

SETTING UP ORTHO

The Ortho/Payment Plan option is designed for practices that do ortho procedures on a regular basis.

Setup Ortho Charge Codes

Initial Ortho Fee

- Go to **Maintenance**, click the **Office Tab**, and double click the **Office Charge Codes**
- Click **Create Record**
- In **Code** type *IF*
- In **Desc.** and **Print Desc.** type *Initial Fee*
- In **Charge To:** select *Patient*
- In **Amount:** leave as 0.00
- Click **Save Record**

The screenshot shows the 'Office Charge Codes' window. The 'Code' field is 'IF', 'Desc.' is 'Initial Ortho Fee', and 'Print Desc.' is 'Initial Ortho Fee'. 'Charge To' is set to 'Patient' and 'Amount' is '0.00'. The 'Cat' dropdown is set to 'C'. A list of codes is shown below, with 'IF' selected.

Code	Description
BFI	Balance Fwd Insurance
BFP	Balance Fwd Patient
CAR	Collection Agency Retrv.
IF	Initial Ortho Fee
INT	Interest Charged
MA	Missed Appointment

Monthly Ortho Fee

- Click **Create Record**
- In **Code** type *MF*
- In **Desc.** and **Print Desc.** type *Ortho Monthly Fee*
- In **Charge To:** select *Patient*
- In **Amount:** leave as 0.00
- Click **Save Record**

The screenshot shows the 'Office Charge Codes' window. The 'Code' field is 'MF', 'Desc.' is 'Ortho Monthly Fee', and 'Print Desc.' is 'Ortho Monthly Fee'. 'Charge To' is set to 'Patient' and 'Amount' is '0.00'. The 'Cat' dropdown is set to 'C'. A list of codes is shown below, with 'MF' selected.

Code	Description
INT	Interest Charged
MA	Missed Appointment
MF	Ortho Monthly Fee
NSC	*NSF Charge
OI	*Open Balance- Insurance
OP	*Open Balance- Patient


Make sure the Patient's Insurance Coverage template for the policy has the Ortho codes 93331-93334 in it. You may need to add them. See this by going to **Patient File**, and clicking on the **Insurance** tab.

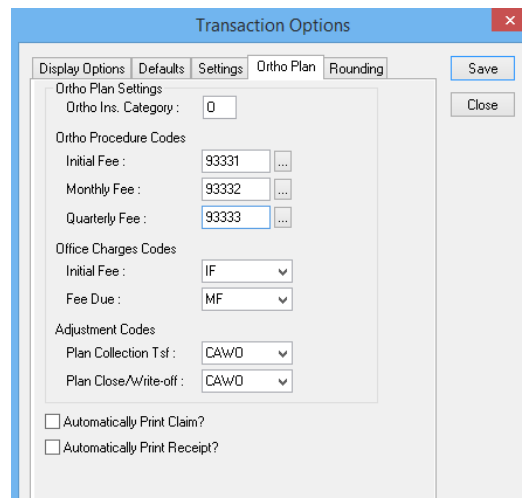
The screenshot shows the 'Insurance Coverage' window. The 'Policy Coverage' is '100/50/50'. The 'Coverage...' dropdown is set to 'Coverage...'. The table below shows the Ortho codes 93331-93334.

Item #	Cat	Description	From	To	%
018	B	Basic-Ext/Surg.	71100	77899	80
035	O	Ortho	93331	93334	50
033	M	Lab	99111	99333	50

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Set Up Ortho Plan Options

- Go to **Transactions**
- Click **Options/Settings** icon 
- Click on **Ortho Plan** tab
- Enter **Ortho Ins. Category** (the letter "O")
- Enter the **correct Ortho Procedure Codes** for Initial, Monthly and Quarterly fees
- Select the **Office Charge Codes** added in **Maintenance/Office, Office Charge Codes** (IF for Initial Fee, MF for Monthly Fee)
- Select **Adjustment Codes** you will use to close or Write Off the plan if needed (for Collection Type Plans-usually CAWO for both fields)
- Select your printing options (**Automatically Print Claim?** **Automatically Print Receipt?**)
- Click **Save** to save your entries

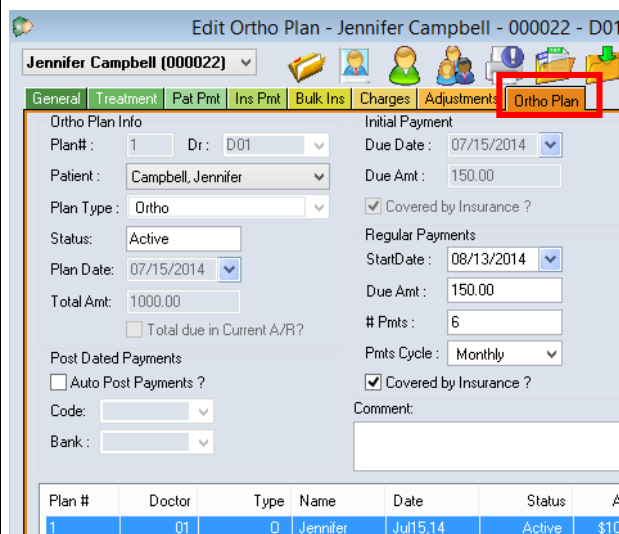


Once the defaults are set up you can create the **Ortho Plan**.

- Open **Transactions** with the ortho patient chosen:
- Click on the **Ortho Plan** tab
- Click on the **New** button
- **Plan #**: generated by Power Practice
- **Dr.**: billing Dr for Ortho plan
- **Plan Type**: usually O for Ortho
- **Status**: Status of the Ortho Plan
- **Plan Date**: date the plan was entered
- **Total Amt**: total amount of the Ortho plan in full

Post Dated Payments. (optional)

- When chosen, **Auto Post Payments** will post the patient payment to the ledger during **Ortho Plan Fees** processing. This payment will need to be allocated to the ortho treatment.



Plan #	Doctor	Type	Name	Date	Status	Amount
1	01	O	Jennifer	Jul15,14	Active	\$10

SETTING UP ORTHO

Initial Payment

- **Due Date:** Usually today's date or a date forward. **Do not backdate this.**
- **Due Amount:** the initial amount charged to the patient
- Is initial fee **Covered By Insurance?**

Regular Payments

- **StartDate:** the date of the first monthly payment after the initial payment
- **Due Amt:** the monthly payment. (Tabbing out of this field will calculate the #Pmt.)
- **# Pmt:** will be calculated from the Due Amount **Payment Cycle**(usually monthly)
- Is the ortho **Covered By Insurance?**
- The bottom box will list all Ortho plans for the family and the plan statuses

The Buttons

- **New:** Create a new Ortho plan
- **Save:** Save the plan and start the ortho
- **Delete:** Delete a plan entered in error
- **Contract:** Create and print out a contract for the patient. This is not saved in Power Practice.
- **Reconcile:** will show the history of Ortho treatments posted and the payments made
- **Attach Tx:** Not used at this time
- **Close Plan:** will close the plan and the balance will be written off.
- **Predet Form:** will print off an Ortho Predetermination

- Once a plan has been entered and saved, you will need to run the **Month End Tasks-Ortho Plan Fees**
- You will need to run the **Ortho Plan Fees** every Ortho cycle for the program to generate the Ortho Fees and Auto Post Payments options to the patient ledgers.



MORE EXPLANATION OF SOME FIELDS

SETTING UP ORTHO

Regular Payments Start Date Enter the date when the first monthly payment will be due. It is recommended that these be set to the 1st or the 15th of the month for every ortho plan so they can all be generated at the same time with the Month End Tasks. This cycle date can be decided by your office.

Post Dated Payments may be accepted and posted. The system will automatically post the payment to the patient ledger for the amount due when generating the Ortho Plan Monthly process. *You will not be able to change the date on the payment once posted from here. You will need to reverse and re-enter the payments to correct the dates.* You may choose to post the payments every month manually instead of using this option. Auto-post payments will be attached to the ortho claim.

Month End Tasks Ortho Plan Fees in the Month End Tasks needs to be run after an Ortho Plan has been entered to post the Initial Fee and every month following on the due date of the Regular Payments. It is recommended that this due date be the 1st, 15th, or 30th or (as an example) only Mondays. This way, you can run the Ortho Plan Fees on a regular schedule. The ortho treatments and payments WILL NOT post to the accounts unless the Ortho Plan Fees is run. This function will also create the claims and or receipts for each ortho plan.

Creating a Report for All Claims Created If you choose not to create claim forms or receipts for all your ortho plans when you run the Ortho Plan Fees, you can run a custom report for all fees generated for a specific time frame by creating a custom report.

Creating the report:

- Select the **System Tab**
- Select **Custom Reports**
- Select **Create A New Record**
- #1 Name the Report (Ortho)
- #2 Report Type- Select Claims/Treatments
- #5 Criteria- Claim/Treatment Code
- #6 Condition- Is One of (a or b)
- #7 Value- one on each line (93331, 93332, 93333 - the Ortho Codes)
- Click **Save**
- Click **New**
- #5 Criteria- Claim/Treatment Claim Date
- #6 Condition- Is Equal To (or select between if picking a range)
- #7 Value- Enter the date
- Click **Save**
- Click **Run**
- To print click on the **printer icon**.
- Close with the **X** at the top right hand corner.

If you require further assistance, please call Support at 604-468-6820 or 1888-808-6223 option 2.