Practice-Web Dental Quick Start Basics

Office Setup

- Click on Setup
- In the Setup menu, click on Practice
- Enter Practice information

Add Providers

- Click on LIST
- In the List Menu, click on Providers
- Click on ADD
- Enter Provider information
- Select appointment color, Specialty and Fee Schedule

Appointment Schedule Setup

- Click on "Setup".
- A drop down menu will open.
- Click on "Practice Default".
- The default Schedule will appear.
- If the office hours are other than what the Default times are, then the times will need to be edited to reflect the correct office hours.
- Starting on Monday, double left click on the Starting Time slot.
- The "Edit Block" dialog will appear.
- In the "Start Time" field, type in the time that your practice opens.
- In the "Stop Time" field, type in the time that the lunch break is to start.
- Click the "OK" button.
- While still on Monday, double left click on the ending Time slot.
- The "Edit Block" dialog will appear again.
- In the "Start Time" field, type in the time that your lunch break ends.
- In the "Stop Time" field, type in the time that your practice closes.
- Click on the "OK" button.

Repeat these instructions for each day of the week your practice is open.

Enter Fee Schedule Names

- Click on “Lists”
- In the Lists menu click on “Procedure Codes”.
- From within the "Procedure Codes" list, Under Fee Schedule, click on "Edit" (lower right).
- The Definition dialog will open.
- From within Definitions, Under "Edit Items" click on the "ADD" button.
- The "Edit Definition" dialog will open.
- In the left column, enter the name of the new fee schedule. If the new fee schedule is for normal insurance or cash, then leave the right column blank. However, if the fee schedule is Capitation (C0-Pay) or an Allowed amount fee schedule then in the right column enter C for Co-Pay (Capitation) or A for Allowed.
- Click on the "OK" button
- When finished, click on the “Close” button from within the Definition dialog.

Enter Fees

- From within the "Procedure" list dialog, highlight the fee schedule (upper right) that is going to be used.
- Locate the desired code and double left click on the fee field, the “Edit Fee” dialog will open.
- Enter the fee and click on the "OK" button.

Enter Carriers

- Click on “List”, click on “Insurance Carriers.
- The Insurance Carrier List dialog will open.
- Click on ADD button.
- Enter carrier information, and then click OK.

Add New Account

- Click on FAMILY button.
- Click on Select Patient button (upper left)
- The “Select Patient” dialog will open.
- In the upper right, enter the new patient’s last and first name.
- Under Add New Family (lower right), click on ADD.
- Populate fields as required.
- Click OK.

Add New Family Member to existing Account

- Go to the family account that you want to add a new family member
- Click on “Add” button.
- Populate fields as required.
- Click OK.

Add Insurance Plan to The Subscriber of The New Family Account

- In the Family Module, from within the “Family Members” list, click on the subscriber of the insurance plan.
- Click on the “Add Insurance” button (Upper Right).
- It will ask if this patient is the Subscriber, click on the “YES” button.
- The “Edit Insurance Plan” dialog will open.
- Populate the required fields.
- Click on ‘Edit Benefits”, enter the benefits, deductible, and percentages, click the ‘OK” button. Then click the “OK” button from within the Edit Insurance Plan.

Add insurance Plans to Each New Dependent Family Member

- In the Family module, from within the “Family Members” list, click on the desired dependent family member.
- Click on the “Add Insurance” button.
- It will ask if this patient is the subscriber, click on the “NO” button.
- A list of the all the family members will appear.
- Double click on the subscriber’s name.
- Double click on the insurance plan.
- The Edit Insurance Plan dialog will open.
- In the upper left, click on the down arrow button in the “Relationship” field.
- Click on the “OK” button.

Enter Completed Treatment

By Chartable Treatment

- From the patient's Chart module in the "Tooth Chart" select the tooth that the treatment is to be applied to.
- Click on the surface or surfaces.
- Select the "Entry Status" of "C" (For Complete).
- Under “Or Single Click”, click on the procedure type.
- The Procedure will be added to the "Progress Notes" in the Chart module and the Account module.

By Procedure List

- Click on the "Procedure List" button
- The Procedure Code List will open.
- Double click on the selected procedure, if the procedure is not a chartable procedure then the procedure will be posted in the patient's Progress Notes.
- If the procedure is chartable then the "Procedure Info" dialog will open.
- There will be red exclamation marks next to the fields that need to be populated.
- Populate these fields and click on the “OK” button.

By ADA Code

- In the “Or Type ADA Code” field, type the ADA code and click on the "OK" button or press the Enter key on the keyboard.
- If the procedure is not a chartable procedure then the procedure will be posted in the patient's Progress Notes.
- If the procedure is chartable then the "Procedure Info" dialog will open.
- There will be red exclamation marks next to the fields that need to be populated.
- Populate these fields and click on the “OK” button.

Create Insurance Claim

Create Insurance Claim for All Unsent Procedures

- From the Account module, click on the "New Claim" button.
- The "Edit Claim" dialog will open with all the unsent procedures attached to the claim.
- To print the claim now, click on the "Print" button.
- To send this claim to batch, click on the "OK" button in the lower right.

Create Insurance Claim for Selected Procedures

- From the Account module, hold the "Ctrl" key down on the Key Board and click on the desired “Unsent” procedures to highlight them.
- Click on the "New Claim" button.
- The "Edit Claim" dialog will open with all the unsent procedures attached to the claim.
- To print the claim now, click on the "Print" button.
- To send this claim to batch, click on the "OK" button in the lower right.

Enter Matched Ins Payments

Insurance Payment Splits by Total Claim Payment

- From the patient's account module, double left click on the claim that is listed on the EOB.
- The "Edit Claim" dialog will open.
- In the upper right of the "Edit Claim" dialog, under "Enter Payment", click on "Total".
- The "Edit Claim Procedure" dialog will open.
- In the lower right, under "Claim Info", verify that the figures are correct for each field, if not, then correct each field as needed.
- When finished, click on the "OK" button in the lower right.
- Repeat for all patients listed on the EOB.
- On the last patient, after posting the payment and while still in the Edit Claim dialog, click on the “Create Check” button.
- Verify that Payment Split list matches the EOB list.
- Verify that the dollar amount matched the total of the insurance check.
- Enter the check number and click the “OK” button.
- Remember to Create Check before moving on to another EOB (Insurance Check).

Insurance Payment Splits by Procedure

- From the patient's account module, double left click on the claim that is listed on the EOB.
- The "Edit Claim" dialog will open.
- In the upper right of the "Edit Claim" dialog, under "Enter Payment", click on "By Procedure".
- The "Enter Payment" dialog will open.
- Double left click on the procedure that a payment will be matched to.
- The "Edit Claim Procedure" dialog will open.
- In the lower right, under "Claim Info", verify that the figures are correct for each field, if not, then correct each field as needed.
- Repeat for all the procedures listed on the insurance claim.
- Repeat this process for all patients listed on the EOB.
- On the last patient, after posting the payment and while still in the Edit Claim dialog, click on the “Create Check” button.
- Verify that Payment Split list matches the EOB list.
- Verify that the dollar amount matched the total of the insurance check.
- Enter the check number and click the “OK” button.
- Remember to Create Check before moving on to another EOB (Insurance Check).

Enter Patient Payment

- From the selected patient’s account module, click on the “Payment” button.
- The "Payment" dialog will open.
- Populate the fields in the upper left as needed. Select a payment type.
- Enter any desired payment notes.
- Click on "OK" button.

Enter Appointment

- Click on Appointment button (upper left).
- The Appointments module will open displaying the current day.
- Use current date or select a date from the calendar then double left click on the desired time slot for a specific Operatory.
- The “Select Patient” dialog will open displaying the last patient that you were just in.
- If this is the patient that needs the appointment, then double left click on the desired patient name.
- If this is not the desired patient, then use the "Search By" in the upper right. Here, you can search for patients by "Last name", "First name", "Phone number", "Address", "City", "State", "SSN", "Patient Number", and "Chart Number".
- Once the patient has been selected, the “Appointments For Patient” will open.
- Click on the "Create New" button.
- The "Edit Appointment” dialog will open.
- If needed, you may enter appointment notes, these notes will appear on the appointment.
- If you want to assign treatment to this appointment, then select the treatment form the "Quick Add" column (Quick Add is user defined from Definitions) or from the "Procedure" column (the Procedure column contains Treatment Plan procedures).
- When finished, click on the "OK" button.
- The appointment will be pasted to the per-selected time slot in the selected Operatory.