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Carestream DENTAL

# INITIAL TRAINING WORKBOOK

## CS OrthoTrac
## Practice Management Software



Your Guide to a Successful Transition



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## CS OrthoTrac Practice Management Software

# Initial Training Workbook

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**Appendix A—Migrating Your Software to OrthoTrac Software**

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# Introduction

The CS OrthoTrac program management software uses the Microsoft Windows operating system. See the CS OrthoTrac online help for more information.

## Pre-Training Contact Information

As you prepare to use the software, you will work with our trainers and members of the Implementations, Conversions, Configurations, and Electronic Services teams.

### Implementation

A member of the Implementations team will call you to schedule training and to provide the hardware requirements and an overview of the installation.

### Electronic Data Conversion

If you transfer data electronically, a member of the Conversions team will help you with the following things:

- Submit data for a test conversion.
- Answer questions about how you use your software.
- Install a test conversion.
- Sign a document stating that you are aware of what will be converted.
- Submit data for a final conversion at least four days prior to the start of training.

### Configurations

A member of the Configurations team will contact you to customize your software by having you complete practice-specific worksheets and by setting up your procedure codes and schedule.

**Note**

For information about the Zuelke Automated Credit Coach, see the online help.

### Electronic Services

A member of the Electronic Services team will contact you to set up services to submit claims and statements electronically and to send credit card transmissions.

### Training

Your trainer will work with you in three phases and will contact you to do the following things:

- Confirm the training dates and times.
- Interview you in preparation for training.
- Review the training agenda.

## Backing Up Data

Back up your data every day. You should have a backup for each day of the week, with copies stored off-site. Keep your backups in a fire-resistant safe.

**Note**

Customer Support does not provide assistance on your backup procedures.



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Lesson 1

# Understanding the Software

This lesson includes:

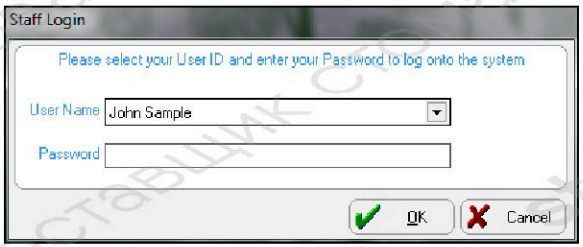

- Using the Main Menu on page 1
- Using the Lookup Window on page 3
- Using the Patient Chart on page 4


To open the OrthoTrac software:

1 On your desktop, double-click the **OrthoTrac Software** icon. When the software opens, the main menu and the **Staff Login** window are displayed.

**Note:** If you have more than one data set, the **Select Data Set** window is displayed first. Select a data set and click **OK.**

The main menu and the **Staff Login** window are displayed.




2 Select your name from the **User Name** list, or enter your user ID, and type your password in the **Password** field.

3 Click **OK**. If you have a To Do list or staff mail, the windows are displayed.

4 Click **Close**. The main menu is displayed.

To close the OrthoTrac software:

1 Close any open windows in the software.

2 Click the close button in the upper-right corner of the main menu.

## Using the Main Menu

After opening the OrthoTrac software, the main menu is displayed across the top of your screen.



Table 1 on page 2 shows the main menu buttons that are available.



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**Note**

Some of these features are also accessed with the function buttons.

When you hover over an icon, the name of the feature is displayed.

**Table 1 Main Menu Buttons**

| | |
|---|---|
|  Open Patient Chart |  Quick Add |
|  Schedule Appointment |  Patient Checkout |
|  Financial Functions |  Insurance Functions |
|  Word Processing |  Collections Activity |
|  Contact Experts |  Referrals |
|  Patient Flow |  Office Expert |
|  Maintenance/Set-up |  Roladdress |
|  Checklist |  Timeclock |
|  TeleVox T.LINK |  Staff Login |
|  Personal To Do Items |  Staff Mail |

The following options are available on the main menu:

- **File**
  - **Prepare Backup**
  - **Satellite Extraction**
  - **Printer Setup**
  - **Exit**
- **Functions**–Enables you to access the same features available when using the main menu buttons.
- **Reports**–Enables you to access the reports available in the following categories:
  - **Patient**
  - **Responsible Party**
  - **Schedule**
  - **Financial**
  - **Miscellaneous**
  - **Charting**
  - **Patient Tracking**
  - **Patient Flow**
- **Options**
  - **Copy Database Files**–When prompted to exit the software after making a change, select **Copy Database Files** to update the information for that computer.
  - **Environment**–Enables you to configure a single workstation for multiple databases, set paths for folders, and select settings for several areas of the software.
- **Charts**–Select from a list of all charts currently open. **Close All**–Enables you to close all open charts.
- **Help**
  - **OrthoTrac Help**–Accesses the online help.



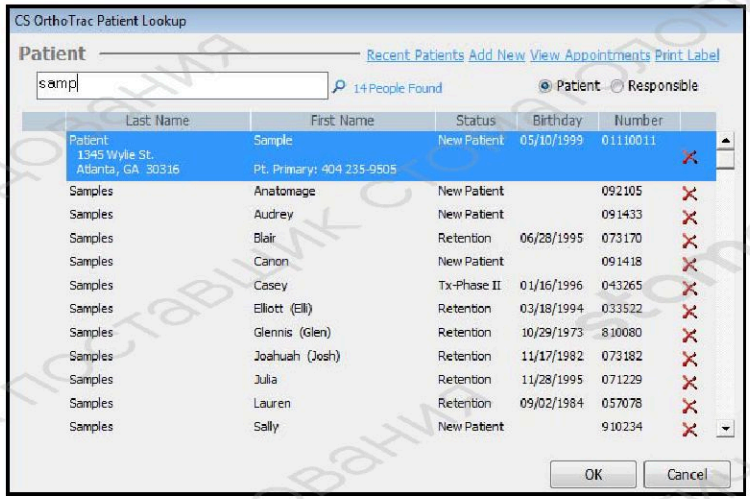
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- **What's New Video**–Enables you to view a video of new features to the software.
- **Carestream Dental Institute**–Accesses the online training website, which offers courses for the software.
- **Contact Us**–Accesses the Carestream Dental website, which provides ways for you to contact us.
- **OrthoTrac on the Web**–Accesses the CS OrthoTrac software website.
- **System Requirements on the Web**–Accesses the system requirements for the CS OrthoTrac software.
- **About CS OrthoTrac**–Enables you to access your software version number and important system data.

## Using the Lookup Window

The lookup window enables you to sort through lists of patients, doctors, and so on. The following **CS OrthoTrac Patient Lookup** window shows the basic functions of the lookup window.




To access the **CS OrthoTrac Patient Lookup** window, click the **Open Patient Chart** button on the main menu.



Open Patient Chart

## Accessing Records

You can access records using search methods.

### Search by First or Last Name

Type a full or partial first or last name in the search field, highlight the name, and click **OK**.

### Search by Partial Last Name/Partial First Name

Type the first few letters of the last name, a comma, and then the first few letters of the first name in the search field, highlight the name, and click **OK**. For example, to search for John Smith, type "Sm, Jo."

### Search by Combined Middle Name/Last Name

To differentiate between patients with the same first and last name, you can configure the software to list a patient's middle name or middle initial before the last name in lists.

### Search by Patient or Responsible Party

Type a patient's or the responsible party's first, middle, last, or common name; account #; phone #; e-mail address; insured ID; or Social Security number. Highlight the name and click **OK**.

## Adding and Removing Records

To add a record from the lookup window, click **Add New**.

To remove a record from the lookup window, select the record, click the red **X**, and provide a reason for removing the record. Then click **OK** and **Yes**.



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## Printing Labels

To print an individual mailing label, chart label, or appointment label using a stand-alone label maker:

1 In the lookup window, select the name for which you want to print a label and click **Print Label**. The **Individual Label** window is displayed.

2 Select the type of label to print.

3 Make changes to the appearance of the label, if necessary, by selecting from the drop-down lists in the **Font** and **Size** fields and by clicking the **Bold**, **Italic**, and **Underline** buttons.

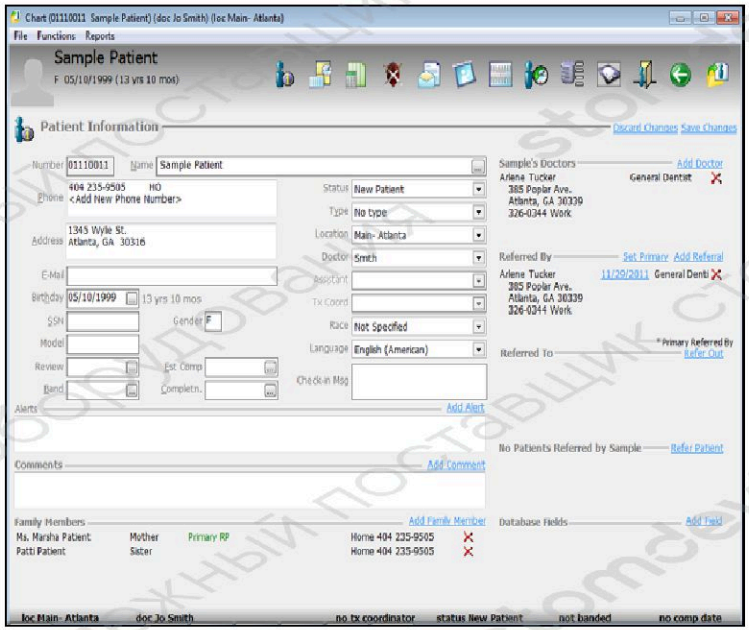
4 Select an option from the drop-down list in the **Selected Printer** field, or click **Setup** to display the **Print Setup** window and change the options for the printer.

5 Click **OK**.

## Using the Patient Chart

You can access a patient chart from the following areas:

- After finding a patient using the **CS OrthoTrac Patient Lookup** window
- After adding a new patient
- From the patient flow module
- From the charting module
- From the daily schedule
- From a contact expert report






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Table 2 shows the patient chart buttons that are available.

**Table 2 Patient Chart Buttons**

| | |
|---|---|
|  Patient Information |  Schedule Appointment |
|  Financial Functions |  Claims |
|  Word Processing |  Snapshot |
|  Charting |  Patient Tracking |
|  Database Fields |  Orthodontic Imaging |
|  Patient Checkout |  CS OrthoTrac |
|  Patient Lookup | |



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## Skill Sharpeners

### Exercise 1—Verify an Appointment Time

A patient's mother calls the office and tells you that her daughter has a scheduled appointment sometime next week, but she has misplaced the appointment ticket. How can you help her?

To find a patient's scheduled appointment:

1 On the main menu, click the **Open Patient Chart** button. The **CS OrthoTrac Patient Lookup** window is displayed.

2 Type the patient's name and highlight it.

3 Click **View Appointment**. The **Appointments** window is displayed, showing current appointment information for the patient.

### Exercise 2—Find the Last Patient Viewed

You are working in a patient chart and have to take a phone call to schedule an appointment. After finishing the call, you attempt to return to the patient chart you were working in, but you realize that instead of minimizing the patient chart window for the first patient, you closed it. Now you can't remember the name of the patient whose chart you were working in. What can you do?

To view a list of the last five patient records you worked with:

1 From the main menu, click the **Open Patient Chart** button and click **Recent Patients**.

2 Click the name of the patient whose file you want.

**Tip**

To add multiple comments to a roladdress card, double-click the text in the **Comment** field and click **Add**. Type additional comments and click **OK**.

### Exercise 3—Add a Vendor to the Roladdress

A sales rep for an orthodontic supply company gives you a business card. How do you save the information in the software?

To add a card to the roladdress:

1 Click the **Roladdress** button on the main menu. The **Roladdress** window is displayed.

2 Click **Add New**. The **Roladdress Card** window is displayed.

3 Click **Business** at the bottom of the window.

4 In the **Name** field, type the name of the business.

5 In the **Address** field, double-click on **<Add Address>**. The **Edit Address** window is displayed.

6 Type the address information in the fields and click **OK**.

7 In the **Phones** field, double-click on **<Add New Phone Number>**. The **Add Phone Number** window is displayed.

8 Type the phone information in the fields and click **OK**.

9 In the **Comment** field, double-click on **<Add Comment>**. The **Add Comment** window is displayed.

10 Type a comment and click **OK**.

11 Click **OK**.



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Lesson 2

# Using Maintenance Functions

This lesson includes:


- Adding New Carriers on page 7
- Setting Up Carrier Coverage on page 9
- Adding Employers on page 10
- Adding Referral Sources on page 10
- Adding Outside Doctors on page 11
- Adding Calendar Days Using Schedule Maintenance on page 12

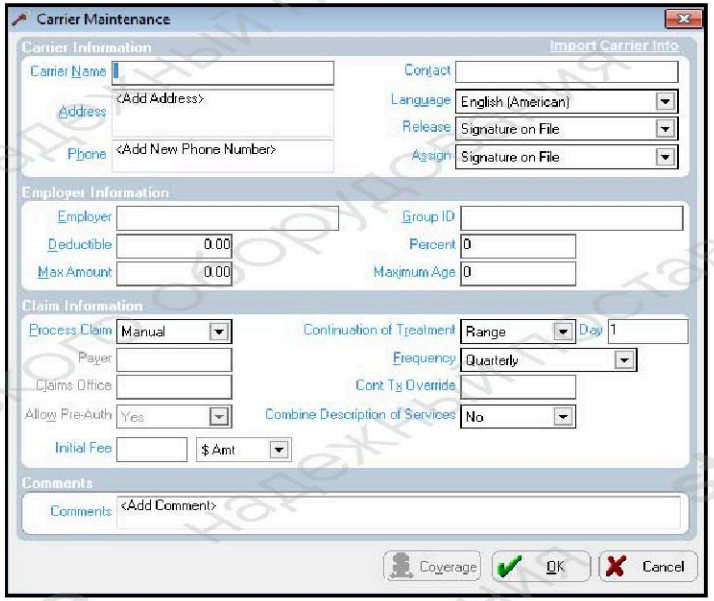

## Adding New Carriers

During the conversion process, you might need to verify or add carrier information. As you add new patients, you add insurance carriers and employers. Use the carrier maintenance function to add, update, and delete carriers.

To add a carrier:

1 Click the **Maintenance/Set-up** button and select **Carrier Maintenance**. The **CS OrthoTrac Carrier Lookup** window is displayed.

2 Click **Add New**. The **Carrier Maintenance** window is displayed.




The **Carrier Maintenance** window has four sections:

- Carrier Information
- Employer Information
- Claim Information
- Comments

**Note**

You cannot delete a carrier to which a patient or responsible party has been attached.



**Maintenance/Set-up**



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**Note**

Be consistent when entering the insurance company name. Different spellings of the carrier name result in problems when you use the bulk payment feature.

## Adding Insurance Carrier Information

To add carrier information:

1 Type the carrier's information in the appropriate fields.

If the carrier already exists, click **Import Carrier Info** to import the name, address, and phone number.

2 Select an option in the **Release** field.

3 Select an option in the **Assign** field to specify the assignment of benefits.

## Adding Employer Information

To add employer information:

1 Press Tab or click in the **Employer** field. Press Enter or double-click in the field to display the **CS OrthoTrac Employer Lookup** window.

2 Type the employer name and press Enter. If the employer is already in the list, the name is selected. Click **OK** to attach the employer to the carrier.

**Note:** Click **Change** to edit the data for an employer. If the employer is not in the list, click **Add New**.

3 In the **Deductible** field, type the amount the patient must pay.

4 In the **Max Amount** field, type the dollar amount of the patient's maximum benefit (yearly or lifetime) minus the deductible.

5 In the **Group ID** field, type the unique identification number for the insurance carrier/employer.

6 In the **Percent** field, type the percentage that the carrier pays.

7 In the **Maximum Age** field, type the maximum age of a patient for whom the insurance provides orthodontic benefits.

## Adding Claim Information

To add claim information:

1 Press Tab or use the mouse to position the cursor in the **Process Claim** field and select **Manual** or **Electronic**.

2 In the **Payer** field, type the five-digit ID number found in the Payer List.

The **Payer** field is inactive if you are submitting claim forms manually to the carrier.

3 In the **Claims Office** field, type **NOCD,** unless different in the Payer List.

The **Claims Office** field is inactive if you are submitting claim forms manually to the carrier.

4 In the **Allow Pre-Auth** field, select **Yes** or **No**.

5 In the **Continuation of Treatment** field, select an option from the drop-down list. The default is **Range**, but you can select from the following options:

- **None**–Carrier does not require continuation of treatment claims.
- **Last Day of Month**–Carrier accepts the last day of the month.
- **Banding Date**–Carrier requires the date of banding.
- **Range**–Carrier accepts the date you select or the first day of the month.
- **Specific**–Carrier requires the date on which the patient is seen in the office.

6 In the **Frequency** field, select an option from the drop-down list. The **Frequency** field indicates how often an insurance carrier requires a continuation of treatment claim to be filed.



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7 In the **Cont Tx Override** field, type the continuation of treatment code for carriers that require a different code from the ADA continuation of treatment code; otherwise, leave this field blank.

8 In the **Combine Description of Services** field, select **Yes** to combine monthly amounts within a billing period into one date of service entry or **No** to itemize each month within the billing period.

9 To add additional reference information about a carrier, use the **Comments** field.

10 Click **OK**.

## Setting Up Carrier Coverage

After you have added a new insurance carrier, you can set up the amount of coverage the carrier pays for each procedure. Charges are attached to your procedure codes, and you can enter the total amount the carrier pays and the amount for which the patient is responsible.

To enter carrier coverage:

1 In the **CS OrthoTrac Carrier Lookup** window, select the carrier and click **Change**. The **Carrier Maintenance** window is displayed.

2 Click **Coverage**. The **Insurance Coverage** window is displayed.




3 Click the **Lock** icon in the right corner of the window to set the status of the carrier to **Locked** or **Unlocked.**

4 Select the coverage type for the carrier by clicking one of the following options:

- **Variable**–The carrier pays different percentages for different procedures; for example, 100% for records, 80% for exams, 50% for treatment.
- **Fixed**–The carrier pays the same percentage for all procedures; for example, 50%. If you select **Fixed**, type the percentage amount, and the software assigns this amount to all procedures.

**Note**

If you edit the procedure codes and then make a global change, the changes do not apply to carriers you have locked.



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5 Select the first procedure code that you want to edit for this carrier and type information in the following columns:

- **ADA**–The ADA code assigned to this procedure.
- **Fee**–The doctor's charge, posted to the responsible party's ledger.
- **Ins**–The amount printed on the insurance claim, which is the maximum amount the carrier pays. This amount can never be more than the doctor's fee.
- **Coverage**–The percentage of the charge the carrier actually pays. If you selected **Fixed** and typed a percentage, the **Coverage** column is automatically populated and cannot be changed.

6 Click **OK**.



**Maintenance/Set-up**

## Adding Employers

In the OrthoTrac software, you typically link employers with insurance carriers. If you are adding carriers and employers, you can perform both operations from the **Carrier Maintenance** window. However, if you need to add only an employer or make a change to an employer's demographic information, you can use the employer maintenance function.

**Note**

To change employer information, select the employer in the CS **OrthoTrac Employer Lookup** window, click **Change**, make your changes, and click **OK**.

To add an employer:

1 Click the **Maintenance/Set-up** button and select **Employer Maintenance**. The **CS OrthoTrac Employer Lookup** window is displayed.

2 Click **Add New**. The **Add New Employer** window is displayed.

3 In the **Employer** field, type the employer name.

4 In the **Phone** field, double-click **<Add New Phone Number>** and type the employer's phone information. Use the drop-down list to select **WK Work**. Click **OK**.

5 In the **Address** field, double-click **<Add Address>** and type the employer's address information. Click **OK**.

6 Click **OK**.

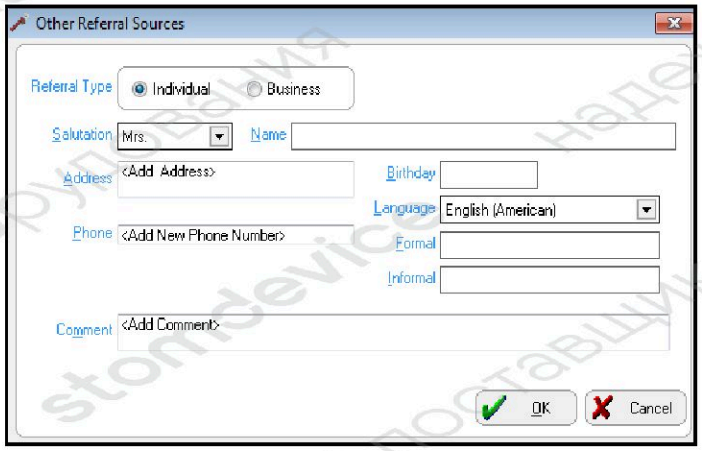
## Adding Referral Sources

Use the other referral sources function to track referrals from outside of your practice, as well as business generated by the telephone directory, a website, a street sign, and so on.

To add referral sources:

1 Click the **Maintenance/Set-up** button and select **Other Referral Sources**. The **CS OrthoTrac Other Referral Lookup** window is displayed.

2 Click **Add New**. The **Other Referral Sources** window is displayed.






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3 From the **Referral Type** options, select **Individual** for a person or **Business** for a source such as the Internet or phone book.

4 In the **Salutation** field, use the drop-down list to select a salutation.

5 Double-click in the **Name** field and type the referral's name.

6 In the **Address** field, double-click **<Add Address>** and type the referral's address.

7 In the **Phone** field, double-click **<Add New Phone Number>** and type the referral phone information.

8 In the **Birthday** field, type the birth date of the referral.

9 In the **Formal** field, type the full first name of the referral; for example, **William**.

10 In the **Informal** field, type the nickname for the referral; for example, **Bill**.

11 Double-click in the **Comment** field and type a comment.

12 Click **OK**.

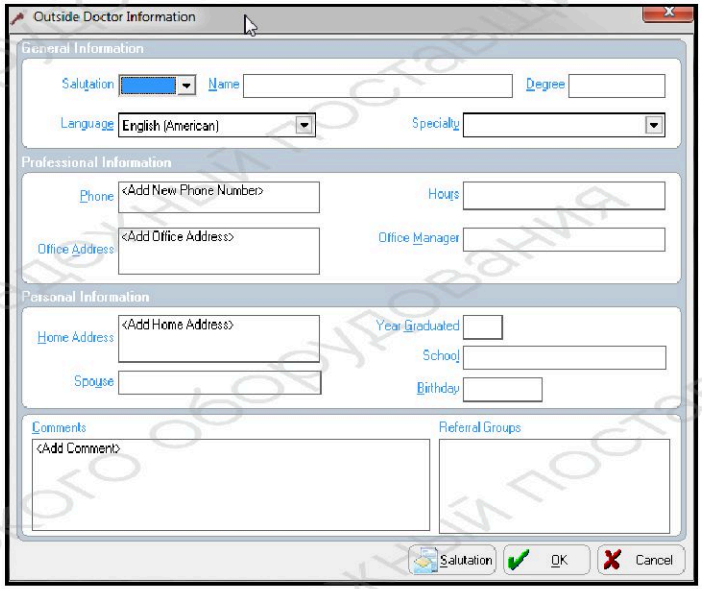
## Adding Outside Doctors

The outside doctor information function enables you to maintain information for doctors with whom you have contact outside of your practice. The software also uses this information to produce various letters and reports.

To add outside doctors:

1 Click the **Maintenance/Set-up** button and select **Outside Doctor Information**. The **CS OrthoTrac Outside Doctor Lookup** window is displayed.

2 Click **Add New**. The **Outside Doctor Information** window is displayed.




3 In the **General Information** section, complete the following fields:

- **Salutation**
- **Name**
- **Degree**
- **Specialty**

4 In the **Professional Information** section, complete the following fields:

- **Phone**
- **Hours**
- **Office Address**
- **Office Manager**

### Note

To change other referral information, select the referral name in the **CS OrthoTrac Other Referral Lookup** window, click **Change**, make your changes, and click **OK**.

### Note

If a doctor has more than one office or if several doctors have the same last name, you must enter an identifier in the **Name** field.



**Maintenance/Set-up**



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**Note**

To change outside doctor information, select the doctor in the **CS OrthoTrac Outside Doctor Lookup** window, click **Change**, make your changes, and click **OK**.

5 In the **Personal Information** section, complete the following fields:

- **Home Address**
- **Year Graduated**
- **School**
- **Spouse**
- **Birthday**

6 In the **Comments** field, double-click **<Add Comment>** and type a comment.

7 Click **OK**.

## Adding Calendar Days Using Schedule Maintenance

**Important**

**Days must be added to the calendar before appointments can be scheduled on those days.**

Most of the settings in the **Schedule Maintenance** window are made when you are initially setting up the schedule; however, you can use this window to add days to the schedule.

To add days to the schedule:

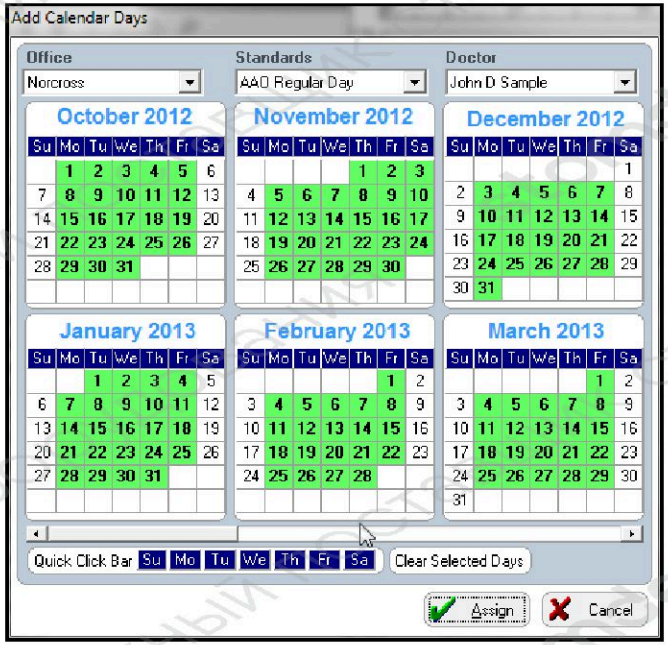


**Maintenance/Set-up**

1 On the main menu, click the **Maintenance/Set-up** button and select **Schedule Maintenance**. The **Schedule Maintenance** window is displayed.

2 Click **Add Days**. The **Add Calendar Days** instruction window is displayed. I

3 Click the window. The calendar is displayed.




4 Select an office, standard, and doctor using the drop-down lists at the top of the window.

You can assign only one combination of location, standard, and doctor at a time.

5 Select the days to which you want the standard to apply:

- To assign a standard to a calendar day, click the day. When a day is selected, it is highlighted in blue.
- To assign a standard to multiple days, click the corresponding letter of the day at the top of the month. For example, to assign a specific standard to every Wednesday in a specific month, click **W** at the top of the month.



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- To assign a standard to a specific day for all months displayed in the **Add Calendar Days** window, click the corresponding button on the Quick Click Bar. For example, to assign a specific standard to all Fridays displayed in the window, click **F** on the Quick Click Bar.

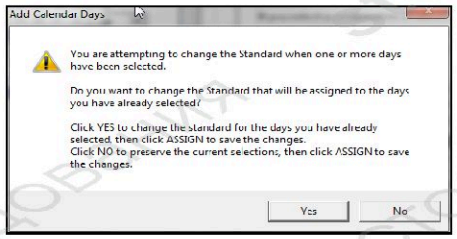
6 Click **Assign**.

7 Repeat this process until all calendar days are added.

## Changing a Day Assignment

If you select a combination of office, standard, and doctor for days on your schedule and you attempt to change one of these options before clicking **Assign**, a message is displayed, alerting you that you did not complete the process.

For example, if you select a standard, office, and doctor for a number of days and try to select another doctor before clicking **Assign**, the following message is displayed.




You have two options:

- Click **Yes** to change the doctor for the days you have selected and then click **Assign**.
- Click **No** to keep your original selections and then click **Assign**.



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## Skill Sharpeners

### Exercise 1—Add a Referral Source

Your office has mailed out flyers promoting your practice and offering a free initial exam. How do you add the flyers as a referral source in the software so you can track the potential business the flyers generate?

To add a referral source:

1 Click the **Maintenance/Set-up** button and select **Other Referral Sources**. The **CS OrthoTrac Other Referral Lookup** window is displayed.

2 Click **Add New**. The **Other Referral Sources** window is displayed.

3 In the **Referral Type** section, click **Business**.

4 In the **Company** field, type **Free Initial Exam Flyers** or something similar.

5 In the **Comment** field, type any additional information; for example, the month the flyers were mailed.

6 Click **OK**. You can now select **Free Initial Exam Flyers** as a referral source when adding new patients or when running referral reports.

### Exercise 2—Add an Insurance Carrier and Attach the Carrier to a Patient

You have added a patient who has an insurance carrier that is not in your database. You must add the carrier to the software and attach the carrier to the patient. How do you do this?

In this example, assume that your office processes claims manually.

To add an insurance carrier to the software and attach the carrier to a patient:

1 In the patient chart, click the **Patient Information** button. The **Patient Information** window is displayed.

2 Double-click the responsible party name in the window at the bottom of the **Patient Information** window. The **Responsible Party Information** window is displayed.

3 Click in the **Carrier** field and click **<Add>.** The **CS OrthoTrac Carrier Lookup** window is displayed.

4 Click **Add New**. The **Carrier Maintenance** window is displayed.

5 In the **Carrier Name** field, type the name of the insurance carrier.

6 In the **Address** field, double-click **<Add Address>** to display the **Edit Address** window and type the address where the claims should be sent.

7 In the **Phone** field, double-click **<Add New Phone Number>** to display the **Add Phone Number** window and type the carrier phone number, extension, and type.

8 In the **Contact** field, type the name of the contact person at the insurance company.



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9 In the **Release** field, select either **Signature on File** or **None** to indicate whether authority was granted to release patient dental information to the insurance company.

10 In the **Assign** field, select an option to indicate the assignment of benefits.

11 In the **Employer** field, do the following:

- Press Enter or double-click to display the **CS OrthoTrac Employer Lookup** window.
- Type the employer name in the top field and press Enter.
  - If the employer is already in the list, the name is selected. Click **OK** to attach the employer to the carrier.
  - If the employer is not in the list, click **Add New** to display the **Add New Employer** window and complete the information.

12 In the **Deductible** field, enter the amount the patient must pay.

13 In the **Max Amount** field, enter the dollar amount of the patient's maximum benefit (yearly or lifetime) minus the deductible.

14 In the **Group ID** field, enter the unique identification number for this insurance carrier/employer.

15 In the **Percent** field, enter the amount that the carrier pays; for example, 50%.

16 In the **Maximum Age** field, enter the maximum age of a patient for whom the insurance provides orthodontic benefits.

17 In the **Continuation of Treatment** field, select an option from the drop-down list. When generating continuation of treatment claims, the date for the **Description of Service** is determined by this setting.

You can select from the following options:

- **None**–Carrier does not require continuation of treatment claims.
- **Last Day of Month**–Carrier accepts the last day of the month.
- **Banding Date**–Carrier requires the date of banding.
- **Range**–Carrier accepts the date you select or the first day of the month. This is the default option.
- **Specific**–Carrier requires the date on which the patient is seen in the office.

18 In the **Frequency** field, select an option from the drop-down list to indicate how often an insurance carrier requires a continuation of treatment claim to be filed.

19 Use the **Cont Tx Override** field for carriers that require their own code for continuation of treatment; otherwise, leave this field blank.

20 In the **Comments** field, double-click **<Add Comment>** to display the **Add Comment** window and type additional information about a carrier, if necessary.

21 Click **OK** to close the **Carrier Maintenance** window.

22 Click **OK** to close the **CS OrthoTrac Carrier Lookup** window.



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23 If the carrier you just added has assigned an Insured ID number to the patient, click in the **Carrier** field and select the name of the carrier. The **Insurance Carrier** window is displayed.

24 Type the Insured ID number in the field and click **OK**.

25 Click **OK** to close the **Responsible Party Information** window and add the carrier to the patient chart.

26 Click **OK** to close the **Patient Information** window.

27 Click the **Patient Lookup** button to close the patient chart and select another patient.



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Lesson 3

# Adding Patients

This lesson includes:


- Adding a New Patient on page 17
- Using Quick Add on page 21


## Adding a New Patient

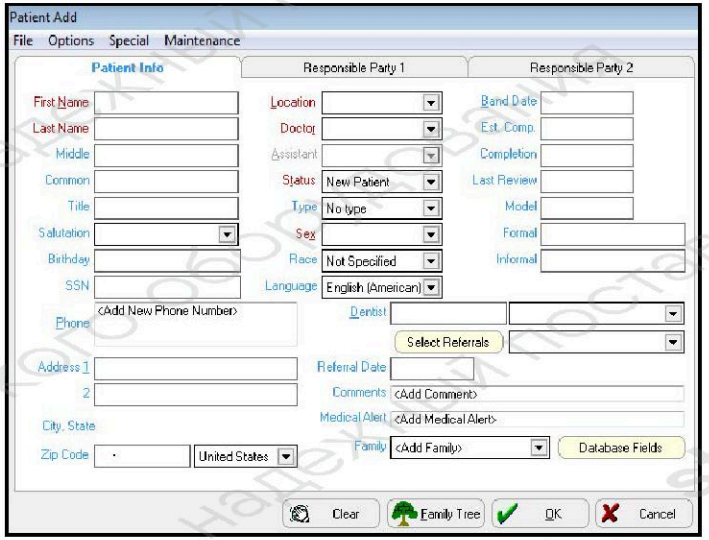
When adding a new patient, add information about the patient and the responsible party, if the patient is not self-responsible. The fields displayed in red must be completed to add the record to the database.

### Adding Patient Information

To add a patient:

1 Click the **Open Patient Chart** button. The **CS OrthoTrac Patient Lookup** window is displayed.

2 Search for the name of the person you want to add, in case he or she is already in the database. If you do not find the name using the lookup window, click **Add New**. The **Patient Add** window is displayed.






**Open Patient Chart**

3 In the column on the left, complete as many fields as you can. Press Tab to move from field to field.

4 In the center column, use the drop-down lists to populate the fields.

Depending on your office setup, some fields may not be active. You must complete the **Location**, **Status**, and **Sex** fields, displayed in red.

5 In the column on the right, complete the following fields:

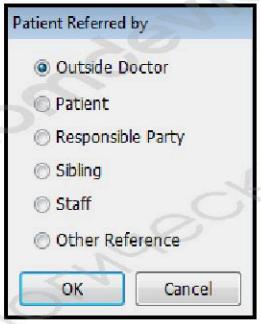
- **Dentist**–Type the name of the patient's dentist in the **Dentist** field or use the drop-down list to select a name.



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When you press Tab to move to another field, the software asks if you want to assign the dentist as a referral source. If not, click **Select Referrals**. The **Patient Referred by** window is displayed.




**Tip**

When the referral is a sibling that is an existing patient, select **Patient** instead of **Sibling**. Then select the name from the patient record.

When you select the referral source, a lookup window is displayed, which enables you to search for the name of the referral. Select the name of the referral source. If the name is not on the list, click **Add New** to add the name.

- **Referral Date**–Enter the referral date in mm/dd/yy format.
- **Comments**–Click **<Add Comment>**. The **Add Comment** window is displayed.

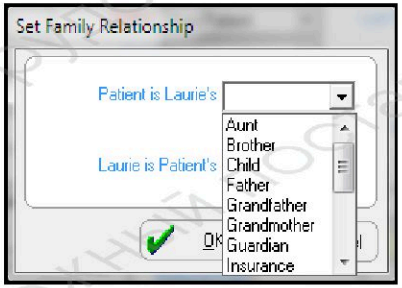
  Enter your comment and select whether you want to acknowledge the comment after opening the patient's chart. Click **OK** to save the comment, or click **Add** to enter another comment. The comment is displayed with a blue background on the patient chart.

- **Medical Alert**–Click **<Add Medical Alert>**. The **Add Medical Alert** window is displayed.

  Enter the medical alert and select whether you want to acknowledge the comment after opening the patient's chart. Click **OK** to save the alert and close the window, or click **Add** to enter another medical alert. The comment is displayed with a red background on the patient chart.

- **Family**–Use the drop-down list and select **Add Family**. The **CS OrthoTrac Relative Lookup** window is displayed.

  Select the name of the relative you want to add and click **OK**. The **Set Family Relationship** window is displayed.




Select options from the drop-down lists to indicate how the two are related. Click **OK**.

**OR**

If the name is not on the list, click **Add New**.



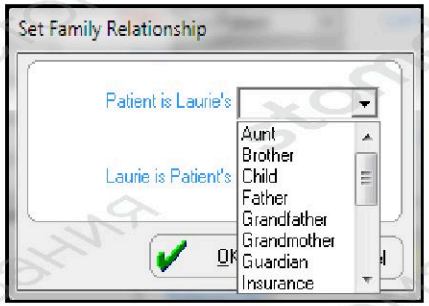
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The **Add Relative** window is displayed.




Complete the fields in the **Add Relative** window and click **OK**. The **Set Family Relationship** window is displayed.



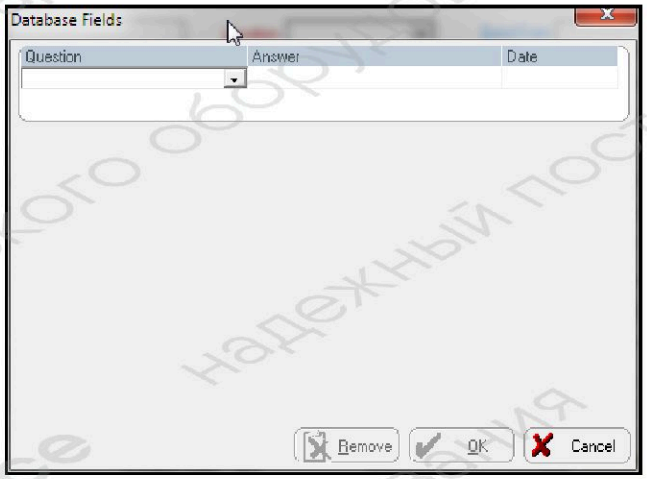

Select options from the drop-down lists to indicate how the two are related. Click **OK**.

## Using the Database Fields Function

The database fields function enables you to track patient-related information that is not already tracked by the software, such as an account balance, a hobby, the school attended, demographic information, and so on. This information is reported in contact experts.

To add patient interests to the patient chart:

1 Click **Database Fields**. The **Database Fields** window is displayed.




2 Select the question type from the drop-down list in the **Question** field and press Tab. The **Answer** field becomes active.

3 Use the drop-down list in the **Answer** field to select an answer, or select **<Add New Option>** to enter a new answer. The **Add Options** window is displayed.

4 Type an answer in the field and click **Next** to enter additional answers, or click **OK** to add the answer and close the window.

### Note

Adding a relative does not make the family member a patient, but adds him or her to the software for reference purposes.



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5 Scroll to the bottom of the drop-down list to select the answer you just added and press Tab. The **Date** field is populated with the current date, and you can select a new question, if necessary.

6 Click **OK**.

### Using the Clear Button

If you have entered patient information in error, click **Clear** to remove *all* of the information you have entered in the window.

### Using the Family Tree Button

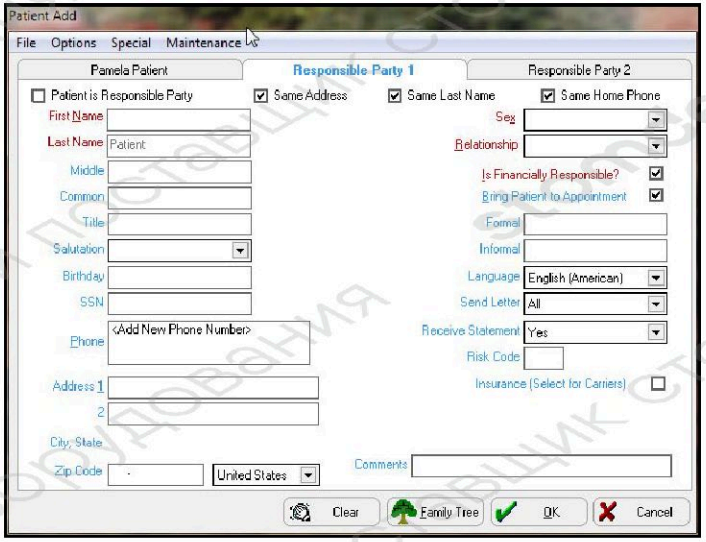
Click **Family Tree** to open the **Show Family Tree** window. This is a view-only window that enables you to see all of the family members you have associated with this patient.

## Adding Responsible Party Information

When you add a new patient, you must add at least one responsible party. You can add multiple responsible parties, if necessary.

To add responsible party information:

1 After completing the **Patient** tab, click the **Responsible Party 1** tab or press Tab. The **Patient Add– Responsible Party 1** window is displayed.




2 Type information in the fields and use the drop-down lists to select the demographic and financial information for the responsible party.

- **Patient is Responsible Party**–Select this option if the patient will be self-responsible. This fills in the patient information in the responsible party fields.
- **Same Address**–Deselect this option if the responsible party has a different address than the patient.
- **Same Last Name**–Deselect this option if the responsible party has a different last name.
- **Same Home Phone**–Deselect this option if the responsible party has a different home phone number.
- **Insurance**–Select from a list of insurance carriers for the responsible party. If you enter more than one insurance carrier, click **<Rank Ins. Co.>** to designate a primary and secondary company.



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3 If necessary, click the **Responsible Party 2** tab to add a second responsible party. Select **Options > Add Another Responsible Party Page** to add up to two additional pages.

4 Click **OK**. If you have configured the software so you can assign patient numbers manually, the **Next Patient Number** window is displayed. Enter the next patient number and click **OK**. The patient chart is displayed.

If you have configured the software to assign a patient number automatically, the patient chart is displayed.

## Using Quick Add

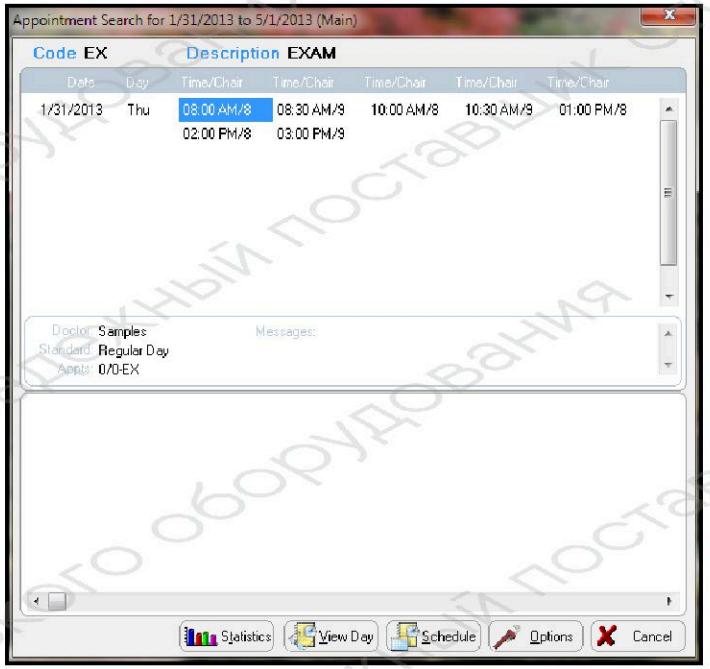
The quick add feature is the most common method of adding a patient. Available on the main menu, quick add is typically used to set up appointments for new patients who are on the phone.

The search method used by the quick add feature depends on the method you have selected to perform searches when scheduling.

To add a patient using the quick add feature:

1 On the main menu, click the **Quick Add** button. If you have more than one location, the **Schedule Office** window is displayed.

2 Select the appropriate office location. The **Appointment Search** window is displayed.




3 Select an available appointment time from the grid by clicking it once.

4 Click one of the buttons at the bottom of the window:

- **Statistics**
- **View Day**
- **Schedule**
- **Options**

5 In the **Patient Add** window, type the patient information, pressing Tab to move from field to field.

**Tip**

Use the data in the center of the window and the bar graph at the bottom of the window to gauge how busy your office is on a particular day.



**Quick Add**



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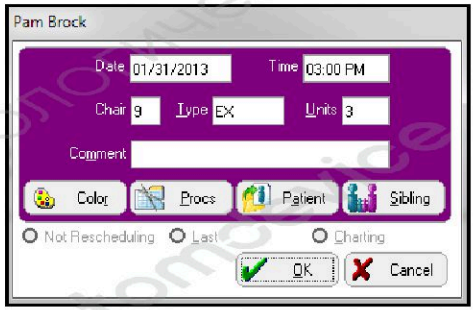
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6 Click **OK**. The **Appointment Details** window is displayed.

**OR**

If the **CS OrthoTrac Patient Lookup** window is displayed, type the name of the new patient to confirm that the patient is not already in the software. If the patient is not in the list, click **Add New** to display the **Patient Add** window and enter the patient information, pressing Tab to move from field to field.

Click **OK**. The **Appointment Details** window is displayed.




7 Click **OK**.



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## Skill Sharpener

### Exercise 1–Add a New Patient

A new patient comes to your office. You want to create a record and add the necessary information about the patient.

To add a patient:

1 Click the **Open Patient Chart** button. The **CS OrthoTrac Patient Lookup** window is displayed.

2 Search for the name of the person you want to add, in case he or she is already in the database. If you do not find the name using the lookup window, click **Add New**. The **Patient Add** window is displayed.

3 In the column on the left, complete as many patient demographic fields as you can. Press Tab to move from field to field.

4 In the center column, use the drop-down lists to populate the fields.

5 In the column on the right, complete the following fields:

- **Dentist**–Type the name or use the drop-down list to select a dentist's name.
- **Referral Date**–Enter the referral date in mm/dd/yy format.
- **Comments**–Click **<Add Comment>** or press Enter when **<Add Comment>** is selected. The **Add Comment** window is displayed.
- **Medical Alert**–Click **<Add Medical Alert>**. The **Add Medical Alert** window is displayed.
- **Family**–Use the drop-down list and select **Add Family**. The **CS OrthoTrac Relative Lookup** window is displayed.

Select the name of the relative you want to add and click **OK**. The **Set Family Relationship** window is displayed.

Select options from the drop-down lists to indicate how the two are related. Click **OK**.

**OR**

If the name is not on the list, click **Add New**.

The **Add Relative** window is displayed.

Complete the fields in the **Add Relative** window and click **OK**. The **Set Family Relationship** window is displayed.

Select options from the drop-down lists to indicate how the two are related. Click **OK**.



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Lesson 4

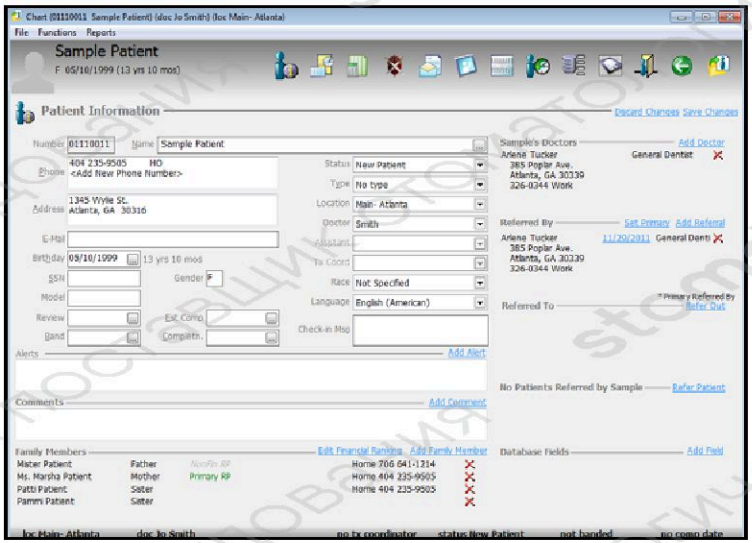
# Changing Patient Information

This lesson includes:


- Updating Patient Information on page 25
- Ranking Responsible Parties on page 25
- Adding Responsible Parties and Linking Relatives on page 26


## Updating Patient Information

To access the **Patient Information** window, on the main menu, click the **Open Patient Chart** button, or in a patient's chart, click the **Patient Information** button.




To add details to the **Patient Information** window:

1. To update information, click in a field and type the new information or by using a drop-down list to select an option.
2. Use the **Family Members** panel at the bottom of the window to:
   - Add or delete responsible parties and relatives.
   - View and update responsible party and relative information.
3. Click **OK**.



**Open Patient Chart**



**Patient Information**

## Ranking Responsible Parties

When you add a patient to the software, you must add at least one responsible party for that patient, but you can add several, if necessary. The software ranks the responsible parties in the order that you enter them; for example, the first person you enter is 1, the second is 2, and so on. To change the order of responsible parties, use the ranking feature.



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To rank responsible parties:

1 In the patient chart, click the **Patient Information** button to display the **Patient Information** window. The **Family Members** section is displayed.




2 Click **Edit Financial Ranking**. The **Edit Financial Ranking** window is displayed.




3 Click a name and select from the drop-down list.

4 Click **OK**.

## Adding Responsible Parties and Linking Relatives

If you need to add additional responsible parties to a patient chart, link family members, or add family members for reference or reporting purposes, click **Add Family Member**.

## Adding a Responsible Party

To add a responsible party:

1 In the patient chart, click the **Patient Information** button to display the **Patient Information** window.

2 Click **Add Family Member**. The **Add Family Member** window is displayed.

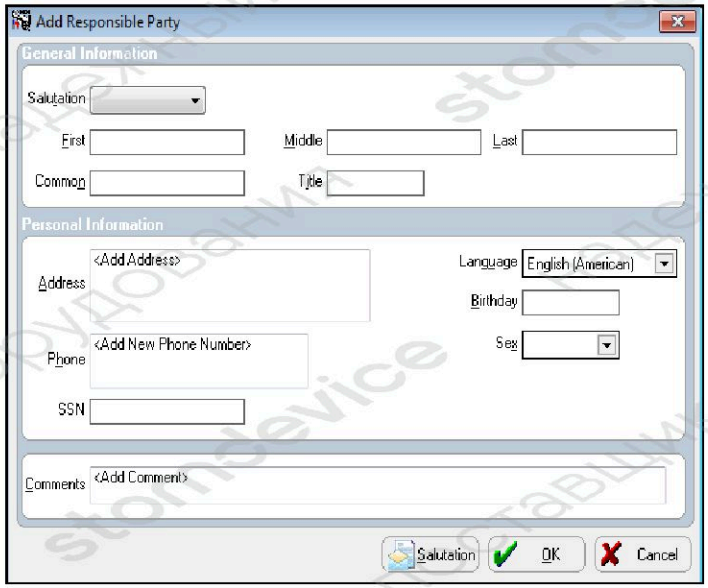
3 Select **Responsible Party** and click **OK**. The **CS OrthoTrac Responsible Party Lookup** window is displayed.

4 Search the list for the name you want to add and click **OK**.

**OR**

If the name is not in the list, click **Add New**.

The **Add Responsible Party** window is displayed.





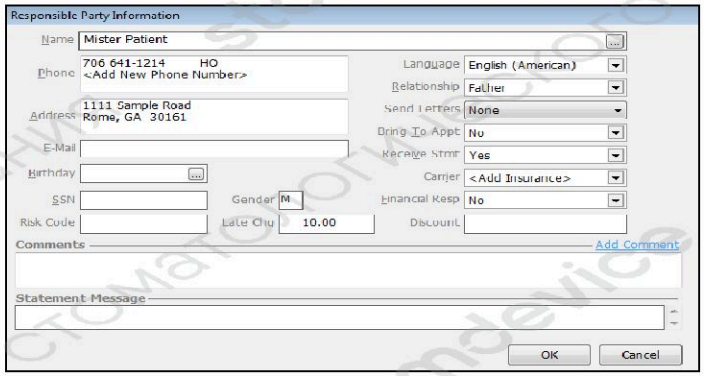

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5 Complete the information in the window.

6 To enter a customized salutation, click **Salutation**. The **Custom Salutations** window is displayed. Enter a **Formal** and **Informal** salutation in the fields. Click **OK**.

7 Click **OK**. The **Responsible Party Information** window is displayed.




8 Select the **Relationship** for the family member. The **Financially Resp** field defaults to **No**, as long as one responsible party is already financially responsible.

Use the buttons at the bottom of the window to enter specific information for this responsible party.

9 Click **OK**.

## Adding a Relative

To add a relative:

1 In the patient chart, click the **Patient Information** button to display the **Patient Information** window.

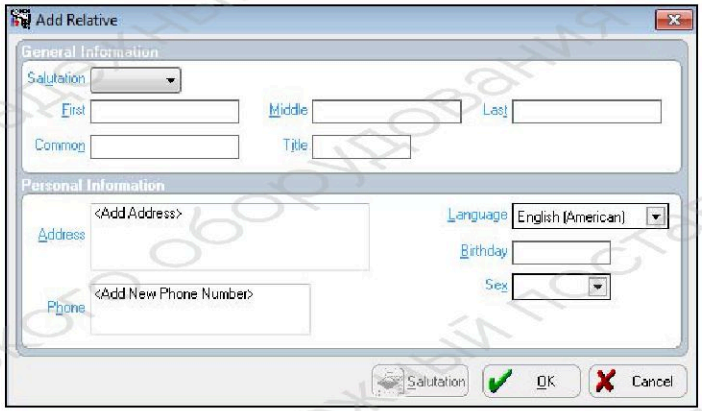
2 Click **Add Family Member**. The **Add Family Member** window is displayed.

3 Select **Relative** and click **OK**. The **CS OrthoTrac Relative Lookup** window is displayed.

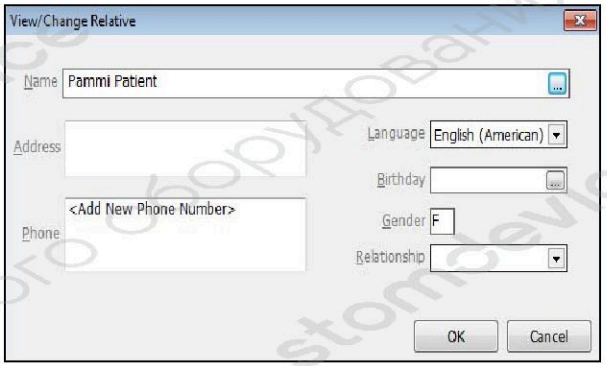
4 Search the list for the name you want to add and click **OK**.

**OR**

If the name is not in the list, click **Add New**. The **Add Relative** window is displayed.




5 Complete the fields in the window and click **OK**. The **View/Change Relative** window is displayed.




### Note

If you need to add additional insurance companies to a patient chart or need to rank insurance companies, select the company or **<Rank Ins. Co.>** from the **Carrier** field.



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**Note**

Adding a family member using this method does not make the family member a patient, but adds him or her to the software for reference purposes.

6 Use the drop-down list in the **Relationship** field to select the relationship for this relative.

7 Click **OK**.

## Viewing/Editing Responsible Party or Relative Information

To view or edit the personal information for a responsible party or relative:

1 Click the name of the person in the **Family Members** panel whose information you want to view.

2 Edit or view the information, and click **OK**.

## Adding Referrals

The **Patient Referrals** window contains information about the patient's doctor, the referring doctor, doctors to whom the patient has been referred, and patients that have been referred to your practice by the patient.

To enter referral information for a patient:

1 Click **Add Referral**. The **Patient Referral by** window is displayed.

2 Select the type of referral and click **OK**. Depending on the type of referral you select, a lookup window is displayed, enabling you to select the referral source from the list. If the referral is not on the list, you can add the referral.

3 Click **OK**.

## Using the Database Button

If you need to view or edit the patient's interests—for example, schools, sports, or hobbies—in the **Database Fields** area, click **Add Field**. The **Database Fields** section is displayed.



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## Skill Sharpeners

### Exercise 1—Add a Family Member

You want to add information about a patient's family member for reference purposes.

To add a family member:

1 In the patient's chart, click the **Patient Information** button. The **Patient Information** window is displayed.

2 Click **Add Family Member**. The **Add Family Member** window is displayed.

3 Click **Relative** and **OK**. The **CS OrthoTrac Family Lookup** window is displayed.

4 Click **Add New**. The **Add Relative** window is displayed.

5 Type the name, address, zip code, and relationship and click **OK**.

6 Click **OK**.

### Exercise 2—Add a Responsible Party

A patient's mother, who has been the responsible party, calls your office to say that she will no longer be paying for her son's treatment and that the child's grandmother is taking over the payments. How do you add the patient's grandmother as a responsible party?

To add a responsible party to a patient record:

1 In the patient chart, click the **Patient Information** button. The **Patient Information** window is displayed.

2 Click **Add Family Member**. The **Add Family Member** window is displayed.

3 Select **Responsible Party** and click **OK**. The **CS OrthoTrac Responsible Party Lookup** window is displayed.

4 Search the list for the name you want to add and click **OK**. If the name is not on the list, click **Add New**. The **Add Responsible Party** window is displayed.

5 Complete the information in the window. Click **OK**. The **Responsible Party Information** window is displayed.

6 In the **Relationship** field, select the responsible party's relationship to the patient.

7 In the **Send Letters** field, select the types of letters that should be sent to this responsible party.

8 In the **Recv Stmt** field, select **Yes**, so this responsible party receives a statement.

9 In the **Carrier** field, select the responsible party's insurance carrier, if applicable.

10 In the **Financial Resp** field, select **Yes**.

11 Complete the remaining fields (**Risk Code**, **Late Chg**, **Discount**) if your office uses these features.

12 Use the buttons at the bottom of the window to enter additional information for this responsible party.

13 Click **OK**.



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### Exercise 3—Change the Address of the Responsible Party

A patient's mother calls to tell you that she has had a change of address. The woman is the responsible party for her son, and the change of address affects her son as well. What do you need to do to update the responsible party information?

To change the information for a responsible party:

1 On the main menu, click the **Open Patient Chart** button. The **CS OrthoTrac Patient Lookup** window is displayed.

2 Type the patient's name and click **OK**. The patient's name is selected, and the chart is displayed.

3 In the **Family Members** panel at the bottom of the window, click the responsible party name. The **Responsible Party Information** window is displayed.

4 Double-click in the **Address** field. The **Edit Address** window is displayed, and the existing address information is selected.

5 Type the new information and click **OK**. The **Change Address** message window is displayed.

6 Click **Yes** and **OK**.



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Lesson 5

# Scheduling Appointments

This lesson includes:


- Scheduling Appointments from the Patient Chart on page 31
- Scheduling Appointments from the Main Menu on page 33
- Scheduling Sibling Appointments on page 34
- Canceling an Appointment on page 34
- Changing a Patient Appointment Using the Clipboard on page 34
- Using Cut and Paste Scheduling on page 36
- Scheduling Recalls on page 37
- Using Scheduling Reports on page 38


## Scheduling Appointments from the Patient Chart

To schedule an appointment from a patient's chart:

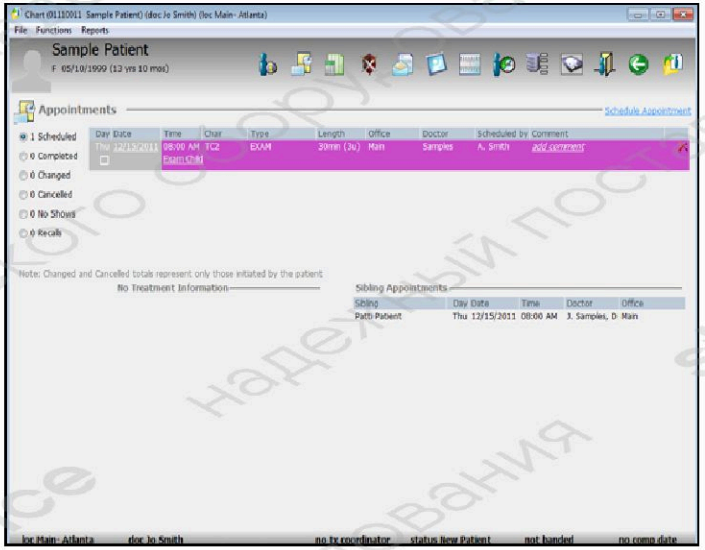
1 Click the **Open Patient Chart** button. The **CS OrthoTrac Patient Lookup** window is displayed.

2 Select a patient and click **OK**.

3 Click the **Schedule Appointment** button. The **Appointment Summary** window is displayed.



**Schedule Appointment**





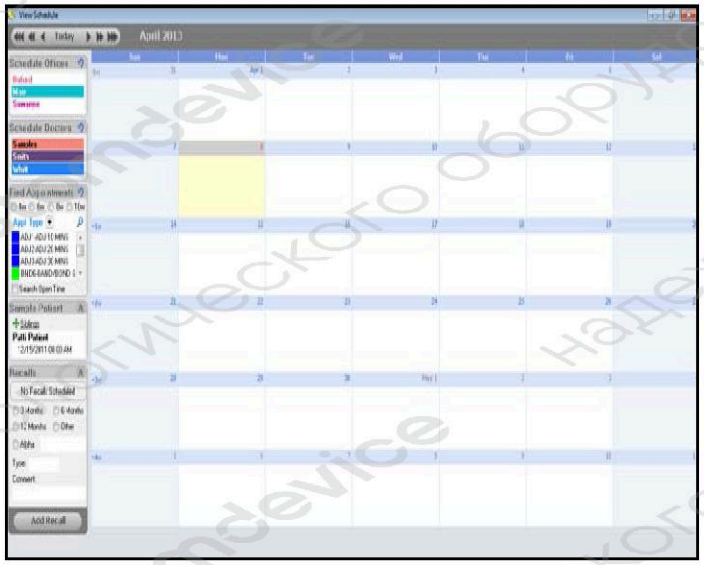

**Open Patient Chart**



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4 Click **Schedule Appointment**. The **View Schedule** window is displayed.



5 For practices with multiple locations, select the offices you want to display from the **Schedule Offices** standard.

6 Select the doctors who are available to see the patient from the **Schedule Doctors** standard.

7 To include all available appointment times in your search, skip to step #8. Otherwise, select one of the following time intervals from the **Find Appointments** standard:

- **4w**–Display appointments that are available four weeks from now.
- **6w**–Display appointments that are available six weeks from now.
- **8w**–Display appointments that are available eight weeks from now.
- **10w**–Display appointments that are available ten weeks from now.

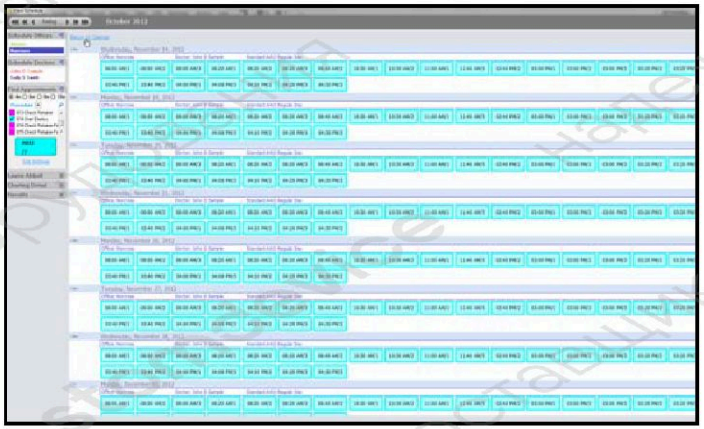
8 Select an appointment type or procedure code from the **Find Appointments** standard. A list of available appointment times is displayed.

9 To refine your selections, click **Edit Settings**. The **Searching for** window is displayed.

10 Select from these fields:

- **Search these dates**
- **Between these times**
- **On these days**
- **In these chairs**
- **Search open slots**

11 Click **Start Searching**. A list of available times is displayed based on the criteria.

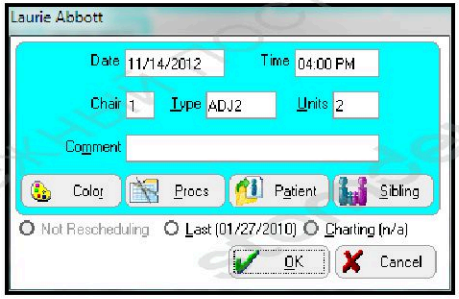




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12 Click an appointment time.




The appointment information is displayed, including the patient name, the date, time, chair, type, time units, and any associated comments. In this window, you can:

- Select the color of the appointment
- Select the procedures associated with the appointment
- Access the **CS OrthoTrac Patient Lookup** window
- View sibling appointments

## Confirming Appointments

To confirm a patient appointment:

1 In a patient chart, select **Functions > Schedule Appointment**. The **Appointment Summary** view is displayed.

2 Click next to the appointment you want to confirm. The **Confirm Appointment** window is displayed.

3 After calling the patient to confirm the appointment, click **<click to add note>**. Type a comment in the window and press Enter. The **Confirm Appointment** window closes.

4 If you need to change a confirmed appointment back to unconfirmed, click next to the appointment again to display the **Confirm Appointment** window. Deselect **Mark Appointment as Confirmed**.

## Scheduling Appointments from the Main Menu

To schedule an appointment from the main menu:

1 Click the **Schedule Appointment** button. The **View Schedule** window is displayed.

2 You can use the panes to the left of the calendar to find an appointment time based on specific criteria. In this window, the following panes are available:

- **Schedule Offices**
- **Schedule Doctors**
- **Find Appointments**

**OR**

You can click a doctor's name on a specific date on the calendar and access the schedule book in View or Zoom mode.

3 Click an appointment in the schedule book. The **CS OrthoTrac Patient Lookup** window is displayed.

4 Select a patient and click **OK**. The appointment information is displayed, including the name, date, time, chair, type, time units, and any comments.

In this window, you can:

- Select the color of the appointment
- Select the procedures associated with this appointment



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- Access the **CS OrthoTrac Patient Lookup** window
- View sibling appointments

5 Click **OK**. The appointment is scheduled.

## Scheduling Sibling Appointments

To schedule an appointment for a sibling without opening the sibling's chart:

1 Schedule an appointment for the first patient using the View or Zoom view.

2 While still in the **Schedule** window in the patient chart, click an appointment type or chair. The **Appointment Details** window is displayed.

3 Click **Sibling**. The **Sibling Appointments** window is displayed.

**Note:** To use the **Sibling** button, siblings must first be linked in the **Patient Info** section of the patient chart.

4 Select the sibling and click **OK**. The sibling name is displayed in the **Appointment Details** window, along with the appointment type you selected.

5 Click **OK**.

## Canceling an Appointment



**Schedule Appointment**

To cancel a patient appointment:

1 In the patient chart, click the **Schedule Appointment** button. The **Appointment Summary** window is displayed.

2 In the **Appointments** section, click the red X next to the appointment you want to delete. The **Cancel Appointment** window is displayed.

3 Select an option button to identify who is cancelling the appointment.

4 Deselect **Copy Appointment to Clipboard** and click **OK**.

## Changing a Patient Appointment Using the Clipboard

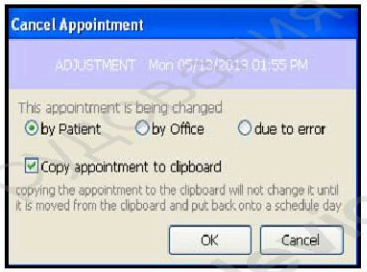
To change a patient's appointment, you can click-and-drag the appointment to the clipboard. There are two ways to move appointments to the clipboard:

- In a patient chart
- In the View or Zoom display of the schedule

To change a patient appointment in the patient chart using the clipboard:

1 In the patient chart, click **Schedule Appointment**. The **Appointment Summary** window is displayed.

2 In the **Appointments** section, click the red **X** next to the appointment you want to change. The **Cancel Appointment** window is displayed.





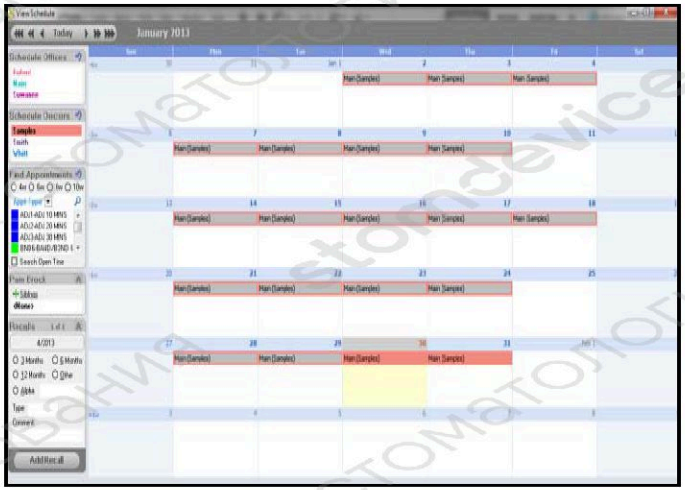

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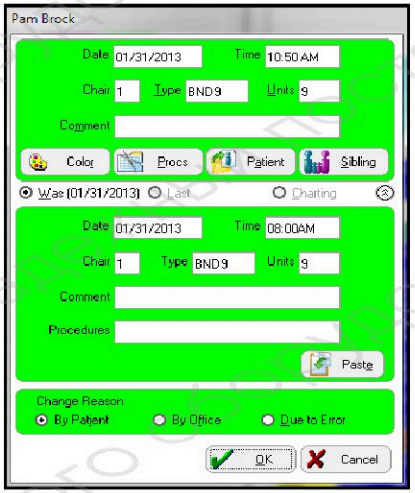
If you have selected the **Default Clipboard Open** option in **Schedule Maintenance**, the **Copy Appointment to Clipboard** option is selected, and the appointment is placed on the clipboard, or you can select **Copy Appointment to Clipboard**.

3 Select an option to identify why the change is being made and click **OK**. The **Schedule Calendar** is displayed.

4 Click the name of the doctor and the date. The View or Zoom mode is displayed with the appointment information on the clipboard.



5 Click-and-drag the appointment information from the clipboard to the new appointment time and chair. The **Appointment Details** window is displayed.




The **Was** option is automatically selected, and the window shows details of the original appointment you are changing.

6 Click **Paste**. The appointment information is transferred into the new appointment.

7 Click **OK**.

To change an appointment from the View or Zoom display:



**Schedule Appointment**

1 Click the **Schedule Appointment** button. The **View Schedule** window is displayed.

2 Select the location, doctor, and specific day. The View or Zoom view of the day is displayed.

3 Find the appointment you want to change. Click-and-drag the appointment to the clipboard. The appointment you are changing is displayed in gray.



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**Note**

If the appointment type in the upper section of the **Appointment Details** window differs from the appointment type in the lower section, you must have Override Pre-Block security permission to transfer information.

4 Select the new day in the schedule. Click-and-drag the appointment from the clipboard into the new appointment time. The **Appointment Details** window is displayed.

The **Was** option is automatically selected, and the window shows details of the original appointment.

5 Select a reason to indicate why the appointment is being changed.

6 Click **Paste**. The appointment information is transferred into the new appointment.

If the appointment change is within the same day, you can drag the appointment directly from the current time into the new time and chair.

## Using Cut and Paste Scheduling

The **Appointment Details** window enables you to quickly transfer information from an existing appointment to the appointment you are scheduling by using a feature called cut-and-paste scheduling.

Information can be transferred from the patient's last missed appointment, from the patient's next charting appointment, from the treatment plan, or when changing an appointment.

### Transferring Information from a Missed Appointment

To transfer information from a patient's most recent missed appointment:

1 Click an appointment slot in the **Schedule** window in the View or Zoom mode.

2 In the patient's **Appointment Details** window, click **Last**.

3 Click **Paste**. The appointment information is transferred to the new appointment.

4 Make any changes to the new appointment information.

5 Click **OK**.

### Transferring Information from the Treatment Card

To transfer information from the **Next Appointment** section of the treatment card:

1 Click **Schedule Appointment**. The **View Schedule** window is displayed.

2 Select an appointment time. The appointment information is displayed, including the name, date, time, chair, type, time units, and any comments.

3 Select the **Charting** option. The window expands, showing the details of the **Next Appointment** section of the patient's treatment card.

4 Click **Paste**. The appointment information is transferred to the new appointment.

5 Make any necessary changes to the new appointment information.

6 Click **OK** to schedule the appointment. The software asks if you would like to clear this information from Charting. Click **No** if you would like to save the next appointment information in Charting to view at the next visit.

7 Click **Close** twice.



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## Transferring Information from a Treatment Plan

To transfer appointment information for the next treatment plan appointment:

1 Begin scheduling an appointment by clicking **Schedule Appointment**. The **View Schedule** window is displayed.

2 In the **TxPlan Detail** standard, the procedure information for the next appointment is displayed. Click **Find Appointment**. The **View Schedule** window displays a list of appointment times corresponding to the procedure type. Select an appointment time. The appointment information is displayed, including the name, date, time, chair, type, time units, and any comments.

3 Select the **TxPlan** option. The window expands, showing the details of the **Next Appointment** section of the patient's treatment card.

4 Click **Paste**.

5 Click **OK**.

6 Click **Close** twice.

## Rescheduling Two Appointments

To reschedule and transfer information from two appointments:

1 Cancel both appointments; then open the **Schedule** window in View or Zoom mode.

2 To reschedule the first appointment, click **Last**. See "Transferring Information from a Missed Appointment" on page 36 for more information.

3 To reschedule the second appointment, click **Was**. See "Changing a Patient Appointment Using the Clipboard" on page 34 for more information.

## Scheduling Recalls

The recall feature enables you to track patients who are not due back in your office for several months or a year. Recalls are also used for patients who need the first available appointment or patients who missed an appointment and need to reschedule.

**Note**

Recalls can be scheduled only from the patient chart and can be automatically scheduled when you run the NoShow report.

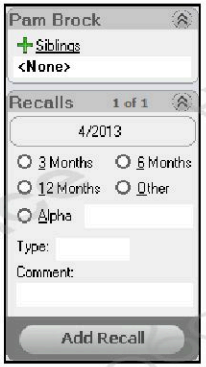
Recall appointments are not real appointments; you do not see them on your schedule appointment book. The recall function lets you create a computerized tickler file to help you keep track of your recall patients. Then you can produce a list, labels, or recall cards for a specific month so that you can contact your recall patients.

To schedule a patient recall:

1 In the patient chart, click the **Schedule Appointment** button and then click **Schedule Appointment**. The **View Schedule** window is displayed, showing the **Recalls** standard.



**Schedule Appointment**




2 Select a time option or **Alpha**. Enter a type and a comment, and then click **Add Recall**.

The **Alpha** and **Type** fields allow up to four alphanumeric characters; the **Comment** field is limited to 30 characters.

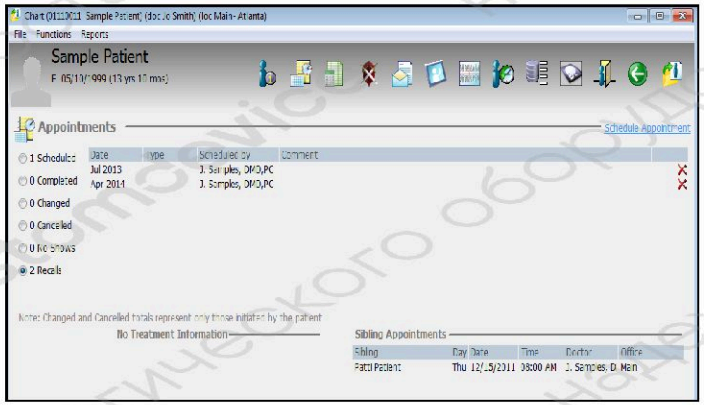
3 Close the **View Schedule** window.



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4 Select the **Recalls** option. The recall appointments are listed.




## Using Scheduling Reports

Several reports help you track scheduled appointments. The following scheduling reports are available:

- Available Appointments
- Scheduled Appointments
- Daily Schedule–List Format and Schedule Format
- Daily Collections
- NoShow
- Future Procedures
- Recall reports (Recall Labels, Recall List, Recall Cards)

### Available Appointments

The Available Appointments report generates a list of appointment types available on a day or range of days and includes the doctor's name and office. You can search for all appointment types or specific appointment types, and you can run the report for all offices or a specific office. This report enables you to monitor productivity from day to day and displays the openings in your schedule.

### Scheduled Appointments

The Scheduled Appointments report generates a list of appointments for a day or a range of days. Included on the report are the appointment date, appointment type, chair, units, patient name, type, and status. The report can be filtered for all appointment types or specific appointment types.

### Daily Schedule–List Format

The List Format report generates a list of patients who have an appointment on the date entered. The List Format report prints by office, with the doctor's name printed in the upper-right section. You can print a report for one date or a range of dates and can sort the report by patient number, patient name, or appointment time. You can also have the patient number or appointment time print in the first column of the report. Messages and comments are printed at the bottom of the report, as well as indicators for progress reviews due, and whether the appointment was confirmed.

You can also print the report for a specific chair, include the model number for the patient, and add the patient's office location to the report.

### Daily Schedule–Schedule Format

The Schedule Format report replicates the grid format of the day for the dates selected. The Schedule Format report prints by office, with the doctor's name printed in the upper-right section. You can print a schedule for one date or a range of dates and include the patient's first name, common name, snapshot, phone number, and messages. You can also include the appointment type or primary procedure type. The schedule can be printed in color.



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## Daily Collections

The Daily Collections report generates a list of patients scheduled on a particular date or range of dates with their balances. You can include all accounts, all non-zero, credit balance, and 30+, 60+, or 90+ days on the report. You should run this report before patients arrive.

## NoShow Report

The NoShow report generates a list of patients who did not show up for their appointments. To archive schedule days from the calendar, the report should be run for each day, at the end of the day, or on the morning of the next day. The report archives no-shows and puts no-show patients on the recall list.

### Printing the NoShow Report and Archiving the Day

When you print the NoShow report, the patient's appointment is changed from **Scheduled** to **No Show** in the **Appointment Summary** window, schedule statistics are updated, and the day is archived.

To print the NoShow report and archive the day:

1. At the end of the day, select **Reports > Schedule > NoShow Report**. The **No-Show Report** window is displayed.
2. Type the date for which you want to run the report and select the report options.
3. Click **Print**. The software displays a message, asking if you want to print days with zero no-shows. Click **Yes** or **No**. The **No-Show Report** window is displayed.
4. Select from the following options:
   - **Post No-Show Letters**–Select this option to specify a no-show letter to post or to cancel posting the letter for each patient.
   - **Archive Patient Flow Totals**–Ensure that this option is selected so patient flow totals are updated.
   - **Put Patients on "NSHW" Recall List**–Select this option to store the patient information on the NSHW Alpha Recall list.
5. Click **Yes** to archive the selected dates and finish running the report.
6. Select the No-Show letter you want to post for each patient. To send a recall letter, select **No-Show-1**; to send a stronger letter, select **No-Show-2**. If you do not want to post a letter for a particular patient, click **Cancel**.
7. Click **OK**.

**Note**

You cannot run the NoShow report if you have future appointments remaining on the schedule for the day.

## Future Procedures

The Future Procedures report generates a list of procedures that are linked to appointment codes for future days on the schedule. You can include all procedures or selected procedures, and sort the list by procedure or in chronological order.

You can use this report to keep assistants and doctors informed about upcoming procedures for a single day or future date. The report includes a summary page that enables the doctor to track the totals on certain procedures for a specific period of time. You can also use this report to help in maintaining inventory, as you can determine how many bandings, appliance deliveries, and so on, are scheduled for the future and order supplies accordingly.



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## Recall Reports

Recall reports enable you to print a list of patients with recalls in a specific month and year or with a specific alpha recall code. You can also print labels or recall cards for these patients.

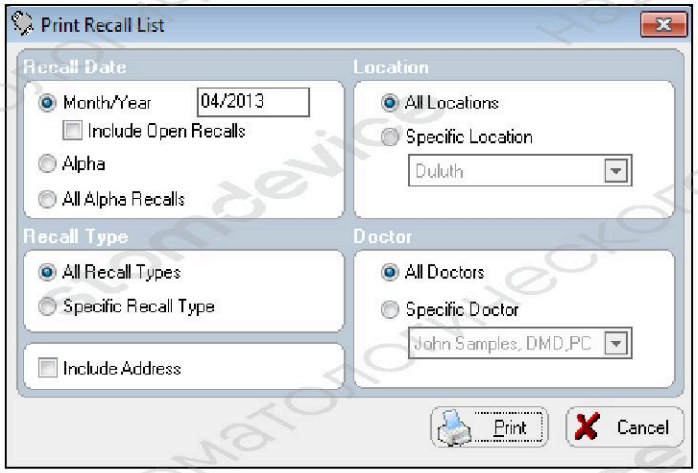
### Printing the Recall List

**Note**

Open recalls are recalls in previous months that have not been canceled.

To print the recall list:

1 Select **Reports > Schedule > Recall List**. The **Print Recall List** window is displayed.




**Note**

You must use Avery 5161 double-column laser printer labels.

2 In the **Recall Date** section, select an option:

- Select **Month/Year** and type the month and year for which you want to print a recall list. Select **Include Open Recalls,** if appropriate.
- Select **Alpha** and type the alpha code for which you want to print a recall list.
- Select **All Alpha Recalls** to print a recall list for all alpha recalls.

3 In the **Location** section, select all locations or a specific location.

4 In the **Recall Type** section, select all recall types or a specific recall type.

5 Select **Include Addresses** to print addresses on the report.

6 In the **Doctor** section, select all doctors or a specific doctor.

7 Click **Print**.

### Printing Recall Labels

Use the recall labels function to print labels for pre-printed recall cards.

To print recall labels:

1 Select **Reports > Schedule > Recall Labels**. The **Recall Mailing Labels** window is displayed.

2 In the **Recall Date** section, the **Month/Year** option is selected by default. Type the month and year for which you want to print recall labels, or select **Alpha** and type the alpha code for which you want to print recall labels.

3 In the **Recall Type** section, select whether to print labels for all recall types or a specific recall type.

4 In the **Location** section, select whether to print labels for all locations or a specific location.

5 In the **Doctor** section, select whether to print labels for patients of all doctors or a specific doctor.

6 Click **OK**.



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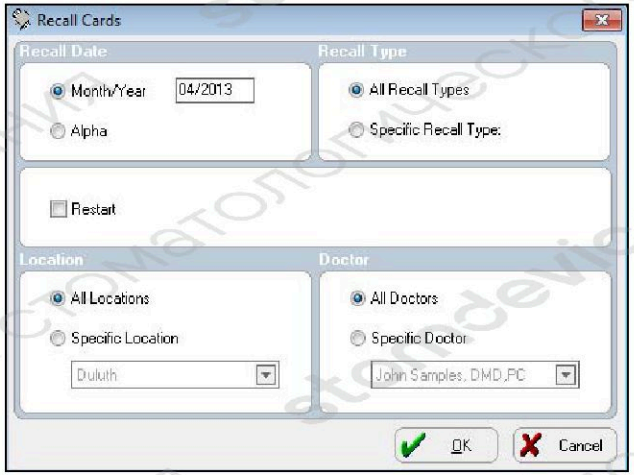
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## Printing Recall Cards

You can print recall cards for patients with recalls in a specific month and year or a specific alpha recall code.

To print recall cards:

1 On the main menu, select **Reports > Schedule > Recall Cards**. The **Recall Cards** window is displayed.



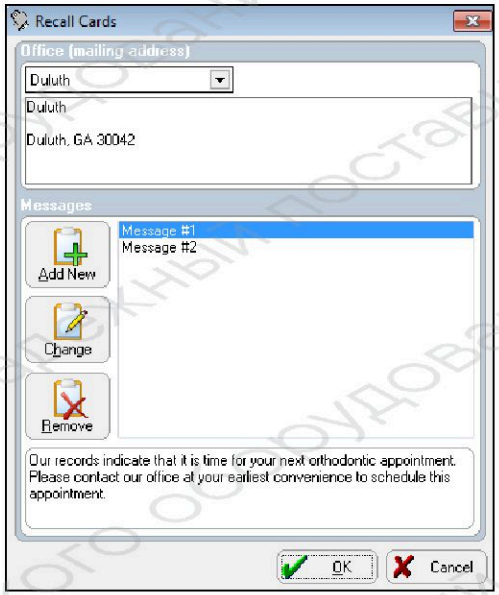

2 In the **Recall Date** section, the **Month/Year** option is selected by default. Type the month and year for which you want to generate recall cards, or select **Alpha** and type the alpha code for which you want to print recall cards.

3 In the **Recall Type** section, select whether to print cards for all recall types or a specific recall type.

4 In the **Location** section, select whether to print cards for all locations or a specific location.

5 In the **Doctor** section, select whether to print cards for patients of all doctors or a specific doctor.

6 Click **OK**. The **Recall Cards Messages** window is displayed.




7 In the **Messages** section, select a recall message. The text for the recall message is displayed at the bottom of the **Messages** section.

8 Click **OK**. The **Print Setup** window is displayed. Select the printer on which you want to print recall cards, verify the printer settings, and click **OK**.

## Creating a Recall Card Message

Two default recall card messages are included in the software, but you can create your own messages.

To create a recall card message:

1 In the **Recall Cards Messages** window, select **Add New**. The **Add Recall Card Message** window is displayed.

2 In the **Message Name** field, type the name for the new message.



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**Note**

The maximum length for a recall message is 255 characters.

3 In the **Message Text** field, type the text you want to print on the recall cards. You can include merge fields in your message to insert patient information automatically. A list of merge fields can be found in the online help at **Help > OrthoTrac Help > Recall Card Merge Fields**.

4 Click **OK**.

### Editing a Recall Card Message

To edit a recall card message:

1 In the **Recall Cards Messages** window, select the message you want to edit and click **Change**. The **Change Recall Card Message** window is displayed.

2 In the **Message Text** field, edit the text.

3 Click **OK**.

### Restarting Recall Card Printing After a Printer Jam

If you are printing recall cards and your printer jams or runs out of cards, you do not have to reprint the entire list of patients.

To continue printing:

1 On the main menu, select **Reports > Schedule > Recall Cards.** The **Recall Cards** window is displayed.

2 Select the **Restart** option and type the first five characters of the last name printed on the last good card.

3 Click **OK**.

## Using the Future Procedures Report

The Future Procedures report produces a list of procedures that are linked to appointment codes for future days on the schedule. You can use this report to keep doctors and assistants informed about upcoming procedures.

The report includes a summary page that enables the doctor to track the totals on certain procedures for a specific period of time.

To print the Future Procedures report:

1 Select **Reports > Schedule > Future Procedures**. The **Print Future Procedures** window is displayed.

2 Type a start date and an end date for the report.

3 Select **All Procedures** or **Selected Procedures**.

If you chose **Selected Procedures**, the **Procedures** window is displayed. Select procedures on the left side of the window, click the arrow button to move them to the right side of the window, and click **OK** to include them in the report.

4 Select **Order by Procedure** or **Chronological Order**.

5 Click **OK**.



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## Printing the Schedule

The software enables you to print the schedule in two formats: list format and schedule format.

### Printing the Schedule in List Format

The list format produces a list of patients who have an appointment scheduled on a particular date. You can print a report for one date or a range of dates and can sort the report by patient number, patient name, or appointment time.

To print the schedule in list format:

1. Select **Reports > Schedule > Daily Schedule > List Format**. The **Print Daily Schedule** window is displayed.
2. Type the date or range of dates for the schedule you want to print.
3. In the **Sort By** section, select the option by which the schedule is sorted.
4. In the **Print Patient Name as** section, select the way the patient name should display on the schedule.
5. In the **Chairs** section, select whether to print all chairs or a specific chair.
6. In the **Include** section, select the options to include on the schedule.
7. In the **Print First Column as** section, select the way the first column should display on the schedule.
8. Click **Print**.

### Printing the Schedule in Schedule Format

The schedule format replicates the grid. You can print a schedule for one date or a range of dates and include patient information.

To print the schedule in schedule format:

1. Select **Reports > Schedule > Daily Schedule > Schedule Format**. The **Print Daily Schedule** window is displayed.
2. Type the date or range of dates you want to print.
3. In the **Options** section, select the options by which the schedule should be sorted.
4. Click **OK**.



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## Skill Sharpeners

### Exercise 1—Schedule an Appointment from the Patient Chart

Laurie Abbott, an existing patient, calls your office for an appointment. She states that it is not an emergency, but she would like to come in within the next few days.

To schedule an appointment from Laurie's chart:

1 Click the **Open Patient Chart** button. The **CS OrthoTrac Patient Lookup** window is displayed.

2 Type **Abbott** (the patient's last name) and press Enter. If there is more than one client with that last name, ensure that the proper name is selected and click **OK**. The patient chart is displayed.

3 Click the **Schedule Appointment** button. The **Appointment Summary** window is displayed.

4 Click **Schedule Appointment**. The **View Schedule window** is displayed.

5 Select a date during the week when Laurie can come in for an appointment. The View or Zoom view of the schedule is displayed.

6 Click an open ADJ appointment for a time that Laurie can come to the office. The **Appointment Details** window is displayed.

7 If necessary, change the information in the **Type** or **Units** fields, or type a comment about the patient. Click **OK**.

8 Click **Close**.

### Exercise 2—Search for an Appointment

John Doe has already had his records exam and calls your office to say that he is ready to begin treatment. He can only come in for a banding appointment on a Tuesday, Wednesday, or Thursday morning. How can you search quickly for an appointment that works for Mr. Doe?

To search for an appointment:

1 In the patient chart, click the **Schedule Appointment** button. The **Appointment Summary** window is displayed.

2 Click **Schedule Appointment**. The **View Schedule** window is displayed.

3 Select the office and doctor from the **Schedule Office** and **Schedule Doctor** standards.

4 Select the appointment type **BND9** from the **Find Appointments** standard. A list of available appointment times is displayed.

5 To refine your selections, click **Edit Settings**. The **Searching for** window is displayed. Select from the following fields:

- Between these times: 8:00 am to 12:00 pm
- On these days: Deselect **Tuesday**, **Friday**, and **Saturday**

6 Click **Start Searching**. A list of available times is displayed.

7 Click an appointment time. The appointment information is displayed, including the patient name, date, time, chair, type, time units, and any associated comments. In this window, you can:

- Select the color of the appointment.
- Select the procedures associated with this appointment.



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- Access the **CS OrthoTrac Patient Lookup** window.
- View sibling appointments

8 Click **OK**. The appointment is scheduled.

### Exercise 3—Cancel an Appointment

A patient calls your office to tell you that he is unable to keep his scheduled appointment and he will call you back when he is able to reschedule.

To cancel an appointment:

1 In a patient chart, click **Schedule Appointment**. The **Appointment Summary** window is displayed.

2 Click the red **X** next to the appointment you want to delete. The **Cancel Appointment** window is displayed.

3 Select an option to identify who is canceling the appointment.

4 Click **OK**.



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Lesson 6

# Understanding the Scheduling Module

This lesson includes:


- Using the Schedule Appointment Calendar on page 47
- Understanding Schedule Views on page 48
- Understanding the Appointment Details Window on page 51
- Understanding the Appointment Summary Window on page 52


## Using the Schedule Appointment Calendar

The **Schedule Appointment** calendar enables you to schedule appointments and recalls for your patients and gives you several ways to view your upcoming appointments. You can access this window from the main menu or from the patient chart.

When you open the **Schedule Appointment** calendar from within the patient chart, you can view recall appointments, sibling appointments, treatment plan information, and the next appointment.

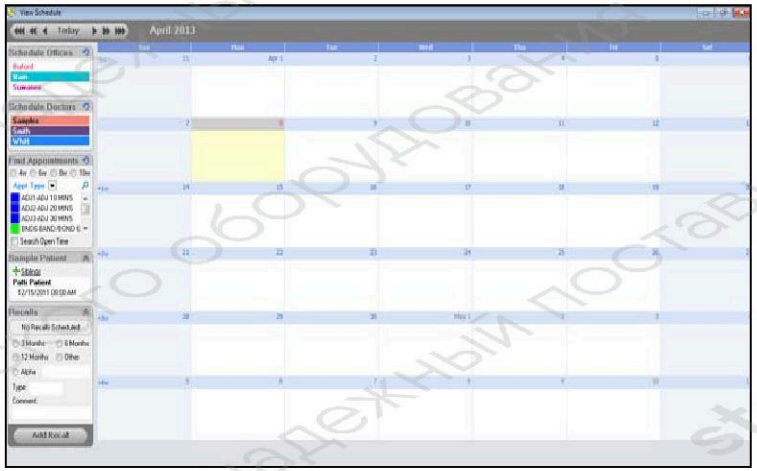
To access the **Schedule Appointment** calendar, click the **Schedule Appointment** button, or select **Functions > Schedule Appointment** from the menu bar.

**OR**

In the patient chart, click the **Schedule Appointment** button, and then click **Schedule Appointment**.



**Schedule Appointment**



When using the **Schedule Appointment** calendar, remember that:

- Active schedule days on the calendar display all available doctors in their corresponding color.
- Schedule dates in the past that have not yet been archived are displayed in light gray with black text.
- Archived dates are displayed in dark gray with white text.
- To view past months, click the left arrow on the **Today** button. To view future months, click the right arrow on the **Today** button.



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- At the beginning of each week, a minus or a plus sign is displayed, indicating whether the week is in the past or the future. A number indicates how many weeks behind or ahead of the current week the selected week is. For example, **+1w** indicates that a week is one week after the present week, while **-3w** indicates that the week is three weeks before the present week.
- When accessed from the patient chart, the left side of the window displays the following standards:
  - **Schedule Offices**
  - **Schedule Doctors**
  - **Find Appointments**
  - **Patient Name**
  - **Charting Detail**
  - **Recalls**

## Understanding Schedule Views

There are three ways to view your schedule:

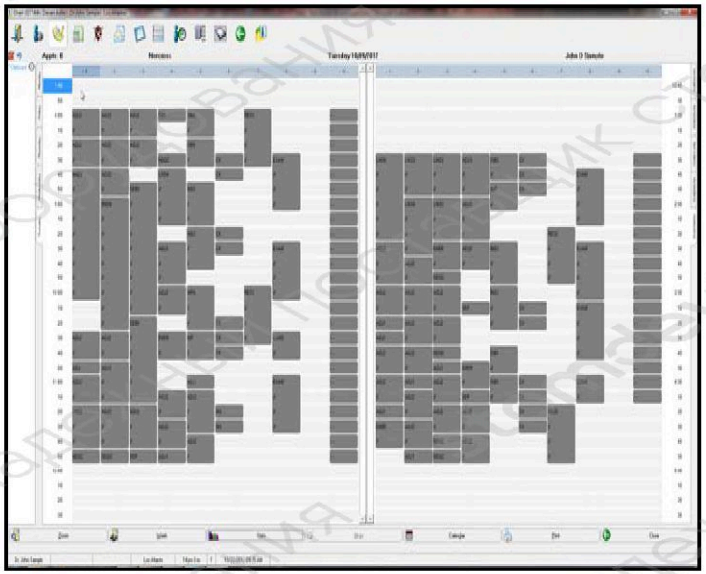
- Week-at-a-Glance displays a week.
- View displays a single day.
- Zoom displays a portion of a specific day.

## Viewing the Schedule–Week-at-a-Glance

To use the Week-at-a-Glance view:

1 In the **Schedule Appointment** calendar, select a date and click a provider's name. The **View** window is displayed.

2 Click **Week**. The appointments on all days in a week are displayed, and you can adjust your scheduling.



3 Click on a day to select it.

Week-at-a-Glance view symbols:

- Smiley face–Indicates that a patient is scheduled in this appointment time.
- Arrows–Indicate that the appointment is more than one unit.
- Gray spaces–Indicate blocked-out or closed time.
- Dashed lines (--)–Indicate open time.



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- Appointment type initials–Indicate what type of appointment is on the schedule.
- Forward slashes (//)–Indicate that more than one unit of time is reserved for the appointment type.

Hold your mouse button down on a scheduled appointment (smiley face) to display the patient's name, appointment time, the number of units, and appointment length.

4 Use the buttons at the bottom of the **Week-At-A-Glance View** window to see more information about the schedule.

- View–Displays the **View Single Day** view of the schedule.
- Zoom–Displays the Zoom mode of the schedule for that day.
- Stats–Displays the **Schedule Statistics** window.
- Calendar–Displays the **View Schedule** window.
- Print– Prints a copy of the schedule.
- Close–Closes the **Week-at-a-Glance View** window and returns you to the patient chart or main menu.

5 Click the reserved time or open time in which you want to schedule a patient and click **Zoom**. The Zoom mode is displayed with that time visible.

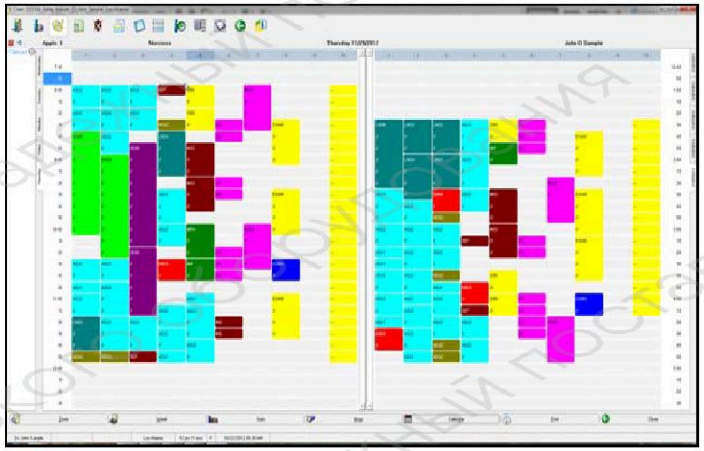
6 Click the appointment type you want to schedule. The **Appointment Details** window is displayed.

**Note:** When a week has already passed, no-show and completed appointments are view only.

## Viewing the Schedule–View

To use the View mode:

1 In the **Schedule Appointment** window, select a date and click **View**. You can use this view to schedule a patient who must have an appointment on a specific day.



2 From the patient's chart, select **Functions > Schedule Appointment**. The **Appointment Summary** view is displayed.

3 Click **Schedule Appointment**. The **View Schedule** window is displayed.

4 Click the name of a doctor on the date you want to schedule. The View mode is displayed.

5 To view statistical information about the day, double-click the name of the doctor on the date and then select **View Day**.

The following buttons are available on the bottom bar:

- **Zoom**–Displays the schedule in Zoom mode for that day.
- **Week**–Displays the Week-at-a-Glance schedule.



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- **Stats**–Displays the **Schedule Statistics** window.
- **Msgs**–Displays the **Schedule Messages** window, where you can add or view messages about the schedule.
- **Calendar**–Displays the **View Schedule** window.
- **Print**–Prints a copy of the schedule.
- **Close**–Closes the Zoom view and returns you to the patient chart.

**Note**

You must have Override Preblock security permission to override blocked time.

6 Click an appointment block. The appointment information is displayed, including the patient name, the date, time, chair, type, time units, and any comments. In this window you can:

- Select the color of the appointment.
- Select the procedures associated with the appointment.
- Access the **CS OrthoTrac Patient Lookup** window.
- View sibling appointments.

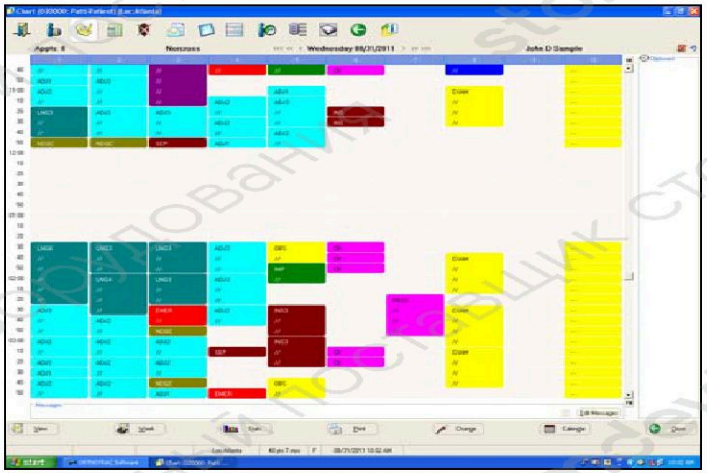
7 Click **OK** to finish scheduling the appointment. If the appointment time was blocked, the software prompts you to override the blocked time. Click **Yes**.

8 Click **Close**. The patient's chart is displayed.

## Viewing the Schedule–Zoom

To use the Zoom mode:

1 In the **Schedule Appointment** calendar, select a date and click **Zoom** to display part of a single schedule day.



2 Use the scroll bar along the right side of the window to move within the day. You can click AM or PM above and below the scroll bar to go to the beginning or end of the day.

3 Click an open time or reserved space. The **Appointment Details** window is displayed.

4 Click an arrow button at the top of the window to move backward or forward through the schedule.

5 Use the buttons across the bottom of the **Zoom Mode** window to see additional information about the schedule.



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6 Click **Edit Messages** to add or change messages. To view all messages one at a time, use the scroll arrows.

7 Click on the day of the week and date at the top of the schedule to select a different date.

8 Click the location name at the top of the schedule to select a different schedule location.

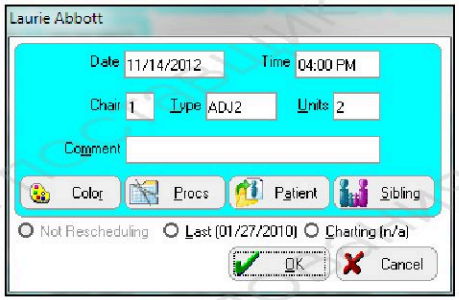
9 Click the doctor name at the top of the schedule to display a list of doctors in your practice, enabling you to change the schedule doctor.

- Select the new doctor's name and click **OK**. A prompt is displayed, asking you to confirm the change. Click **Yes**.
- Open patient flow to update all patients scheduled for the day with the new doctor.

10 To return to the **Appointment Summary** window from the Zoom display, click **Close.**

## Understanding the Appointment Details Window

The **Appointment Details** window displays the date, chair, and time you select and enables you to change information about the appointment.




The window contains the following information:

- Patient name
- Date and time of appointment
- Chair #
- Appointment type
- Number of units for the appointment
- Comment

The buttons at the bottom of the window enable you to change the appointment information. The buttons include:

- **Color**–Changes the color of the appointment on the schedule.
- **Procs**–Displays the **Procedures** window, where you can view and change the procedures attached to the appointment type.
- **Patient**–Schedules an appointment for another patient without having to open the second patient's chart.
- **Sibling**–Schedules an appointment for a sibling of the current patient without having to open the sibling's chart.

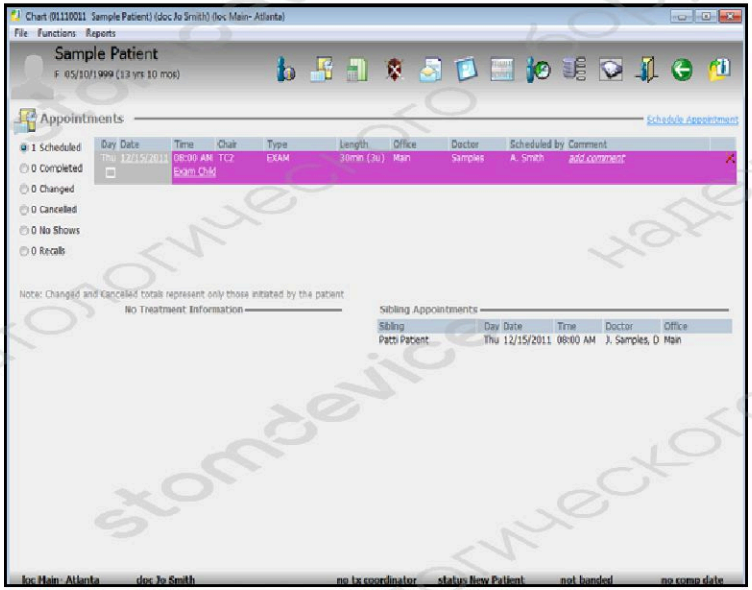


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## Understanding the Appointment Summary Window

The **Appointment Summary** window is displayed when you click **Schedule Appointment** from inside a patient's chart.




The **Appointment Summary** window contains information about all of a patient's past, current, and future appointments and defaults to currently scheduled appointments, which are displayed in the center of the window. No Show and Recall appointments are also displayed.

The window contains the following details about the appointment:

- Day
- Date
- Time
- Chair
- Type
- Length
- Office
- Doctor
- Scheduled by
- Comment

Use the scroll bar to view earlier or later appointments in a category.

The following options enable you to access more information about a patient's scheduled appointments:

- **Confirm Appointment**–Click the box next to a patient's appointment to view contact numbers, enter details from the confirmation phone call, and mark the appointment as confirmed.
- **View Day**–Click the appointment date to view the entire day on which a specific appointment is scheduled.
- **Change Comment**–Click **Add Comment** to edit a comment that was made when the appointment was scheduled. You can also add a comment to a scheduled appointment.
- **Procedures**–Descriptions of procedure codes for scheduled, completed, changed, or cancelled appointments are displayed beneath the appointment time. Click the description to add or edit procedure codes linked to scheduled appointments.



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## Skill Sharpeners

### Exercise 1—Change the Scheduling Module from View to Week-at-a-Glance to Zoom

A patient calls the office requesting an appointment and you want to see the upcoming week's schedule. To change views:

1 In the **Schedule Appointment** calendar, select a date and click a provider's name. The **View** window is displayed.

2 Click **Week**. The appointments on all days in a week are displayed.

3 Click on a day to select it.

4 Use the buttons at the bottom of the **Week-At-A-Glance View** window to see more information about the schedule.

- **View**—Displays the **View Single Day** view of the schedule.
- **Zoom**—Displays the Zoom mode of the schedule for that day.
- **Stats**—Displays the **Schedule Statistics** window.
- **Calendar**—Displays the **View Schedule** window.
- **Print**— Prints a copy of the schedule.
- **Close**—Closes the **Week-at-a-Glance View** window and returns you to the patient chart or main menu.

5 Click the reserved time or open time in which you want to schedule the patient and click **Zoom**. The Zoom mode is displayed with that time visible.

6 Click the appointment type you want to schedule. The **Appointment Details** window is displayed.

### Exercise 2—Use the Appointment Summary Window to Find Information About a Patient's Appointment

You want to find information about an upcoming appointment. To use the **Appointment Summary** window:

1 In the patient's chart, click **Schedule Appointment**. The **Appointment Summary** window is displayed.

In the center of the window, you can find information about the patient's past, current, and future appointments, plus No Shows and Recalls.

2 To access more information about the patient's scheduled appointments, use the following functions:

- **Confirm Appointment**
- **View Day**
- **Change Comment**
- **Procedures**



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Lesson 7

# Using the Financial Functions Windows

This lesson includes:


- Using the Menu Bar on page 55
- Using the Financial Buttons on page 55


## Using the Menu Bar

The menu bar at the top of the financial functions windows contains the following options:

- **File**–Enables you to open a new account, save information for the current account, or re-open any of the last five accounts you have accessed.
- **View**–Changes with each financial function you access and displays options for the active function.
- **Functions**–Provides shortcuts to all financial tasks.
- **Reports**–Enables you to print an appointment ticket, statement, ledger activity, contract coupons, or any promises that have been entered for the current account.
- **Set-up**–Enables you to access the **Procedure Code Maintenance** window so you can enter new procedure codes or make changes without exiting the financial functions window.

## Using the Financial Buttons

If you have the appropriate security permissions and have purchased the additional modules, you can access all of the financial functions with the following buttons:.

| | |
|---|---|
|  Charges and Payments |  Adjustments |
|  Totals |  Ledger |
|  Contracts and Payment Plans |  Promises/Collections |
|  Auto Payments |  Claims |
|  Post Transactions |  Close |

**Important**

**Before you can use the financial functions windows, you must convert your balances.**



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## Using the Financial Functions—Charges and Payments Window

Post charges and payments in the **Financial Functions---Charges and Payments** window.



**Financial Functions**

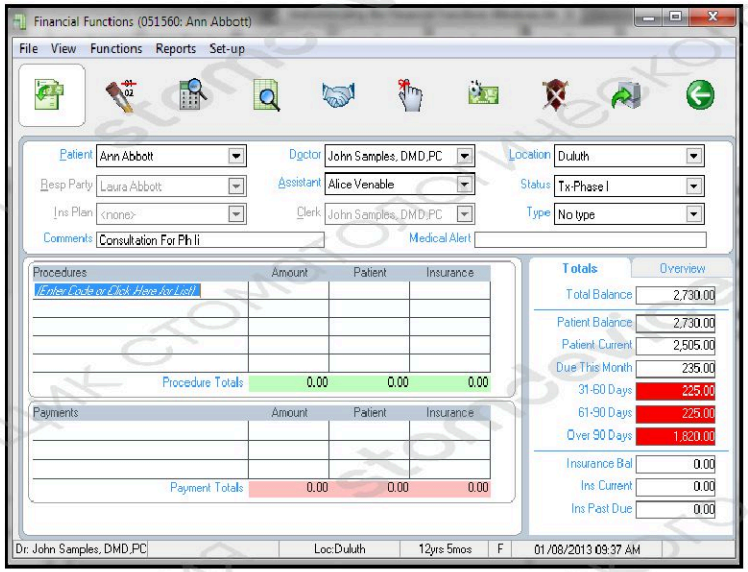
To access the **Financial Functions—Charges and Payments** window from a patient's chart, click the **Financial Functions** button. The **Financial Functions—Charges and Payments** window is displayed.

**OR**



**Charges and Payments**

If you are working in another financial window, click the **Charges and Payments** button. The **Financial Functions—Charges and Payments** window is displayed.




**Note**

The **Type** and **Status** fields might be replaced by **Banding** and **Estimate Comp** date fields, depending on the financial functions you select.

### Patient Information

The **Patient Information** section contains:

- **Patient**—Use the drop-down list to switch between different family members when posting a charge or payment.
- **Resp Party** and **Ins Plan**—Use the drop-down lists to assign charges, post payments, or make adjustments to any of the financially responsible accounts.
- **Doctor**, **Assistant**, and **Clerk**—Use to indicate who is responsible for production and collection activity for a specific transaction.
- **Location**—Use the drop-down list to select the office in which the work is done, if different from the patient's chart location.
- **Type** and **Status**—Use the drop-down lists to change the treatment type and status.
- **Comments** and **Medical Alert**—Use when accessing any financial function.

### Account Information

Patient account information is located below the patient information section. The information and fields displayed depend on the financial function you are performing. The fields include:

- **Procedures**—Charges for procedures associated with scheduled appointments are posted automatically when checking a patient out. You also use the **Procedures** section to post charges manually for procedures or products that are not included in the contract charge.
- **Payments**—This section enables you to post patient and insurance payments manually. Payments are posted



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automatically against outstanding promises made by the responsible party.

- **Totals**–This tab displays the total balance, patient portion, current balance, and aging for a responsible party. The combined balances for all insurance carriers associated with a patient are displayed below the responsible party balances.
- **Overview**–This tab gives a financial overview of the account. At the top is the amount applied to the ledger at the next roll and the responsible party's billing status and discount, if applicable. In the center is the statement code, late charge amount, risk code, and roll day. At the bottom is the date and amount of the last statement and payment made for the account.
- **Auto Payment Information**–This information is displayed below the **Payments** section when the **Cheques/Drafts** option is selected from the **View** menu. This section shows the total number of payments, the date the next payment is to be posted, and when the last payment is scheduled to be posted.

## Posting Charges

When you post a charge using a procedure code, the software can make changes automatically to the patient account and prompt you for additional information, depending on how you set up your procedure codes.

To post a charge on a patient account:

1 In the **Procedures** section of the **Financial Functions–Charges and Payments** window, enter the procedure code:

- Type the procedure code for the charge.
  **OR**
- Press the spacebar or click **Enter Code or Click Here for List** to display the **Procedures** window, and select the procedure.

2 In the **Procedures** section:

- To split the charge amount between the patient and the insurance company, see "Splitting a Charge Amount" on page 57.
- To add a comment about a procedure, type the comment on the line below the procedure and press Enter.

3 When you are finished adding charges to the account:

- Click the **Post Transactions** button to post the charges.
- Post a payment. See "Posting Payments" on page 58.

4 Click **Close** or press **Enter** when the **Close** button is selected.

### Splitting a Charge Amount

You can split the amount attached to a procedure between the responsible party and insurance carrier.

To split a charge amount:

1 In the **Amount** field, press Tab or Enter to move the cursor to the **Patient** field.

2 Enter the patient's portion of the charge as a dollar amount or as a percentage. Press Tab. The software enters the remaining amount in the **Insurance** field.

3 Press Enter or Tab to continue with another charge.

**Note**

Remove an incorrect charge by selecting the procedure and pressing Delete.



**Post Transactions**

**Note**

To split a charge amount, an insurance carrier must be attached to the patient/responsible party.

**Note**

Type the amount followed by the percent sign or a forward slash.



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## Posting Payments

You can post a payment immediately after posting charges, or you can post a group of payments, such as payments mailed to your office.

To post a payment:

1 In the **Payments** section of the **Financial Functions—Charges and Payments** window, select the payment type you want to post. Press Tab or Enter.

2 Type a payment reference number, and press Tab or Enter. The cursor moves to the **Amount** field.

3 In the **Amount** field, type the payment amount. If necessary, enter the patient and insurance portions. See step 2 in "Splitting a Charge Amount" on page 57.

4 Click the **Post Transactions** button or press Enter when the **Post Transactions** button is selected.

5 Click **Close** or press Enter when the **Close** button is selected.



**Adjustments**

### Posting Personal or Mailed-In Checks

To post personal payments made by checks:

1 In any financial function window, press Ctrl+O. The **CS OrthoTrac Patient Lookup** window is displayed.

2 Select the name of the patient whose payment you want to post and click **OK**.

**OR**

If the patient name is not indicated on the check, search for the responsible party by clicking the **Responsible** option. Select the responsible party and click **OK**.

The **Financial Functions—Charges and Payments** window is displayed.

3 In the **Payments** section, select **Mail-in Ck** from the drop-down payments list and press Enter.

4 Type the reference number and press Enter.

5 Type the payment amount and press Enter until the **Post Transactions** button is selected and press Enter to save the transaction. Or press Ctrl+S to save and post the transaction.

6 Press Ctrl+O. The **CS OrthoTrac Patient Lookup** window is displayed. Select the name of the next patient and repeat the above steps.

## Using the Financial Functions—Adjustments Window

The **Financial Functions—Adjustments** window enables you to correct posting errors, transfer balances, issue refunds, and post discounts and write-offs.

To access the **Financial Functions—Adjustments** window, click the **Financial Functions** button in the patient chart. The **Financial Functions—Charges and Payments** window is displayed. Click the **Adjustments** button. The **Financial Functions—Adjustments** window is displayed.

**OR**

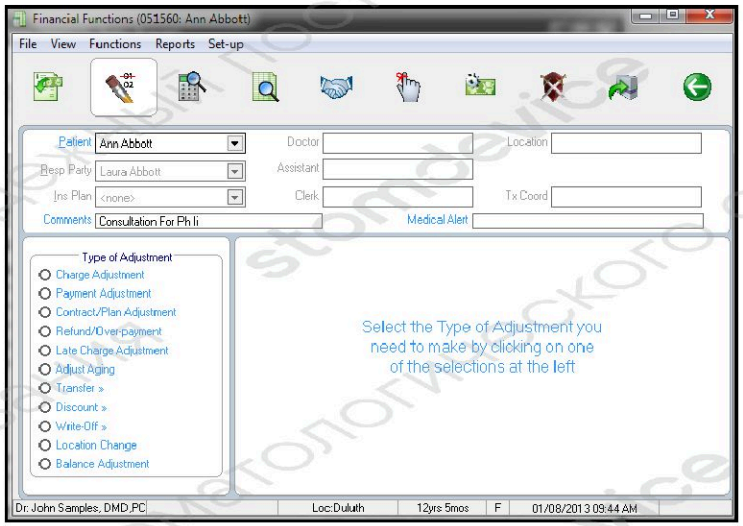
If you are working in another financial window, click the **Adjustments** button.



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The **Financial Functions–Adjustments** window is displayed.




You must enter a comment to indicate why the adjustment is being made. In most cases, the software provides a comment with details about the adjustment.

Adjustments are classified into the following categories:

- Transaction Adjustments–Transaction adjustments display a list of posted transactions in a grid, enabling you to select the transaction that needs adjustment. Transaction adjustments reverse the selected entry. If a transaction is split, both the responsible party and insurance amounts are adjusted automatically.
- Balance Adjustments–Balance adjustments are not related to a specific transaction but, instead, affect the patient's total balance, current balance, or both. Refunds, discounts, and write-offs are examples of balance adjustments. The adjust aging and location change functions are also considered balance adjustments.
- Transfers–Transfers enable you to divide money among patients, responsible parties, and insurance carriers. Most transfers allow you to move money only within the family account. The responsible party to responsible party transfer is the only transfer that enables you to move money to an account outside of the family account.

## Making a Charge Adjustment

Charge adjustments are used for adjusting non-contract charges from a patient ledger and patient tracking record; for example, retainer replacement charge, broken bracket charge, panoramic x-ray charge, and so on.

**Note**

You cannot partially adjust a charge or a payment.

Use this adjustment for:

- A charge posted for the wrong dollar amount
- A charge posted to the wrong patient/responsible party

To make a charge adjustment:

1. Select the **Charge Adjustment** option in the **Financial Functions–Adjustments** window. The charges available for adjustment are displayed in the center of the window.
2. Select the charge you want to adjust. A default comment is displayed in the **Comment** section. Add a comment at the end of this comment, or select the default comment and replace it.
3. Click **Posted in Error**. The **Posted in Error** window is displayed, showing a description of the procedure and all accounts that are affected by the adjustment.
4. Click **OK**.



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## Making a Payment Adjustment

Payment adjustments are used to correct payments posted to the ledger. Use this adjustment when:

- A payment is posted for the wrong amount.
- A payment is posted to the incorrect patient, responsible party, or insurance.
- A check is returned from the bank due to insufficient funds.
- A credit card payment is posted in error.
- A payment posting error is found after the daysheet has been closed and the deposit has been made.

To make a payment adjustment:

1 Select the **Payment Adjustment** option in the **Financial Functions—Adjustments** window. The payments available for adjustment are displayed in the center of the window.

2 Select the payment you want to adjust. A default comment is displayed in the **Comment** section. Add a comment at the end of this comment, or select the default comment and replace it.

3 Click **Posted in Error**. The **Posted in Error** window is displayed, showing a description of the payment and all accounts that are affected by the adjustment.

4 Click **OK**.

**Note**

Bulk insurance payments are not reversible using the payment adjustment feature. You must use the balance adjustment feature to reverse bulk payments.

### Making a Payment Adjustment for a Returned Check

The **Payment Adjustment Input** window enables you to make standard payment adjustments, as well as adjustments for checks returned by the bank due to insufficient funds. Selecting a personal check, mail-in check, traveler's check, or post-dated check in the transaction grid activates the **Returned Check** button. When you identify a payment as a returned check, the **Financial Functions—Adjustments** window includes the option to post an NSF charge.

To make a payment adjustment for an NSF check:

1 Select the **Payment Adjustment** option in the **Financial Functions—Adjustments** window. The payments available for adjustment are displayed in the center of the window.

2 Select the payment you want to adjust. A default comment is displayed in the **Comment** section. Add a comment at the end of this comment, or select the default comment and replace it.

3 Click **Returned Check**. The **Returned Check** window is displayed, showing a description of the payment and all accounts that are affected by the adjustment.

4 Click **OK**. The NSF charge can be changed to a different dollar amount or changed to zero by entering the new amount in the **NSF Charge Amount** field.

5 Click **OK**, and the responsible party displayed in the window is assessed the NSF charge.

## Viewing Totals

The totals function enables you to view the balance and aging for an account. You can view totals in two ways:

- **View by Responsible Party**—Displays tabs for all responsible parties and insurance carriers that are linked, with each patient listed in a grid.
- **View by Patient**—Displays tabs for all patients that are linked, with each responsible party and insurance carrier listed separately in a grid.



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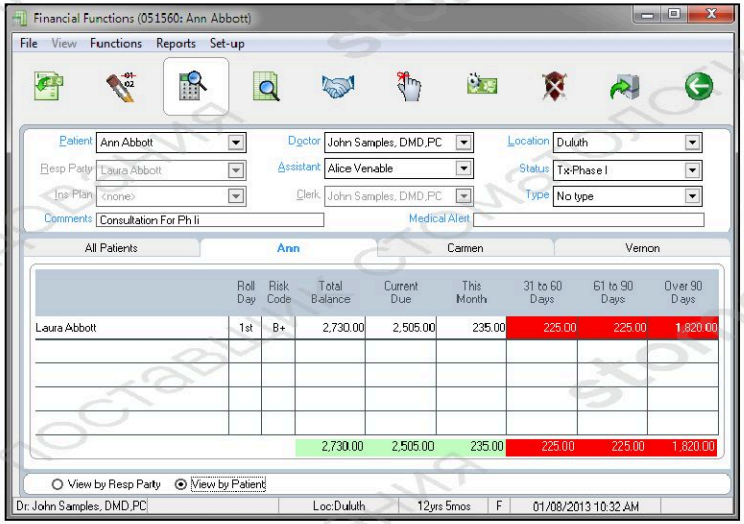
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Both view options include an **All** tab that combines the balances for the accounts. The account detail grid displays the roll day, risk code, balances, and aging for the accounts. The total for each aging category is displayed below the account detail grid.

To access the **Financial Functions–Totals** window, click the **Financial Functions** button in the patient chart. The **Financial Functions–Charges and Payments** window is displayed. Click the **Totals** button. The **Financial Functions–Totals** window is displayed.

**OR**

If you are working in another financial window, click the **Totals** button. If you have made changes and have not posted them, the software displays a message asking you to post the transactions before continuing. The **Financial Functions–Totals** window is displayed.




To view account totals and aging:

1 Click the tabs across the top of the totals display to view account information for individual patients who are linked.

2 Select the **View by Resp Party** option to display tabs containing account information for all responsible parties and insurance carriers that are linked.

3 Use the **Patient** or **Resp Party** drop-down lists to view another patient or responsible party. The views vary, depending on how the patients are linked in the patient chart.

4 Click **Close**.


Financial Functions


Totals

## Viewing the Ledger

The ledger displays all financial activity for an account. You can view ledger activity in these ways:

- **View by Patient**–Displays tabs for all patients that are linked, with the name of the responsible party or insurance carrier listed in a grid.
- **View by Responsible Party**–Displays tabs for all responsible parties and insurance carriers that are linked, with the patient names listed in a grid.
- **View by Single Account**–Displays tabs for all responsible parties and insurance carriers for a single patient account.

**Note**

You can enter ledger comments only when using the **View by Resp Party** option.

**Tip**

To print a copy of the ledger, select **Reports > Ledger > Patient Copy** or **Reports > Ledger > Office Copy**.

To access the **Financial Functions–Ledger** window, click the **Financial Functions** button in the patient chart. The **Financial Functions–Charges and Payments** window is displayed. Click the **Ledger** button. The **Financial Functions–Ledger** window is displayed.


Ledger

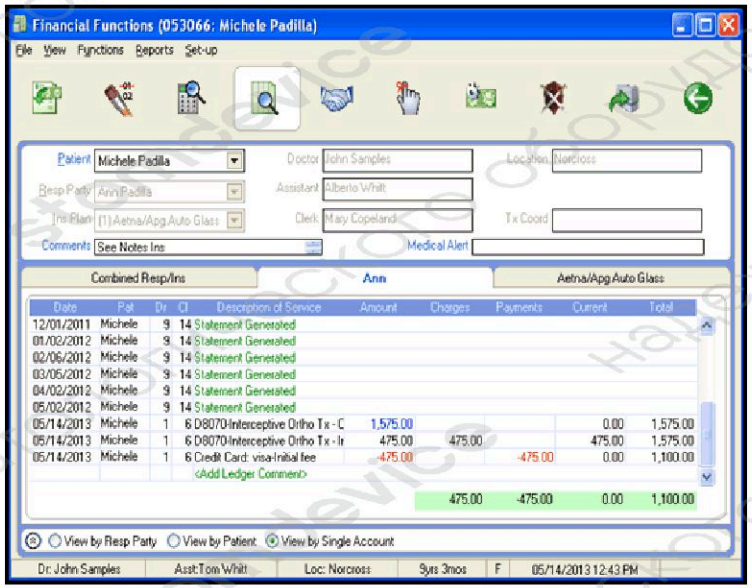
**OR**



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If you are working in another financial window, click the **Ledger** button. The **Financial Functions—Ledger** window is displayed.




To view ledger information:

1 Click the tabs across the top of the ledger display to view account information for individual patients who are linked.

2 Select **View by Resp Party** to display tabs containing account information for all responsible parties and insurance carriers that are linked.

Use the **Patient** or **Resp Party** drop-down lists to view another patient or responsible party. The views vary, depending on how the patients are linked in the patient chart.

3 Select **View by Single Account** to display tabs containing account information for all responsible parties and insurance carriers for a single patient in the family.

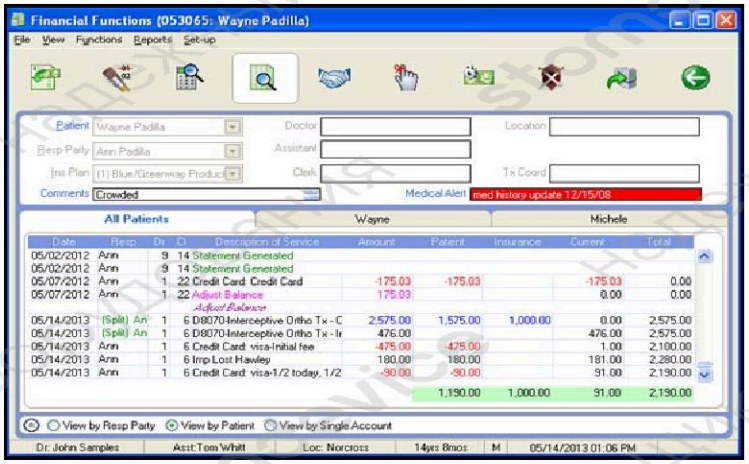
4 Click **Close**.

The account detail grid displays the **Date**, **Responsible Party** or **Patient**, **Doctor Number**, **Clerk Number**, **Description**, and **Amount** for each transaction. If you are viewing one of the individual tabs, the display includes columns for **Charges** and **Payments**.

When you use the **All** tab, the **Charges** and **Payments** columns are replaced by **Patient** and **Insurance** columns.

The grid also includes **Current** and **Total** columns, showing the resulting current balance and total balance after the transaction.

A total for each column is displayed below the account detail grid. When viewing an individual tab, the totals for the **Charges** and **Payments** columns reflect all charges and payments posted to the account identified on the tab selected. On the **All Patients** tab, the totals for the **Patient** and **Insurance** columns reflect the current balance for all patients or all responsible parties.






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When you move the cursor over each line, the name of the responsible party, insurance carrier, and patient to whom the transaction was posted are displayed below the column totals.

If a transaction has been split between a responsible party and insurance, **(Split)** is displayed in the **Resp** column. To display the names of the responsible party and insurance carrier, move the cursor over the **(Split)** indicator.



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## Skill Sharpeners

### Exercise 1—Post Charges and Payments to an Account Outside of Checkout

Mary Doe is not scheduled for an appointment but comes into your office to purchase a whitening kit. How do you charge her for the kit?

To post a charge on a patient account:

1 On the main menu, click the **Open Patient Chart** button. The **CS OrthoTrac Patient Lookup** window is displayed.

2 Type **Doe** and press Enter.

3 Verify that the correct patient is selected and click **OK**. The patient chart is displayed.

4 Click the **Financial Functions** button. The **Financial Functions—Charges and Payments** window is displayed.

5 In the **Procedures** section, type the procedure code for the whitening kit, or click **Enter Code or Click Here for List** to display the **Procedures** window, and select the code from the list.

6 To add a comment about a procedure, type the comment on the line below the procedure and press Enter. A green checkmark is displayed in the **Patient** field to indicate that the comment will be displayed on the patient ledger.

7 Press Tab or Enter to move to the **Payments** section and select a payment type from the list. Press Tab.

8 Type a payment reference number, if necessary, and press Tab. The payment amount is populated automatically. Press Tab until the **Post Transactions** button is highlighted.

9 Click the **Post Transactions** button or press Enter.

10 Click **Close** or press Enter when the **Close** button is selected.

### Exercise 2—Process Mailed-In Payments

After opening the day's mail, you have a stack of checks that need to be posted. How can you post the payments quickly and efficiently?

To post payments your office receives in the mail:

1 In any financial functions window, press Ctrl + O. The **CS OrthoTrac Patient Lookup** window is displayed.

2 Select the name of the patient whose payment you want to post and click **OK**.

If the patient name is not on the check, search for the responsible party by clicking the **Responsible** button. Select the responsible party and click **OK**.

The **Financial Functions—Charges and Payments** window is displayed.

3 Press Ctrl + P to move the cursor to the **Payments** section.

4 Select **Mail-in Ck** from the drop-down payments list and press Enter.

5 Type the reference number and press Enter.

6 Enter the payment amount and press Enter until the **Post Transactions** button is selected and press Enter or Ctrl + S to save the transaction.

7 Press Ctrl + O. The **CS OrthoTrac Patient Lookup** window is displayed. Select the name of the next patient and repeat the above steps.



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### Exercise 3—Process a Bulk Insurance Check

You have received a reimbursement check from Doe Brothers Insurance that contains payments for several patient claims. How do you post the payments accurately, ensuring that the insurance check is dispersed properly?

To post a bulk check:

1 Click the **Insurance Functions** button on the main menu. The **Insurance Functions** menu is displayed. Select **Post Bulk Payment**. The **CS OrthoTrac Carrier Lookup** window is displayed.

2 Select the insurance company that sent you the check and click **OK**. The **Post Bulk Payment** window is displayed.

3 In the **Reference** field, type the reference number from the check. Press Enter.

4 In the **Check Amount** field, type the amount of the check. Press Enter.

The **Paid** column for the first patient in the grid is selected, and the **Ins Cur** and **Pat Cur** balance is displayed.

5 If the amount displayed matches the amount on the EOB for that patient, press Enter. If the EOB lists a different amount, type the new amount and press Enter. A dialog box containing **Patient** and **Insurance** options is displayed.

6 Press Enter or click **Apply** to apply the check amount to the account. To apply the payment to the other account balance, select the account and click **Apply**. A checkmark is displayed next to the balance paid.

7 Select the next patient on the list and repeat the above steps.

8 When all payments have been posted and the **Unallocated** amount is **$0.00**, click **OK**.

9 Click **Print** to print a report.

### Exercise 4—Make a Charge Adjustment

You have posted a charge for a retainer repair to the wrong patient's account. How do you remove the charge?

To make a charge adjustment:

1 Open the chart for the patient whom you charged in error and click the **Financial Functions** button. The **Financial Functions—Charges and Payments** window is displayed.

2 Click the **Adjustments** button. The **Financial Functions—Adjustments** window is displayed.

3 Click **Charge Adjustment**. The charges available for adjustment are displayed in the center of the **Financial Functions—Adjustments** window.

4 Select the charge you want to adjust.

5 Click **Posted in Error**. The **Posted in Error** window is displayed, showing a description of the procedure and all accounts affected by the adjustment.

6 Click **OK** to post the adjustment and update all accounts indicated in the window.

7 Click the **Close** button to return to the patient chart.

8 Click the **Patient Lookup** button and select the patient for whom you want to post the charge.

9 In the patient chart, click the **Financial Functions** button and post the charge to the account. Add a comment indicating the appropriate charge date, if necessary.



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### Exercise 5—Make a Payment Adjustment

You have posted a payment to John Doe's account, but there are two patients named John Doe in your office, and you posted the payment to the wrong account. How do you remove the payment so you can credit the correct account?

To make a payment adjustment:

1 Open the chart for the patient whom you credited mistakenly and click the **Financial Functions** button. The **Financial Functions—Charges and Payments** window is displayed.

2 Click the **Adjustments** button. The **Financial Functions—Adjustments** window is displayed.

3 Click **Payment Adjustment**. The payments available for adjustment are displayed in the center of the **Financial Functions—Adjustments** window.

4 Select the payment you want to adjust. A default comment is displayed in the **Comment** section. Add a comment at the end of this comment, or select the comment and replace it.

5 Click **Posted in Error**. The **Posted in Error** window is displayed, showing a description of the procedure and all accounts affected by the adjustment.

6 Click **OK** to post the adjustment and update all accounts indicated on the window.

7 Click the **Close** button to return to the patient chart.

8 Click the **Patient Lookup** button and select the patient for whom you want to post the payment.

### Exercise 6—Make a Discount Adjustment

There are five types of discount adjustments that enable you to give a discount on a contract or a balance to a patient. This example uses the Staff Discount option.

The daughter of a staff member is starting treatment, and your doctor gives a 50% discount for staff members. How do you apply the discount to your co-worker's account?

To make a discount adjustment:

1 Set up the contract for treatment as you typically would.

2 In the **Financial Functions—Charges and Payments** window, click the **Adjustments** button. The **Financial Functions—Adjustments** window is displayed.

3 Click **Discount**. The account balance information is displayed in the center of the **Financial Functions—Adjustments** window.

4 In the **Type of Discount** section, select **Staff Discount**.

5 In the **Account to Adjust** box, select whether you want the discount to affect the responsible party balance or the insurance balance.

6 In the **Discount Amt** field, type the amount of the discount either as a percentage (10/ or 10%) or a negative dollar amount (-10). The software calculates the effect on the account balances and aging.



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Lesson 8

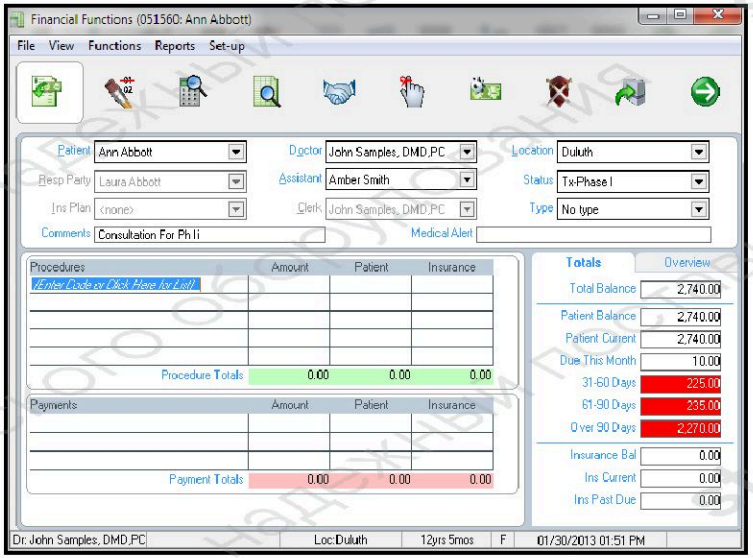
# Checking Patients Out

This lesson includes:


- Posting Procedures and Payments on page 67
- Scheduling the Next Appointment or Recall on page 68
- Printing Tickets, Excuses, or Labels on page 68
- Checking Out Families on page 69


To access patient checkout from the main menu, click the **Patient Checkout** button. The **CS OrthoTrac Patient Lookup** window is displayed. Select the patient name and click **OK**. The **Financial Functions—Charges and Payments** window is displayed, if **Post Procedures** or **Post Payments** is selected in the **Checkout Options** section of the **System Options** window.

To access patient checkout from the patient chart, click the **Patient Checkout** button. The **Financial Functions—Charges and Payments** window is displayed.




## Posting Procedures and Payments

To post the procedures and payments resulting from a patient appointment:

1 In the **Procedures** section, type the procedure codes for the appointment, or click **Enter Code or Click Here for List** to display the **Procedures** window, where you can select procedures to post.

**Important**

**When you begin checking out a patient, you must complete the process, but you do not have to post transactions or schedule appointments.**



**Patient Checkout**



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**Note**

To remove an incorrect charge, select the procedure and press **Delete**.

2 Enter a ledger comment and press Tab or Enter to move to the procedure **Amount** fields. Change the amounts, if necessary. You can split amounts between patient and insurance, provided a carrier has been assigned to the patient, by typing the amount or percentage (% or /).

3 In the **Payments** field, select a payment type from the list, type a payment reference number, and type the payment amount. Type the patient portion and the insurance company portion, if applicable.



**Post Transactions**

4 Click the **Post Transactions** button or press Enter when the **Post Transactions** button is selected.

5 Click **Exit** or the **Close** button.

## Procedure Code Prompts

Depending on how you have configured the software, you can receive one of the following prompts when you post certain procedures:

**Tip**

When scheduling a TxPlan appointment, the calendar date automatically defaults to the targeted date range.

- **Status Change**–If the procedure is set to prompt for a status change, the **Select Status** window is displayed.

  Click on the new status and click **OK**. To keep the existing status, click **Cancel**. If the procedure has only one associated status, the change occurs automatically.

- **Auto-Post Letters**–If the procedure is set to automatically post letters, a letter icon is displayed next to the procedure on the **Financial Functions–Charges and Payments** window. To view the letters that will be posted, click the letter icon. The **Procedure Letter Assignments** window is displayed.

  - To prevent a letter from being posted automatically, click the letter name to display a drop-down arrow.
  - Click the drop-down arrow and select **<None>**.
  - Click **OK**.

- **Tooth/Surface**–If a procedure is set to prompt for a tooth or surface, the **Tooth/Surface** window is displayed. Type the appropriate tooth numbers or surface information in the fields.

- **Create Visit Charge Contract**–A procedure code can create a visit charge contract and post the first charge automatically. When posted, the first charge is applied, and no ledger entry is written for the visit charge contract. The patient's total and current balance increases by the visit charge amount.

## Scheduling the Next Appointment or Recall

In the **Appointment Summary** window, schedule the patient's next appointment or recall.

Attach procedure codes when scheduling appointments so that the software automatically retrieves the procedures the next time the patient checks out.

## Printing Tickets, Excuses, or Labels

After you schedule the patient's next appointment or recall, the **Print Appointment Ticket** window is displayed.

If you have configured your workstation to print appointment labels to a label printer, you are prompted to print the labels for the patient.

After printing an appointment ticket, excuse, or appointment label, click the **Close Chart/Select Another Patient** button to close the current patient chart and select the next patient.



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## Checking Out Families

To check out a family:

1. Check out a single family member, posting that person's procedures and payments as usual.
2. Check out another family member by selecting the family member's name from the drop-down list in the **Patient** field. Repeat this process for each additional family member.
3. After you have posted the financial information for all family members, close the **Financial Functions—Charges and Payments** window. The **Appointment Summary** window is displayed. The original patient is selected for scheduling.
4. Transfer information from the patient's treatment card.
5. Schedule appointments for additional family members by selecting an appointment date and time, then clicking **Select Sibling** in the **Appointment Details** window.



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## Skill Sharpeners

### Exercise 1—Check a Patient Out

Susie Doe has come in for her regular adjustment appointment. Now she is ready to check out, and she wants to make a payment.

How do you check Susie out? To check her out:

1 In the patient chart, click the **Patient Checkout** button.

**OR**

In the patient flow module, move the patient to the **Check Out** icon. The **Financial Functions—Charges and Payments** window is displayed.

2 In the **Procedures** section, type the procedure codes for this appointment or click **Enter Code or Click Here for List** to display the **Procedures** window, where you can select procedures to post.

Procedures that were performed today are displayed automatically if procedures have been scheduled with the appointment.

3 Enter a ledger comment by typing the comment in the **Procedures** section and pressing Tab.

4 Press the Tab or Enter key to move to the procedure **Amount** fields and change the amounts, if necessary. You can split amounts between patient and insurance, provided a carrier has been assigned to the patient, by typing the amount or percentage (/ or %).

5 In the **Payments** field, select a payment type from the list, type a payment reference number, and type the payment amount. Type the patient portion and the insurance company portion, if applicable.

6 Click the **Post Transactions** button or press Enter when the **Post Transactions** button is selected to post the charges and payments you have entered.

7 Click **Close** or press Enter when the **Close** button is selected. The **Appointment Summary** window is displayed.

8 Click **Schedule Appointment**. The **Schedule Appointment** calendar is displayed.

9 Click **Search**. The **Appointment Types** or **Procedure** window is displayed, depending on the search method you selected in the **Schedule Maintenance** window.

10 In the **Code** field, type the appointment type you want, or use the arrow buttons or scroll bar to move through the list of appointment types and select the appointment. Click **OK**. The **Appointment Search** window is displayed.

11 Scroll through the list of appointment times and select the specific **Time/Chair** to schedule.

12 Click **Schedule**. The **Appointment Details** window is displayed.

13 In the **Comment** field, type a comment if necessary.

14 Click **Procs**. The **Procedures** window is displayed. Select the procedures that will be performed during the appointment and click **OK**.

15 Click **Close** to close the **Schedule Appointment** calendar.

16 Click **Close** to close the **Appointment Summary** window. The **Print Appointment Ticket** window is displayed.

17 Select the options to print an appointment ticket, school excuse, or work excuse and click **Yes**.

18 Click the **Patient Lookup** button to close the patient chart.



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## Exercise 2—Check a Patient Out Using Information from the Charting Module

If your office uses the charting module, an assistant at chairside enters the next appointment date and the procedures that will be performed, and the information is displayed at checkout.

Paul Patient has come in for his regular adjustment appointment. To check him out using the charting module:

1 In the patient chart, click the **Patient Checkout** button.

**OR**

In the patient flow module, move the patient to the **Check Out** icon.

The **Financial Functions—Charges and Payments** window is displayed.

2 Procedures that were performed today are displayed automatically in the **Procedures** section. Enter any additional ledger comments by typing the comment in the **Procedures** section and pressing Tab.

3 Press the Tab or Enter key to move to the procedure **Amount** fields and change the amounts, if necessary. You can split amounts between patient and insurance, provided a carrier has been assigned to the patient, by typing the amount or percentage (/ or %).

4 In the **Payments** field, select a payment type from the list, type a payment reference number, and type the payment amount. Type the patient portion and the insurance company portion, if applicable.

5 Click the **Post Transactions** button or press Enter when the **Post Transactions** button is selected to post the charges and payments you have entered.

6 Click **Close** or press Enter when the **Close** button is selected. The **Appointment Summary** window is displayed.

7 Click **Schedule Appointment**. The procedures for the next appointment on the treatment card are displayed in the **Charting Information** window, along with the **Schedule Appointment** calendar.

8 Click **Search**. The **Appointment Types** or **Procedure** window is displayed, depending on the search method you selected in the **Schedule Maintenance** window.

In this example, the schedule is set up using appointment types.

9 In the **Code** field, type the appointment type you want, or use the arrow buttons or scroll bar to move through the list of appointment types and select the appointment. Click **OK**. The **Appointment Search** window is displayed.

10 Scroll through the list of appointment times and select the specific **Time/Chair** to schedule. Click **Schedule**. The **Appointment Details** window is displayed.

11 Click **Charting.** The window shows the details of the **Next Appointment** section of the patient's treatment card.

12 Click **Paste**.

13 Make any necessary changes to the new appointment information.



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14 Click **OK** to schedule the appointment. The software prompts you, asking if you would like to clear this information from the charting module. If this is a one-time appointment, click **Yes**. If this is an appointment type that is repeated (for example, Adjustment), click **No**. The appointment remains in the **Next Appointment** section of the treatment card and will not have to be re-typed for the next appointment.

15 Click **Close** to close the **Schedule Appointment** calendar.

16 Click **Close** to close the **Appointment Summary** window. The **Print Appointment Ticket** window is displayed.

17 Select the options to print an appointment ticket, school excuse, or work excuse and click **Yes**.

18 Click the **Patient Lookup** button to close the current patient chart.

### Exercise 3—Print a Payment Receipt

At the checkout desk, William Doe tells you he needs a receipt so he can be reimbursed from his flexible spending account. How do you print an individual receipt for William?

To print the payment receipt:

1 After you have checked William out, select **Reports > Receipt > Payment Receipt** in any of the financial functions windows in William's chart. The **Payment Receipts** window is displayed.

2 In the **Print Options** section, select the option for how the receipt should be printed.

3 In the **Date Range** section, type a date range from which to print the receipt, if desired.

4 Click **OK**.



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Lesson 9

# Using Financial Reports

This lesson includes:


- Processing the Daysheet on page 73
- Printing Month-To-Date Reports on page 76
- Using the Ledger Scan Report on page 76


The financial reports in the software enable you to keep track of your practice's financial data. The available reports include:

- Balancing Worksheet
- Selected Billing Types
- Statement Code/Late Charge
- Ledger Scan
- Coupon Books
- Contract Summary
- Revenue Projection
- Aged Receivables By
- Auto Payment
- Statements
- Daysheet
- Roll

The daysheet reports include:

- Process Daysheet
- Quick View Daysheet
- View Archived Daysheets
- MTD Daysheet Report

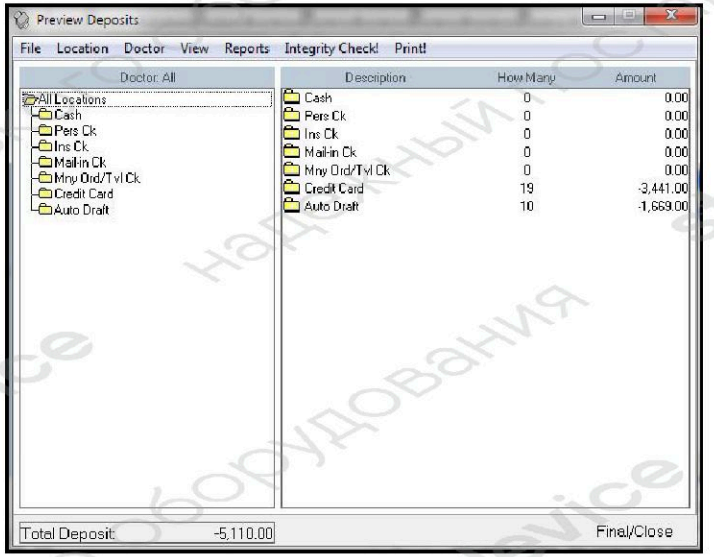
## Processing the Daysheet

**Important**

**Before you can run financial reports, you must convert your balances.**

The first step in closing the daysheet is to preview the transactions. To preview the Daysheet report:

1 On the main menu, select **Reports > Financial > Daysheet > Process Daysheet**. The **Preview Deposits** window is displayed.




2 To view the responsible party account names, on the left side of the window, click on the folder name for the payment type you want to view. The responsible parties are displayed in the upper-right side of the window.



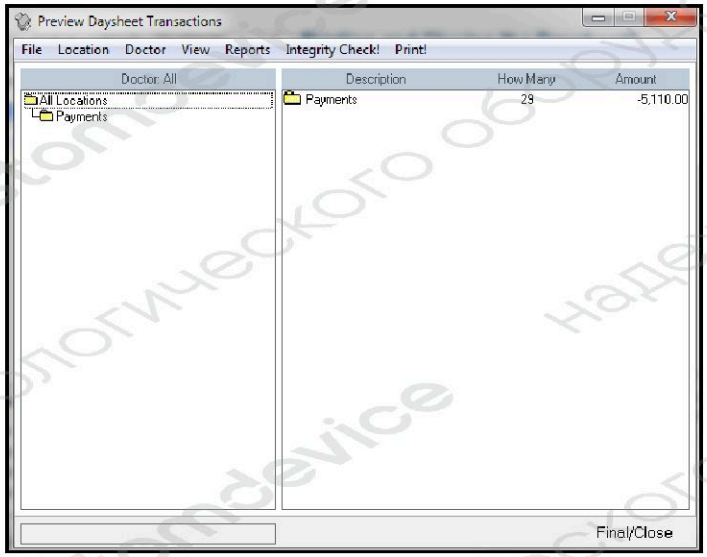
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**Note**

All of the daysheet reports print by default, unless you have configured the software to exclude specific reports.

3 To view other transactions, such as contracts, adjustments, and so on, click **View > Transactions** on the menu bar. The **Preview Daysheet Transactions** window is displayed.




4 To view the accounts for a particular category, double-click the appropriate folder on the left side of the window. If subcategories exist, a folder is displayed for each. Double-click the name of the subcategory folder to display the patient name, reference number, transaction amount, and location in the upper-right side of the window.

The total for the transaction category, including all subcategories, is displayed in the lower-right side of the window.

**Important**

**Verify that the daysheet printed properly.**

**Note**

If the Trial Balance is displayed in the daysheet header, the daysheet was not closed properly and must be printed again.

## Printing and Closing the Daysheet

If the deposit amounts match the payments and all transactions appear to be correct, you can print and close the daysheet. To print and close the daysheet:

1 Click **Reports** on the menu bar of the **Preview Deposits** window and confirm that **Close Daysheet** is selected.

The daysheet reports listed above **Close Daysheet** print automatically.

2 To print the final daysheet of the day, select **Print!** The software displays a message. Click **Yes**.

3 In the printer dialog box, verify that the correct printer is selected and click **OK**.

If the Integrity Check is intact and no problems are detected, the software displays a **Printout OK?** message, requesting you to confirm that the daysheet printed properly. Wait until the reports are printed, and make sure the control number prints in the header of all reports before answering this message.

If you click **Yes**, the daysheet closes, all transactions are removed from the daysheet, and daily totals are reset to zero.

If you click **No**, the transactions remain on the daysheet, and the daysheet is not closed (although the printout has a control number). The **Daysheet Preview** window is displayed again. After checking the printer for paper jams, orientation, and so on, select **Reports** on the menu bar and make certain **Close Daysheet** is selected before printing again.



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## Printing a Trial Balance Report

If you are not ready to close the daysheet but want a printed copy of a report:

1 Click **Reports** on the menu bar and deselect **Close Daysheet**.

2 Deselect the reports you do not want to print, and select the reports you want to print.

3 Click **Print!** The reports that print display **Trial Balance** in the upper-right corner of the header.

## Multi-Month Daysheet

When running a daysheet that contains transactions from multiple months, a message is displayed, stating that you need to run the **Daily Monitors** and **Totals Summary** reports after the daysheet has been closed.

Printing the **Daily Monitors** and **Totals Summary** pages of the daysheet separately after the current daysheet is closed prevents dollar amounts from transactions in previous months from being calculated and reported in the **Daily Monitors/This Month** row and in the **Totals Summary/Month-to-Date Totals** section.

To print the **Daily Monitors** and **Totals Summary** pages for a multi-month daysheet:

1 Before closing the daysheet, click **Reports** on the **Preview Deposits** menu bar and verify that **Daily Totals, Daily Monitors,** and **Totals Summary** are selected.

2 Close the daysheet. See "Printing and Closing the Daysheet" on page 74.

3 After closing the daysheet, return to the **Preview Deposits** window, select **Reports** on the menu bar, and verify that **Totals Summary** and **Daily Monitors** are selected.

4 Click **Print!**

## Viewing the Daysheet

The Quick View Daysheet report enables you to perform most of the same functions as Process Daysheet, but it does not calculate totals for each doctor and office. Several processes, including integrity check, daily totals, total summary, daily monitors, and close daysheet, are disabled.

The Quick View Daysheet option is helpful to practices with multiple offices, as satellite offices can use the option to verify their individual deposit/balance, while the main office closes the daysheet.

## Viewing Archived Daysheets

When the daysheet is closed, an archived daysheet is automatically generated.

To view archived daysheets:

1 From the main menu, select **Reports > Financial > Daysheet > View Archived Daysheets**. The **View Archived Daysheets** window is displayed.

2 Click the calendar buttons to select the date range.

3 Select the daysheet you want to view.

4 Click **View Daysheet**. A copy of the daysheet is displayed as a PDF file.



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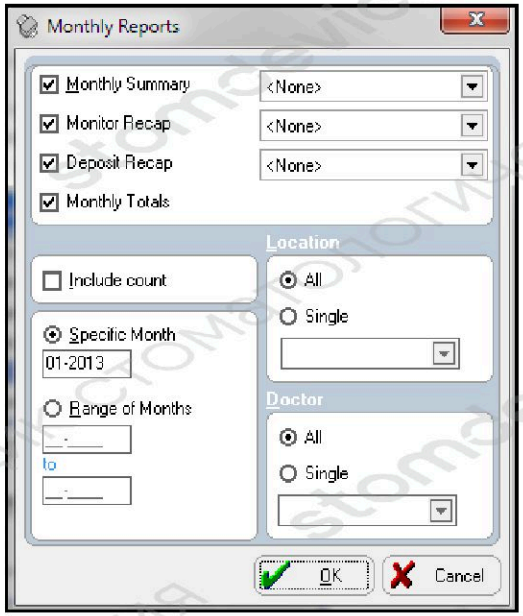
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## Printing Month-To-Date Reports

You can print monthly reports together or individually, with or without accompanying graphs. The Monthly Summary, Monitor Recap, and Deposit Recap reports display data for each day on which transactions were posted in the selected month. The Monthly Totals report corresponds to the Daily Totals page of the daysheet and contains amounts for each of the daysheet categories and related transaction types.

To print the monthly daysheet reports:

1 On the main menu, select **Reports > Financial > Daysheet > MTD Daysheet Report**. The **Monthly Reports** window is displayed.




2 Deselect the reports you do not want to print. When a report is selected, the graph box to the right of the report name is active. Use the drop-down list to select the type of graph to print with each report or select **<None>**.

3 Select **Include count** to print the number of transactions and the dollar amount for the transactions on the Monthly Summary, Monitor Recap, and Deposit Recap reports.

4 To change the **Specific Month** date, click in the field and type the month and year for the report.

Select **Range of Months** to enter a range of months for the report. Enter the dates in mm/yyyy format.

5 If your office has multiple locations, the **Location** section is enabled. Select **All** or **Single**. If you select **Single**, select the location from the drop-down list.

6 If your office has more than one doctor, the **Doctor** section is enabled. Select **All** or **Single**. If you select **Single**, select the doctor from the drop-down list.

7 Click **Print**. The **Financial Daysheet** print options window is displayed.

8 Select a print option and click **OK**.

## Using the Ledger Scan Report

The Ledger Scan report prints a list of ledger transactions and amounts for a specified time period by patient or responsible party. You can select the transaction types to print on the report and filter the report so it yields only transactions belonging to the patient's insurance, responsible party, or both.

You can also specify whether the report should be for all locations and all doctors, or a particular location or doctor. The report options can be saved for future use.

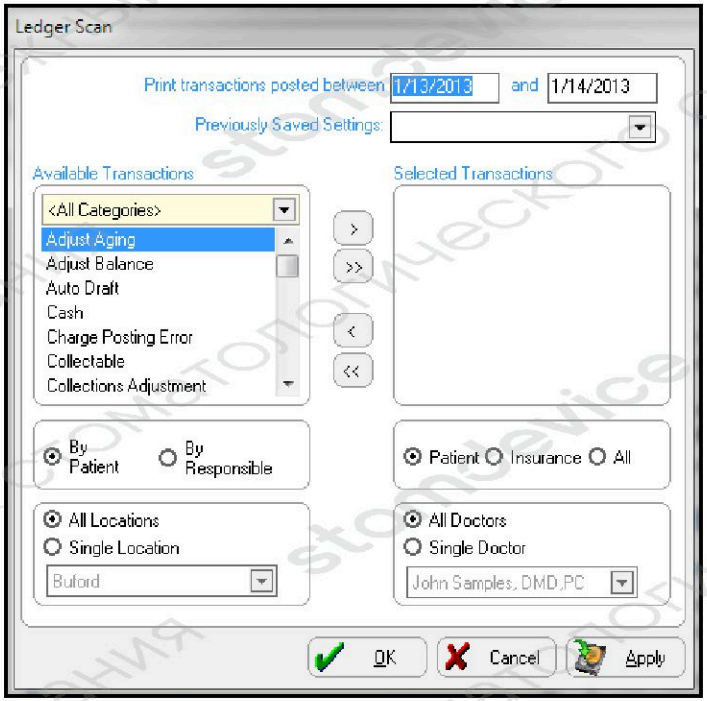


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To use the Ledger Scan report:

1 On the main menu, select **Reports > Financial > Ledger Scan**. The **Ledger Scan** window is displayed.




2 Type the dates for which you want a report in the fields at the top of the window.

3 In the **Available Transactions** section, select each transaction you want to include in the report by highlighting the transaction and clicking the single right-arrow button.

4 In the remaining sections, select whether you want to generate a report **By Patient** or **By Responsible**; for **All Locations** or a **Single Location**; for **Patient**, **Insurance**, or **All**; and for **All Doctors** or a **Single Doctor**.

5 Click **OK** and **Print**.

## Saving Ledger Scan Report Settings

After running a Ledger Scan report, you can save the settings to enable you to run the report in the future. To save the Ledger Scan report settings:

1 After running the report, click **Apply**. The **Save Options** window is displayed.

2 Type a name for the report in the field and click **OK**. The report name and settings are saved.

To run a report using the same settings, click the arrow next to the **Previously Saved Settings** field and select the report name from the list.



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## Skill Sharpeners

### Exercise 1—Print the Daysheet

At the end of a business day, you want to print and close the daysheet. To do so:

1 Click **Reports** on the menu bar of the **Preview Deposits** window and confirm that **Close Daysheet** is selected.

The daysheet reports listed above **Close Daysheet** print automatically.

2 To print the final daysheet of the day, select **Print!** The software displays a message. Click **Yes**.

3 In the printer dialog box, verify that the correct printer is selected and click **OK**.

If the integrity check is intact and no problems are detected, the software displays a **Printout OK?** message, requesting you to confirm that the daysheet printed properly. Wait until the reports are printed, and make sure the control number prints in the header of all reports before answering this message.

4 Click **Yes**. The daysheet closes, all transactions are removed from the daysheet, and daily totals are reset to zero.

### Exercise 2—View an Archived Daysheet

You need to view a daysheet from a past date. To view archived daysheets:

1 From the main menu, select **Reports > Financial > Daysheet > View Archived Daysheets**. The **View Archived Daysheets** window is displayed.

2 Select a date range and select the daysheet you want to view.

3 Click **View Daysheet**.



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Lesson 10

# Working with Contracts

This lesson includes:


- Setting Up a Contract on page 79
- Setting Up a Contract with Insurance or Multiple Responsible Parties on page 80


Use the contracts and payment plans function to set up your contracts, payment plans, visit charges, and monthly fees. You can enter a total contract balance and set up payments to be rolled in monthly, quarterly, semi-annually, or annually until treatment is completed. Production is updated as each charge is rolled in.

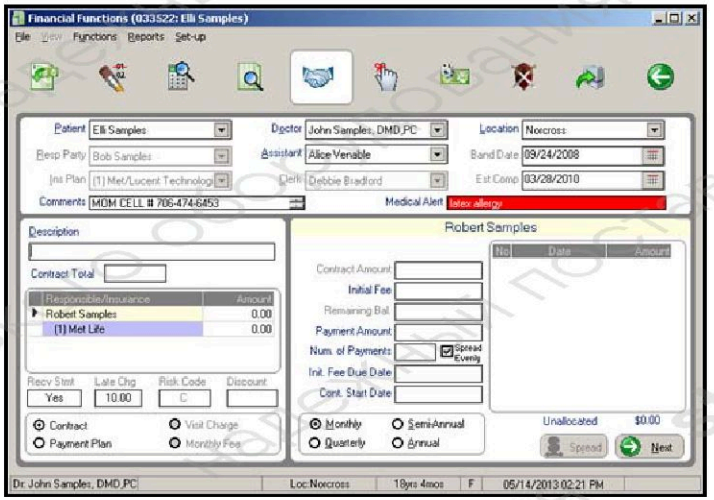
Payment plans function the same as contracts, but production figures are not updated each month. Payment plans are used for services that are produced in a single visit or to refinance delinquent accounts without duplicating production. The patient is able to spread payments over a period of time.

## Setting Up a Contract

To set up a contract:

1 In a patient chart, click the **Financial Functions** button. The **Financial Functions—Charges and Payments** window is displayed.

2 Click the **Contracts and Payment Plans** button. he **Financial Functions—Contracts and Payment Plans** window is displayed.




3 In the **Description** field, select a contract description from the drop-down menu or add a new description. Press Tab.

4 In the **Contract Total** field, type the full contract amount before discounts, which includes the responsible party portion and insurance carrier portion, if applicable. Press Tab.

The total contract amount is displayed next to the first responsible party listed in the **Responsible/Insurance** section. If the first responsible party is paying the entire contract amount, press Tab again.

**Important**

**Before you can work with contracts, you must convert your balances.**

**Note**

If you make a mistake while entering contract information, click **Restart** and enter the information again.



**Financial Functions**



**Contracts and Payment Plans**



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Post Transactions

5 In the **Initial Fee** field, type the amount of the contract that is due on the initial fee due date. Press Tab.

6 In the **Payment Amount** field, type the payment amount to be paid monthly, quarterly, semi-annually, or annually. Press Tab.

The software calculates the payment amount if you leave this field blank and enter the total number of payments in the **Num. of Payments** field.

7 In the **Num. of Payments** field, type the number of payments. Press Tab.

8 In the **Init. Fee Due Date** field, type the date the initial fee is due. Press Tab.



Financial Functions

The initial fee due date determines when a contract becomes active. If you use the current date, the contract is activated, and the initial fee amount is applied to the current balance when you post the contract. If you use a date in the future, the status of the contract is Pending.



Contracts and Payment Plans

9 In the **Start Date** field, type the date that the first contract charge should be applied. In a single-due-date system, the date defaults to the roll date for the next month. In a multi-due-date system, the date defaults to one month from the initial fee due date.

To use the default payment term of **Allow only 1 Charge per Month**, press Tab. The **Spread** button is selected. Press Tab. The **Post Transactions** button is selected.

**OR**

To use a different payment term for the contract, select a new payment term. Press Tab. The cursor immediately moves to the **Post Transactions** button.

10 Type a description.

11 Press Enter or click the **Post Transactions** button. If you have not entered a banding date, the **Contract** message is displayed.

12 To enter a banding date, click the **calendar** next to the **Start Date** field and select a date, or type the date in the field.

13 To enter an estimated completion date, click the **calendar** next to the **Est Comp** field and select a date, or type the date in the field.

## Setting Up a Contract with Insurance or Multiple Responsible Parties

To set up a contract with insurance or multiple responsible parties:

1 In the patient chart, click the **Financial Functions** button. The **Financial Functions—Charges and Payments** window is displayed.

2 Click the **Contracts and Payment Plans** button. The **Financial Functions—Contracts and Payment Plans** window is displayed.

3 In the **Description** field, select a contract description from the drop-down menu or add a new description. Press Tab.

4 In the **Contract Total** field, type the full contract amount before discounts, which includes the responsible party portion and insurance carrier portion, if applicable. Press Tab.

5 In the **Amount** section, type the portion of the contract the first responsible party is paying. Press Tab.

If there are additional responsible parties/insurance carriers that the contract should be divided between, type the amount each is paying until the total contract amount is disbursed.



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If a particular responsible party should not be included in the contract disbursement, type **0** and press Enter to skip the responsible party and to continue disbursing money to the next responsible party. Press Tab.

6 Select whether this is a **Contract** or **Payment Plan**. Press Tab.

7 In the **Initial Fee** field, type the amount of the contract that is due on the initial fee due date. Press Tab.

8 In the **Payment Amount** field, type the payment amount to be paid monthly, quarterly, semi-annually, or annually. Press Tab.

The software calculates the payment amount if you leave this field blank and enter the total number of payments in the **Num. of Payments** field.

9 In the **Num. of Payments** field, type the number of payments. Press Tab.

10 In the **Init. Fee Due Date** field, type the date the initial fee is due. Press Tab.

The initial fee due date determines when a contract becomes active. If you use the current date, the contract is activated, and the initial fee amount is applied to the current balance when you post the contract. If you use a date in the future, the status of the contract is Pending.

11 In the **Cont. Start Date** field, type the date that the first contract charge should be applied. In a single-due-date system, the date defaults to the roll date for the next month. In a multi-due-date system, the date defaults to one month from the initial fee due date.

To use the default payment term of **Monthly**, press Tab. The **Spread** button is selected. Press Tab. The **Next** button is selected.

**OR**

To use a different payment term for the contract, select a new payment term. Press Tab. The **Next** button is selected.

12 Click **Next** or press Tab to continue setting up the contract for the next responsible party/insurance carrier.

Continue completing contract information for all responsible parties/insurance carriers on the list. If a responsible party is listed but does not require a contract, tab through the contract fields until the software displays a message acknowledging that the responsible party being skipped does not have a financial contract.

13 After completing the payment information for the last responsible party/insurance carrier in the **Responsible/Insurance** section, the **Post Transactions** button is selected. Click the **Post Transactions** button or press Tab. If you have not entered a banding date, the **Contract** message is displayed.

14 To enter a banding date, click the **calendar** next to the **Start Date** field and select a date.

To enter an estimated completion date, click the **calendar** next to the **Est Comp** field and select a date.

**Note**

Pending contracts are activated by changing the initial fee date, posting a procedure that has been designated to activate a contract, or by the roll program.

**Tip**

If you make a mistake while entering contract information, click **Restart** and enter the information again.

**Note**

You cannot enter a past date as an initial fee due date.



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## Skill Sharpeners

### Exercise 1—Set Up a Contract

Patti Patient is ready to begin treatment. She is self-responsible and does not have insurance. How do you set up her contract?

To set up a contract:

1 In the patient chart, click the **Financial Functions** button. The **Financial Functions—Charges and Payments** window is displayed.

2 Click the **Contracts and Payment Plans** button. The **Financial Functions—Contracts and Payment Plans** window is displayed.

3 In the **Description** field, select a contract description from the drop-down menu or add a new description. Press Tab.

4 In the **Contract Total** field, enter the full contract amount before discounts. Press Tab.

5 The total contract amount is displayed next to the first responsible party listed in the **Responsible/Insurance** section. Since the first responsible party is paying the entire contract amount, press Tab.

6 In the **Initial Fee** field, enter the amount of the contract that is due on the initial fee due date. Press Tab.

7 In the **Payment Amount** field, enter the payment amount to be paid monthly, quarterly, semi-annually, or annually. Press Tab.

The software calculates the payment amount if you leave this field blank and enter the total number of payments in the **Num. of Payments** field.

8 In the **Num. of Payments** field, type the number of payments. Press Tab. If you entered a payment amount, the software calculates the number of payments.

9 In the **Init. Fee Due Date** field, type the date the initial fee is due to be paid. Press Tab.

10 In the **Cont. Start Date** field, type the date that the first contract charge should be applied. In a single-due-date system, the date defaults to the roll date for the next month. In a multi-due-date system, the date defaults to one month from the initial fee due date.

If you want to accept the default payment term of **Monthly**, press Tab. The **Spread** button is selected. Press Tab. The **Post Transactions** button is selected.

**OR**

If you need to select a different payment term for the contract, while still in the **Cont. Start Date** field, select a new payment term. Press Tab. The cursor immediately moves to the **Post Transactions** button.

11 Click the **Post Transactions** button or press Tab. If you have not entered a banding date, the **Contract** message is displayed.

12 To enter a banding date, click **Yes** and type the date in the field. To enter an estimated completion date, click **Yes** and type the date in the field.

13 Click the **Close** button.



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## Exercise 2—Set Up a Split Contract

John Doe is starting treatment, and part of the cost will be paid by his father's insurance. How do you set up his contract so the total amount is split between the insurance company and the responsible party?

To enter a contract with insurance or with multiple responsible parties:

1 In the patient chart, click the **Financial Functions** button. The **Financial Functions—Charges and Payments** window is displayed.

2 Click the **Contracts and Payment Plans** button. The **Financial Functions—Contracts and Payment Plans** window is displayed.

3 In the **Description** field, select a contract description from the drop-down menu or add a new description. Press Tab.

4 In the **Contract Total** field, enter the full contract amount before discounts (includes the responsible party portion and insurance carrier portion, if applicable). Press Tab.

5 Type the portion of the contract the first responsible party is paying. Press Tab.

The remaining portion of the contract is displayed on the next line of the **Responsible/Insurance Amount** section, and an arrow points to the next name in the **Responsible/Insurance** section. Press Tab.

6 In the **Initial Fee** field, enter the amount of the contract that is due on the initial fee due date. Press Tab.

7 In the **Payment Amount** field, enter the payment amount to be paid monthly, quarterly, semi-annually, or annually. Press Tab.

The software calculates the payment amount if you leave this field blank and enter the total number of payments in the **Num. of Payments** field.

8 In the **Num. of Payments** field, enter the number of payments. Press Tab.

If you entered a payment amount, the software calculates the number of payments.

9 In the **Init. Fee Due Date** field, type the date the initial fee is due to be paid. Press Tab.

10 In the **Cont. Start Date** field, type the date that the first contract charge should be applied. In a single-due-date system, the date defaults to the roll date for the next month. In a multi-due-date system, the date defaults to one month from the initial fee due date.

To accept the default payment term of **Monthly**, press Tab. The **Spread** button is selected. Press Tab. The **Next** button is selected.

**OR**

To select a different payment term for the contract, in the **Cont. Start Date** field select a new payment term. Press Tab. The **Next** button is selected.

11 Click **Next** or press Tab to continue setting up the contract for the next responsible party/insurance carrier. Continue adding information for all responsible parties/insurance carriers on the list. If a responsible party is listed but does not require a contract, press Tab to move through the contract fields until the software displays a message, acknowledging that the responsible party being skipped does not have a financial contract.



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12 After completing the payment information for the last responsible party/insurance carrier in the **Responsible/Insurance** section, the **Post Transactions** button is selected. Click the **Post Transactions** button or press Tab. If you have not entered a banding date, the **Contract** message is displayed.

13 To enter a banding date, click **Yes** and type the date in the field.

To enter an estimated completion date, click **Yes** and type the date in the field.

### Exercise 3—Set Up a Contract with Varying Monthly Charge Amounts

A patient without insurance is starting treatment for a total of $3,500. The patient wants to make an initial payment of $500, monthly payments of $100.00 for the first six months, $125.00 for the next six months, $150.00 for the next six months, and a final balloon payment for the remaining balance. How do you set up this contract?

To set up a contract with varying charge amounts:

1 In the patient chart, click the **Financial Functions** button. The **Financial Functions—Charges and Payments** window is displayed.

2 Click the **Contracts and Payment Plans** button. The **Financial Functions—Contracts and Payment Plans** window is displayed.

3 In the **Description** field, type a contract description. Press Tab.

4 In the **Contract Total** field, type **$3,500**. Press Tab.

5 An arrow is displayed next to the patient's name in the **Responsible/Insurance** section, and the total amount of the contract is displayed on the first line of the **Amount** section. Press Tab.

6 In the **Initial Fee** field, type **$500**. Press Tab.

7 In the **Payment Amount** field, type **$100.00** and press Tab. Disregard the **Num. of Payments** field, as the software calculates the number of payments as if you were paying off the contract using only this initial amount.

8 Press Tab and retype the contract start date, if needed.

9 Deselect the **Spread Evenly** option.

10 In the payment grid, scroll to the seventh payment of the contract, click in the **Amount** field, and type **$125.00**. Press Tab.

11 Click **Spread**.

12 In the payment grid, scroll to the thirteenth payment of the contract, click in the **Amount** field, and type **$150.00**. Press Tab.

13 Click **Spread**.

14 In the payment grid, scroll to the nineteenth payment of the contract, click in the **Amount** field, and type **$750.00**. Press Tab.

15 Click **Spread**.

16 Click the **Post Transactions** button or press Tab. If you have not entered a banding date, the **Contract** message is displayed.



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17 To enter a banding date, click **Yes** and type the date in the field. To enter an estimated completion date, click **Yes** and type the date in the field.

18 Click the **Close** button.

### Exercise 4—Print a Coupon Book

A patient tells you that he has lost his coupon book. How can you print a new one for him?

To reprint an entire coupon book:

1 In the patient's chart, click the **Financial Functions** button. The **Financial Functions—Charges and Payments** window is displayed.

2 On the menu bar, select **Reports > Contracts and Payment Plans > Coupons**. The **Print Setup** window is displayed.

3 Select the printer on which to print the coupon book, if necessary.

4 Click **OK**.

To reprint a coupon book for future payments only:

5 On the main menu, select **Reports > Financial > Coupon Books**. The **Coupon Books** window is displayed.

6 Select **Reprint coupon books**, **Reprint for future payments**, and click **OK**. The **Select Patient to Print Coupons** window is displayed.

7 Select the patient name and click **OK**. The **Print Setup** window is displayed.

8 Select the printer on which to print the coupon book, if necessary.

9 Click **OK**.

10 Deselect the **Spread Evenly** option.

11 In the payment grid, scroll to the seventh payment of the contract, click in the **Amount** field, and type **$125.00**. Press Tab.

12 Click **Spread**.

13 In the payment grid, scroll to the thirteenth payment of the contract, click in the **Amount** field, and type **$150.00**. Press Tab.

14 Click **Spread**.

15 In the payment grid, scroll to the nineteenth payment of the contract, click in the **Amount** field, and type **$750.00**. Press Tab.

16 Click **Spread**.

17 Click the **Post Transactions** button or press Tab. If you have not entered a banding date, the **Contract** message is displayed.

18 To enter a banding date, click **Yes** and type the date in the field.

To enter an estimated completion date, click **Yes** and type the date in the field.

19 Click the **Close** button.



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Lesson 11

# Working with Auto Payments

This lesson includes:


- Setting Up Auto Payments on page 87
- Editing Auto Payment Records on page 88

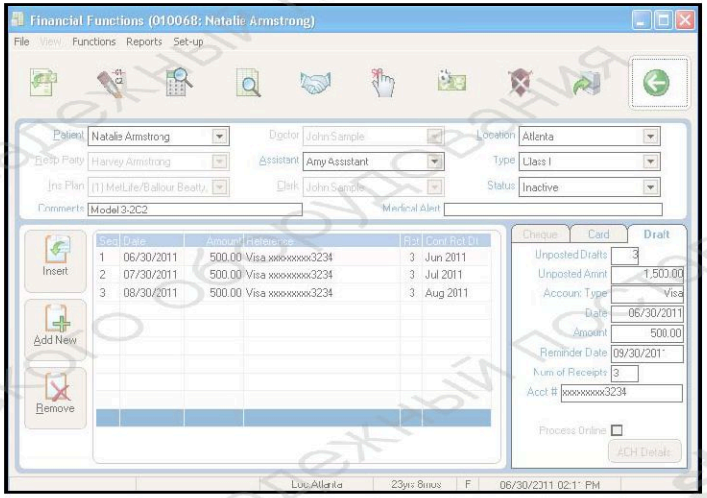

The automatic payments feature enables you to enter credit card drafts, electronic bank drafts, or post-dated cheques to be posted at regular intervals in the future. After you set up the auto payment information in the patients' financial charts, the software can automatically post these payments to their financial ledgers on a daily basis.

## Setting Up Auto Payments

To set up automatic payments:

1 In the patient chart, click the **Financial Functions** button. The **Financial Functions–Charges and Payments** window is displayed.

2 Click the **Auto Payments** button. The **Financial Functions–Auto Payments** window is displayed.




3 Click a tab to select the type of automatic payment you want. Type additional information in the blank fields.

The following fields require explanation:

- **Starting Pmt Mth**–This is the treatment month to which the payment is allocated. This is used most often in Canada for insurance receipt purposes, when the payment can be a month ahead or behind the treatment. Otherwise, enter the same month indicated in the previous field, **First Payment Due**.
- **Reminder Date**–This is used when the entire contract amount is not covered by the auto payments. The reminder date defaults to the month and year after the last

**Important**

**Before you can work with auto payments, you must convert your balances.**



**Financial Functions**



**Auto Payments**



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**Important**

**The bank account number is not a required field. Be sure to consider security and confidentiality issues when entering this data.**



**Post Transactions**

payment entered. This is useful when a credit card expires before the end of the payments, so the responsible party must be contacted for the current credit card information.

- **Receipts**–If the patient/responsible party needs more than one receipt per payment, enter the number of receipts needed here. Receipts can be printed after the payment is posted on the appropriate date.

On the **Cheque** tab, complete the following fields:

- **Starting Cheque #**–Type the number of the first cheque.
- **Acct #**–Type the bank account number or the name of the financial institution.

On the **Credit Card** tab, complete the following fields:

- **Type of Card**–Type the name of the credit card.
- **Acct #**–Type the entire credit card account number. If you use the credit card service, the **OrthoTrac Software Credit Card Processing Capture Credit Card** window is displayed when you enter this field. If a card reader is connected to the computer, swipe the credit card. When you save the information, all digits except the last four are replaced with an x as a security measure. Click **OK**.
- **Expiration Date**–Type the month and year the credit card expires. This field is completed in the **OrthoTrac Software Credit Card Processing Capture Credit Card** window, if you are using the credit card service.
- **Process Online**–Select this to have the credit card processing module contact the service center to obtain authorization when you post auto payments.
- **Last Card**–If the account has a previously authorized credit card on file, click **Last Card** to populate the **Acct #**, **Exp Date**, and **Reference** fields.

On the **Draft** tab, complete the following fields:

- **Account Type**–Enter the bank account type.
- **Acct #**–Type the bank account number or the name of the financial institution.

4 After completing the fields on the tab, click the **Post Transactions** button.

If the amount that is automatically calculated exceeds the total balance, a message is displayed, asking if you want to do this. Click **Yes**, but then edit the last payment to match the contract payment spread.

## Editing Auto Payment Records

Using the **Financial Functions–Auto Payments** window, you can change the amount of a payment, insert additional payments within the existing payment schedule, and add payments to the end of the existing payments.

### Changing an Auto Payment

To change existing auto payment information:

1 Double-click the payment you want to change in the **Amount** column of the auto payment grid.

2 Enter the new payment amount and press Tab or Enter. A message is displayed, asking if you want to make this change for all future payments.

3 Click **OK**.



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## Inserting an Auto Payment in the Schedule

To insert an additional auto payment in the existing payment schedule:

1 In the **Sequence** column, select the auto payment on the list that you want to display *after* the new auto payment and click **Insert**.

2 Enter the new payment information. As you are changing the fields, several messages are displayed, asking you if you want to make this change for all future payments.

3 Press Tab or Enter when finished.

## Adding an Auto Payment to the End of the Schedule

To add an auto payment to the end of existing payments:

1 Click **Add New**. A window is displayed on top of the grid.

2 Enter the additional payment information and click **OK**.

## Removing an Auto Payment

To remove an auto payment:

1 In the **Sequence** column, click the number of the payment you want to remove to select the payment. Payments that have already been posted cannot be removed individually.

2 Click **Remove**.

A message might be displayed, warning you that the account is set up to be debited for a greater amount than what is owed.

**Note**

Payments that have already been posted cannot be removed individually.



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## Skill Sharpeners

### Exercise 1—Create an Auto Payment

Patti Patient has a treatment plan and asks to set up an auto payment plan. How do you set it up for her?

1 In Patti's chart, click the **Financial Functions** button. The **Financial Functions—Charges and Payments** window is displayed.

2 Click the **Auto Payments** button. The **Financial Functions—Auto Payments** window is displayed.

3 Click a tab to select the type of auto payment you want to set up. Type information in the fields.

4 After completing the fields on the tab, click the **Post Transactions** button.

If the amount that is calculated exceeds the total balance, a message is displayed, asking if you want to do this. Click **Yes**, but then manually edit the last payment to match the contract payment spread.

### Exercise 2—Change an Auto Payment

To change an auto payment:

1 Double-click the payment you want to change in the **Amount** column of the auto payment grid.

2 Enter the new payment amount and press Tab or Enter. A message is displayed, asking you if you want to make this change for all future payments.

3 Click **OK**.



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Lesson 12

# Working with the Charting Module

This lesson includes:


- Tx Card Tab on page 91
- ToothChart Tab on page 95
- Questionnaire Tab on page 97
- Notes Tab on page 97
- Imaging Tab on page 98
- TxPlan Tab on page 98
- Searching Treatment Card Histories on page 102
- Printing Reports on page 103


The OrthoTrac charting module is an electronic chart containing treatment plans, treatment history information, and questionnaires for each patient. When combined with orthodontic imaging software, the patient's entire chart is available at chairside.

Using the charting module, you can:

- Enter or edit any part of today's treatment history.
- Store and display information about medical alerts, progress reviews, and the next appointment for a patient.
- Print treatment card reports.

You can set predefined views within charting that can apply to all workstations or an individual workstation. You can also use the classic view, if you prefer the original look of the treatment card.

To access a patient's treatment card:

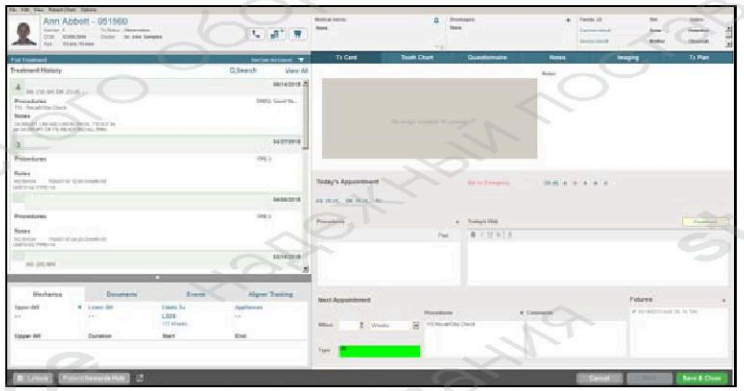
1 Open a patient's chart. Patient information is displayed.

2 Click the **Charting** button.



**Charting**

3 Select **Edit Charting**. The **Charting** window is displayed.The **Tx Card** is the active tab.



## Tx Card Tab

When you open the treatment card, patient information is displayed in the top section:

- Birthday
- Age
- Gender
- Dentist
- Tx Status

**Note**

In version 14.0, set your screen resolution to 1440 x 900 to fully display the **Treament Card** window.

**Tip**

When the charting module is open for a patient, an **i** icon is displayed on the **ToothChart**, **TxPlan**, **Questionnaire**, or **Notes** tabs if the tab contains patient information.

**Note**

In addition to the patient's birth date, the **Happy Birthday** indicator is displayed during the month of the patient's birthday.



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**Note**

Offices using the Zuelke Financial Module see only the **Full Treatment** tab so that all reports work properly.

## Patient Insight Panel

On the Treatment Card, below patient information, is a drop-down arrow. Click this arrow to display the **Patient Insight** panel, which provides an overview of treatment progress.

The **Patient Insight** panel includes these tabs:

- **Phase I**
  - **Start date**
  - **Estimated completion date**
  - **Completion date**
  - **No Show appointments**
  - **Cancelled appointments**
  - **Changed appointments**
  - **Broken brackets**
  - **Wires**
  - **Lost appliances**
  - **Notes**
- **Monitoring**
  - **Start date**
  - **End date**
  - **Notes**
  - **Recall appointment**
  - **Recall schedule (3 months, 6 months, 12 months, others, and alpha)**
  - **Recall type**
  - **Comments**

  To add a patient's recall, click **Add Recall**.
- **Full Treatment**
  - **Start date**
  - **Estimated completion date**
  - **Completion date**
  - **No Show appointments**
  - **Cancelled appointments**
  - **Changed appointments**
  - **Broken brackets**
  - **Wires**
  - **Lost appliances**
  - **Notes**

## Treatment History

The **Treatment History** section includes these column headings:

- **#**–Displays the sequence number of each entry. Comments and optional Patient Tracking data are not numbered.
- **Date**–The date that the treatment card entry was made.
- **AS**–Assistant. This field is automatically populated, based on the staff member logged in, or when you select **Edit Treatment Card** and assign an assistant. To change assistants, click on the field.
- **DR**–Doctor. This field is automatically updated when you select **Edit Treatment Card**. To change doctors, click on the field.
- **TC**–Treatment Coordinator. This field is optional and is automatically populated, based on the TC assigned to the patient, or when you select **Edit Treatment Card** and assign an TC. To change the TC, click on the field.
- **OH**–Oral hygiene. This column enables the office to track a patient's hygiene habits throughout treatment. A list of oral hygiene codes is provided.
- **Procedures**– Displays the procedure codes performed during this treatment visit.



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- **Treatment Notes/Comments**–Displays the procedure code descriptions. Additional notes or comments are displayed after the procedures.
- **MA**–Medical alert. After you acknowledge the medical alert, this column is displayed.
- **Late/Early**–Displayed only if you enabled patient flow.

## Mechanics/Documents/Events/Aligner Tracking Tabs

Below the treatment history are tabs that enable you to view details about the treatment, show documents and events, and use aligner tracking.

### Mechanics Tab

Click the **Mechanics** tab to see details about the treatment.

### Documents Tab

Click the **Documents** tab to see a list of documents attached to the patient.

### Events Tab

Click the **Events** tab to see the following data from the **Patient Information** window: start date, estimated completion date, appointment information, referrals, doctor, model number, and last review.

### Aligner Tracking Tab

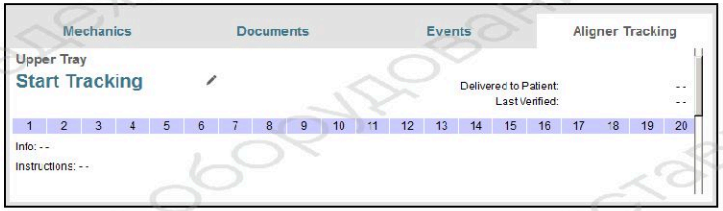
Click the **Aligner Tracker** tab to view upper and lower aligner tray information for a patient. By default, 20 trays are displayed.

The **Original Series** section of the **Aligner Tracking** tab estimates which tray the patient is using, based on the date and instructions. Aligner Tracking calculates when the last aligner tray was started and counts days relative to the system date. Each time the threshold for wearing the tray is met, the status is displayed for that aligner tray.

The tray that the patient is currently using is displayed in yellow. After the tray is verified, the label color changes to dark green.

To edit aligner tracking information:

1 In the **Aligner Tracking** area, click the **pencil** icon. The **Edit Aligner** window is displayed.




2 Specify aligner options:

- **Is This a Refinement**–Select **Yes** or **No** to indicate whether this aligner tray is a refinement. If **Yes** is selected, the **Refinement #** field becomes available. Select **1**, **2**, or **3** from the drop-down box.
- **Start Date**–Type the start date for the aligner tray or click the calendar icon and select a date.
- **# of Aligners**–Select the number of aligner trays that will be used from the drop-down box. By default, 20 trays are indicated.
- **Brand**–Select the brand of the aligner tray being used for treatment from the drop-down box.
- **Delivered to Patient**–Type the range of days that this aligner tray will be worn by the patient.
- **Usage**–Select **Full Time** or **Part Time** to indicate whether the aligner tray will be worn by the patient all the



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time or for a shorter amount of time designated by the doctor.

- **Changing Trays**–Select the day interval for changing trays from the drop-down box.
- **Instructions / Notes**–Type additional treatment instructions and information.

3 Click **Apply**.

**Important**

**Add procedure codes from the main treatment card, not in the Edit Today's Treatment Card Entries window.**

## Appointment Information

On the right of the treatment card, you can view information about the current appointment in the **Today's Appointment** section.

### Using the Next Appointment Section

In the **Next Appointment** section, you can enter and store information about the patient's next appointment. This information is passed to the front desk when a patient is checked out.

If the patient has an active treatment plan, the next appointment as defined in the treatment plan is displayed.

To enter the next appointment for a patient:

1 In the **When** field, select when the next appointment should be scheduled (**Days**, **Weeks**, or **Months**). Tab to the next field and enter the number of days, weeks, or months.

2 Click in the **Type** field. The **Appointment Types** window is displayed. Select the appointment type for the patient's next appointment and click **OK**.

3 In the **Comment** field, enter a comment, if necessary.

4 Click in the **Procedures** field or press Enter. The **Procedures** window is displayed. Double-click the procedures to be performed at the next appointment.

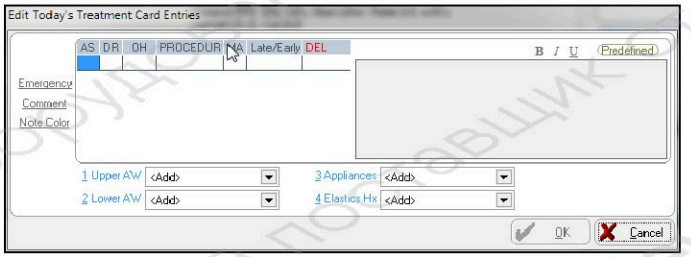
5 Click **OK**.

### Editing Today's Treatment Card Entries

You can edit treatment card data only on the day it is entered. The fields that can be changed include **AS**, **DR**, **TC**, **OH**, **PROCEDURES**, and **TREATMENT NOTES/COMMENTS**.

To make changes to today's treatment data:

1 In the patient's treatment card, select **Edit > Edit Today's Treatment**. The **Edit Today's Treatment Card Entries** window is displayed.




2 Select your option:

- To delete the procedure codes and treatment notes/comments in a line, click in the **DEL** column.
- To delete individual procedure codes, click once in the **PROCEDURES** column. The **Procedures** window is displayed. In the **Selected Procedures** section, select the procedure you want to remove and click the arrow button. Click **OK**.
- To delete or change the text in the **TREATMENT NOTES/COMMENTS** column, select the text and make the changes. To add additional text, click in the blank line at the bottom of the window and type the text.

3 Click **OK**.



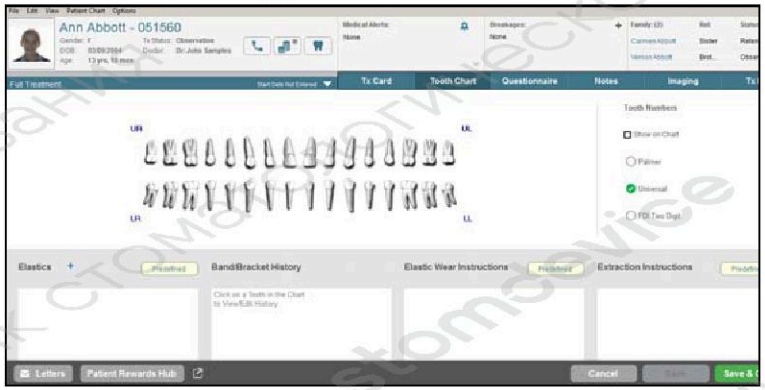
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## ToothChart Tab

Use the **ToothChart** tab to enter a list of elastics currently used for a patient, as well as a graphic representation of the elastic placement. You can designate teeth as primary, permanent, or extracted; enter band and bracket history; and track arch wires, appliances, and so on.

To display the tooth chart, click the **ToothChart** tab.




## Using Tooth Numbering

You can select the **Palmer**, **Universal**, or **FDI Two-Digit** numbering system when using the tooth chart. This setting is per workstation and must be set on each computer.

In the **Tooth Numbers** section, select the appropriate option. When you hover over a tooth with the cursor, the tooth is shaded, and the tooth number is displayed at the center of the tooth chart. If you select **Show On Chart**, the description of the tooth is displayed with the tooth number.

## Changing the Tooth Display

When you open the tooth chart for the first time, all teeth are displayed as permanent. You can right-click on a tooth to view a list of tooth display options. Using the options on the menu, you can change a permanent tooth to a primary tooth or indicate that a tooth was extracted or missing. You can also indicate whether a tooth has a crown or is an implant.

To change a tooth:

1 Move the cursor over the tooth you want to change and right-click on it. A menu is displayed.

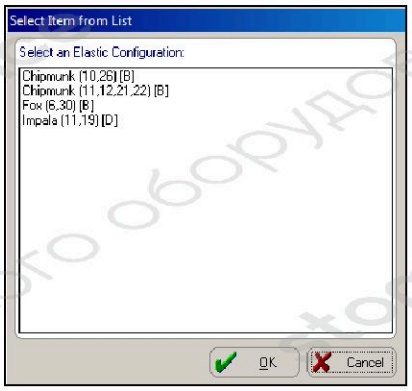
2 Select the appropriate option.

## Adding Elastics

You can enter information about elastic type, location, and the times elastics should be worn.

To add elastics for a patient:

1 In the **Elastics** section, click **Predefined**. The **Select Item from List** window is displayed.






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2 Select an elastic option from the list and click **OK**. The patient chart is displayed.

The software displays a message if you attempt to apply a predefined configuration to a patient that is missing a required tooth.

3 In the **Elastics** section, use the drop-down list in the **Type** field to select the elastic type.

4 Select an option button for the times the elastics are to be worn.

5 Select the starting tooth and click the left mouse button.

6 Move the cursor to the tooth to which the elastic connects and click the left mouse button.

7 Click **OK**.

8 Click **Apply** on the **ToothChart** tab.

## Adding Bands and Brackets

You can enter information about the types and sizes of brackets and bands you installed in the **Band/Bracket History** section.

To add brackets or bands to the tooth chart:

1 Select the tooth to which you want to attach a band or bracket.

2 In the **Band/Bracket History** section, click +. The Band/Bracket History window is displayed.

3 Select the band/bracket size and click **OK**.

4 Click **Apply**.

### Adding Elastic Wear Instructions and Extraction Instructions

You can include information about elastic wear and extractions in the sections at the bottom of the tooth chart.

Elastic wear instructions that you type in the **Elastic Wear Instructions** section are printed on the tooth chart. These instructions are also displayed in letters when you use the **<<ElasticWearInstructions>>** merge field.

Instructions that you type in the **Extraction Instructions** section are printed on the tooth chart. These instructions are also displayed in letters when you use the **<<ExtractionInstructions>>** merge field.

To enter elastic wear or extraction instructions:

1 Click in the **Elastic Wear Instructions** or **Extraction Instructions** section and type the instructions, or click the **Predefined** button to select from a list of predefined comments.

2 To mark a tooth for extraction, right-click on the tooth and select **Extract**. The **Extraction Instructions** are displayed automatically when a tooth is marked for extraction

3 Click **OK**.



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## Questionnaire Tab

The **Questionnaire** tab enables you to access the communications questionnaires used in the OrthoTrac communications module.

To use communications questionnaires in the charting module:

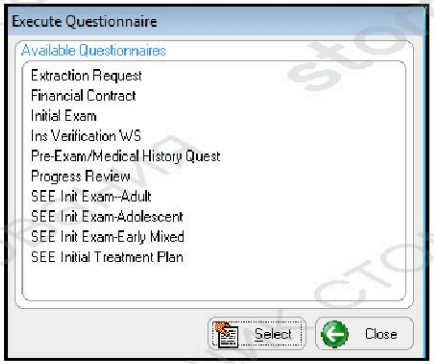
1 In the **Treatment Card** window, click the **Questionnaire** tab.

2 To view previous questionnaires for this patient, use the drop-down list in the **Completed Questionnaires** field.

**OR**

To execute a new questionnaire, click **Execute Questionnaire**.

The **Execute Questionnaire** window is displayed.




3 Select the questionnaire you want to work with and click **Select**.

## Notes Tab

The **Notes** tab enables you to enter and view notes about a patient's treatment plan. Use the formatting bar to manipulate the text and change the font, size, text color, and other formatting.

To save your notes, click **Save**. To save your notes and close the view, click **Save and Close**. To cancel your changes, click **Cancel**.

Information entered on the **Notes** tab is saved when you click **OK** to close the charting module.

You can use shortcuts when entering notes:

- If you type a forward slash (**/**), a comment code, and press the spacebar, the software displays the entire comment.

  **Example:** Type **/T11** and press the spacebar on the **Notes** tab. The software displays **Fixed appliance therapy** in the notes.
- You can type forward slash (**/**), question mark (**?**), and space to display a list of predefined comments. Click the **Predefined** button to display the same list of comments. Select a comment and click **OK** to place the comment in the notes.
- Add date, time, and staff member information by using the **Edit** menu or a shortcut key. To add these options to your notes, position your cursor where you want to insert the option and press the corresponding shortcut key:
  - Date–F5
  - Date/Time–F6
  - Staff Name–F7
  - Staff Name/Date–F8

**Note**

To view completed questionnaires in list format, select **Maintenance/Set-up > Charting Maintenance > Show Completed Questionnaires in list format**.



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- Change the formatting of note text using these keyboard shortcuts.
  - Align Left–Ctrl+L
  - Align Center–Ctrl+E
  - Align Right–Ctrl+R
  - Font Name–Ctrl+N
  - Font Size–Ctrl+S
  - Font Color–Ctrl+F

## Imaging Tab

If you purchased CS Orthodontic Imaging software, the **Imaging** tab is displayed. To open the orthodontic imaging program, click the tab. You can use all the functions of orthodontic imaging from the patient's treatment card.

See your orthodontic imaging documentation for more information.

## TxPlan Tab

A treatment plan is a series of steps used to define a patient's course of treatment. The **TxPlan** tab enables you to add an existing treatment plan template for a patient or create a new one. After you assign an existing treatment plan template to a patient, you can modify the steps within the template and customize it for the patient.

A patient can have multiple treatment plans, but only one plan can be active at a time.

## Adding a Treatment Plan

To add a treatment plan template to a patient's treatment card:

1 In the **Treatment Card** window, select the **TxPlan** tab. The **TxPlan** window is displayed.

2 Click **Add New TxPlan**. The **Add Treatment Plan** window is displayed.

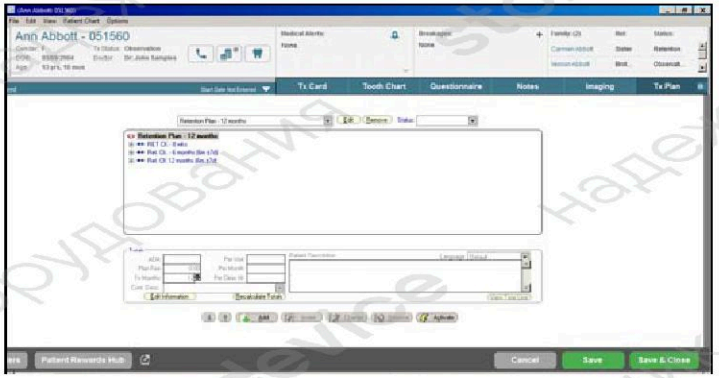
3 Click the **Select a Treatment Plan Template** option.

4 Click **OK**. The **Copy Treatment Plan** window is displayed.

5 Select a treatment plan template in the list and click **Copy**. The **Treatment Plan Title** window is displayed.

6 Type a new name for this treatment plan template, if necessary, and click **OK**.

The **Charting–TxPlan** window is redisplayed with the treatment plan template information.




7 Click **Activate** to activate the treatment plan for this patient.

8 Click the **TxCard** tab. Enter the procedures or comments about the procedures performed today.



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The information about the first treatment plan appointment is displayed in the **Next TxPlan Appointment** section.

9 Click **OK**.

## Checking Out a Patient with an Active Treatment Plan

To check out a patient with an active treatment plan:

1 After entering procedures and comments about the current day's treatment in the treatment card, click **OK** to return to the patient chart.

2 Click the **Patient Checkout** button. The **Financial Functions—Charges and Payments** window is displayed.

3 Enter the charges and payments in the window and click the **Post Transactions** button.

4 Click **Close**. The **Appointment Survey** view is displayed.

5 Click **Schedule Appt**. The **View Schedule** window is displayed:



6 In the **TxPlan Detail** standard, the procedure information for the next appointment is displayed. Click **Find Appointment**. The **View Schedule** window displays a list of appointment times corresponding to that procedure type.

7 Select an appointment time. The appointment information is displayed, including the patient name, the date, time, chair, type, time units, and any comments.

8 Select the **TxPlan** option. The window expands, showing the details of the **Next Appointment** section of the patient's treatment card.



9 Click **Paste**.

10 Click **OK**.

11 Click **Close**.



**Patient Checkout**



**Post Transactions**



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## Using the TxPlan Time Line

After you schedule the first appointment for a treatment plan, you can view a time line illustrating the patient's treatment by clicking the **TxPlan** tab in the patient chart.

The time line displays the appointment types and approximate dates the appointments are to be scheduled.

The appointment types in the time line and the **Treatment Plan** window are color-coded. The colors include:

- **Dark green**–Completed
- **Light green**–Scheduled/on target
- **Blue**–Targeted future date
- **Red**–Off target
- **Purple**–Emergency appointment

To use the time line:

- Click the scrollbar to view all of the time line information.
- Deselect the **Show Descriptions** option to display only dates on the time line.
- Click **View Totals** to view the total fee for the treatment plan; the length of treatment; the ADA code; a treatment description; and fields showing dollar amounts per visit, per month, and per clinical hour.
- Click **Edit Information** to change the information in any of the fields.

**Important**

**When scheduling a treatment plan appointment, you must select Paste to attach the procedures to the appointment and keep the treatment plan on track.**

## Working with a Treatment Plan

When a treatment plan is assigned to a patient, you can:

- View completed, scheduled, and remaining steps
- View appointment history for completed steps
- Manually mark a step as completed
- Edit an existing plan
- Activate or deactivate a plan

### Viewing Completed/Scheduled/Remaining Steps

You can view all steps in a treatment plan by clicking the **TxPlan** tab. The **Treatment Plan** window is displayed.

To view details about the steps in a treatment plan:

- Select the treatment plan name to display the time line.
- Select a completed step, in dark green, or a scheduled step, in light green, to display information about the appointment in the **Appointment History** section.
- Select one of the remaining steps, in blue, to display information about the steps in the **Step Details** section.
- Click the plus sign in front of the bracket icon to display the procedures and activities associated with the step.

### Manually Marking a Step as Completed

If you complete a step ahead of schedule, you can mark the step as completed by selecting the step and clicking **Mark as Completed**. A message is displayed, stating that the change will be made when you exit the treatment card.



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### Editing a Treatment Plan

With the **Treatment Plan** window displaying a treatment plan, use the following buttons to make changes to the patient's treatment plan:

- **Edit**–Click to change the name of this treatment plan.
- **Delete**–If you have not scheduled an appointment for a treatment plan, you can delete the treatment plan by selecting the treatment plan name and clicking **Delete**.
- **Add**–Click to add steps to the treatment plan for this patient. Select whether to add a predefined step or create a new step. The step is added to the bottom of the list. Use the arrow buttons at the bottom of the window to position the step in the appropriate area.
- **Insert**–Click to insert a step in the treatment plan. Select the step you want to be below the new step and click **Insert**. Select whether to add a predefined step or create a new step. The step is added above the step you selected.
- **Change**–Click to change a step in the treatment plan. Select the step you want to edit and click **Change**. The **Change Step** window is displayed. Make changes to the step as necessary.
- **Remove**–Click to remove a step from the treatment plan. Select the step you want to remove and click **Remove**.

### Activating or Deactivating a Plan

After adding a treatment plan to a patient's treatment card, click **Activate** and schedule the first appointment for the treatment plan. Once a treatment plan is activated, the status of the plan is **Active** and cannot be changed.

If you need to deactivate the treatment plan, click **Deactivate**. Patient appointments are no longer pre-populated in the **Next Appointment** section of the treatment card.

After you post procedures to a treatment plan, the treatment plan cannot be deleted; however, you can add another treatment plan, as long as you deactivate the existing plan. Only one plan can be active at a time.

When you deactivate a treatment plan, use the drop-down list in the **Status** field to select a status, indicating the reason for deactivating the plan.

## Scheduling Future TxPlan Appointments

After scheduling the initial treatment plan appointment, the next step in the plan is displayed in the **Treatment Plan Information** window. To schedule the next appointment, search for the next available time, which should be within seven days of the target date shown in the window. If the appointment date is more or less than seven days from the target date, an **Off Target** message is displayed in the **Schedule Appointment** window.



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## Printing a Treatment Plan

You can print an office copy and a patient copy of a treatment plan. The office copy contains the entire plan information except the patient description. The patient copy prints the step title and the information entered in the **Patient Description** of the treatment plan step.

To print the treatment plan:

1 With the patient's treatment card open, select one of the following:

- **File > Print Tx Plan > Patient Copy**
- **File > Print Tx Plan > Office Copy**

The **Treatment Plan Print Options** window is displayed.

2 On the **Print Options** window, select **Print Report**, **Preview Report**, or **Export Contents**.

3 Use the drop-down list to select a printer, if necessary, and click **OK**.

## Completing a Treatment Plan and Updating the Treatment Plan Status

When you type the information for a patient's last treatment plan appointment in the **Charting—TxCard Tab** window and click **OK**, a message is displayed, asking if you want to deactivate the plan and update the status.

To deactivate the plan and update the treatment plan status:

1 In the **Treatment Plan** message window, click **Yes**. The **Select Treatment Plan Status** window is displayed.

2 Highlight the new status and click **Select**.

# Searching Treatment Card Histories

You can perform a search of a patient's treatment card history by procedure or by date.

## Searching a Treatment Card History by Procedure

To search a patient's treatment card history by procedure:

1 In a patient's treatment card, select **Edit > Search Tx Card History**. The **Search Tx Card** window is displayed.

2 To select the procedure code to search for, click the code in the **Available Procedure Codes** list and then click the **Single-arrow** button. Repeat this step to add additional procedures to the list.

3 Click **Search**. A list of the codes that match your search criteria is displayed.

4 To view the procedure in the patient's treatment card history, select a procedure code and click **View**.

## Searching a Treatment Card History by Date

To search a patient's treatment card history by date:

1 In the **Search Tx Card** window, select **Search by Date**. The **Search Tx Card** window is displayed.

2 In the **Search Date** field, type the date for which you want to search.

3 Click **Search**. The section of the patient's treatment history containing the date you selected is displayed.



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## Printing Reports

Several reports enable you to track a patient's treatment card information. The following treatment card reports are available by selecting **Reports > Charting** from the main menu:

- Bracket Tray Covers
- Patients with Appt on Specific Date
- Patients Scheduled with No History
- History for Range of Dates
- History for Range of Patients

To print a report:

1 From the main menu, select **Reports > Charting** and one of the report options.

2 Depending on the report option you select, an interim window is displayed, enabling you to select specific criteria you want to include in the report. Click **Print**. The **Print Options** window for that report type is displayed.

3 On the **Print Options** window, select **Print Report**, **Preview Report**, or **Export Contents**.

4 Click **OK**.



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## Skill Sharpeners

### Exercise 1—Add Elastics

You are applying elastics and bands to a new patient. How do you chart the procedures?

To add elastics:

1 In the **Elastics** section, click **Predefined**. The **Select Item from List** window is displayed.

2 Select an elastic option from the list and click **OK**. The patient chart is displayed.

3 In the **Elastics** section, use the drop-down list in the **Type** field to select the elastic type.

4 Select an option button for the times the elastics are to be worn.

5 Select the starting tooth and click the left mouse button.

6 Move the cursor to the tooth to which the elastic connects and click the left mouse button.

7 Click **OK**.

### Exercise 2—Add Brackets and Bands

To add brackets or bands to the tooth chart:

1 Select the tooth to which you want to attach a band or bracket.

2 In the **Band/Bracket History** section, click **<Add New Entry>**. The **Band/Bracket History** window is displayed.

3 Select the entry you want to display in the **Band/Bracket History** section and click **OK**. The entry is displayed in the section, along with the current date.

If the entry you want is not in the list, click **<Free Form>**. The **Free Form Prompt** window is displayed.

4 Type the new entry and click **OK**. A message asks if you would like to add this entry to the list for future use. Select **No**.

An "i" icon is displayed on teeth that have history information or comments attached to them. Click on the tooth to view the history or comment in the **Band/Bracket History** section.

5 Click **Apply** on the **Tooth Chart** tab.



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Lesson 13

# Working with the Patient Flow Module

This lesson includes:


- Understanding the Charting/Patient Flow Window on page 105
- Understanding the Light Bar on page 109


The OrthoTrac patient flow module is an electronic patient monitoring system that enables you to keep track of the patients in your office.

The basic patient flow module sequence is as follows:

1 The patient checks in for his appointment using a computer in the lobby.

2 When your staff is ready for the patient, a staff member moves the patient from the **Lobby** to the **In Deck** or **Operatory**.

3 When the patient's treatment is finished, a staff member moves the patient from the **Operatory** to the **Out Deck** or **Check Out** area.

4 When the staff member moves a patient to **Check Out**, the patient is moved to **Gone** automatically.

For more information about using the patient flow module on the patient check-in computer, see the online help.

## Understanding the Charting/Patient Flow Window

**Tip**

Select patient flow options by clicking **Maintenance/ Set-up > Patient Flow Options**.

You can select from two patient flow staff display types:

- **Staff - Photographic Display**–You move the patients by clicking on the patient's picture.
- **Staff - Text-Based Display**–You move the patients by clicking on the patient's name or dragging the name to the desired location.

To access the patient flow module from the main menu, click the **Patient Flow** button. If you are the first user opening the patient flow module for the day, the **Preparing to Archive** message window is displayed. Click **Yes**.



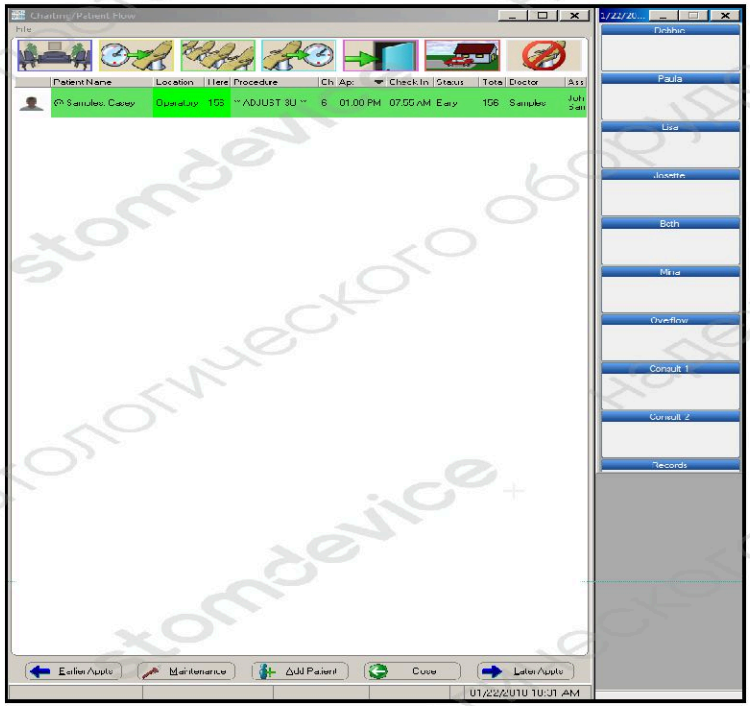
**Patient Flow**



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The **Charting/Patient Flow** window is displayed.



The row of icons at the top of the window indicates the destinations to which you can move a patient from this workstation. The locations include:

- **Lobby**
- **In Deck**
- **Operatory**
- **Out Deck**
- **Check Out**
- **Gone**
- **Cancelled**

**Note**

Your office practices determine the destinations used in your patient flow module setup.

The following fields can be displayed:

- **Patient Name**–Name of the patient
- **Location**–Patient's current location in the office
- **Here**–Number of minutes at the current location
- **Appt Type/Procedure Type**–Type of appointment or procedure
- **Ch**–Assigned chair
- **Appt Tm**–Scheduled appointment time
- **Check In**–Patient's check-in time
- **Status**–Indicates if the patient is early, late, or a no-show
- **Total**–Total time spent in the office
- **Doctor**–Name of the doctor
- **Assistant**–Name of the assistant

If your office has enabled the Warning Information System, the following conditions can exist:

- The **Location** column flashes if the staff has broken a time constraint.
- The **Status** column flashes if the patient has broken a time constraint.

An asterisk (*) or a plus sign (+) beside a patient's name indicates that a comment is attached to the patient's check-in record.

If you are using the check-in message feature, an @ before the patient name indicates that a check-in message exists for the patient.



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The following buttons at the bottom of the window enable you to customize the patient flow module display:

- **Earlier Appts**–If you configured the patient flow module to display only patients within a specified time limit (for example, 60 minutes), click **Earlier Appts** to display all patients who had appointments more than 60 minutes ago.
- **Maintenance**–Click to display the **Patient Flow Setup and Maintenance** window, which enables you to change any of the patient flow module settings.
- **Add Patient**–Click to add a patient to the patient flow module. See "Adding a Patient in the Patient Flow Module" on page 108 for more information.
- **Close**–Click to close the patient flow module.
- **Later Appts**–If you configured the patient flow module to display only patients within a specified time limit (for example, 60 minutes), click **Later Appts** to display all patients who have appointments more than 60 minutes from the current time.

## Changing Patient Location

When you move a patient from one location to another, the software tracks the time the patient spends in the new location. Depending on the way their computers are configured, other staff members can view the patient's new location on their monitors.

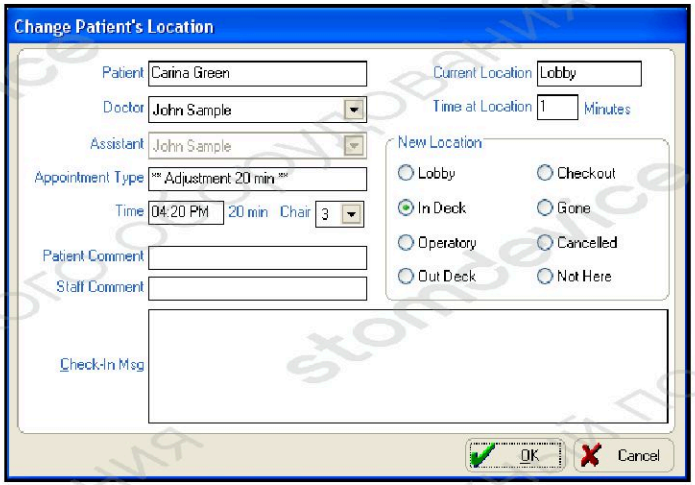
If you purchased the charting module, you can configure the software to automatically load the charting module when patients are moved to the operatory. You can also set up the software so that patient checkout is automatically loaded when patients are moved to **Check Out**.

To change a patient location:

1 Select one of the following methods of changing a patient's location:

- Dragging and dropping
- Double-clicking
- Right-clicking

After moving a patient, the **Change Patient's Location** window is displayed.




**Tip**

You can drag a patient's name or picture from the grid directly to a chair.

**Note**

The **Change Patient's Location** window is displayed only if you have previously enabled it. To enable this window, select **Maintenance/ Set-up > Patient Flow Options > Grid Setup > Display Change Patient Location**.



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The **Change Patient's Location** window displays information about the patient's appointment. The patient's name, appointment type, time and length of procedure, current location, and time at location are view-only.

2 In the **Doctor**, **Assistant**, and **Chair** fields, use the drop-down lists to change the information, if necessary.

3 To add or change a message in the **Patient Comment, Staff Comment**, or **Check-In Msg** fields, type the message in the appropriate field.

**Note**

The patient sees the **Patient Comment** as soon as he checks in. Enter only the comments you want the patient to see.

4 If you move a patient to the same destination or to a destination that is earlier in the sequence than the current location (for example, Operatory to Lobby), the software displays a confirmation message. If you click **Yes**, the time already recorded for that patient in that location is lost.

If you have checked in a patient in error, cancel the check-in by changing the location to **Not Here**.

**Note**

On either of the patient flow staff displays, an @ symbol beside the patient name indicates that the patient has a check-in message attached to his chart.

5 When you drag and drop a patient, the location you dropped the patient in is selected in the **New Location** section. Click **OK**.

With the double-clicking or right-clicking methods, the software automatically selects the next location; for example, if the patient was in the **Lobby**, and you use the **In Deck** option, then **In Deck** is selected. Click the desired location and click **OK**.

## Checking In a Patient with a Check-In Message

A patient might receive a message at check-in that the check-in process cannot be completed and to see the receptionist. This means that a check-in message has been placed in the patient's chart, either automatically by the software or by a staff member.

To check in a patient with a check-in message:

1 Open the **Change Patient's Location** window for the patient, using one of the methods described under "Changing Patient Location" on page 107.

2 In the **Check-In Msg** section, view the message and take the appropriate steps to resolve the condition; for example, having the patient sign a form, speaking to a parent about a late payment, and so on.

3 In the **New Location** section, **Lobby** is selected. Click **OK**.

## Adding a Patient in the Patient Flow Module

You can add patients to the day's schedule from within the patient flow module; however, adding a patient in the patient flow module is not the same as adding a patient with the appointment book. The software treats a patient added in the patient flow module as a walk-in patient.

To add a patient in the patient flow module:

1 Click **Add Patient** at the bottom of the **Staff - Text-Based** display window. The **OrthoTrac Software Patient Lookup** window is displayed.

2 Select the name of the patient to add and click **OK**. The **Add Patient to Patient Flow System** window is displayed.



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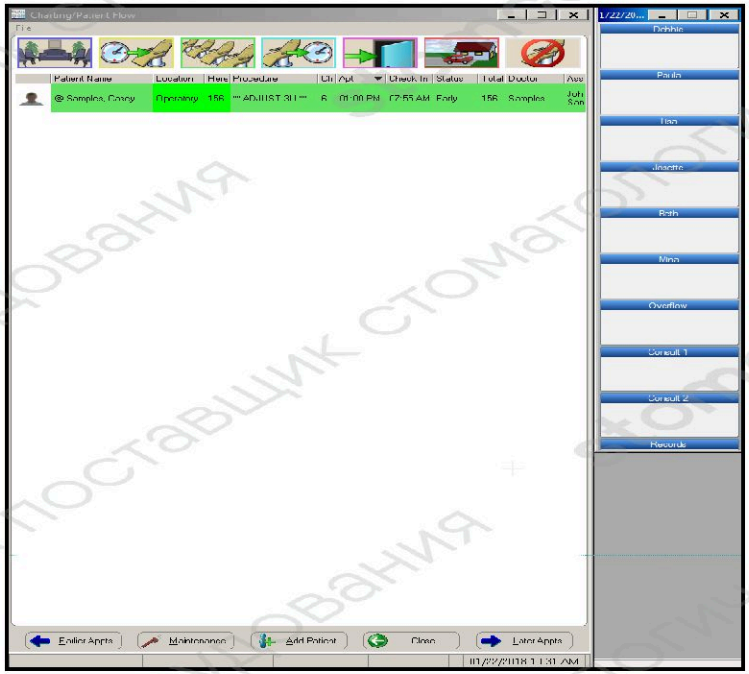
3 Use the drop-down list in each field to select the appropriate information. To add a staff or patient comment, type the comment in the appropriate field.

4 Click **OK**.

## Understanding the Light Bar

If your office uses the charting module along with the patient flow module, you can display a light bar to the right of the patient flow grid, or you can display a stand-alone light bar. To choose an option, select **Maintenance/Set-up > Patient Flow Options > Light Bar Options**.

Each block on the light bar represents a treatment chair. The name of the patient assigned to each chair, the appointment type, and the patient's early or late status are displayed in each block.



Each chair on the light bar includes a dynamic clock icon, which tracks the amount of remaining chair time for an appointment. Blue indicates the amount of appointment time already spent. Green indicates time remaining to spend with the appointment. Red indicates time in the chair beyond the scheduled appointment time.

The light bar chairs change colors depending on the action taken for each chair. Chairs are white when vacant and change to light blue when occupied.

### Using the Light Bar Menu

Click on a patient in a chair to display the light bar menu. Use this menu to call the doctor to a specific chair when a patient is ready or when a patient has an emergency.

Table 1 shows the options available on the light bar menu.

**Table 1 Light Bar Menu Options**

| Action | Effect on Chair | Next Waiting |
|---|---|---|
| **Call Dr. (Normal)** | Dr. color is displayed solid.<br>Green flashing (time counter begins) | None |
| **Call Dr. (Emergency)** | Dr. color is displayed solid.<br>Red flashing (time counter begins) | None |
| **Doctor is Here** | Doctor color is displayed solid.<br>Teal | Automatically cancelled in previous chair if **Doctor Is Here** is selected in another chair. Color changes back to light blue. |
| **Cancel Call for Doctor** | Light blue | |
| **Load Charting** | None | None |

**Note**

With version 14.0, a stand-alone light bar is the default setting.

**Tip**

To move from one patient's treatment card to another, right-click on an occupied chair and select **Load Charting**.



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**Table 1 Light Bar Menu Options (Continued)**

| Action | Effect on Chair | Next Waiting |
|---|---|---|
| **Move Patient to...** | Lobby<br>In-Deck<br>Out-Deck<br>Check-Out<br>Gone | Moving the patient to any of these locations empties the operatory chair. |
| **Cancel** | None | |

**Note**

Your office may not use all of these patient flow locations.

To use the light bar:

1 Click or right-click on an occupied chair to display the light bar menu.

2 Select **Call Dr. (Normal)** or **Call Dr. (Emergency)**, and a pop-up window is displayed.

3 Select **Doctor 1**, or select the appropriate doctor number from the list, if your office has more than one doctor.

4 If you click on another chair and select **Call Dr.**, you can select the same doctor or a new one.

5 If you select **Any Doctor**, the top portion of the color bar does not change, while the bottom portion changes from light blue to dark green and begins flashing. A time counter is started.

When the doctor answers the call and selects **Dr. Is Here** and his doctor number, the top portion of the color bar stops flashing, and the bottom portion of the color bar changes to teal.

6 When you drag and drop a patient, the location you dropped the patient in is selected in the **New Location** section. Click **OK**.

With the double-clicking or right-clicking methods, the software selects the next location; for example, if the patient was in the **Lobby**, and you use the **In Deck** option, then **In Deck** is selected. Click the desired location and click **OK**.



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## Skill Sharpeners

### Exercise 1—Add a Patient in the Patient Flow Module

A patient without an appointment comes in and asks if he can make an appointment. You can use the patient flow module to schedule walk-in appointments.

To add a patient in the patient flow module:

1. Click **Add Patient** at the bottom of the **Staff - Text-Based** display window. The **OrthoTrac Software Patient Lookup** window is displayed.
2. Select the name of the patient to add and click **OK**. The **Add Patient to Patient Flow System** window is displayed.
3. Use the drop-down list in each field to select the appropriate information. To add a staff or patient comment, type the comment in the appropriate field.
4. Click **OK**.

### Exercise 2—Move a Patient from One Location to Another

A patient has checked in for his appointment using a computer in the lobby. Move the patient from the lobby to the operatory.

To change a patient's location:

1. Select the patient.
2. Click the **Patient Flow** button. If a message is displayed, click **Yes**. The **Charting/Patient Flow** window is displayed.
3. Click-and-drag the patient to the **In Deck** or **Operatory** icon. The **Change Patient's Location** window is displayed.
4. Click **OK** and move the patient to the **Out Deck** or **Check Out** icon.



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Lesson 14

# Running the Roll and Generating Statements

This lesson includes:


- Running the Financial Roll on page 113
- Generating and Printing Statements on page 115


## Running the Financial Roll

The roll enables you to apply contract charges and late charges to patient accounts and to age the balance. Before running the roll, print and close the current daysheet, and perform a daily backup.

To run the roll:

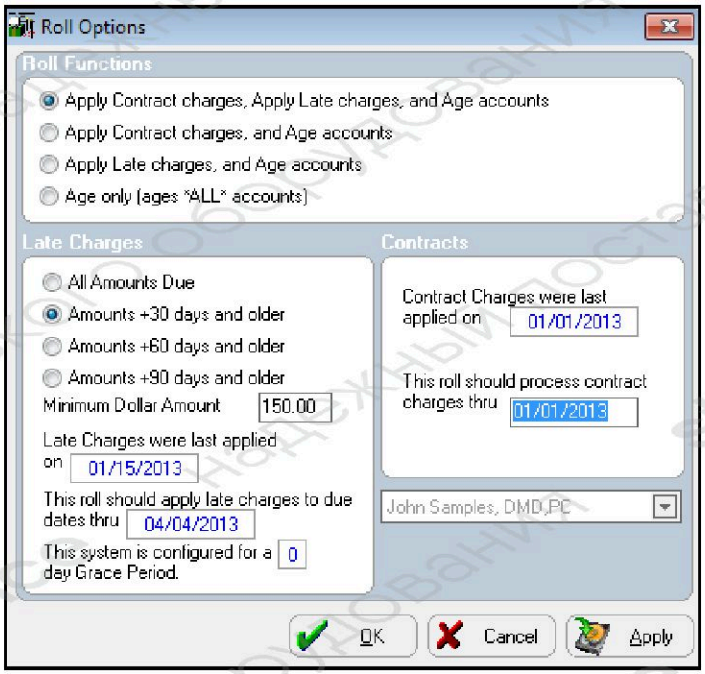
1 On the main menu, select **Reports > Financial > Roll > Roll Accounts**. A message is displayed, stating that all other workstations must exit the OrthoTrac software and asking if you are sure you want to do this.

2 Click **Yes**. A message is displayed, asking if you have done a daily backup.

3 If you have not done a backup, click **No** to return to the main menu and perform a backup. If you have performed the backup, click **Yes**.

Several messages are displayed as the software prepares the data for the roll. This process can take several minutes, depending on the size of your data.

When the data is prepared for the roll, the **Roll Options** window is displayed.




If this is the first roll after conversion, the **Age only (ages *ALL* accounts)** option in the **Roll Functions** section is selected, and the **Late Charges** and **Contracts** sections are inactive.

When the first roll is complete, you should run the roll a second time to activate the contracts and apply late charges.

**Caution**

**Do NOT exit from the roll process once it has begun.**

**Important**

**In the event of a system failure during the roll, it is critical that you have a backup.**



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4 In the **Roll Functions** section, select from these options:

- **Apply Contract charges**, **Apply Late charges**, **and Age accounts**–Contracts, pay plans, and monthly fee accounts are processed. Based on the account roll day, any unrolled contract charges that fall on or before the date in the **Contracts** section "thru date" are applied. Any pending contracts with an initial fee date prior to this date are activated.

  Late charges are applied, provided the account meets late charge criteria.

  Accounts are aged into due, 30-day, 60-day, or 90-day categories.

- **Apply Contract charges, and Age accounts**–Contracts, pay plans, and monthly fee accounts are processed. Based on the account roll day, any unrolled contract charges that fall on or before the date in the **Contracts** section "thru date" are applied. Any pending contracts with an initial fee date prior to this date are activated.

  Accounts are aged into due, 30-day, 60-day, or 90-day categories.

- **Apply Late charges, and Age accounts**–Late charges are applied if the account meets late charge criteria.

  Accounts are aged into due, 30-day, 60-day, or 90-day categories.

- **Age only (ages *ALL* accounts)**–Accounts are aged into due, 30-day, 60-day, or 90-day categories.

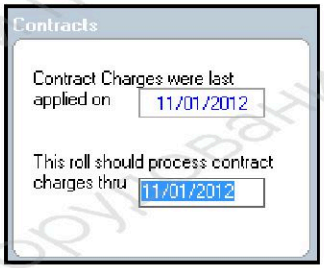
If either of the first two options in the **Roll Functions** section is selected, the **Contracts** section is active.

**Caution**

**Do not roll ahead. Data can be distorted and accounts will not age properly if you attempt to apply contract charges and late charges for dates in the future.**

If a contract charge roll has not been performed, the current date is displayed in the top field.

If a contract charge roll has been performed, the date through which charges were rolled is displayed in the top field. In the second field, you must type the date through which this roll should process charges–usually the current date.




5 If you select the **Apply Contract charges**, **Apply Late charges**, **and Age accounts** option or the **Apply Late charges**, **and Age accounts** option in the **Roll Functions** section, the **Late Charges** section is active. Do the following:

- Select the age of accounts to which late charges should be applied. Select from the following:
  - **All Amounts Due**
  - **Amounts +30 days and older**
  - **Amounts +60 days and older**
  - **Amounts +90 days and older**
- In the **Minimum Dollar Amount** field, type the minimum dollar amount.

6 If you have made changes to the **Roll Options** window that you will use each time you run the roll, click **Apply** and **OK**. The software displays a message, listing the roll functions to be performed and asking if you want to continue.

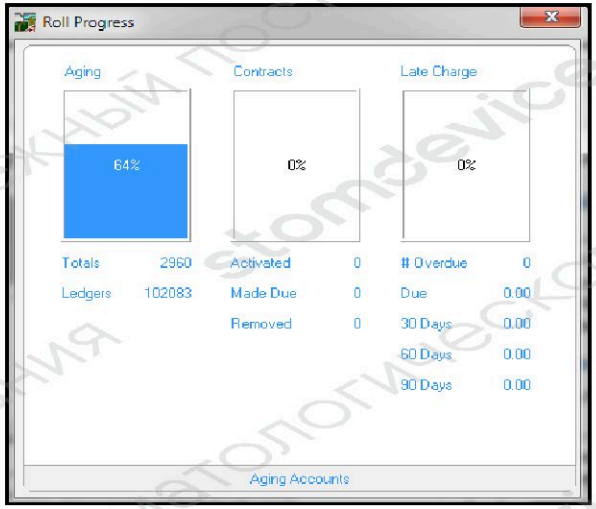
7 Click **Yes**.



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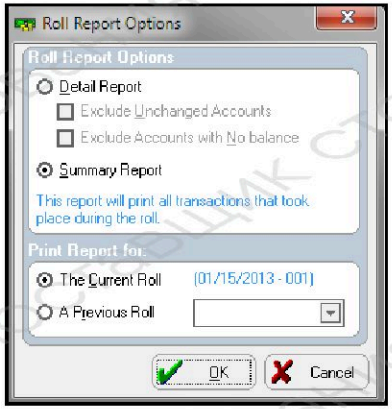
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As the roll processes, the **Roll Progress** window is displayed.




The selected roll functions and the accounts processed determine which boxes display progress.

After the roll has completed, the **Roll Report Options** window is displayed.




8 Select the report options you want to print.

9 Click **OK**.

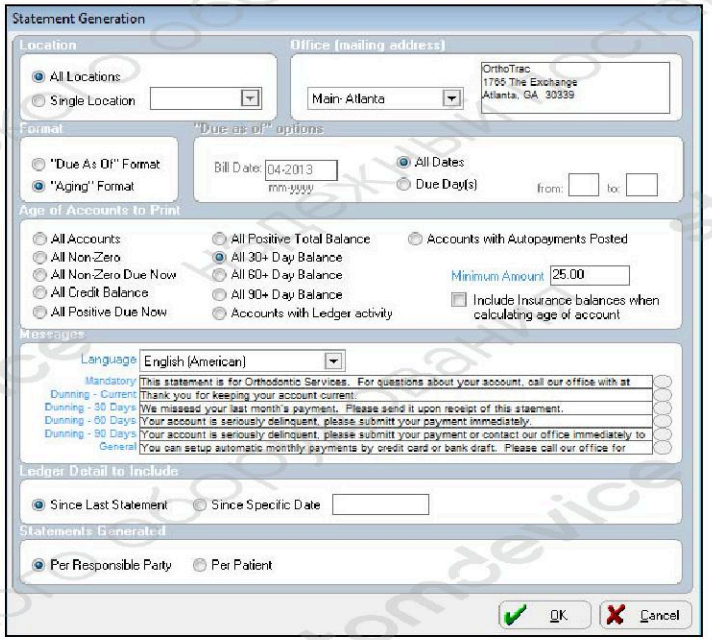
## Generating and Printing Statements

To print account statements, on the main menu select **Reports > Financial > Statements**. The **Statements** menu is displayed. The following options are available: **Statement Exception Report**, **Generate Statements**, **Print/View Statements**, and **Individual Statements**.

### Generating Statements

To generate statement information:

1 On the main menu, select **Reports > Financial > Statements > Generate Statements**. The **Statement Generation** window is displayed.




2 In the **Location** section, select an option. If you select **Single Location**, use the drop-down list to select the location from the list.

**Note**

Notify your support representative if roll exceptions or errors occur during the roll.

**Note**

You can print roll reports separately, at a later time, by selecting **Reports > Financial > Roll > Print Roll Reports**.



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3 In the **Office (mailing address)** section, select the mailing address you want to print on the statements.

4 In the **Format** section, select the appropriate format:

- **Due As Of Format**–Statements are printed before accounts are rolled and include the next month's contract charges.
- In the **Bill Date** field, type the month and year for the statements. This should be the next month that the Monthly Roll posts contract charges. Select the **All Dates** option to print statements for all due dates, or select **Due Day(s)** and type dates in the **from:** and **to:** fields for a range of due dates.
- **Aging Format**–Statements are printed after accounts have been rolled.

5 In the **Age of Accounts to Print** section, select from the following options:

- **All Accounts**–All accounts regardless of the balance.
- **All Non-Zero**–Accounts with a positive or a credit total balance.
- **All Non-Zero Due Now**–Accounts with a positive or a credit current balance. In the **Minimum Amount** field, enter the account balance that you want to receive statements.
- **All Credit Balance**–All accounts with a credit total balance. In the **Minimum Amount** field, enter the minimum account balance that you want to receive statements.
- **All Positive Due Now**–All accounts with a positive current balance. In the **Minimum Amount** field, enter the minimum account balance that you want to receive statements.
- **All Positive Total Balance**–All accounts with a positive total balance. In the **Minimum Amount** field, enter the minimum account balance that you want to receive statements.
- **All 30+ Day Balance**–All accounts with a positive 30+ day balance (including 60, 90+ day). In the **Minimum Amount** field, enter the minimum account balance that you want to receive statements.
- **All 60+ Day Balance**–All accounts with a positive 60+ day balance (including 90+ day). In the **Minimum Amount** field, enter the minimum account balance that you want to receive statements.
- **All 90+ Day Balance**–All accounts with a positive 90+ day balance. In the **Minimum Amount** field, enter the minimum account balance that you want to receive statements.
- **Accounts with Ledger activity**–All accounts with ledger activity receive statements. Select the **Include Insurance lines when determining ledger activity** option to include insurance activity when determining whether the account receives a statement.
- **Include Insurance balances when calculating age of account**–Select this option to include the insurance balance when calculating the balance to determine whether the account receives a statement.



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6 In the **Messages** section, select the language and the type of message: Mandatory, Dunning, General, or Individual Responsible Party.

To enter a message, click the button to the right of the appropriate message line. The corresponding message window is displayed.

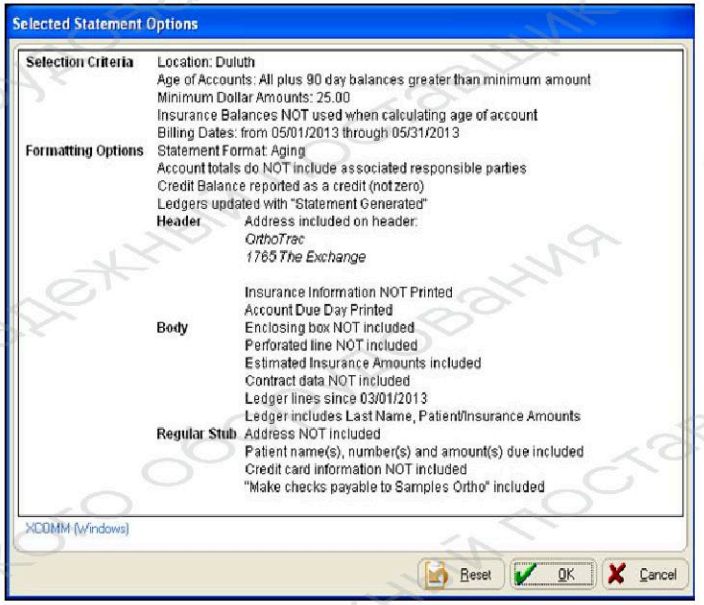
Type your message and click **Add**, or click **Change** to edit an existing message. You can also click **Remove** to delete a message. Click **Close** to save the message.

7 In the **Ledger Detail to Include** section, select from the following:

- **Since Last Statement**
- **Since Specific Date**

8 In the **Statements Generated** section, choose whether you would like to generate statements **Per Responsible Party** or **Per Patient**.

9 Click **OK**. The **Selected Statement Options** window is displayed.




10 Review the options and click **OK** to begin generating statements. If some of the information is incorrect, click **Reset** or **Cancel**.

11 After the software generates statements, if you want to print the Post-Generation Summary report, click **Yes**.

**Tip**

After generating and printing the batch, print the exception/error list, make any corrections to those accounts, and generate individual statements for responsible parties who did not receive a statement from the initial batch generation.



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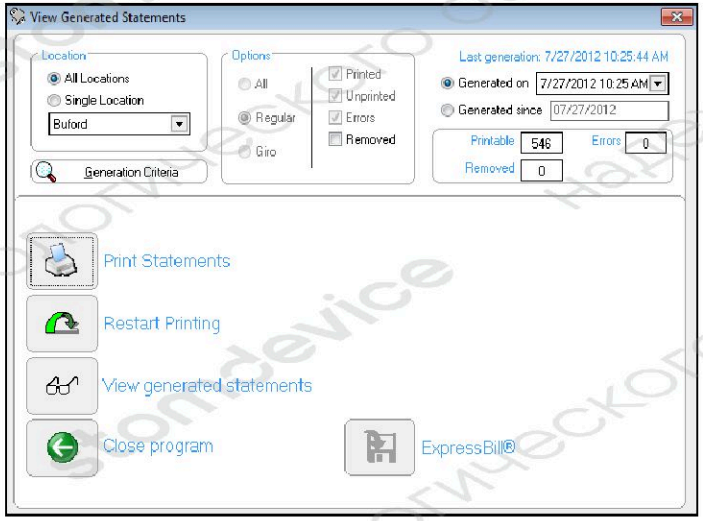
**Tip**

Remember to put plain paper in the printer before printing the Post-Generation Summary report.

## Printing/Viewing Statements

To print or view account statements:

1 On the main menu, select **Reports > Financial > Statements > Print/View Statements**. The **View Generated Statements** window is displayed.




The window settings selected are based on the options you chose when you last generated statements. The **Printable** field shows the number of statements that will print.

For more information about statement generation, click **Generation Criteria**.

2 Load statement forms in the printer if you are using them, and select from the following options:

- **Print Statements**
- **Restart Printing**
- **View Generated Statements**
- **Close Program**
- **ExpressBill**

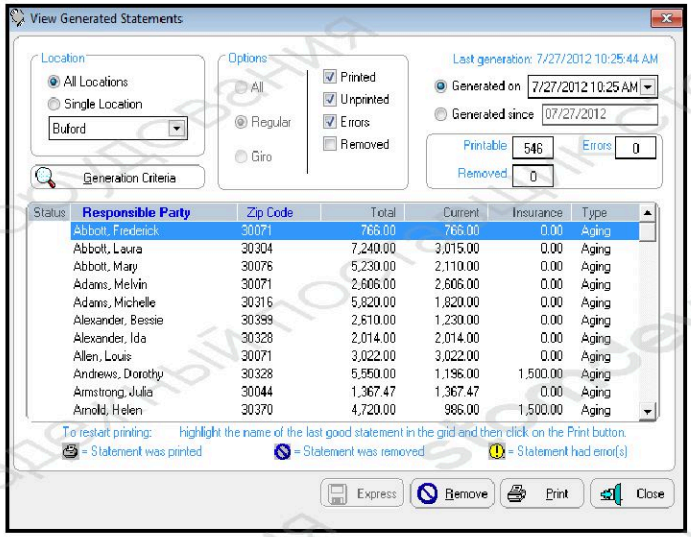
**Tip**

To view details of statements generated previously, double-click the responsible party, select **File > Statement History,** and double-click a statement date.

## Working with Generated Statements

To work with a list of generated statements:

1 In the **View Generated Statements** window, click **Restart Printing** or **View Generated Statements**. The **View Generated Statements** window is displayed, with additional options.




2 To print statements that were generated prior to the last statement generation, select **Generated on** and use the drop-down list to select the statement run date.

**OR**

To print all statements generated since a specific date, select **Generated since**, enter the date, and press Enter.

Click **Print**.



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3 To view statements, select from the following options:

- **Printed**
- **Unprinted**
- **Errors**
- **Removed**

The **Status** column contains four options:

- A blank status means the statement was generated.
- A **Printer** icon indicates the statement has been printed.
- The **Remove** icon indicates the statement has been removed from the print list.
- The **Error** icon indicates the statement was not generated due to errors.

4 Use the buttons at the bottom of the window to perform additional functions:

- **Express**–Click to begin the ExpressBill transmission process.
- **Remove**–Click to remove a statement from the list and prevent it from printing.
- **Print**–Click to display the print menu. Select from the following print options:
  - **Print List of Generated Statements**
  - **Print Post-Generation Summary**
  - **Print All Unprinted Statements in List**
  - **Print all Statements from Highlighted Name Forward**
  - **Close**

## Generating an Individual Statement

To generate an individual statement:

1 On the main menu, select **Reports > Financial > Statements > Individual Statement**. The **OrthoTrac Software Responsible Party Lookup** window is displayed.

2 Search for the responsible party name and click **OK**. The **Generate a Statement** window is displayed.

3 Select the appropriate office address, if necessary, and click **OK**. The **View Statement** window is displayed.

4 Click **Print!**

5 Click **Exit!**

## Correcting Errors After Generating Statements

If you receive errors after generating statements, follow these steps to correct the accounts:

1 Use the **OrthoTrac Software Patient Lookup** window to search for the responsible party name and open the patient chart.

2 In the **Patient Information** window, double-click the responsible party name and correct the missing or erroneous data. Click **OK**.

3 In one of the patient's financial functions windows, click **Reports > Statements**. The **Generate a Statement** window is displayed.

4 Select the appropriate office address, if necessary, and click **OK**. The **View Statement** window is displayed.

5 Click **Print!**

6 Click **Exit!**



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## Skill Sharpeners

You have closed the daysheet and performed a daily backup. Now you are ready to run the roll and generate statements. First, you want to apply contract and late charges to patient accounts and to age the balance.

### Exercise 1—Run the Roll

To run the roll:

1 On the main menu, select **Reports > Financial > Roll > Roll Accounts**. A message is displayed, stating that all other workstations must exit the OrthoTrac software and asking if you are sure you want to do this.

2 Click **Yes**. A message is displayed, asking if you have done a daily backup.

3 Click **Yes**. When all data is prepared for the roll, the **Roll Options** window is displayed.

4 In the **Roll Functions** section, select **Apply Contract charges**, **Apply Late charges**, **and Age accounts.** The **Late Charges** section is activated.

5 Select **All Amounts Due** as the age of accounts to which late charges should be applied.

6 In the **Minimum Dollar Amount** field, type the minimum dollar amount.

7 If you have made changes to the **Roll Options** window that you will use each time you run the roll, click **Apply** and **OK**. The software displays a message, listing the roll functions to be performed and asking if you want to continue.

8 Click **Yes**. After the roll has completed, the **Roll Report Options** window is displayed.

9 Select the report options you want to print and click **OK**.

### Exercise 2—Generate a Statement

A patient requests a duplicate statement and you want to print the statement without accessing the patient's chart.

To generate an individual statement:

1 On the main menu, select **Reports > Financial > Statements > Individual Statement**. The **OrthoTrac Software Responsible Party Lookup** window is displayed.

2 Search for the responsible party name and click **OK**. The **Generate a Statement** window is displayed.

3 Select the appropriate office address, if necessary, and click **OK**. The **View Statement** window is displayed.

4 Click **Print!**

5 Click **Exit!**



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Lesson 15

# Using the Collections Module

This lesson includes:


- Adding Promises on page 122
- Creating Collections Activities Reports on page 123
- Applying Payments to Promises on page 124

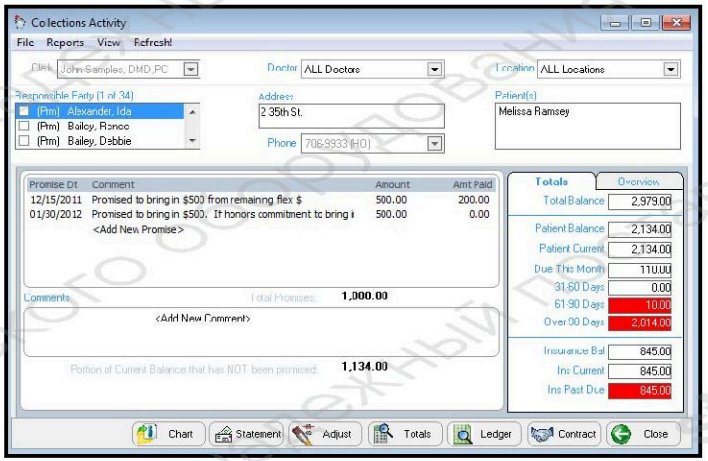

The OrthoTrac collections module helps you control Accounts Receivable by creating and tracking promises and printing reports of accounts with balances due, as well as those that have promises due.

To view a list of accounts with balances due:

1 On the main menu, click the **Collections Activity** button. The **Collections Activity for <Date>** window is displayed.




2 Select the accounts you want to view and click **OK**. The **Collections Activity** window is displayed.




3 In the **Responsible Party** field, a list of responsible parties whose accounts fit the criteria you selected is displayed. Select a name in the list to view a party's information. In front of the responsible party name, either **(Due)** for balance due or **(P/D)** for accounts with a promise and balance due is displayed. **(Prm)** is displayed in front of the responsible party name when you search only for **Accounts with Promise Due**.

To the right of the **Responsible Party** field are fields for the selected party's address, phone number, and associated patients.

**Important**

**Before you can use the collections module, you must convert your balances.**



**Collections Activity**

**Note**

The collections module uses the patient's due date and the grace period you set up in System Maintenance. For example, assuming you have a 10-day grace period, selecting **Accounts with Balance Due, Due Today and Earlier** produces a list of accounts whose balances are due today or within the last 10 days.



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**Tip**

You can edit collection letters in the **Collections Activity** window. Click the **Letters** button at the bottom of the window to access, post, and edit collection letters.

The center of the window contains the promise grid, where you can view existing promises and add new promises. Promises on the grid are color-coded:

- **Gray**–Paid promises
- **Teal**–Changed promises
- **Black**–Promises due
- **Purple**–Future promises
- **Burgundy**–Deleted promises

Account totals for the patient, including responsible party and insurance balances, are displayed on the right side of the window. You can add additional comments at the bottom of the window in the **Comments** field.

4 Select **View** from the menu bar to customize the information displayed in the **Collections Activity** window. Select from these options:

- **Contacted Parties**–Displays accounts previously contacted since the last financial roll.
- **Promises for Patients**–Displays promises for the selected patient or for all patients connected to the currently displayed responsible party.
- **Totals/Overview**–Displays account totals or an account overview as the current view.
- **Checks/Overdraft**–Displays auto-payment information.
- **Promise History/Changed Promises/Future Promises**–Select the types of promises you want to display in the promise grid. Future promises are displayed by default. Select **Promise History** to view deleted and paid promises. Select **Changed Promises** to include promises that have been changed in the view.
- **Show Options**–Shows the display options you selected in the **Collections Activity For <date>** window.

5 Use the function buttons at the bottom of the window to perform additional financial functions:

- **Statement**–Generates a statement for the account.
- **Adjust**–Makes an adjustment to the account.
- **Totals**–Opens the **Financial Functions–Totals** window for the account.
- **Ledger**–Displays ledger information for the account.
- **Contract**–Displays the **Financial Functions–Contracts and Payment Plans** window.

6 Click **Close**.



**Promises/Collections**

## Adding Promises

As you review the accounts and contact the responsible parties, you can add promises for the payments expected.

To add a promise:

1 In the **Collections Activity** window, click the responsible party and patient, if more than one patient is attached to the responsible party, and then double-click **<Add New Promise>** in the grid. The **Collections Activity–Add New Promise** window is displayed.

**OR**

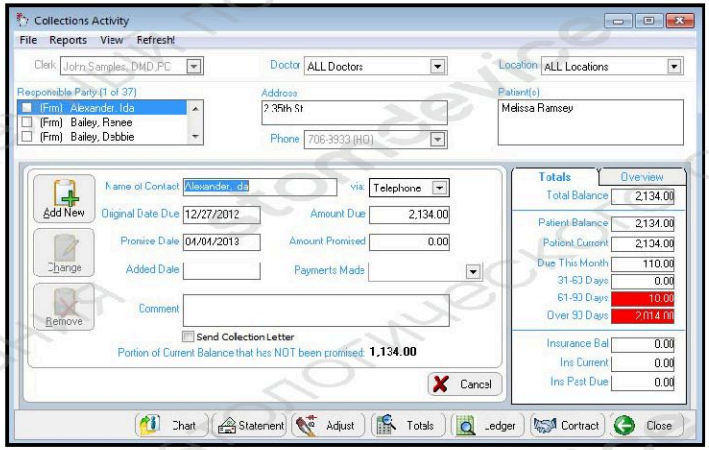
Open a patient chart, open a financial functions window, and click the **Promises/Collections** button.



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The **Collections Activity–Add New Promise** window for that patient is displayed.




The software populates the **Name of Contact** field with the name of the responsible party. The **Original Due Date** field contains the due date from the contract, and the **Amount Due** field shows the current balance on the account.

2 In the **Promise Date** field, type the date the promise is due, or double-click the field to display a calendar, and select the date.

3 In the **Amount Promised** field, type the payment amount promised.

4 In the **Comment** field, you can type a comment concerning the promise.

5 In the **Contacted via**: field, use the drop-down list to select the method used to contact the responsible party.

6 Click **Add New**. The **Portion of Current Balance that has NOT been promised** field displays the amount of the patient's current balance that has not been promised to be paid. If the entire current balance is not entered for a promise amount, the **Additional Promises Required** window is displayed, prompting you to enter another promise. Click **Yes** to enter another promise.

7 When you are finished adding promises, click **Close**.

## Changing and Removing Promises

To make changes to a promise or to delete a promise:

1 In the **Collections Activity** window, click the responsible party and patient, if more than one patient is attached to the responsible party, in the **Responsible Party** field. Any promises made by the responsible party are displayed in the promise grid.

2 Double-click the promise you want to change or delete. Change the data for the promise and click **Change** or click **Remove** to delete the promise.

3 When you are finished working with an account, click the box to the left of the responsible party's name to remove the name from the list.

4 Click **Close**.

# Creating Collections Activities Reports

You can run several Collections Activities reports that show accounts due and the associated promises for the accounts.

The following reports are available:

- **Collections Reports**–Prints information about accounts due for all accounts in the collections module or the current account.
- **Open Promises Report**–Prints a list of promises that have not yet been paid and the amount of expected



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payment for all patients/responsible parties in the collections module.

- **Paid Promises Report**–Prints a list of promises that have been paid and the amount of payment for all patients/responsible parties in the collections module.
- **Changed Promises Report**–Prints a list of all changed promises for all patients/responsible parties in the collections module.
- **Deleted Promises Report**–Prints a list of all deleted promises for all patients/responsible parties in the collections module.

To run a Collections Activities report:

1 In the **Collections Activity** window, select **Reports** from the menu bar. The **Collections Activity Reports** menu is displayed. Select the report you want to run. The corresponding report window is displayed.

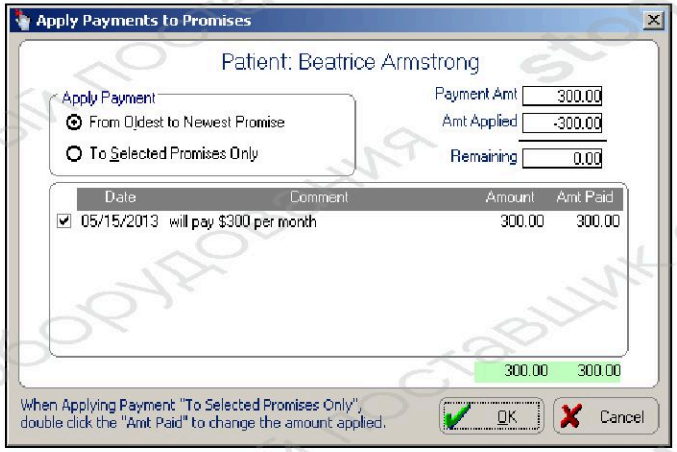
2 Select the criteria for the report, and type start and end dates where appropriate.

3 Click **OK**. The **Print Options** window is displayed.

4 Select to print, preview, or export the report and click **OK**.

## Applying Payments to Promises

When you are posting a payment, if a promise has been added to an account, the **Apply Payments to Promises** window is displayed.




To apply a payment to a promise:

1 In the **Apply Payment** section, select from these options:

- **From Oldest to Newest Promise**–Select this option to apply the payment to the oldest promise on the list.
- **To Selected Promises Only**–Select this option and select the promise to which the payment is to be applied.
- To apply the payment to no promise, deselect the options.

2 Click **OK**.



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## Skill Sharpeners

### Exercise 1–Add a Promise

You are reviewing the account for Betty Braces, and you want to add a promise for the payments expected.

To add a promise:

1 Open the chart for Betty Braces, open a financial functions window, and click the **Promises/Collections** button. The **Collections Activity–Add New Promise** window is displayed.

The software populates the **Name of Contact** field with the name of the responsible party. The **Original Due Date** field contains the due date from the contract, and the **Amount Due** field shows the current balance on the account.

2 In the **Promise Date** field, type the date the promise is due, or double-click the field to display a calendar and select a date.

3 In the **Amount Promised** field, type the payment amount promised.

4 In the **Comment** field, you can type a comment concerning the promise.

5 In the **Contacted via:** field, use the drop-down list to select the method used to contact the responsible party.

6 Click **Add New**. The **Portion of Current Balance that has NOT been promised** field displays the amount of the current balance that has not been promised to be paid. If the entire current balance is not entered for a promise amount, the **Additional Promises Required** window is displayed, prompting you to enter another promise. Click **Yes** to enter another promise.

7 Click **Close**.

### Exercise 2–Find All Due Balances

To view a list of accounts with balances due:

1 On the main menu, click the **Collections Activity** button. The **Collections Activity for <Date>** window is displayed.

2 Select the accounts you want to view and click **OK**. The **Collections Activity** window is displayed.

3 In the **Responsible Party** field, a list of responsible parties whose accounts fit the criteria you selected is displayed. Select a name in the list to view a party's information. In front of the responsible party name, either **(Due)** for balance due or **(P/D)** for accounts with a promise and balance due is displayed. **(Prm)** is displayed in front of the responsible party name when you search only for **Accounts with Promise Due**.

4 Select **View** from the menu bar to customize the information displayed in the **Collections Activity** window. Choose from the following options:

- **Contacted Parties**–Displays accounts previously contacted since the last financial roll.
- **Promises for Patients**–Displays promises for the selected patient or for all patients connected to the currently displayed responsible party.
- **Totals/Overview**–Displays account totals or an account overview as the current view.
- **Checks/Overdraft**–Displays auto-payment information.
- **Promise History/Changed Promises/Future Promises**–Select the types of promises you want to display in the promise grid. Future promises are displayed by default. Select **Promise History** to view deleted and paid promises. Select **Changed Promises** to include promises that have been changed in the view.



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- **Show Options**–Shows the display options you selected in the **Collections Activity For <date>** window.

5 Use the function buttons at the bottom of the window to perform additional financial functions:

- **Statement**–Generates a statement for the account.
- **Adjust**–Makes an adjustment to the account.
- **Totals**–Opens the **Financial Functions–Totals** window for the account.
- **Ledger**–Displays ledger information for the account.
- **Contract**–Displays the **Financial Functions–Contracts and Payment Plans** window.

6 Click **Close**.



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Lesson 16

# Working with Insurance Claims

This lesson includes:


- Understanding Claims on page 127
- Claim Processing on page 130
- Posting Bulk Payments on page 132


Using the insurance functions, you can:

- Create insurance claims, both manually and automatically.
- Print all of your insurance claims at one time.
- Post insurance payments to patient accounts from a single bulk reimbursement check.
- You can also use the OrthoTrac electronic claim service to transmit claims electronically. If you purchased this service, an Electronic Services technician will contact you to schedule an appointment for configuring the service and training you to use it.

## Understanding Claims

You can enter, edit, and print the following types of insurance claims:

- Pre-Authorization
- Actual
- One-Time
- Continuation of Treatment

You can create a claim manually, or the software can automatically create a claim when you set up a patient contract or post specific procedure codes. See the online help for more information.

## Creating a Claim Manually

To create an insurance claim manually:



**Claims**

1 In the patient chart or from one of the financial functions windows, click the **Claims** button. The **Claims** window is displayed.

2 Click **Add New**.

If there is more than one policy holder for the patient, the **Policy Holders** window is displayed. Select a policy holder and click **OK**. If the policy holder has more than one carrier, the **Insurance Plans** window is displayed. Select the carrier and click **OK**. The **Add New Claim** window is displayed.

**OR**

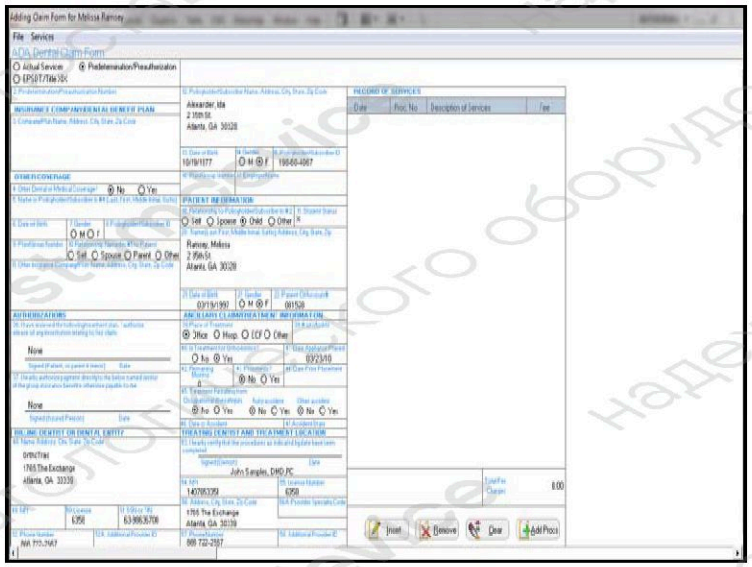
If there is a single policy holder and only one carrier, the **Add New Claim** window is displayed.

3 Select the type of claim you want to create and click **OK**. The **Adding Claim Form** window is displayed.



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**Note**

The insurance carrier can reject claims with no first visit date.

4 Click in the fields to enter information. Many of the fields are populated automatically by the software, but you might need to fill in these fields:

- Pre-Authorization claims–**First Visit Date** and **Description of Services**
- Actual claims–**First Visit Date**, **Months Tx. Remaining**, and **Description of Services**
- One-Time claims–**First Visit Date** and **Description of Services**
- Continuation of Treatment claims–**First Visit Date** and **Months Tx. Remaining**



**Claims**

5 Enter information in these fields:

- **First Visit Date**–Type the date of the patient's first visit.
- **Description of Services**–Type the treatment description, using these buttons:
  - **Insert Line**
  - **Delete Line**
  - **Clear Line**
  - **Add Procedures**
  - **Remarks**
- **Months Tx. Remaining**–Type the number of months left in the patient's treatment. This field is often mandatory for a carrier to process Continuation of Treatment claims.

6 Use the buttons at the bottom of the window to add additional information to the claim:

- **Print**
- **Tooth Chart**
- **History**

7 Click **OK**.

## Creating a Continuation of Treatment Claim

Before you can generate Continuation of Treatment claims, you must set up a claim for each patient requiring Continuation of Treatment claims.

To create a Continuation of Treatment claim:

1 In the patient chart or a financial functions window, click the **Claims** button. The **Claims** window is displayed.

2 Click **Add New**.



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If there is more than one policy holder for the patient, the **Policy Holders** window is displayed. Select a policy holder and click **OK**. If the policy holder has more than one carrier, the **Insurance Plans** window is displayed. Select the carrier and click **OK**. The **Add New Claim** window is displayed.

**OR**

If there is a single policy holder and only one carrier, the **Add New Claim** window is displayed.

3 Select **AAO Cont of Tx** and click **OK**. The **Adding Claim Form** window is displayed.

4 In the **ANCILLARY CLAIM/TREATMENT INFORMATION** section, complete the information in the following fields, as applicable:

- **Date Appl. Placed**–This field is automatically populated with the banding date from the **Patient Information** window, if the date was entered there.
- **First Visit Date**–Type the date of the first visit.
- **Months Tx. Remaining**–Type the number of months of treatment remaining.
- **Description of Services**–Leave this field blank. When you generate Continuation of Treatment claims each month, the software automatically adds the information you set up in the **Insurance Claim Options** window.

5 Click **History**. The **Claim History** window is displayed.




6 Complete the information in the following fields:

- **Last Cont of Tx.**–Type the last Continuation of Treatment date.

  If this is a new claim, enter the patient's banding date.

  Press Tab. The software populates the **Next Cont of Tx.** field, depending on the frequency for filing. Press Tab.

- **Monthly Charge**–Type the amount charged per month.

  Always enter the ***monthly*** amount, even if the frequency is quarterly.

- **Frequency**–Defaults to the setting you entered in the **Carrier Maintenance** window for this insurance carrier. If **None** is displayed, use the drop-down list to select a frequency.

**Note**

Select **Remove All Printed Claims** only if you do not want to keep copies of your printed claims until they have been paid.

7 Click **Close**.

8 Click **OK**.



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# Claim Processing

At specified times, you will process insurance claims.

## Printing Paper Claims Manually

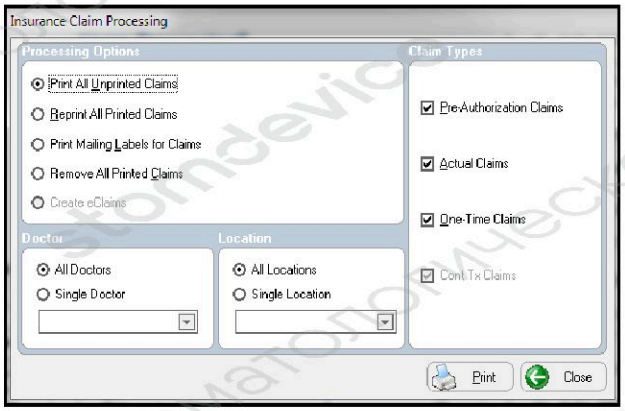


**Insurance Functions**

To print Pre-Authorization, One-Time, and Actual claims on preprinted forms:

1 Click the **Insurance Functions** button on the main menu. The **Insurance Functions** menu is displayed.

2 Select **Claim Processing**. The **Insurance Claim Processing** window is displayed.




**Tip**

Selecting **Custom Date** displays a calendar, enabling you to enter the date of your choice.

3 In the **Processing Options** section, select **Print All Unprinted Claims**.

**Note**

Select **Delete All Printed Claims** only if you do not want to keep copies of printed claims.

4 In the **Claim Types** section, select the type of claims to print.

5 In the **Doctor** section, select to print claims for all doctors or a single doctor. If you choose **Single Doctor**, select the name of the doctor from the drop-down list. This option is not enabled if your practice has only one doctor.

6 In the **Location** section, print claims for all locations or a single location. If you choose **Single Location**, select the name of the location from the drop-down list. This option is not enabled if your practice has only one location.

7 Click **Print**. The **Print Insurance Claim** window is displayed.

8 In the **Date on Signature Lines** section, select an option. You can select **No Date**, **System Date** (the current date), or **Custom Date**.

9 Click **OK**.

## Printing Mailing Labels for Insurance Claims

After printing patient insurance claims, you can print mailing labels for the claims.

To print mailing labels:

1 In the **Insurance Claim Processing** window, select **Print Mailing Labels for Claims** in the **Processing Options** section.

2 In the **Claim Types** section, select the type of claims to print.

3 In the **Doctor** section, select to print labels for all doctors or a single doctor. If you choose **Single Doctor**, select the name of the doctor from the drop-down list. This option is not enabled if your practice has only one doctor.

4 In the **Location** section, select to print labels for all locations or a single location. If you choose **Single Location**, select the name of the location from the drop-down list. This option is not enabled if your practice has only one location.

5 Click **Print**. The **Print Setup** window is displayed.

6 Click **OK**.



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## Printing an Individual Claim

While you typically print claims in batches, it is possible to print individual claims.

To print an individual claim:

1 In the patient chart or from one of the financial functions windows, click the **Claims** button. The **Claims** window is displayed.

2 If there is more than one claim in the window, select the claim you want to print and click **Print**. The **Print Insurance Claim** window is displayed.

3 In the **Date on Signature Lines** section, select an option.

4 Click **OK**.

## Processing Continuation of Treatment Claims

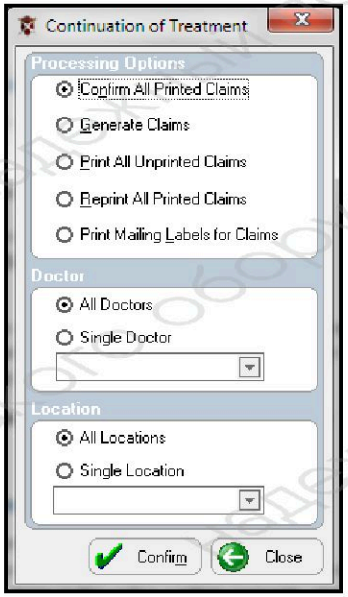
Continuation of Treatment claims are generated monthly. When you are ready to process the Continuation of Treatment claims for the month, process the claims in this order: confirm, generate, and print.

You can enter Continuation of Treatment claims at any time during the month. Each claim generates only one time per month unless changes have been made on the claim.

To process Continuation of Treatment claims:

1 Click the **Insurance Functions** button on the main menu. The **Insurance Functions** menu is displayed.

2 Select **Continuation of Treatment**. The **Continuation of Treatment** window is displayed.




3 In the **Processing Options** section, select **Confirm All Printed Claims** and click **Confirm**. A message is displayed. Click **Yes**.

4 When the claims are confirmed, a message is displayed. Click **Yes**. Select **Generate Claims** in the **Processing Options** section and click **Generate**.



**Claims/Insurance Functions**

**Note**

Be sure to load insurance claim forms in your printer. The software does not print the actual form.

**Important**

**Select Confirm All Printed Claims only one time each month. If you confirm after printing your claims for the current month, you cannot reprint the claims.**



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5 When the software finishes generating the claims, a message is displayed. Click **OK**. In the **Processing Options** section, select **Print All Unprinted Claims** and click **Print**.

6 To print mailing labels for these claims, select **Print Mailing Labels for Claims** and click **Print**.

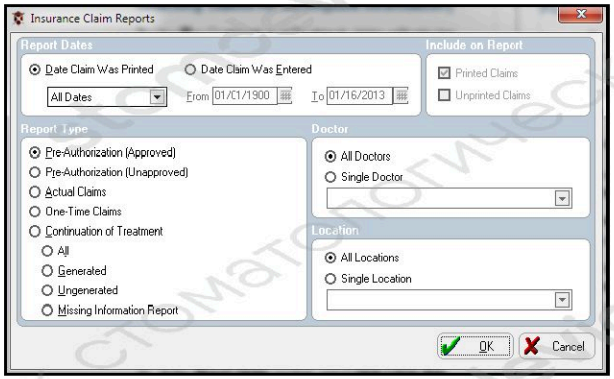
## Checking Claims for Incomplete Information

To check for Continuation of Treatment claims with missing information after generating your claims:


Insurance Functions

1 Click the **Insurance Functions** button on the main menu. The **Insurance Functions** menu is displayed.

2 Select **Claim Reports**. The **Insurance Claim Reports** window is displayed.




3 In the **Report Dates** section, select **Date Claim Was Entered.**

**Note**

Be sure to load insurance claim forms in your printer. The software does not print the actual form.

4 In the **Report Type** section, select **Continuation of Treatment** and **Missing Information Report**. Click **OK** twice.

5 Open the chart of a patient with missing insurance information and click the **Claims** button. The **Claims** window is displayed.

6 Select the claim and click **Change** to add the missing information. Click **OK**.

7 Return to the **Continuation of Treatment** window and re-generate the claims you have corrected by selecting **Generate Claims** and clicking **Generate**.

## Posting Bulk Payments

Insurance companies send one bulk reimbursement check with the payment EOB breakdown by responsible/patient party. You must post the payments to the different patient accounts. The bulk payment feature gives you the ability to post payments for all patients insured by a specific carrier at one time.

To post a bulk payment:

1 Click the **Insurance Functions** button on the main menu. The **Insurance Functions** menu is displayed.

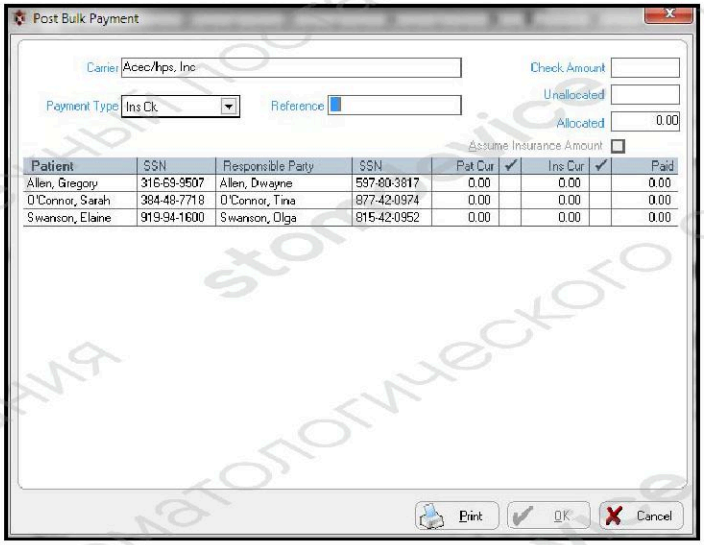
2 Select **Post Bulk Payment**. The **OrthoTrac Software Carrier Lookup** window is displayed.

3 Select the insurance company that sent you the check and click **OK**. The **Post Bulk Payment** window is displayed. All patients assigned to that carrier, regardless of employer plan, are displayed



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4 In the **Reference** field, type the reference number from the check. Press Enter.

5 In the **Check Amount** field, type the amount of the check. Press Enter. The **Unallocated** amount is displayed (the same as the **Check Amount**), and the **Allocated** amount is **$0.00**.

6 If the amount displayed matches what is printed on the check's EOB for that patient, press Enter. If the EOB lists a different amount, type the new amount and press Enter. A window containing **Patient** and **Insurance** options is displayed.

7 Press Enter or click **Apply** to apply the check amount to the selected account. To apply the payment to the other account balance, select the account and click **Apply**. A checkmark is displayed next to the balance paid.

8 Select the next patient on the list.

If the **Assume Insurance Amount** option is selected at the bottom of the **Post Bulk Payment** window, the insurance current balance for all patients in the list is automatically entered as the payment amount. If you need to post a different amount, type it in the field.

9 When all payments have been posted and the **Unallocated** amount is **$0.00**, click **OK**.

10 Click **Print** to print a report.

**Tip**

If all patients have been posted and the unallocated amount is not $0.00, click **Print**, compare the printout to the EOB, and make corrections as needed.

**Note**

Be sure to allocate all of the check. If you exit from the **Post Bulk Payment** window before you are finished, all of your entries are removed.

**Important**

**Be sure carrier names are consistent. Patients are selected for the bulk payment list based on the carrier name, regardless of employer.**



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## Skill Sharpeners

### Exercise 1—Create a Continuation of Treatment Claim

You want to set up a Continuation of Treatment claim for a patient before you generate the claim.

To create a Continuation of Treatment claim:

1 In a patient's chart, click the **Claims** button. The **Claims** window is displayed.

2 Click **Add New**.

If there is more than one policy holder for the patient, the **Policy Holders** window is displayed. Select a policy holder and click **OK**. If the policy holder has more than one carrier, the **Insurance Plans** window is displayed. Select the carrier and click **OK**. The **Add New Claim** window is displayed.

**OR**

If there is a single policy holder and only one carrier, the **Add New Claim** window is displayed.

3 Select **AAO Cont of Tx** and click **OK**. The **Adding Claim Form** window is displayed.

4 In the **ANCILLARY CLAIM/TREATMENT INFORMATION** section, type the number of months of treatment remaining in the **Remaining Months** field.

5 Click **History**. The **Claim History** window is displayed.

6 Complete the information in these fields:

- **Last Cont of Tx.**—Type the last Continuation of Treatment date.

  Press Tab. The software automatically populates the **Next Cont of Tx.** field, depending on the frequency for filing. Press Tab.

- **Monthly Charge**—Type the amount charged per month.

- **Frequency**—Defaults to the setting you entered in the **Carrier Maintenance** window for this insurance carrier. If **None** is displayed, use the drop-down list to select a frequency.

7 Click **Close** and **OK**.

### Exercise 2—Process a Continuation of Treatment Claim

To process Continuation of Treatment claims:

1 Click the **Insurance Functions** button on the main menu. The **Insurance Functions** menu is displayed.

2 Select **Continuation of Treatment**. The **Continuation of Treatment** window is displayed.

3 In the **Processing Options** section, select **Confirm All Printed Claims** and click **Confirm**. A message is displayed. Click **Yes**.

4 When the claims are confirmed, a message is displayed. Click **Yes**. Select **Generate Claims** in the **Processing Options** section and click **Generate**.

5 When the software finishes generating the claims, a message is displayed. Click **OK**. In the **Processing Options** section, select **Print All Unprinted Claims** and click **Print**.

6 To print mailing labels for these claims, select **Print Mailing Labels for Claims** and click **Print**.



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Lesson 17

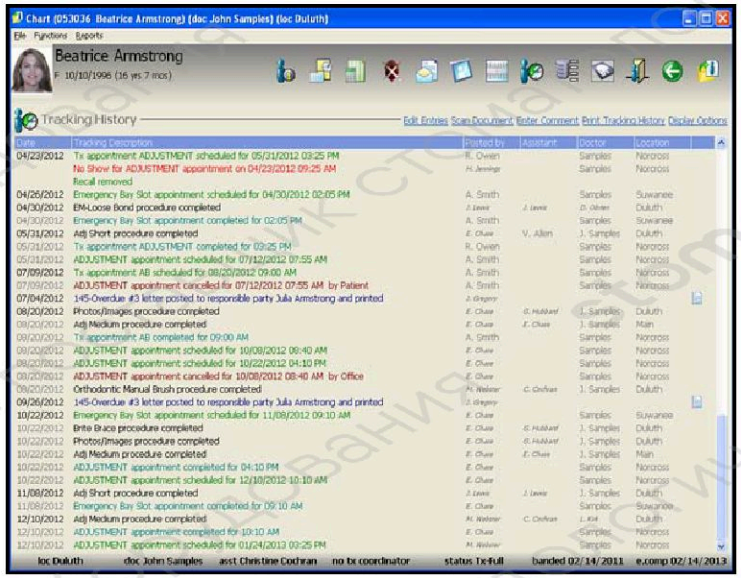
# Tracking Patients and Correspondence

This lesson includes:


- Creating Patient Tracking Reports on page 137
- Tracking Word Processing and Communications on page 138


Use the patient tracking function to view logged records of appointments, posted letters, and procedures performed for a patient. In addition, if you have orthodontic imaging software, version 8.0.5 or higher, you can enable the document storage feature.

To display the history of a patient, click the **Patient Tracking** button on the patient chart menu. The **Tracking History** window is displayed.




Each item in the patient history is dated, and the person who posted the entry, assistant, doctor, and location are displayed.

## Functions

The following functions in the **Tracking History** window enable you to perform additional tasks:

- **Edit Entries**
- **Scan Document**
- **Enter Comment**
- **Print Tracking History**
- **Display Options**

## Removing Entries

To remove an entry displayed in the **Tracking History** window:

1. Click **Edit Entries**.
2. Click the red **X** next to the entry you want to remove. A message is displayed.
3. Click **Yes**. The tracking entry is removed.
4. Click **Done**.



**Patient Tracking**

**Note**

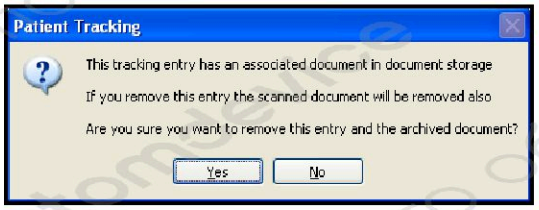
Display options are saved for each workstation individually.



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If the entry has a document attached, the following message is displayed:




## Scanning Documents

To scan a document:

1 Click **Scan Document**. The **Select Type** window is displayed.

2 Select the document type from the drop-down list.

**OR**

Select **New** to add a new type to the list.

3 Click **Scan** to acquire a document from your local scanner.

**OR**

Click **Browse** to acquire a document that is saved to a file.

**Note**

Scanned documents can be moved to another patient's tracking history by clicking the green arrow next to the entry. The **CS OrthoTrac Patient Lookup** window is displayed. Select the appropriate patient, and the document is moved.

## Entering Comments

To enter comments in the **Tracking History** window:

1 Click **Enter Comment**. The **Patient Tracking Comment** window is displayed.

2 Type your comment in the field and click **OK**.

To create a HIPAA comment:

1 Click **Enter HIPAA Comment**. The **HIPAA Privacy Comment** window is displayed.

2 Select the type of comment you want to add. Valid options are:

- **HIPAA acknowledgement**
- **HIPAA Consent**
- **HIPAA Authorization**
- **HIPAA Disclosure**
- **HIPAA Complaint**

3 To document the HIPAA privacy acknowledgement for a patient, select **HIPAA acknowledgement**, type a comment, and click **OK**.

## Printing Tracking Histories

To print a copy of the patient tracking history:

1 In the **Tracking History** window, click **Print**. The **Patient Tracking Print Options** window is displayed.

2 Select **Print Report**, **Preview Report**, or **Export Contents**.

3 Click **OK**.

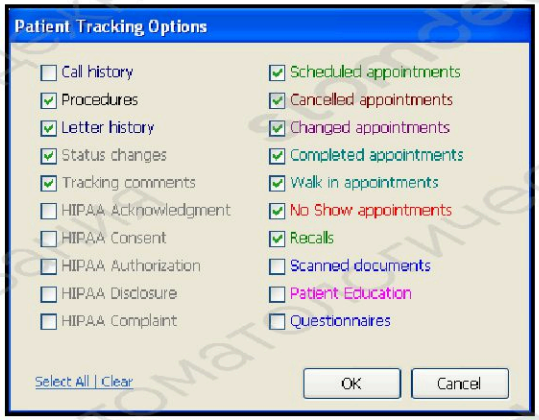


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## Display Options

To select the options you want to display in the **Tracking History** window, click **Display Options**. The **Patient Tracking Options** window is displayed.

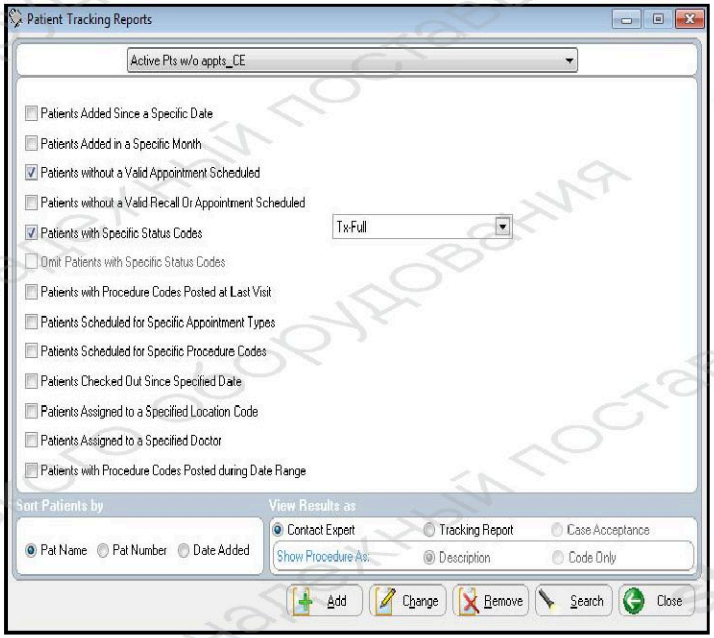



## Creating Patient Tracking Reports

You can set up customized reports—which can be viewed as contact experts or in standard report format—that summarize the tracking history of all patients.

To create a patient tracking report:

1 On the main menu, select **Reports > Patient Tracking**. The **Patient Tracking Reports** window is displayed.




2 From the drop-down list, click **<Add New Report>** and type a name for the new report.

3 Select the patients to include in the report.

4 Select the sorting order for the report, whether to view results as a **Contact Expert** or a **Tracking report**, and whether to show procedures by **Code Only** or **Description.** Click **Apply**.

**Note**

The display options are saved per workstation.

**Note**

Select **Code Only** to produce a shorter report.



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Word Processing

5 Click **Search**.

- If you selected **Tracking Report**, the **Print Options** window is displayed. Select **Print** or **Preview**.
- If you selected **Contact Expert**, the search results are loaded in the **Contact Expert** window.

## Changing Existing Patient Tracking Reports

When running an existing report, you must change the dates to reflect the current date range. You can edit previously saved reports to remove or add options. To change patient tracking reports:

1 In the **Patient Tracking Reports** window, select the report from the drop-down list.

2 Click **Change**.

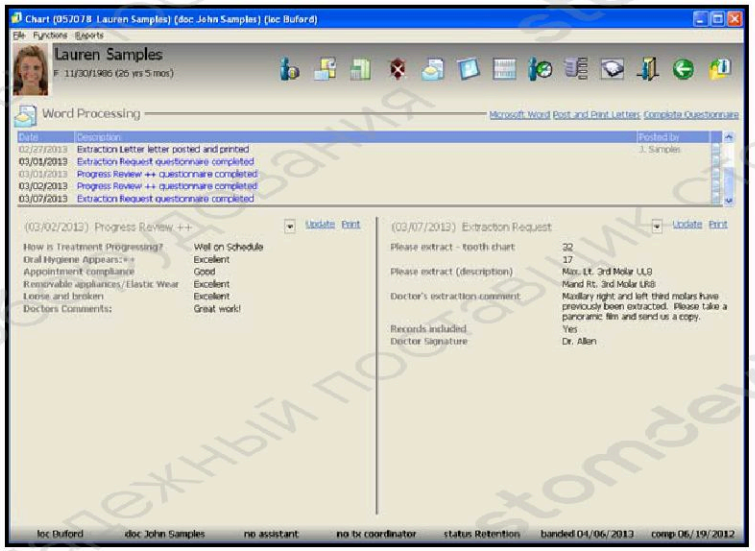
3 Make changes to the options and click **Apply**.

**Note**

You must have orthodontic imaging software, version 8.0.5 or higher. The document storage feature must be enabled in system maintenance to keep permanent electronic copies of your correspondence.

## Tracking Word Processing and Communications

To display the word processing and communication history for a patient, click the **Word Processing** button in the patient chart. The **Word Processing** window is displayed.




The following options are displayed in the window:

- **Microsoft Word**–Opens a new word document outside of CS OrthoTrac.
- **Post and Print Letters**–Opens the **Post and Print Letters** window.
- **Complete Questionnaire**–Opens the **Execute Questionnaire** window.

Each letter and questionnaire in the history window is dated and linked to a PDF file of the document.



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When you complete a questionnaire, the details are displayed in the lower sections of the **Word Processing** window. The last two questionnaires completed are also displayed.

To update a questionnaire displayed in the window, click **Update**.

To print a questionnaire displayed in the window, click **Print**.

Letters must be confirmed to be displayed in the history window. Questionnaires are displayed upon completion.

**Note**

Refresh the **Word Processing** window to view changes.



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## Skill Sharpener

### Exercise 1—Print a Patient History

Your office has performed numerous orthodontic procedures on Patti Patient and you want to view and print her appointment and procedure history.

To view and print Patti's history:

1 Open Patti Patient's chart and click the **Patient Tracking** button. The **Tracking History** window is displayed.

2 Review the history in the center of the window.

3 Click **Display Options**, select the options you want to display in the report, and click **OK**.

4 Click **Enter Comment**, type a comment, and click **OK**.

5 Click **Print Tracking History**. The **Patient Tracking** print options window is displayed.

6 Select **Print Report** and click **OK**.



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Lesson 18

# Using Contact Experts and Office Expert

This lesson includes:


- Creating Contact Experts on page 141
- Using Office Expert on page 144
- Linking Contact Experts with Office Expert on page 146


Contact experts enable you to use existing or custom reports to obtain specific information from your database.

Office expert enables you to track and process business activities.

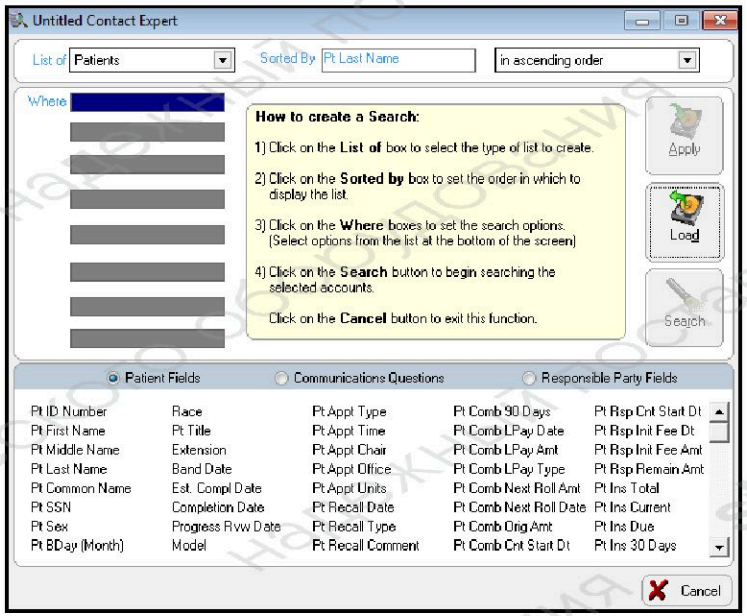
## Creating Contact Experts

Use contact experts to organize and process lists generated from patient tracking reports or from office expert items. You can send letters and cards, print labels, and print reports for everyone on the list or for specific people on the list.

### Patient Fields

Using the patient fields, you can create lists of patients and search for specific patient information.

To access contact experts on the main menu, click the **Contact Experts** button. The **Contact Expert** window is displayed.




To create a contact expert report of patients:

1. In the **List of** field, select **Patients**.
2. Click in the **Sorted by** field and select a sort option and the order in which to display the list.
3. Click in the **Where** field, select a field option from the list and the conditions or criteria to apply to the search.
4. To save the search options, click **Apply** and type a name for the search. Click **OK** and **Search**.

**Note**

You must set up contact experts before they can be linked to an office expert report.

**Note**

You can sort only by fields that correspond to the type of list you are creating; for example, lists of patients can be sorted by patient or communications fields.

**Tip**

To change a search option, select it and click a new field in the list, or change the criteria you selected for that option.



**Office Expert**

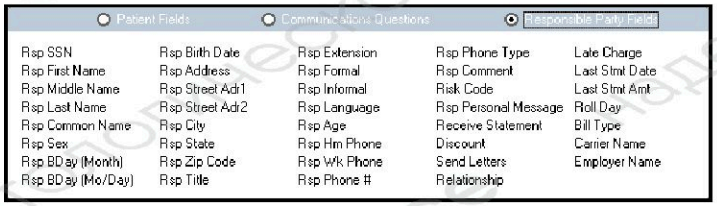


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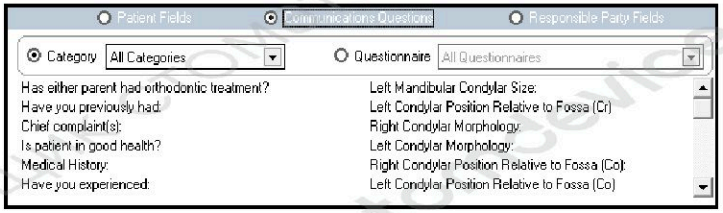
## Responsible Party Fields

You can create lists of responsible parties and search for specific responsible party information in patient lists. To create a contact expert report of responsible parties, follow the steps in "Creating Contact Experts" on page 141, but in the **List of** field, select **Responsible Parties**. To select from a list of responsible party search parameters, click the **Responsible Party Fields** option and select from the fields at the bottom of the window.



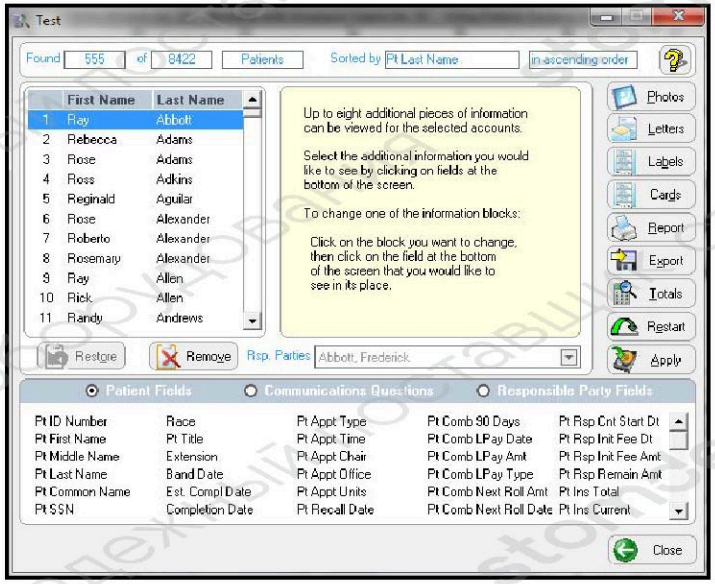

## Communications Questions

To search for a list of patients or responsible parties who provide specific answers to communications questions, follow the steps in "Creating Contact Experts" on page 141; however, select **Communications Questions** and select from the options in the **Category** or **Questionnaire** fields.




## Using Search Results

The **Search Results** window contains details about the patients/responsible parties returned by the search, which are to be displayed in the report.




To select additional output fields:

1 Select **Patient Fields**, **Communications Questions**, or **Responsible Party Fields**, and select from the corresponding fields at the bottom of the window.

2 Click **Report**. The **Print Options** window is displayed. Select to print, view, or export the report and click **OK**.



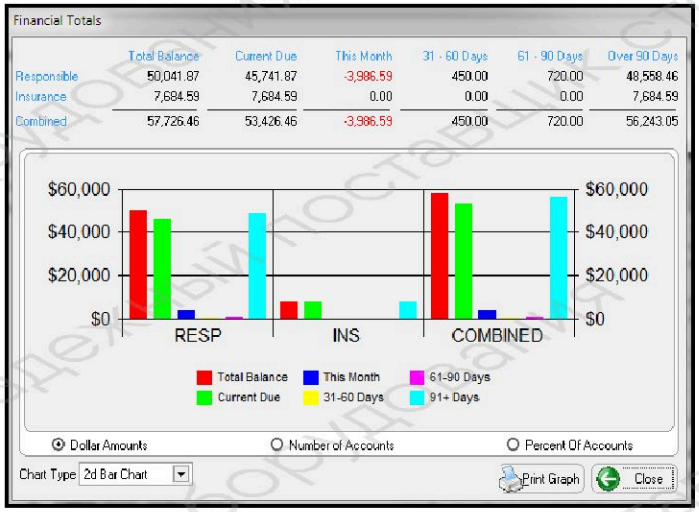
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## Additional Search Result Information

You can perform additional tasks with the names the software retrieves from the initial search by using the following fields and buttons:

- **First Name, Last Name**–Provides additional information about a patient in the search list when selected.
- **Remove**–Removes a patient from the active search list.
- **Restore**–Adds a patient to the active search list again.
- **Question Mark**–Displays the search options used to create the list.
- **Photos**–Displays photographs of the patients on the list, if snapshots are available.
- **Letters**–Posts letters to the patients found by the search.
- **Labels**–Prints mailing labels.
- **Cards**–Prints recall cards.
- **Report**–Prints reports and exports search results and **.csv** files for use in other applications, such as spreadsheets.
- **Export**–Exports the report information for use with HouseCalls appointment confirmation software.
- **Totals**–Displays the **Financial Totals** window, which displays financial information for all patients in the list




The balances and aging of accounts are displayed at the top of the window, along with the dollar amount for each category.

To change the display of the **Financial Totals** window, select from the following options:

- Click the buttons at the bottom of the window to change the view from **Dollar Amounts** to **Number of Accounts** or **Percent of Accounts**.
- In the **Chart Type** field, use the drop-down list to select from two-dimensional or three-dimensional bar or pie charts.
- Click **Print Graph** to print the totals and the 2D bar graph for each of the views.

- **Restart**–Starts another search or modifies the current search. If a search fails to find the correct accounts, click **Restart** to return to the **Contact Expert** window and enter new search parameters.

**Tip**

If a patient has more than one responsible party, use the drop-down list in the **Rsp. Parties** field to view information for the other responsible parties.



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**Tip**

When creating contact experts for use with office expert, use a naming convention so the search sets are grouped together.

- **Apply**–Saves the search. To name the search, type a name and click **OK**.
- **Close**–Exits the contact experts function. To save the search, click **Yes**. Type a name for the attribute set and click **OK**.

## Loading a Previous Search

To load a search you saved previously:

1 In the initial **Contact Expert** window, click **Load**. A list of previously saved searches is displayed.

2 Click the search and click **OK**. The software populates the window with the search parameters, which you can edit.

3 Click **Search**. The **Search Database** window is displayed, asking if you want to use the previous results of the search.

4 Click **Yes** to use the previous search results. The resulting list displays the same results as the last time the search was saved.

**OR**

Click **No** to search your files with the same options and create an updated list of patients who meet the same criteria.



**Office Expert**

# Using Office Expert

Office expert helps you perform daily activities by generating a list of items that might need your attention.

Office expert provides the following information about each item:

- **Priority**–Urgent (pink background), Important (yellow background), and FYI (green background)
- **Area**–Financial, Insurance Claims, Patient/Treatment, Schedule, and Word Processing
- **Description**–Name of the report
- **Last Action**–Date and the name of the person who performed the task

## Office Expert Notifications

Each day, the software prompts the first staff member who logs in to run office expert. If the staff member selects **Yes**, the software updates the office expert information. If the staff member selects **No**, the software prompts the next person who logs in to run office expert. If the initial user clicks the **Office Expert** button before anyone else logs in, a message is displayed.

To turn on office expert notifications, select **Maintenance/Set-up > System Maintenance**. The **System Options** window is displayed. In the **Miscellaneous Options** section, select **Office Expert Notification**.

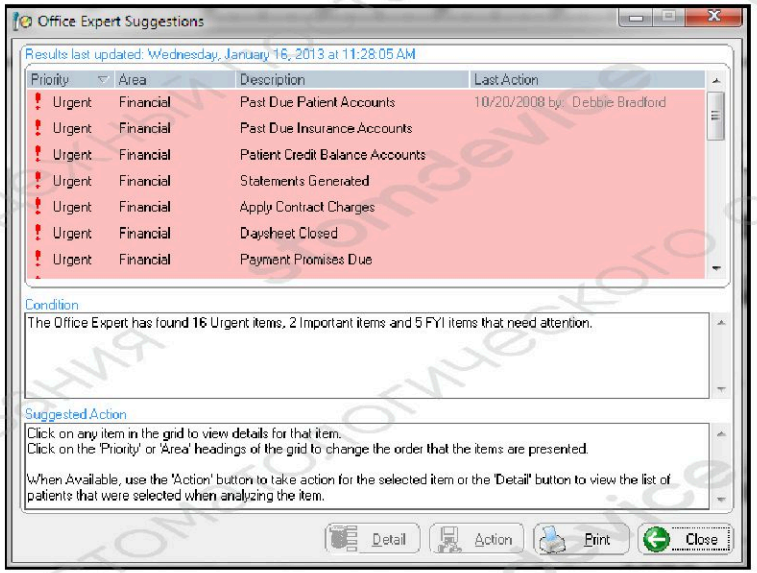
To access office expert from the main menu, click the **Office Expert** button.



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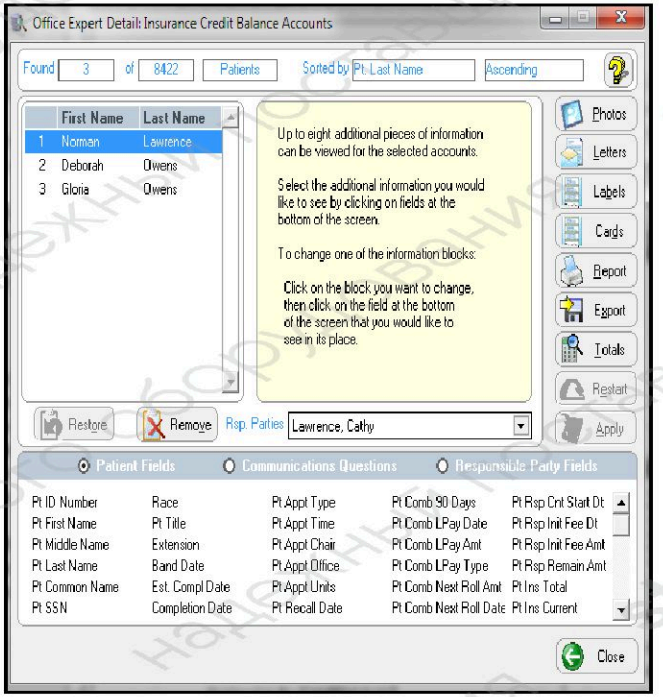
The **Office Expert Suggestions** window is displayed.




The **Office Expert Suggestions** window displays items sorted by priority in the following order: Urgent, Important, and FYI. Your security permissions in the software limit the number and types of reports you see.

Select from the following options:

- To view details about an item, click the item. Information is displayed in the **Condition** field.
- To change the order of items, click the **Priority** or **Area** headers.
- To perform the action displayed in the **Suggested Action** field, select an item and click **Action**.
- To view a list of patients or responsible parties related to an item, click **Detail**. The **Office Expert Detail** window is displayed.




Select from options at the bottom of the window to obtain additional information about the patients or responsible parties.

- To print a summary of all the reports you have permission to receive, click **Print**. The **Print Office Expert** window is displayed.

  Select the type of items and the type of action you want to print on the report and click **OK**. The **Office Expert Suggestions Print Options** window is displayed. Click **OK**.

**Note**

Clicking **Action** indicates to the software that the action is performed. Even if you decide not to perform the action, the date and your name display in the **Last Action** section of the **Office Experts Suggestions** window.



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## Linking Contact Experts with Office Expert

To link a contact expert with office expert:

1 Set up a contact expert with identical parameters as in an office expert report.

2 Name the contact expert, using your naming convention. The name can be 25 characters in length.

3 In the **Office Expert Setup** window, select a report and select **Contact Expert** in the **Action** field.

4 In the **Contact Expert** field, select the corresponding saved search.



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## Skill Sharpeners

### Exercise 1—Find Missing Information

A woman calls your office and leaves a message on your answering machine. She identifies herself as "Barbara, Susan's mother" and wants you to call her back; however, the phone number she gave in the message is not understandable. How can you find the phone number so you can call Susan's mother?

To create a contact expert report:

1 On the main menu, click the **Contact Experts** button. The **Contact Expert** window is displayed.

2 In the **List of** field, select **Patients**.

3 Click in the **Sorted by** field and select a sort option from the fields at the bottom of the window and the order in which to display the list.

4 Click in the **Where** field and select **Pt First Name** from the **Patient Fields** options at the bottom of the window. From the drop-down list in the **Where** field, select **is equal to**. In the **equals** field, type **Susan** and press Enter twice.

5 Click **Responsible Party Fields** and select **Rsp First Name** from the options at the bottom of the window. From the drop-down list in the **Where** field, select **is equal to**. In the **equals** field, type **Barbara** and press Enter twice.

6 Click **Search**. The software displays the search results in the box at the left side of the window.

7 Click **Responsible Party Fields** and select **Rsp Hm Phone** and **Rsp Wk Phone** from the **Responsible Party Fields** options at the bottom of the window. The software displays the phone numbers at the right side of the window.

8 To print the information, click **Report**. The **Print Options** window is displayed. Select to view, print, or export the report type.

### Exercise 2—Find Incorrect Data

You have duplicate zip codes in the database; for example, there are two Atlanta 30339 zip codes. You want to view a list of the patient charts that contain each Atlanta zip code and correct the charts on the shortest list. How can you find the patients and responsible parties who have the incorrect zip code in their chart, so you can enter the correct code and delete the incorrect code from the software?

To create a contact expert to find patient charts with incorrect data:

1 On the main menu, click the **Contact Experts** button. The **Contact Expert** window is displayed.

2 In the **List of** field, select **Patients**.

3 Click in the **Sorted by** field and select a sort option from the fields at the bottom of the window and the order in which to display the list.

4 Click in the **Where** field and select **Pt Zip Code** from the **Patient Fields** options at the bottom of the window. From the drop-down list in the **Where** field, select **is equal to**. From the drop-down list in the **equals** field, select the first Atlanta zip code entry on which you want to report.

5 Click **Search**. The search results are displayed in the box at the left of the window.

6 Note the number of patients having this first Atlanta zip code. In this example, there are three patients with the first Atlanta zip code in their charts.



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7 Repeat the steps listed above, using the second Atlanta zip code option. In this example, there are 46 patients with the second Atlanta zip code in their charts, so it would be easier to change the three charts that use the first zip code.

8 Repeat the search using the first Atlanta zip code. The three patient names are displayed at the left of the window.

9 In the box at the left of the window, double-click on the first patient name. A drop-down menu is displayed. Select **Open Patient Chart**.

10 Click the **Patient Information** button. The **Patient Information** window is displayed. Double-click on the address field.

11 Change the zip code in the **Edit Address** window. In this example, be sure to select the *second* Atlanta option.

12 The software prompts you, asking if you want to change this address for all others associated with this address. Click **Yes**.

After you have changed the zip code in the three charts, you should delete the unused, incorrect zip code. Follow these steps:

- Select **Maintenance/Set-up > System Maintenance > Zip Codes**.
- Select the *first* Atlanta zip code and click **Remove**.
- Click **Yes** when prompted to delete the incorrect zip code.

## Exercise 3–Use Database Fields Information

Your office tracks patient schools and sports using the database fields function. It's time for the Elm Street Middle School basketball season to start, and the doctor wants to send a letter to those patients who play basketball, reminding them that they should wear a mouth guard. How can you generate a list of patients who play basketball at Elm Street Middle School?

To use a contact expert to access database fields information:

1 On the main menu, click the **Contact Experts** button. The **Contact Expert** window is displayed.

2 In the **List of** field, select **Patients**.

3 Click in the **Sorted by** field and select a sort option from the fields at the bottom of the window and the order in which to display the list.

4 Click in the **Where** field and select **Schools** from the **Patient Fields** options at the bottom of the window. From the drop-down list in the **Where** field, select **is equal to**. From the drop-down list in the **equals** field, select **Elm Street Middle School**.

5 Select **Sports** from the **Patient Fields** options at the bottom of the window. From the drop-down list in the **Where** field, select **is equal to**. From the drop-down list in the **equals** field, select **Basketball**.

6 Click **Search**. The search results are displayed in the box at the left of the window.

7 Click an option.



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Lesson 19

# Using the Word Processing Module

This lesson includes:


- Setting Up Letters on page 149
- Managing Word Processing Letters on page 152
- Printing Envelopes on page 154
- E-mailing Letters on page 155


The OrthoTrac word processing module uses Microsoft Word software to handle its word processing functions.

The word processing module works with the OrthoTrac communications module and enables you to merge information from communications questionnaires into specialized letters.

In addition, if you have orthodontic imaging software, version 8.0.5 or higher, you can enable the document storage feature in system maintenance, patient tracking, and charting. Using the document storage feature, you can keep permanent electronic copies of all of your correspondence.

## Setting Up Letters

The word processing module contains many letters that you can use to correspond with patients and doctors in your practice. Using merge fields and different letter styles, you can customize these letters. You can also create your own letters.

The electronic signature feature enables patients, responsible parties, and staff members to sign documents electronically using a tablet or signing pad.

## Toolbar Buttons

Table 1 shows you the buttons available in the word processing module.

**Table 1 Word Processing Module Toolbar Buttons**

| | | | |
|---|---|---|---|
|  | Merge Field |  | Multiple Fields |
|  | Response to Questionnaire |  | Patient Gender |
|  | Responsible Gender |  | Orthodontic Imaging |
|  | Insert Date |  | Mail Merge Insert Fill In |
|  | Insert Frame |  | Save and Close |

**Tip**

If your office uses the electronic signature pad, patients, responsible parties, and staff members can sign documents electronically using a tablet or signing pad.



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## Using Merge Fields, Addressee Types, and Salutation Types



Word Processing

The word processing module contains merge fields that enable you to produce customized correspondence. These merge fields function in the same way as Microsoft Word merge fields.

Each letter you add, depending on the type of letter and the addressee, can have both a patient version and a responsible party version. The addressee types include:

- **Standard**
- **Patient**
- **Financial**
- **Responsible Party**
- **Doctor**
- **Referring Doctor**
- **Referring Patient**
- **Referring Responsible Party**

The salutation types include:

- **Formal**
- **Semi-Formal**
- **Informal**

See the online help for additional information about using merge fields, addressee types, and salutation types.

**Tip**

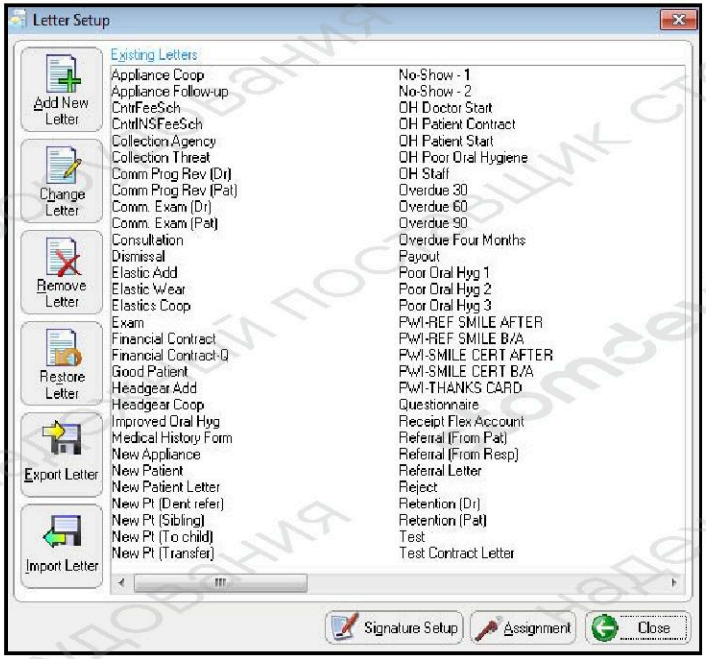
Use the **Import Letter** button to import letter text from other Word documents.

## Adding New Letters

You can create letters that are customized for your office.

To add a new letter:

1 Click the **Word Processing** button on the main menu. The **Word Processing** menu is displayed. Select **Letter Setup**. The **Letter Setup** window is displayed.




2 Click **Add New Letter**. The **Add Letter** window is displayed.

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

4 In the **Addressee** field, select the addressee type.

5 In the **Salutation** field, select the appropriate salutation.

6 In the **Signature** field, select who will sign the letter, **Doctor** or **Staff**.



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7 In the **Envelopes** section, select **None** or **Print Separately**. If you select **Print Separately**, the software prompts you to print the envelope after the letter is printed.

8 Click **Add Responsible** to add the text for the responsible party version of the letter. The **Add New Letter** window is displayed and defaults to the template for the type of letter you are adding. Click **OK**. The Microsoft Word software opens, and the letter is displayed.

9 Begin typing the letter to delete the highlighted text.

10 To merge patient information into the letter, click an OrthoTrac software merge field button.

11 Select the merge fields you want to include. Click **OK**.

12 To merge gender-specific information into the letter, click a gender merge field button, select the option next to the pronouns you want to insert, and click **OK**.

13 When you are setting up a letter and select the pronoun option for the patient or responsible party, the pronoun merge field in the letter is displayed as "her," regardless of the gender you selected. The software uses the gender entered in the **Sex** field on the patient chart to determine the appropriate pronoun to insert for the patient or the responsible party.

To add custom male or female text, select the **Custom** option and type the information in the **Male Text** or **Female Text** fields in the **Custom** section.

14 Check your spelling and grammar using the Microsoft Word software spell-check program.

15 Click the **Save and Close** button. The **Add Letter** window is displayed.

16 Click **Add Patient Letter** to add the text for the patient version of the letter. The **Add Letter** message window is displayed, asking if you would like to copy the existing letter.

17 Click **Yes**.

18 Edit the letter as necessary.

19 Click the **Save and Close** button. The **Add Letter** window is displayed.

20 Click **OK** twice.

**Important**

**The software assigns the letter a name — do not change it. This name is different from the description you gave the letter.**

## Changing Letters

To change a letter:



**Merge Fields**

1 Click the **Word Processing** button on the main menu. The **Word Processing** menu is displayed. Select **Letter Setup**. The **Letter Setup** window is displayed.

2 In the **Existing Letters** window, select the letter you want to edit and click **Change Letter**. The **Change Letter** window is displayed.



**Gender Merge Fields**

3 Follow the steps used to create a letter. See "Adding New Letters" on page 150 for more information.

## Assigning Letters

There are two ways to post letters automatically:

- You can set up your procedure codes to post letters automatically to a patient account when procedures are posted.
- You can assign letters to specific functions and conditions. When the functions are performed or when the conditions exist, the software prompts you to post the



**Save and Close**



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assigned letters. The software can prompt you to post letters in the following instances:

- **Add New Patient**
- **Patient Referrals**
- **ePatient**
- **No-Show**

To assign letters to specific functions and conditions:



**Word Processing**

1 Click the **Word Processing** button on the main menu. The **Word Processing** menu is displayed.

2 Select **Letter Setup**. The **Letter Setup** window is displayed.

3 Click **Assignment**. The **Letter Assignments** window is displayed.

4 Click the option button of the function or condition to which you want to assign a letter, and use the drop-down list to select the letter.

5 Use the buttons on the side of the window to make changes to the letters you assign:

- **Select Letter**
- **Add New Letter**
- **Change Letter**
- **Remove Letter**

6 Click **Close**.

**Tip**

To add letters to a drop-down list, select **<Include New Letter>** from the list or click **Select Letter** to open the **Include New Letter** window and select the letters you want to add.

## Managing Word Processing Letters

When using the word processing module, there are several processes you perform frequently, including posting letters (merging patient information with the letter to produce a customized letter), reviewing letters, printing letters, and confirming letters.

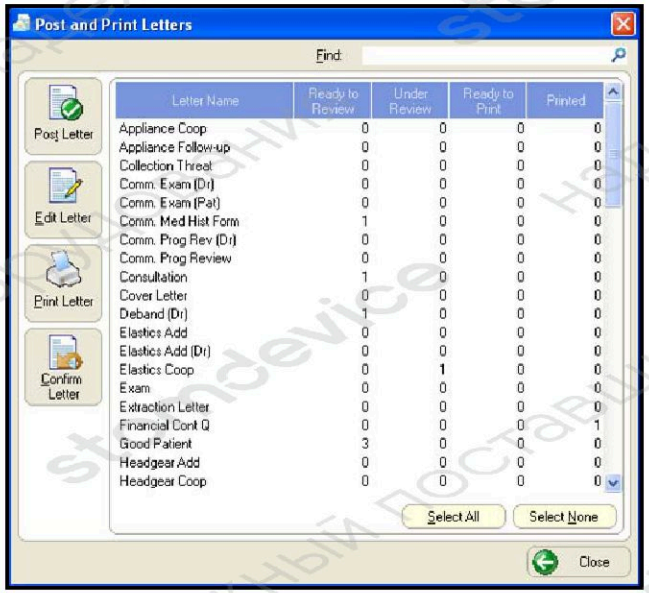
### Posting Letters

To post a letter:

1 Click the **Word Processing** button on the main menu. The **Word Processing** menu is displayed. Select **Post and Print Letters**.

**OR**

Click the **Word Processing** button in the patient chart. The **Word Processing** menu is displayed. Select **Post and Print Letters**. The **Post and Print Letters** window is displayed.






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2 Select the letters you want to post. To post more than one letter type at a time, hold the Ctrl key down and select additional letters to post. Click **Post Letter**.

The software updates the number in the **Ready to Review** column.

## Reviewing and Editing Letters

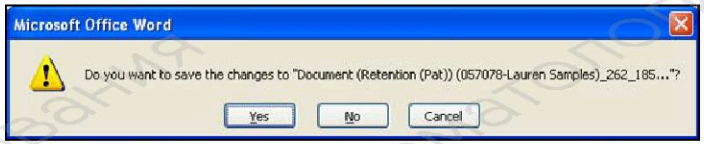
To view a list of patients due to receive a letter, to edit a letter, or to delete a letter posted in error:

1 In the **Post and Print Letters** window, double-click the number in the **Ready to Review** column. The **Selected Letters** window is displayed, and a list contains the names of all patients/responsible parties due to receive this letter.

2 Select a name and click **Edit Letter**.

3 Edit the letter as necessary.

4 Close the letter. A message is displayed.




5 Click **Yes**. The **Edit Letter** window is displayed.




6 To make additional changes, click **No**. The software updates the number in the **Under Review** column, and you can make changes.

**OR**

To print the letter, click **Yes**. The software updates the number in the **Ready to Print** column, and the letter can no longer be edited.

Letters that have already been edited, but are still open for review, are listed in the **Under Review** column. To edit a letter in the **Under Review** column, double-click the number and follow the preceding steps.

## Printing Posted Letters

**Important**

**Microsoft Word must be installed on your computer to print letters.**

To print or reprint letters:

1 In the **Post and Print Letters** window, double-click the number in the **Ready to Print** column. The **Selected Letters** window is displayed, and a list displays the patients and responsible parties due to receive this letter.

2 Select an option:

- To print, preview, or e-mail letters for all names on the list, click **Select All** and click **Print Letter**. The **Print Options** window is displayed. Select an option and click **OK**.
- To deselect all names on the list, click **Select None**.
- To print or reprint the letter for specific names on the list, select the names and click **Print Letter**. The **Print Options** window is displayed. Select **Print Letter(s)** and click **OK**.
- To delete letters that have been posted in error, select the individual names and click **Remove Letter**. The **Clear Letters** message is displayed. Click **Yes**.



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**Tip**

Letters may be printed from the **Ready to Review**, **Under Review** and **Ready to Print** columns.

If the letter you are printing is set to print envelopes, the letters print first, and then the software prompts you to print the envelopes.

## Printing Multiple Letters and Multiple Letter Types

You can print multiple letters and multiple letter types at one time by using the **Print Letter** button in the **Post and Print Letters** window.

**Tip**

To select multiple letter types, press the Ctrl key and click each type.

To print multiple letters and letter types:

1 In the **Post and Print Letters** window, select each of the letter types you want to print, or click **Select All**.

2 Click **Print Letter**.

## Confirming Printed Letters

Confirming a printed letter makes an entry in a patient's tracking history.

To confirm letters:

1 In the **Post and Print Letters** window, double-click the number in the **Printed** column for the letter type you want to confirm. The **Selected Letters** window is displayed.

2 Click **Select All** or select individual names on the list.

3 Click **Confirm Letter.** A message is displayed. Click **Yes**.

### Confirming Multiple Printed Letters and Multiple Letter Types



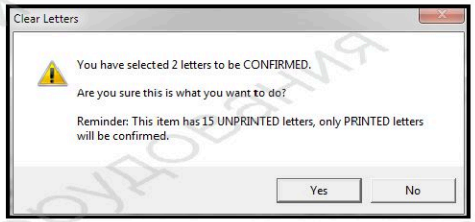
**Word Processing**

You can confirm multiple printed letters and multiple letter types at one time by using the **Confirm Letter** button on the **Post and Print Letters** window.

To confirm multiple printed letters and letter types:

1 In the **Post and Print Letters** window, select each of the letter types you have printed, or click **Select All**, and then click **Confirm Letter**.

A message is displayed, asking if you are sure you want to confirm multiple letters.




2 Click **Yes**. The software makes an entry in each patient's tracking history, noting that the particular letter has been sent.

## Printing Envelopes

The **Add Letter** window and the **Change Letter** window contain an **Envelopes** section, where you enable the software to print envelopes. The default is set to **None**.

If your printer can print envelopes, select **Print Separately** and click **OK**. After the letters print, the software prompts you to print the envelopes.

### Printing Stand-Alone Envelopes

To print stand-alone envelopes:

1 Click the **Word Processing** button on the main menu. The **Word Processing** menu is displayed. Select **Print Envelope**.

2 Select the addressee type. The lookup window is displayed.



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3 Select the addressee and click **OK**. The envelope prints, and the lookup window is displayed again.

4 Select another addressee and print another envelope, or click **Cancel**.

## E-mailing Letters

Instead of printing a letter, you can send the letter by e-mail, using Microsoft Outlook or Microsoft Outlook Express software.

To send a patient, responsible party, or doctor a letter by e-mail, you must first add that person's e-mail address as a phone number of type EM (e-mail).

### Printing Letters with E-mail Addresses

You have two options when sending letters by e-mail:

- **Use Associated E-mail addresses**—If the addressee has an e-mail address set up in the software, you can send the letter as e-mail by selecting **Print Letters** and **Use Associated E-mail addresses**.
- **E-Mail Letter(s)**—If you have several letters to be e-mailed to the same e-mail address, select **E-Mail Letter(s)** and use the drop-down list to select an e-mail address.

To send letters as e-mail:

1 In the **Post and Print Letters** window, select the letter you want to print and click **Print Letter**. The **Print Options** window is displayed.

2 Select an option:

- Click **Print Letter(s)**, select **Use Associated E-mail addresses**, and click **OK**. The **Set E-Mail Message** window is displayed.

Type the message you want to appear in the body of your e-mail and click **OK**.

- To print all selected letters to a single e-mail address, select **E-Mail Letter(s)**. Select the e-mail address from the list or add a new e-mail address and click **OK**.

**Note**

If you select **Print Preview** and print from Word, the software does not prompt you to print envelopes.



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## Skill Sharpeners

### Exercise 1—Add a Letter

You want to create a letter reminding patients that headgear must be worn regularly, and you need both a patient version and a responsible party version. How do you create a customized letter for your practice?

To add a letter called Wear Headgear:

1 Click the **Word Processing** button on the main menu. The **Word Processing** menu is displayed. Select **Letter Setup**. The **Letter Setup** window is displayed.

2 Click **Add Letter**. The **Add Letter** window is displayed.

3 In the **Letter Description** field, type **Wear Headgear**.

4 In the **Addressee** field, select **Standard**, which uses both patient and responsible party letters.

5 In the **Salutation** field, select **Formal "Dear Mr./Ms. <<Last Name>>"**.

6 In the **Signature** field, select **Doctor**.

7 In the **Envelopes** section, select **None**.

8 Click **Add Responsible** to add the text for the responsible party version of the letter. The **Add New Letter** window is displayed and defaults to the template for the type of letter you are adding.

9 Click **OK**. The Microsoft Word software opens, and the letter is displayed with the date, inside name, address, and salutation.

10 Replace the highlighted text with the text below, and use the **Merge Field** and **Patient Gender** buttons to insert merge fields.

**At <<PatientNamePossessive>> last appointment, we added headgear to <<her>> appliance.**

**We have instructed <<PatientFirstName>> on wearing the headgear and have made it as comfortable as possible. It must be worn a minimum of 10-12 hours each day. Please give <<PatientFirstName>> the firm encouragement needed at home for the daily and consistent wear of this addition to the treatment.**

**If you have any questions concerning this phase of <<her>> treatment, feel free to call me.**

11 Check your spelling and grammar using the Word spell-check program.

12 Click the **Save and Close** button to save your letter and exit Word. The software returns you to the **Add Letter** window.

13 Click **Add Patient Letter** to add the text for the patient version of the letter. The **Add Letter** message window is displayed, asking if you would like to copy the existing letter. Click **Yes**.

14 Using the steps listed above, edit the copied text so that it reads as follows:

**At your last appointment, we added headgear to your appliance.**

**We have instructed you on wearing the headgear. It must be worn a minimum of 10-12 hours each day.**

**If you have any questions concerning this phase of your treatment, feel free to call us.**



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### Exercise 2—Post and Print a Letter

You want to send the headgear letter you created to a patient. How do you merge the patient information with the letter and print it?

To post and print a letter:

1 Open the chart for the patient to whom you want to send the letter.

2 Click the **Word Processing** button. The **Word Processing** menu is displayed. Select **Post and Print Letters**. The **Post and Print Letters** window is displayed

3 Select **Wear Headgear** from the list of available letters. Click **Post Letter**. The software updates the number in the **Ready to Review** column.

4 Click **Print Letter**. The **Print Options** window is displayed.

5 Select an option and click **OK**.



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Lesson 20

# Using Communications Questionnaires

This lesson includes:


- Changing an Existing Questionnaire on page 159
- Adding a New Questionnaire on page 162
- Executing a Questionnaire on page 165


The communications module enables you to create customized letters for patients, responsible parties, or referring doctors by responding to detailed questionnaires for each patient. The communications module links the answers in a questionnaire to narrative phrases or paragraphs, which are inserted in your letters as text.

## Changing an Existing Questionnaire

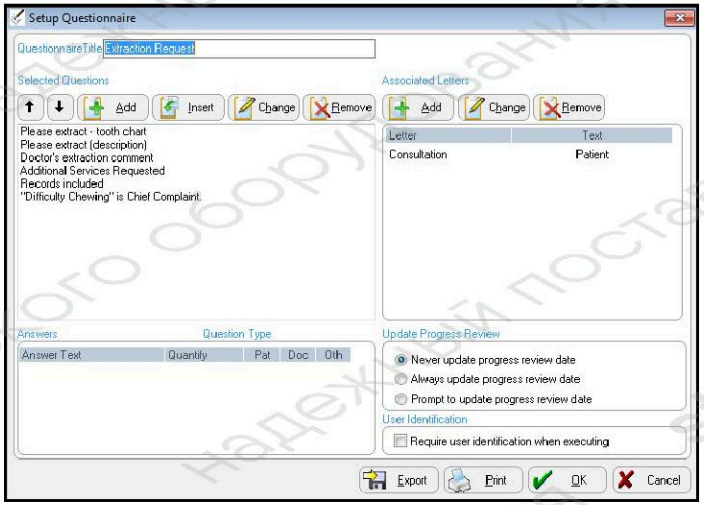
The communications module comes with three communications questionnaires: Initial Exam, Pre-Exam/Medical History, and Progress Review. You can use these questionnaires as they are, or you can modify them.

To change an existing questionnaire:

1 Click the **Word Processing** button on the main menu. The **Word Processing** menu is displayed.

2 Select **Communications Setup**. The **Select Questionnaire** window is displayed.

3 Select the questionnaire type you want to change and click **Change**. The **Setup Questionnaire** window is displayed.




The questions are displayed in the **Selected Questions** section. Any letters linked to this questionnaire are displayed in the **Associated Letters** section.

When you select a question, all of the possible answers to that question are displayed in the **Answers** section, as well as the question type, whether the answers are quantified, and if letter text is available for that answer.


**Word Processing**

For each answer option, you can enter patient, doctor, or other text to print in the letters. An **x** indicates no letter text, and a checkmark indicates that letter text has been entered.



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In the **Update Progress Review** section, you can select from:

- **Never update progress review date**
- **Always update progress review date**
- **Prompt to update progress review date**

In the **User Identification** section, you can select **Require user identification when executing** to have the software prompt the user to select his name before executing the questionnaire.

**Note**

Questions that you add are listed at the end of the questionnaire. To reposition a question, select the question and use the up arrow to move it.

4 Use the function buttons in the **Setup Questionnaire** window to:

- Change the order of questions.
- Add a new question or select a question from the existing database.
- Insert a new question or select a question from the existing database.
- Change the selected question and answers.
- Delete a question.

## Changing the Question Order on a Questionnaire

To change the order of the questions:

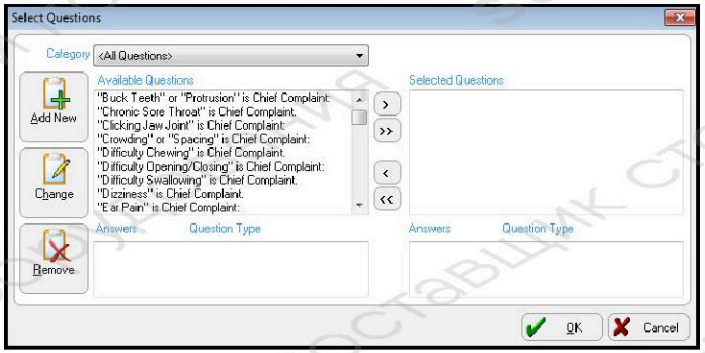
1 In the **Setup Questionnaire** window, select the question you want to move and click the **Up** or **Down** arrows.

2 Click **OK**.

## Adding an Existing Question to a Questionnaire

To add an existing question to the questionnaire:

1 In the **Setup Questionnaire** window, click **Add** under **Selected Questions**. The **Select Questions** window is displayed.




The questions in the database display alphabetically by default. You can display a single category of questions by selecting it from the **Category** drop-down list.

2 In the **Available Questions** section, select the question and click the right arrow button.

3 Click **OK**.



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## Inserting a Question Within a Questionnaire

To insert a question in the questionnaire:

1 In the **Setup Questionnaire** window, select the area on the list in which you want to insert the question and click **Insert**. The **Communications Maintenance** message is displayed.

2 Click **Yes**. The **Select Questions** window is displayed.

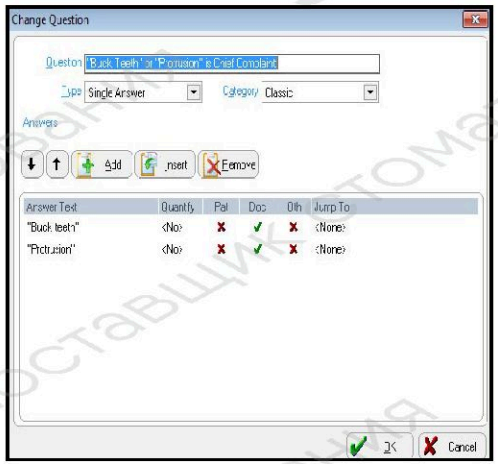
3 Select the question and click the right arrow button.

4 Click **OK**.

## Adding an Answer to a Question

To add an answer to a question:

1 In the **Setup Questionnaire** window, select the question for which you want to add an answer and click **Change** under **Selected Questions**. The **Change Question** window is displayed.




2 Click **Add**. A blank line is selected in the **Answers** section.

3 In the **Answer Text** column, type the answer.

4 If you need to quantify this answer, in the **Quantify** column, click **<No>** (the default) to change the field to **Yes**. The **Quantify Prompt** window is displayed.

5 In the **Quantify Prompt** window, enter the text you want to use as a prompt for this answer. Click **OK**. The **Set Patient Text** window is displayed.

6 Type the information about the patient's treatment or diagnosis in laymen's terms for the patient or responsible party.

- If the text should include a quantified amount, type **<<quantify>>** where the amount should print. For example, overjet is **<<quantify>> mm**.
- You can include patient information in letter text by typing the merge field surrounded by << >>. For example, type **<<PatientFirstName>>** in the letter text to have the patient's first name print in the letter.
- Repeat the steps for each answer to the question.
- Click **OK**. The **Set Doctor Text** window is displayed.

**Important**

**If you have associated letters attached to the questionnaire, you must update the letters with additional question and response fields.**

7 Type the information about the patient's treatment or diagnosis in clinical terms for a referring dentist or a doctor.

- If the text should include a quantified amount, type **<<quantify>>** where the amount should print.
- You can include patient information in letter text by typing the merge field surrounded by << >>.
- Repeat the steps for each answer to the question.
- Click **OK**. The **Set Other Text** window is displayed.

**Note**

A green checkmark is displayed in the column if you entered patient, doctor, or other text. A red x is displayed if you have not entered text.



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8 Add other text, if appropriate.

- If the text should include a quantified amount, type **<<quantify>>** where the amount should print.
- You can include patient information in letter text by typing the merge field surrounded by <<>>.
- Repeat the steps for each answer to the question.

9 Click **OK**.

## Changing or Deleting an Answer to a Question

To change or delete an answer:

1 In the **Setup Questionnaire** window, select the question you want to change and click **Change** under **Selected Questions**. The **Change Question** window is displayed.

2 Use the function buttons to make the following changes:

- To reposition an answer–Select the answer you want to move, click the **Up** or **Down** arrows, and click **OK**.
- To add an answer–Click **Add**. See "Adding an Answer to a Question" on page 161 for more information.
- To insert an answer–Select the area above where you want to insert the answer and click **Insert**. Type your answer and follow the steps under "Adding an Answer to a Question" on page 161.
- To delete an answer–Select the answer you want to delete and click **Remove**. The **Communications Maintenance** message is displayed. Click **Yes**.
- To change the answer text–Select the answer, retype the answer text, and click **OK**.
- To add or edit the letter text–In the **Pat**, **Doc**, or **Oth** columns, click the x or the checkmark to display the corresponding text box, type the new text, and click **OK**.

### Deleting a Question from a Questionnaire

To delete a question from the questionnaire:

1 In the **Setup Questionnaire** window, select the question you want to remove from the questionnaire and click **Remove** under **Selected Questions**. The **Communications Maintenance** message is displayed.

2 Click **Yes**.

## Adding a New Questionnaire

To add a questionnaire:

1 Click the **Word Processing** button on the main menu. The **Word Processing** menu is displayed.

2 Select **Communications Setup**. The **Select Questionnaire** window is displayed.

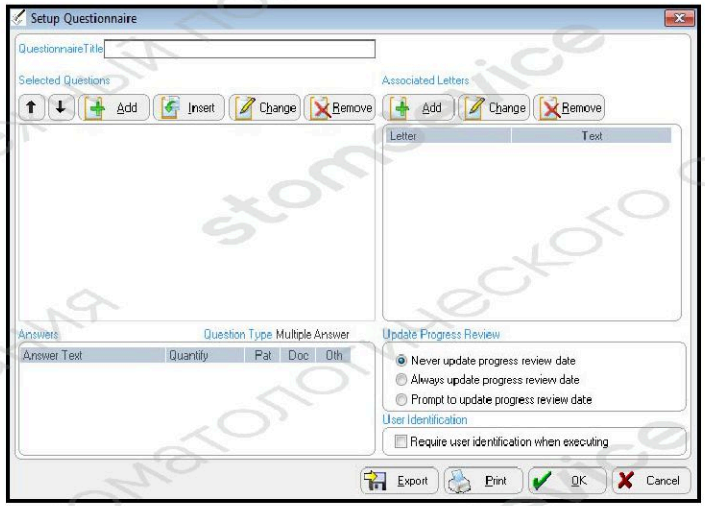
3 Click **Add New**. The **Add Questionnaire** window is displayed.



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4 Select **Add A New Questionnaire** and click **OK**. The **Setup Questionnaire** window is displayed.




5 In the **Questionnaire Title** field, type a title. Press Tab or click **Add** or **Insert**. The **Select Questions** window is displayed.

6 In the **Available Questions** section, select the questions you want to add and click the right arrow button. Click **OK**.

7 Check the order of your questions in the **Selected Questions** list and reposition them, if necessary, by using the arrow buttons.

8 Click **Print**. Use this printout when you assign letters to this questionnaire. See "Assigning Letters to a Questionnaire" on page 164 for more information.

## Adding Headers to a Questionnaire

To add headers:

1 In the **Setup Questionnaire** window, select the question below the area in which you want to insert the header and click **Insert**. The **Communications Maintenance** message is displayed.

2 Click **Yes**. The **Select Questions** window is displayed.

3 In the **Category** field, select **Headers** from the drop-down list. Select the header you want to insert and click the right arrow button.

4 Click **OK**.

## Adding a New Question to an Existing Questionnaire

You can customize an existing questionnaire to suit the needs of your practice by adding your own questions. When you add a question, you have several answer types from which to choose. Following is a description of the available answer types:

- **Multiple Answer**–Gives you several options and enables you to choose one or more answers.
- **Single Answer**–Gives you several options, but you can select only one answer.
- **Answer Prompt**–Prompts you to enter a short, quantified answer.
- **Tooth Chart**–Enables you to answer a question about specific teeth by clicking on the corresponding teeth on the chart.



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- **Narratives**–Enables you to enter a narrative description. A narrative question can include up to five pre-coded narratives.
- **Header**–Used only on the questionnaire to subdivide the questions into groups.
- **Procedure**–Enables you to list the procedures performed during the appointment. When you click or press Tab in the question box, the **Procedures** window is displayed, enabling you to select from the list of procedures.
- **Patient Field**–Supplies patient information and is automatically populated with information from the patient chart. If the information is incorrect or does not exist, you can type the answer in the questionnaire, and the information is updated in the patient chart.
- **Dated Narratives**–Enables you to enter a narrative description, which the software dates.

To add a new question to an existing questionnaire:

1 In the **Select Questions** window, click **Add**. The **Add Question** window is displayed.

2 In the **Question** field, enter the question text.

3 In the **Type** field, select the question type from the drop-down list.

4 In the **Category** field, select the category type from the drop-down list. To add a new category, click the arrow button and select **<Add Category>** from the drop-down list.

5 Click **OK**.

**Tip**

If you have added questions to a questionnaire or made changes to the order in which questions are displayed, verify that the merge fields in any letters assigned to the questionnaire are in the order that you want them to appear.

## Assigning Letters to a Questionnaire

To assign letters to a questionnaire:

1 In the **Setup Questionnaire** window, in the **Associated Letters** section, click **Add**. The **Select Letter** window is displayed.

2 In the **Letters** section, select the letter you want to assign.

3 In the **Letter Text** section, indicate which letter text should print in the letter–**Patient**, **Doctor**, or **Other**.

4 Click **OK** to select an existing letter.

**OR**

Click **Add** to add a new letter. The **Add Letter** window is displayed. See "Adding New Letters" on page 150 for more information.

5 In the body of the letter, click the merge field buttons to insert responses into the letter. Select the **Response to Questionnaire** button to display the **Communications Questionnaire Responses** window, which lets you insert a block of responses into the letter.

In the **Start with Question #** field, type the number of the first question you want to display in the letter. In the **End with Question #** field, type the number of the last question you want to display in the letter. Click **OK**.

6 To set up the headers, type the header from your questionnaire printout directly into the letter.



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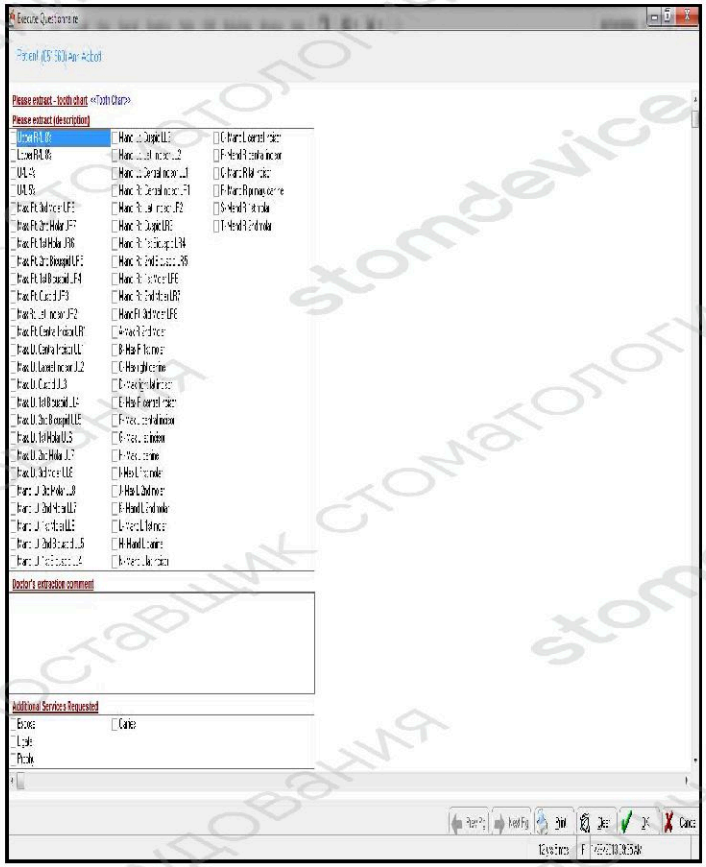
## Executing a Questionnaire

To execute a questionnaire:

1 Click the **Word Processing** button in the patient chart. The **Word Processing** menu is displayed.

2 Select **Execute Questionnaire**. The **Execute Questionnaire** window is displayed.

3 Select the questionnaire you want to execute and click **Select**. The questionnaire is displayed.



4 Each question type is displayed in a different format. The following options are available:

- **Single Answer**–Click on the answer to select it, or use the arrow keys to select the answer and press Enter or Tab to go to the next question. After you make a selection, the software prompts you with the next question.
- **Answer Prompt**–The type of answer required for this question is displayed to the right of the answer prompt. Press Enter to go to the next question.
- **Tooth Chart**–The tooth chart is displayed, prompting you to click on the teeth that correspond to the question. Click **OK** to go to the next question.
- **Multi-Answer**–Click the box next to each answer. Press Enter to go to the next question.
- **Narrative**–Type the answer in the narrative window. If the narrative has been set up with predefined answers, click on the answer at the top of the window to display it. You can edit the answer, or you can type a new answer.
- **Header**–To move to the section of a questionnaire under a particular header, click on the header, and the screen scrolls to that section of the questionnaire.
- **Procedure**–Click or press Tab in the question box to display the **Procedures** window. Select the procedures that were performed and click **OK**. The procedures display on the questionnaire on the same line or in a list, depending on the style you selected when the question was created.



**Word Processing**

**Tip**

To remove a response to a single-answer question, select it and press the Esc key.



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- **Patient Field**–Automatically populated when the information exists in the patient chart. If the information does not exist or is incorrect, type the answer in the questionnaire, and the information is updated in the patient chart.
- **Dated Narratives**–Type the answer in the window. When you save the answer, the software dates the narrative entry. If the narrative has been set up with predefined answers, you can click on the answer at the top of the window to display it. You can edit the answer.

5 Click **Print** to print a questionnaire summary report for the patient.

6 Click **OK** to complete the questionnaire. If letters are assigned to this questionnaire, the **Assigned Letters** window is displayed.

7 Click in the **Action** column next to each letter to select **Post**, **Print**, or **None** and click **OK**.



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## Skill Sharpener

### Exercise 1—Add an answer to a questionnaire.

When using a questionnaire, you want to answer a question with an answer type that is not available. You want to add an answer with a quantifying prompt. How do you do this?

To add an answer to a question:

1 Click the **Word Processing** button on the main menu. The **Word Processing** menu is displayed. Select **Communications Setup**. The **Select Questionnaire** window is displayed.

2 Select the questionnaire type you want to change and click **Change**. The **Setup Questionnaire** window is displayed.

3 Select the question for which you want to add an answer and click **Change**. The **Change Question** window is displayed.

4 Click **Add**. A blank line is selected in the **Answers** section.

5 In the **Answer Text** column, type the answer.

6 In the **Quantify** column, click **<No>** (the default) to set the field to **Yes**. The **Quantify Prompt** window is displayed.

7 In the **Quantify Prompt** window, enter the text you want to use as a quantifying prompt for this answer.

Click **OK**. The **Set Patient Text** window is displayed.

8 Type the information about the patient's treatment or diagnosis for the patient or responsible party.

- If the text should include a quantified amount, type **<<quantify>>** where the amount should print. For example, overjet is **<<quantify>> mm**.
- You can include patient information in letter text by typing the merge field surrounded by << >>. For example, type **<<PatientFirstName>>** in the letter text to have the patient's first name print in the letter.
- Repeat the above steps, when applicable, for each possible answer to the question.

When you are finished entering patient text, click **OK**. The **Set Doctor Text** window is displayed.

9 Type the information about the patient's treatment or diagnosis in clinical terms for the referring dentist or a doctor to whom you are referring the patient.

- If the text should include a quantified amount, type **<<quantify>>** where the amount should print.
- You can include patient information in letter text by typing the merge field surrounded by << >>.
- Repeat the above steps, when applicable, for each possible answer to the question.

When you are finished entering doctor text, click **OK**. The **Set Other Text** window is displayed.

10 In the **Set Other Text** window, add other text, if appropriate.

- If the text should include a quantified amount, type **<<quantify>>** where the amount should print.
- You can include patient information in letter text by typing the merge field surrounded by << >>.
- Repeat the above steps, when applicable, for each possible answer to the question.

11 Click **OK**.



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Lesson 21

# Using the Checklist Function

This lesson includes:


- Marking Tasks as Completed on page 170
- Maintaining the Checklist on page 170


Use the checklist function to view and maintain a list of administrative tasks. You can perform many of the items in the **Checklist** window automatically, including the following:

- Aged Receivable Reports
- Bulk Insurance Payments
- Collections System
- Coupon Books
- Database Searches
- Daysheet
- Word Processing Letters
- Ledger Scan Reports
- Miscellaneous Reports
- Patient Labels - New Patients
- Patient Tracking Reports
- Referral Reports
- Roll
- Schedule Reports
- Statements
- Timeclock
- Insurance Claim Processing
- Schedule Maintenance - Add Days
- Treatment Card History

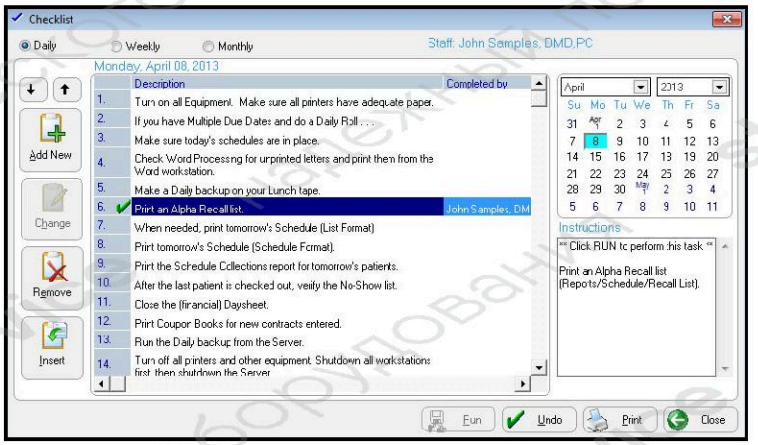
After performing a task, mark the task as completed, and the software records your name, the date, and time you completed the task.

You can also add your own tasks to the list to suit the specific needs of your office and staff.

To access the checklist function from the main menu, click the **Checklist** button. The **Checklist** window for daily tasks is displayed.



**Checklist**






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The window displays the current day and date, a description of tasks to be completed, a calendar, instructions on how to complete the tasks, and function buttons.

- To view additional tasks in the list, use the vertical scroll bar in the center of the window. To view the names of the staff members who completed the tasks and the dates the tasks were completed, use the horizontal scroll bar at the bottom.
- To view the checklist for a different day, click the day on the calendar.
- To view the weekly or monthly checklist, select the corresponding option at the top of the window.

When you select a task, instructions on how to complete that task are displayed in the **Instructions** section of the **Checklist** window. For items that are set to run OrthoTrac functions, the message ****Click RUN to perform this task.**** is displayed.

## Marking Tasks as Completed

To mark tasks as completed:

1 Select the description for the task in the **Description** section and click **Done**.

When you select an uncompleted task that is set to run an OrthoTrac software function, the **Run** button is enabled. To complete the task and mark the task as completed, click **Run**.

2 Click **Print** to print the checklist.

3 Click **Close**.

**Tip**

If you complete an item in error, select the item and click **Undo**.

**Note**

The **Run** button is not enabled if a task set to run a function is already marked as completed.

## Maintaining the Checklist

To change the position of tasks in the list, to add a new task to the list, to change an existing task, or to insert a task, use the function buttons on the left side of the **Checklist** window. The buttons include:

- **Up Arrow**
- **Down Arrow**
- **Add New**
- **Change**
- **Remove**
- **Insert**

### Changing the Order of Tasks

To change the position of a task in the list:

1 In the **Checklist** window, select the task description you want to move and click the **Up** or **Down** arrows.

2 Click **OK**.

### Adding a Task to the List

To add a task:

1 In the **Checklist** window, click **Add New**. The **Add Checklist Entry** window is displayed.

2 Type a description for the new task in the first field.

3 Type the instructions for carrying out the task in the second field.

4 Enter the command to run to complete this task, if applicable. Click **Browse** to select a command from the list.

5 Click **OK**.



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## Changing an Existing Task

To make a change to an existing task description or instructions:

1. In the **Checklist** window, select the task you want to change and click **Change**. The **Change Checklist Entry** window is displayed.
2. Make changes to the task description, instructions, or command fields.
3. Click **OK**.

## Removing a Task from the List

To remove a task from the list:

1. In the **Checklist** window, select the task you want to remove and click **Remove**. A message is displayed.
2. Click **Yes**. The **Remove Checklist Entry** window is displayed.
3. Click **OK**.

## Inserting a Task in the List

To insert a new task in the list:

1. In the **Checklist** window, select the task on the list that you want to display *after* the new task and click **Insert**. The **Insert Checklist Entry** window is displayed.
2. Type a description for the new task in the first field.
3. Type the instructions for carrying out the task in the second field.
4. Enter the command to run to complete this task, if applicable. Click **Browse** to select a command from the list.
5. Click **OK**.

**Note**

To attach commands to checklist options using the **Browse** button, contact a Support representative.



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## Skill Sharpener

### Exercise 1—Familiarize yourself with the Checklist feature.

To delete, add, and mark a task complete:

1. In the **Checklist** window, select **Print Coupon Books for new contracts entered** and click **Remove**. A message is displayed.
2. Click **Yes**. The **Remove Checklist Entry** window is displayed.
3. Click **OK**.
4. Click **Add New**. The **Add Checklist Entry** window is displayed.
5. In the first field, type **Print Coupon Books for new contracts entered** and click **OK**.
6. Select the task at the bottom of the list and click the up arrow to move the task up in the list.
7. To mark the task complete, click **Done**.
8. Click **Close**.



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Appendix A

# Migrating Your Software to OrthoTrac Software

You can migrate to OrthoTrac from any of the following software packages.

- OrthoTrac Classic software
- OrthoSoft software
- OPMS software
- Orthoware software

This appendix contains information to help you familiarize yourself with the main functions of the OrthoTrac software and their locations. Several tables list important functions in the software from which you are migrating and their corresponding locations in the OrthoTrac software.

## Main Menu Functions

After you open the OrthoTrac software and log in, the main menu is displayed.



Table 1 shows the main menu buttons that are available.

**Table 1 Main Menu Buttons**

| | |
|---|---|
| Open Patient Chart | Quick Add |
| Schedule Appointment | Patient Checkout |
| Financial Functions | Insurance Functions |
| Word Processing | Collections Activity |
| Contact Experts | Referrals |
| Patient Flow | Office Expert |
| Maintenance/ Set-up | Roladdress |



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**Table 1 Main Menu Buttons (Continued)**

| | |
|---|---|
|  **Checklist** |  **Timeclock** |
|  **Staff Login** |  **TeleVox T.LINK** |
|  **Staff Mail** |  **Personal ToDo Items** |

Selecting any of the options from the menu bar at the top of the screen displays a list of features. Some of these features are also available by using the function buttons.

The following options are available:

- **File**
  - **Prepare Backup–Prepares the database files for backing up.**
  - **Satellite Extraction**
  - **Printer Setup**–Enables you to select the default printer for your Windows operating system.
  - **Exit**–Closes the OrthoTrac software.
- **Functions**–Enables you to access the same features available when using the main menu buttons.
- **Reports**–Enables you to access all of the reports available in the software in the following categories: Patient, Responsible Party, Schedule, Financial, Miscellaneous, Charting, Patient Tracking, Patient Flow.
- **Options**
  - **Copy Database Files**–When prompted to exit the software after making a change, select **Copy Database Files** to update the information for that computer.
  - **Environment**–Enables you to configure a single workstation for multiple databases, set paths for folders, and select settings for several areas of the software.
- **Charts**–Enables you to select from a list of all patient charts currently open. **Close All**–Enables you to close all open charts.
- **Help**
  - **OrthoTrac Help**–Accesses the online help.
  - **What's New Video**–Enables you to view a video of new features to the software.
  - **MasterWorks Web Training**–Accesses the online training website, which offers courses for the software.
  - **Contact Us**–Accesses the Carestream Dental website, which provides ways for you to contact us.
  - **Check For Updates**–Enables you to obtain updates for the OrthoTrac software.
  - **Online Resource Center**–Accesses the Online Resource Center website, where you can search for specific topics involving the day-to-day use of your software.
  - **OrthoTrac on the Web**–Accesses the OrthoTrac software website.



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- **System Requirements on the Web**–Accesses the system requirements for the OrthoTrac software.
- **Install Adobe Acrobat Reader**–Installs the Adobe Acrobat Reader so you can read the online documentation.
- **About OrthoTrac**–Enables you to access your software version number and important system data.

## Patient Chart Function Buttons

You can access the patient chart from several areas within the software:

- After finding a patient using the **OrthoTrac Software Patient Lookup** window
- After adding a new patient
- From the patient flow module
- From the charting module




Table 2 shows the functions that are available in the patient chart.

**Table 2 Patient Chart Buttons**

| | |
|---|---|
| Patient Checkout | Patient Information |
| Schedule Appointment | Financial Functions |
| Claims | Word Processing |
| Snapshot | Charting |
| Patient Tracking | Database Fields |
| Orthodontic Imaging | OrthoTrac Software |
| Patient Lookup | |



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## Migrating from OrthoTrac Classic Software to OrthoTrac Software

Table 3 shows the codes for commonly used functions in OrthoTrac classic software and gives the corresponding paths for the equivalent functions in OrthoTrac software.

**Table 3 Migrating from OrthoTrac Classic Software to OrthoTrac Software**

| | Patient Information OrthoTrac Classic Software | Patient Information OrthoTrac Software |
|---|---|---|
| 01 | NAME-NUMBER INQUIRY | Open Patient Chart |
| 02 | ADD NEW PATIENT | Quick Add or Open Patient Chart > Add New |
| 03 | SHOW/CHANGE PATIENT | Open Patient Chart > Patient Information |
| 04 | PURGE PATIENT | Open Patient Chart > Remove |
| 05 | DATABASE OPERATIONS | Contact Experts |
| 06 | PATIENT FLOW | Patient Flow |
| 07 | TREATMENT CARD | Open Patient Chart > Charting |
| 08 | COMMUNICATIONS | Open Patient Chart > Word Processing |

| | Appointments OrthoTrac Classic Software | Appointments OrthoTrac Software |
|---|---|---|
| 11 | FIND PATIENT'S APPT | Open Patient Chart > Appts |
| 12 | SCH/CHGE/CANCEL APPT | Open Patient Chart > Schedule Appointment |
| 14 | DISPLAY SPECIFIC DAY | Schedule Appointment |
| 15 | NEXT AVAILABLE APPT | Schedule Appointment > Search |
| 17 | RECALLS | Open Patient Chart > Schedule Appointment > Sched Appt > Recall |

**Table 3 Migrating from OrthoTrac Classic Software to OrthoTrac Software (Continued)**

| | Accounting OrthoTrac Classic Software | Accounting OrthoTrac Software |
|---|---|---|
| 21 | PATIENT LEAVING | Patient Checkout |
| 22 | POST CHGS/CONTR/ COMNT | Open Patient Chart > Financial Functions |
| 23 | POST PAYMENTS | Open Patient Chart > Financial Functions |
| 24 | ADJUST BALANCES | Open Patient Chart > Financial Functions > Adjustments |
| 25 | DISPLAY LEDGER CARD | Open Patient Chart > Financial Functions > Ledger |

| | Insurance OrthoTrac Classic Software | Insurance OrthoTrac Software |
|---|---|---|
| 31 | PLAN MAINTENANCE | Maintenance/Set-up > Carrier Maintenance |
| 32 | ENTER CLAIM | Open Patient Chart > Claims |
| 33 | CLAIM MAINT/PRINT | Insurance Functions |
| 34 | ADJUST INSUR BALANCES | Open Patient Chart > Financial Functions > Adjustments |
| 35 | DISPLAY INSUR LEDGER | Open Patient Chart > Financial Functions > Ledger |

| | Dr. File and Referrals OrthoTrac Classic Software | Dr. File and Referrals OrthoTrac Software |
|---|---|---|
| 41 | DOCTOR MAINTENANCE | Maintenance/Set-up > Outside Doctor Information |
| 42 | REFERRAL MAINTENANCE | Referral Tracking or Maintenance/Set-up > Other Referrals |



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**Table 3 Migrating from OrthoTrac Classic Software to OrthoTrac Software (Continued)**

| | System Maintenance OrthoTrac Classic Software | System Maintenance OrthoTrac Software |
|---|---|---|
| 50 | PATIENT TRACKING | Reports > Patient Tracking or Open Patient Chart > Patient Tracking |
| 51 | PROCEDURE MAINTENANCE | Maintenance/Set-up > Procedure Code Maintenance |
| 52 | SCHEDULE MAINTENANCE | Maintenance/Set-up > Schedule Maintenance |
| 53 | MONTHLY ROLL | Reports > Financial > Roll > Roll Accounts |
| 54 | MESSAGE FILE | Maintenance/Set-up > Ticket Message Maintenance |
| 55 | PRINT REPORTS | See Table 4. |
| 56 | PRINT SCHEDULE | See Table 5. |
| 57 | WORD PROCESSING | Word Processing |
| 58 | ROLADDRESS | Roladdress |
| 59 | CALENDAR/CLOCK/ MAILTRAC | Timeclock |
| 60 | SYSTEM OPTIONS | Not Applicable |

Table 4 shows the codes for commonly used reports in OrthoTrac classic software and gives the corresponding paths for the equivalent reports in OrthoTrac software.

**Table 4 Migrating from OrthoTrac Classic Software to OrthoTrac Software—Reports**

| | Patient Reports OrthoTrac Classic Software | Patient Reports OrthoTrac Software |
|---|---|---|
| 01 | NAME/ADDRESS | Reports > Patient > Patient Listing |
| 02 | ALPHA NAME/ADDRESS | Reports > Patient > Patient Listing |
| 03 | ALPHA CROSS-REFERENCE | Reports > Patient > Patient Listing |
| 04 | RESP PARTY CROSS REFERENCE | Reports > Miscellaneous > Patient/Responsible Party Xref |
| 05 | MAILING LABELS | Reports > Miscellaneous > Mailing Labels |
| 06 | ZIP CODE ORDER | Reports > Patient > Patients By... > ZipCode |
| 07 | BIRTHDAYS THIS MONTH | Reports > Patient > Patient Birthdays |
| 08 | PATIENTS WITH COMMENTS | Reports > Patient > Patients With... > Comments |
| 09 | STATISTICAL PROFILE | Reports > Patient > Patient Statistical Profile |
| 10 | NEW PATIENT LABELS | Reports > Patient > Chart Labels |
| 19 | PATIENT INFORMATION FORM | Reports > Patient > Patient Information Form |
| 27 | LASER RETURN ADDRESS LABELS | Word > Tools > Envelopes and Labels |
| 51 | MISSING PATIENT INFO | Reports > Patient > Missing Patient Data |



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Table 4 Migrating from OrthoTrac Classic Software to OrthoTrac Software—Reports (Continued)

| | Utilities Reports OrthoTrac Classic Software | Utilities Reports OrthoTrac Software |
|---|---|---|
| 30 | SET COMPRESSED PRINT | Not Applicable |
| 31 | SET STANDARD PRINT | Not Applicable |
| 41 | PURGE FILE MAINTENANCE | Reports > Patient > Deleted Patients |
| 42 | FREE STANDING RECEIPT | Open Patient Chart > Financial Functions > Reports > Receipt > Payment Receipt |
| 50 | NEW PATIENT TRACKING | Reports > Patient Tracking |

| | Miscellaneous Reports OrthoTrac Classic Software | Miscellaneous Reports OrthoTrac Software |
|---|---|---|
| 11 | SELECTED BILLING TYPES | Reports > Financial > Selected Billing Types |
| 12 | STATEMENTS OR INTEREST CODE | Reports > Financial > Statement Code/Late Charge |
| 13 | PATIENTS BY STATUS | Reports > Patient > Patients By... > Status |
| 14 | ALL PATIENTS OF ONE TYPE CODE | Reports > Patient > Patients By... > Type |
| 15 | PATIENTS IN SATELLITES | Reports > Patient > Patients By... > Location |
| 16 | DELETION CANDIDATES | Reports > Patient > Patient Completion Report |
| 17 | COMPLETION DATE | Reports > Patient > Patient Completion Report |
| 18 | REVIEW CODE REPORT | Contact Experts |

Table 4 Migrating from OrthoTrac Classic Software to OrthoTrac Software—Reports (Continued)

| | Financial Reports OrthoTrac Classic Software | Financial Reports OrthoTrac Software |
|---|---|---|
| 21 | DAYSHEET/DEPOSIT SLIP | Reports > Financial > Daysheet > View Daysheet or Process Daysheet |
| 22 | CONTRACT PAYMENT CARDS | Reports > Financial > Coupon Books |
| 23 | AGED RECEIVABLES | Reports > Financial > Aged Receivables by... |
| 24 | STATEMENTS | Reports > Financial > Statements |
| 26 | SUSPICIOUS BALANCES | Reports > Financial > Suspicious Balances |
| 43 | LEDGER REPORT | Reports > Financial > Ledger Scan |
| 45 | DEPOSIT SUMMARY | Reports > Financial > Daysheet > MTD Daysheet Report |
| 62 | ARCHIVED DAYSHEET | Not Applicable |



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Table 5 shows the codes for commonly used schedule reports in OrthoTrac classic software and gives the corresponding paths for the equivalent reports in OrthoTrac software.

**Table 5 Migrating from OrthoTrac Classic Software to OrthoTrac Software—Scheduling Reports**

| | Scheduling Reports OrthoTrac Classic Software | Scheduling Reports OrthoTrac Software |
|---|---|---|
| 01 | NAMES FOR A DAY | Reports > Schedule > Daily Schedule > Schedule Format |
| 02 | NUMBERS FOR A DAY | Reports > Schedule > Daily Schedule > List Format |
| 03 | RANGE OF DAYS | Reports > Schedule > Daily Schedule > List Format or Schedule Format |
| 04 | NOSHOW REPORT | Reports > Schedule > NoShow Report |
| 05 | COLLECTIONS REPORT | Reports > Schedule > Daily Collections |
| 06 | NAMES AND PHONES | Reports > Schedule > Daily Schedule > List Format |
| 07 | PROCEDURE REPORT | Reports > Schedule > Future Procedures |
| 08 | BUCK SHEETS FOR A DAY | Not Applicable |
| 09 | LABELS FOR A DAY | Contact Experts |
| 10 | SCHEDULING EXCEPTIONS | Contact Experts |
| 15 | SEARCH BLOCK REPORT | Reports > Schedule > Available Appointments |
| 16 | APPOINTMENT STATISTICS | Not Applicable |
| 81 | APPOINTMENT CARD | Open Patient Chart > Reports > Ticket |
| 82 | SCHOOL/WORK EXCUSE | Open Patient Chart > Reports > Ticket |
| 83 | FREESTANDING BIRTHDAY | Not Applicable |
| 84 | SCHEDULE AT A GLANCE | Schedule Appointment > Statistics |
| 85 | PROGRESS REVIEW SYSTEM | Reports > Patient > Patient Progress Review |
| 86 | COMPLETION DATE EXCEPTIONS | Not Applicable |



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## Migrating from OrthoSoft to OrthoTrac Software

Table 6 shows the commonly used functions in OrthoSoft software and gives the corresponding paths for the equivalent functions in OrthoTrac software.

**Table 6 Migrating from OrthoSoft Software to OrthoTrac Software**

| | Appointment Desk OrthoSoft Software | Appointments OrthoTrac Software |
|---|---|---|
| | Scheduling, Rescheduling, And Canceling Appointments | Open Patient Chart > Schedule Appointment |
| | Viewing Days In The Appointment Desk | Schedule Appointment |
| 5 & 9 | Placing Patients In Recall | Open Patient Chart > Schedule Appointment > Sched Appt > Recall |
| | Finding A Patient's Appointment | Open Patient Chart > Appts |
| F6 | Adding A New Patient | Open Patient Chart > Add New<br>or<br>Quick Add |

| | Correspondence Desk OrthoSoft Software | Correspondence OrthoTrac Software |
|---|---|---|
| | Correspondence Editor | Word Processing > Letter Setup |
| | Print Letters | Word Processing > Post and Print Letters |

**Table 6 Migrating from OrthoSoft Software to OrthoTrac Software (Continued)**

| | Diagnosis Desk OrthoSoft Software | Diagnosis OrthoTrac Software |
|---|---|---|
| | Diagnosis | Open Patient Chart > Word Processing > Execute Questionnaire |
| | Diagnosis/Treatment Plan | Open Patient Chart > Charting > Edit Charting |

| | Finance Desk OrthoSoft Software | Financial OrthoTrac Software |
|---|---|---|
| F3 | Setting Up A Contract | Open Patient Chart > Financial Functions > Contracts and Payment Plans |
| | Posting Payments | Open Patient Chart > Financial Functions |
| | Making Contract Adjustments | Open Patient Chart > Financial Functions > Adjustments |
| F8 | Viewing The Patient's Ledger | Open Patient Chart > Financial Functions > Ledger |

| | Insurance Desk OrthoSoft Software | Insurance OrthoTrac Software |
|---|---|---|
| | Insurance Desk Claim Forms | Open Patient Chart > Claims |
| | Continuation Of Treatment Forms | Insurance Functions > Continuation of Treatment |

| | System Configuration OrthoSoft Software | Maintenance/Set-up OrthoTrac Software |
|---|---|---|
| | System Config./Hours In Office | Maintenance/Set-up > Schedule Maintenance |
| | System Config./ Procedures Performed | Maintenance/Set-up > Procedure Code Maintenance |



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**Table 6 Migrating from OrthoSoft Software to OrthoTrac Software (Continued)**

| | Master Chart OrthoSoft Software | Patient Chart OrthoTrac Software |
|---|---|---|
| | Master Chart | Open Patient Chart > Patient Information |

| | Time Clock OrthoSoft Software | Time Clock OrthoTrac Software |
|---|---|---|
| | Time Clock | Timeclock |

Table 7 shows the commonly used reports in OrthoSoft software and gives the corresponding paths for the equivalent reports in OrthoTrac software.

**Table 7 Migrating from OrthoSoft Software to OrthoTrac Software—Reports**

| | Appointment Reports OrthoSoft Software | Appointment Reports OrthoTrac Software |
|---|---|---|
| | Appointments On Screen | Reports > Schedule > Daily Schedule > Schedule Format<br>or<br>Click **Print** from inside a specific day on the calendar. |
| | Daily Schedule | Reports > Schedule > Daily Schedule > List Format |
| | Future Appointment Totals | Reports > Schedule > Future Procedures |
| | List Of Patients W/o Appt Status | Reports > Patient > Patients Without... > Valid Appointments Or Recalls |
| | No Show List | Reports > Schedule > NoShow Report |
| | Past Appointment Totals | Reports > Miscellaneous > Procedures > Totals |

**Table 7 Migrating from OrthoSoft Software to OrthoTrac Software—Reports (Continued)**

| | | |
|---|---|---|
| | Recall List | Reports > Schedule > Recall List |
| | View Aging For Daily Schedule | Reports > Schedule > Daily Collections |

| | Financial Reports OrthoSoft Software | Financial Reports OrthoTrac Software |
|---|---|---|
| | Aging Report | Reports > Financial > Aged Receivables by... |
| | Financial Transactions | Reports > Financial > Ledger Scan |
| | Historical Late Charges/Interest | Reports > Financial > Statement Code/Late Charge |
| | Query Open Ended And Per Visit Fees | Reports > Financial > Contract Summary |
| | Statements | Reports > Financial > Statements |
| | Truth In Lending | Word Processing > Post and Print Letters |
| | Payment Book | Reports > Financial > Coupon Books |
| | Monthly Production Report | Reports > Financial > Daysheet > MTD Daysheet Report |

| | Quick Search Reports OrthoSoft Software | Miscellaneous Reports OrthoTrac Software |
|---|---|---|
| | Insurance Reports | Reports > Miscellaneous > Carriers and Associated Patients |
| | Dentist Reports | Reports > Miscellaneous > Doctor Listing |
| | Referral Sources Reports | Referrals |



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Table 7 Migrating from OrthoSoft Software to OrthoTrac Software—Reports (Continued)

| | Time Clock and Staff Reports OrthoSoft Software | Time Clock and Staff Reports OrthoTrac Software |
|---|---|---|
| | List Of Staff Members | Reports > Miscellaneous > Staff Listing |
| | Individual Time Clock Reports | Timeclock > Reports |

| | Labels OrthoSoft Software | Labels OrthoTrac Software |
|---|---|---|
| | Labels | Reports > Miscellaneous > Mailing Labels |

## Migrating from OPMS Software to OrthoTrac Software

Table 8 shows the commonly used functions in OPMS software and gives the corresponding paths for the equivalent functions in OrthoTrac software.

Table 8 Migrating from OPMS Software to OrthoTrac Software

| Patient Information OPMS Software | Patient Information OrthoTrac Software |
|---|---|
| Add A Patient | Open Patient Chart > Add New<br>or<br>Quick Add |
| Change Patient Information | Open Patient Chart > Patient Information |
| Datamaster | Contact Experts |
| Practice-Wide > Patients > Delete A Patient | Open Patient Chart > Remove |
| Charting Module | Open Patient Chart > Charting |
| Patient Flow | Patient Flow |

Table 8 Migrating from OPMS Software to OrthoTrac Software (Continued)

| | |
|---|---|
| Practice-Wide > Patients > Maintain Patient Flags | Open Patient Chart > Patient Information > Comment<br>Open Patient Chart > Patient Information > Medical Alert<br>Open Patient Chart > Treatment Card > Medical Alert |

| Appointments OPMS Software | Appointments OrthoTrac Software |
|---|---|
| Schedule Appointments > View Appointments For A Specific Patient | Open Patient Chart > Appts |
| Schedule Appointments | Open Patient Chart > Schedule Appointment |
| Change Patient Information > Appointments > Make Recall | Open Patient Chart > Schedule Appointment > Sched Appt > Recall |
| Schedule Appointments > Search For A Reservation | Schedule Appointment > Search |
| Schedule Appointments > View Week-At-A-Glance | Schedule Appointment > Week |

| Correspondence OPMS Software | Correspondence OrthoTrac Software |
|---|---|
| Word Processing | Word Processing > Letter Setup |
| Word Processing | Word Processing > Post and Print Letters |

| Questionnaires and Diagnosis OPMS Software | Questionnaires and Diagnosis OrthoTrac Software |
|---|---|
| Advanced Correspondence | Open Patient Chart > Word Processing > Execute Questionnaire |
| Change Patient Information > Diagnosis/Treatment Tab | Open Patient Chart > Charting > Edit Charting |



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Table 8 Migrating from OPMS Software to OrthoTrac Software (Continued)

| Referral Information OPMS Software | Referral Information OrthoTrac Software |
|---|---|
| Practice-Wide > Referrals | Maintenance/Set-up > Outside Doctor Information |
| Practice-Wide > Referral Types | Referral Tracking<br>or<br>Maintenance/Set-up > Other Referrals |

| Financial OPMS Software | Financial OrthoTrac Software |
|---|---|
| Change Patient Information > Contract Tab | Open Patient Chart > Financial Functions > Contracts and Payment Plans |
| Post Payments | Open Patient Chart > Financial Functions |
| Post Charges | Open Patient Chart > Financial Functions |
| Patient Ledgers > Make Adjustment | Open Patient Chart > Financial Functions > Adjustments |
| Change Patient Information > Contract Tab | Open Patient Chart > Financial Functions > Adjustments |
| Patient Ledgers | Open Patient Chart > Financial Functions > Ledger |
| Scheduled Payments | Open Patient Chart > Financial Functions > Auto Payments |
| Daily > End The Financial Day | Reports > Financial > Daysheet > View Daysheet or Process Daysheet |
| Monthly > End-of-month | Reports > Financial > Roll > Roll Accounts |
| Daily > Collections Module | Collections Activity |

Table 8 Migrating from OPMS Software to OrthoTrac Software (Continued)

| Insurance OPMS Software | Insurance OrthoTrac Software |
|---|---|
| Printing > Insurance Forms | Open Patient Chart > Claims |
| Printing > Insurance Forms | Insurance Functions > Continuation of Treatment |
| Post Insurance Payments | Insurance Functions |

| Maintenance OPMS Software | Maintenance OrthoTrac Software |
|---|---|
| Practice-Wide > Locations | Maintenance/Set-up > Schedule Maintenance |
| Practice-Wide > Procedures | Maintenance/Set-up > Procedure Code Maintenance |
| Practice-Wide > Orthodontists | Maintenance/Set-up > Staff Maintenance<br>Maintenance/Set-up > System Maintenance > Locations |
| Practice-Wide Staff > Members | Maintenance/Set-up > Staff Maintenance |
| Practice-Wide Late Charge Setup | Maintenance/Set-up > System Maintenance > System Options |
| Practice-Wide > Carriers | Maintenance/Set-up > Carrier Maintenance |
| Practice-Wide > Employers | Maintenance/Set-up > Employer Maintenance |
| Practice-Wide > Practice Information | Maintenance/Set-up > System Maintenance > Locations |
| Practice-Wide > Activity Codes | Maintenance/Set-up > System Maintenance > Patient Status |
| Practice-Wide > Procedure Classes | Maintenance/Set-up > Schedule Maintenance |
| Practice-Wide > Diagnosis And Treatment Codes | Maintenance/Set-up > System Maintenance > Patient Types |
| Practice-Wide > Patient Milestones | Maintenance/Set-up > System Maintenance > Patient Status |
| Miscellaneous > System Options | Maintenance/Set-up > System Maintenance |



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Table 9 shows the commonly used reports in OPMS software and gives the corresponding paths for the equivalent reports in OrthoTrac software.

**Table 9 Migrating from OPMS Software to OrthoTrac Software—Reports**

| Appointment Reports OPMS Software | Appointment Reports OrthoTrac Software |
|---|---|
| Daily > Print Appointment Schedules | Reports > Schedule > Daily Schedule > Schedule Format<br>or<br>Click **Print** from inside a specific day on the calendar. |
| Planned Procedures By Date Or By Procedure | Reports > Schedule > Future Procedures |
| Unresolved Appointments | Reports > Patient > Patients Without... > Valid Appointments Or Recalls |
| Dm-20 No-shows By Date | Reports > Schedule > NoShow Report |
| Selected Procedure Frequency | Reports > Miscellaneous > Procedures > Totals |
| Recall Listing | Reports > Schedule > Recall List |

| Financial Reports OPMS Software | Financial Reports OrthoTrac Software |
|---|---|
| Demand Aged Receivables Report | Reports > Financial > Aged Receivables by... |
| Demand Transaction Summary | Reports > Financial > Ledger Scan |
| Late Charges | Reports > Financial > Statement Code/Late Charge |
| Printing > Reports > Patients > Dm-08<br>Printing > Reports > Patients > Dm-21 | Reports > Financial > Contract Summary |
| Monthly > End-of-month Statements | Reports > Financial > Statements |
| Monthly > Demand Practice Statistics Report | Reports > Financial > Daysheet > Process Daysheet |
| Monthly > Demand Daily Totals Report | Reports > Financial > Daysheet > Process Daysheet |
| Monthly > Demand Production Report | Reports > Financial > Roll > Roll Accounts |
| TI.doc (Truth In Lending) | Word Processing > Post and Print Letters |
| Printing > Coupons | Reports > Financial > Coupon Books |
| Monthly > End-of-month > Production Report | Reports > Financial > Daysheet > MTD Daysheet Report |
| Monthly > Balancing Worksheet | Reports > Financial > Balancing Worksheet |
| Superbill | Reports > Financial > Statements > Individual Statement |



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Table 9 Migrating from OPMS Software to OrthoTrac Software—Reports (Continued)

| Insurance Reports OPMS Software | Insurance Reports OrthoTrac Software |
|---|---|
| Printing > Reports > Insurance Tab | Reports > Miscellaneous > Carriers and Associated Patients |

| Referral Reports OPMS Software | Referral Reports OrthoTrac Software |
|---|---|
| Printing > Reports > Referrals Tab | Reports > Miscellaneous > Doctor Listing |
| Printing > Reports > Referrals Tab | Referrals |

| Labels OPMS Software | Labels OrthoTrac Software |
|---|---|
| Printing > Labels | Reports > Miscellaneous > Mailing Labels |

| Task Organizer OPMS Software | Task Organizer OrthoTrac Software |
|---|---|
| Practice-Wide > Reminders | Personal ToDo Items |

## Migrating from Orthoware Software to OrthoTrac Software

Table 10 shows the commonly used functions in Orthoware software and gives the corresponding paths for the equivalent functions in OrthoTrac software.

Table 10 Migrating from Orthoware Software to OrthoTrac Software

| Patient Information Orthoware Software | Patient Information OrthoTrac Software |
|---|---|
| Add Patient, Lightning Quick, Add New, or Quick Add | Open Patient Chart > Add New<br>or<br>Quick Add |
| Change Patient Information | Open Patient Chart > Patient Information |
| Delete Patient | Open Patient Chart > Remove |
| Charting | Open Patient Chart > Comment only or Edit Charting |
| On deck | Patient Flow |
| Notes, Financials, and Alerts | Open Patient Chart > Patient Information > Comment<br>Open Patient Chart > Patient Information > Medical Alert<br>Open Patient Chart > Treatment Card > Medical Alert<br>Open Patient Chart > Financial Functions > Promises and Collections |

| Appointments Orthoware Software | Appointments OrthoTrac Software |
|---|---|
| Schedule Appointments > View Appointments for a Specific Patient > Open Patient Chart | Open Patient Chart > Schedule Appointment |
| Schedule Recall | Open Patient Chart > Schedule Appointment > Recall |
| Schedule Appointments > Appointment Search | Open Patient Chart > Schedule Appointment > Search |



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Table 10 Migrating from Orthoware Software to OrthoTrac Software (Continued)

| | |
|---|---|
| Schedule Appointments > View Week-At-A-Glance | Open Patient Chart > Schedule Appointment > Week |

| Correspondence Orthoware Software | Correspondence OrthoTrac Software |
|---|---|
| Create or Edit Letters > Letter Setup | Word Processing > Letter Setup |
| Request a Letter | Word Processing > Post and Print Letters |

| Quictation and Diagnosis Orthoware Software | Questionnaires and Diagnosis OrthoTrac Software |
|---|---|
| Quictation | Open Patient Chart > Word Processing > Execute Questionnaire |
| Diagnosis | Open Patient Chart > Charting > Edit Charting |

| Referral Information Orthoware Software | Referral Information OrthoTrac Software |
|---|---|
| Add Professionals | Maintenance/Set-up > Outside Doctor Information |
| Track Referrals > Printing > Reports > Tracking Referrals | Referrals |

| Financial Orthoware Software | Financial OrthoTrac Software |
|---|---|
| Piggy Bank > Payment Entry | Open Patient Chart > Financial Functions > Charges and Payment > Post Payments |
| Piggy Bank > Treatment Entry | Open Patient Chart > Financial Functions > Charges and Payment > Post Charge |
| Set Up Budget > Piggy Bank > Set Up Budget | Open Patient Chart > Financial Functions > Contract and Payment Plan |

Table 10 Migrating from Orthoware Software to OrthoTrac Software (Continued)

| | |
|---|---|
| Coupons | Open Patient Chart > Financial Functions >Contract and Payment Plans > Reports > Contract and Payment Plan > Coupons |
| Q-Pay | Financial Functions |
| Patient Ledgers | Open Patient Chart > Financial Functions > Ledger |
| Auto Payment | Open Patient Chart > Financial Functions > Auto Payments |
| Daysheet | Reports > Financial > Daysheet > View Daysheet or Process Daysheet |
| Piggy Bank > Adjustments | Open Patient Chart > Financial Functions > Adjustments |
| Walk-Away Statements | Open Patient Chart > Financial Functions > Reports > Statement > Statement for Today |
| Assess and Age | Reports > Financial > Roll > Roll Accounts |
| Apply Late Charges | Reports > Financial > Roll > Include Late Charge |
| Monthly Statements | Reports > Financial > Generate Statements > Print/View Statements |

| Insurance Orthoware Software | Insurance OrthoTrac Software |
|---|---|
| Insurance Forms | Open Patient Chart > Claims > Create Claim |
| Print Claims | Insurance Functions > Claim Processing > Print all Un-printed Claims |
| Print COT Forms | Insurance Functions > Continuation of Treatment > Confirm All Printed Claims > Generate Claims > Print All Unprinted Claims |
| Piggy Bank > Post Insurance Payments | Claims > Post Bulk Insurance Payment |



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**Table 10 Migrating from Orthoware Software to OrthoTrac Software (Continued)**

| Maintenance Orthoware Software | Maintenance OrthoTrac Software |
|---|---|
| Default Setup | Maintenance/Set-up |
| Program Essentials > Doctors and Staff | Maintenance/Set-up > Staff Maintenance |
| Program Essentials > Offices | Maintenance/Set-up > System Maintenance > Locations |
| Program Essentials > Access Control | Maintenance/Set-up > Security |
| Program Essentials > Lookup | Maintenance/Set-up > System Maintenance |
| Program Essentials > Custom Fields | Maintenance/Set-up > Additional Database |
| Program Essentials > Professional | Maintenance/Set-up > Outside Doctors |
| Program Essentials > Treatment Groups | Maintenance/Set-up > System Maintenance > Patient Status |
| Program Essentials > Treatment Procedures | Maintenance/Set-up > Procedure Codes |
| Program Essentials > Quictation | Word Processing > Communication Setup |
| Contacts > Insurance Company | Maintenance/Set-up > Carrier Maintenance > Add Carrier or Edit Carrier |
| Default Setup > Financial Tab | Maintenance/Set-up > System Options |
| Default Setup > Schedule Tab | Maintenance/Set-up > Schedule |
| Add on > SAM Setup > Perfect Day | Maintenance/Set-up > Schedule Maintenance > Add or Change Standards |
| Add on > SAM > Create > Quick Calendar Setup | Maintenance/Set-up >Schedule Maintenance > Add Days |
| Add on > SAM > Add/Remove Days | Maintenance/Set-up > Schedule Maintenance > Remove Days |

Table 11 shows the commonly used reports in Orthoware software and gives the corresponding paths for the equivalent reports in OrthoTrac software.

**Table 11 Migrating from Orthoware Software to OrthoTrac Software—Reports**

| Appointment Reports Orthoware Software | Appointment Reports OrthoTrac Software |
|---|---|
| Printing > Appointment > Appointment Page | Reports > Schedule > Daily Schedule > Schedule Format or Schedule Appointment > Select Day > Print |
| Printing > Appointment > Appointment List | Reports > Schedule Daily Schedule > List Format |
| Printing > Appointment > Appointment List w/Financials | Reports > Schedule > Daily Collection |
| Printing > Appointment > Recall List | Reports > Schedule > Recall List/Recall Labels/Recall Cards |
| Printing > Appointment > Needs Appointment List | Reports > Schedule > Recall List > Open Recalls and Alpha |
| Printing > Appointment > Perfect Days | Maintenance/Set-up > Schedule Maintenance > Select Standard > Print |
| Printing > Appointment > Time Management Report | Reports > Patient Flow |

| Financial Reports Orthoware Software | Financial Reports OrthoTrac Software |
|---|---|
| Printing > Financial > Daysheet | Reports > Financial > Quick View or Process Daysheet |
| Printing > Financial >Aging Report | Reports > Financial > Accounts Receivable > Patient > Responsible > Insurance |
| Printing > Financial > Auto Payment Report | Reports > Financial > Auto Payment List |
| Printing > Financial > Monthly Journal | Reports > Financial > Daysheet > MTD Reports |
| Printing > Financial >Monthly Production | Reports > Financial > Daysheet > Monitor Page |



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Table 11 Migrating from Orthoware Software to OrthoTrac Software—Reports (Continued)

| | |
|---|---|
| Printing > Financial > Insurance Not Paid | Reports > Accounts Receivable > Daysheet > Insurance Only |
| Printing > Credit Card Reconciliation | Reports > Financial > Ledger Scan > Credit Card |
| Patient Chart > Walkaway Statement | Reports > Financial > Statements > Individual Statement or Open Patient Chart > Financial Functions > Reports > Statement > Statement for Today |
| Printing > Financial > Financial History | Reports > Financial > Daysheet > Financial Analysis |
| Payment Coupons | Reports > Financial > Coupon Books or Open Patient Chart > Financial Functions > Contracts and Payment Plans > Reports > Contracts and Payment Plans > Coupons |

Table 11 Migrating from Orthoware Software to OrthoTrac Software—Reports (Continued)

| Insurance Reports Orthoware Software | Insurance Reports OrthoTrac Software |
|---|---|
| Printing > Financial > COT List | Insurance Functions > Claim Reports > COT List |
| Printing > Financial > Insurance Not Paid | Reports > Financial > Accounts Receivable > By Insurance |

| Referral Reports Orthoware Software | Referral Reports OrthoTrac Software |
|---|---|
| Printing > Referral List | Referrals > Reports |
| Printing > Referral Analysis | Referrals > Date Range or Miscellaneous > Marketing Analysis |

| Labels and Cards Orthoware Software | Labels OrthoTrac Software |
|---|---|
| Printing > Labels > Patient Labels | Reports > Miscellaneous > Mailing Labels |
| Printing > Labels and Cards > Recall | Reports > Schedule > Recall Labels/Recall Cards |

| Task Organizer Orthoware Software | Task Organizer OrthoTrac Software |
|---|---|
| Message Board | Personal ToDo Items or Checklist |



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