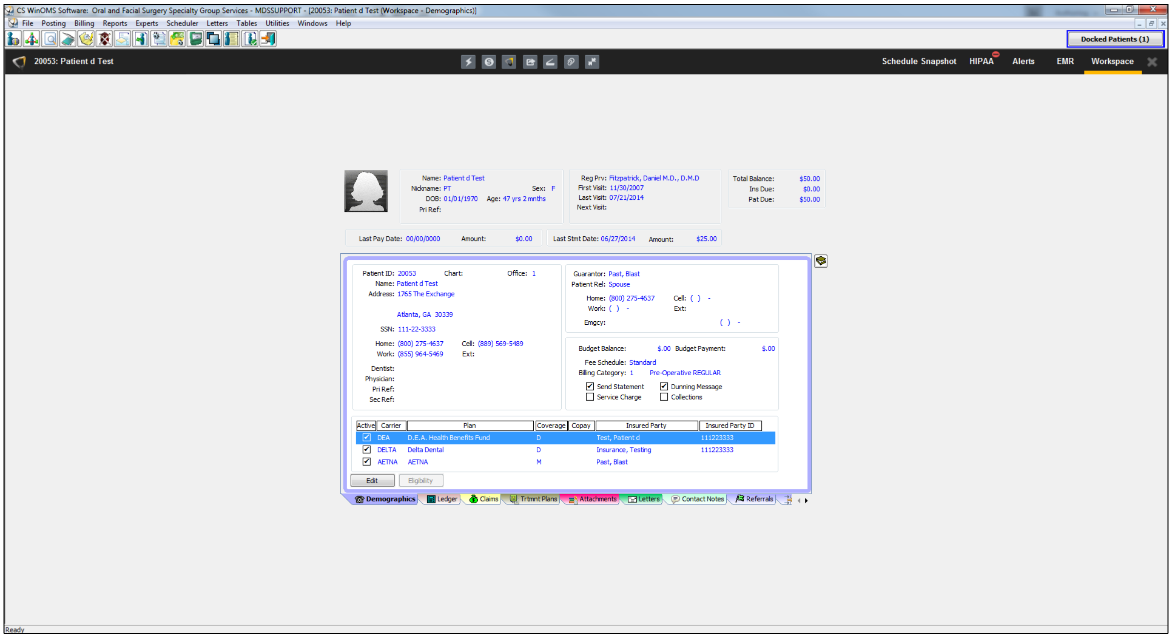


2 Enter the first three letters of the patient's last and first names in the **Last, First** field.

3 Click **Find.** A list of patients is displayed.

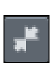


4 Select the patient you want, and click **Ok.** If alerts exist, they are displayed. Otherwise, the **Patient** window is displayed.



Using the Patient Window

The **Patient** window opens to the workspace or the EMR, depending on the window that was open when you last exited. At the top of the window are the main menu, the patient's name, and the following icons:

- **–Charges**
- **–Pay/Adj**
- **–OMS Imaging**
- **–Checkout**
- **–Scan Image**
- **–Attach Document**
- **–Minimize Patient to Dock**

The workspace contains general office functions related to the patient. The tabs at the bottom of the active workspace include:

- **Demographics**
- **Ledger**
- **Claims**
- **Trtmnt Plans**
- **Attachments**
- **Letters**

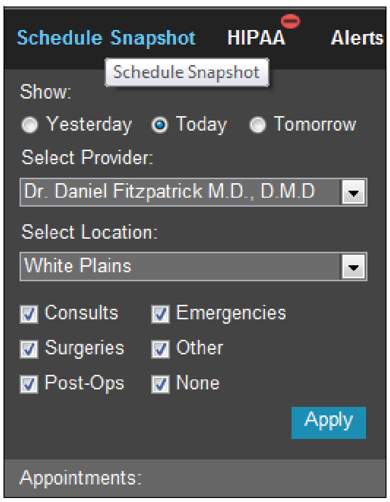
- **Contact Notes**
- **Referrals**
- **Referral Activity**

In addition to **Workspace**, these buttons are in the upper-right of the window:

- **Schedule Snapshot**
- **HIPAA**
- **Alerts**
- **EMR**

Schedule Snapshot

Click **Schedule Snapshot** to get a quick view of the day's schedule by day, provider, and location.



Use the filters to narrow the view by appointment type, and click **Apply.** The appointments matching the criteria are displayed.

HIPAA

Click **HIPAA** for a quick view of the patient's HIPAA status and the following list of contact options:

- **Leave VM**
- **Send SMS**
- **Talk w/Family member**
- **Send E-Mail**

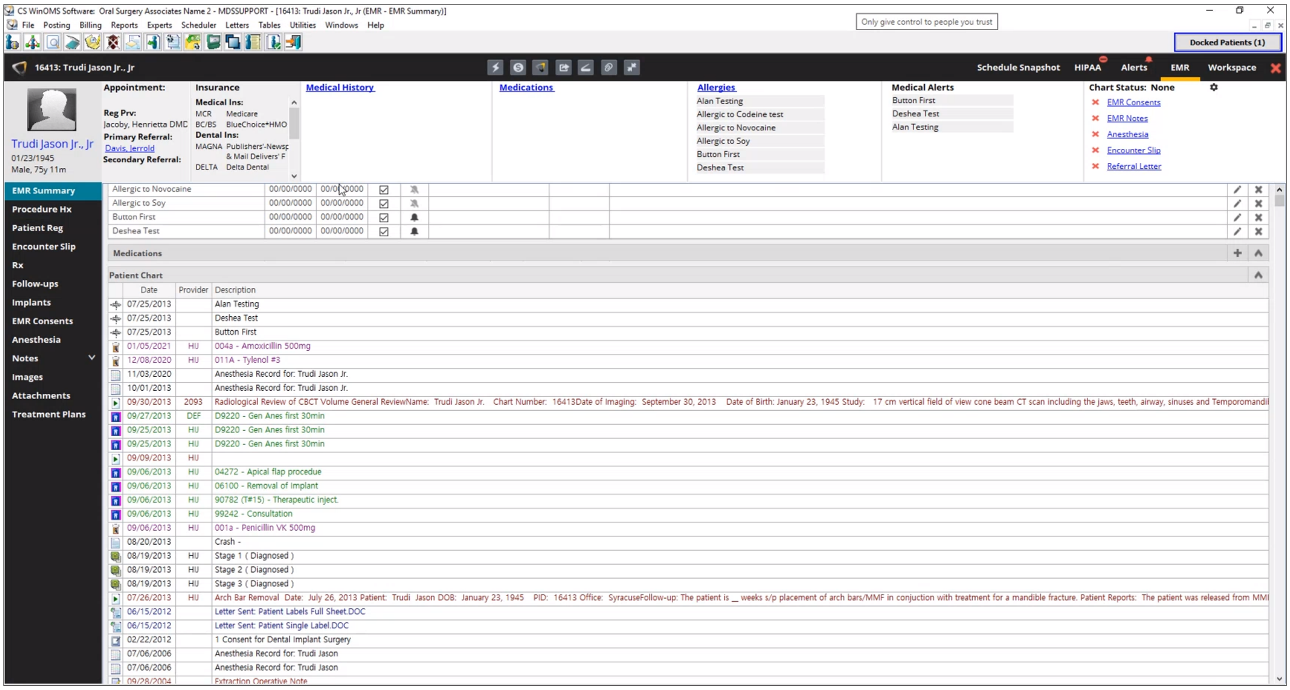
To set these preferences, in the **Workspace** window, click the **Demographics** tab and then click **Edit.** The **Patient Data Entry** window is displayed. Click the **Extended** tab, select the **HIPAA** options, and click **Ok.**

Alerts

Click **Alerts** to display the **Alerts** window for the patient. For more information, see "Using Alerts."

EMR

The **EMR** (Electronic Medical Records) window displays a patient's clinical information. Use the EMR features to access and enter medical and surgical histories, procedures, allergies, prescriptions, and progress notes; and to manage treatment plans, clinical images, and documents.



Move the cursor into the demographics area and right-click, and the following menu is displayed.

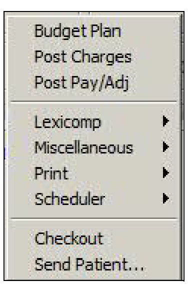


Chart Status

The **Chart Status** displays a list of elements to complete and track for the patient's current appointment:

- **EMR Consents**
- **EMR Notes**
- **Anesthesia**
- **Encounter Slip**
- **Referral Letters**

✖ –Indicates the element needs action.

✔ –Indicates the element is complete.

Tip: Click ⚙ to configure the **Chart Status** settings for appointment types.

Accessing EMR Data and Functions

Use the side panel to access specific EMR functions. Click a link on the left to display the associated information and options in the window.

Information is displayed in line-item format. Use the buttons on the right to:

- – Add a new line item.
- – Edit a line item.
- – Delete a line item.
- – Save a new or edited item.
- – Expand the list.
- – Collapse the list.

Buttons and Functions

Use these buttons and functions on the **EMR** tab:

- **EMR Summary**–Click to view and edit details of the patient's medical history, surgical history, allergies, medications, procedures, letters, and notes. You can add items to the summary lists or edit existing items.

  Note: To minimize or maximize a section in the **EMR Summary** window, click the **up** or **down** arrow on the right side of the EMR section.

- **Procedure Hx**–Click to view a list of procedures that have been performed on a patient, beginning with the most recent. Use the buttons on the right to add or edit items.
- **Patient Reg**–Click to view patient registration documents.
- **Encounter Slip**–Click to open an **Encounter Slip**. You can enter information about patient visits, including diagnoses, shortcuts, pre-treatments, procedures, prescriptions, recalls, letters, and notes. You can also create actual, as well as PTE, charges for a specific ticket in this window. See "Using Encounter Slips" for more information
- **Rx**–Click to view and manage prescriptions for the patient. See "Working with Prescriptions" for more information.
- **Follow-ups**–Click to add recall information. Click to create a new line item. With the cursor in the **Code** column, select from the list of recall codes. The **Description** field populates automatically.
- **Implants**–Click to view and manage implants. Click to add an implant procedure.

- **EMR Consents**–Click to view and manage EMR consent forms. If a consent form is required for the current appointment type, **EMR Consents** is displayed in the **Chart Status** section of the window.

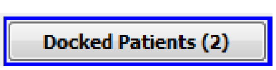
  A means action is needed; a means the form is complete. Click to complete a consent form. See "Using EMR Consent Forms" for more information.

- **Anesthesia**–Click to view and manage the patient's anesthesia records. Click to create an anesthesia record.
- **Notes**–Click to access EMR notes, digital forms, and narratives.
  - **EMR Notes**–Click to create an EMR note.
  - **Digital Forms**–Select **Completed** to view completed forms, **Appointment** to view forms for the current appointment, or **All Forms** for a list of forms to edit and attach to the patient.
  - **Narratives**–Click to add a narrative.
- **Images**–Click to view a patient's images. Select **Clinical**, **Non-Clinical**, or both. Select a line item to view the image in the **Preview** panel.
- **Attachments**–Click to view documents and files attached to a patient's record. Select **Clinical**, **Non-Clinical**, or both. To attach a document or image:
  - Click to scan a document or image.
  - Click to attach a document or image.
  - In the **Attachments** panel, click to attach a file. Use the tabs to view specific types of attachments: **Referral**, **Documents**, **Images**, or **iConsult**. Select a line item to view the attachment in the **Preview** panel.
- **Treatment Plans**–Click to access and manage the patient's treatment plans. Click to create a new treatment plan.

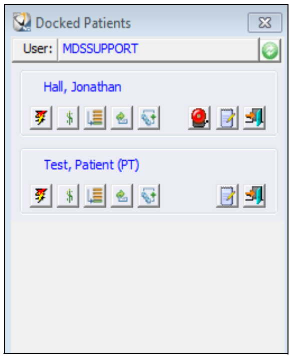
Docking Patient Records

You can temporarily dock and restore patient records. While a patient record is docked, you can work with other patient records or perform various tasks. To dock a patient record, while keeping it active, click the **Minimize Patient to Dock** button:

A button labeled **Docked Patients** is displayed in the upper-right corner of the window. The button has a number in parentheses that indicates how many patient records have been docked.



Click **Docked Patients**, and a list of all docked patient records is displayed.

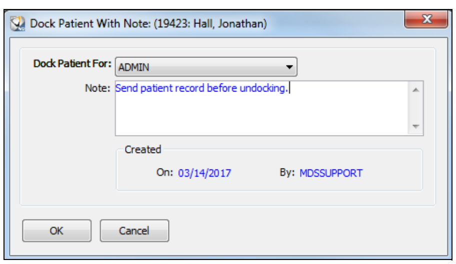


To restore a docked patient record, click the patient's name in the **Docked Patients** window. The **Patient Workspace** is displayed, and the patient record is removed from the **Docked Patients** window.

Routing Docked Patients to Others

To send a docked patient record to another staff member:

1 In the **Docked Patient** window, click the **Add a Dock Note** button. The **Dock Patient with Note** window is displayed.



2 From the **Dock Patient For** field, select the person to whom you want to send the patient record.

3 Type information you want to transmit in the **Note** field.

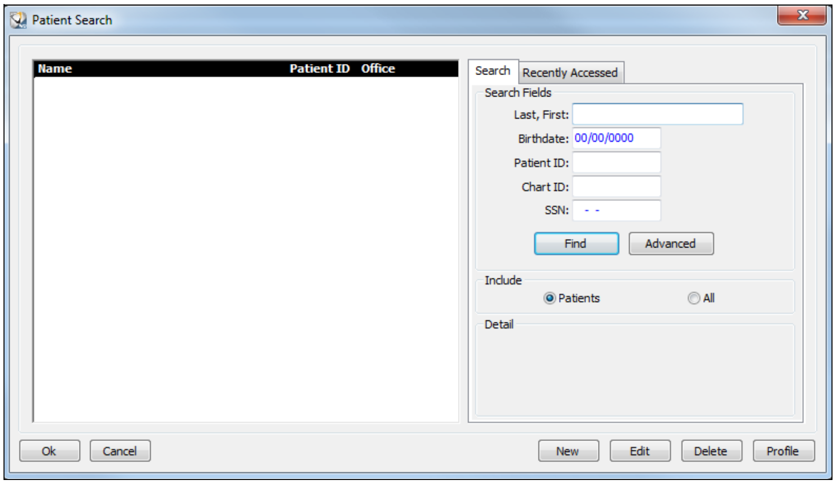
4 Click **Ok.**

To refresh the list of docked patient records in your **Docked Patients** window, click the green **Refresh** button to the right of your user name.

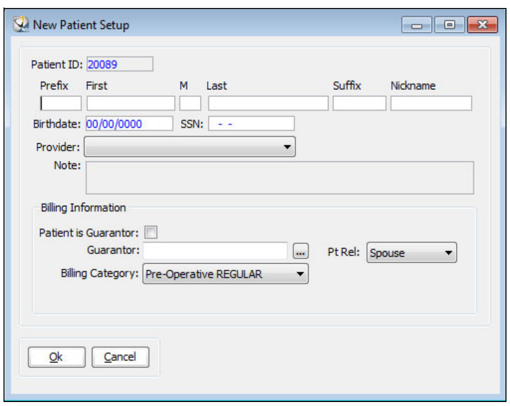
Adding New Patients

To add general information about a new patient:

1 Click the **Patients** icon on the toolbar. The **Patient Search** window is displayed.



2 Click **New**. The **New Patient Setup** window is displayed.



3 Enter the patient's information. The **Last** and **Provider** fields are required. Press Tab or Enter to move from field to field.

- **Prefix**–Type an appropriate prefix: Mr., Ms., Mrs., Dr., Rev., and so forth.
- **First**–Type the patient's full first name.
- **M**–Type the patient's middle name.
- **Last**–Type the patient's last name.
- **Suffix**–Type a suffix, if there is one: Jr., **III**, Ph.D.
- **Nickname**–Type a nickname or how the patient prefers to be addressed.
- **Birthdate**–Type the patient's birth date in the format MMDDYYYY. The software inserts the slashes.
- **SSN**–Type the patient's 9-digit Social Security number. The software inserts the dashes.
- **Provider**–Select a provider from the drop-down list.
- **Note**–Enter any notes that you need.

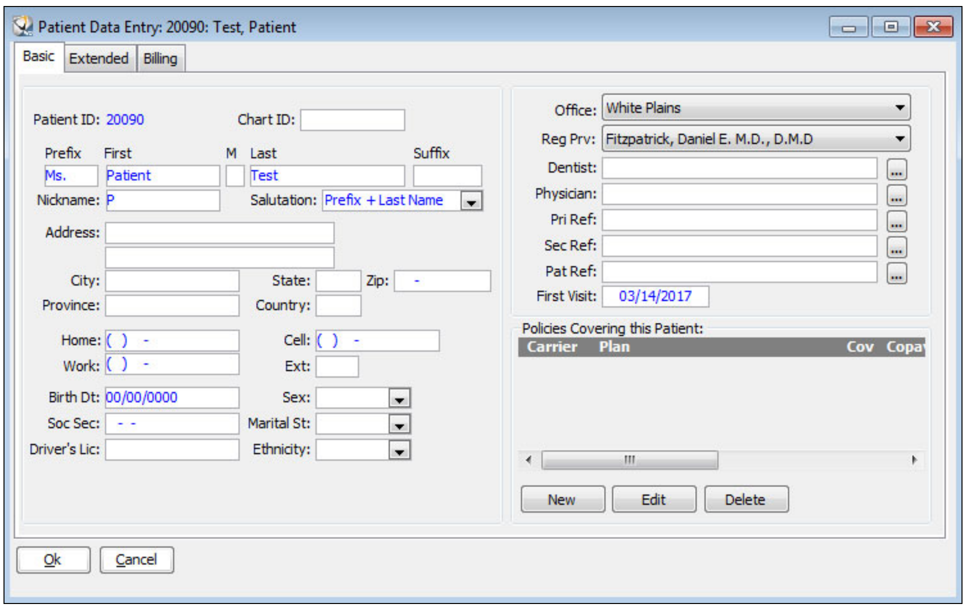
- **Billing Information** section:
  - **Patient is Guarantor**—Select if the patient is responsible for paying.
  - **Guarantor**—If someone else is responsible for paying, click the ellipses, and the **Guarantor Look-up** window is displayed. Select an existing guarantor or add a new one.
- **Pt Rel**—Select the relationship of the patient to the guarantor—child, parent, spouse, or other—from the drop-down list.
- **Billing Category**—Select the billing category from the drop-down list.

Note: The patient ID is generated by the software automatically.

4 Click **Ok.** The software checks to see if the data for the new patient matches the data for an existing patient. If it does, a window is displayed listing the matches and providing options.

Adding Detailed Patient Information

When you click **Ok** after adding the basic patient information, the **Patient Data Entry** window is displayed.



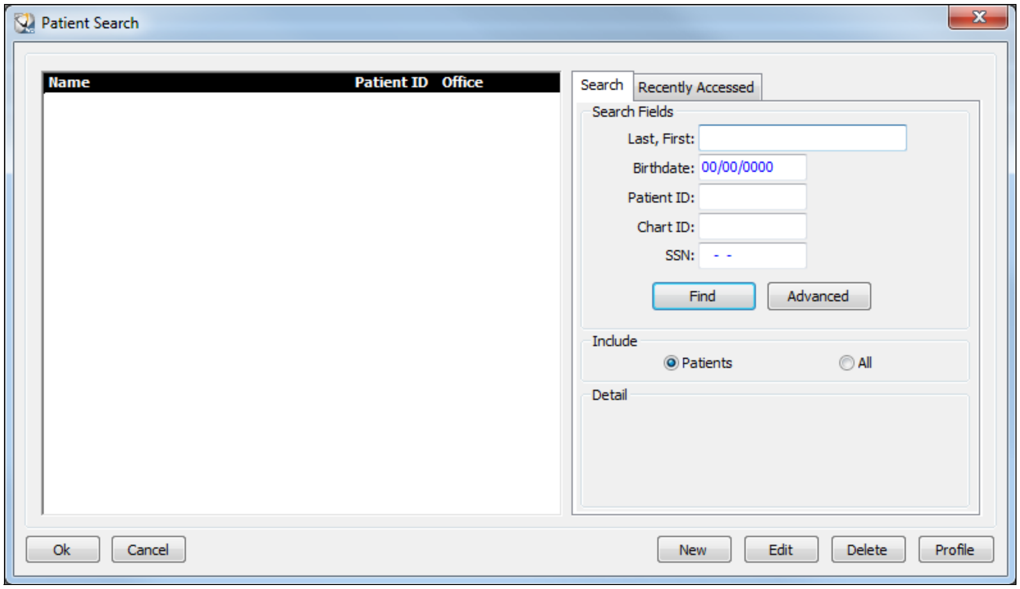
The **Patient Data Entry** window has these tabs:

- **Basic**—Use to add contact and insurance information.
- **Extended**—Use to provide employer, school, and emergency contact information.
- **Billing**—Use to provide detailed information about the guarantor and billing setup.

Finding Current Patients

To find a patient using the **Patient Search** window:

1 Click the **Patients** icon on the toolbar. The **Patient Search** window is displayed.



2 Type search criteria in the search fields, and click **Find**. You can enter partial information. For example, if the patient's name is Abramnowitz, enter the letter A in the **Last, First** field, and click **Find**. The **Patient Search** window displays every patient whose name begins with A.

3 Select the patient's name.

4 Click **Ok**.

Skill Sharpeners

Exercise 1—Work with Patient Data

To access patient data, do one of the following:

- Click the **Patients** button on the main toolbar.
- Select **Tables > Patients > Patients** on the menu bar.

The **Patient Search** window is displayed.

Exercise 2—Use the Patient Search Window

It was a busy morning, and someone left this message: "TT called and needs an appointment." Unfortunately, the person who took the message cannot remember the full name of the patient.

To find out how many patients have both a first name and last name that begins with the letter T:

1. Click the **Patients** button. The **Patient Search** window is displayed.
2. In the **Last, First** field, type **T, T.**
3. Click **Find.** A list of all patients whose last and first names start with T is displayed.
4. After you have made a list of patients to call, click **Cancel**.

Exercise 3—Edit a Patient Record

A patient comes in for an appointment. She indicates that she has a new address, but the same telephone number. Change the patient record appropriately.

To edit a patient's record:

1. Click the **Patients** button on the main toolbar. The **Patient Search** window is displayed.
2. Enter the patient's last name and first name, and click **Find.** The **Patient Activity** window is displayed.
3. Click **Edit.** The **Patient Data Entry** window is displayed.
4. Type the new address in the **Address** field.
5. Click **Ok.** An **Address Change** window is displayed, asking if you want to change all corresponding addresses.
6. If only this patient is moving, click **No**; if every patient in the household is moving, click **Yes.**

Exercise 4—Add Allergy Information

A patient tells you that she is allergic to penicillin. How do you add that to her record?

To add an allergy:

1. Find the patient and open the **Patient** window.
2. Click **EMR Summary.**
3. In the **Allergy** row, click the plus sign.
4. Select or type **Allergic to penicillin** and click **Save**.

4 Using the Scheduler

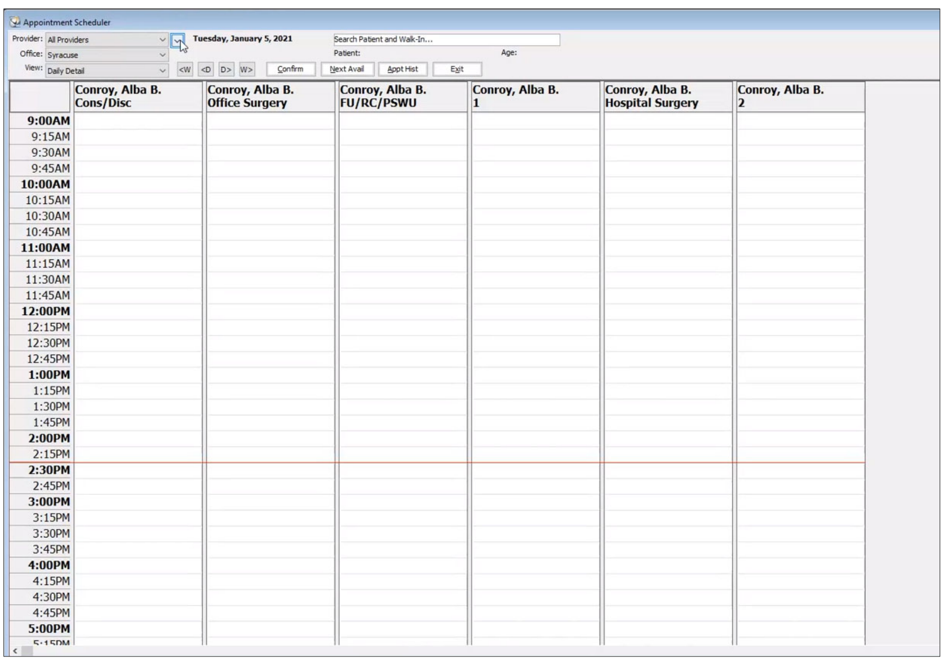
This lesson includes the following topics:

- Navigating the Scheduler
- Setting Up the Appointment Scheduler
- Scheduling Appointments
- Finding Available Time Slots
- Rescheduling an Appointment
- Using Recalls

Tip: To set scalable fonts on a workstation, select **Utilities > My Computer Settings> Layout Settings > Scheduler Font Size.**

Navigating the Scheduler

To open the Scheduler, click the **Scheduler** button on the main toolbar or select **Scheduler > Open Scheduler** on the main menu bar. The **Appointment Scheduler** window is displayed.

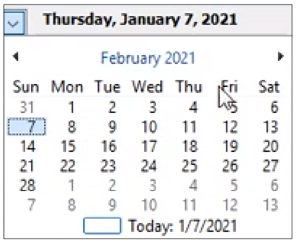


The Scheduler opens to the current date, and as you move through the Scheduler, each day opens to the office hours. To open the scheduler to the time your office opens, instead of the current time, select **Tables > Practice Preferences > Defaults > Scheduler** and change the setting.

Use any of these methods to change the date:

- To move forward or backward in one-day increments, hold down the Alt key and press the + or - key.
- To move forward or backward in one-day increments, click the **D >** or **< D** buttons at the top of the window.

- To move forward or backward in one-week increments, click the **W >** or **< W** buttons at the top of the window.
- To display a calendar, click the button in front of today's date. The calendar is displayed with the current date outlined in blue. You can click the month to select another month.



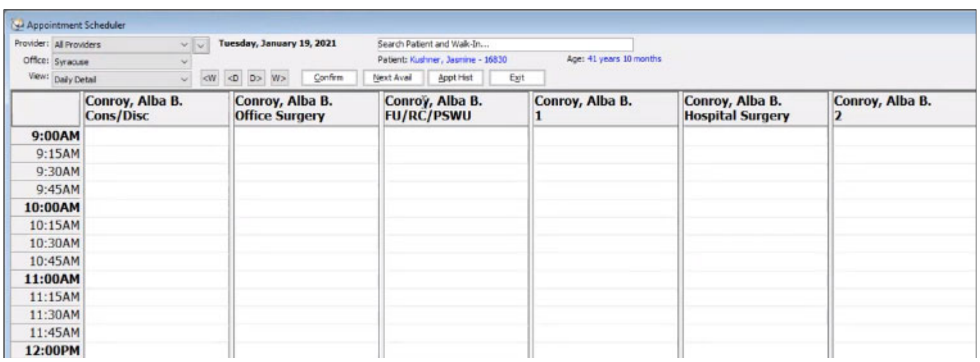
- Click any date on the calendar. The **Appointment Scheduler** window opens to that date, and the calendar is closed.
- Click the left-arrow button on the calendar to move back one month; click the right-arrow button to move forward one month.

Tip: As you move through the Scheduler, a red time bar indicates the current time.

Note: You can search for a patient by name, address, date of birth, SSN, phone number, and so on, directly on the Scheduler.

Changing Scheduler Views

Three fields are at the top of the **Appointment Scheduler** window: **Provider**, **Office**, and **View**.



Use the drop-down list in the **Provider** field to select **All Providers** or a specific provider.

Use the **Office** drop-down list to select one office or all offices.

Use the drop-down list in the **View** field to select from these options:

- **Daily Detail**–All columns for each provider are displayed.
- **Daily Summary**–A summary column is displayed for any provider using a column schedule rather than a template schedule.
- **Weekly Summary**–A week is displayed when a name is selected from the **Provider** drop-down list.

Tip: To change the point size of the text, select **Utilities > My Computer Settings > Layout Settings**.

Setting Up the Appointment Scheduler

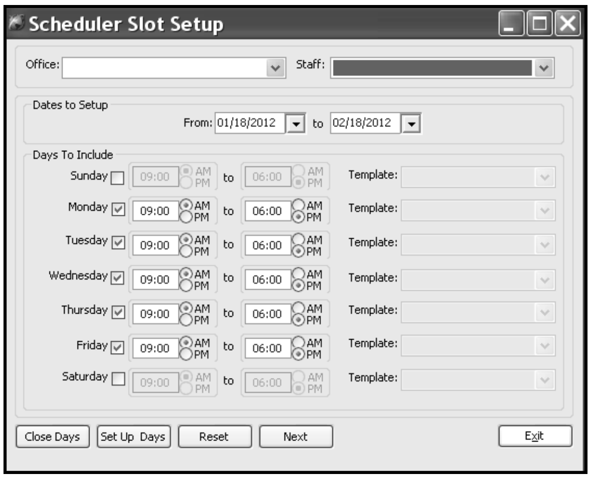
Before using the Scheduler:

- Set up offices, if you have multiple offices.
- Add schedules for providers.
- Add appointment types.
- Add appointment categories.

Adding Provider Schedules

You can set up each provider's schedule to match his or her work schedule. To add a provider schedule:

1 Select **Scheduler > Setup Scheduler > Slot Setup**. The **Scheduler Slot Setup** window is displayed.



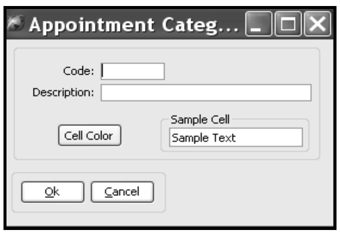
2. In the **Staff** field, select the provider.
3. In the **Office** field, select the office location.
4. In the **Dates to Setup** field, enter the range of dates for which you are setting up the schedule.
5. In the **Days to Include** field, select the days of the week, along with the time for which the schedule is open each day.
6. Click **Set Up Days**.
7. To set up additional providers, click **Next.** Otherwise, click **Exit.**

Adding Appointment Categories

To add an appointment category:

1 Select **Tables > Appointments > Categories.** The **Appointment Category Search** window is displayed.

2. Click **New.** The **Appointment Category Data Entry** window is displayed.



3. In the **Code** and **Description** fields, type an appointment category code and description.

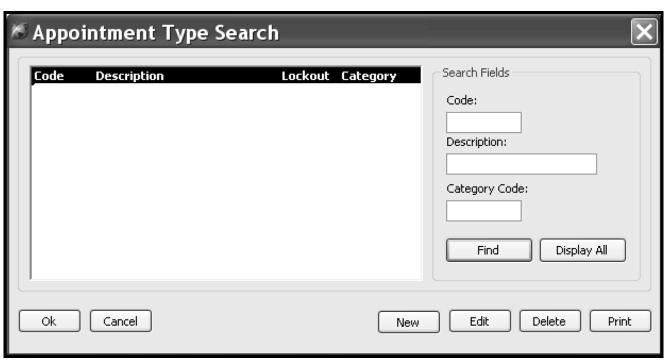
4. Click **Cell Color** to select the color of the cell to display on the **Appointment Scheduler.** Select a color and click **Ok.**

5. Click **Ok.**

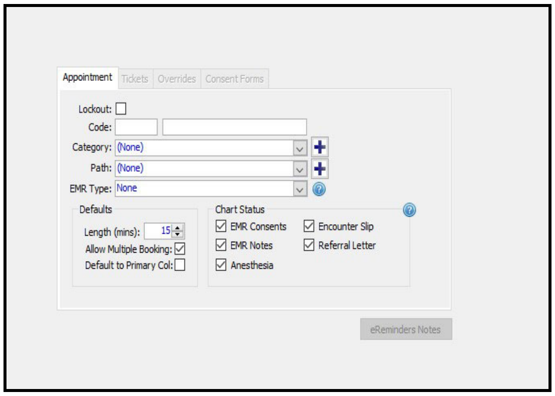
Adding Appointment Types

To add an appointment type:

1 Select **Tables > Appointment > Type.** The **Appointment Type Search** window is displayed.



2 Click **New**. The **Appointment Type Data Entry** window is displayed.



3 In the **Code** field, type a unique code and a description.

4 To indicate an appointment type as a lockout, select **Lockout**.

5 From the **Category** drop-down list, select an appointment category.

6 In the **Defaults** section, use the arrows in the **Length (mins)** field to select an appointment length.

7 To enable scheduling of more than one appointment at a time, select **Allow Multiple Booking**. If this is not selected, the word **Reserved** is displayed in the other provider columns.

8 To use the first column of a provider when scheduling, select **Default to Primary Col**.

9 Click **Ok**.

Note: The appointment color, displayed on the side of an appointment, is based on the appointment type.

Scheduling Appointments

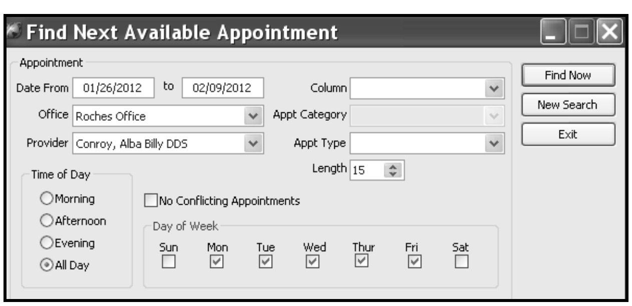
If a patient has been selected when you initiate the scheduling process, the appointment is scheduled for that patient. If there is no current patient and you begin to schedule an appointment, a search window is displayed prompting you to select an existing patient or enter a new name.

Finding Available Time Slots

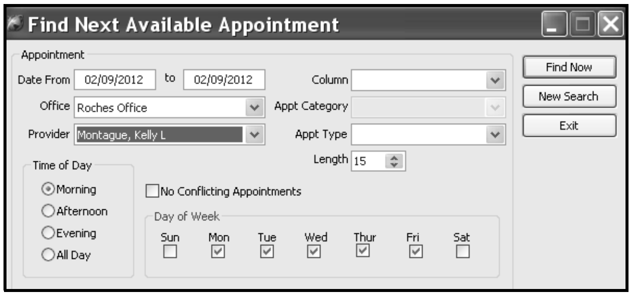
To find an available time slot:

1 Select **Scheduler > Open Scheduler**. The **Appointment Scheduler** window is displayed.

2. Click **Next Avail**. The **Find Next Available Appointment** window is displayed.



3. Select the criteria, and click **Find Now**. The **Find Next Available Appointment** window is displayed. Search results are displayed in the lower section of the window.



4. Do one of the following:

- Double-click the acceptable time slot.
- Select the slot, and click **Schedule**.
- Click **View** to open the schedule for that day.

Note: As you move through the Scheduler, a time bar indicates the current time.

Scheduling an Existing Patient

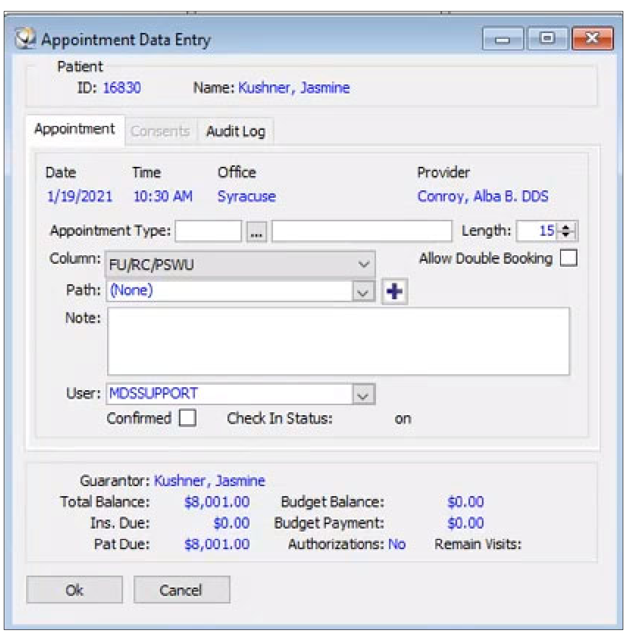
To schedule an appointment for an existing patient:

1 Select **Scheduler > Open Scheduler**. The **Appointment Scheduler** window is displayed.

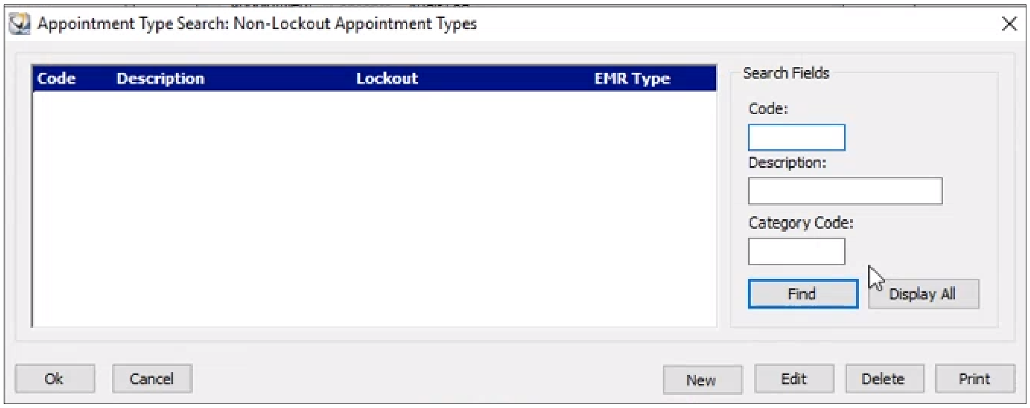
2 Select the date on which you want to schedule an appointment.

3 Use the **Search** field to select the patient you want.

4 Right-click the time slot for the appointment, and click **Add Appt**. The **Appointment Data Entry** window is displayed.



5 Click the **ellipsis** next to **Appointment Type.** The **Appointment Type** window is displayed.



6 Enter information in the fields and click **Ok.** The appointment is displayed on the Scheduler.

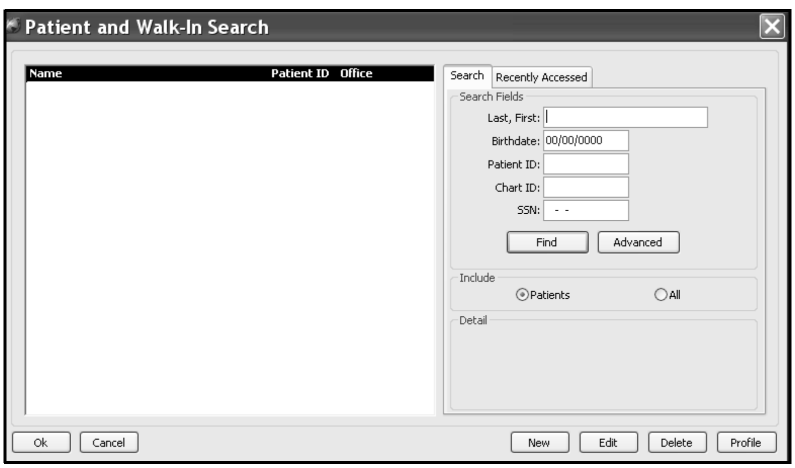
Scheduling a New Patient

To schedule an appointment for a new patient:

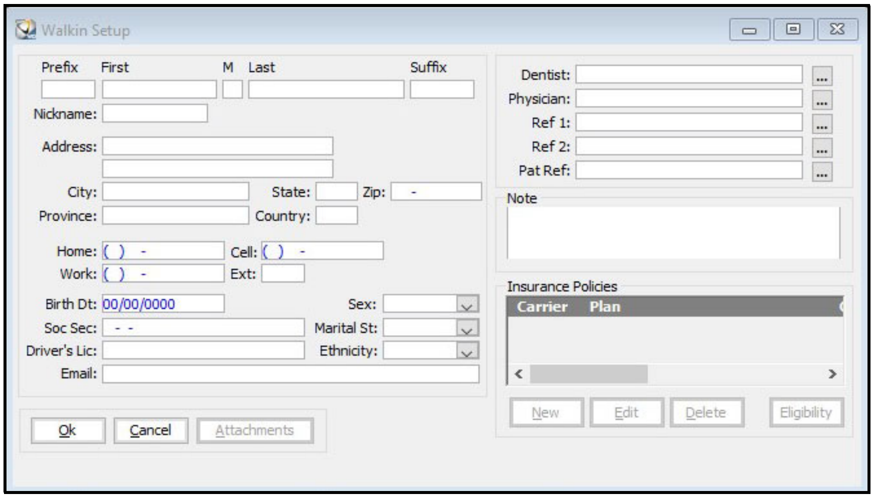
1 Select **Scheduler > Open Scheduler.** The **Appointment Scheduler** window is displayed.

2 Select the date on which you want to schedule an appointment.

3 Double-click the time of the appointment. The **Patient and Walk-In Search** window is displayed.

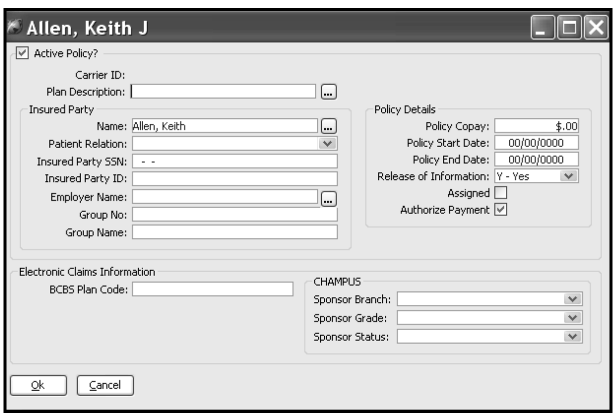


4 Click **New.** The **Walkin Setup** setup window is displayed.



5 Enter the patient's information in the fields.

6 Under **Insurance Policies**, click **New.** The **Policy Entry** window is displayed.



7 Enter the patient's insurance information.

8 Click **Ok** until you return to the **Appointment Scheduler** window.

Scheduling Lockout Appointments

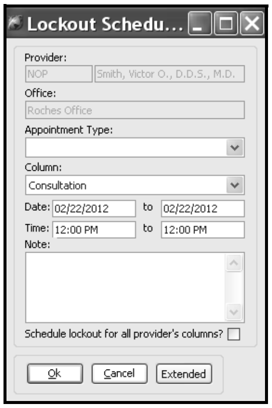
Lockout appointments are times dedicated to meetings, lunch, and so forth, when patient appointments should not be scheduled. Lockout appointments can be regularly scheduled or one-time events.

To schedule a lockout:

1 Select **Scheduler > Open Scheduler**. The **Appointment Scheduler** window is displayed.

2 Select the date on which you want to schedule the lockout.

3 In the suitable time slot, right-click and select **Add Lockout** from the menu. The **Lockout Scheduling** window is displayed.



4 In the **Appointment List** field, select the type of lockout.

5 Enter the date range and duration of the lockout.

6 Enter a note, if necessary.

7 If the lockout is for all providers, select **Schedule lockout for all provider's columns**.

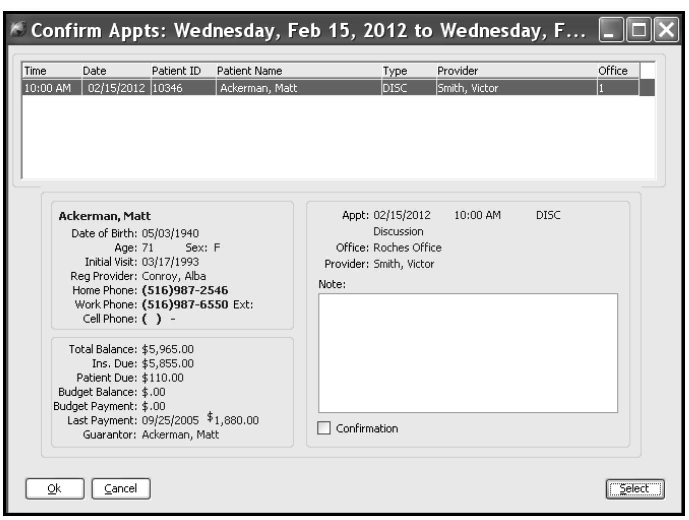
8 Click **Ok.**

Confirming Appointments

To confirm an appointment:

1 Click the **Scheduler** button on the toolbar. The **Appointment Scheduler** window is displayed.

2 Click **Confirm.** The **Appointment Confirmation** window is displayed.



3 Select the appointment you want to confirm.

4 Enter a note, if necessary.

5 Select **Confirmation.**

6 Click **Ok.** A checkmark is displayed next to each confirmed appointment on the Scheduler.

Note: To change or view an appointment status, you can right-click it on the Scheduler.

Rescheduling an Appointment

To reschedule an appointment:

1 Click the **Scheduler** button on the toolbar. The **Appointment Scheduler** window is displayed.

2 Right-click the appointment you want to move and select **Cut.**

3 Right-click the new time slot and select **Paste.** The **Appointment Data Entry** window is displayed.

4 Click **Ok.**

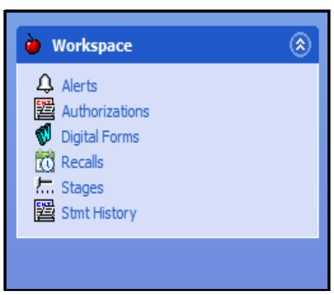
Using Recalls

To enter a recall for a patient:

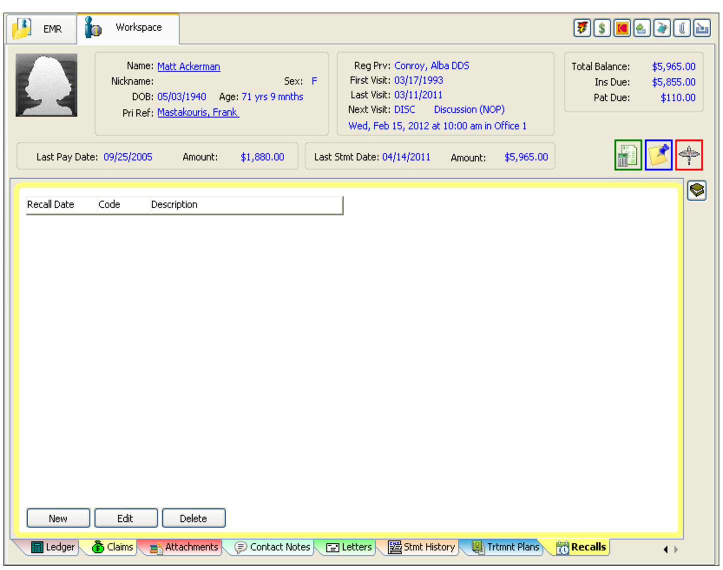
1 Click the **Patients** icon on the toolbar. The **Patient Search** window is displayed.

2 Find the patient for whom you want to enter a recall. The **Patient** window is displayed.

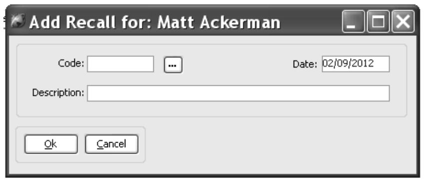
3 In the **Workspace** window, click the **Additional Features** button . A menu is displayed.



4 Select **Recalls.** The **Recalls** window is displayed.



5 Click **New.** The **Add Recall** window is displayed.



6 In the **Code** field, type a recall code, or click the button to the right of the field and select a code from the list.

7 Click **Ok** and **Exit**.

Changing Recalls

To change a recall:

1 Select a patient in the **Patient** window.

2 In the **Workspace** window, click **Recalls**. The **Recalls** window is displayed.

3 Select the record you want to change.

4 Click **Edit.** The **Update Recall** window is displayed.

5 Change the information.

6 Click **Ok** and **Exit**.

Deleting Recalls

To delete a recall:

1 Select a patient in the **Patient** window.

2 In the **Workspace** window, select **Recalls.** The **Recalls** window is displayed.

3 Select the record you want to delete.

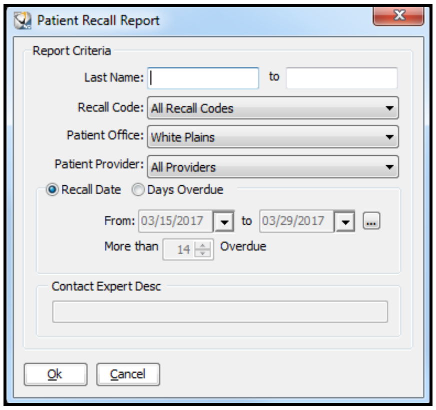
4 Click **Delete.** A confirmation message is displayed.

5 Click **Yes** and **Exit.**

Printing Recall Reports

To print a recall report:

1 Select **Reports > Patient > Recall**. The **Patient Recall Report** window is displayed.



2 In the **Last Name** fields, enter a range of last names.

3 From the drop-down list in the **Recall Code** field, select a code.

4 From the drop-down list in the **Patient Office** field, select the office.

5 From the drop-down list in the **Patient Provider** field, select the provider.

6 Select whether to generate the report based on recall days or days overdue.

7 Click **Print**. The **Print Patient Recall Report** window is displayed.

8 Change the settings, if necessary, and click **Print**.

Skill Sharpeners

Exercise 1—Change Dates

To display the schedule for three weeks from today:

1 Select **Scheduler > Open Scheduler**. The **Appointment Scheduler** window is displayed for today's date.

2 Click the **W>** button three times.

To display the calendar three weeks from today, click the down-arrow button in front of the day and date.

To move one month later on the calendar:

1 Click the right-arrow button in the upper-right corner of the calendar. The calendar is displayed for the next month.

2 Click the appropriate date on the calendar.

To return to today's date from any place in the Scheduler:

1 Display the calendar by clicking the down-arrow button in front of the day and date on the **Appointment Scheduler** window.

2 Click **Today** at the bottom of the calendar.

Exercise 2—Make an Appointment

A patient calls and wants to know if she may make an appointment for tomorrow afternoon. To check on the availability of a slot and to make an appointment:

1 Select **Scheduler > Open Scheduler**. The **Appointment Scheduler** window is displayed.

2 Click **D>** to move to tomorrow. A slot is available at 3 p.m., and the patient wants to make an appointment then.

3 Double-click the time. The **Patient and Walk-In Search** window is displayed.

4 In the **Last, First** field, type the first three letters of the patient's last name, and click **Find.** A list of patients is displayed.

5 Select the patient and click **Ok.** If the patient has alerts, they are displayed. Click **Ok.** The **Appointment Data Entry** window is displayed.

6 Enter the data.

7 Click **Cancel.**

5 Working with Insurance

This lesson includes the following topics:

- Working with Insurance Carriers
- Working with Insurance Plans
- Working with Fee and Allowable Schedules

Working with Insurance Carriers

You can:

- Add a carrier to the software.
- Edit information about a carrier.
- Delete a carrier.

A carrier name is entered only once. Think of the carrier as the parent company; one or more plans are under each carrier. Under each plan is a policy.

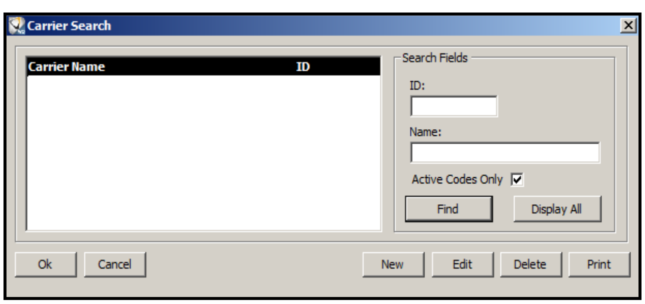
You can obtain the following policy information from an insurance card:

- Plan name
- Insured party name
- Insured party ID number
- Employer
- Group number
- Group name

Adding Carriers

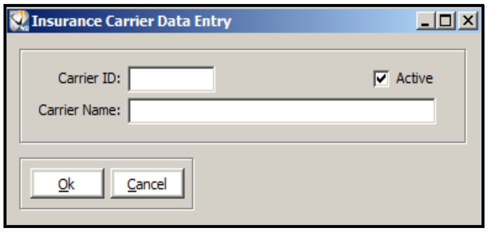
To add an insurance carrier:

1 Select **Tables > Insurance > Carriers**. The **Carrier Search** window is displayed.



2 Click **New**.

The **Insurance Carrier Data Entry** window is displayed.



3 In the **Carrier ID** field, type a code.

4 In the **Carrier Name** field, type a name.

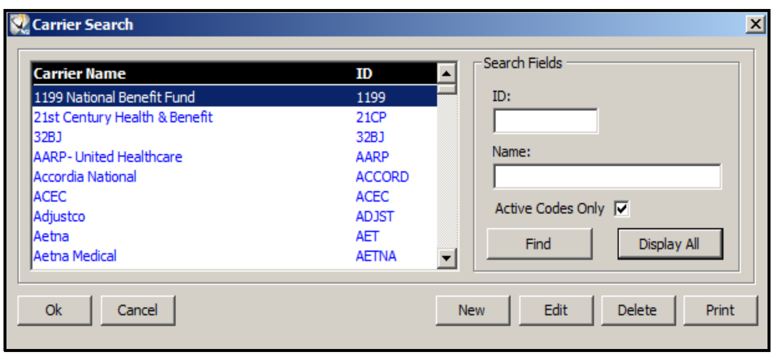
5 Click **OK**.

Editing Insurance Carriers

To change the data associated with an insurance carrier:

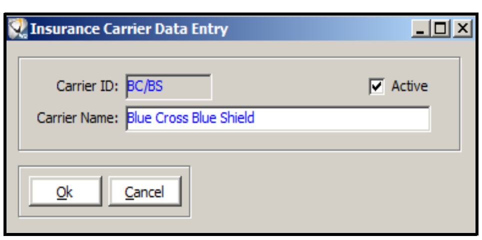
1 Select **Tables > Insurance > Carriers**. The **Carrier Search** window is displayed.

2 Type search criteria in the search fields, and click **Find.** The carriers that match your search criteria are listed on the left side of the **Carrier Search** window. If you are unsure of the **Carrier ID** or **Carrier Name**, click **Display All.**



3 Select the carrier you want to edit.

4 Click **Edit.** The **Insurance Carrier Data Entry** window is displayed.



5 Edit the information, as necessary.

6 Click **OK.**

Deleting Insurance Carriers

An insurance carrier cannot be deleted if an existing insurance plan is associated with it. If you have added a carrier erroneously—for example, if you added a carrier that had previously been added—and there are no plans associated with it, you can delete it.

To delete an insurance carrier:

1 Select **Tables > Insurance > Carriers**. The **Carrier Search** window is displayed.

2 Type search criteria in the fields, and click **Find.** The carriers that match your search criteria are displayed.

3 Select the carrier to delete.

4 Click **Delete.** A confirmation message is displayed.

5 Click **Yes.**

Working with Insurance Plans

An insurance plan is associated with a specific insurance carrier. Therefore, the carrier must be added to the software before the plan can be added.

Note: One carrier may offer different insurance plans.

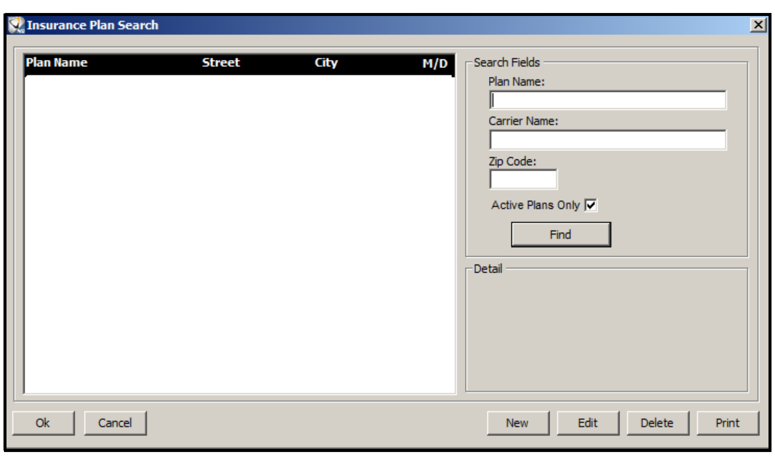
You can:

- Add a plan to the software.
- Edit information about a plan.
- Delete a plan.
- Add fee or benefit information to a plan.

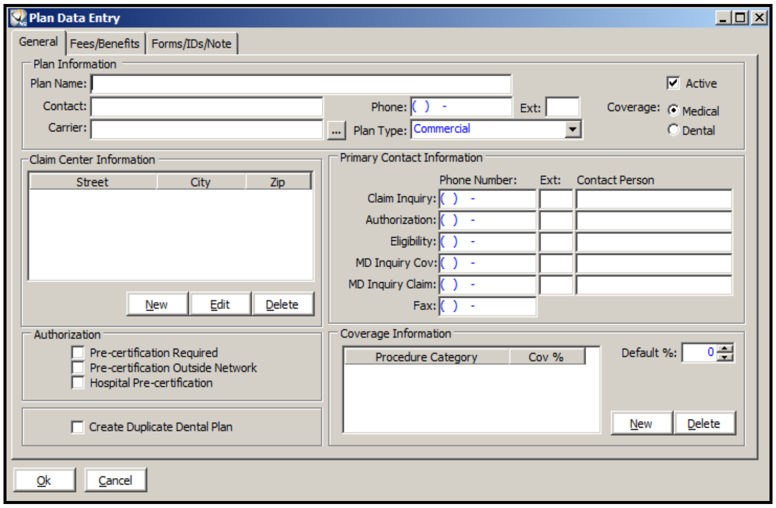
Adding Insurance Plans

To add an insurance plan:

1 Select **Tables > Insurance > Plans.** The **Insurance Plan Search** window is displayed.



2 Click **New.** The blank **Plan Data Entry** window is displayed.



3 In the **Plan Name** field, type a name for the plan.

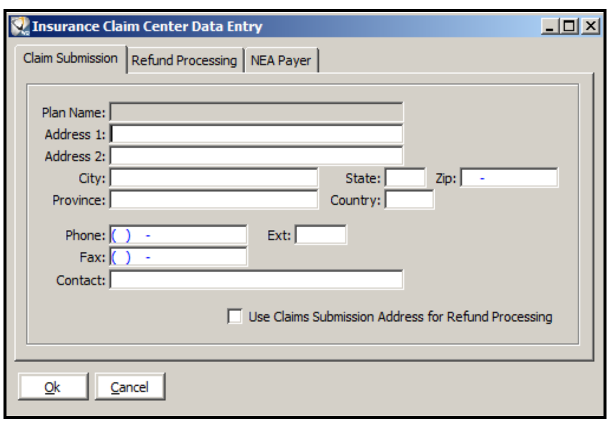
4 In the **Coverage** field, select **Medical** or **Dental.**

5 In the fields, type a contact name, a phone number, and an extension.

6 In the **Carrier** field, click the ellipsis button and select a carrier.

7 In the **Plan Type** field, select a type.

8 To enter claim center information, click **New** in the **Claim Center Information** section. The **Insurance Claim Center Data Entry** window is displayed.



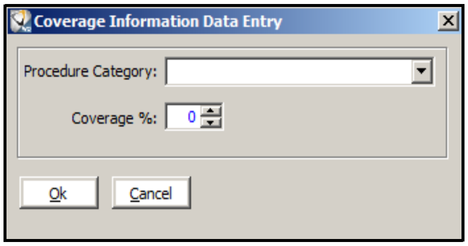
9 Enter information and click **Ok.** The **Plan Data Information** window is displayed.

10 Type information in the **Primary Contact Information** fields.

11 Select the options for authorizations that apply to this plan.

12 To create a plan that covers both medical and dental coverage, select the **Create Duplicate Dental (Medical) Plan** option.

13 To assign different coverage percentages to procedure categories, click **New** in the **Coverage Information** section. The **Coverage Information Data Entry** window is displayed.



14 From the drop-down list, select a procedure category, enter the coverage percentage, and click **OK.** Repeat this step for each category to which you want to assign a specific coverage percentage.

15 To establish a default percentage of coverage for all procedure categories, enter that percentage in the **Default %** field.

16 Click **Ok.**

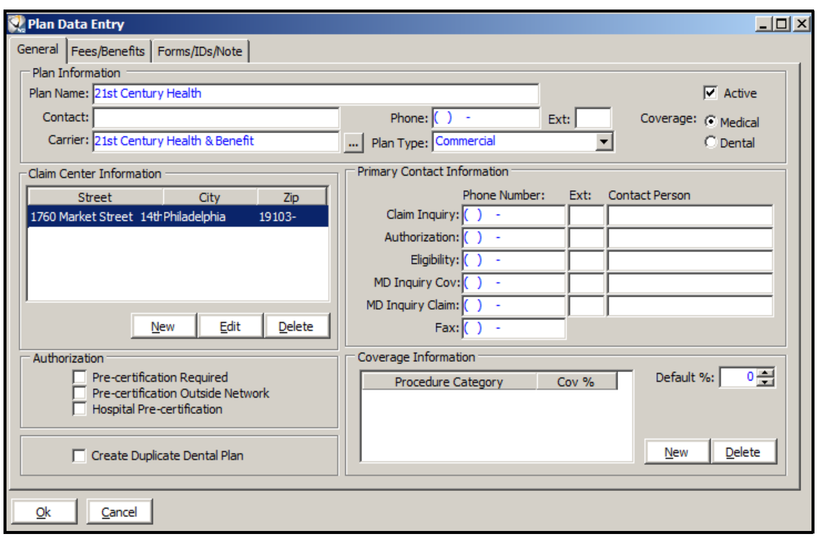
Editing Insurance Plans

To edit an insurance plan:

1 Select **Tables > Insurance > Plans.** The **Insurance Plan Search** window is displayed.

2 In the **Plan Name** field, type the plan name, and click **Find.**

3 Select the plan you want, and click **Ok.** The **Plan Data Entry** window is displayed.



4 Most fields can be edited by placing the cursor in the field and deleting and retyping. To edit claim center information, click **Edit.** The populated **Insurance Claim Center Data Entry** window is displayed.

5 Make the edits.

6 Click **Ok.**

Deleting Insurance Plans

To delete an insurance plan:

1 Select **Tables > Insurance > Plans.** The **Insurance Plan Search** window is displayed.

2 In the **Plan Name** field, type the plan name, and click **Find.**

3 Select the plan you want, and click **Delete.** A confirmation message is displayed.

4 Click **Yes.**

Adding Fee and Benefit Information

Use the **Fees/Benefits** tab of the **Plan Data Entry** window to provide schedule information, co-payment information, and detailed insurance coverage information.

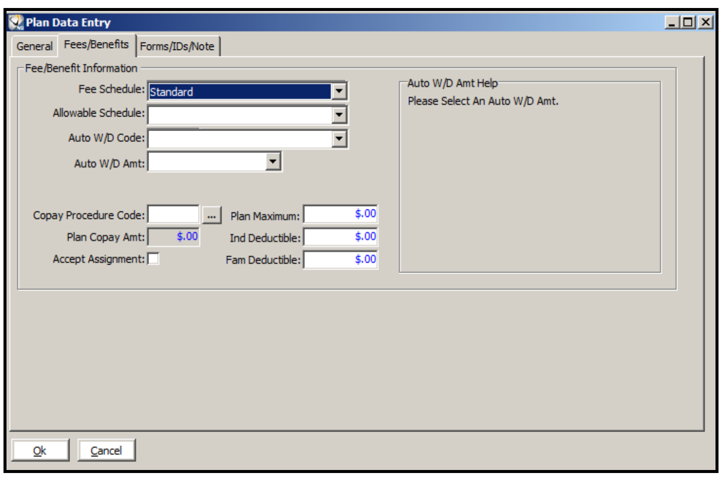
To add fee and benefit information to an insurance plan:

1 Select **Tables > Insurance > Plans.** The **Insurance Plan Search** window is displayed.

2 In the **Plan Name** field, type the plan name, and click **Find.**

3 Select the plan you want, and click **Ok.** The **Plan Data Entry** window is displayed.

4 Click the **Fees/Benefits** tab. The **Plan Data Entry** window is displayed.



5 Select a fee schedule from the **Fee Schedule** drop-down list.

6 Select an allowable schedule for insurance estimating from the **Allowable Schedule** drop-down list.

7 From the **Auto W/D Code** drop-down list, select an option.

8 From the **Auto W/D Amt** drop-down list, select an option.

9 In the **Copay Procedure Code** field, enter an adjustment code **OR** click the ellipsis button to select from a list of codes.

10 Select **Accept Assignment** if you accept the assignment of benefits for the plan.

11 In the **Plan Maximum** field, type the maximum annual benefits, if applicable.

12 In the **Ind Deductible** field, enter a deductible for each patient, if applicable.

13 In the **Fam Deductible** field, enter a deductible for a family, if applicable.

14 Click **OK**.

Adding Forms, IDs, and Notes

Use the **Forms/IDs/Note** tab of the **Plan Data Entry** window to provide information about insurance forms, group and provider IDs, and electronic claims setup.

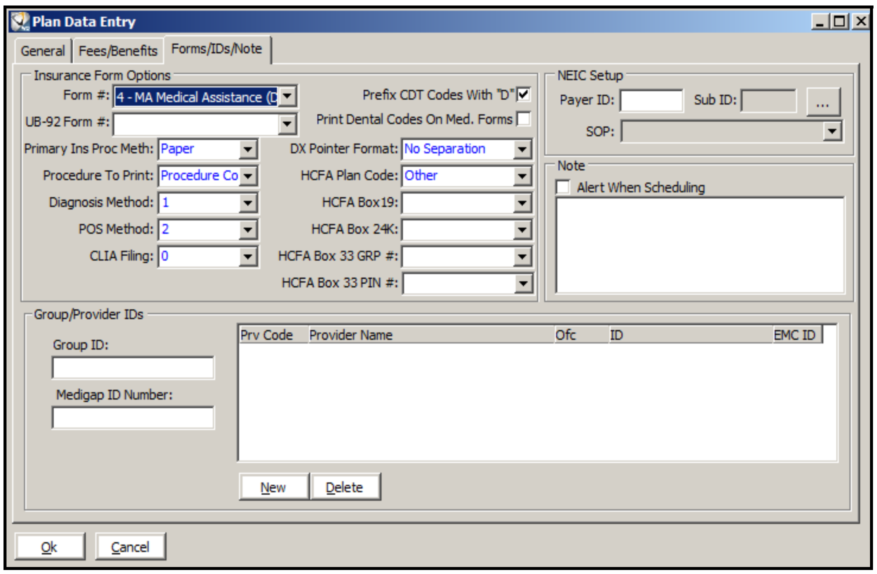
To add a form, ID, or note:

1 Select **Tables > Insurance > Plans**. The **Insurance Plan Search** window is displayed.

2 In the **Plan Name** field, type the plan name, and click **Find**. The results are displayed.

3 Select the plan you want, and click **Ok**. The populated **Plan Data Entry** window is displayed.

4 Click the **Forms/IDs/Note** tab. The **Plan Data Entry** window is displayed.



5 In the **Insurance Form Options** section, set these options:

- **Form #**–Applies an insurance format based on whether the coverage is medical or dental.
- **UB-92 Form #**–Applies an applicable UB-92 format. If the plan does not accept UB-92 billing, leave this field blank.
- **Primary Ins Proc Method**–Select whether claims will be processed by **Paper** or **Electronic.**
- **Procedure to Print**–Sets a coding method.
- **Diagnosis Method** –Sets the method to print reference numbers or codes:
  - **1**–Prints reference numbers.
  - **2**–Prints ICD codes in HCFA box 24E.
  - **3**–Does not print ICD codes.
- **POS Method**–Sets the method to print place-of-service codes:
  - **1**–Prints single-digit place-of-service codes.
  - **2**–Prints double-digit place-of-service codes.
- In the **CLIA Filing** field, the default is **0**. Select **Provider, Office, or Practice.**

6. Select the **Prefix CDT Codes with "D"** option to have the software replace the leading zero of your dental codes with a **D** on insurance claims for this plan.

7. Select the print options for medical forms from these drop-down lists:

   - **HCFA Plan Code**
   - **HCFA Box 19**
   - **HCFA Box 24K**
   - **CMS 1500 (08/05) 33a**
   - **CMS 1500 (08/05) 33b**

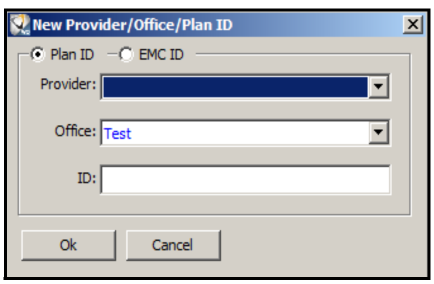
8. If you use the WinOMS electronic claim processing service, complete the fields in the **NEIC Setup** section:

   - In the **Payor ID** field, type a payor identification number.
   - In the **SubID** field, type a payor sub-identification number provided by NEIC.
   - From the **SOP** drop-down list, select a payment method.

9. To display a note automatically when scheduling a patient who has a policy that uses this insurance plan, select **Alert When Scheduling**, and type a note in the space provided.

10. In the **Group ID** and **Medigap ID Number** fields, type the ID numbers.

11. If you do not need to enter individual provider IDs, go to the final step. To enter individual provider IDs, click **New**. The **New Provider/Office/Plan ID** window is displayed.



12. Select the **Plan ID** or **EMC ID** option. Use **EMC ID** only for carriers that require it. This option requires the EMC provider ID to appear in BAO, YAO, and BA1.

13. Set these options:

   - **Provider**–Name of the individual provider of services
   - **Office**–Office where services are provided
   - **ID**–Identification number

14. Click **Ok** twice.

Working with Fee and Allowable Schedules

A fee schedule lists the charges for each procedure. In most cases, alternative fee schedules are associated with insurance plans; you can, however, assign a fee schedule to a patient.

The following rules apply to fee schedules:

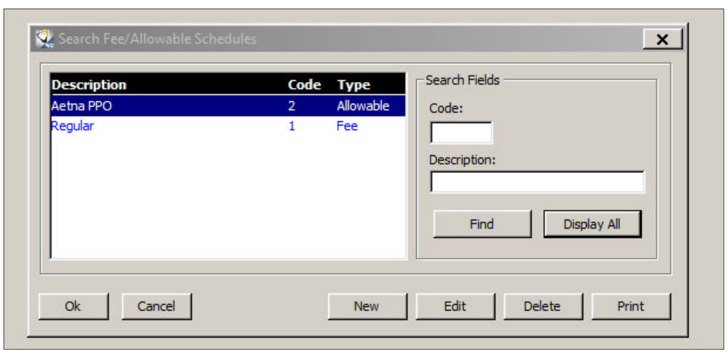
- When a procedure is posted, the fee is determined by the insurance coverage of the patient. If a fee schedule is attached to the plan, it is applied.
- If there is no fee schedule attached to the plan, the fee schedule attached to the patient is used.
- If there is no fee schedule attached to the patient, the standard fee schedule specified in the **Financial** section of the **Practice Data Entry** window is used.

An allowable schedule is a set of fees provided by an insurance company. It is used to estimate insurance reimbursement, which enables you to separate the patient amount due and the insurance amount due.

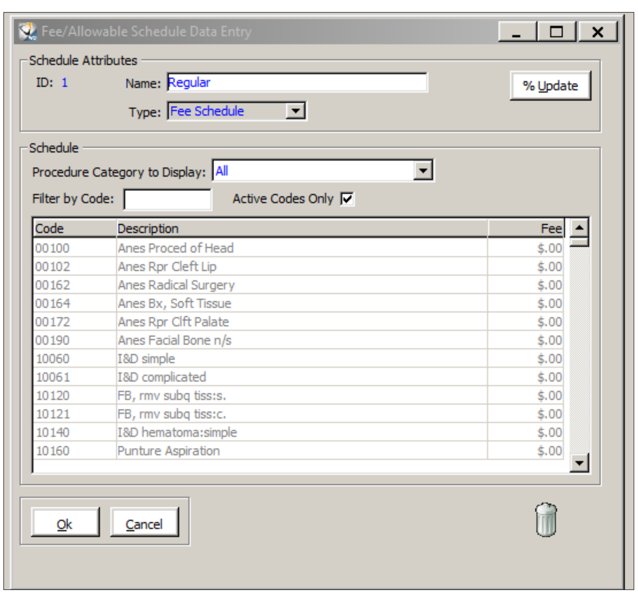
Setting Up Fee Schedules

To add a fee schedule:

1 Select **Tables > Procedure > Fee/Allow Schedules**. The **Search Fee/Allowable Schedules** window is displayed.



2 Click **New**. The **Fee/Allowable Schedule Data Entry** window is displayed.



3 In the **Name** field, type a name for the fee schedule.

4 In the **Type** field, select **Fee Schedule**.

5 In the **Procedure Category to Display** drop-down list, select the first category for which you want to enter fees. A list of procedure codes is displayed.

6 For each procedure in the category, type the fee in the **Fee** column.

7 Repeat steps 5 and 6 for the next category. Each time you select a new category, you are prompted to save your changes.

8 Click **Ok**.

Setting Up Allowable Schedules

To set up an allowable schedule:

1 Select **Tables > Procedure > Fee/Allow Schedules**. The **Search Fee/Allowable Schedules** window is displayed.

2 Click **New**. The **Fee/Allowable Schedule Data Entry** window is displayed.

3 In the **Name** field, type a name for the allowable schedule.

4 In the **Type** field, select **Allowable Schedule**.

5 In the **Procedure Category to Display** drop-down list, select the first category for which you want to enter fees. A list of procedure codes is displayed.

6 For each procedure in the category, type the fee in the **Fee** column.

7 Repeat steps 5 and 6 for the next category. Each time you select a new category, you are prompted to save your changes.

8 Click **Ok**.

Replacing or Copying Fee and Allowable Schedules

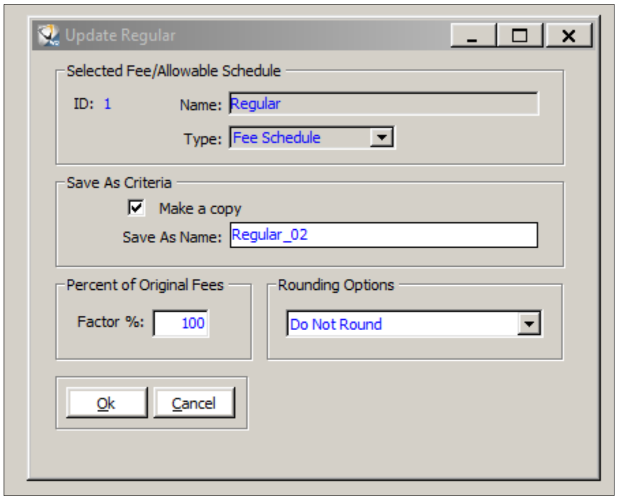
To replace or copy a fee or allowable schedule:

1 Select **Tables > Procedure > Fee/Allow Schedules**. The **Search Fee/Allowable Schedules** window is displayed.

2 Type search criteria in the search fields, and click **Find.** The schedules matching your search criteria are displayed.

3 Select the fee schedule to replace or copy and click **Edit.**

4 Click **Update %**. The **Update** window is displayed.



5 In the **Save As Criteria** section, do one of the following:

- To replace the schedule, deselect the **Make a copy** option and do not change the name.
- To copy the schedule, select the **Make a copy** option and type a name in the **Save As Name** field.

6 In the **Percent of Original Fees** section, change the **Factor %:** field to increase or decrease the fees from the original schedule. For example, to increase fees by 5%, type **105%** in the field.

7 In the **Rounding Options** section, select one of these options:

- **Do Not Round**–The fee is not rounded to the whole dollar amount.
- **Round to the Nearest Dollar**–The fee is rounded up or down to the nearest dollar amount.

8 Click **Ok**, and a replacement or copy of the schedule is created. The **Fee/Allowable Schedule Data Entry** window is displayed.

9 Edit the fee schedule as needed.

10 Click **Ok.**

Deleting Fee and Allowable Schedules

To delete a fee or allowable schedule:

1 Select **Tables > Procedure > Fee/Allow Schedules**. The **Search Fee/Allowable Schedules** window is displayed.

2 Type search criteria in the search fields, and click **Find.** The schedules matching your search criteria are displayed.

3 Select the schedule to change.

4 Click **Delete.** A confirmation message is displayed.

5 Click **Yes.**

Skill Sharpeners

Exercise 1—Check an Insurance Carrier

Find out who the insurance carrier is for a particular patient. To check a patient's insurance carrier:

1 Click the **Patients** button on the toolbar. The **Patient Search** window is displayed.

2 Enter the first three letters of a patient's name in the **Last, First** field, and click **Find.** A list of patients is displayed.

3 Select the patient you want and click **Ok.** The information window is displayed for that patient.

4 Click the **Workspace** tab. The **Workspace (Demographics)** window displays a list of carriers who insure the patient.

Exercise 2—Add a Carrier

To add an insurance carrier:

1 Select **Tables > Insurance > Carriers**. The **Carrier Search** window is displayed.

2 Click **New**. The **Insurance Carrier Data Entry** window is displayed.

3 Enter a **Carrier ID** and **Carrier Name.**

4 Click **Ok.**

Exercise 3—Delete a Carrier

To delete an insurance carrier:

1 Select **Tables > Insurance > Carriers**. The **Carrier Search** window is displayed.

2 Select the carrier that you created.

3 Click **Delete.** A confirmation message is displayed.

4 Click **Yes.**

6 Working with Referrals

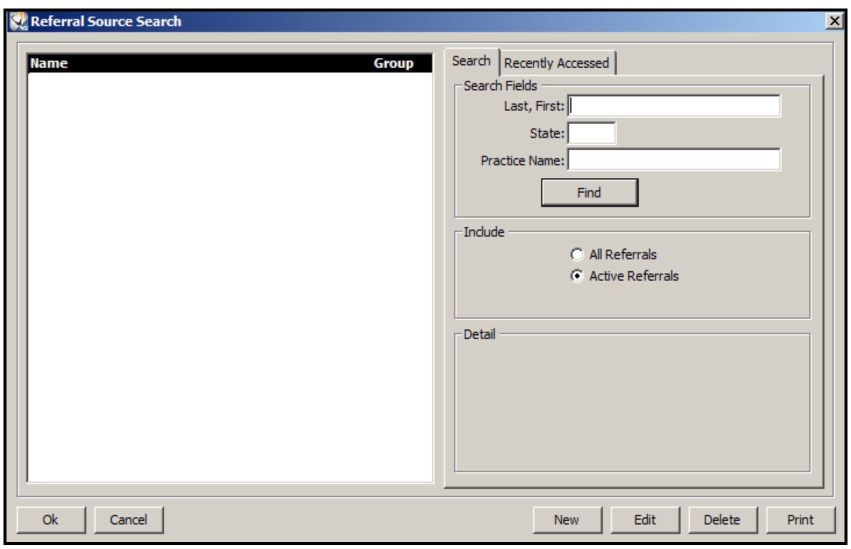
This lesson includes the following topics:

- Setting Up Referral Information
- Editing Referral Information
- Deleting Referrals
- Working with Referral Categories
- Working with Referral Interest Categories
- Tracking Referrals
- Printing Referral Reports

Setting Up Referral Information

To access the **Referral Source Data Entry** window:

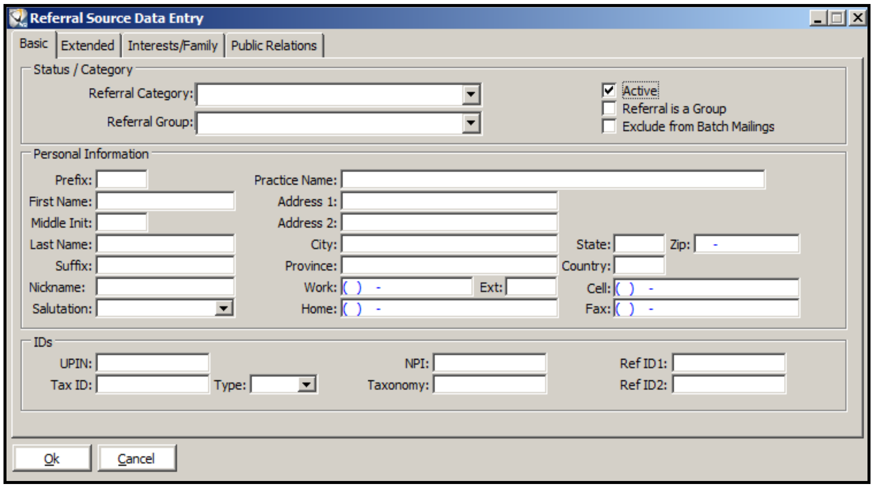
1 Select **Tables > Referrals > Referrals.** The **Referral Source Search** window is displayed.



2 Click **New.** The **Referral Source Data Entry** window is displayed.

Using the Basic Tab

When you open the **Referral Source Data Entry** window, the **Basic** tab is active.



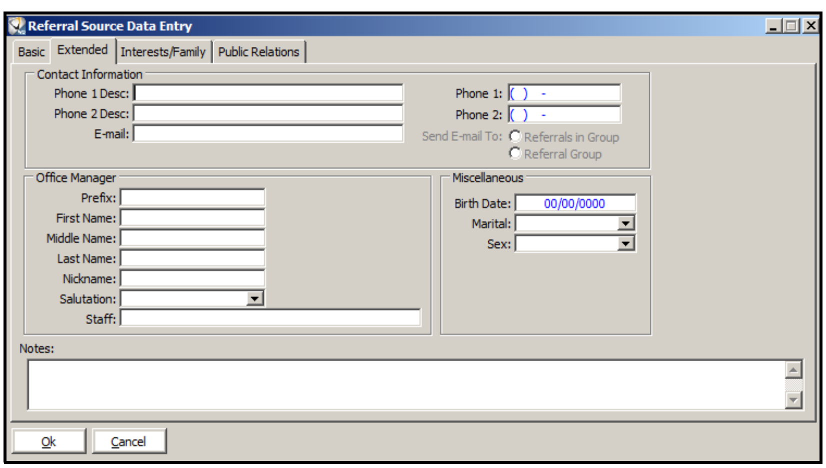
To add basic referral information:

1. In the **Referral Category** field, select a category from the drop-down list.
2. In the **Personal Information** section, type the first name, last name, salutation, address, and phone number.
3. In the **Miscellaneous** section, enter data in the **UPIN**, **Tax ID**, **Type**, **NPI**, **Taxonomy**, **Birth Date**, **Marital**, **Sex**, and **E-Mail** fields.
4. Select the **Exclude from Batch Mailings** option if you do not want the referral source to be included on mailing lists.

Using the Extended Tab

Use the **Extended** tab to provide contact information for the referral source. To add contact information:

1. Click the **Extended** tab. The **Extended** window is displayed.



2. In the **Contact Information** section, type telephone descriptions and numbers.

3 In the **Office Manager** section, type or select from a drop-down list contact information for the office manager of the referring source.

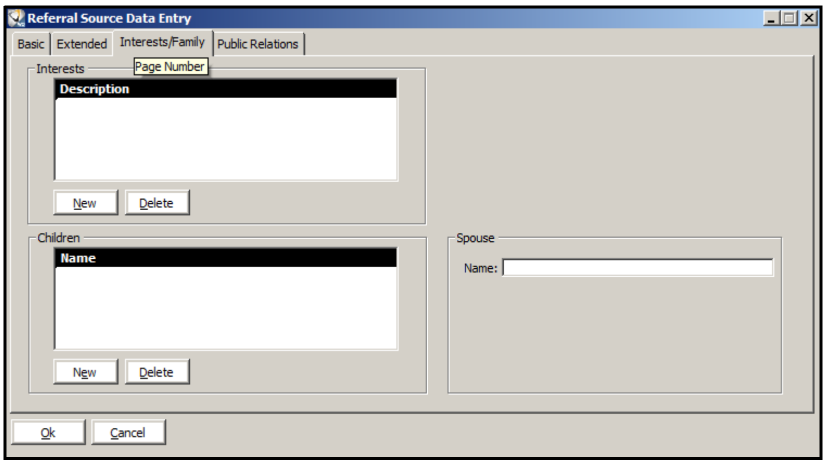
4 In the **Notes** section, type text.

5 Click **Ok**

Using the Interests/Family Tab

Use the **Interests/Family** tab to provide information about the interests and family of the referral source. To add interest and family information:

1 Click the **Interests/Family** tab. The **Interests/Family** window is displayed.



2 In the **Interests** section, click **New**. The **Referral Source Interest Search** window is displayed.

3 Type criteria in the search fields, and click **Find**, or click **Display All.** The interests matching your criteria are displayed.

4 Select a referral interest category, and click **Ok.**

5 In the **Children** section, click **New** and type the names of the children.

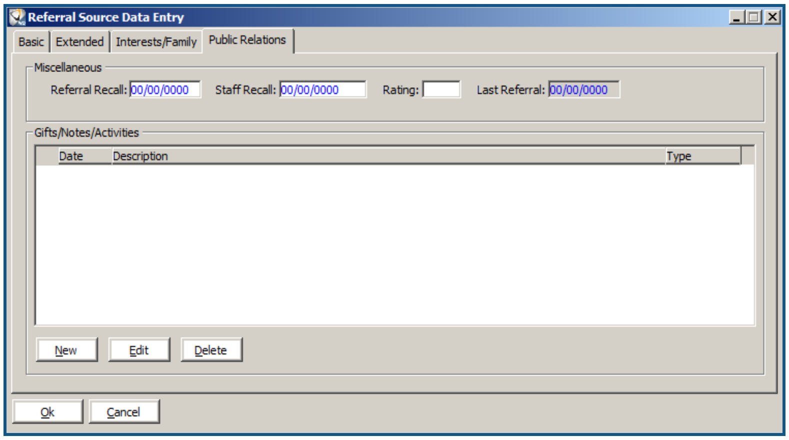
6 In the **Spouse** field, type the name of the spouse.

7 Click **Ok.**

Using the Public Relations Tab

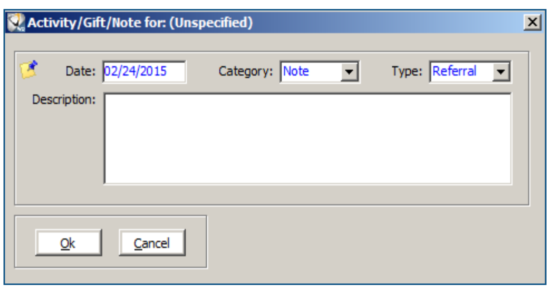
Use the **Public Relations** tab to add referral and staff recalls, the referral's rating, and notes concerning referral gifts and activities. To add public relations information:

1 Click the **Public Relations** tab. The **Public Relations** window is displayed.



2 In the **Miscellaneous** section, type referral and staff recalls and referral ratings.

3 To add information about gifts or activities associated with a referral source, click **New**. The **Activity/Gift/Note** window is displayed.



4 In the **Date** field, change the date, if necessary.

5 In the **Category** field, select a category from the drop-down list.

6 In the **Type** field, select a type from the drop-down list.

7 In the **Description** field, type a description for the gift, activity, or note.

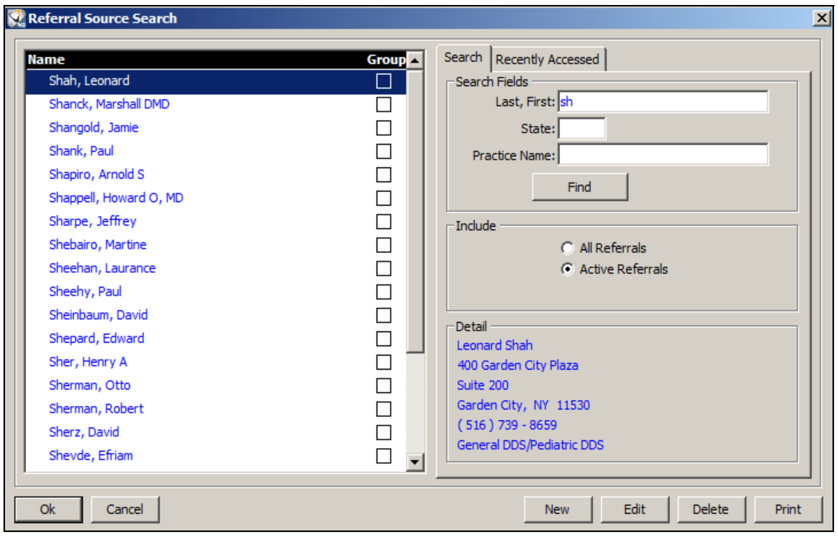
8 Click **Ok** twice.

Editing Referral Information

To change information about a referral source:

1 Select **Tables > Referrals > Referrals**. The **Referral Source Search** window is displayed.

2 Type criteria in the search fields, and click **Find**. A list of referring doctors matching your criteria is displayed.



3 Select the referral source to change.

4 Click **Edit**. The **Referral Source Data Entry** window is displayed.

5 Edit the information, and click **Ok**.

Deleting Referrals

To delete a referral source:

1 Select **Tables > Referrals > Referrals**. The **Referral Source Search** window is displayed.

2 Type criteria in the search fields, and click **Find**. A list of referring doctors matching your criteria is displayed.

3 Select a referral source to delete.

4 Click **Delete**. A confirmation message is displayed.

5 Click **Yes**.

Note: You cannot delete a referral source who has been assigned to a patient's account. You can only inactivate the referral by deselecting the **Active** option on the referral's **Basic** tab.

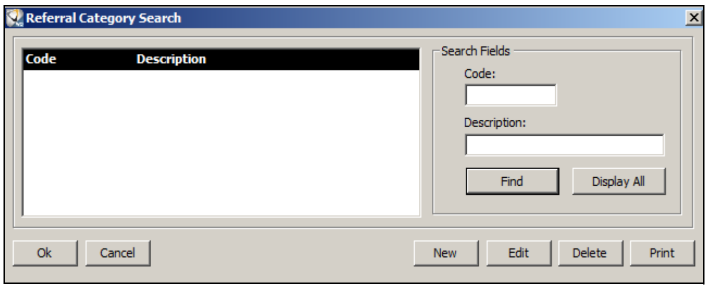
Working with Referral Categories

Referral categories enable you to sort your referrals into groups. Referral categories typically indicate the medical or dental specialties of your referrals.

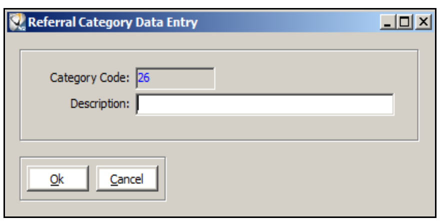
Setting Up Referral Categories

To add a referral category:

1 Select **Tables > Referrals > Categories**. The **Referral Category Search** window is displayed.



2 Click **New**. The **Referral Category Data Entry** window is displayed.



3 In the **Description** field, type a description.

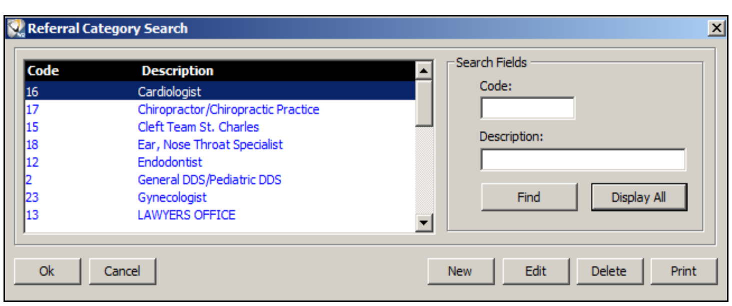
4 Click **Ok**.

Editing Referral Categories

To change a referral category:

1 Select **Tables > Referrals > Categories**. The **Referral Category Search** window is displayed.

2 Type criteria in the search fields and click **Find**, or click **Display All**. The categories matching your search criteria are displayed.



3 Select the referral category to change, and click **Edit**. The **Referral Category Data Entry** window is displayed.

4 Change the information and click **Ok**.

Deleting Referral Categories

To delete a referral category:

1 Select **Tables > Referrals > Categories**. The **Referral Category Search** window is displayed.

2 Type search criteria in the search fields and click **Find**, or click **Display All**. The categories matching your search criteria are displayed.

3 Select a category, and click **Delete**. A confirmation message is displayed.

4 Click **Yes**.

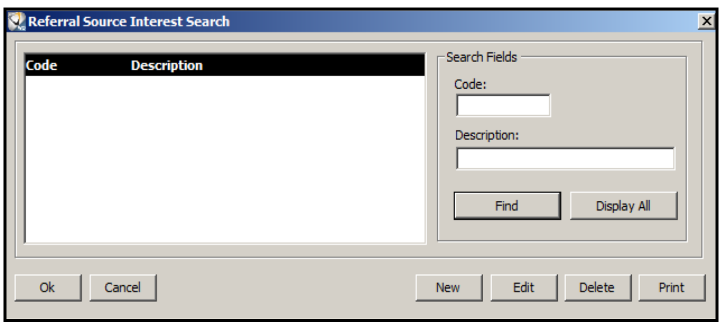
Working with Referral Interest Categories

Referral interest categories provide information about hobbies or professional organizations of a referring source. You can use these categories to generate a mailing list for all referral sources with a specific interest.

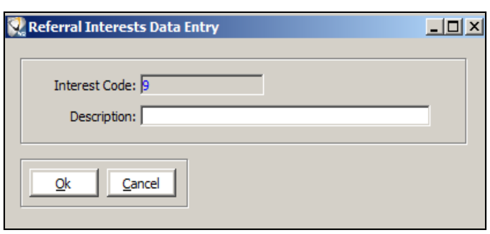
Adding Referral Interest Categories

To add a referral interest category:

1 Select **Tables > Referrals > Interests**. The **Referral Source Interest Search** window is displayed.



2 Click **New**. The **Referral Interests Data Entry** window is displayed.



3 Type a description for the referral interest code in the **Description** field.

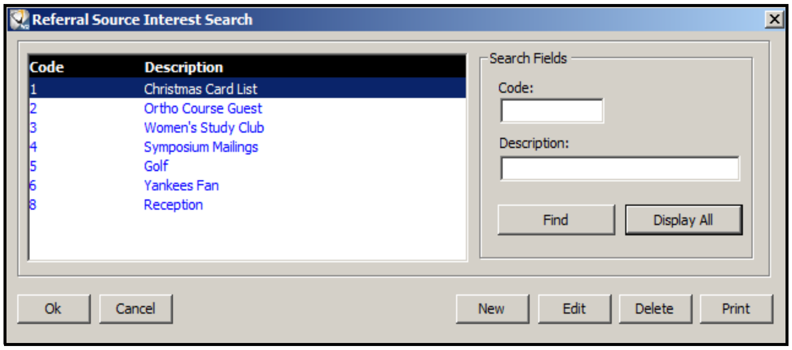
4 Click **Ok.**

Editing Referral Interest Categories

To change a referral interest category:

1 Select **Tables > Referrals > Interests**. The **Referral Source Interest Search** window is displayed.

2 Type criteria in the search fields and click **Find**, or click **Display All**. The categories matching your search criteria are displayed.



3 Select the interest category to change, and click **Edit.** The **Referral Interests Data Entry** window is displayed.

4 Change the information.

5 Click **Ok.**

Deleting Referral Interest Categories

To delete a referral interest category:

1 Select **Tables > Referrals > Interests**. The **Referral Source Interest Search** window is displayed.

2 Type criteria in the search fields and click **Find**, or click **Display All**. The categories matching your search criteria are displayed.

3 Select a category, and click **Delete.** A confirmation message is displayed.

4 Click **Yes.**

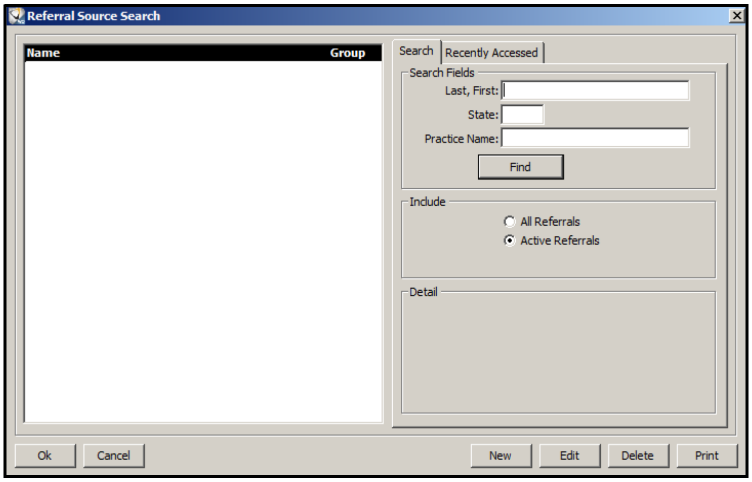
Tracking Referrals

The **Referral** window provides a list of referred patients, demographic information on referred patients, notes, and marketing information.

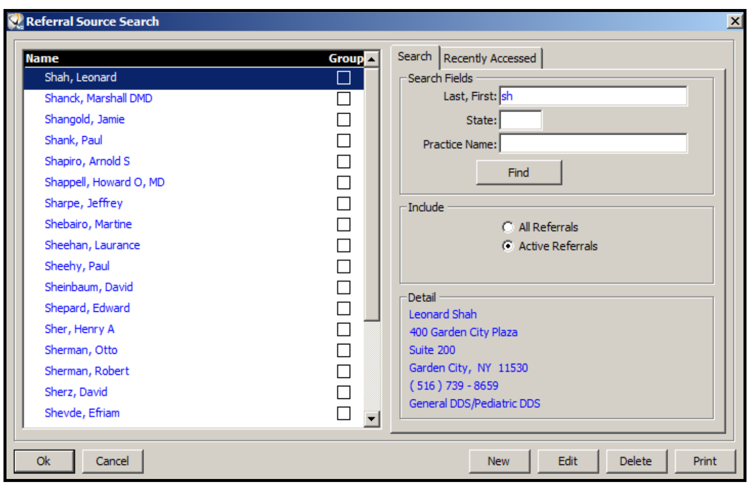
Accessing Referrals

To view information about a patient sent to you as a referral:

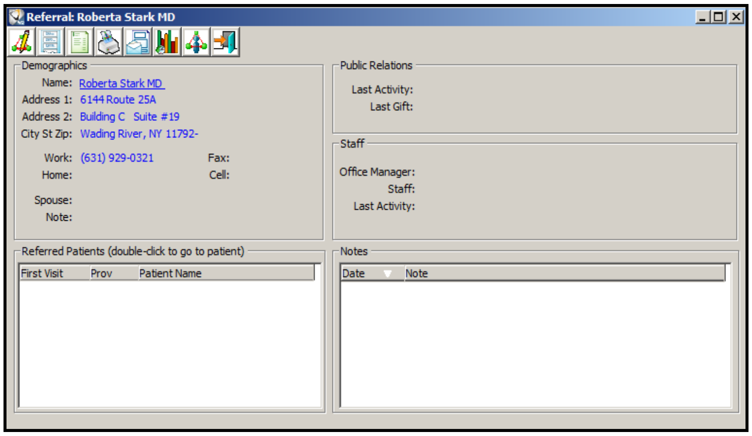
1 Click the **Referrals** button. The **Referral Source Search** window is displayed.



2 Type criteria in the search fields, and click **Find.** A list of referring doctors matching your criteria is displayed.

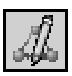


3 Double-click a doctor in the list, and the **Referral** window is displayed.



4 To view information about a patient referred to your office, double-click the patient's name. The **Patient Workspace** window is displayed.

The **Referral** window contains these buttons:

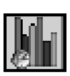
 **Edit Referral**

 **Label**

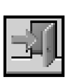
 **Financial**

 **Profile**

 **Letters**

 **Rating History**

 **Referred Out**

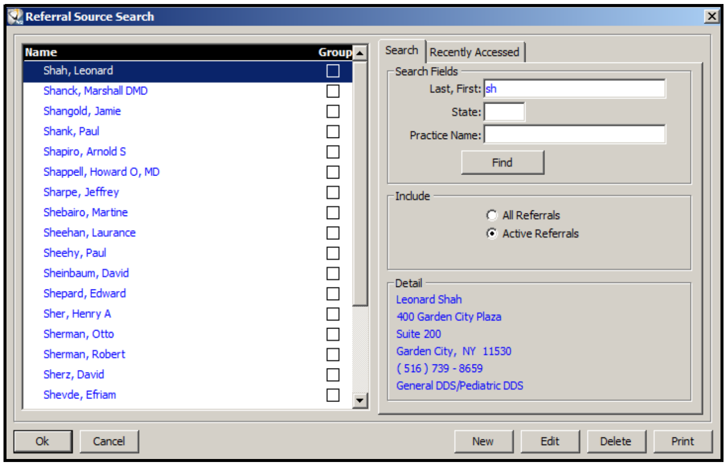
 **Close**

Tracking Patients You Refer

You can track patients that you refer to other offices. To create an entry for a patient referred to another doctor:

1 Click the **Referrals** button. The **Referrals Source Search** window is displayed.

2 Type criteria in the search fields, and click **Find**. A list of referring doctors matching the criteria is displayed.



3 Double-click a name. The **Referral** window is displayed.

4 Click the **Referred Out** button. The **Referred Out Activity** window is displayed.

5 Click **New**. The **Referred Out Entry** window is displayed.

6 Enter the criteria for the entry.

7 Click **Ok**.

Printing Referral Reports

These referral reports are available:

- **Dollar/Count**–Lists your referral sources, rankings and ratings, patient count, and financial statistics.
- **Referral Action**–Lists referring doctors or their staff members based on recall date, last activity date, last gift date, or last referral date.
- **Referral Demographic**–Lists referral sources based on demographic criteria, such as birth month or personal or professional interests.
- **Procedure Trend Analysis**–Lists procedures being referred. This report can be run for one referral source or all sources, and displays year-to-date charges by procedure category for both the current year and the previous year.
- **Zip Code Analysis**–Lists the amount of patients and the revenue generated from each zip code.
- **Ratings and Rankings**–Enables you to view and compare referrals in terms of numbers and revenue.

To run any of these referral reports, select **Reports > Referral**, and select from the menu.

Skill Sharpeners

Exercise 1—Create a Referral Category

Create a referral category for endodontists. To create the referral category:

1 Select **Tables > Referrals > Categories**. The **Referral Category Search** window is displayed.

2 Click **New**. The **Referral Category Data Entry** window is displayed.

3 Type the description **Endodontists.**

4 Click **Ok**.

Exercise 2—Delete a Referral Category

Delete the referral category you just created. To delete the referral category:

1 Select **Tables > Referrals > Categories**. The **Referral Category Search** window is displayed.

2 Type the description you used in the **Description** field. If you do not remember the description, click **Display All**.

3 From the list, select the category that you want to delete.

4 Click **Delete**.

Exercise 3—Print a Referral Report

Print a report for the last calendar month that lists the number of patients from various zip codes who have been referred to you and the dollar amounts of those referrals. To print the Zip Code Analysis report:

1 Select **Reports > Referrals > Zip Code Analysis**. The **Referral Zip Code Analysis** window is displayed.

2 Select the **All zip codes** option, and enter the date range of the last month.

3 Click **Print**.

7 Working with Prescriptions

This lesson includes the following topics:

- Entering Prescriptions
- Printing Prescription Reports
- Printing Prescription Reports

Entering Prescriptions

To enter prescription information:

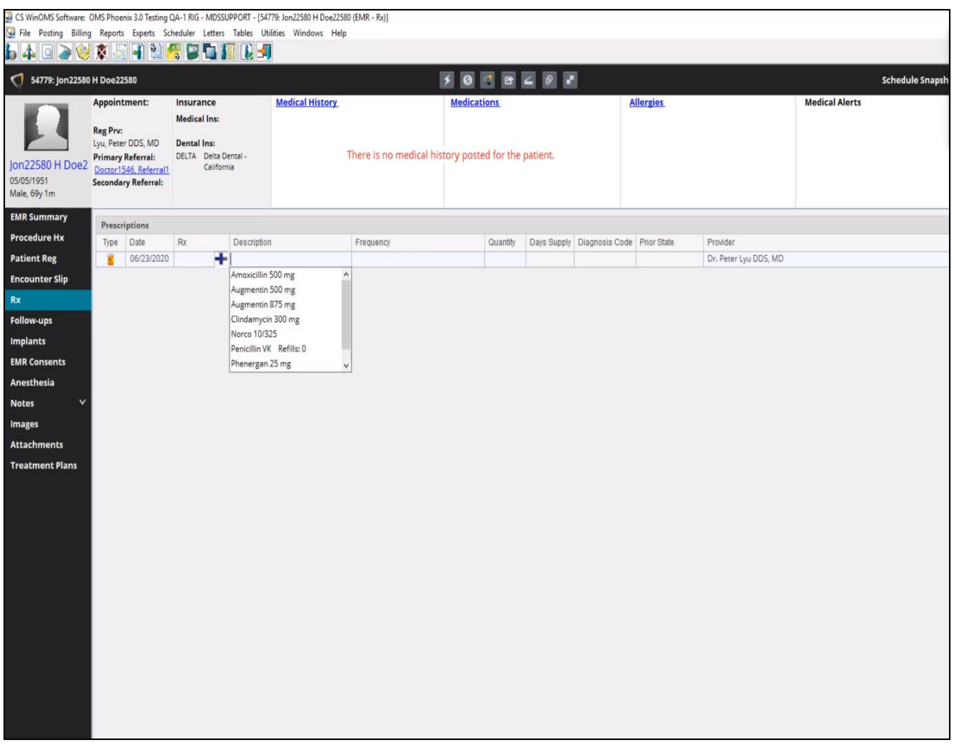
1 Select **Tables > Patients > Patients.** The **Patient Search** window is displayed.

2 Type criteria in the search fields, and click **Find.** The patients matching your criteria are displayed.

3 Select a patient, and click **Ok.** The **Patient** window is displayed.

4 Click **EMR.**

5 Click **Rx.** The **EMR - RX** window is displayed with a drop-down list of drugs and dosage amounts in the **Description** column.



6 Select or search for a drug by typing the first few letters of the drug name. A new line item is created.

7 From the drop-down list in the **Rx** column, select a prescription code. The **Description**, **Dose**, **Frequency**, and **Provider** columns are populated automatically.

8 Click .

Re-Prescribing

To prescribe a prescription again, select it in the list and click . A new line item is added with the copied information.

Voiding Prescriptions

Once a prescription has been printed, it cannot be deleted from a patient's record, but it can be voided if you have the appropriate security level permission. When a prescription is voided, it is still displayed in the Rx list, but it will not be included in reports, unless the option to include voided prescriptions has been selected in the Patient Prescription report.

To void a prescription:

1. Select it and click . The **Create Patient Rx Note** window is displayed.
2. Enter a reason for the void and click **Ok.** The note is saved with the voided prescription, which is grayed out.

Note: Saved notes cannot be edited, but you can double-click the note to view it and click **{A}** to add information to the note.

Printing Prescriptions

To print a prescription:

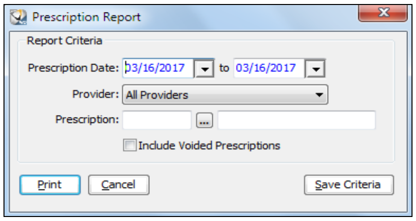
1. Select **Tables > Patients > Patients**. The **Patient Search** window is displayed.
2. Type criteria in the search fields, and click **Find.** The patients matching your criteria are displayed.
3. Select a patient, and click **Ok**. The **Patient** window is displayed.
4. In the **EMR** window, click **Rx.**
5. Select the prescription and click . The **Print Prescription(s)** for window is displayed.

   Tip: To print more than one, press Ctrl and select the prescriptions.
6. Click **Print.**

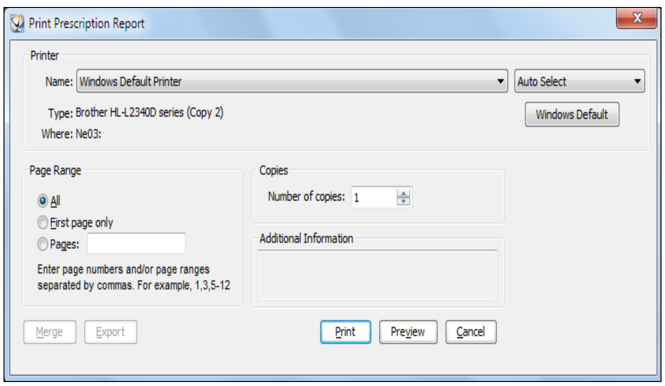
Printing Prescription Reports

The prescription report lists all prescriptions generated in a specific period of time or for a specific type of medication. To print a prescription report:

1 Select **Reports > Patient > Prescription**. The **Prescription Report** window is displayed.



2 Set the options, and click **Print**. The **Print Prescription Report** window is displayed.



3 Click **Preview** to view the report before it prints.

4 Click **Print** to print the report.

Tip: To access the WinOMS ePrescriptions service, click .

Skill Sharpeners

Exercise 1—Check Prescriptions for a Patient

You are asked if a particular patient has any prescriptions on file. To find prescriptions:

1 Select **Tables > Patients > Patients.** The **Patient Search** window is displayed.

2 Enter the first three letters of the patient's last name in the **Last, First** field, and click **Find.** A list of patients is displayed.

3 Select the patient, and click **Ok.** The **Patient** window is displayed.

4 Click **EMR**, and then click **Rx.** A list of the prescriptions for the patient is displayed.

Exercise 2—Add a Prescription

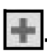
You need to prescribe an antibiotic for a patient. To add a prescription:

1 Select **Tables > Patients > Patients**. The **Patient Search** window is displayed.

2 Enter the first three letters of the patient's last name in the **Last, First** field, and click **Find**. A list of patients is displayed.

3 Select the patient, and click **Ok.** The **Patient** window is displayed.

4 Click **EMR**, and then click **Rx.** A list of the prescriptions for the patient is displayed.

5 Click . A new line item is created.

6 From the drop-down list in the **Rx** column, select the code for erythromycin.

7 Click .

Exercise 3—Print a Report for a Specific Prescription for All Providers

To print the report:

1 Select **Reports > Patient > Prescription**. The **Prescription Report** window is displayed.

2 Select the date range you want—the last calendar month—and select **All Providers.**

3 Click the ellipsis button. The **Prescription Search** window is displayed.

4 Click **Display All.** All of the prescription types are displayed.

5 Double-click the prescription you want. The **Prescription Report** window is displayed.

6 Click **Print** twice.

8 Using Alerts

This lesson includes the following topics:

- Adding Alerts
- Changing Alerts
- Deleting Alerts
- Printing Alerts

Patient alerts are displayed automatically when you access a patient's record. You can also access alerts by clicking **Alerts** at the top of the **Patient** window or the **Alerts** tab at the bottom of the **Workspace** window.

These types of alerts are available:

- Medical–A medical alert is added if the patient has an allergy or a health condition.
- Financial–A financial alert is typically used to communicate issues, such as a history of bad debt. When a financial alert is added, a green icon is displayed under the global toolbar in the patient record.
- Personal–A personal alert is used for information about a patient. When a personal alert is added, a blue icon is displayed under the global toolbar in the patient record.

An alert is displayed every time you make an appointment for a patient who has alerts.

Note: Use contact notes, not alerts, to display benefits information.

Adding Alerts

To add an alert to a patient's record:

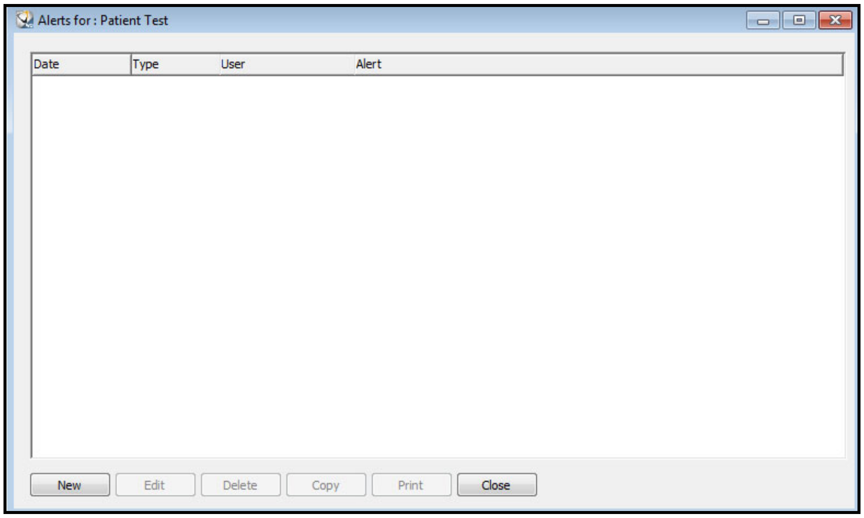
1 Select **Tables > Patients > Patients**. The **Patient Search** window is displayed.

2 Type criteria in the search fields, and click **Find.** A list of records matching your search criteria is displayed.

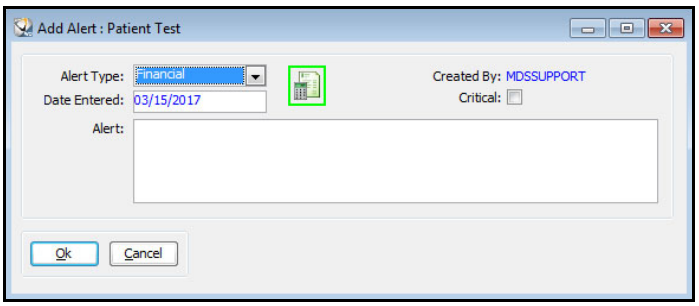
3 Double-click the name of the patient for whom you want to add an alert. If any alerts have already been associated with this patient, a list is displayed. Click **Close**, and the **Patient** window is displayed.

4 Click **Alerts** at the top of the **Patient** window.

The **Alerts** window for the patient is displayed.



5 Click **New**. The **Add Alert** window is displayed.



6 In the **Alert Type** field, select a category of alert from the drop-down list.

7 Change the date in the **Date** field, if necessary.

8 In the **Text** field, type the message you want for this alert.

9 Select **Critical**, if necessary. Critical alerts are displayed with a red exclamation point at the top of the alerts message.

10 Click **Ok** and **Close**.

Changing Alerts

To change an alert in a patient's record:

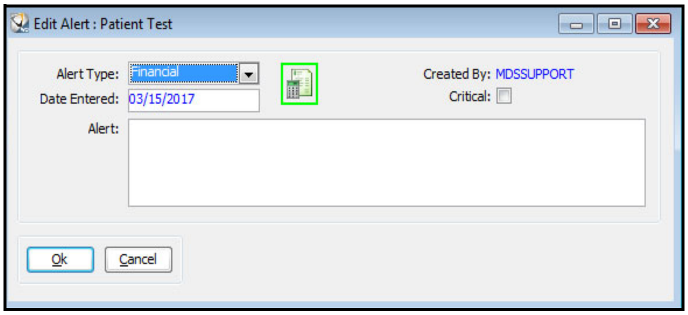
1 Select **Tables > Patients > Patients.** The **Patient Search** window is displayed.

2 Type criteria in the search fields, and click **Find.** A list of records matching your search criteria is displayed.

3 Double-click the name of the patient. The **Patient** window is displayed.

4 Click **Alerts.** The **Alerts** window is displayed.

5 Select the alert you want to change, and click **Edit.** The **Edit Alert** window is displayed.



6 Edit the alert.

7 Click **Ok** and **Close.**

Deleting Alerts

1 Select **Tables > Patients > Patients.** The **Patient Search** window is displayed.

2 Type criteria in the search fields, and click **Find.** A list of records matching your search criteria is displayed.

3 Double-click the name of the patient. The **Patient Workspace** window is displayed.

4 Click the **Alerts** tab. The **Alerts** window is displayed.

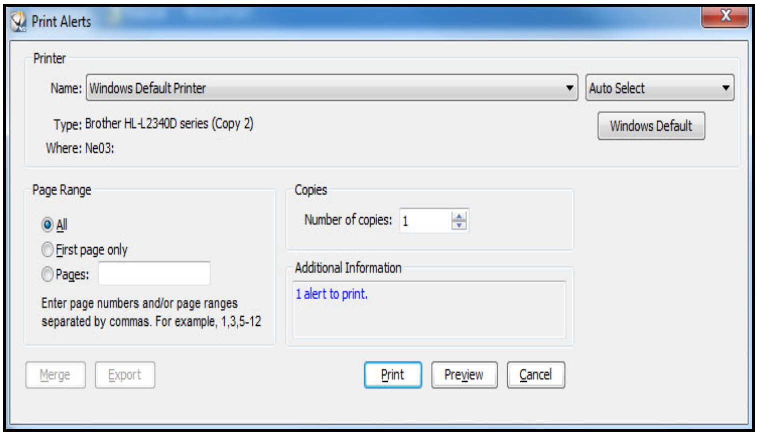
5 Select the alert that you want to delete, and click **Delete.** A confirmation message is displayed.

6 Click **Yes** and **Close.**

Printing Alerts

To print an alert:

1 In the **Alerts** window, select an alert, and click **Print.** The **Print Alerts** window is displayed.



2 Select the print options you want.

3 Click **Print.**

Skill Sharpeners

Exercise 1—Check for Alerts for a Patient

To find out if a patient has any alerts, locate the patient's record and click **Alerts** in the **Patient** window. If there are alerts, the **Alerts for [patient name]** window is displayed.

Exercise 2—Create a Medical Alert

Create a medical alert for one of your patients. To create a medical alert:

1. Go to the **Patient Search** window.
2. Find a patient and double-click on the name. The **Patient** window is displayed.
3. Click **Alerts**. The **Alerts** window is displayed.
4. Click **New**. The **Add Alert** window is displayed.
5. Change the **Alert Type** to **Medical**.
6. In the **Text** field, type the message you want for this alert; for example, **high blood pressure**.
7. Click **Ok** and **Close**.

Exercise 3—Delete a Medical Alert

Delete the medical alert that you just created. To delete the alert:

1. Go to the **Patient Search** window.
2. Find the patient for whom you added the alert.
3. Double-click the name of the patient. The **Patient** window is displayed.
4. Click **Alerts**. The **Alerts** window is displayed.
5. Select the alert you want to delete, and click **Delete.** A confirmation message is displayed.
6. Click **Yes** and **Close**.

9 Using Encounter Slips

Encounter slips enable you to enter details regarding patient visits, including diagnoses, shortcuts, pre-treatments, procedures, prescriptions, recalls, letters, and notes. You are also able to create actual, as well as PTE, charges for a specific ticket.

Creating Encounter Slips

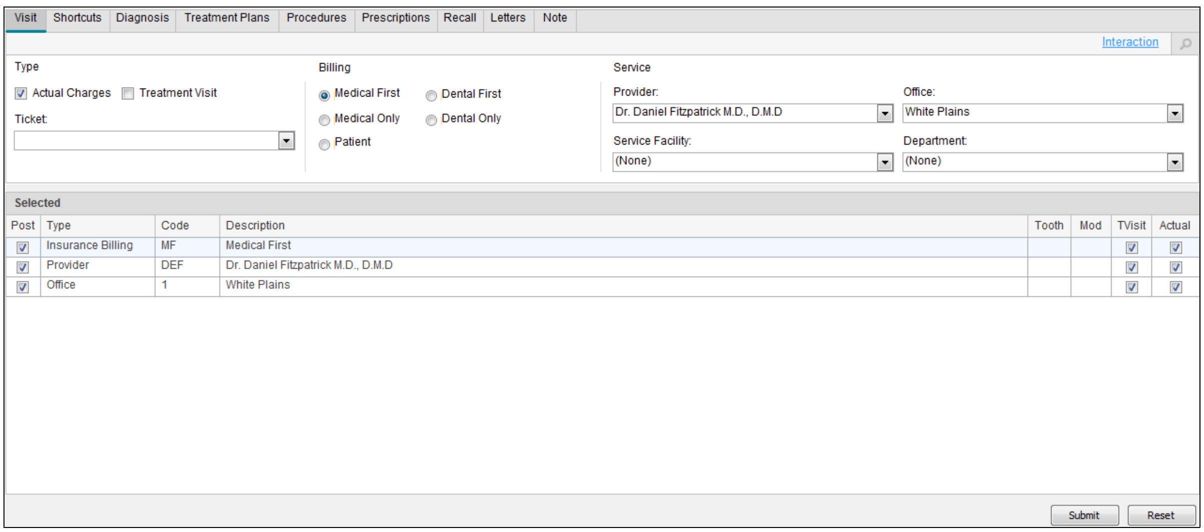
To create an encounter slip:

1 Select **Tables > Patients > Patients**. The **Patient Search** window is displayed.

2 Type criteria in the search fields, and click **Find**. A list of records matching your search criteria is displayed.

3 Double-click the name of the patient for whom you want to add an alert. If any alerts have already been associated with this patient, a list is displayed. Click **Ok**, and the **Patient** window is displayed.

4 In the **EMR** window, click **Encounter Slip**. The **Visit** tab is displayed first.



5 Select a **Type** and **Ticket** type from the list.

6 Click the **Shortcuts** tab to group related data, such as a set of procedures commonly associated with a specific diagnosis, along with related prescriptions, letters, and recalls. Use the shortcut categories to select details about the patient's visit.

7 Click the **Diagnosis** tab to select diagnosis codes for the visit. Use the **Categories** list to filter the codes displayed. Categories are based on the type of visit selected.

8 Click the **Treatment Plans** tab to select elements and details from the patient's treatment plan to include in this encounter.

9 Click the **Procedures** tab to select teeth and the associated procedures. Use the **Show/Hide Tooth Grid** option to toggle between tooth numbers and procedures.

10 Click the **Prescriptions** tab to add prescriptions to the encounter.

11 Click the **Recall** tab to select the appropriate recall code.

12 Click the **Letters** tab to select a letter to attach or send in response to the encounter.

13 To save the encounter, click **Submit**.

14 To discard an encounter, click **Reset**.

Note: You can use the **Interaction** link to access the Lexicomp Data Integration feature for the patient's medications and prescriptions.

Skill Sharpeners

Exercise 1—Create and Delete an Encounter Slip

To create an encounter slip for a patient and then delete it:

1. Find and select the patient for whom you are creating an encounter slip.
2. Click **EMR**.
3. Click **Encounter Slip**.
4. In the **Type** field, select **Actual Charges**. In the **Ticket** field, select **Trauma Evaluation**.
5. In the **Billing** field, select **Dental First**.
6. Verify that the information in the **Service** section is correct.
7. Click the **Diagnosis** tab and select code **525.11 - Loss of teeth/trauma**.
8. Click the **Procedures** tab and select **D0150 - Oral Exam - expanded**.
9. Click the **Note** tab and type notes about the encounter.
10. Click **Reset**.

10 Using EMR Consent Forms

This lesson includes the following topics:

- Setting Up Consent Forms
- Adding Consent Forms

When the EMR Components module is licensed, you can attach consent forms to a patient's appointment, have the patient sign it digitally, and store it for easy retrieval and viewing. You can link consent forms to appointment types, so that the correct form is attached to an appointment when it is scheduled. When the patient arrives for the appointment, you are prompted to complete the consent forms and obtain a signature.

EMR consent forms have one of three statuses:

- **Queued**–Attached consent form has not been started or completed.
- **In Progress**–Attached consent form has been started but not yet completed.
- **Complete**–Attached consent form has been completed. Once a form is completed, you are prompted to lock the form.

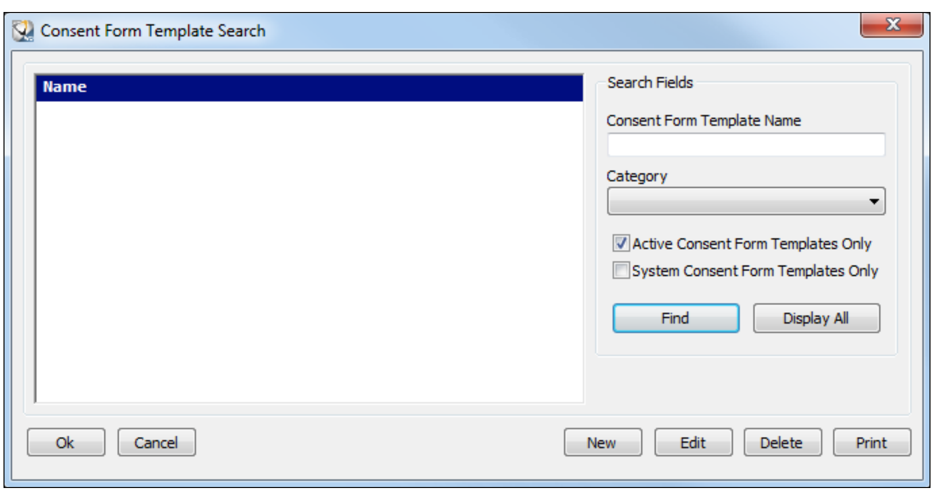
Setting Up Consent Forms

To use the EMR Components Consent Forms feature effectively, you must create the consent forms you need and then link them to appointment types. It is recommended that you set up the print layout for these forms.

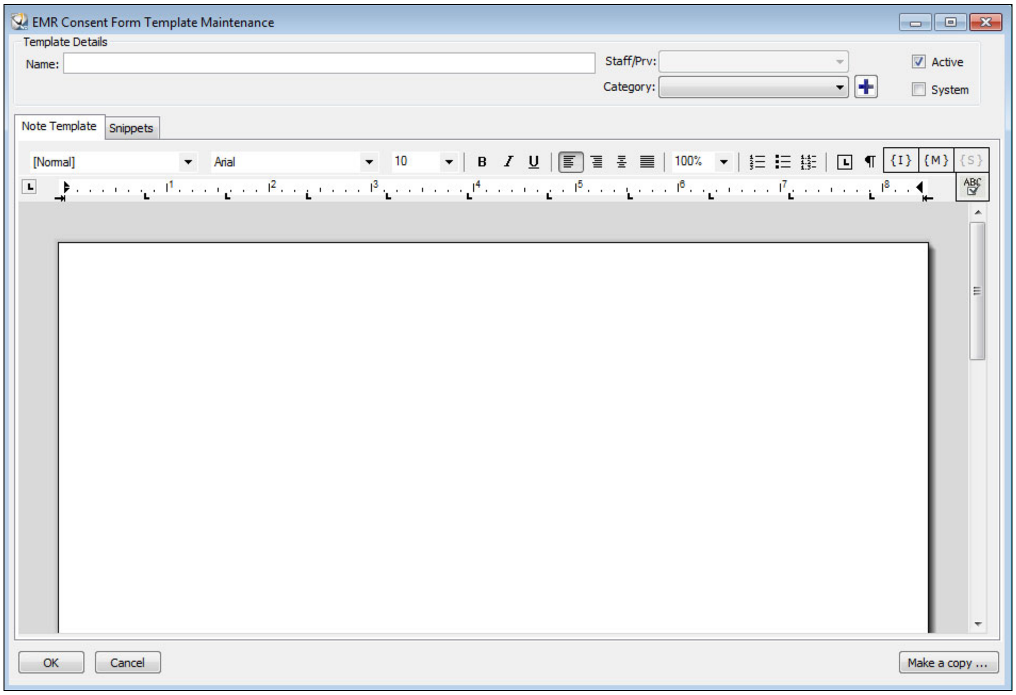
Creating Consent Form Templates

To create a consent form template:

1 Select **Tables > EMR Components > Consent Form Templates**. The **Consent Form Template Search** window is displayed.



2 Select **New**. The **EMR Consent Form Template Maintenance** window is displayed.



3 In the **Name** field, enter a name for the consent form.

4 In the **Category** field, select a category.

5 Click the **Note Template** tab and type the content for this template. Use the formatting tools to set the font, style, and layout.

6 To insert items into the template, use the options on the right of the formatting toolbar:

- **{I}** to insert an image
- **{M}** to choose from a list of available merge fields
- **{S}** to insert a snippet

7 Click to check the spelling of the template.

8 Click **Ok.** The template is available for selection from the **Consent Forms Template Selection** list.

Note: To add a new category while creating a template, click next to the **Category** field.

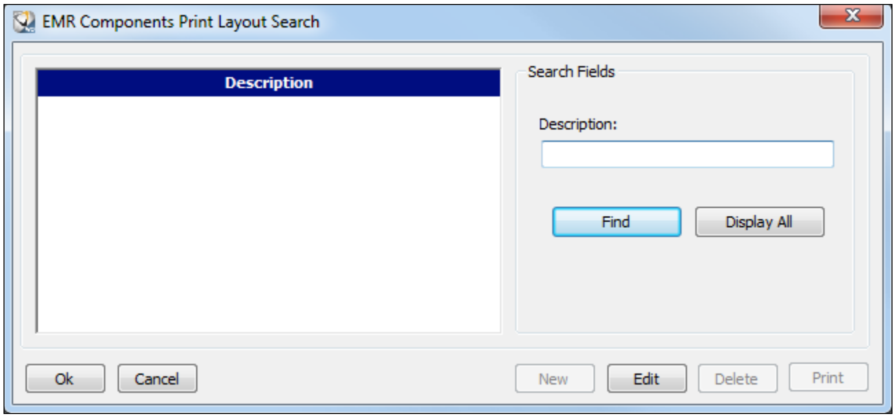
Designing Print Layouts for Forms

To standardize the look of your Consent Form templates, use the **Print Layout** window. The **Opening Text** and **Closing Text** options enable you to define what appears above and below the content of each note or form. You can also insert an image or logo for a letterhead appearance, and you can include provider signatures on the templates.

Note: The print layout must be set up in order to use the **Create PDF** feature to save the form as a PDF file and print it.

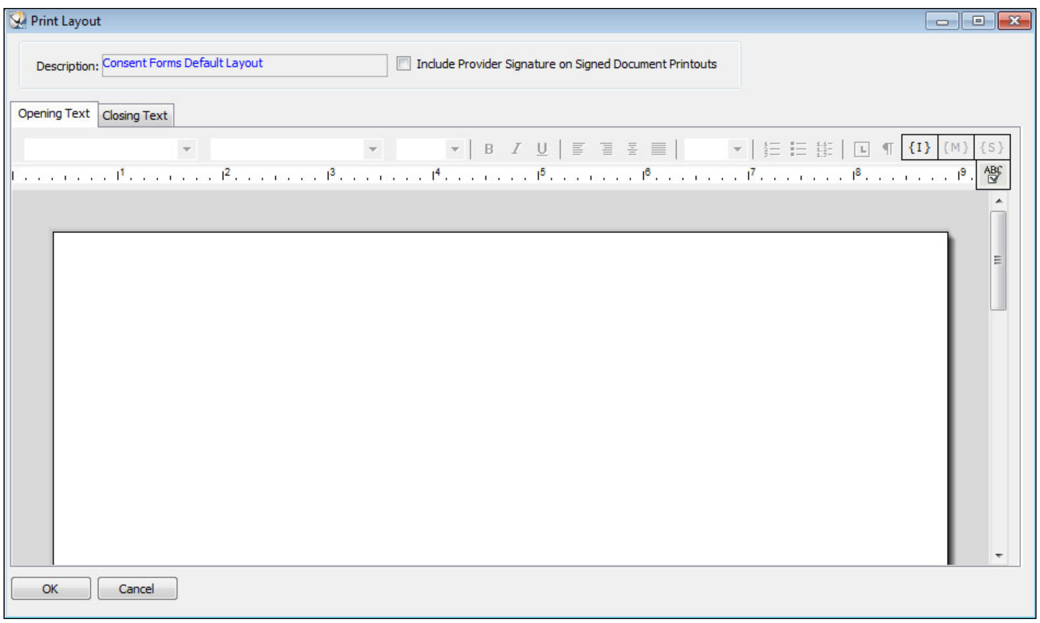
To set up the print layout for consent forms:

1 Select **Tables > EMR Components > Print Layouts.** The **EMR Components Print Layout Search** window is displayed.



2 Use the search features to find and select the **Consent Forms Default Layout.**

3 Click **Edit.** The **Print Layout** window is displayed with the **Opening Text** tab selected.



4 Enter the standard text to appear above the content of the consent form. Click **{I}** to insert an image.

5 Click **Closing Text**, and enter the text to appear below the content of the note.

6 Click  to check the spelling of the layout.

7 If you want provider signatures inserted, select **Include Provider Signature on Signed Document Printouts.**

8 Click **Ok.**

Linking Consent Forms

To link consent forms to appointment types:

1 Select **Tables > Appointments > Types**. The **Appointment Type Search** window is displayed.

2 Search for an appointment type or click **Display All**.

3 Select the appointment type, and click **Edit**. The **Appointment Type Data Entry** window is displayed.

4 Click the **Consent Forms** tab. The list of consent forms is displayed.

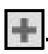
5 Select the checkbox for each form you want to associate with this appointment type.

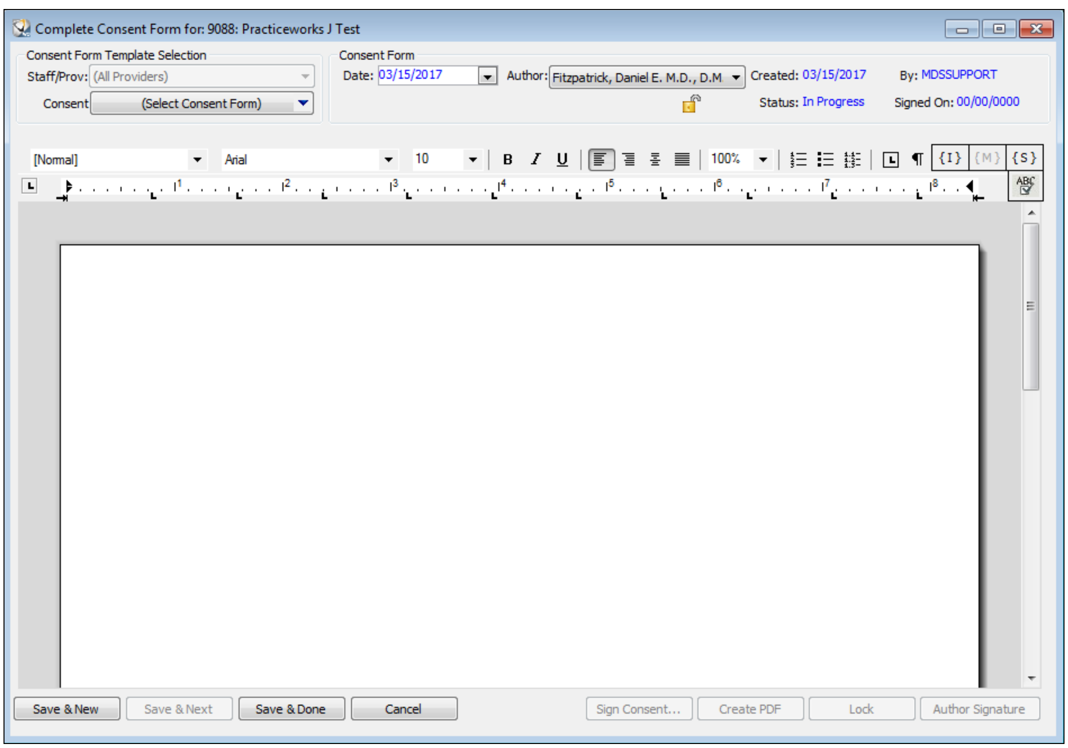
6 Click **Ok**.

Adding Consent Forms

To add a consent form:

1 In the **EMR** window, click **EMR Consents**.

2 Click . The **Complete Consent Form** window is displayed.



3 Under **Consent Form Template Selection**, use the drop-down list to select a form. The template for that form is displayed in the editor.

4 Use the editing tools to adjust the content of the form, if necessary.

5 To get the patient's signature on the form, click **Sign Consent**. The **Please Sign Tablet** window is displayed.

6 Have the patient sign the form, and click one:

- **Save & New**–Saves the current consent form and leaves the **Consent Form** window open to select a new form.
- **Save & Next**–Saves the current consent form and retrieves the next form attached to the appointment that has not been completed.
- **Save & Done**–Saves current consent form and closes the Consent Form window.

7 Click **Create PDF** to create a PDF document for printing or e-mailing.

8 Click **Lock** to lock the completed form.

Note: When an appointment exists with a consent form attached, a notification is displayed in the **Chart Status** portion of the **EMR** window.

Filling Out and Signing Forms

When a consent is needed for an appointment:

1 From the **Patient** window, select **EMR > EMR Consents**. A list of consents for the patient is displayed, with the newest first, and any pending forms open in the **Preview** panel.

2 Complete any pending forms for the appointment.

3 Obtain a signature and lock the form.

Skill Sharpener

Exercise 1—Add an EMR Consent Form

A patient comes to your office for surgery and needs to verify that he has had no food. To add the form:

1 Find and select the patient for whom you need the consent form.

2 Click **EMR**.

3 Click **EMR Consents**.

4 Click . The **Complete Consent for** window is displayed.

5 In the **Consent** field, click the **Consent** drop-down arrows and select **Day of Surgery (No Food)**.

6 Fill out the form and click **Sign Consent**.

7 To give the patient a copy of the form, click **Create PDF** and click .

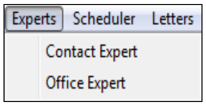
8 Click **Save and Done**.

11 Using Experts

This lesson includes the following topics:

- Using the Contact Expert
- Using the Office Expert

To access the Contact Expert or the Office Expert, select **Experts**. The **Experts Menu** is displayed.



Using the Contact Expert

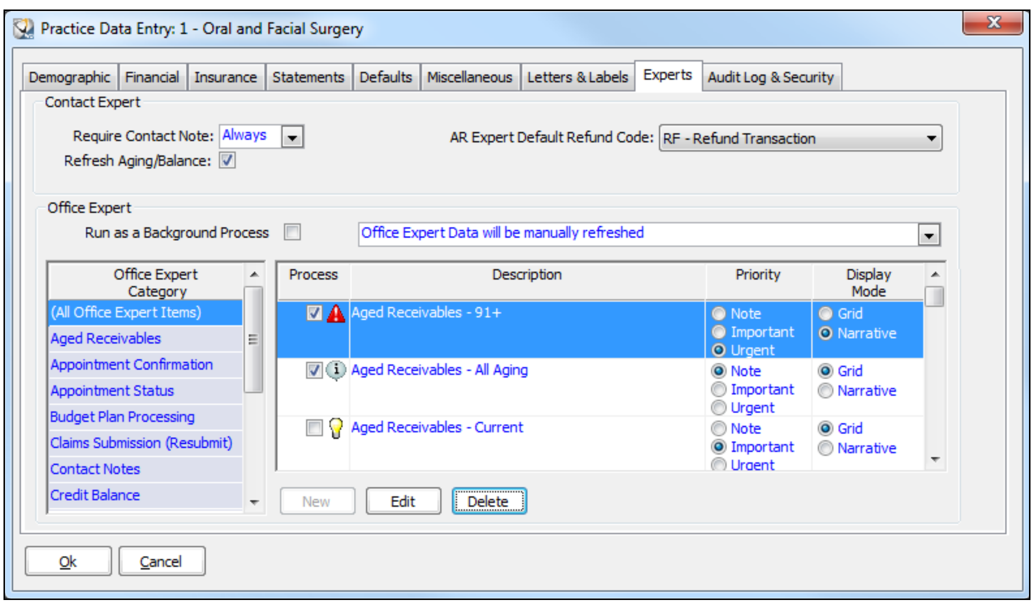
With the **Contact Expert**, you can automate your office communications with patients, insurance companies, and referral sources. You can create and manage lists of contacts, such as a list of patients whose claims need to be resubmitted.

Setting Contact Experts Preferences

To set the Contact Expert options:

1 Select **Tables > Practice > Practice Preferences.** The **Practice Data Entry** window is displayed.

2 Click the **Experts** tab. The **Experts** window is displayed.



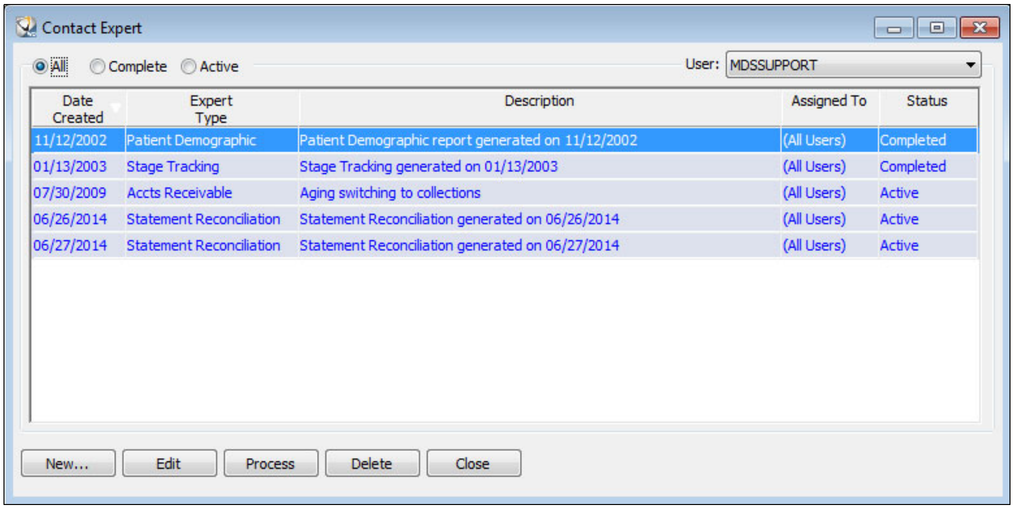
3 In the **Contact Expert** section, select one of these from the **Require Contact Note Field**:

- **Always**
- **Never**
- **Prompt**

4 Select the **Refresh/Aging/Balance** option if you want the current aging displayed each time the expert is processed.

Displaying the Contact Expert

To display the Contact Expert, select **Experts > Contact Experts.** The **Contact Expert** window is displayed.



This information is displayed for each item in the **Contact Expert** list:

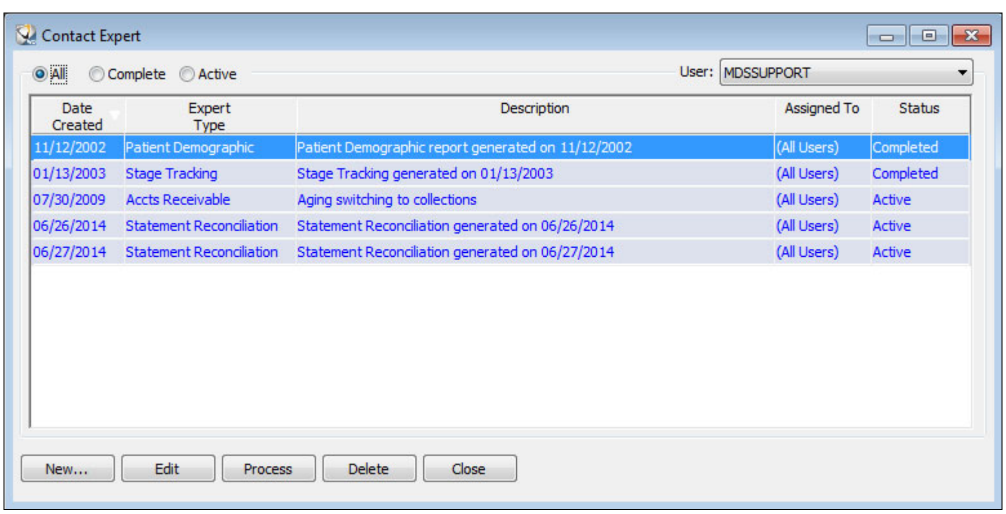
- Date when the expert was created
- Type of expert
- Description of what the expert does
- Name of the user assigned to complete the task or **All Users**
- Status of the expert

When you open the **Contact Expert** window, all active Contact Experts are displayed for the current user. To change the display, select one of the buttons at the top-left of the window: **All**, **Complete**, or **Active**.

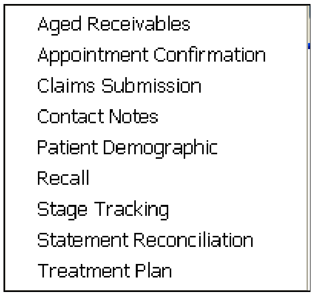
Creating Lists with the Contact Expert

You can create Contact Expert lists for different categories. To create a Contact Expert list:

1 Select **Experts > Contact Experts.** The **Contact Expert** window is displayed.



2 Click **New.** A list of categories is displayed.



3 Select a category, and the corresponding window is displayed.

4 Select options to define the criteria for the Contact Expert list.

5 Click **Ok.** The Contact Expert list is displayed in the **Contact Expert** window.

6 Enter a name in the **Description** field.

7 Click **Ok.**

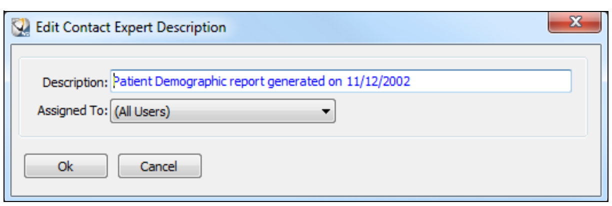
Editing Contact Expert Lists

Use the **Contact Expert** window to edit a description and the name of the person to whom a task is assigned. To edit a Contact Expert list:

1 Select **Experts > Contact Experts.** The **Contact Expert** window is displayed.

2 Select a Contact Expert list.

3 Click **Edit.** The **Edit Contact Expert Description** window is displayed.



4 Change the **Description** and **Assigned to** fields.

5 Click **Ok.**

Deleting Contact Expert Lists

To delete a Contact Expert list:

1 Select **Experts > Contact Experts.** The **Contact Expert** window is displayed.

2 Select a Contact Expert list.

3 Click **Delete.** A confirmation message is displayed.

4 Click **Yes.**

Processing Contact Experts

When you process a Contact Expert list, you set up criteria for actions to be performed. These actions are available for all Contact Expert lists:

- Open the **Patient Activity** window.
- Open the **Ledger** window.
- Print labels and envelopes.
- Merge a letter.
- Open **Contact Notes**.

To process a Contact Expert list:

1. Select **Experts > Contact Experts**. The **Contact Expert** window is displayed.
2. Select a Contact Expert list.
3. Click **Process**, and the corresponding window is displayed.

To perform an action on multiple patients in a list:

1. In the **Contact Expert** window, double-click a Contact Expert list. The corresponding window is displayed.
2. In the **Batch Actions** column, click the action icons next to each patient for whom the action is needed. The actions you select are indicated with a red checkmark.
3. Click **Take Action**.

Using the Office Expert

Using Office Expert, you can generate a daily report of important events that need your attention. For example, the Office Expert can produce a list of patients who have had outstanding balances for a specified period of time.

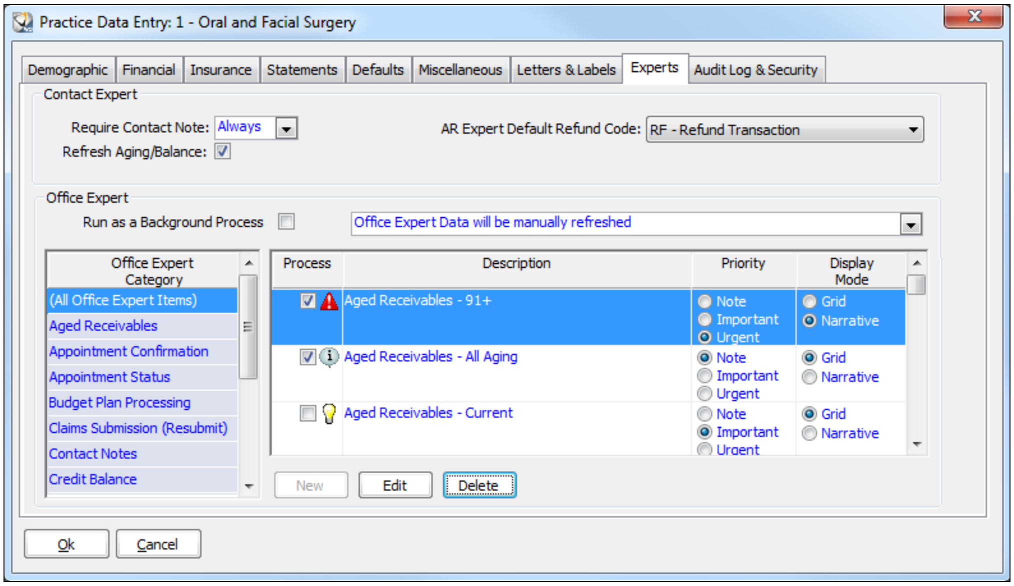
Office Expert lists are defined by the user on the **Experts** tab of the **Practice Preference** window. When Office Expert lists are defined, you have immediate access to information tailored to your needs.

Setting the Office Expert Preferences

To set the Office Expert options:

1. Select **Tables > Practice > Practice Preferences**. The **Practice Data Entry** window is displayed.
2. Click the **Experts** tab.

The **Experts** window is displayed.



3 In the **Office Expert** section, if you want to continue working while the Office Expert database is refreshed, select the **Run as a Background Process** option.

4 In the field to the right of the **Run as a Background Process** option, select an option:

- **Remind the FIRST person that logs on in the morning to refresh the Office Expert data**
- **Remind the LAST person that logs out in the afternoon to refresh the Office Expert data**
- **Office Expert data will be manually refreshed**—Click the **Refresh** button in the **Office Expert Summary** window to refresh the data.

5 In the list of Office Expert items, set these options:

- **Process**—If **Process** is selected, the item is generated, and the results are accessible from the **Office Expert** window. If **Process** is not selected, the item is defined, but it is not generated.
- **Description**—Write a description of the item.
- **Priority**—Select a priority level: **Note**, **Important**, or **Urgent**. A note item has a blue icon; an important item has a yellow icon; an urgent item has a red icon.
- **Display Mode**—Select how to display generated items. **Grid** displays a table; **Narrative** displays text.

Defining Aged Receivables Expert Items

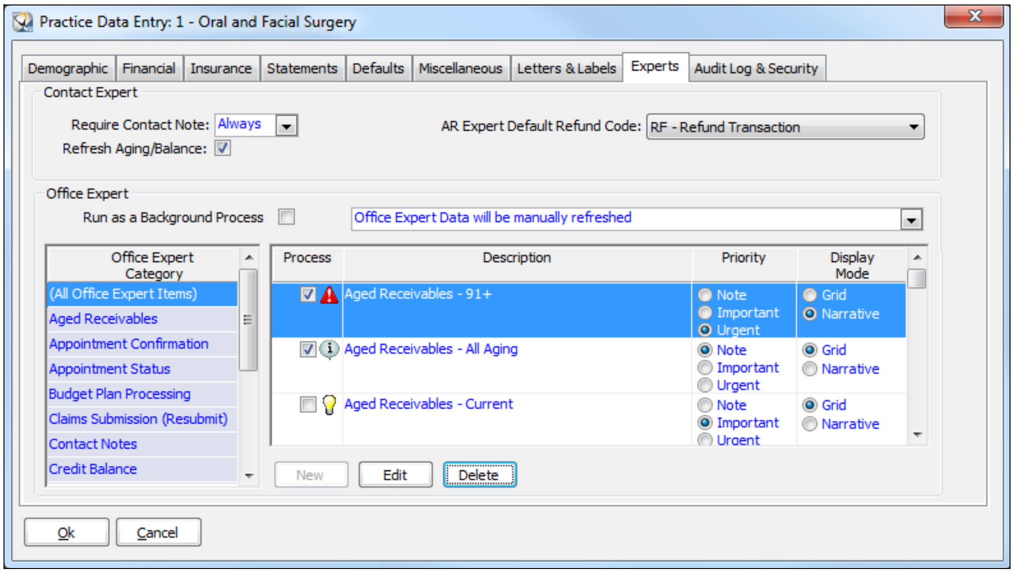
To define an aged receivables list:

1 Select **Tables > Practice > Practice Preferences.** The **Practice Data Entry** window is displayed**.**

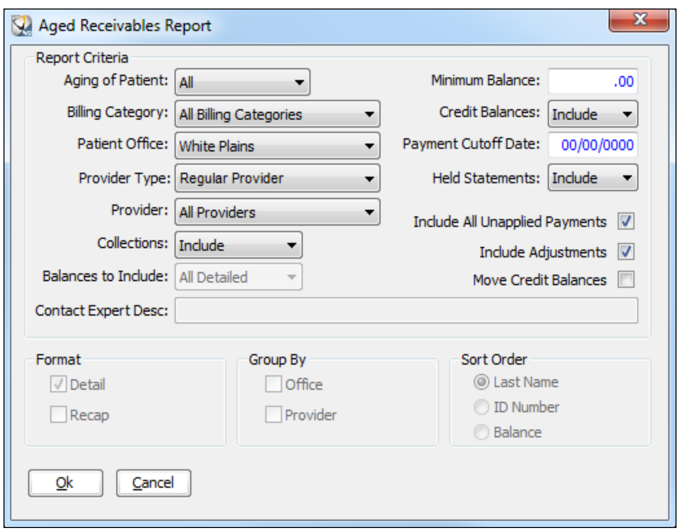
2 Select the **Experts** tab. The **Experts** window is displayed.

3 In the **Office Expert Category** field, select **Aged Receivables**.

The **Aged Receivables** window is displayed.



4 Click **New**. The **Aged Receivables Report** window is displayed.



5 In the **Report Criteria** section:

- **Aging of Patient**–Select the number of days to use for outdated balances.
- **Billing Category**–Select a billing category.
- **Patient Office**–Select the patient’s default office.
- **Provider Type**–Select **Regular Provider** or **Service Provider**.
- **Provider**–Select the patient’s default provider.
- **Collections**–Select an option for handling collection information on the report: **Include**, **Exclude**, or **Only**.

- **Minimum Balance**–Type the minimum amount necessary to be included in the report.
- **Credit Balances**–Select an option for handling credit balances: **Include**, **Exclude**, or **Only**.
- **Payment Cutoff Date**–Type the payment date after which payments are not included in the report.
- **Held Statements**–Select one of these options: **Include**, **Exclude**, or **Only**.
- **Include All Unapplied Payments**–If selected, unapplied payments are included in the report.
- **Include Adjustments**–If selected, the report includes adjustments when determining the **Last Pay Dt/Source/Amt** on the report.

6 Click **Ok.**

Defining Appointment Confirmation Items

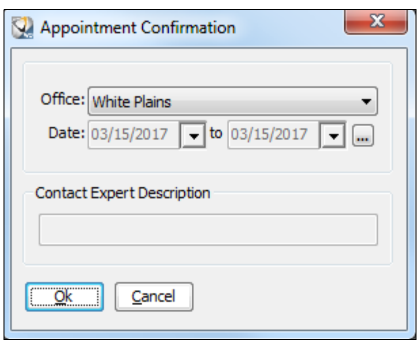
To define an appointment confirmation item:

1 Select **Tables > Practice > Practice Preferences.** The **Practice Data Entry** window is displayed**.**

2 Select the **Experts** tab. The **Experts** window is displayed.

3 In the **Office Expert Category** field, select **Appointment Confirmation**.

4 Click **New**. The **Appointment Confirmation** window is displayed.



5 In the **Office** field, select an office from the drop-down list.

6 In the **Date** field, click the ellipsis button. The **Date Selection** window is displayed. Select a range of dates to use and click **Ok.**

7 Click **Ok.**

Defining Appointment Status Items

Appointment Status items enable you to track information about appointments that have been deleted or marked as cancellations or no shows.

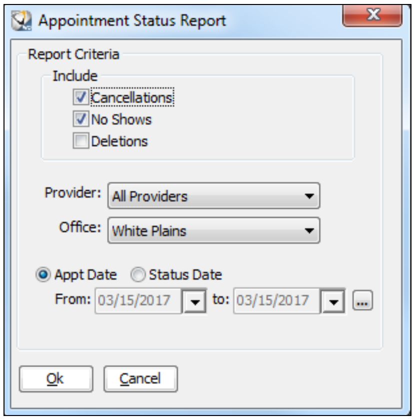
To define an appointment status item:

1 Select **Tables > Practice > Practice Preferences.** The **Practice Data Entry** window is displayed**.**

2 Select the **Experts** tab. The **Experts** window is displayed.

3 In the **Office Expert Category** field, select **Appointment Status**.

4 Click **New**. The **Appointment Status Report** window is displayed.



5 In the **Include** section, select one or more of these options: **Cancellations**, **No Shows**, **Deletions**.

6 In the **Provider** field, select an office location.

7 Select the **Appt Date** or **Status Date** option.

8 In the **Date** field, click the ellipsis button. The **Date Selection** window is displayed. Select a range of dates and click **Ok**.

9 Click **Ok**.

Defining Claim Resubmission Items

Claims Resubmission items enable you to track outstanding claims that need to be resubmitted.

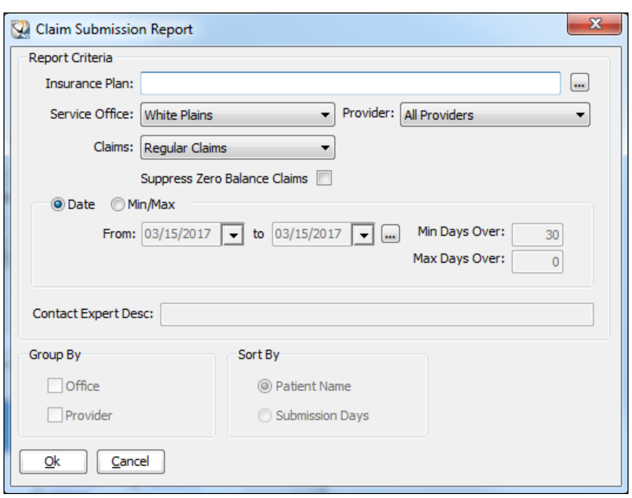
To define a Claims Resubmission item:

1 Select **Tables > Practice > Practice Preferences**. The **Practice Data Entry** window is displayed.

2 Select the **Experts** tab. The **Experts** window is displayed.

3 In the **Office Expert Category** field, select **Claim Submission (Resubmit)**.

4 Click **New**. The **Claim Submission Report** window is displayed.



5 In the **Report Criteria** section, set these options:

- **Insurance Plan**–Click the ellipsis to the right of the **Insurance Plan** field, and the **Insurance Plan Search** window is displayed. Select the plan you want, and click **Ok**.
- **Service Office**–Select one particular office or all offices from the drop-down list.
- **Claims**–Select the type of claim from the drop-down list.
- **Provider**–Select one specific provider or **All Providers** from the drop-down list.
- **Suppress Zero Balance Claims**–Excludes claims that have a zero balance.

6 Select one of these options:

- **Date**–Sets a specific date for the search. Click the ellipsis button to the right of the date fields, and the **Date Selection** window is displayed.
- **Min/Max**–Sets the option to list all claims a certain number of days old. Enter the minimum and maximum number of days for which you want to generate the report.

7 Click **Ok**.

Defining Contact Note Items

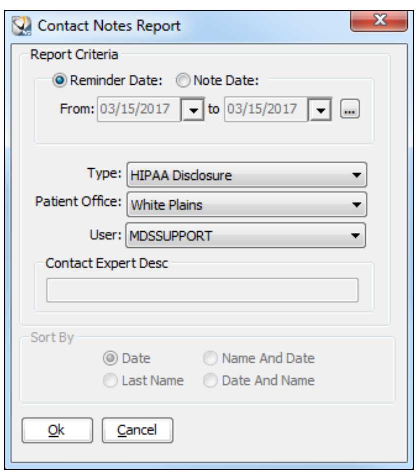
Contact notes enable you to create a follow-up list of collection calls, insurance delays, or other activities. To define a contact note item:

1 Select **Tables > Practice > Practice Preferences**. The **Practice Data Entry** window is displayed.

2 Select the **Experts** tab. The **Experts** window is displayed.

3 In the **Office Expert Category** field, select **Contact Note**.

4 Click **New**. The **Contact Notes Report** window is displayed.



5 In the **Report Criteria** section, set these options:

- **Reminder Date**–A list of notes that have reminder dates within a specified date range.
- **Note Date**–A list of notes within a specified date range.

6 In the **From** and **to** fields, enter dates or click the ellipsis button, and the **Date Selection** window is displayed. Select the beginning and ending dates and click **Ok.**

7 In the **Type** field, select a category from the drop-down list.

8 In the **Patient Office** field, select the office location.

9 In the **User** field, select the person whose notes you want to generate.

10 Click **Ok.**

Defining Credit Balance Items

Credit balance items enable you to access information about accounts with credit balances.

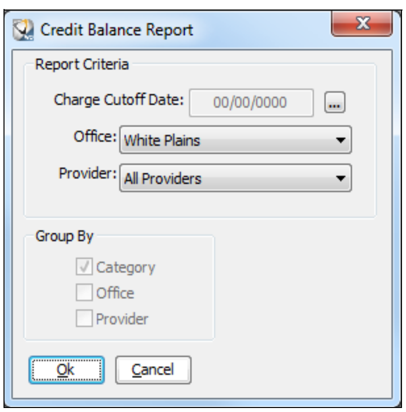
To define a credit balance item:

1 Select **Tables > Practice > Practice Preferences.** The **Practice Data Entry** window is displayed**.**

2 Select the **Experts** tab. The **Experts** window is displayed.

3 In the **Office Expert Category** field, select **Credit Balance.**

4 Click **New.** The **Credit Balance Report** window is displayed.



5 Set these options in the **Report Criteria** section:

- **Charge Cutoff Date**–Excludes credit balances due to charges posted after a specified date.
- **Office**–Name of an office location.
- **Provider**–Name of a provider.

6 Click **Ok.**

Defining Deleted Transaction Items

The Deleted Transaction items enables you to keep track of transactions that were deleted:

- During a specified period
- By one user or all users
- By the posting office

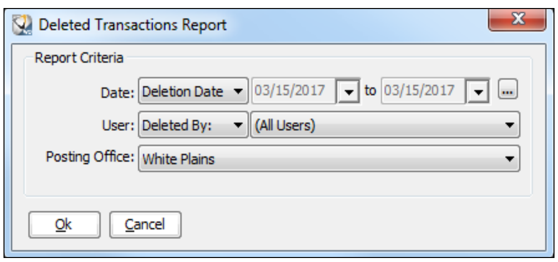
To define a deleted transaction item:

1 Select **Tables > Practice > Practice Preferences**. The **Practice Data Entry** window is displayed**.**

2 Select the **Experts** tab. The **Experts** window is displayed.

3 In the **Office Expert Category** field, select **Deleted Transactions**.

4 Click **New**. The **Deleted Transactions Report** window is displayed.



5 In the **Date** field, select **Deletion Date** or **Posting Date**.

6 Click the ellipsis button, and the **Data Selection** window is displayed. Set the **From** and **to** dates, and click **Ok**.

7 In the **User** field, select **Deleted By** or **Posted By**. Select **All Users** or the name of one user from the drop-down list.

8 In the **Posting Office** field, select the posting office.

9 Click **Ok.**

Defining Insurance Claim Queue Items

When you define an insurance claim queue item, you summarize information about insurance claims in the queue. To define an insurance queue item:

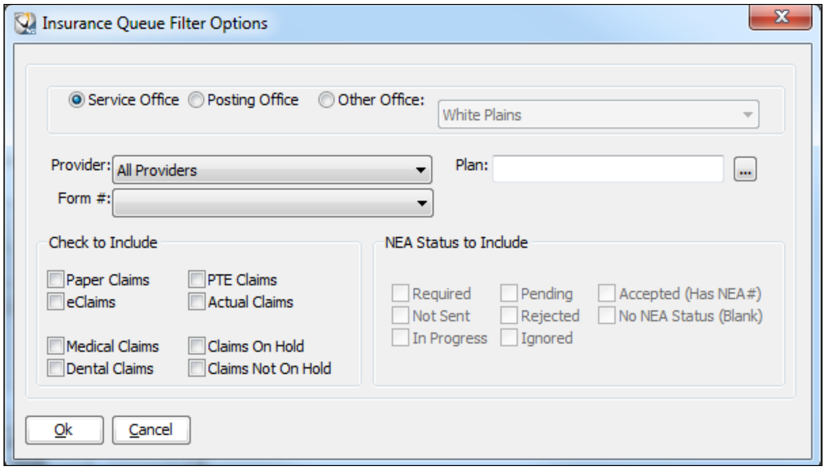
1 Select **Tables > Practice > Practice Preferences**. The **Practice Data Entry** window is displayed**.**

2 Select the **Experts** tab. The **Experts** window is displayed.

3 In the **Office Expert Category** field, select **Insurance Claim Queue**.

4 Click **New**.

The **Insurance Queue Filter Options** window is displayed.



5 Select the filter options.

6 Click **Ok.**

Defining Recall Items

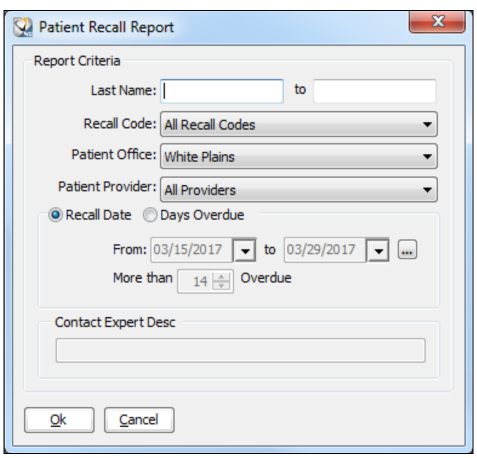
Recall items enable you to generate a list of patients that you need to recall. To define a recall item:

1 Select **Tables > Practice > Practice Preferences.** The **Practice Data Entry** window is displayed**.**

2 Select the **Experts** tab. The **Experts** window is displayed.

3 In the **Office Expert Category** field, select **Recall.**

4 Click **New.** The **Patient Recall Report** window is displayed.



5 In the **Report Criteria** section, set these options:

- **Last Name** and **to**–Enter the range of names to use when filtering patients.
- **Recall Code**–Select the recall code from the drop-down list.
- **Patient Office**–Select the office from the drop-down list.
- **Patient Provider**–Select the name of the provider or all providers from the drop-down list.

6 Select one of these date options:

- **Recall Date**–If selected, enter dates for the recall in the **From** and **To** fields.
- **Days Overdue**–If selected, select the number of days in the **More than . . . Overdue** field.

7 Click **Ok.**

Defining Statement Items

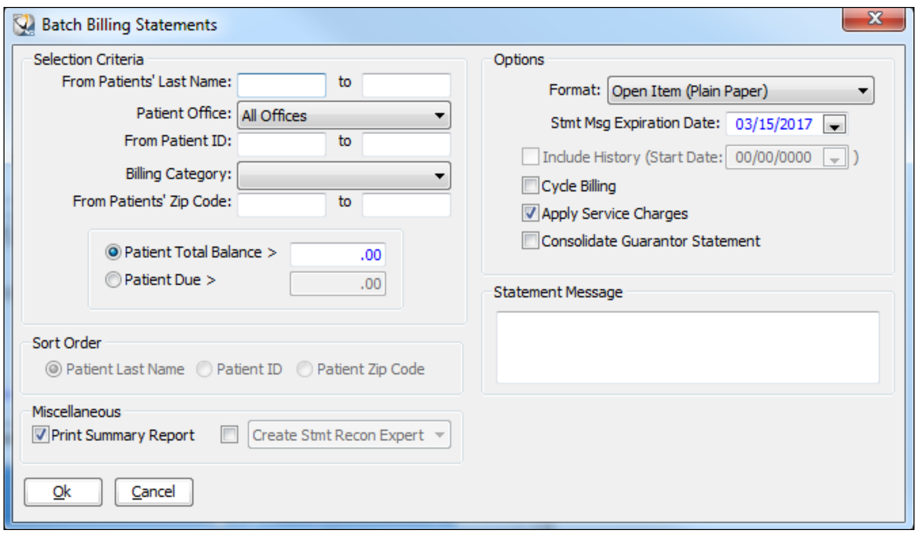
To define a statement item:

1 Select **Tables > Practice > Practice Preferences**. The **Practice Data Entry** window is displayed**.**

2 Select the **Experts** tab. The **Experts** window is displayed.

3 In the **Office Expert Category** field, select **Statements.**

4 Click **New**. The **Batch Billing Statements** is displayed.

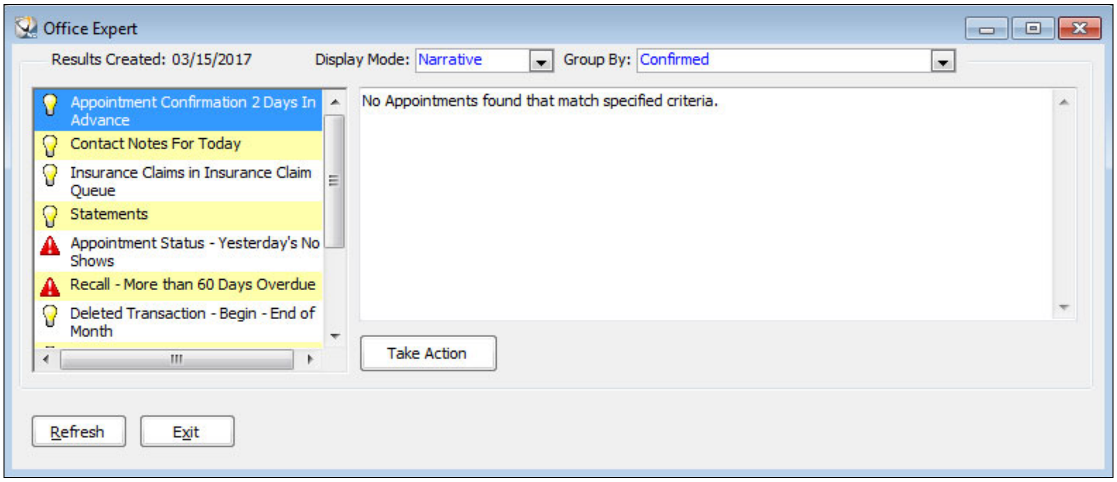


5 In the **Selection Criteria** section, select the criteria.

6 Click **Ok.**

Displaying the Office Expert

To display the Office Expert, select **Experts > Office Experts**. The **Office Expert** window is displayed.



A list is displayed in the **Results Created** column.

In each list, you can change the format of the results and the organization of the results. To change the display, set these options at the top of the **Office Expert** window:

- **Display Mode–Grid** displays the results in a table; **Narrative** displays the results as text.
- **Group By**–These options vary according to the Office Expert that has been selected.

Each Office Expert has a priority designated by an icon:

Note

Important

Urgent

Working with the Results of Office Expert

To perform an action on an Office Expert item:

1 In the **Office Expert** window, select an Office Expert from the **Results Created** column. On the right side of the window, a list is displayed.

2 Click **Take Action**.

3 Select an action from the menu.

Updating the Results of Office Expert

Changes that you make to the Office Expert do not take effect until you refresh it. To refresh Office Expert:

1. Close the **Office Expert** window in which you have made changes.
2. In the **Practice Data Entry** window, click **Ok**. The **Practice Settings** window is displayed.
3. Click **Yes**. A message is displayed.
4. Click **Ok**

Closing Office Expert

To close the Office Expert, click **Exit**.

Skill Sharpeners

Exercise 1—Create a Contact Expert for a Recall List

To create a contact expert to generate a recall list:

1 Select **Experts > Contact Experts.** The **Contact Expert** window is displayed.

2 Click **New.** A list of categories is displayed.

3 Select **Recall.** The **Patient Recall Contact Expert** window is displayed.

4 Select the criteria to generate the list.

5 Click **Ok.**

6 To rename the contact expert, type the name in the **Description** field.

7 Click **Ok.**

Exercise 2—Process a Recall List

To process the recall list using the expert you just created:

1 Select **Experts > Contact Experts.** The **Contact Expert** window is displayed.

2 Select the list you just created.

3 Click **Process.**

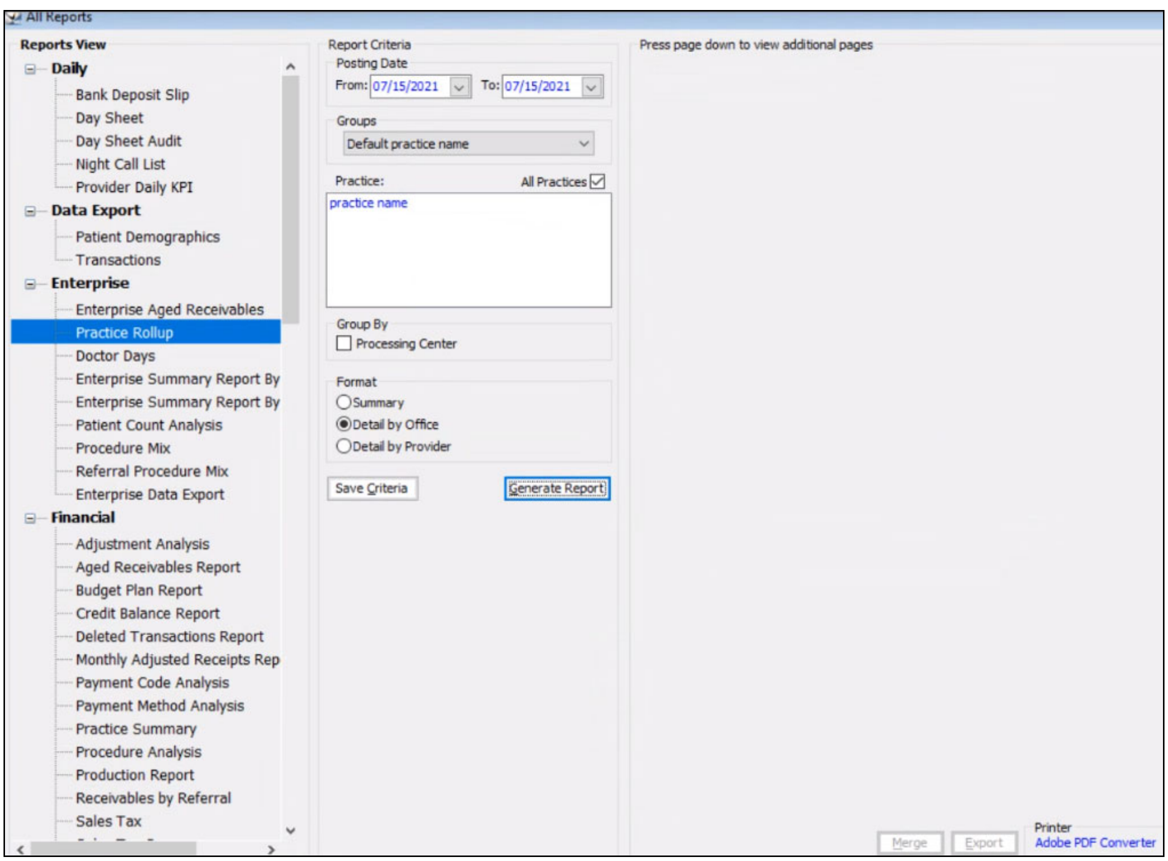
12 Creating Reports

This lesson includes the following topics:

- Accessing Reports
- Daily Reports
- Data Export Reports
- Enterprise Reports
- eReminders Reports
- Financial Reports
- Insurance Reports
- Patient Reports
- QuickBooks Reports
- Referral Reports
- Scheduler Reports
- Exporting Reports to Microsoft Excel Software

Accessing Reports

To display the **All Reports** window, click **Reports** on the menu bar. Use the scroll bar to see all reports.



Daily Reports

The **Daily** reports include:

- **Bank Deposit Slip**–Prints deposit slips. Use this function only if you have verified that your bank accepts computer-generated deposit slips and you have set up your office with the appropriate bank identification information.

- **Day Sheet**–Summarizes all the transactions on a single day.

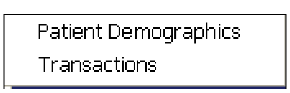
- **Day Sheet Audit**–Lists the audit logging information for a date range and a user. You must have the appropriate security level to generate this report.

- **Night Call List**–Lists information about calls to be made after regular office hours. It is used primarily as a reminder to contact patients who had treatment that day and require a follow-up. A Night Call report contains:
  - Name
  - Phone number
  - Nickname
  - Age
  - Procedures performed
  - Diagnoses

- **Provider Daily KPI**–Calculates collections, production, and doctor days for the month, and a provider's total visits for the month for all offices.

Data Export Reports

The **Data Export** reports include:



To enable the data export reports:

1 On the **System Defaults** tab, in the **Enable Data Export** section, select the **Enable Data Export** option.

2 In the **Output Directory** field, verify or change the location in which to store the export files. The default location is **C:\winomscs\documents\export**.

3 Click **Ok.**

Enterprise Reports

When your Enterprise license is activated, these reports are available on the **Reports** menu for corporate users:

Enterprise Aged Receivables
Practice Rollup
Doctor Days
Enterprise Summary Report By
Enterprise Summary Report By
Patient Count Analysis
Procedure Mix
Referral Procedure Mix
Enterprise Data Export

- **Enterprise Aged Receivables**–Generates an Enterprise-level outstanding Aged Receivables report, by groups of practices, for each practice in the group.
- **Practice Rollup**–Generates a list of financial transactions, by practice, for a specified date range.
- **Doctor Days**–Calculates productivity for each doctor in a specified location, as well as the production amounts associated with the day. The report can be generated for the current day or for future appointment details.
- **Enterprise Summary Report by Provider**–Generates an Enterprise-level summary of the financial data for each provider on a yearly basis. The report can be generated for each practice or for specific providers.
- **Enterprise Summary Report by Office**–Generates an Enterprise-level summary of the financial data for each office on a yearly basis. The report can be generated for each practice or for specific offices.
- **Patient Count Analysis**–Lists year-to-date totals for patient visits and new patients. The report also displays total patients seen within the current month, and provides comparisons for the previous year.
- **Procedure Mix**–Lists the types of procedures performed for a range of patients and how the patients pay for their services. The count refers to the revenue generated, both gross revenue charged to patients for their services, as well as the net revenue of payments after adjustments, discounts, and so forth.
- **Referral Procedure Mix**–Enables you to ascertain how each referral contributes to your patient count, what kinds of procedures are performed for those patients, and how the patients pay for their services. The count refers to the revenue generated, both gross revenue charged to patients for their services, as well as the net revenue of payments after adjustments, discounts, and so forth.
- **Enterprise Data Export**–Enables you to export all transactions for a date range and related charges, payments, adjustments, distributions, and referral sources.

For more information about the Enterprise software, see the online help.

eReminders Reports

The **eReminders** reports include:

Delivery
Unconfirmed
Other

- **Delivery**–Generates a list of eReminders sent on the previous day, and their dispositions.
- **Unconfirmed**–Generates a list of eReminders that remain unconfirmed.
- **Other**–Displays a blank **eReminders Report Criteria** window.

Financial Reports

The **Financial** reports include:

Adjustment Analysis
Aged Receivables Report
Budget Plan Report
Credit Balance Report
Deleted Transactions Report
Monthly Adjusted Receipts Report
Payment Code Analysis
Payment Method Analysis
Practice Summary
Procedure Analysis
Production Report
Receivables by Referral
Sales Tax
Sales Tax Summary
Service Charges
Service Office Detail
Service Office Summary
Statement Reconciliation
Transaction Detail
Transaction Summary
Unapplied Payment/Adjustment Report
Unscheduled Treatment Plans

- **Adjustment Analysis**–Lists the adjustments made, the number of times an adjustment was made, and the total amount of adjustments.
- **Aged Receivables Report**–Lists all patients with balances that meet selected criteria.
- **Budget Plan Report**–Compares budget to progress. This report can be run only if a budget plan has been set up.
- **Credit Balance Report**–Lists all accounts with credit balances.
- **Deleted Transactions Report**–Lists transactions that have been deleted during a specified period by a specified user.
- **Monthly Adjusted Receipts Report**–Summarizes total receipts minus adjustments for each provider.

- **Payment Code Analysis**–Lists records of payments for each payment code.
- **Payment Method Analysis**–Lists payment methods–cash, credit card, check, electronic deposit, or money order–grouped by office, provider, or payment source.
- **Practice Summary**–Summarizes production for one month, patient count, transaction totals, and receivables in a one-page summary.
- **Procedure Analysis**–Lists the number of procedures and the production totals for a month.
- **Production Report**–Summarizes your practice's production based upon the procedures performed. To exclude a procedure from the summary, select **Mask**.
- **Receivables by Referral**–For a one-month period, lists the receivables resulting from a single referral source.
- **Sales Tax**–Calculates the tax on all procedures marked for tax calculation for a specified period.
- **Sales Tax Summary**–Provides a total of the sales tax charged patients.
- **Service Charges**–Lists all service charges imposed for a period of time.
- **Service Office Detail**–For a service office and provider, lists the following data for a specified date range: number of new patients, number of visits, total charges, and all payments and adjustments. This report reconciles unapplied payments with the Transaction Summary report.
- **Service Office Summary**–Summarizes the production for each office location and month-to-date and year-to-date information. This report reconciles unapplied payments with the Transaction Summary report.
- **Statement Reconciliation**–Enables you to identify statements that fall outside the billing cycle's criteria.
- **Transaction Detail**–Lists transactions for a specified date range.
- **Transaction Summary**–Summarizes the following data by month for a specified year: patient counts, charges, payments, and adjustments.
- **Unapplied Payment/Adjustment Report**–Lists all payments and adjustments that have been entered, but have not been applied to specific charges. Indicates the posting office.
- **Unscheduled Treatment Plans**–Displays treatment plans that are proposed but not completed, as well as patient contact information, line items for each treatment plan, and the financial totals for the suggested services.

Insurance Reports

The **Insurance** reports include:

Capitation Report
Claim Submission
Insurance Aged Receivables
Insurance Carrier/Plan Financial Analysis
Managed Care
Open Treatment Plan
Unbilled Insurance

eVerifications

- **Capitation Report**–Measures your production under capitation plans and determines the profitability of the capitation plans in which you participate.
- **Claim Submission**–Tracks outstanding insurance claims and lists insurance claims that have been printed that day.
- **Insurance Aged Receivables**–Tracks balances designated as the responsibility of the patient's insurance. If a charge is covered by multiple policies, this report considers the balance to be the responsibility of the policy most recently billed.
- **Insurance Carrier/Plan Financial Analysis**–Lists the number of patients, receipts, and adjustments for each insurance plan for the current year and the previous year.
- **Managed Care**–Lists authorized treatments for a date range and provider, grouped by office, provider, or plan.
- **Open Treatment Plan**–Tracks procedures that are entered as pre-treatment estimates and that have not yet been converted to actual charges or deleted.
- **Unbilled Insurance**–Lists charges that have not yet been billed, because you are waiting for more information or lab results.
- **eVerifications**–Used in conjunction with electronic services.

Patient Reports

The **Patients** reports include:

Alerts
Implant Tracking
Contact Notes
Recall
Stage Tracking
Patient Demographic
Patient Details
Patient Referral
Patient Statistics By Zip Code
Prescription
Treatment Plan

- **Alerts**–Lists alerts for a date range and one or more patients. You can specify any combination of three alert types: financial, medical, and personal.
- **Implant Tracking**–Lists implants used and planned to be used, depending on the criteria selected. This report is useful for inventory control and planning purposes.
- **Contact Notes**–Lists any reminders set up for scheduling follow-up appointments, making collection calls, or any other activity for which action is required.
- **Recall**–Lists patients with due or overdue recalls, depending on the criteria selected.
- **Stage Tracking**–Lists patients based on the stage of their treatment plan. The report can be for one stage or all stages. It enables you to track patients through completion of surgery. It also tracks patients who have had consultations, but not scheduled surgery.
- **Patient Demographic**–Lists patients who fall into categories based on criteria you select.
- **Patient Details**–Lists patients based on such criteria as age of balance and minimum balance.
- **Patient Referral**–Lists all patients who have referred other patients and whom they referred.
- **Patient Statistics by Zip Code**–Lists patients by zip code. This enables you to analyze the geographic source of patients and revenue.
- **Prescription**–Lists all prescriptions generated in a specified time frame for a specific type of medication. This report is used in conjunction with the **Night Call** report.
- **Treatment Plan**–Lists patients who have treatment plans that meet certain criteria. For example, you can identify patients who have treatment plans that were presented but not yet accepted, or accepted but not yet scheduled.

QuickBooks Reports

The WinOMS software can be integrated with QuickBooks. The **QuickBooks** reports include:

Historical Deposits
Historical Refunds

- **Historical Deposits**–Helps reconcile your QuickBooks system to the WinOMS software.
- **Historical Refunds**–Helps reconcile your QuickBooks system to the WinOMS software. Reports can be run by posting office, refund code, user, and QuickBooks account and class.

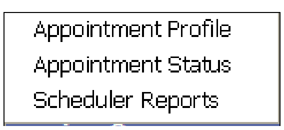
Referral Reports

The **Referral** reports include:

- **Dollar/Count**–Lists your referral sources, rankings and ratings, patient count, and financial statistics. You can use the report to compare these numbers to previous periods or the same period of the previous year.
- **Referral Action**–Lists referring doctors and staff based on referral date and last activity date.
- **Referral Demographic**–Lists referral sources based on such demographic criteria as birth month or personal and professional interests.
- **Procedure Trend Analysis**–Lists procedures for which there have been referrals. This report can be for one referral source or all sources. It displays year-to-date charges by procedure category.
- **Zip Code Analysis**–Lists the geographic origin of patients who have undergone specified procedures within a date range.
- **Rankings & Ratings**–Lists referral sources by criteria that you specify. The resulting report, for example, can provide rankings by number of patients or total charges.

Scheduler Reports

The **Scheduler** reports include:



- **Appointment Profile**–This report helps the practice prepare for appointments. Materials and equipment can be ordered ahead of time or staff schedules adjusted, if necessary. Appointment notes, allergies, and medical alerts can be included on the report.
- **Appointment Status**–Lists cancellations, no shows, and deletions for a date range.
- **Scheduler Reports**–Lists what is on the Scheduler for a date range. The report can have a single column, multi-column, or week-at-a glance.

Exporting Reports to Microsoft Excel Software

To export reports to Excel:

1. In the All **Reports** window, select the report you want to export. The **Report Criteria** fields are displayed.
2. Select the criteria.
3. Click **Generate Report**. The report is displayed.
4. Click **Export**. The **Save Report to a File** window is displayed.
5. In the **Save To File** field, rename the file based on your office's naming conventions. You must leave the **.xls** extension as part of the file name.

   Important: Give each exported report a unique file name so that all exported reports are saved and can be used for future reference.
6. Click **Save** and **Ok**.

To access the exported file, navigate to the folder to which you exported it.

Skill Sharpeners

Exercise 1—Run a Specific Report

Run the **Night Call List** report. To run the report:

1. Select **Reports** on the menu bar. The **Reports** menu is displayed.
2. Move your cursor over **Daily**, and a sub-menu is displayed.
3. Select **Night Call List**. The **Night Call Report** window is displayed.
4. Select the criteria you want and click **Print.**

Exercise 2—Display the Day Sheet

To display the Day Sheet:

1. Select **Reports > Daily > Day Sheet**. The **Day Sheet Report** window is displayed.
2. Change the criteria. The **Print Day Sheet Report** window is displayed.
3. Click **Print** to print the report. The **Day Sheet Detail** window is displayed.

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