

Platinum Closing Procedures

1. Clear off schedule book with
R – Appoint.
Q – Missed appt ledger
2. Balance arrivals
B – Balance
P-Professional
Esc – for all or choose professional
, - Arrivals
Check to make sure that everyone has a billed time and all codes have been properly billed in the patient's transaction ledger.
3. Balance Income
B- Balance
P – Professional
Esc – for all or choose professional
R – Income
Make sure income balances with money taken over the counter for the day
Note – if money does not balance run (B-Balance, 7 – Transactions by method of payment) run for each type of method of payment that did not balance to check who paid.
4. Duplicate transactions
B-Balance
P – Professional
Esc – for all or choose professional
3 – Duplicate transactions
Make sure patient was not billed twice or patients that were have proper billing, codes and modifiers if necessary
5. Check all Transaction
B-Balance
P – Professional
Esc – for all or choose professional
T-Transactions
F10 to put in order by name
Make sure that all transactions that were put in for the day are correct with what should be billed.

6. After everything balances run summary
 - L- List Reports
 - P – Professional
 - Esc – for all or choose professional
 - I – Summary
 - 2 – General Summary
 - Y – to print statistics

Report will show statistics for the day, from schedule book, RQ , and patients that were charged for services that counted towards a visit. Plus all income, charges, write offs and payments.
7. Run Warning List
 - L-List Reports
 - S – Practice diagnosis and recalls manager
 - 2 – Warning list

First report tells all patients that came in today and have had less than 8 visits and left with no future appointments. Second report is for patients that have 8 or more visits and third report shows everyone that missed, reason and next appt.
8. Shut down Platinum on all computers including calling and arrivals
9. Run Daily task on Server (operations will be much faster). If not possible, run on Front Desk computer
10. Run Daily task
11. Run Index
12. Run Backup

Tip for speed:

To start faster in the morning and stop faster at night:

In the morning: Open Platinum System on the server and bring it to the front desk screen. Leave it open all day, even if you do not use it.

At night: Close all modules of Platinum, Calling, and Arrivals on all other computers except the server. When all other modules are closed, close Platinum on the server last.

Explanations: Every morning, the first computer opening Platinum is archiving databases and is resetting some components automatically once per day. Every night, the last computer to close Platinum is also performing some statistics operations and an automatic historic back-up file. These operations run much faster on the server since all the data does not have to run through the network.