

# **Initial Training Workbook**

# WinOMS Practice Management Software

Your Guide to a Successful Transition

> carestreamdental.com 800.944.6365

WinOMS Practice Management Software

# **Initial Training Workbook**

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# Contents

## About This Guide

Chapter 1	Logging In to the Software
Navigating in the	Using Practice Central
Software	Using the Toolbar
	File Menu
	Posting Menu
	Billing Menu
	Reports Menu
	Experts Menu
	Scheduler Menu
	Letters Menu
	Tables Menu         6
	Utilities Menu
	Windows Menu
	Help Menu
	Shortcut Menus
	Logging Out of the Software
Chapter 2	Setting Practice Central Preferences
Chapter 2 Setting Preferences	Setting Practice Central Preferences
Chapter 2 Setting Preferences	Setting Practice Central Preferences       .11         Setting Practice Preferences       .12         Setting Demographics       .12
Chapter 2 Setting Preferences	Setting Practice Central Preferences       .11         Setting Practice Preferences       .12         Setting Demographics       .12         Setting Financial Preferences       .13
Chapter 2 Setting Preferences	Setting Practice Central Preferences       .11         Setting Practice Preferences       .12         Setting Demographics       .12         Setting Financial Preferences       .13         Setting Insurance Preferences       .14
Chapter 2 Setting Preferences	Setting Practice Central Preferences       .11         Setting Practice Preferences       .12         Setting Demographics       .12         Setting Financial Preferences       .13         Setting Insurance Preferences       .14         Setting Statement Preferences       .16
Chapter 2 Setting Preferences	Setting Practice Central Preferences       .11         Setting Practice Preferences       .12         Setting Demographics       .12         Setting Financial Preferences       .13         Setting Insurance Preferences       .14         Setting Statement Preferences       .16         Setting Defaults       .17
Chapter 2 Setting Preferences	Setting Practice Central Preferences       .11         Setting Practice Preferences       .12         Setting Demographics       .12         Setting Financial Preferences       .13         Setting Insurance Preferences       .14         Setting Statement Preferences       .16         Setting Defaults       .17         Setting Miscellaneous Preferences       .18
Chapter 2 Setting Preferences	Setting Practice Central Preferences       .11         Setting Practice Preferences       .12         Setting Demographics       .12         Setting Financial Preferences       .13         Setting Insurance Preferences       .14         Setting Statement Preferences       .16         Setting Defaults       .17         Setting Miscellaneous Preferences       .18         Setting Letter and Label Preferences       .19
Chapter 2 Setting Preferences	Setting Practice Central Preferences       11         Setting Practice Preferences       12         Setting Demographics       12         Setting Financial Preferences       13         Setting Insurance Preferences       14         Setting Statement Preferences       16         Setting Defaults       17         Setting Miscellaneous Preferences       18         Setting Letter and Label Preferences       19         Setting Up Customized Labels       19
Chapter 2 Setting Preferences	Setting Practice Central Preferences       .11         Setting Practice Preferences.       .12         Setting Demographics.       .12         Setting Financial Preferences       .13         Setting Insurance Preferences       .14         Setting Statement Preferences       .16         Setting Defaults       .17         Setting Miscellaneous Preferences       .18         Setting Letter and Label Preferences       .19         Adding Referral Label Settings       .19
Chapter 2 Setting Preferences	Setting Practice Central Preferences       11         Setting Practice Preferences       12         Setting Demographics       12         Setting Financial Preferences       13         Setting Insurance Preferences       14         Setting Defaults       17         Setting Miscellaneous Preferences       18         Setting Up Customized Labels       19         Adding Referral Label Settings       19         Setting Office Preferences       20
Chapter 2 Setting Preferences	Setting Practice Central Preferences11Setting Practice Preferences.12Setting Demographics.12Setting Financial Preferences13Setting Insurance Preferences14Setting Statement Preferences16Setting Defaults17Setting Miscellaneous Preferences18Setting Letter and Label Preferences19Setting Up Customized Labels19Setting Office Preferences20Setting Up Staff.21
Chapter 2 Setting Preferences	Setting Practice Central Preferences.11Setting Practice Preferences12Setting Demographics12Setting Financial Preferences.13Setting Insurance Preferences.14Setting Statement Preferences.16Setting Defaults.17Setting Miscellaneous Preferences.18Setting Letter and Label Preferences.19Adding Referral Label Settings.19Setting Office Preferences.20Setting Up Staff21Adding Staff Information.21
Chapter 2 Setting Preferences	Setting Practice Central Preferences.11Setting Practice Preferences12Setting Demographics12Setting Financial Preferences.13Setting Insurance Preferences.14Setting Statement Preferences.16Setting Defaults.17Setting Miscellaneous Preferences.18Setting Up Customized Labels.19Adding Referral Label Settings.19Setting Office Preferences.20Setting Up Staff21Adding Staff Information.21Editing Staff Information.22

Chapter 3	Accessing the Patient Window
Using the Patient	Using the Patient Window
Window	Schedule Snapshot
	HIPAA
	Alerts
	EMR
	Chart Status
	Accessing EMR Data and Functions
	Buttons and Functions
	Docking Patient Records
	Routing Docked Patients to Others
	Adding New Patients
	Adding Detailed Patient Information
	Finding Current Patients
Chapter 4	Navigating the Scheduler 37
Using the	Changing Scheduler Views 38
Scheduler	Setting Up the Appointment Scheduler
	Adding Provider Schedules 39
	Adding Appointment Categories.
	Adding Appointment Types
	Scheduling Appointments
	Finding Available Time Slots
	Scheduling an Existing Patient
	Scheduling a New Patient
	Scheduling Lockout Appointments
	Confirming Appointments
	Rescheduling an Appointment
	Using Recalls
	Changing Recalls
	Deleting Recalls
	Printing Recall Reports
Chapter 5	Working with Insurance Carriers
Working with	Adding Carriers
Insurance	Editing Insurance Carriers
	Deleting Insurance Carriers
	Working with Insurance Plans
	Adding Insurance Plans
	Editing Insurance Plans
	Deleting Insurance Plans

	Adding Fee and Benefit Information
	Adding Forms, IDs, and Notes
	Working with Fee and Allowable Schedules
	Setting Up Fee Schedules
	Setting Up Allowable Schedules
	Replacing or Copying Fee and Allowable Schedules
	Deleting Fee and Allowable Schedules
Chapter 6	Setting Up Referral Information
Working with	Using the Basic Tab
Referrals	Using the Extended Tab
	Using the Interests/Family Tab
	Using the Public Relations Tab
	Editing Referral Information
	Deleting Referrals
	Working with Referral Categories
	Setting Up Referral Categories
	Editing Referral Categories
	Deleting Referral Categories
	Working with Referral Interest Categories
	Adding Referral Interest Categories
	Editing Referral Interest Categories
	Deleting Referral Interest Categories
	Tracking Referrals
	Accessing Referrals
	Tracking Patients You Refer
	Printing Referral Reports
Chapter 7	Entoring Proscriptions 75
Working with	Po-Proportibing 76
Prescriptions	Voiding Prescriptions 76
	Dripting Prescriptions
	Printing Prescription Reports
Chapter 8	Adding Alerts
Using Alerts	Changing Alerts
	Deleting Alerts
	Printing Alerts
Chapter 9	Creating Encounter Slips
Using Encounter Slips	

v

Chapter 10	Setting Up Consent Forms
Using EMR	Creating Consent Form Templates
Consent Forms	Designing Print Layouts for Forms
	Linking Consent Forms
	Adding Consent Forms
	Filling Out and Signing Forms
Chapter 11	Using the Contact Expert
Using Experts	Setting Contact Experts Preferences
	Displaying the Contact Expert
	Creating Lists with the Contact Expert
	Editing Contact Expert Lists
	Deleting Contact Expert Lists
	Processing Contact Experts
	Using the Office Expert
	Setting the Office Expert Preferences
	Defining Aged Receivables Expert Items
	Defining Appointment Confirmation Items
	Defining Appointment Status Items
	Defining Claim Resubmission Items
	Defining Contact Note Items
	Defining Credit Balance Items
	Defining Deleted Transaction Items
	Defining Recall Items
	Defining Statement Items
	Displaying the Office Expert
	Working with the Results of Office Expert
	Updating the Results of Office Expert
	Closing Office Expert
Chapter 12	Accessing Reports 111
Creating Reports	Daily Reports 112
	Data Export Reports
	Enterprise Reports
	eReminders Reports
	Financial Reports
	Insurance Reports
	Patient Reports 116
	QuickBooks Reports
	Referral Reports
	Scheduler Reports 118
	Experting Reports to Microsoft Event Software 110

# **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.

# 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.

Velcome To CS Win0MS Practice Management Software. Please Log In						
Warning: This computer program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this production of distribution of this and result in severe evid and or timinal penalities and will be prosecuted to the maximum extent possible under the law.	User Information User ID: Password: Qk Exit Version: 8. 10.0.38					

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.

र्रि Select Service	/Posting Office	×
Service Office:	Test	
Posting Office:	Test	
Qk	Cancel	

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.

WinOMS Software: Oral	Surgery Associates Name 2 - MDSSUPP	ORT							ſ	Advantation and a second second
Posting Billing Report	rts Experts Scheduler Letters Tab	oles Utilities Win	dows Help						I	Unly give control to people you trust
Practice Central										
	And in case of the local division of the loc		Thursday - January 07,	og out 2021						
ource Center	Today's Appointments	Appointment Summary	Office Expert Created on 08/27/2013	Insura	nce Processing Que	aue Paper / Electronic	Optical	Ticket Queue		Patient Registration Queue
	10:15 AM Morris Dagostino	Surgery	Aged Receivables - 91+	17470	Cycle Billing	O Paper O Paper	2	Walter Buonaiuto	Printed	deLeon, Marsha
nOMS Home Page		1.15 / 1.15 / 1.15 / 1.15 / 1.15 / 1.15 / 1.15 / 1.15 / 1.15 / 1.15 / 1.15 / 1.15 / 1.15 / 1.15 / 1.15 / 1.15 /	In Advance	17484	Matt Ackerman	OElectronic	55	Palmer Gate	Printed	Lara, Maria
change	Tomorrow's Appointments	5 Appointment Summar shalled for this day.	W	17486	Test Cogan	OPaper	56	JamieLynne	Printed	Mercer, Kelsie
ream Dental té	there are no apponentents sone	increa for one day	Patient Aged Receivables opported on	17534	Fanders Vu	Paper f Electronic	57	Jonathan Hall	Printed	Rodriguez, Raymond
			01/28/2007	17556	Alan Landrum	OPaper	58	Judy Williams	Printed	TEST, PBHS
ferencea				17561	Tom Jones	Paper	59	Ginny Gilbert	Printed	Test, PBHS
			Today's Contact Notes	17575	Trudi Jason Jr.	Electronic	60	James Gate	Printed	Test, PBHS
			There are no contact notes due today	17576	Tom Jones	Paper	61	Matt Ackerman	Printed	TESTING, PBHS
				17582	Trudi Jason Jr.	Paper	22385	Flict Enhance	Printed	Villegas, Erika
Documents				17586	Leonard Ocean	Paper	22387	Scott Fader	Printed	wooley, Juna
y Reports Folder				17587	Leonard Ocean	Paper	22388	Ivanna Bigfish	Printed	
							22389	Ivanna Bigfish	Printed	
Activity							22390	Alex Weber	Printed	
							22391	Alex Weber	Printed	
							22392	Mario Hobbie	Printed	
							22393	Thomas Calarza	Drinted	
*							22395	Darrell Sabhach	Printed	
12							22396	Darrell Sabbach	Printed	
							22397	Wayne Heack	Printed	
2-92							22398	Wayne Haack	Printed	
							22399	Vincenzo Damm	Printed	
							22400	Jessica Quijano	Printed	
= 12 6A							22401	Jessica Quijano	Printed	
							22402	Robert Fagen	Printed	
14 C							22403	James Gate	Printed	
							22405	Laurie Kalmbach	Printed	
							22405	Leonard Ocean	Printed	
							22407	James Gate	Printed	
							22408	Kevin Dawkins	Printed	
							22409	Peter Tiernan	Printed	
							22410	Dominique Ecker	t Printed	
							22411	Deporan Pasoter	Printed	R
							22413	Danielle Gardine	Printed	
							22414	John Wahab	Printed	
							22415	Lisa Falborn	Printed	
							22416	Eric Llong	Printed	
							22417	Keith Alba	Printed	
							22418	Patricia Herming	Printed	
							22419	Patricia Herning	Printed	
							22420	Barbara Farman	Printed	
							22422	Rachel Ponder	Printed	
							22423	Michael Torres	Printed	
							22424	Ronald Reardon	Printed	
							22425	James Gate	Printed	
							22426	Brian Callahan	Printed	
							22427	Kara Quinn	Printed	
							22428	Cynthia Ganger	Printed	
							22429	Carol Danan	Printed	

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:

F	ile	Posting	Billing	Reports	Experts	Scheduler	Letters	Tables	Utilities	Windows	Help
1		4	<u>a</u>	)	8 🔄	42	🤗 🛯			1	

#### File Menu

File	Posting	Billing	Reports	Experts	S					
	Recall Las	Recall Last								
	Lexicomp	Lexicomp Homepage								
	Printer Setup									
	Print Screen									
	My Practice Central Preferences									
	Select Service/Posting Office									
	Select Practice									
	Select Scanner									
	Login/Log	gout								
	Exit									

## **Posting Menu**



# **Billing Menu**

Billir	ng	Reports	Experts	Scheduler L
	In	surance Pr	ocessing	•
	N	EA FastAtta	ich	•
	St	atements		
	eP	ayments		÷.
	В	udget Plan	Processin	g
	Re	fund Cheo	k Process	ing
	Q	uickBooks	Deposit E	ort

# **Reports Menu**

Rep	orts Experts	Scheduler	Le
	Daily		•
	Data Export		۱.
	Enterprise		۱.
	eReminders		۱.
	Financial		۱.
	Insurance		۱.
	Patient		۱.
	QuickBooks		۱.
	Referral		۱.
	Scheduler		۲.
	HouseCalls		
	Patient Verific	ation	
	PracticeToGo		

# **Experts Menu**

Experts	Scheduler	Letters
Co	ntact Expert	
Of	fice Expert	

# Scheduler Menu

Sch	eduler Letters Tables	Utiliti
	Open Scheduler	
	Setup Scheduler	+
	Purge Appts	
	Scheduler Reports	
	Batch Optical Tickets	

## **Letters Menu**

Lette	ers Tables Utilities Windows Help	
	Mail Merge	
	Mail Merge Document Maintenance	
	Template Maintenance	Þ
	Narrative Merge	
	Narrative Maintenance	
	Digital Forms	
	Digital Forms Maintenance	ŀ
	Microsoft Word	
	QuickEdit	

#### **Tables Menu**

Tabl	es Utilities Windows Help							
	Appointments	•						
	Diagnosis	•						
	Drugs & Prescriptions							
	EMR Components	•						
	eServices +							
	Insurance	•						
	Patients	•						
	Practice	•						
	Procedure	•						
	Referrals	•						
	Encounter Shortcuts							
	Miscellaneous Notes							
	Payment /Adjustment Codes							
	Tickets							
	Users							
	Walk-in							
	Zip Codes							

## **Utilities Menu**

Utilities Windows Help	
Change My Password	
Change Point-of-Care PIN	
Office Activation/Assignment	
Provider Activation/Assignment	
Time Clock	
Configure/Distribute Update Files	
My Computer Settings	
Security	
Unlock Locked User	
View Audit Log	
Forms Designer	
Insurance Form Alignment	
Update Insurance Plans To New Form	
Optical Ticket Helper	
Train Optical Tickets	
CDT Update	•
Trophy Image Conversion	
Refresh Messages	

#### Windows Menu

Win	dows Help
	Vertical
	Horizontal
	Layer
	Cascade
	Minimize All
	Restore All

#### Help Menu

Help	
About	
Addtional Help & Training	
CS WinOMS Help	F1

#### **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.

emographic	Financia	Insurance	Statements	Defaults	Miscell	aneous	Letters & Labels	Experts	Audit Log & Security	
Practice In	formation	í								
Pra	ctice ID:	1	Nickname	OMS Pho	enix 3.0	L	Act	ive		
1	Name 1:	OMS Phoenix 3	.0 Testing							
1	Name 2:	QA-1 RIG								
Ad	dress 1:	1234 Anywher	e Lane							
Ad	dress 2:	Suite 1341								
	City:	; San Francisco Stat				tate: CA Zip: 94108-				
Pi	rovince:			Cou	intry:					
	Phone:	(242) 586-125	3							
	Fax:	(242) 586-125	3 Mode	em: ( )	-					
	Email:									
Corporate	Tax ID:	2425861253								
P	roc Ctr:	Proc Ctr 1		~						

- 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 Preferences**. The **Practice Data Entry** window is displayed.
- 2 Click the **Financial** tab. The **Financial** tab window is displayed.

Demographic	Financial	Insurance	Statements	Defaults	Miscellaneous	Letters & Labels	Experts	Audit Log & Security	
Service Char Calculate	ance e Balance ( ) d Balances .50 Paym .00 rge Message sessed a ser	>30 Days) lent Exception Monthly Perce Charg vice charge of	After: 6 Period: 0 entage: e Code: 5	0 Days v Days v 1.50 C	Transaction Entry Std Fee Schedule: Standard Prompt for Provider on Charge Entry Add Blank Ailment When None Specified Freeze Amounts and Deletions on Transactions Posted Before Today Posted on or Before Last Close Date No Restrictions Last Close Date: 11/20/2003				
ePayments Service Use ePayments Service to post credit card transactions Prompt to settle credit card transactions upon last exit Data Directory:									

- 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.

Demographic Financial Insurance Statements Defaults Miscellaneou	us Letters & Labels Experts Audit Log & Security
Insurance Billing Defaults TIN: © Practice C Office C Provider Name: © Practice C Provider Procedure Sort Order: C Amount © Posting Default Medical Form: 57 - Laser CMS 1500 08/05 (M)	Miscellaneous Options Default Billing Order: Medical First Default ICD Version: ICD-10 Print Duplicate Form Print Procedure Descriptions on HCFA
Insurance Addresses	Print Tooth Number on HCFA
Private Lockbox:       3        Federal Lockbox:       0          Paper Return (Billing):       Practice       Image: Claims Return (	Resubmission Options Days: 365
UB92 Tax ID: 0 NPI ID: practivPI	Method: Calculate with Estimating
Qk <u>C</u> ancel	

- 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.

Demographic F	inancial	Insurance	Statements	Defaults	Miscellaneous	Letters & Labels	Experts	Audit Log & Security	
Statement A	aina								
Days Ra	ange [	Dunning Mess	age						
	0 - 30	Thank you for	r your prompt	payment v	ve really appreci	ate it.			
31 3	31 - 60	ay us now,	please.						
61 6	51 - 90	Your paymen	t is overdue.	Please pay	/ promptly				
91 91	1 - 120	Vour nevmen	t ie eeriouely r	verdue P	lease contact ou	r office			
121	121 +	n our paymen	a is scribusly t	syciade. P	iouse contact ou	telee			
		balance over	que! Action by	collection	agency may be	такел			
Select Mess	sage By	Date of Last	Payment 🗸						
-Billing Statem	ients			_	_			Cycle Billing	
Return Addr	ess by:	Lockbox	•	1	Do Not Sh	ow Ins Portion on :	Stmt	💿 Initial Visit Date	
	l	Lockbox ID:	з .		Include Hi	story		🔘 Last Visit Date	
					Consolidat	e Guarantor Stmt			
Default Indiv	Default Individual Stmt: 5 Minimum Days: 70								
Default i	Default Batch Stmt; eStatement								
	Cancel								

- 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.

remographic	Financial	Insurance	Statements	Defaults	Miscellaneous	Letters & Labels	Experts	Audit Log & Security	
Patient En	Ledger Ord	ler: Ascer	ding		~	Sc	heduler	lav Totarvalt 10	
Default I Maximum	Default Vi Billing Catego Open Patier	ew: Itemiz ory: Stand nts: 9	ed lard		~			Open Scheduler to Current Time Allow Multiple Booking Display Columns with no hours Reset View on Date Change	
Checkout ( Enabl Defa Walkou V Wa	Options e Charge Wi ult Action: it Statement alkout Stater ] Include All ] Include Ins ] Automatic	ndow Exit Print ment Transactio surance Inf Processing	Options v ns formation	Insura Ir Miscel Miscel Pri	ance Processing Isurance Automatic Pro laneous rge Letter nt Appt Card for	Next Appt	Paym	ent Exit Options efault Action: Open Checkout 🗸	

- 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.

Demographic Financial Insurance Statements Defaults Miscellaneous	Letters & Labels Experts Audit Log & Security
Patient Label Settings	Appointment Card
Eject 📃 🗘 🗢 blank labels.	Merce to: O Description
Merge to: Ocument \ Preview	Printer
Custom Chart Labels	Template: appt card 2.DOC
Label Template:	
Referral Label Settings	
Eject 0 🗢 blank labels.	
Merge to:  Document \ Preview Printer	
Custom Template	Letters
Label Template:	Procedure Sort Order: Procedure/Tooth
Qk <u>C</u> ancel	

- 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.

ID Office Name	Search Fields ID:
----------------	---

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

ffice Data Schedul	ing								
Active									
Office ID: 2									
Office Name:									
Address 1:									
Address 2:				City:					
State:	Zip:	55 <b>2</b> 5	Province:		Country:				
Phone			Financial						
Phone: ( )			Bank Routing #:						
Fax: ( )			Bank Acct #:						
Modem: ( ) -			Tax Code:		Tax Rate: 0.000				
Prescription Setting	IS		Other						
Form: (Default)		~	Trophy Image Folder:						
Do not print NPI			Tax II	Tax ID:					
Do not print DEA	ί.		E-Payment Data Folde	r:					
Do not print offi	ce copy		UB92 Tax I	D:	NPI ID:				
Diagnosis Code									
Prior States with	Controlled	Substances	Ins. Print Type:			14			
Number of Days	Supply On	Prescription							
Header Informa	tion								
Quantity/Refill E	oxes								

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.

👽 Provider/Staff Search	×
Staff ID Staff Name	Search Fields ID: Last Name: Find Display All Detail
Ok Cancel	New Edit Delete Print

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

🔍 Provider,	/Staff Data E	ntry						
Biographical	Employment	Provider Info	Scheduling	EMR Setting	IS			
Personal I	nformation				<u> </u>			
	ID:	1	Ту	pe: Staff	💌 (no ma	re available provid	ler licenses)	
Ti	tle:		Address	; 1:			Active	
First Nar	ne:		Address	; 2:				
Midd	ile:		C	ity:		State:	Zip: -	
La	ist:		Provin	ce:		Country:		
Suf	fix:		Home Pho	ne: () -			_	
			Work Pho	ne: () -		Ext:		
Other Cor	ntact Informatio	on						
Other P	hone Desc:				Other Phone:	) -		
Other P	hone Desc:				Other Phone:	) -	_	
Maailana		_						
Miscellarie	ous mornauo	II III Distincted	00 (00 (000	D Mare	tel Chatran			
56	ext [		2: 00/00/000	u Mar	ital Status: j	<u> </u>		
E-1M	an: )							
<u>O</u> k	Cancel							
·								

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**.

Staff ID	Staff Name	Search Helds
AC	Conroy, Abla	ID:
ABC	Conroy, Alba B., DDS	
GFDA	Daf, Daf Dfa	Last Name: Active Staff Members Only
DEF	Fitzpatrick, Daniel E., M.D., D.M.D	
KLM	Montague, Kelly L	Employee Number:
		Find Dieplay All
		Detail
		Office:
		Dept:
		Home:
		H: ( ) - W: ( ) - x:

- 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.

Provider/Staff Search           Staff ID         Staff Name	Search Fields  ID:  Last Name:  Find Display All  Detail
Ok Cancel	New Edit Delete Print

- 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.

Patient Search	
Name Patient ID Office	Search Recently Accessed Search Fields Last, First: Birthdate: 00/00/0000 Patient ID: Chart ID: SSN: Find Advanced Include @ Patients All Detail
Ok Cancel	New Edit Delete Profile

- 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.

Name	Patient ID	Office	~	Search Recently Accessed
Brown, Barry				Search Fields
Brown, Bernadette	13733	1		Last, First: brown
Brown, Danielle	13739	1		Birthdata: 00/00/0000
Brown, David	13770	1		
Brown, Dawn	13742	2		Patient ID:
<ul> <li>Brown, Jacinta</li> </ul>	13772	1		Chart ID:
Brown, James	20035	1	E	SSN:
Brown, Joanne	13718	1		
Brown, Lee	13777	1		Find Advanced
Brown, Leigh	13763	2		Include
Brown, Michael	13751	1		Patients     O All
Brown, Michelle	13766	1		Detail
Brown, Michelle	20070	1		80 Brisbane Lane
Brown, Milena	19886	2		
Brown, Miriam	13747	1		Ronkonkoma, NY 11779- (631) 987-3488 06/25/1989
Brown, Paul	16310	1		Kahn, Jennine

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

Ug He Porting Billing Reports Eperts Scheduler Letter Tables Utilities Windows Help L A   □   □   □   □   □   □   □   □   □	_ d ×
7 20052: Patient d'Test 2 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	EMR Workspace
Addate Statement in Lett     Social Statement in Lett     Social Statement in Lett     Social Statement in Lett       Materia (HT)     Materia (HT)     Social Statement in Lett     Social Statement in Lett     Social Statement in Lett       Materia (HT)     Materia (HT)     Social Statement in Lett     Social Statement in Lett     Social Statement in Lett       Materia (HT)     Materia (HT)     Social Statement in Lett     Social Statement in Lett     Social Statement in Lett       Materia (HT)     Social Statement in Lett     Social Statement in Lett     Social Statement in Lett     Social Statement in Lett       Materia (HT)     Social Statement in Lett     Social Statement in Lett     Social Statement in Lett     Social Statement in Letteria (Letteria (LETT))       Materia (HT)     Social Statement in Letteria (LETT)     Social Statement in Letteria (LETT)     Social Statement in Letteria (LETT)       Materia (HT)     Social Statement in Letteria (LETT)     Social Statement in Letteria (LETT)     Social Statement in Letteria (LETT)       Materia (HT)     Note (HT)     Social Statement in Letteria (LETT)     Social Statement in Letteria (LETT)       Materia (HT)     Note (HT)     Note (HT)     Social Statement in Letteria (LETT)       Materia (HT)     Note (HT)     Note (HT)     Note (HT)       Materia (HT)     Note (HT)     Note (HT)     Note (HT)       Materia (HT)	

## **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:



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.

Schedule Snapshot HIPAA Alerts										
Show:										
Yesterday O Today O Tomorrow										
Select Provider:										
Dr. Daniel Fitzpatrick M.D., D.M.D										
Select Location:										
White Plains 🗾										
🔽 Consults 🛛 🖉 Emergencies										
🔽 Surgeries 🛛 🛛 Other										
🔽 Post-Ops 🛛 🔽 None										
Apply										
Appointments:										

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.

CS WinOMS Software: 0	Dral Surgery Associates N	ame 2 - MDSSUPPORT	- [16413: Truc	di Jason Jr., Jr (E	MR - EMI	R Summa	ry)]				0.0	lu olus control to nanola unu trust	I		-	0	×
File Posting Billing	Reports Experts Sc	heduler Letters Ta	bles Utilities	Windows	Help							ly give control to people you trust	]			-	. 6 ×
🐚 📣 🛄 🛷 🤘	🔉 🗠 🐴 🔛 🎙	<b>* 2 1</b>	k 🗐												Docke	Patients (	(1)
刘 16413: Trudi Jas	on Jr., Jr						5 6 🖪	2	Ø 💒			Sch	dule Snapshot H	IIPAA Alerts I	MR W	orkspace	×
1000	Appointment:	Insurance	Me	edical Histor	¥.		Medications	L		Allergies		Medical Alerts		Chart Status: None		\$	_
		Medical Ins:	^							Alan Testing		Button First		× EMR Consents			
	Reg Prv: Jacoby Henrietta DMC	MCR Medicare BC/BS BlueChoice	HMO							Allergic to Codeine test		Deshea Test		× EMR Notes			
Touch Income In the	Primary Referral:	Dental Ins:								Allergic to Novocaine		Alan Testing		× Anesthesia			
Trudi Jason Jr., Jr	Davis, lerrold	MAGNA Publishers'-	Newsp							Button First				× Encounter Slip			
Male, 75y 11m	Secondary Referral:	DELTA Delta Denta	1							Deshea Test				× Referral Letter			
EMR Summary	Allergic to Novocaine	-	00/00/0000	00/0 0000	M	28										1 :	× ^
Descedure Mr.	Allergic to Soy		00/00/0000	00/00/0000		28										1 3	x
Procedure Hx	Button First		00/00/0000	00/00/0000												1 2	×
Patient Reg	Deshea Test		00/00/0000	00/00/0000												/ 3	x
Encounter Slip	Medications															+ /	^
Rx	Patient Chart															6	~
Follow-ups	Date Pro	ovider Description															-
Implants	4 07/25/2013	Alan Testing															
EMR Consents	-de 07/25/2013	Deshea Test															
Anesthesia	ф 07/25/2013	Button First															
N	01/05/2021 H	HIJ 004a - Amoxi	illin 500mg														_
Notes	12/08/2020	HU 011A - Tyleno	1 #3	lacan k													_
Images	10/01/2013	Anesthesia Rec	ord for: Trudi	Jason Ir													
Attachments	09/30/2013 20	093 Radiological R	eview of CBCT	Volume Gene	ral Review	wName:	Trudi Jason Jr. Chart Number:	16413Date o	of Imaging: Sept	mber 30, 2013 Date of Birth: Janua	ary 23, 1945 Study:	17 cm vertical field of view cone	beam CT scan includin	the jaws, teeth, airway, si	nuses and 1	(emporoma)	andii
Treatment Plans	09/27/2013 C	DEF D9220 - Gen	Anes first 30m	nin							.,,			,,			
	09/25/2013 H	HIJ D9220 - Gen J	Anes first 30m	nin													_
	09/25/2013	HIJ D9220 - Gen J	Anes first 30m	nin													
	09/09/2013 H	HU															
	09/06/2013 H	HIJ 04272 - Apica	I flap procedu	e													_
	09/06/2013	HU 06100 - Remo	val of implant	1-1													_
	09/06/2013	HI 90782 (1#15)	- Inerapeutic	inject.													
	9/06/2013	HII 001a - Penicill	in VK 500mg														_
	08/20/2013	Crash -															-
	(08/19/2013 H	HU Stage 1 ( Diag	nosed )														-
	08/19/2013 H	HIJ Stage 2 ( Diag	nosed )														_
	(8) 08/19/2013	HU Stage 3 ( Diag	nosed )														_
	07/26/2013 H	HU Arch Bar Remo	oval Date: Ju	ly 26, 2013 Pa	tient: Tru	udi Jasor	DOB: January 23, 1945 PID:	16413 Offic	e: SyracuseFollo	v-up: The patient is weeks s/p place	ement of arch bars/M	IMF in conjuction with treatment	or a mandible fracture.	Patient Reports: The patie	int was rele	used from N	MMI
	06/15/2012	Letter Sent: Pa	tient Labels Fi	ull Sheet.DOC													_
	06/15/2012	Letter Sent: Pa	tient Single Li	abel.DOC													_
	02/22/2012	Anesthesia Par	ord for Trudi	lason													-
	07/06/2006	Anesthesia Rec	ord for: Trudi	Jason													
	09/28/2004	Extraction Ope	rative Note														~

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:





- X 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 it 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 I 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 log 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 **T** 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.

Docked Patients (2)

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.

Dock Patient For:	ADMIN	
Note:	Send patient record before undocking.	*
		-
	Created	
	On: 03/14/2017 By: MDSSUPPORT	

- 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.

Name	Patient ID Office	Search Recently Accessed
		Search Fields
		Last, First:
		Birthdate: 00/00/0000
		Patient ID:
		Chart ID:
		SSN:
		Find Advanced
		Include O Patients O All
		Detail

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

Prefix	First	M Last	Suffix	Nickname
Birthdate:	00/00/0000	SSN:	]	
Provider: Note:		•	]	
Billing Inf Patient is	formation			
Billin	Guarantor: g Category: Pre	-Operative REGULAR	··· Pt Rel: S	pouse 🔻

- 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.

Datient ID:	20090	Chart ID:		Office:	White Plains	•
Prefix	First	M Last	Suffix	Reg Prv:	Fitzpatrick, Daniel E. M.D., D.M	I.D 🔻
Ms.	Patient	Test		Dentist:		
Nickname:	P	Salutation: Prefix +	- Last Name 🛛 💂	Physician:		
Address:				Pri Ref:		
				Sec Ref:		
City:		State: Z	lip: -	Pat Ref:		
Province:		Country:		First Visit:	03/14/2017	
Home	()	Cells ( )		Policies Cove	ring this Patient:	
Work:	() -	Ext:	12.	Carrier	Plan	Cov Copa
WORK.						
Birth Dt:	00/00/0000	Sex:	-			
Soc Sec:		Marital St:	-			
river's Lic:		Ethnicity:	-	•	III	•
				New	Edit Delete	

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.

Patient Search	X
Name Patient ID	Office       Search       Recently Accessed         Search       First:         Birthdate:       00/00/0000         Patient ID:       Chart ID:         Chart ID:       SSN:         Find       Advanced         Include       @ Patients       All         Detail       Octail
Ok Cancel	New Edit Delete Profile

- 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.

wider: All Prov	viders 🗸 📉	Tuesday, January 5, 2021	Search Patient and Walk-In				
Office: Syracu	se v n		Patient:	Age:			
View: Daily D	etail V	W <d d=""> W&gt; Confirm</d>	Next Avail Appt Hist	Egit			
	Conroy, Alba B. Cons/Disc	Conroy, Alba B. Office Surgery	Conroy, Alba B. FU/RC/PSWU	Conroy, Alba B. 1	Conroy, Alba B. Hospital Surgery	Conroy, Alba B. 2	
9:00AM							
9:15AM							
9:30AM							
9:45AM							
10:00AM							
10:15AM							
10:30AM							
10:45AM							
11:00AM							
11:15AM							
11:30AM							
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2:45PM							
3:00PM							
3:15PM							
3:30PM							
3:45PM							
4:00PM							
4:15PM							
4:30PM							
4:45PM							
5:00PM							

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.

~	hurse	day, J	lanuai	ry 7, 2	021			
4	February 2021							
Sun	Mon	Tue	Wed	Thu	ir3	Sat		
31	1	2	3	4	his	6		
7	8	9	10	11	12	13		
14	15	16	17	18	19	20		
21	22	23	24	25	26	27		
28	1	2	3	4	5	6		
7	8	9	10	11	12	13		
	(		Today	: 1/7/	2021			

- 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.

Appointment	t Scheduler					
ovider: All Prov Office: Syracus View: Daily D	nders v v se v etal v d	Tuesday, January 19, 2021           W         O           D>         W>           Confirm	Search Patient and Walk-In Patient: Kushner, Jasmine - 16830 Next Avail Appt Hist	) Age: 41 years 10 month Egit	s	
	Conroy, Alba B. Cons/Disc	Conroy, Alba B. Office Surgery	Conroÿ, Alba B. FU/RC/PSWU	Conroy, Alba B. 1	Conroy, Alba B. Hospital Surgery	Conroy, Alba B. 2
9:00AM						
9:15AM						
9:30AM						
9:45AM						
10:00AM						
10:15AM						
10:30AM						
10:45AM						
11:00AM						
11:15AM						
11:30AM						
11:45AM						
12:00PM						

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.

Office:			✓ Staff:		~
Dates to Setup	From:	01/1	18/2012 💌 to	02/18/2012 🔻	
Days To Include					
Sunday 09:0	DO PM	to	06:00 AM	Template:	~
Monday 🗹 09:0		to	06:00 AM	Template:	~
Tuesday 🗹 09:0		to	06:00 8AM PM	Template:	~
Wednesday 🔽 🛛 09:0	DO OAM	to	06:00 AM	Template:	~
Thursday 🗹 🛛 09:0	0 OPM	to	06:00 AM PM	Template:	~
Friday 🔽 09:0	DO OPM	to	06:00 AM	Template:	~
Saturday 09:0	DO PM	to	06:00 AM PM	Template:	*

- 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.

Appointment Category Search						
Code Description C	LR Search Fields Code: Description: Find Display All					
Ok Cancel r	New Edit Delete Print					

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

🛎 Appointment	Categ 💶 🗙
Code:	]
Cell Color	Sample Cell Sample Text

- 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.

🖉 Appointme	ent Type Search		×
<u>Code</u> Desc	iption Lo	ckout Category	Search Fields Code: Description: Category Code: Find Display All
Ok Cano	el	New	Edit Delete Print

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

Lockout				
Code:				
Category:	(None)		- +	
Path:	(None)		V +	
EMR Type:	None			
Defaults Length Allow M Default	(mins): 15 🜩 ultiple Booking: 🗹 to Primary Col: 🗌	Chart Status EMR Consents EMR Notes Anesthesia	<ul> <li>✓ Encounter Slip</li> <li>✓ Referral Letter</li> </ul>	0

- 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.

SFind Next A	vailab	ole Appo	ointr	nent					
Appointment Date From 01/26/20:	2 to	02/09/2012	]	Colum	n			*	Find Now
Office Roches Off	ice	*	Appt	: Categor	y			~	New Search
Time of Day	a Billy DDS	*		Appt Typ Lengt	e h 15 (	*		*	
Morning Afternoon Evening All Day	Day of Sun	nflicting Appoi Week Mon 1 V	iue	s Wed	Thur V	Fri	Sat		

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.

🛎 Find Next /	Available App	ointment			
Appointment					Find Now
Date From 02/09/20	12 to 02/09/2012	Column	1	*	
Office Roches Off	fice 🔹	Appt Category	/	~	New Search
Provider Montague,	Kelly L 🔹 🔻	Appt Type	•	*	Exit
Time of Day		Length	15 🗘		
Morning	No Conflicting Appo	ointments			
Afternoon	Day of Week				
OEvening	Sun Mon	Tue Wed	Thur Fri	Sat	
⊖ All Day		$\checkmark$	$\checkmark$		

- 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.

ID: 1	6830	Name: Kus	nner, Jasmine		
10.1		Thurnet House	intery submitte		
Appointmen	t Consents	Audit Log			
Date	Time	Office		Pro	vider
1/19/2021	10:30 AM	1 Syracus	se	Cor	nroy, Alba B. DDS
Appointm	ent Type:				Length: 15 -
Column:	FU/RC/PSW	J	~	Allo	w Double Booking
Path:	(None)		~	+	
Note:					
User:	MDSSUPPOR	т		1	
User:	MDSSUPPOR Confirmed	T ] Check	In Status:	on	
User:	MDSSUPPOR Confirmed	T ] Check ner, Jasmine	In Status:	on	
User: [ Guar Total Ba	MDSSUPPOR Confirmed [ antor: Kushr alance: \$	T Check ner, Jasmine ;8,001.00	In Status: Budget Balan	on	\$0.00
User: Guar Total Ba Ins Pa	MDSSUPPOR Confirmed C antor: Kushr Ilance: \$ Due: It Due: \$	T Check er, Jasmine 8,001.00 \$0.00 \$0.00	In Status: Budget Balan Budget Payme Authorizatio	on ce: nt: ns: No F	\$0.00 \$0.00 Remain Visits:

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

Code: Description: Category Code: Find Display All

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.

Patient and Walk-In Sea	arch	X
Name	Patient ID Office	Search Recently Accessed Search Recently Accessed Search Reids Last, First: Bithdate: 00/00/0000 Patient ID: Chart ID: SSN: Find Advanced Include Patients All Detail
Ok Cancel		New Edit Delete Profile

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

Prefix First	M Last		Suffix	Dentist:	
				Physician:	
Nickname:				Ref 1:	
Address:				Ref 2:	
				Pat Ref:	
City:	St	ate: Zip:	:	Note	
Province:	Cour	itry:			
Home:	Cell: ( )	19	1		
Work: ( ) -	Ext:				
Binth Dt. 00/00/000	0	Com		Insurance Policies	_
Birth Dt: 00/00/000	U	Sex:	×	Carrier Plan	
Soc Sec:		Marital St:	~		
Driver's Lic:		Ethnicity:	×		
Email:				<	>
					- the
				New Edit Delete Eligi	Dility

- 5 Enter the patient's information in the fields.
- 6 Under Insurance Policies, click New. The Policy Entry window is displayed.

🖉 Allen, Keith J	
Active Policy?	
Carrier ID:	
Plan Description:	
Insured Party	Policy Details
Name: Allen, Keith	Policy Copay: \$.00
Patient Relation:	Policy Start Date: 00/00/0000
Insured Party SSN:	Policy End Date: 00/00/0000
Insured Party ID:	Release of Information: Y - Yes
Employer Name:	Assigned
Group No:	Authorize Payment 🗹
Group Name:	
Electronic Claims Information	
BCBS Plan Code:	CHAMPUS
	Sponsor Branch:
	Sponsor Grade:
	Sponsor Status:
<u>Ok</u> <u>Cancel</u>	

- 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 1. 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.

👯 Carrier Search	×
Carrier Name	ID Search Fields ID: Name: Active Codes Only  Find Display All Display All
Ok Cancel	New Edit Delete Print

2 Click New.

The Insurance Carrier Data Entry window is displayed.

🔀 Insurance Carrier Data Entry	
Carrier ID:	C Active
<u>Qk</u> <u>Cancel</u>	

- 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**.

Carrier Name	ID 🔺	Search Fields
1199 National Benefit Fund	1199	I ID:
21st Century Health & Benefit	21CP	
32BJ	32BJ	
AARP- United Healthcare	AARP	Name:
Accordia National	ACCORD	
ACEC	ACEC	the sector Only IT
Adjustco	ADJST	Active Codes Only
Aetna	AET	Find Display All
Aetna Medical	AETNA 🚽	
		a

- 3 Select the carrier you want to edit.
- 4 Click Edit. The Insurance Carrier Data Entry window is displayed.

있 Insurance Carrier Data Entry	_ 🗆 ×
Carrier ID: BC/BS Carrier Name: Blue Cross Blue Shield	Active
Qk <u>C</u> ancel	

- 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.

🕵 Insurance Plan Search				×
Plan Name	Street	City	H/D	Search Fields Plan Name: Carrier Name: Zip Code: Active Plans Only 🔽 Find Detal
Ok Cancel				New Edit Delete Print

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

😡 Plan Data Entry	
General Fees/Benefits Forms/IDs/Note	
Plan Information	
Plan Name:	Active
Contact:	Phone: ( ) - Ext: Coverage: @ Medical
Carrier:	Plan Type: Commercial  C Dental
Claim Center Information	Primary Contact Information
Street City Zip	Phone Number: Ext: Contact Person
	Claim Inquiry: ( ) -
	Authorization: ( ) -
	Eligibility: ( ) -
	MD Inquiry Cov: ( ) -
	MD Inquiry Claim:
New Edit Delete	Fax: ( ) -
Authorization	Coverage Information
Pre-certification Required	Procedure Category Cov % Default %: 0
Pre-certification Outside Network	
Create Duelicate Deptal Plan	New Delete
j Create Dupicate Dental Plan	
·	
Qk <u>Cancel</u>	

- 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.

👷 Insurance Claim Center Data Entry	×
Claim Submission Refund Processing NEA Payer	
Plan Name:	
Address 1:	
Address 2:	
City: State: Zip: -	
Province: Country:	
Phone: ( ) - Ext:	
Contact:	
Use Claims Submission Address for Refund Processing	
Qk Cancel	

- 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.

🔀 Coverage Information Data Entry	×
Procedure Category:	•
Coverage %: 0	
Qk <u>C</u> ancel	

- 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.

🔀 Plan Data Entry	
General Fees/Benefits Forms/IDs/Note	
Plan Information	
Plan Name: 21st Century Health	Active
Contact:	Phone: ( ) - Ext: Coverage: ( Medical
Carrier: 21st Century Health & Benefit	Plan Type: Commercial  C Dental
Claim Center Information	Primary Contact Information
Street City Zip	Phone Number: Ext: Contact Person
1760 Market Street 14thPhiladelphia 19103-	Claim Inquiry: ( ) -
	Authorization: ( ) -
	Eligibility: ( ) -
	MD Inquiry Cov:
	MD Inquiry Claim:
New Edit Delete	Fax: ( ) -
Authorization	Coverage Information
Pre-certification Required Pre-certification Outside Network Hospital Pre-certification	Procedure Category Cov % Default %: 0 🚔
Create Duplicate Dental Plan	New Delete
Qk <u>C</u> ancel	

- 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.

💱 Plan Data Entry	
General Fees/Benefits Forms/IDs/Note	
Fee/Benefit Information	
Fee Schedule: Standard	Auto W/D Amt Help
Allowable Schedule:	Please Select All Adio W/D Allit.
Auto W/D Code:	
Auto W/D Amt:	
Copay Procedure Code: Plan Maximum: \$.00	
Plan Copay Amt: \$.00 Ind Deductible: \$.00	
Accept Assignment: Fam Deductible: \$.00	
Ok Carrol	

- 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.

😡 Plan Data Entry		
General Fees/Benefits Forms/IDs	/Note	
Insurance Form Options	tage (1 )	NEIC Setup
UB-92 Form #:	Print Dental Codes On Med. Forms	SOP:
Primary Ins Proc Meth: Paper	DX Pointer Format: No Separation	Note
Procedure To Print: Procedure C	HCFA Plan Code: Other	Alert When Scheduling
Diagnosis Method: 1		
CLIA Filing: 0	▼ HCFA Box 33 GRP #:	
	HCFA Box 33 PIN #:	
Group/Provider IDs		
Group ID:	Prv Code Provider Name	Ofc ID EMC ID
Medigap ID Number:		
	<u>N</u> ew <u>D</u> elete	
<u>Ok</u> <u>C</u> ancel		

- 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.

<	New Prov	ider/Office/Plan ID	X
	🔎 🖲 Plan ID	-C EMC ID	
	Provider:		
	Office:	Test 🔽	
	ID:		
	Ok	Cancel	

- 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:

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.

chedule -		
Procedure Filter by Co	Category to Display: All 💽	
Code	Description	Fee 🔺
00100	Anes Proced of Head	\$.00
00102	Anes Rpr Cleft Lip	\$.00
00162	Anes Radical Surgery	\$.00
00164	Anes Bx, Soft Tissue	\$.00
00172	Anes Rpr Clft Palate	\$.00
00190	Anes Facial Bone n/s	\$.00
10060	I&D simple	\$.00
10061	I&D complicated	\$.00
10120	FB, rmv subq tiss:s.	\$.00
10121	FB, rmv subq tiss:c.	\$.00
10140	I&D hematoma:simple	\$.00
10160	Punture Aspiration	\$.00

- 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:

- 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:

- 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.

🕄 Update Regular
Selected Fee/Allowable Schedule
ID: 1 Name: Regular
Type: Fee Schedule
Save As Criteria Make a copy Save As Name: Regular_02
Percent of Original Fees Factor %: 100 Do Not Round
Qk Cancel

- 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.

💱 Referral Source Search	×
Name Group	Search Recently Accessed
Ok Cancel	New Edit Delete Print

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.

🔀 Referral Source Data Entry				_ 🗆 ×
Basic Extended Interests/Family	Public Relations			
Status / Category				
Referral Category:		•	Active	
Referral Group:			Exclude from Batch Mailings	
Personal Information				
Prefix:	Practice Name:			
First Name:	Address 1:			
Middle Init:	Address 2:			
Last Name:	City:		State: Zip: -	
Suffix:	Province:		Country:	
Nickname:	Work:	() - Ext:	Cell: (_) -	
Salutation:	Home:	() -	Fax: ( ) -	
IDs				
UPIN:		NPI:	Ref ID 1:	
Tax ID: Typ	e: 💌	Taxonomy:	Ref ID2:	
<u>Q</u> k <u>C</u> ancel				

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.

🕵 Ref	📿 Referral Source Data Entry				
Basic	Extended	Interests/Family	Public Relations		
Contact Information					
	Phone 1 De	disc:		Phone 1: ( ) -	
	Phone 2 De	:sc:		Phone 2: ( ) -	
	E-m	iail:		Send E-mail To: 🔿 Referrals in Group	
				C Referral Group	
Of	fice Manager	r		Miscellaneous	
	Prefix			Birth Date: 00/00/0000	
	First Name	4		Marital:	
1	Middle Name	:		Sex:	
	Last Name	<u>المعالمة المعالمة معالمة معالمة معالمة معالمة معالمة معالم</u>			
	Nickname	<u>ال</u>			
	Salutation	<u>ال</u>	<b>•</b>		
	Staff	(I)			
Notes					
					<b>A</b>
<u>_</u>	<u>.</u> k	<u>C</u> ancel			

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.

🔍 Ref	erral Sourc	ce Data Entry		_ 🗆 🗙
Basic	Extended	Interests/Family	Public Relations	
- In	Descript	Page Number		
-Cł	<u>N</u> ew Name	Delete	Spouse	
	New	Delete		
	ik l	Cancel		

- 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.

<b>Retivity/Gif</b>	t/Note for: (Uns	specified)			X
Date: Description:	02/24/2015	Category: Note	•	Type: Referral	
Qk	<u>C</u> ancel				

- 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.

ame	Group 🔺	Search Recently Accessed
Shah, Leonard		Search Fields
Shanck, Marshall DMD		Last, First: sh
Shangold, Jamie		State:
Shank, Paul		Practice Name:
Shapiro, Arnold S		Find
Shappell, Howard O, MD		Find
Sharpe, Jeffrey		Include
Shebairo, Martine		O All Referrals
Sheehan, Laurance		Active Referrals
Sheehy, Paul		
Sheinbaum, David		- Dotail
Shepard, Edward		Leonard Shah
Sher, Henry A		400 Garden City Plaza
Sherman, Otto		Suite 200
Sherman, Robert		Garden City, NY 11530
Sherz, David		( 516 ) 739 - 8659
Shevde, Efriam		General DDS/Pediatric DDS

- 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.

	Find Display All
--	------------------

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

🔀 Referral Category Data Entry	<u>- 0 ×</u>
Category Code: 26 Description:	
Qk Qance	

- 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.

Code	Description	Search Fields
.6	Cardiologist	Code:
7	Chiropractor/Chiropractic Practice	
5	Cleft Team St. Charles	Description
8	Ear, Nose Throat Specialist	Description:
2	Endodontist	
	General DDS/Pediatric DDS	
3	Gynecologist	Find Display All
3	LAWYERS OFFICE	

- 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.

💱 Referral Source Interest Search	×
Code Description	Search Fields
	Description:
	Find Display All
Ok Cancel	New Edit Delete Print

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.

Code 1 2 3 4 5 6 8	Description Christmas Card List Ortho Course Guest Women's Study Club Symposium Mailings Golf Yankees Fan Reception	Code: Description: Find Display All
---	--	---

- 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.

😨 Referral Source Search	X
Rame Group	Search Recently Accessed
Ok Cancel	New Edit Delete Print

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

Search Fields Last, First: sh
Last, First: sh
Stater
State.
Practice Name:
Find
_ Include
C All Referrals
<ul> <li>Active Referrals</li> </ul>
Leopard Shah
400 Garden City Plaza
Suite 200
Garden City, NY 11530
(516) 739 - 8659
General DDS/Pediatric DDS

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

🕵 Referral: Roberta Stark MD	
4 8 9 8 4 4 4	
Demographics Control C	Public Relations     Last Activity:     Last Gift:     Staff     Office Manager:     Staff;     Last Activity:
Referred Patients (double-click to go to patient)	Notes
First Visit Prov Patient Name	Date Note

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:

A	Edit Referral
86 86 86 86 86	Label
	Financial
8	Profile
	Letters
	Rating History
4	Referred Out
<b>-</b> ¶	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.

ame	Group Search	Recently Accessed
Shah, Leonard	- Search	Fields
Shandk, Marshall DMD		Last, First: sh
Shangold, Jamie		State:
Shank, Paul	Prac	ctice Name:
Shapiro, Arnold S		The l
Shappell, Howard O, MD		Fina
Sharpe, Jeffrey		•
Shebairo, Martine		C All Referrals
Sheehan, Laurance		Active Referrals
Sheehy, Paul		
Sheinbaum, David	- Dotal	
Shepard, Edward	Leopar	rd Shah
Sher, Henry A	400 Ga	arden City Plaza
Sherman, Otto	Suite 2	200
Sherman, Robert	Garder	n City, NY 11530
Sherz, David	(516)	739 - 8659
Shevde, Efriam		al DDS/Pediatric DDS

- 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.

# 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.

CS WinOMS Software:	OMS Pho	enix 3.0 Testing	QA-1 RIG - MDSSU	IPPORT - [547	79: Jon22580 H Doe22580	(EMR - Rx)]								
Gerald File Posting Billin	g Report	ts Experts Sc	heduler Letters	Tables Uti	lities Windows Help									
b 4 🛛 À 🧐	R 🕹	1 🖌 🔛 🕯	5 🛛 🖬 🕯	i 🗜 🗐										
付 54779: Jon22580	H Doe2	2580					5 6	1 🖻	< 0 x	ľ			s	chedule Snap
Jon22580 H Doe2	Appoint Reg Prv Lyu, Pet Primary	itment: : er DDS, MD y Referral:	Insurance Medical Ins: Dental Ins: DELTA Delta Di Californ	ental - la	<u>Medical History</u>	here is no medical his	Medicat story poste	ions ed for the	patient.	3	Allergies.		Medical Alerts	
05/05/1951 Male, 69y 1m	Second	ary Referral:												
EMR Summary	Press	rintions												
Procedure Hx	Tipe	Date	Rr	Description		Frequency		Quantity	Days Supply	Diagnosis Cod	Prior State	Provider		
Patient Reg		06/23/2020	+									Dr. Peter Lyu DDS, MD		
RX Follow-ups Implants EMR Consents Anesthesia Notes × Images Attachments Treatment Plans				Augmentin Augmentin Norce 10/33 Pencill w/Penergan	300 mg 375 mg 300 mg 5 Refits:0 55 mg ↓									

- 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.

Printer		
Name: Windows Default Printer	•	Auto Select
Type: Brother HL-L2340D series (Copy 2) Where: Ne03:		Windows Default
Page Range	Copies Number of copies: 1	
First page only     Pages:	Additional Information	
Enter page numbers and/or page ranges separated by commas. For example, 1,3,5-12		
Merge	Print Preview Cancel	

- 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.

Alerts for :	Patient Test			
Date	Туре	User	Alert	
New	Edit	Delete	Copy Print Close	

5 Click New. The Add Alert window is displayed.

👰 Add Alert : Pat	ient Test	
Alert Type: Date Entered: Alert:	Financial	Created By: MDSSUPPORT Critical:
<u>Qk</u>	Cancel	

- 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.

Printer		
Name: Windows Default Printer		▼ Auto Select
Type: Brother HL-L2340D series (Copy 2)	Windows Default	
Where: Ne03:		
Page Range	Copies	
● <u>A</u> I	Number of copies: 1	
Eirst page only		
O Pages:	Additional Information	
Enter page numbers and/or page ranges separated by commas. For example, 1,3,5-12	1 alert to print.	

- 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**.

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.

Visit	Shortcuts	Diagnosis	Treatm	nent Plans	Procedures	Prescriptions	Recall	Letters	Note								
															In	teractio	n p
Туре					Billing						Service						
V A	ctual Charges	Treatment	nent Visit		💿 Me	dical First 🛛 🏾	) Dental I	First			Provider:		Office:				
Tick	et:				© Me	dical Only 🏾 🏾	Dental	Only			Dr. Daniel Fitzpatrick M.D., D.M.D	•	White Plains				•
				•	Pa	tient					Service Facility:		Department:				
											(None)	•	(None)				•
Sele	cted																
Post	Туре	C	ode	Description										Tooth	Mod	TVisit	Actual
<b>V</b>	Insurance Bil	lling MF	F	Medical Firs	ical First 2												
	Provider	DE	EF	Dr. Daniel Fi	itzpatrick M.I	D., D.M.D										V	V
	Office	1		White Plains	3											V	V
															Submit	F	leset

- 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.

😡 Consent Form Template Search	×
Name	Search Fields Consent Form Template Name Category Categor
Ok Cancel	New Edit Delete Print

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

😳 EMR Consent Form Template Maintenance		- • •
Template Details		
Name:	Staff/Prv:	Active
	Category:	System
		- System
Note Template Snippets		
[Nomal] • Arial • 10 • B I U	ĒĒĒ   100% ▼   \$E \$E \$E   ■ ¶	{I} {M} {S}
L	····[····[ <sup>0</sup> ··[·····] <sup>7</sup> [·····[	B ABC
		Â
		=
		Make a conv
		маке а сору

- 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 mext 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.

MR Components Print Layout Search	X
Description	Search Fields
	Description:
	Find Display All
	Naw Fdit Dalata Print
Ok Cancel	New Edit Delete Print

- 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.

Print Layout
Description: Consent Forms Default Layout 📃 Indude Provider Signature on Signed Document Printouts
Opening Text Closing Text
▼         B         I         U         I
ا۱۰۱۰۱۰۱۰۱۰۱۰۱۰.
Î.
• • • • • • • • • • • • • • • • • • •
OK Cancel

- 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.
- $6 \qquad \text{Click} \overset{\text{\tiny \baseline}}{\longrightarrow} \text{to check the spelling of the layout.}$
- 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.

😳 Complete Consent Form for: 9088: Practiceworks .	I Test
Consent Form Template Selection	Consent Form
Staff/Prov: (All Providers)	Date: 03/15/2017 Author: Fitzpatrick, Daniel E. M.D., D.M.  Created: 03/15/2017 By: MDSSUPPORT
Consent (Select Consent Form)	Status: In Progress Signed On: 00/00/0000
Diama Di ana ana ana	
Ivormaij Anai	$\begin{array}{c c c c c c c c c c c c c c c c c c c $
	······································
	Â
	E
Save & New Save & Next Save & Done	Lock Author Signature

- 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.

# 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.

Experts	Scheduler	Letters				
Co	Contact Expert					
Of	fice Expert					

# **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.

	Financial Insur	ance	Statements	Defaults Miscellaneous Letters & Labels Exp	erts Audit Log & Sec	urity		
Contact Expert								
Require Contact Note: Aways AR Expert Default Refund Code: RF - Refund Transaction								
Kenearra	ging/balance. E							
Office Expert	t							
Run as	a Background P	rocess		Office Expert Data will be manually refreshed			•	
Of	ffice Expert Category	^	Process	Description	Priority	Display Mode	^	
(All Office Ex Aged Receiv	opert Items) ables	=	⊠ 🔺	Aged Receivables - 91+	<ul> <li>Note</li> <li>Important</li> <li>Urgent</li> </ul>	<ul> <li>Grid</li> <li>Narrative</li> </ul>		
Appointment Appointment	t Confirmation t Status		₹.	Aged Receivables - All Aging	<ul> <li>Note</li> <li>Important</li> <li>Urgent</li> </ul>	<ul><li>● Grid</li><li>○ Narrative</li></ul>		
Budget Plan Claims Submi	Processing ission (Resubmit	)	<b>• •</b>	Aged Receivables - Current	Note     Important     Urgent	<ul><li>● Grid</li><li>○ Narrative</li></ul>		
IL DELACTION	es 			Edit Delete	i di dent			

- 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.

Date	Expert	Description	Assigned To	Status
1/12/2002	Patient Demographic	Patient Demographic report generated on 11/12/2002	(All Users)	Completed
1/13/2003	Stage Tracking	Stage Tracking generated on 01/13/2003	(All Users)	Completed
7/30/2009	Accts Receivable	Aging switching to collections	(All Users)	Active
06/26/2014	Statement Reconciliation	Statement Reconciliation generated on 06/26/2014	(All Users)	Active
06/27/2014	Statement Reconciliation	Statement Reconciliation generated on 06/27/2014	(All Users)	Active

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.

Date Created	Expert Type	Description	Assigned To	Status
1/12/2002	Patient Demographic	Patient Demographic report generated on 11/12/2002	(All Users)	Completed
1/13/2003	Stage Tracking	Stage Tracking generated on 01/13/2003	(All Users)	Completed
7/30/2009	Accts Receivable	Aging switching to collections	(All Users)	Active
6/26/2014	Statement Reconciliation	Statement Reconciliation generated on 06/26/2014	(All Users)	Active
5/27/2014	Statement Reconciliation	Statement Reconciliation generated on 06/27/2014	(All Users)	Active

2 Click New. A list of categories is displayed.

Aged Receivables						
Appointment Confirmation						
Claims Submission						
Contact Notes						
Patient Demographic						
Recall						
Stage Tracking						
Statement Reconciliation						
Treatment Plan						

- 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.

	Financial I	nsurance	Statements	Defaults Miscellaneous Letters & Labels Ex	perts Audit Log & Sec	urity	
Contact Exp	pert						
Require	Contact Not	te: Always	-	AR Expert Default Refund Code:	RF - Refund Transactio	n	-
Refresh	Aging/Balanc	e: 🔽					
Office Expe	rt						
Run a	as a Backgrou	ind Process		Office Expert Data will be manually refreshed			•
	Office Expert	•	Process	Description	Priority	Display	
	Category	- Â	FIOCESS	Description	Phoney	Mode	- Â
(All Office I	Expert Items)	)	🛛 🗛 🔍	Aged Receivables - 91+	🔘 Note	💿 Grid	
Aged Rece	ivables	E			Important	O Narrative	
Appointme	nt Confirmatio	on	Vi	Aged Receivables - All Aging	Note	Grid	
Appointme	nt Status				Important	Narrative	
Budget Pla	n Processing				O Urgent	0.01	
Claims Sub	mission (Resu	ıbmit)	□∀	Aged Receivables - Current	Note Important	Grid Narrative	
Contact No	ites				Urgent	- Harrance	Ŧ
	nce						
Credit Bala		-	New	Edit Delete			

- 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.

	ce Sta	atements	Defaults Miscellaneous Letters & Labels Experts	Audit Log & Sec	urity				
Contact Expert									
Require Contact Note: Always 🔍 AR Expert Default Refund Code: RF - Refund Transaction 🔹									
Refresh Aging/Balance: 🔽									
Office Expert						_			
Run as a Background Proc	ess [		Office Expert Data will be manually refreshed			-			
Office Expert		Process	Description	Priority	Display	*			
Category					Mode				
(All Office Expert Items)		🔽 🛕	Aged Receivables - 91+	🔘 Note	🔘 Grid				
Aged Receivables	Ξ			Important	O Narrative				
Appointment Confirmation			Aged Receivables - All Aging	Note	Grid				
Appointment Status			Aged Receivables - All Aging	Important	Onu Narrative				
Rudget Dian Dressering				O Urgent	0				
buuget Plan Processing		- 🖓 /	Aged Receivables - Current	Note	Grid				
Claims Submission (Resubmit)				Important	Narrative				
Contact Notes				() Urgent		*			
Constitution of the second	- [	Now	Edit						
Credit Balance		INCAN	Luit Delete						

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

🔯 Aged Receivables R	eport	×		
Report Criteria				
Aging of Patient:	All	Minimum Balance: .00		
Billing Category:	All Billing Categories	Credit Balances: Include 💌		
Patient Office:	White Plains 🔹	Payment Cutoff Date: 00/00/0000		
Provider Type:	Regular Provider 🔹	Held Statements: Include 💌		
Provider:	All Providers	Include All Unapplied Payments 📝		
Collections:	Include 🔻	Include Adjustments 📝		
Balances to Include:	All Detailed 🛛 🔻	Move Credit Balances		
Contact Expert Desc:				
Format ✓ Detail Recap	Group By	Sort Order ③ Last Name ① ID Number ③ Balance		
Qk Cancel				

- 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.

Appointment Confirmation
Office: White Plains
Date: 03/15/2017 🗨 to 03/15/2017 🗨 📖
Contact Expert Description
Cancel

- 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.

Report Criteria	
Insurance Plan:	
Service Office:	White Plains    Provider: All Providers
Claims:	Regular Claims
	Suppress Zero Balance Claims
🔍 Date 🔘 M	in/Max
From:	03/15/2017 🔻 to 03/15/2017 👻 📖 Min Days Over: 30
From:	03/15/2017 v to 03/15/2017 v m Min Days Over: 30 Max Days Over: 0
From: Contact Expert De	03/15/2017 <b>v</b> to 03/15/2017 <b>v</b> m Min Days Over: 30 Max Days Over: 0
From: Contact Expert De Group By	03/15/2017 v to 03/15/2017 v Min Days Over: 30 Max Days Over: 0 sc: Sort By
From: Contact Expert De Group By	03/15/2017  to 03/15/2017  Min Days Over: 30 Max Days Over: 0 sc: Sort By Ø Patient Name
From: Contact Expert De Group By Office	03/15/2017 v to 03/15/2017 v m Min Days Over: 30 Max Days Over: 0 sc: Sort By @ Patient Name Submission Days

- 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.

😧 Contact Notes Report 📃 🔀	
Report Criteria	
Reminder Date:      Note Date:	
From: 03/15/2017 🗨 to 03/15/2017 🗨 📖	
Type: HIPAA Disclosure	
Patient Office: White Plains	
User: MDSSUPPORT -	
Contact Expert Desc	
O Date     O Name And Date	
C Last Name Date And Name	
Qk Cancel	

- 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.

Q Deleted Transactions	Report
Report Criteria	
Date: Deletio	n Date   03/15/2017 to 03/15/2017
User: Deleted	d By: ▼ (All Users) ▼
Posting Office: White P	Plains
Qk <u>C</u> ancel	

- 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.

Insurance Queue Filter Options     Service Office      Posting Office      O	ther Office:
Provider: All Providers Form #:	Plan:
Paper Claims PTE Claims eClaims Actual Claims Medical Claims Claims On Hold Dental Claims Claims Not On Hold	Required     Pending     Accepted (Has NEA#)       Not Sent     Rejected     No NEA Status (Blank)       In Progress     Ignored
<u>Ok</u>	

- 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.

Batch Billing Statements	X
Selection Criteria         From Patients' Last Name:         to         Patient Office:         All Offices         From Patient ID:         to         Billing Category:         From Patients' Zip Code:         to         Patient Total Balance >         .00         Patient Due >         .00	Options Format: Open Item (Plain Paper)  Stmt Msg Expiration Date: 03/15/2017  Include History (Start Date: 00/00/0000  ) Cycle Billing Apply Service Charges Consolidate Guarantor Statement Statement Message
Sort Order ③ Patient Last Name   Patient ID   Patient Zip Code	
Miscellaneous           ØPrint Summary Report         Create Stmt Recon Expert	

- 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.

😧 Office Expert	• X
Results Created: 03/15/2017 Display Mode: Narrative 💌 Group By: Confirmed	
Appointment Confirmation 2 Days In Advance No Appointments found that match specified criteria.	*
Contact Notes For Today	
Insurance Claims in Insurance Claim     ≡	
Appointment Status - Yesterday's No Shows	
🛕 Recall - More than 60 Days Overdue	
Peleted Transaction - Begin - End of Month	*
Refresh Exit	

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.

All Reports			
Reports View	Report Criteria	Press page down to view additional pages	
⊡– Daily ^	Posting Date		
Bank Deposit Slip	From: 07/15/2021 V To: 07/15/2021 V		
Day Sheet	Groups		
Day Sheet Audit	Default practice name		
Night Call List			
Provider Daily KPI	Practice: All Practices		
□- Data Export	practice name		
Patient Demographics			
Transactions			
- Enterprise			
Enterprise Aged Receivables			
Practice Rollup	Group By		
Doctor Days	Processing Center		
Enterprise Summary Report By	Format		
Enterprise Summary Report By	OSummary		
Patient Count Analysis	Detail by Office		
Procedure Mix	O Detail by Provider		
Referral Procedure Mix			
Enterprise Data Export	Save Criteria Generate Report		
□- Financial			
Adjustment Analysis			
Aged Receivables Report			
Budget Plan Report			
Credit Balance Report			
Deleted Transactions Report			
Monthly Adjusted Receipts Rep			
Payment Code Analysis			
Payment Method Analysis			
Practice Summary			
Procedure Analysis			
Production Report			
Receivables by Referral			
Sales Tax			Printer
· · · · · · · · · · · · · · · · · · ·		Merge Expor	t Adobe PDF Converte

# **Daily Reports**

The **Daily** reports include:

Bank Deposit Slip	
Day Sheet	
Day Sheet Audit	
Night Call List	
Provider Daily KPI	

- 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 Referral Action Referral Demographic Procedure Trend Analysis Zip Code Analysis

Rankings & Ratings

- **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 Appointment Status Scheduler Reports

- **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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