Orthodontic Setup

- Patterson EagleSoft includes features to make billing for orthodontic treatment simple for offices who provide these types of services.

- In this session we will discuss:
  - Patient setup
  - Treatment plan/Walkout options
    - Service Code setup
    - Exploding Code setup
  - Chart/Quick Pick button setup
  - Appointment type setup
  - Recall type setup
  - Payment plan setup
  - IntelliCare setup
  - Reporting
Orthodontic Setup

- Patient Setup
  - Define patient under orthodontic care under Edit Patient/Preferences
    - Designate months of treatment
    - Designate start date for treatment
    - Designate insurance billing frequency
      » By defining the billing frequency, you will have the ability to utilize the Orthodontic Patients by Insurance Billing Period Report report for periodic insurance billing

- Treatment Plans
  - Utilize the options available under Lists/Exploding Codes to create plans for orthodontic treatment based on recommended length of treatment
  - Utilize the Pre-Authorizations to submit a statement of actual services for periodic insurance billing
Orthodontic Setup

- Walkouts
  - Utilize the options available under Lists/Services Codes to track monthly orthodontic appointments and attach auto notes to the service codes to quickly annotate consistent information regarding the appointment and treatment

- Chart/Quick Pick button setup
  - Create a Quick Pick button to store all services codes tied to Orthodontic appointments for quicker charting
  - Assign draw types to service codes for a visual identifier for Orthodontic treatment

- Appointment type setup
  - Create an Ortho Appointment type for easier appointment searching when utilizing OnSchedule templates
Orthodontic Setup

– Recall type setup-
  • Track Orthodontic recare by creating Recall types and assign them to your Ortho service codes

– Payment plan setup-
  • Distribute payment coupon books for patients under going orthodontic care by creating Payment plans for their total services
    – Input the down payment amount directly into the Truth-In-Lending contract as well as include the estimated insurance portion all within the Payment plan setup

– IntelliCare setup-
  • Create IntelliCare reminders and include patients marked as Ortho Patients to remind your staff of necessary information that needs to be captured for your Ortho patients
Orthodontic Setup

- Reporting
  - Orthodontic Patients by Insurance Billing Period
  - Orthodontic Patient Master
  - Recall Report to Ortho Recall Type
  - Account Receivable by Responsible Party for Ortho Patients only
  - IntelliCare Report