Welcome!!!





MAJERICK

DENTISTRY **EVOLVED**

Dental Laboratories, LLC

CMOShare

DENTAL MARKETING



OM Workshop:

Unlocking Leadership Brilliance In Dental Practice Management

November, 3rd-4th, 2023





Executive Director of Operations Dental Success Companies



- Peer to Peer Coaching
- Dental Savings
- Continuing Education
- Over 500 Downloadable Documents

- Rookie to Rockstar Virtual Training
- Over 500 Downloadable Documents
- Monthly Webinars (Office Hours)

Founder & CEO Sydology 101

Live OM Workshops, Private Office Manager Coaching, Team Training, Implementation and Strategies





What is an Office Manager?





What is an Office Leader?







Developing and Implementing Strategy Oversee Daily Operations Lead/Mentor Team Members

The office manager plays a critical role in running an efficient dental practice and delivering high-quality patient care.

Develop and Implement Practice Strategies

Develops, implements, and maintains office policies and procedures.

Lead weekly, monthly and quarterly meetings with a continuous growth and productive mindset.

Identifying patient-reported problems and implementing modifications to prevent recurrences.

Oversees Practice Marketing & Patient Retention.

Tracking Practice KPI.

Front Office Manual



Systemization Scorecard

Self-evaluation is a process we utilize in both school and in life. As we start this journey of systemizing your front office with you, we would like you to honestly reflect and use this checklist to help you see where improvement is needed. In each section, there are also sub-set checklists to focus on the strategies in that section. Go through this checklist to see how you measure up.

Foundation

We have defined our office Confirmation Policy.		
	We have defined our office Cancellation Policy.	
	We have a dedicated team member for Confirmation Calls.	
	We have defined the amount of time for each procedure for each doctor.	
	We have defined each doctor's preference for placement of high production and low production throughout the schedule.	
	We have decided which systems will be automated/third party. (insurance/confirmations)	
	We have defined our Payment Policy.	

Operational Systemization

We have selected our service providers for all automated/third party systems. (insurance/confirmation)
We have created the blockouts in our schedule to demonstrate our ideal schedule.
We have created easy to follow statuses within our dental software to indicate patients confirmation status and location while in the office.
We have decided which insurances we will be in network with and have started/finished credentialing.
We have created a system for tracking the ASAP List, Recall List, and Unscheduled List.
We have an organizational chart of responsibility.
We have a front office lead who has monthly meetings with an agenda.
We have a complete job description with task lists for each position within the front office.
We have created Performance Evaluations/Self Evaluations to be completed monthly.
We have created End of Day checklists for each team member based on their responsibilities.
We have created a patient billing cycle.
We have created a refund cycle for overpayments on patient accounts

Oversees Daily Operations

- Manage Patient
 Scheduling
- Support Business
 Goals and Financial
 Expectations
- Oversees Lifetime
 Patient Experience

- Manage Office
 Budget
- Oversee Hiring/Firing
- Ensure Sufficient
 Personnel For Daily
 Operations

- Manages the Financial health of the practice
- Ensures regulatory compliance with HIPAA, OSHA, Labor Laws and other federal, state, and local regulations.

Office Manager Job Description Example

Example Dental, LLC

Office Manager Job Description

The office manager is a key position for Capital Dental. This is the person who will ensure good business practices for the organization while the dentists and hygienists focus on providing dental care. But they also must be fully engaged in the unique environment and clientele of a health care setting, as well as interacting with clinicians and complying with governmental regulations.

Summary: The office manager is responsible for the non-clinical aspects of the day to day operations.

Essential Duties and Responsibilities:

- The office manager is responsible for the financial performance of the revenue cycle
- Patient scheduling, registration, financial counseling, medical records, billing and collection, data entry and processing, and cash posting
- Promoting excellent customer service by all levels of the staff
- Maintains and manages all filing and organizational systems for the practice
- Ensures patient satisfaction, including troubleshooting when there is a complaint and developing
 process improvements to prevent recurrences.
- Support business goals by utilizing schedules effectively and supporting the practice revenue objectives.
- Follow and demonstrate commitment to Capital Dental policies, professional expectations, clinical service excellence, and outstanding patient service.
- Other duties as assigned.
- Develops, implements, and maintains office policies and procedures
- Interviews, hires, and trains a productive medical office team and conducts performance reviews
- Coordinates staff meetings for administrative and clinical staff
- Coordinates logistics for internal and external meetings and conferences
- · Ensures staffing is appropriate for day to day operations
- Ensures regulatory compliance with HIPAA, OSHA, labor laws, and other federal, state, and local regulations.

<u>Qualifications</u>: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience:

- Knowledge of business and accounting processes usually obtained from an Associates or Bachelor's degree in Business Administration, Accounting, or Health Care Administration. Experience may substitute for education.
- Minimum of 5 to 7 years in a dental office setting.
- · Two to three years in a supervisory or management position.

Office Manager Job Description Example

Office Manager Training Plan

Packet includes: 30/60/90 game plan, positions checklist & scorecard

Job Description: The office manager's responsibilities include keeping the office running smoothly and efficiently. Additional focuses includes achieving growth and profitability benchmarks while embracing the core values and positive culture of the practice.

Goal: Become fully trained as an office manager, mastering all duties and tasks assigned within 90 days postemployment start date and during the duration of employment.

Office Manager Checklist- 30/60/90 Day Plan to Be Proficient In

- 1. Overall office duties
- 2. Lead morning huddle
- 3. Run and track all reports efficiently
- 4. Close out office
- 5. Schedule Prep

What each task includes:

- Overall Office Duties
 - Arrive 30 minutes prior to first patient
 - Spot check all EOD forms
 - Check office facility to ensure that common areas and departments are organized and cleaned.
 - Review schedule for any conflicts and opportunities
 - Confirm all lab cases in
 - Meet with Dr. prior to morning huddle

· Lead morning huddle and begin and end on time

- Ensure each team member is prepared and read to participate
- Ensure that:
 - · Same day treatment is prioritized and planned for
 - Recare opportunities are noted and accountability and expectations with team members is reinforced
 - · Balances are discussed with accountability for collecting is in place
- WINS for the office are highlighted daily
- Announcements

Tracking:

- Production
- Collections
- Reappointment percentages
- Attrition
- Case acceptance
- Same day treatment
- New patients and referrals
- Broken appointments
- Unconfirmed appointments 2 days out
- AR Reports- 30, 60, 90 days
- Hygiene production (3x pay?)
- Evaluate refunds
- Perio percentage
- Percentage of active patients active in the hygiene department

Daily/Weekly/Monthly Reporting

Daily

- Adjustments
- Payment by Provider
- Production & Income

- Unearned Income
- Overpaid
 Procedure
- Overpaid Claim

<u>Weekly</u>

- Office Expense Report (P&L)
- Patient and Insurance AR
- Unschedule Tx

<u>Monthly</u>

- Daily and weekly Reporting
- New Patient Report

Example Expense Report



Leadership Influence



Erica Dhawan is a best-selling author and an award-winning keynote speaker based out of New York. Live, hybrid, and virtual keynotes

Leadership Influence

Empower

Give your team members the tools and resources to execute their daily tasks efficiently.

Influence

Influence team members by actively listening, streamlining workflows and communications.

Inspire

Inspire team members to collaborate, innovate and take calculated risks.

Mastered

Master emotional regulations skills.

OMs and Marketing

With Ryan Gross





Operations and Marketing

Marketing is an important part of most dental offices. It is one of the foundation blocks to running a highly successful practice. On it's own marketing can contribute results but when combined with a strong operation is when marketing reaches is highest potential and ROI.

The best practices have the best systems and metrics.



Operations and Marketing

• Conversations I have with doctors and practice owners:

- Phone call answer rate
- Call conversions
- Online scheduling
- Availability
- Cancellations



You are a major component to the success of marketing





• How do you evaluate what you need to do?

- $_{\circ}$ Where are you at?
- $_{\circ}$ What is your goal?
- $_{\circ}$ What is your demand?
- $_{\circ}$ How do you reach your goal?



What Should I Do?

Looking to the numbers for the answer.

- Where are you at? 60 NPs
- What is your goal? 90 NPs
- What is your demand? 75 NPs
- o How do you reach your goal?
 - Need more availability to reach the current 75 NP demand
 - Need 15 more NPs
 - 11 through marketing and 4 through referrals





Number of inbound phone calls

- $_{\odot}$ Typically 8% of inbound calls are NPs
- Call answer rate
 - Goal of 85%
- Answered calls conversion rate
 - 85% if qualified





Disposition				
🕒 Answered	🔮 Voicemail	🕒 Unknown	🔓 Hangup	🕒 External

Call Status	Number of Calls
Answered	1,833 (90.7%)
Voicemail	68 (3.4%)
Unknown	68 (3.4%)
Hangup	50 (2.5%)
External	2 (0.1%)
Total	2,021 (100%)



Online Scheduling

- Is it set up correctly?
 - Exams, cleaning, consults for NPs
- Do you have availability?
- Check online scheduling each Monday. We check the practices we work with twice a month.
 - This will catch issues with the schedule and a potential loss of NPs.







Ok, let's compare calendars. Do any of these work for you?





Online Scheduling

- For every 1 schedule online conversion you should have .4 calls if there is availability.
- If you don't have availability you will see .2 calls for every 1 schedule online.
- Calls decrease from the website if there are little to no appointments online. People "shop" the online scheduling before calling.





- Are you sending out reminders 2 or 3 days before?
- Are you removing a patient from the schedule if they don't confirm?
- Are you moving NPs scheduled in advance to a cancelled appointment?
 - This will open up a NP spot in the future that is more likely to be filled.



Doctors can get frustrated when marketing doesn't work. Really it's just a marketing & operations disconnect. When operations are optimized, your marketing can be wildly successful.

- DR. ADDISON KILLEEN



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"How to Build a Profitable Billing Department"

A PPO Profits Product







**Everything we show that pertains to management software will be from Open Dental and Google Sheets

What is the Purpose of a Billing Department?

- Incoming Revenue
- Clean Claims
- Insurance Payments
- Accuracy of Insurance Payments
- Claims Follow up
- Patient Statements
- Patient Credits
- Customer Service

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Regardless of how big or small your office is, this position is KEY and should be handled with great care.



Check In

Check Out

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Treatment Coordinator Billing Department


Check-In Position



This position is responsible for:

Check-in for all patients

Checking and answering emails and texts

Appointment confirmation and NP paperwork sent to the patients prior to their Appointment

Ensure pts have signed treatment plans and payments have been collected prior to services rendered.

If not, send them to the check out station

Morning huddle preparation for next business day

List of expected Job Duties	Frequency
1st person to answer phones, check and respond to voicemails throughout the day (together with other	
front office team members)	Daily
Check emails (including junk folder) and and texts to update schedule as needed	Daily
Check-in all patients (using Venga and Open Dental appt status colors) and confirm any needed forms have been completed	Daily
Attach Insurance in Open Dental with uploaded Ins Breakdown and/or Fax back showing active coverage	Daily
Make appt confirmation calls (2 days out and 1 day out) and use Open Dental appt status colors	Daily
Scan Copy of Insurance Card into images along with Photo ID of the Pt	Daily
Reach out to patients via phone call and/or text who are 10+ minutes late to appt	Daily
Check schedule for patients needing paperwork/insurance updates (2+ days out) and contact via phone call and/or text	Daily
Fill hyg schedules (1 day to 1 week out) - Use ASAP list to fill appointments same day or nect day	Daily
Update any patient paperwork/medical history during check in process (med hx is updated 1 time per year)	Daily
Check office for cleanliness throughout (morning, mid-day, end-of-day) - ask for help from others as needed	Daily
Check mail by 3pm and sort out insurance payments for Insurance Coordinator/ check out and Dr	Daily
Check patient restroom (morning, mid-day, end-of-day) for cleanliness and stock supplies as needed	Daily
Have the Patient Sign their tx plan for the day's services	Daily
When checking in pt, change status to "pt ready"	Daily
Check voicemail and coordinate the schedule if any changes made to it	Daily
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End of Day duties BEFORE you leave:	
Prepare schedule for next day to go over for morning huddle?	End of Day
Prepare schedule for next day to go over for morning huddle?	End of Day
All Countertops wiped down and all papers put away	End of Day
Front Lobby Cleaned and Magazines placed in order	End of Day
TV turned off	End of Day
Order front office supplies as needed	Mid Month
Attach referral source for every NP being seen in office in Open Dental and Make sure to ask every pt how	Contract Contract
they heard about us if not filled out on NP paperwork	Monthly





Check-out Doctor and Hygiene patients Collect Accurate patient copays Fill Doctor and Hygiene schedule Submitting insurance claims after patient check-out

Ensure insurance is accurately estimated (2nd pair of eyes)

List of Expected Job Duties	Frequency
2nd person to Answer phones, (after 3rd ring) check and respond to voicemails throughout the day (together with other front office team members)	Daily
Check-out all patients - collect payments, provide estimates, and ensure next doc/hyg appts are booked	Daily
Prepare treatment plan estimates, send to patients, and follow up with patients to review estimates and schedule tx- 2nd person (Coverage for lunch if Tx or if Tx Coordinator is not available)	Daily
Review and update treatment plan tracker and make calls to follow up on unscheduled treatment	Daily
Fill doc schedules (1 day to 1 week out) - use Recall/Unscheduled/ASAP Open Dental lists and Divergent reports	Daily
Have pts sign tx plans and Collect all balances prior to pt being brought back	Daily
Process incoming letters from specialists (note next appt details on letter), scan into Open Dental once reviewed and initialed by doo, and schedule next appt as needed	Daily
Run Patient Portion Uncollected report (for previous day) and address issues as needed-	
Verify Insurance that it was inputted correctly when posting out treatment for the day	Daily
Verify that there is a signed tx plan in OD for services rendered that day	Daily
Petty Cash form filed out and signed	Daily
Check schedule for the next day and verify that each patietn has active coverage and a full verification of benefits scanned into their images	Daily
Close out EOD, run payment report and daily report to verify all tx has been posted under correct providers	Daily
Ask pts how their experience was and discuss google reviews	Daily
Ensure all patients leave with their next appointment and run query Report at EOD for next day morning huddle showing Attrition report	End of Day
Prepare and scan in daily deposit packet (including Daily Payments report from Open Dental, deposit slip, checks + EOBs)-	End of Day
Print Daily Production & Income report for each doctor from Open Dental-	End of Day
Reconcile Open Dental and Poynt electronic payments	End of Day
Verify Schedule for next day and add any financial notes needed	End of Day
Run Unearned Accounts, Unearned Allocation, and Net Unearned Income reports, allocate unearned income and send refund checks as needed-	Weekly
Send out and follow up on insurance pre-authorizations, send estimates once pre-auths are received, and schedule treatment	Weekly
Take all cash deposits to the bank within 48 hours	Weekly

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Treatment Coordinator	
RCM Profits	
This position is responsible for:	
Freatment Planning and estimating proper pt copays	
Accurately estimate Tx plans based on their insurance verification	
Preparing patients for their financial responsibility and explain treatment	
Nork the unscheduled treatment report when pts call and reschedule	
Credit Report	
Create ways for pts to start treatment	-
List of Expected Job Duties	Frequency
Responsible for all NPs from greeting, tour and establishing them into the office (X-rays, NP paperwork reviewed,	
Cone Beam scan or Pano taken)	Daily
Stay on schedule for each patient and notify front office if running behind	Daily Daily
Offer financing and payment options to start treatment same day	
Educate patients during thier visit to help them understand their treatment Fake IOC photos during the NP appointments to visually show what is needed- take photos of all existing	Daily
restorations/ visual fracted teeth, calculus, etc	Daily
Set Hygienist to do Perio Charting for each NP exam -make sure CAL, missing teeth and bleeding points are marked	Daily
Go over the pt's medical history and address any pt concerns	Daily
Complete NP Tracking form	Daily
Make sure a full verification form has been completed for each patient and scanned into images	Daily
/erify that all downgrades, MTC and Frequency limitations are accurately estimated into Software	Daily
ist all tooth numbers missing and existing restorations PRIOR to Dr in the room	Daily
every Radiograph taken is diagnosable to the Dr and Insurance	Daily
Be present for all exams done by Dr	Daily
/erify all insurance is entered in correctly, correct fee schedule is attached Prior to presenting treatment	Daily
Jnderstand each insurance accepted in the office. PPO, HMO or Medicaid plans	Daily
Find patient concerns, address each issue and brief the Dr On all issues and concerns in front of the patient to eliminate Repeating what the pt has already discussed with you	Daily
Fhorough chart notes are completed after each patient	Daily
Furn off all equipment at en <mark>d of day and sh</mark> ut down Open Dental	End Of Day
C redi t Report-Work on 20 ac <mark>counts p</mark> er wee k	Weekly
Nork the unscheduled treatment report when pts call and reschedule	Weekly
Sive Office Manager your weekly NP tracking form	Weekly
Sive Office Manager your weekly reports showing completion of a minimum of 80 accounts worked on the credit report	Monthly
Give Office Manager your weekly reports showing completion of a minimum of 60 accounts of unschedued tx reports	Monthly
Run new Unscheduled treatment reports on the 1st of every month	Monthly
Furn off all equipment at end of day and shut down Open Dental	
DURING DOWNTIME	
Help with Insurance verifications to ensure all have been completed for the next 48 hours of patients	Daily
Help Perio chart Hygiene patients in hygiene rooms as needed	Daily

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A PPO Profits Product



Treatment Acceptance Tracker

RCM Pro	ofits duct							
Week of:			New Patient Log Sheet		Tx Coord:			
Patient Name	DOS	Initial Visit LE/FMX	Tx Recommended	Scheduled for Tx?		Sched for Hyg?	3rd party financing offered	NOTES
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	illing and Insurance Coordinator	
	RCM Profits A PPO Profits Product	
This position is responsible fo		
Patient billing and A/R		
Processing insurance payments a	d following up on oustanding insurance claims	
End-of-day and end-of-month rep	orts/tasks	
Credit Report		
Pt statements and phone calls		

Send out all claims with Attachments

Auditing of all accounts to determine accurate patient credits and balances on account

List of Expected Job Duties	Frequency
3rd person to Answer phones, check and respond to voicemails throughout the day (together with other	Deilu
front office team members)	Daily
Audit account while posting insurance checks to see why patient has credit or balance on the account and update in Commlog	Daily
Post insurance checks and understand proper writeoffs, then scan EOBs into closed claims	Daily
Send out claims needing additional information to insurances for payment	Daily
Send out billing statements throughout week, as insurance checks are entered (via Modento email/text or mail)- 2 points of contact per month	Daily
Run Claims Not Sent Report (for previous day) and check Dental Xchange and address issues as needed	Daily
Run Procedures Not Billed to Insurance report (for previous day) and address issues as needed-	Daily
Send all claims from yesterday and today (add attachments and/or narratives and send out no later than next business day)	Daily
Schedule/coordinate and follow up on any needed equipment and facility, and IT maintenance/repairs	Daily
Send claim to clearinghouse-verify all pt information, tooth numbers are accurately posted prior to sending out	Daily
Verify all insurance is entered in correctly, correct iee schedule is attached if Insurance payment differs from OD estimate	Daily
Run Aging of A/R Report - Send out billing statements via Modento email/text or mail (30+ days overdue)	Weekly
Run Insurance Aging Report and Outstanding Insurance Claims Report and follow up on outstanding claims (30+ days)	Weekly
Run the OI report every 2 weeks to ensure all claims are on file as well as claim status for all claims over 15 days	Bi-Weekly
Overview of Outstanding Insurance Report- Shared Google Sheet	Mid-Month (15th of every month)
Overview of Outstanding Aging Report- Shared Google Sheet	Mid-Month (15th of every month)
Print monthly Production & Income report for each doctor from Open Dental on/around the 1st of each month	Monthly
Reconcile EFT Banking and OD to ensure all payments have been posted	Monthly
Work A/R Insurance report (30/60/90) and have completed by the end of month- This report is printed on the 1st of each month	Monthly

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Which Candidate is Qualified for This Position

- Second set of eyes to the dentist
- Must be able to read xrays
- Understand dental terminology and decipher chart notes
- Understands what attachments are needed when submitting claims
- Know what questions to ask insurance to get to the bottom of why claims were denied
- Know when to appeal a denied claim in order to get them paid
- Understand how Insurance contracts work with write offs and what the patient is allowed to be charged
- Understands your state laws regardless of what the EOB remarks state
- Know how to read EOB's and how to post insurance payments accurately



What Needs to be Established Before Staffing This Position

- Expectations of how often claims should be sent out
- Expectations of how often insurance payments should be posted
- Access to banking for EFT purposes
- When to appeal
- Understanding of how/when to Request a peer to peer review
- How to handle balances on accounts
- How to handle credits on accounts



What	Reason	Recommendation
No Payment	Time Filing	· ·
No Payment	Frequency-Hygiene-Exam	*
No Payment	Frequency-Hygiene-FMX	·
No Payment	Frequency-Hygiene-BWs	*
No Payment	Frequency-Hygiene-Prophy	*
No Payment	Frequency-Hygiene-PM	*
No Payment	Provider change not made	· ·
No Payment	Waiting period	*
No Payment	Frequency-Doctor-Redo	*
No Payment	Frequency-Doctor-Filling	v
No Payment	Frequency-Doctor-Crown	*
No Payment	Frequency-Doctor-Denture	*
No Payment	Not a covered Benefit	· ·
No Payment	Inactive insurance suspected	v
Balance	Underpayment from insurance	×
Balance	Downgraded	v
Balance	Deductible not collected	*
Balance	Alternative Benefit	v
Balance	Underestimate Copay	v
Balance	Understimated allowed amount	·
Balance	On payment plan	Office Modify Account
Balance	Incorrect Fee schedule/UCR fees Charged	Modify charges in patient account
No Payment	Medically unnecessary-Crown	Appeal with insurance company
No Payment	Medically unnecessary-Bridge	Appeal with insurance company
No Payment	More info needed	Appeal with insurance company
Balance	Outstanding Claim	Alert Insurance team
Balance	Doctor approved discount	Modify charges in patient account
Balance	No fee service charged to account	Write-Off
Balance	Full UCF fee charges for LOE/NP	Modify charges in patient account



Creating Track Stats in Open Dental

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Log	Off File	Setup Lists Reports			Select Category:			Hidden	
	Sele	Preferences		il 👻 🦳 WebMail 🖵 Text 👻 Lette	Account Colors	Definitions			
	P Print		•	Appt 🚺 Make Recall 👻 Unscl	Account Procs Quick Add Adj Types	Name Days Suppressed Hide		Name	Days Suppressed
Appts		Family / Insurance	•	OP1	Appointment Colors	Claim Received/ Processing 0		Appeal 1 Submitted	
ii	5am :10	Account	•		Appt Confirmed Appt Procs Quick Add	Resubmitted - No claim on file 0			
	:10	Chart			Auto Deposit Account	Paid - Not Cleared 0 Paid - Not Cleared Requested 0			
Family	:30	Imaging			Auto Note Categories Billing Types	Reissue of Pmt			
E \$:20 :30 :40 :50	Manage			Blockout Types	ORTHO 0			
Accour	6am	Advanced Setup	•		Carrier Group Names	Claim Denied - TFL 0			
		Alert Categories			Certification Categories Chart Graphic Colors	Paid for reprocessing 0 Claim Denied - Additional info 0			
1	:20 :30 :40 :50	Auto Codes			Claim Custom Tracking	submitted			
Tx Plan	:40	- Automation			Claim Error Code Claim Payment Groups	Needs Ofc Attention - Added to 0			
TAFIA	7am	Auto Notes			Claim Payment Tracking	asana Appeal 1 Submitted 0			
	:10				Clinic Specialties	Appeal 2 Submitted 0			
Chart	:30	Data Paths			Commlog Types Contact Categories	Claim Denied 0			
	:50	Definitions Display Fields			Diagnosis Types	Needs Office Attention 90+ Days 0			
	8am	Fee Schedules			eClipboard Images Fee Colors			X Delete	OK Cancel
Imagin	g :20	Laboratories			Image Categories Insurance Filing Code Group			1	
		Miscellaneous			Insurance Filing Code Group				
#	:50	Ortho			Insurance Payment Types Insurance Verification Status				
Manag		Practice			Letter Merge Cats				
	:20				Misc Colors Payment Plan Categories				
	:30	Program Links Quick Paste Notes			Payment Types				
	:40 :50				PaySplit Unearned Types				
Op 1	10am :10	Reports			Proc Button Categories Proc Code Categories				
	:20	Required Fields			Prog Notes Colors				
Op 2	:30 :40	Schedules			Prognosis Provider Specialties				
Op 3	:50	Security			Recall/Unsched Status				
	11am :10	Security Add User			Regions				
Doctor	:20	Sheets Sheets			Supply Categories Task Priorities	v			
000101	:40	Spell Check			Time Card Adj Types	Edit Items			
	:50	Tasks			Treat' Plan Priorities Web Sched Existing Appt Types	Add Hide A Up Down Alphabetize			
PtRead		Web Forms			Web Sched New Pat Appt Types				
Ph Ass	t :20 :30	Obsolete	•			Guidelines			
-	:40					Some offices may set up claim tracking statuses such as 'review', hold', 'riskmanage', etc.		1	
						Set the value of Days Suppressed' to the number of days the claim will be suppressed from the Outstanding Claims Report when the status is changed to the selected status.	1.1		RCM Profits
	1pm :10					Votetaniang clanne hepott when the status is changed to the selected status.	Close		A PPO Profits Product
	:20 :30 :40					· · · · · · · · · · · · · · · · · · ·			APPO Profits Product
	:40								



Track Status and when to use them

Paid Not Cleared - used when the claim was processed and the paid date is **less** than 60 days.

Paid Not Cleared- Requested Re-issue of Payment used when the claim was processed and the paid date is over 60 days.

*** There are insurances that requires that check must be outstanding for 90 days before a reissue can be initiated.

Paid for reprocessing - this is used when a payment is received however the claim needs to be reprocess.

Example: incorrectly paid as OON, paid but tx not completed, D4910 was paid as D1110.

Claim Received/ Processing - used when the claim is confirmed on file and is currently in process

ORTHO - used for ortho claims regardless of the status of the claim during claim trace

Resubmitted- No claim on file - used when claim is submitted and is not received by the insurance.

Claim Denied- TFL - used when confirmed that TFL is valid.

Claim Denied - Additional info. Submitted - used when the claim is soft denied for additional information e.g x-ray, PCH, narrative and PEOB.

Needs Ofc Attention - Added to asana - used when the information needed requires ofc help.

Example: COB update needed from the member

Appeal 1 Submitted - used when the claim is re-submitted for first reconsideration request

Appeal 2 Submitted - used when request for 1st reconsideration is denied and formal appeal is needed to be submitted to grievance department.

How to Create a Commlog

👖 Open Dental	{RCM-AM} - Test, Test	L - 791	U Definitions			? X Edit Definition	? X
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How to Create a CommLog

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I0/30/2023 7:41a Financial Phone Test- DOS 1/1/23 Patient balance was not collected at time of service. Patient owes \$35. BG Patient owes \$35. BG Patient owes \$35. BG Patient owes \$35. BG	

How to create a CommLog

Date	Patier	nt F	vor	Code T	th	Description	Charges	Credits	Balance				
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/2023	7:41a		Fina	incial	Phone	Test- DOS 1/1/23 Patient balance Patient owes \$35. BG	was not collected at b	me of servic	ce.	-			
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1st of the Month Reports

- Outstanding Insurance Report
- Appeals Tracker
- Pre auth only report
- Aging Report
- Credit Report
- EFT Report

A PPO Profits Product



Outstanding Insurance Report



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Outstanding Insurance Report

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ue Cross Blue Shield of IL	(800)541-2763		2023		Resubmitted- No claim on file		6862.00	
areington	1(888)878-8959		2023	09/29/2023	-	01/01/0001	685.00	
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areington Benefit Solutions	(833)468-4340		2023	08/16/2023	Claim Received/ Processing	10/12/2023	1012.00	
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elta Dental Of California	(888)335-8227		2023	07/24/2023	Paid Not Cleared	09/08/2023	479.00	
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elta Dental of Illinois	(800)323-1743		2023	10/09/2023	Resubmitted- No claim on file	10/09/2023	734.00	
elta Dental of Illinois	(800)323-1743		2023	10/09/2023	Resubmitted- No claim on file	09/19/2023	570.00	
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Outstanding Insurance



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2	Aetna	(800)451-7715	<u> </u>	10/05/1/		101 0	12/25/1997	07/13/2023	07/17/2023	-	01/01/2001	685			
3	Aetna	(800)451-7715					12/25/1997	07/18/2023	07/19/2023	-	01/01/2001	1078			
4	Aetna	(800)451-7715		ام م ام م		linfo	10/09/1985	07/18/2023	07/20/2023	-	01/01/2001	155			
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6	Anthem Blue Cro	(877)567-1804					01/19/1984	03/22/2023	03/24/2023	ORTHO	07/06/2023	5816			
7	Beam Plus Netw	(800)648-1179					02/09/1998	06/17/2023	06/21/2023	•	01/01/2001	206			
8	Blue Cross Blue	855-5042583					05/12/1999	06/24/2023	07/24/2023	Resubmitted- N	07/24/2023	508			
9	Blue Cross Blue	855-5042583					05/12/1999	07/01/2023	07/24/2023	-	01/01/2001	508			
10	Blue Cross Blue	(800)541-2763					04/10/1960	06/20/2023	07/14/2023	-	01/01/2001	290			
11	Cigna	(800)244-6224					04/04/1995	04/15/2023	04/25/2023	ORTHO	07/06/2023	5816			
12	Cigna	(800)244-6224					10/22/1986	07/06/2023	07/10/2023	-	01/01/2001	508			
13	Cigna	(800)244-6224					01/24/1991	07/15/2023	07/19/2023	-	01/01/2001	732			
14	and a second s	(800)244-6224					05/21/1990	07/17/2023	07/20/2023	-	01/01/2001	637			
15		(800)244-6224					01/24/1991	07/24/2023	07/24/2023	-	01/01/2001	1523			
16	Delta Dental of A	(800)352-6132					10/14/1987	07/10/2023	07/12/2023	-	01/01/2001	2711			
17	Delta Dental Of	(888)335-8227					04/04/1997	07/20/2023	07/24/2023	-	01/01/2001	479			
18	Delta Dental of I	(800)323-1743					07/25/1990	05/16/2023	07/24/2023	-	01/01/2001	285			
19	Delta Dental of I	(800)323-1743					07/08/2019	06/26/2023	07/20/2023	Resubmitted- N	07/20/2023	436			
20	Delta Dental of I	(800)323-1743					11/25/2017	06/26/2023	07/20/2023	Resubmitted- N	07/20/2023	436			
21	Delta Dental of I						05/27/1993	07/01/2023	07/10/2023	Claim Received	07/20/2023	479			
22	Delta Dental of I						04/12/2021	07/05/2023	07/29/2023	-	01/01/2001	192			
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24	Delta Dental of I	(800)323-1743	1				02/21/1986	07/06/2023	07/10/2023	-	01/01/2001	592			
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Pre Authorization Report

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Pre Authorization Report

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1	Carrier	Phone	SubName	SubDOB	SubID	PatName	PatDOB	DateService	DateSent	TrackStat	DateStat	Amount	
2	Aetna	(800)451-7715					12/03/1990	01/01/2001			01/01/2001	5124	
3		crc (877)567-1804				t lof	01/19/1976	01/01/2001	05/18/2023	-	01/01/2001	10684	
4	Blue Cross Blu	e (800)541-2763	Red	lacted	Patien	it into	08/17/1982	01/01/2001	03/08/2023	-	01/01/2001	6202	
5	Delta Dental of	((800)521-2651					03/12/1971	01/01/2001	09/13/2023	-	01/01/2001	3374	
6	Delta Dental of	New Jersey					11/24/1983	01/01/2001	07/10/2023	-	01/01/2001	3374	
7	Humana PPO	(800)833-2223					02/25/1949	01/01/2001	08/14/2023	-	01/01/2001	9300	
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RCM Profits A PPO Profits Product



Accounts Receivable Report



Reports 12 Setup User Query Laser L Lists Production and Income Today Active Pat Yesterday Appointme Last Month Birthdays This Year Broken Ap More Options Discount Monthly Production Goal Insurance New Patie Patients -Patient No Prescription Daily Procedure Referrals Adjustments Referral A Incomplete Procedure Notes Referred F Patient Portion Uncollected Treatment Payments Web Sche Procedures Hidden Pa Routing Slips ERAs Auto Unfinalized Insurance Payments Write-offs Public Heal FQHC De Raw Scree Monthly Raw Popu Aging of A/R Capitation Utilization Claims Not Sent Custom Aging Finance Charge Report Insurance Aging Report Insurance Overpaid Ins Pay Plans Past Due Outstanding Insurance Claims Payment Plans PPO Write-offs Presented TreatPlan Production Presented TreatPlan Statistics Procedures Not Billed to Insurance Procedures Overpaid Additional "reports" are available in other sections of the program as v

* All appointment lists are printable, including recall and confirmation list

* Labels, letters, and postcards are built into various windows.

* Deposit slips, accounting, sent claims, and images are all printed from * Use the print screen tool to print anything you can bring up on the sc



Accounts Receivable Report

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Accounts Receivable Report

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uarantor	0-30 Days	31-60 Days	61-90 Days	> 90 Days	Total	-W/O Est	-Ins Est	=Patient		
	0	1,098.20	0	0		0	0	1,098.20		
	0	0	2,972.60	0	2,972.60	520	1,127.80	1,324.80		
	0	1,053.50	0	0	1,053.50	560	493.5	0		
	0	0	45.6	0			0			
Redacted	8,074.00	10,578.00		1,297.02	21,568.02			20,942.02		
	0	234	0	0	234	68	166	0		
Patient Info	0	0	0	175.8	175.8	0	0	175.8		
	643.8	0	0	0	643.8	108	535.8	0		
	131	0	0	0	131	48	83	0		
	0	1,207.20	0	0	17.556.00 (S.M. S.M. S.M. S.M. S.M. S.M. S.M. S.M	0	520.8	686.4		
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	4,375.00	0	0	0	4,375.00	1,515.00	2,860.00	0		
	532.4	0	0	0	532.4	237	295.4	0		
	643.8	0	0	0	643.8	243	709.2	-308.4		
	227.25	0	0	0	227.25	48	179.25	0		
	0	0	479	0	479	0	0	479		
	204	0	0	0	204	96		-60		
	573.4	0	0	0	573.4	238	335.4	0		
	2,022.50	0	0	0	2,022.50	936	1,086.50	0		
	0	1,531.00	0	0	1,531.00	0	0	1,531.00		
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	0	0	479	0	479	0	0	479		
	215	0	0	0	215	87	128	0		
	0	114	0	0	114	114	0	0		
	2,405.00	0	0	0	2,405.00	949	1,456.00	0		
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Patient Credit Report



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Patient Credit Report

Guarantor	0-30 Days	31-60 Days	61-90 Days	> 90 Days	Total		-W/O Est	-Ins Est	-	Patient	
	0	0	0	0	0	-181.35		0	0	-181.35	
		0	0	0	0	-70.6		0	0	-70.6	
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patie		0	0	0	0	-45.15		0	0	-45.15	
-		0	0	0	0	-412.4		0	0	-412.4	
info		0	0	0	0	-108		0	0	-108	
		0	0	0	0	-5.6		0	0	-5.6	
		0	0	0	0	-222		0	0	-222	
		0	0	0	0	-80		0	0	-80	
		0	0	0	0	-63.6		0	0	-63.6	
		0	0	0	0	-170		0	0	-170	
		0	0	0	0	-10		0	0	-10	
		0	0	0	0	-81.2		0	0	-81.2	
		0	0	0	0	-99		0	0	-99	
		0	0	0	0	-26		0	0	-26	
		0	0	0	0	-440.4		0	0	-440.4	
		0	0	0	0	-3		0	0	-3	
		0	0	0	0	-9.9		0	0	-9.9	
		0	0	0	0	-763		0	0	-763	
		0	0	0	0	-18.57		0	0	-18.57	
		0	0	0	0	-75		0	0	-75	
		0	0	0	0	-374.4		0	0	-374.4	
		0	0	0	0	-187.2		0	0	-187.2	
		0	0	0	0	-1		0	0	-1	
		0	0	0	0	-372.6		0	0	-372.6	
		0	0	0	0	-36.95		0	0	-36.95	
		0	0	0	0	-86.4		0	0	-86.4	
		0	0	0	0	-10.8		0	0	-10.8	
		0	0	0	0	-14.3		0	140.4	-154.7	
		0	0	0	0	-99		0	0	-99	
		0	0	0	0	-112		0	0	-112	
		0	0	0	0	-15.45		0	0	-15.45	4

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TOTAL	10	5	9	10.00%	

Share Your Reports


15th of the Month Reports

- On the 15th the only report updated is the OI Report. All other reports are completed for the entire month.
- The OI Report is changed to date sent, and generated the same way.
- On the spreadsheet, add another tab and label it OI 15
- Add a line in the tracker to calculate % worked for the new report



Outstanding Insurance Report- 15th



User Query	Laser L
Production and Income	Lists
Today Yesterday Last Month This Year More Options Monthly Production Goal	Active Pat Appointme Birthdays Broken Ap Discount I Insurance New Patie Patients -
Daily	Patient No Prescriptio Procedure
Adjustments Incomplete Procedure Notes Patient Portion Uncollected Payments Procedures Routing Slips Unfinalized Insurance Payments Write-offs	Referrals Referral A Referred F Treatment Web Sche Hidden Pa ERAs Auto
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Aging of A/R Capitation Utilization Claims Not Sent Custom Aging Finance Charge Report Insurance Aging Report Insurance Overpaid Ins. Pay Plans Past Due Dutstanding Insurance Claims Payment Plans PPO Write-offs Presented TreatPlan Production	Raw Popu
Presented TreatPlan Statistics Procedures Not Billed to Insurance Procedures Overpaid	

* Use the print screen tool to print anything you can bring up on the sc



Outstanding Insurance Report- 15th

Filters	-				1							- 0
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(max)	blank to show all)		Ignore Custom 1	Tracking 🗌	For User All		~ Mir	ne Last	Error Definition Nor	e	~ (Refresh
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Carrier	Phone		me SubDOB	SubID	PatName		DateService			DateStat		
Aetna	(800)451-77	15				02/21/1989	08/14/2023	09/18/2023	Paid Not Cleared	10/03/2023	792.00	
Aetna	(800)451-771					03/27/1978	09/09/2023	09/12/2023	-	01/01/0001	603.00	
Blue Cross Blue Shield	(800)972-838	Re Re	edacted	Pati	ent	05/12/1999	06/24/2023	09/20/2023	Claim Received/ Processing	10/03/2023	508.00	
Blue Cross Blue Shield	(800)972-838	¹² In	fo			05/12/1999	07/01/2023	09/20/2023		10/03/2023	508.00	
Blue Cross Blue Shield of IL	(800)541-276	53				08/07/1948	07/12/2023	09/29/2023		10/09/2023	6862.00	
Careington	1(888)878-89	959				02/12/1974	09/28/2023	09/29/2023	-	01/01/0001	685.00	
Careington Benefit Solutions	(833)468-434	40				06/20/1954	08/09/2023	08/10/2023	Claim Received/ Processing	10/12/2023	131.00	
Careington Benefit Solutions	(833)468-434	40				06/20/1954	08/16/2023	08/16/2023	Claim Received/ Processing	10/12/2023	1012.00	
Cigna	(800)244-622	24				11/13/1979	08/29/2023	09/05/2023	-	01/01/0001	3222.00	
Delta Dental Of California	(888)335-822	27				04/04/1997	07/20/2023	07/24/2023	Paid Not Cleared	09/08/2023	479.00	
Delta Dental of GA	(800)521-265	51				05/30/1991	09/13/2023	09/14/2023		01/01/0001	877.00	
Delta Dental of Illinois	(800)323-174	43				02/02/1981	09/06/2023	09/06/2023	-	01/01/0001	942.00	
Delta Dental of Illinois	(800)323-174	43				09/02/2009	09/06/2023	09/07/2023	-	01/01/0001	555.00	
Delta Dental of Illinois	(800)323-174	43				12/20/2010	09/06/2023	09/07/2023	-	01/01/0001	527.00	
Delta Dental of Illinois	(800)323-174	43				07/16/1966	09/07/2023	09/12/2023	-	01/01/0001	415.00	
Delta Dental of Illinois	(800)323-174	43				04/22/1968	09/07/2023	09/12/2023		01/01/0001	3994.00	
Delta Dental of Illinois	(800)323-174					10/26/1974	09/11/2023	09/12/2023		01/01/0001	302.00	
Delta Dental of Illinois	(800)323-174	43				02/02/1981	09/11/2023	09/12/2023	-	01/01/0001	698.00	
Delta Dental of Illinois	(800)323-174	43				07/10/1986	09/13/2023	09/14/2023	-	01/01/0001	652.00	
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Outstanding Insurance Report- 15th

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2	Aetna	(800)451-7715						07/13/2023	07/17/2023	-	01/01/2001	685		
3	Aetna	(800)451-7715						07/18/2023	07/19/2023		01/01/2001	1078		
4	Aetna	(800)451-7715						07/18/2023	07/20/2023	-	01/01/2001	155		
5	Aetna	(800)451-7715						07/20/2023	07/24/2023	-	01/01/2001	279		
6	Anthem Blue Cr	(877)567-1804						03/22/2023	03/24/2023	ORTHO	07/06/2023	5816		
7	Beam Plus Netw	(800)648-1179		R	edacte	he		06/17/2023	06/21/2023	-0	01/01/2001	206		
8	Blue Cross Blue	855-5042583						06/24/2023	07/24/2023	Resubmitted- No	07/24/2023	508		
9	Blue Cross Blue	855-5042583		na	atient I	nfo		07/01/2023	07/24/2023	-	01/01/2001	508		
10	Blue Cross Blue	(800)541-2763		P				06/20/2023	07/14/2023	-	01/01/2001	290		
1	Cigna	(800)244-6224						04/15/2023	04/25/2023	ORTHO	07/06/2023	5816		
2	Cigna	(800)244-6224						07/06/2023	07/10/2023	-	01/01/2001	508		
3	Cigna	(800)244-6224						07/15/2023	07/19/2023	-	01/01/2001	732		
4	Cigna	(800)244-6224						07/17/2023	07/20/2023	-	01/01/2001	637		
5	Cigna	(800)244-6224						07/24/2023	07/24/2023	-	01/01/2001	1523		
6	Delta Dental of	(800)352-6132						07/10/2023	07/12/2023	-	01/01/2001	2711		
7	Delta Dental Of	(888)335-8227						07/20/2023	07/24/2023	-	01/01/2001	479		
8	Delta Dental of	(800)323-1743						05/16/2023	07/24/2023	-	01/01/2001	285		
9	Delta Dental of	(800)323-1743						06/26/2023	07/20/2023	Resubmitted- No	07/20/2023	436		
0	Delta Dental of	(800)323-1743						06/26/2023	07/20/2023	Resubmitted- No	07/20/2023	436		
1	Delta Dental of	(800)323-1743						07/01/2023	07/10/2023	Claim Received	07/20/2023	479		
22	Delta Dental of	(800)323-1743						07/05/2023	07/29/2023	-	01/01/2001	192		
3	Delta Dental of	(800)323-1743						07/05/2023	07/29/2023	Resubmitted- No	07/29/2023	518		
4	Delta Dental of	(800)323-1743						07/06/2023	07/10/2023	-	01/01/2001	592		
5	Delta Dental of	(800)323-1743						07/12/2023	07/17/2023	-	01/01/2001	1239		
6	Delta Dental of	(800)323-1743						07/17/2023	07/20/2023	-	01/01/2001	570		
7	Delta Dental of	llinois						07/22/2023	07/24/2023		01/01/2001	109		
8		(800)323-1743						07/15/2023	07/19/2023		01/01/2001			
9	Delta Dental of							07/05/2023	07/10/2023	-/	01/01/2001	734		
0	Delta Dental of							07/15/2023	07/20/2023		01/01/2001			
1	Delta Dental of							07/17/2023	07/19/2023		01/01/2001			
32	Delta Dental of							07/22/2023	07/24/2023		01/01/2001			
33	Delta Dental of							07/22/2023	07/24/2023		01/01/2001			
34	Delta Dental Of							07/01/2023		Claim Received/				



Update OI 15 on Tracker

Page	TOTAL CLAIMS	WEEKLY GOAL	TOTAL REMAINING CLAIMS	% of COMPLETION	COMPLETED
OI	10	5	0	100%	10
OI 15	8	4	8	0%	0
Appeals	3		0	100%	3
Pre Auth	4		0	100.00%	4
AR	50	13	25	50.00%	25
Credits	125	31	62	50.00%	63
TOTAL	200	53	95	52.50%	105

** On the 15th of the month, the first OI report should be completed, Appeals and Preauths should be all sent for what needed to be sent so far, AR and Credits should be at least halfway finished.

- Submit your finished spreadsheet to the doctor, including an OI report finished twice, Pre Auth Report, Appeal Tracker, AR Report, and Credit Report
- Add a screenshot of Month End numbers after all posting has been completed
- Add a screenshot of Year to Date numbers after all posting for the month has been completed



Page	TOTAL CLAIMS	WEEKLY GOAL	TOTAL REMAINING CLAIMS	% of COMPLETION	COMPLETED					
01	10	5	0	100%	10					
OI 15	8	4	0	100%	8					
Appeals	3		0	100%	3					
Pre Auth	4		0	100.00%	4					
AR	50	13	0	100.00%	50					
Credits	125	31	0	100.00%	125					
TOTAL	200	53	0	100.00%	200					
+ =	Tracker 🔻 🕻	DI ▼ OI 15 ▼ A	ppeal Tracker 👻	Pre Auth 👻 A	R 🕶 Credits 🕶					

** Add two tabs to the report at the end of the month, label one EOM, and the other YTD





Reports	
Setup	
User Query	
Production and Income	
Today	
This Month	
Last Month This Year More Options Monthly Production Goal Provider Pavroll Summary [Locked] Provider Pavroll Detailed [Locked]	
Daily	
Adjustments Pavments Procedures Write-offs Incomplete Procedure Notes Routing Slips Unfinalized Insurance Pavments Patient Portion Uncollected	
Monthly	
Aoing of A/R Claims Not Sent Capitation Utilization	^

Claims Not Sent Cabins In Ot Sent Cabination Utilization Finance Charce Report Outstanding Insurance Claims Procedures Not Billed to Insurance PPO Write-offs Pavment Plans Receivables Breakdown Unearned Income Insurance Overbaid Presented TreatPlan Production Treatment Presentation Statistics Ins Pav Plans Past Due Insurance Axing Report

Additional "reports" are available in other sections of t

** Screenshot the End of month report



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10/01/2023 S	Day	Braduction		10/0	1/2023 - 10	,					
10/01/2023 S		Desduction			All Provid	ers					
		Production	Sched	Adj	Write-off	Tot Prod	Pt Income	Unearned Pt	Ins Income	Tot Income	
10/02/2023 M	Sun	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	lon	2,051.00	0.00	-480.00	-206.00	1,365.00	299.00	336.00	344.00	979.00	
	ue	2,153.00	0.00	-258.00	-279.00	1,616.00	671.97	-139.82	0.00	532.15	
	Ned	2,302.00	0.00	-264.00	-451.00	1,587.00	286.00	0.00	0.00	286.00	
	nu -	1,667.00	0.00	-140.85	-229.00	1,297.15	67.20	232.00	0.00	299.20	
	118	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	Sat	0.00	0.00	0.00	0.00	0.00	0.00	0.00	190.20	190.20	
	Mon .	5,285.00	0.00	-295.00	-1,200.00	3,790.00	1,548.35	0.00	0.00	1.548.35	
	Tue	2,024.00	0.00	-295.00	-1,200.00	1,722.00	841.04	-33.00	0.00	808.04	
	Ned	3,558.00	0.00	-240.00	-358.00	2,960.00	750.40	64.40	0.00	814.80	
	hu	5,230.00	0.00	-156.00	-120.00	4,954.00	300.00	0.00	0.00	300.00	
	Pri I	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	iat	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	Sun	0.00	0.00	-2.526.13	0.00	-2.526.13	900.71	-900.71	7,146.55	7,146.55	
	lon	2,484.00	0.00	-312.00	-351.00	1,821.00	3,140.80	393.20	0.00	3,534.00	
	ue	2,302.00	0.00	-228.34	0.00	2,073.66	737.40	4,025.00	692.66	5,455.06	
	Ned	4,078.00	0.00	0.00	-162.00	3,916.00	1,266.54	-11.10	0.00	1,255.44	
10/19/2023 T	hu	1,181.00	0.00	-120.00	-336.00	725.00	114.00	0.00	0.00	114.00	
	Ref.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	iat	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	Sun	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	lon	14,984.00	0.00	-1,621.60	-1,619.00	11,743.40	4,321.00	697.60	0.00	5,018.60	
	ue	4,535.00	0.00	-455.00	0.00	4,080.00	140.96	3,197.80	0.00	3,338.76	
	Ned	2,047.00	0.00	-120.00	0.00	1,927.00	481.96	59.00	0.00	540.96	
	THE I	2,404.00	0.00	-305.00	-423.00	1,676.00	814.00	1,121.60	0.00	1,935.60	
	1	0.00	0.00	0.00		0.00	0.00	0.00	0.00	0.00	
and the second se	Sat	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	ion	0.00	0.00	-2,650.20	0.00	-2.650.20	-784.95	784.96	12.654.35	12,654,35	
	ue	216.00	4,474.00	0.00	0.00	4,690.00	61.00	-61.00	0.00	0.00	
and and arrest 1 at		58.501.00	4,474.00	-10.172.12	-6.036.00	46,766.88	15,957.37	9,765.93	21.027.76	46.751.06	





Setup	
User Query	
Production and Income	
Todav	
Yesterday	
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Last Month	
This Year	
More Options Monthly Production Goal	
Provider Payroll Summary [Locked]	
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Daily Adjustments Pavments Procedures Write-offs Incomplete Procedure Notes	
Routing Slips	
Unfinalized Insurance Payments Patient Portion Uncollected	
Monthly	
Aging of A/R	~
Claims Not Sent	
Capitation Utilization	
Finance Charge Report	

Additional "reports" are available in other sections of t

Outstanding Insurance Claims Procedures Not Billed to Insurance

Presented TreatPlan Production Treatment Presentation Statistics

Ins Pay Plans Past Due

Insurance Aging Report

PPO Write-offs Pavment Plans Receivables Breakdown Unearned Income Insurance Overpaid ** Screenshot the This Year Report



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Annual Production and Income

01/01/2023 - 12/31/2023 All Providers

Month	Production	Adjustments	Write-off	Tot Prod	Pt Income	Unearned Pt Income	Ins Income	Total Income
Jan 2023	89,186.00	-7,375.73	-91.00	81,719.27	25,399.24	19,370.30	22,583.66	67,353.20
Feb 2023	65,265.00	-9,683.17	-19.00	55,562.83	23,154.23	4,010.19	20,595.71	47,760.13
Mar 2023	69,429.00	-9,678.49	-406.00	59,344.51	22,331.90	9,738.21	27,793.40	59,863.51
Apr 2023	51,036.00	-6,382.55	-128.00	44,525.45	10,974.56	13,985.39	12,893.75	37,853.70
May 2023	48,599.00	-6,013.32	-538.00	42,047.68	17,352.26	12,491.92	12,313.43	42,157.61
Jun 2023	59,708.00	-9,525.33	-636.00	49,546.67	15,883.94	12,008.25	17,051.91	44,944.10
Jul 2023	46,237.00	-14,429.76	-1,381.20	30,426.04	12,904.05	5,344.10	23,121.09	41,369.25
Aug 2023	74,082.50	-16,772.83	-2,878.00	54,431.67	18,168.67	21,051.03	21,738.65	60,958.35
Sep 2023	56,953.00	-11,210.12	-9,033.00	36,709.88	26,193.28	-3,968.55	26,650.48	48,875.21
Oct 2023	58,501.00	-10,172.12	-6,036.00	42,292.88	15,957.37	9,765.93	21,027.76	46,751.06
Nov 2023	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Dec 2023	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	618,996.50	-101,243.42	-21, 146.20	496,606.88	188,319.51	103,796.77	205,769.84	497,886.12

Total Production (Production + Adjustments - Write-offs); \$496,606.88 Total Pt Income (Pt Income + Unearned Pt Income); \$292,116.28

Total Income (Total Pt Income + Ins Income); \$497,886.12



How to Work Reports- OI

When working OI Report:

- Keep detailed notes of every conversation had with the insurance companies- this should be in a commlog and the track stat as well as your exported spreadsheet- Include reference numbers in your notes.
- Color Code your spreadsheet
- Appeal what you can
- Work with the OI Report in Open Dental While also working off of your Spreadsheet



How to Work Reports- OI



- Color coding is to be able to easily identify if the claim is finished, or what additional information is needed
- If you have more than one person working on this report, everyone should be using the same color coding system

- 5 Points of Information Needed for Claims Follow-up
- Recap of conversation with Rep
- Reference number
- Track Stat Update
- Color Coding
- Status update on Claim

1	LEGEND	
	NEEDS HELP ON REVIEWING DENIAL / CLAIM	
	FOR APPEAL	
	NO PORTAL/NOT ON PORTAL NEED TO CALL INS	
	PAID WITH NO EOB / PAID NEED TO CONFIRM IF CASHED	
1	ORTHO CLAIM	
	CURRENTLY WORKING	ON
	NEED TO FOLLOW UP	

How to work Reports- OI

Outstanding Insurance Claims										?	- 🗆
Days Old Date Range	Dat	te Range Applies To Date Sent	~	Treat Provs All		~	Last Custom	Tracking Status All		~	
Days Old (min) 30	(leave both	Preauth Options Excluding Preau	ths ~					Carrier			
(max)	blank to show all)		om Tracking	For User All		~ Mi	Last	Error Definition Nor	le	~ (
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Carrier	Phone	C 1 N		Claims	B (000	D. C.	D. C. I	T ICL	D. I. Ci. I		
etna	(800)451-7715		OB SubID	PatName	02/21/1989	DateService 08/14/2023	and the second se	TrackStat Paid Not Cleared	DateStat 10/03/2023	Amount 792.00	
					03/27/1978	09/09/2023	09/12/2023		01/01/0001	603.00	
etna	(800)451-7715			lant	03/2//13/8	03/03/2023	03/12/2023		01/01/0001	003.00	
lue Cross Blue Shield	(800)972-8382	Redacte	ed Pat	lent	05/12/1999	06/24/2023	09/20/2023	Claim Received/ Processing	10/03/2023	508.00	
lue Cross Blue Shield	(800)972-8382	Info			05/12/1999	07/01/2023	09/20/2023		10/03/2023	508.00	
lue Cross Blue Shield of IL	(800)541-2763				08/07/1948	07/12/2023	09/29/2023	and the second	10/09/2023	6862.00	
Careington	1(888)878-8959	9			02/12/1974	09/28/2023	09/29/2023	-	01/01/0001	685.00	
areington Benefit Solutions	(833)468-4340				06/20/1954	08/09/2023	08/10/2023	Claim Received/ Processing	10/12/2023	131.00	
areington Benefit Solutions	(833)468-4340				06/20/1954	08/16/2023	08/16/2023		10/12/2023	1012.00	
ligna	(800)244-6224				11/13/1979	08/29/2023	09/05/2023		01/01/0001	3222.00	
lelta Dental Of California	(888)335-8227				04/04/1997	07/20/2023	07/24/2023	Paid Not Cleared	09/08/2023	479.00	
elta Dental of GA	(800)521-2651				05/30/1991	09/13/2023	09/14/2023		01/01/0001	877.00	
elta Dental of Illinois	(800)323-1743				02/02/1981	09/06/2023	09/06/2023	-	01/01/0001	942.00	
elta Dental of Illinois	(800)323-1743				09/02/2009	09/06/2023	09/07/2023	-	01/01/0001	555.00	
elta Dental of Illinois	(800)323-1743				12/20/2010	09/06/2023	09/07/2023	-	01/01/0001	527.00	
elta Dental of Illinois	(800)323-1743				07/16/1966	09/07/2023	09/12/2023	-	01/01/0001	415.00	
elta Dental of Illinois	(800)323-1743				04/22/1968	09/07/2023	09/12/2023	-	01/01/0001	3994.00	
elta Dental of Illinois	(800)323-1743				10/26/1974	09/11/2023	09/12/2023		01/01/0001	302.00	
elta Dental of Illinois	(800)323-1743				02/02/1981	09/11/2023	09/12/2023	-	01/01/0001	698.00	
elta Dental of Illinois	(800)323-1743				07/10/1986	09/13/2023	09/14/2023	-	01/01/0001	652.00	
ale Daalat at Illiania	(000)000 1740				04/20/1000	00144/2022	00/00/0000		01/01/0001	1524.00	
	arrier/Plan Info		Patient/Su	bscriber Info			Custom Tra	acking			
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Event 1	Carrier Phone:		Subsc	riber Name:				pdate will change the Il of the claims in the g			040 040 00
Export	Group Number:		Subs	criber DOB:			Undate C	ustom Tracking	37 claim	Total	\$46,849.00
Print	Group Name:		Su	bscriber ID			Cobrase C	ustori Hacking	37 clain	15	Close



How to work Reports- OI

Carrier	Phone	PatName	PatDOB	SubID	SubName	SubDOB	DateService	DateSent	TrackStat	DateStat	Amount	Date Status Changed	NOTES
Aetna	(888)632-3862						04/04/2023	04/06/2023	-	01/01/2001	\$311.00	7/12/2023	Insurance payment posted today -ezb
Aetna	(888)632-3862						06/01/2023	06/02/2023	-	01/01/2001	\$166.00	7/12/2023	Insurance payment posted today -ezb
Aetna Dental	(800)451-7715	Doc	lantar	1 Dation	t Info		05/22/2023	05/29/2023	1.5	01/01/2001	\$120.00	7/12/2023	Insurance payment posted today -ezb
Assured Benefits	(800)247-7114	Rec	lacted	d Patien	t mio		04/20/2023	06/19/2023	Resubmitted - No claim on File	06/19/2023	\$166.00	7/12/2023	dos 4/20/23. Per IVR, ins has no claim on file for this DOS. Resent the claim via eclaim -ezb
BCBS Dental	(800)451-0287						05/18/2023	05/29/2023	-	01/01/2001	\$402.00	7/12/2023	dos 5/18/23. Per web, ins pd \$359 and \$1,488 on 6/27/23 to provider, pmt# We'll allow more time for pmt to post -ezb
BCBS Dental	(800)451-0287						05/18/2023	05/29/2023	-	01/01/2001	\$1,893.00	7/12/2023	dos 5/18/23. Per web, ins pd \$359 and \$1,488 on 6/27/23 to provider, pmt#We'll allow more time for pmt to post -ezb
BCBS of Mississippi	(800)257-5825						03/27/2023	06/21/2023	Resubmitted - No claim on File	06/21/2023	\$408.00	7/12/2023	dos 3/27/23. Per ins rep Tina, they don't have te claim and I should file it to BCBS of Tx. Resent claim to BCBS of TX -ezb
BCBS of Texas	(800)820-9994						05/17/2023	05/29/2023	-	01/01/2001	\$232.00	7/12/2023	dos 5/17/23. Per web, claim is not on file. Resent via eclaim -ezb
BCBS of TN	(800)523-1478						03/02/2023	03/14/2023	Claim Received/Proc essing	05/04/2023	\$2,124.00	7/12/2023	dos 3/2/23. Claim was already pd but ins cannot provide copy of EOB. We still do not have login to availityezb
BCBS of TN	(800)523-1478						05/18/2023	05/29/2023	-	01/01/2001	\$0.00	7/12/2023	Deleted claim, marked "do not bill" -ezb
BCBS of TX	(800)521-2227						05/03/2023	05/04/2023	-	01/01/2001	\$1,348.00	7/13/2023	Ins already pd the claim, verified check received and deposited, posted pmt -ezb
Blue Cross Blue Shield	(800)528-7264						06/01/2023	06/02/2023	-	01/01/2001	\$323.00	7/13/2023	dos 6/1/23. The pt has pediatric embedded dental plan and pt is already considered as an adult and therefore not eligible for dental benefits. Added to offc tracker to verify if there's other dental plan -ezb
Blue Cross Blue Shield Dental	(800)924-7141						04/12/2023	06/21/2023	Resubmitted - No claim on File	06/21/2023	\$544.00	7/13/2023	dos 4/12/23 Called ins and spoke with Jackie who verified pt has active coverage since 1/1/23. However, claim is still not on file. It appears that we are not yet enrolled in eclaim submission with BCBS TN. I added pt to offc tracker for assistance in mailing the claim. Per rep, they do not have email/fax# for claim submission -ezb
BlueCross BlueShield of Tennessee	(877)378-8601						01/19/2023	06/01/2023	Claim Received/Proc essing	05/04/2023	\$332.00	7/12/2023	dos 1/19/23. Claim was already pd but ins cannot provide copy of EOB. We still do not have login to availityezb
BlueCross BlueShield of Tennessee	(877)378-8601						05/31/2023	06/01/2023	-	01/01/2001	\$0.00	7/12/2023	Deleted claim, marked "do not bill" -ezb



How to Work Reports- OI

Edit Claim - 2	×		
Claim Status Sent - Verified Med/Dent Dental Med/Dent Dental			
Claim Type Primary Med/Dent Dental As Total Date of Service 09/19/2023 ClaimForm ADA 2012 Relationship Self By Procedure		Custom Tracking Status Update	? - 🗆 X
Date Orig Sent 09/20/2023 Bi her Coverage Change None		Curter Track Status	
Date Received Predetern Benefits			1
Split Claim		~	
Procedures # Date Prov Code Tth Description Fee Billed to Ins Deduct Ins Est Ins Pay Write-off Pat Resp Status Pmt Pay Tracking Remarks		Error Code	
2 09/19/2023 D2740 11 crown - 1236.00 1236.00 0.00 618.00 0.00 1236.00 1236.00 0.00 1236.00	A	None	
			-
		Note	
View ERA View EOB Totals 1236.00 0.00 618.00 0.00 1236.00 Recalculate Estimates			
Insurance Payments Finalize Payment Date Type Amount Check Num Bank/Branch Note Heasons underpaid: (shows on patient bill)			
Cick Batch after entering all ins payments for one EOB; or	DCM Drot		
This Claim Only	RCM Proi		
General Attachments Misc Medica Status History Crown, Bridge, or Denture Ortho Claim Note (this will show on the claim when submitted)			
No initial Replacement Is For Ortho			
Prior Date of Placement Date of Placement Date of Placement Months Total 0	A DDO Drofite Drodu		
For bridges, dentures, and partials, missing teeth must have been correctly entered in the Chart module. Months Remaining 0	A PPO Profits Produ		
Place of Senice Office			
Employment Related No V by our insurance carler.			
Accident Referring Provider		Update	Cancel
Accident Date Referral Number			
(does not cancel payment edits) Image: Conceler payment edits Image: Conceler p			
General Attachments Misc Medical Status History			
+ Add			
Claim Custom Tracking Status History			
	Code User		
10/27/2023 4:21 PM Claim Received/ Processing DOS 06/27/2023 - Per rep Kish, the claim was denied due to	RCM-AM		
freq. last D4910 was on March 2023. Freq is 1x 6 consecutive months. Requested copy of EOB. Ref# 2			
03571 ras			
08/21/2023 5:53 PM Resubmitted- No claim on file DOS 06/27/2023, Per web claim for D4910 is not on file.	RCM-AM		
verified claim information is correct and confirmed plan is active. Resent via e-claim ras			RCM Profits A PPO Profits Product
			A PPO Profits Product

Appeals Tracker

Dat	te Added	Pt Number	Insurance	DOS	Procedure	Notes	Status	Review Date	Final status
10)/17/2022		BCBS	08/11/2022	D2950	dos 8/11/22 Claim# 28. Ins denied D2950 #18 for necessity. Added to appeals tracker for further review -ezb	Submitted	11/9/2022	Denied
10)/24/2022		UHC	8/18/22	D7953	dos 8/18/2022. SEC, cl0, ins denied bone graft as records do not show this is needed topreserve the bone ridge for a removable denture,bridge or implant. Added to appeals tracker for further review -ezb	Submitted - 2nd appeal	12/14/2022	Denied
12	2/12/2022		UHC	10/21/2022	D2740 & D2950	dos 10/21/22. Per web, ins denied D2740 and D2950 #2 under claim#2due to necessity. Appeal created and sent to ins today by fax -ezb	Submitted	12/12/2022	Maxed
2	2/7/2023		DD of IL		D2740 & D2950	dos 9/15/22. claim# Insurance finished reviewing the claim on 2/1/2023. They upheld the previous denial and pt is responsible for the balance. Ins does not cover restoration/replacement of tooth structure that is lost up to attrition. Decay is not evident on the submitted documentation. Added to appeals tracker for further review -ezb	Created	2/20/2023	Denied
3	3/7/2023		UHC	1/17/2023	D2950	denied for necessity	Submitted	3/23/2023	Paid
3/	/21/2023		Cigna	10/12/2022	D7953	dos 10/12/22 SEC D7953 denied due to necessity. claim#D Added to appeals tracker for further review -ezb	Submitted	4/3/2023	Paid
3/	/28/2023]	BCBS of AZ	01/13/2023	D2950	dos 1/13/23. Claim#2 2. Ins denied D2950 #3 as ins did not find the treatment necessary. Adding this to appeals tracker so we can send an appeal to ins -ezb	Submitted	4/19/2023	Denied
3/	/28/2023]	UHC	01/11/2023	D2950	dos 1/11/23.Claim# 2950 was denied due to necessity. Added this to appeals tracker, we'll send an appeal to ins -ezb	Submitted	5/24/2023	Paid
04	/07/2023		BCBS	08/11/2022	D2950	dos 8/11/22. Ins reprocessed the claim and made \$25 additional pmt for crown. However, they still denied D2950 for necessityezb	Submitted	4/25/2023	Denied
5/	/24/2023]	Principal	03/29/2023	D4341	dos 3/29/23. Ins pd the claim but downgraded D4341 to D4342. Appeal created and sent to ins via fax today -ezb	Submitted	5/24/2023	Denied
8/	/10/2023		UHC	6/14/23	D2950	dos 6/14/23. ins denied build up for necessity. Adding this to appeals tracker for further review and appeal submission -ezb	Submitted	09/06/2023	Paid
8/	/23/2023]	Cigna	3/21/2023	D7953	claim#D review for appeal	Submitted	09/14/2023	
08	3/24/2023		UHC	4/12/23	D2954	dos 4/12/23. Per web, claim resubmission was denied for duplicate. I am adding this to appeals tracker to send formal letter for request to reprocess. Claim#ezb	Submitted	08/30/2023	Paid



How to work Reports- AR

Purpose of working the AR Report is to be able to catch patient balances and get those collected.

- Work this as close to the DOS as possible
- Send Necessary Statements
- Call Patients when needed
- Establish with your Doctor what arrangements can be made with the Patient
- All notes are created as a commlog so they are a part of the patient chart, even if you
 are not able to get ahold of the patient
- Detailed notes in commlog and family financial box if a balance or credit is left when the insurance has settled



Tips to lower your AR Report

- Establish why there is a balance and what was estimated incorrectly (if anything) so the mistake doesn't happen again.
- Review signed treatment plans if the insurance payment differs from what was paid
- Review fee schedules to ensure accuracy
- Possible downgrades not accounted for and how to add them into Open Dental
- If you are contracted with the insurance, you should enter insurance in as a PPO Percentage vs Category Percentage to ensure correct treatment plans
- Update fee schedules if needed
- Did the pt pay full estimated amount?
- At the time of Insurance posting, if patient is left with a balance send a statement right away



How to work Reports- AR

Guarantor	0-30 Days	31-60 Days	61-90 Days	> 90 Days	Total	-W/O Est	-Ins Est	=Patient	notes
	0	0	0	181.4	181.4	0	0	181.4	paid
	5,650.00	0	118	1,998.80	7,766.80	0	0	7,766.80	opEN CLAIM
Redacted	0	0	0	339.1	339.1	0	0	339.1	bdwo
Patient Info	0	0	0	271.4	271.4	0	0	271.4	open claim
Fallent Into	0	99	0	280	379	43	56	280	OPEN CLAIM
	0	0	0	373.71	373.71	0	193	180.71	OPEN CLAIM
	0	456	214	124.6	794.6	0	0	794.6	open claim
	0	0	0	39.1	39.1	0	0	39.1	statement
	244	0	86.54	0	330.54	148	196.8	-14.26	OPEN CLAIM
	0	0	0	153	153	0	0	153	bdwo
	0	150	0	626.99	776.99	0	0	776.99	statement
	0	325.7	0	0	325.7	0	0	325.7	statement
	0	0	0	100	100	0	0	100	statement
	0	68.36	0	0	68.36	0	0	68.36	statement
	0	0	244	0	244	104	129.6	10.4	OPEN CLAIM
	0	0	0	79	79	0	0	79	statement
	0	0	156	0	156	0	0	156	open claim
	0	680	0	460	1,140.00	0	0	1,140.00	statement
	0	1,140.00	0	0	1,140.00	544	436.8	159.2	OPEN CLAIM
	0	55	0	0	55	0	0	55	next visit
	0	0	533.6	0	533.6	0	533.6	0	OPEN CLAIM
	99	113.5	0	0	212.5	0	0	212.5	statement
	0	0	0	1,490.00	1,490.00	0	0	1,490.00	office answer
	0	228	0	0	228	0	0	228	paid
	0	0	0	317.2	317.2	0	0	317.2	bdwo
	0	461	0	0	461	0	461	0	OPEN CLAIM
	0	0	0	407.4	407.4	0	0	407.4	statement



How to work the Patient Credits Reports

- Establish with your doctor the amount of money to refund per month
- Audit first- never assume it is an accurate credit on the account. Ensure Patient has a true credit and Insurance didn't overpay or extra write offs were done
- Check for future work that patient might have pre paid for
- What unscheduled work does the patient have?
- Document all conversations with patients even if they are just left messages



Family	0-30 31-60			sEst =Est Bal	Pat Est Bal	Uneame	d Ins	Main Show		Fam Est Bal: (\$75.00)
Aging	0.00 0.00	0.00 0.0		00 -75.00	-75.00	0.00	Rem	Fam Urgent Fin Note		Employer: CCISD
Date	Patient	Prov Code 1	Patient Account th Descri	112-1	Charges	Credits B	alance			Carrier: Humana Dental (\$2
16/2021		Pay	CREDIT CARD \$150.00			150.00	28.00			P.O. Box Group: 530337
6/2021		Claim	Pri Claim \$204.00 Humana D	Dental						Family Insurance
			Received 06/05/2022 Payment: \$156.00					Service Date View		Primary Second
1/2022		D2391 2	Deductible Applied: \$50.00 O resin-based composite - o	one surface, posterior	204.00		232.00	Credit Card Manage		Fam Ded 150.00
1/2022		Pay	Ins Paid: \$80.00, Writeoff: \$ CREDIT CARD \$63.00	54.00, Pat Port: \$70.00		63.00	169.00	Select Patient		Individual Insurance
1/2022		Claim	Rec'd payment for DOS 02/0 Pri Claim \$204.00 Humana 0					Patient Bal		Primary Secon
1/2022		Cialin	Received 05/31/2022 Payment: \$80.00 Writeoff: \$54.00					-75.00 A Entire Family -75.00		AnnualMax 2000.00 Deductible 50.00
1/2022		InsPay	Deductible Applied: \$50.00 Insurance Payment for Clain Payment: \$80.00	n 02/01/2022		134.00	35.00			Ded Remain 50.00 Ins Used 0.00
5/2022		InsPay	Writeoff: \$54.00 Insurance Payment for Clair	m 12/16/2021		156.00	-121.00			Pending 0.00 Remain 2000.00
0/2022		D0120	periodic oral evaluation - es Ins Paid: \$44.00, Writeoff: \$1		57.00		-64.00	v		LACTORD
0/2022		D1110	prophylaxis - adult Ins Paid: \$88.00, Writeoff: \$1		99.00		35.00	Family Financial	LAST BW: 10/14/2021 LAST FMX: 10/14/2021	LAST SRP: LAST PM:
/2022		D1206	topical application of fluorid Pat Port: \$46.00		46.00		81.00		ENGINE TO THE SET	LAST PRO: 06/10/2022
0/2022		Claim	Pri Claim \$202.00 Humana [Received 06/28/2022	Dental					Recall Due: 12/11/2022	Scheduled: No
			Payment: \$132.00 Writeoff: \$24.00						Next Appt	First Visit: 10/14/2021
8/2022		InsPay	Insurance Payment for Clain Payment: \$132.00 Writeoff: \$24.00	n 06/10/2022		156.00	-75.00		Appt Status Prov Da	
				di General			Þ		Complete 11/18/2 Complete 12/16/2	
ate	Time Name	Type	Communications	Log No	te	_	-			
									Complete 02/01/2	
									Complete 06/10/2	Fluoride
R	ledact	ed Pa	itient Info						UnschedList	60 4BWX, F
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									32 31 30 29 28 27 24	25 24 23 22 21 20 19 18 17
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THINGS TO REMEMBER

- MISSING TOOTH CLAUSE: this will cause the patient to have 0 coverage for a tooth extracted prior to the effective date with their current insurance
- Implants: some insurances will not pay for an implant if there are no adjacent teeth. A Panorex **MUST** be taken prior to the procedure.
- Always push for full payment for every treatment scheduled, explain 3rd party financing options. If pt does not qualify, offer in house financing option, if applicable..
- If a crown- Offer to split the cost into 2 payments and have the patient return for 2 visits (crown prep and 2 weeks later, crown delivery)
- Always think about the patients, the less you talk the better the outcome. Be very extra, talk fast and be enthusiastic about each treatment plan. They only get the treatment they need, so <u>let them know it's</u> for their health and collect the \$\$\$!
- If an x-ray was taken that doesn't show the full apex of the tooth, insurances will most likely NOT pay for the submitted treatment.
- You WILL make mistakes, but it won't be the end of the world, just don't fuss about it, fix it, learn from it and move on!
- Insurances are a business; they are there to find every way NOT to pay us. We as the provider must find every way to maximize the patient's benefits while providing amazing care
- Make sure to always see if there is a downgrade to posterior teeth. This can refer to fillings and crowns. You will need to default these settings in your software to accurately estimate the copays
- Never present treatment unless you have verified your Insurance Breakdown. This is how mistakes are made.



Join us for a night of singing and dancing at Moe & Curly's Downtown!

Friday, November 2nd at 9 pm

1011 Capitol Ave, Omaha, NE 68102

The Art of Building The Ideal Team: A Masterpiece in Collaboration



The leaders in my practice actively listen and try to understand my perspective and needs.



Leaders in my practice take ownership of their mistakes.



Leaders in my practice strive to create a supportive and healthy work environment where I feel empowered, safe and valued.



Leaders in my practice genuinely believe in teamwork and collaboration.



Leaders in my practice invest in my professional growth, allowing me to meet my full potential.



How would you rate communication from leaders in your practice?



How would you rate your team culture?



How would you rate your office systems and processes?



If you could change one thing in your office, what would it be?

"Communication, We need to communicate front staff with back staff. We need to have employees who come to work everyday. We need everyone to be at the same standards. We believe some can do things and others cant. We need everyone even managers to follow rules." "Communication and input. Like most recent the schedule change. It would have been nice if we were told about it and was giving the reason why we were doing it and a chance to give our input so that we might have made the transition better.....

"The increase in phone calls, some help with the phones more communication between the back and front offices." "If I could change one thing in the office it would be better communication skills between the back of the office and the front."
If you could change one thing in your office, what would it be?

"We have a lot of good "word of mouth" processes. I would just recommend putting them in writing. Also, put on a shared drive/centralized location so everyone can reference them without contacting someone who is off from work."

"I would like to have more routine processes in place for guiding patients through their treatment plans. I would like to improve communication for increased treatment plan acceptance. I think we need a better process with helping patients finance large treatment plans." "I think we should follow stricter HIPAA regulations."

"How about 2......Clear definition of job duties among the admin staff and help the leaders hold others accountable."

Order Vs Chaos



Let's Put It All Into Action



Caroline Webb

"Ensuring that colleagues feel that workplace decisions are fair not only keeps their reward systems happy, but leaves people with more mental energy to focus on other things."

-Caroline



HARNESS THE POWER OF BEHAVIORAL SCIENCE TO TRANSFORM YOUR WORKING LIFE TO HAVE A CAROLINE WEBB

The Science Behind Effective Communication

Automatic System



Automatic System

Deliberate System

Is the part of your brain that operates on autopilot, handling routine tasks and responses with minimal conscious effort. This system is responsible for everyday habits, reactions, and behaviors that have become ingrained through repetition and experience.

Automatic System

Automatic System

- Reflex
- Unconscious
- Filters what you see and hear
- Fast Thinking
- Controls Freeze, Flight or Fight response



Deliberate System

The Deliberate system is the part of your brain that engages in thoughtful, conscious decision-making and is responsible for planning, analyzing, and strategizing. When you use the Deliberate system, you actively focus on specific tasks, set goals, and make intentional choices

Deliberate System

- Conscious Reasoning
- Self Control
- Emotional Self-Regulation
- Planning
- Forward Thinking

How Does This Affect Your Communication?

- The delibate system has limited capacity and can only focus on one thing at a time
- Automatic System can alter your attitude and reactions to tasks that you have deemed irrelevant or low priority
- Deficient Mental Energy

How Does Automatic and Deliberate System Affect Your Interaction With Your Team?

- Defensive Mood- Fight, Flight or Freeze
- Confirmation Bias
- Selective Attention
- Inattentional blindness

Defense > Discovery Mode

- Notice the signs
- Ask Questions
- Distance
- Personal Why



Reflection

Think of a time you were in a meeting or speaking with a team member and they refused to understand the importance of a task.

- Were they in defense mode or discovery mode?
- Were you affected by "Confirmation bias" preventing you from keeping an open mind?
- Did you dismissing the team members reasoning?

Humble, Hungry & Smart

• Humble

Lack excessive ego

Share credit

• Hungry

Self-motivated Delgent Always looking for more

Smart

People common sense

Emotional intelligence



Ideal Team Player Assessment

- The purpose of this assessment is to help develop team culture throughout the organization.
- This also helps you and your teammates understand how we all embody the three virtues of an ideal team player

The Ideal Team Player Self Assessment

Instructions:

Use the scale below to indicate how each statement applies to your actions on the team. Respond as honestly as possible, as this will allow you to most accurately identify any areas of development that you may have.

Scale:

3 = Usually 2 = Sometimes 1 = Rarely

Humble

My teammates would say:

- I compliment or praise them without hesitation.
- I easily admit to my mistakes.
- 3. I am willing to take on lower-level work for the good of the team.
- 4. I gladly share credit for team accomplishments
- ____5. I readily acknowledge my weaknesses.
- ____6. I offer and accept apologies graciously.
- Total Humility Score

Hungry

My teammates would say:

- 7. I do more than what is required in my own job.
- 8. I have a passion for the "mission" of the team.
- I feel a sense of personal responsibility for the overall success of the team.
- 10. I am willing to contribute to and think about work outside of office hours.
- 11. I am willing to take on tedious or challenging tasks whenever necessary.
- 12. I look for opportunities to contribute outside of my area of responsibility.
- Total Hunger Score

Smart

My teammates would say:

- I generally understand what others are feeling during meetings and conversations.
 I show empathy to others on the team.
- I demonstrate an interest in the lives of my teammates.
- 16. I am an attentive listener.
- 17. I am aware of how my words and actions impact others on the team.
- 18. I adjust my behavior and style to fit the nature of a conversation or relationship.
- Total Smart Score

How Does This Affect Your Leadership Skills?

- Hiring the right person who fits within these three virtues
- Delegating task
- Communication
- Builds Trust
- Recognition

Productive Time Management and Delegation skills

- **Prioritize Tasks:** Identify the most important and time-sensitive tasks. This can include patient scheduling ,inventory management, and staff coordination.
- **Time Blocking:** Allocate specific time blocks for different types of tasks. For instance, set aside dedicated periods for patient appointments, staff meetings, Training and Development and administrative work.
- **Delegate Wisely:** Understand your team's strengths and weaknesses, and delegate tasks accordingly. Empower your team members to take ownership of their responsibilities.



Let's Put It All Into Action



Intentional Goal Setting



Aim- What matters most? What do I want to get out of this?



Attention- Where do you want to direct your focus?



Attitude- What mood is dominating my thoughts? Do they help with what matters most? If not, can you push them aside?



Assumption- What negative expectations do you have going into a task or conversation?

Leadership Skills To Make This All Possible

- Mastering the art of servant leadership and what it means to have a leadership presence in your practice.
 - Humble, Hungry, Smart
- Intentional Goal Setting
 - Aim, Attitude, Attention, Assumption
- Recognitions and Rewards
 - Celebrate team members who take the initiative
- Feedback Loop
 - Giving team members the opportunity to share ideas and insights on process improvement
- Autonomy with Boundaries
 - Empower team members to take ownership in their task.



Wrap it in a bow

- Aim, Attitude, Check Your Assumptions, Attention
- GTRSD
- Humble Hungry Smart!!!!



2-Day OM Workshop 2023

Thank You!

