Scheduling and Registering a Workers' Compensation Patient

1. When scheduling the patient's initial appointment, select the **Emergency-Dental** visit type.

2. Scroll down to the **Appointment Information** section, change the **Accident Related** field to **Yes**.

Create a Workers' Compensation Guarantor Account

1. On the Interactive Face Sheet, click the pencil (✏) icon to open the 💼 **Encounter Guarantor and Coverages** section.

2. Click ➕ **Add New Guarantor** to move forward with adding the Workers Comp guarantor.

3. In the **Guarantor Search/Create** window, click the **Workers Comp** speed button next to the **Account Type** field to select it.

4. The **Relationship to Patient** field will default to Self.

5. In the **Employer** field, select the patient's employer.

> ℹ The **Employer** field will default to self, if you can't find the employer, keep "OTHER" selected.

6. In the **Date of Injury** field, select the date that the incident occurred.

7. Click ✔ **Search/Create> Create** to proceed with creating the guarantor account for the patient.

8. In the **Claim Information Selector** tab that opens, you can select the claim associated to this incident.

   o If there are No available Claim Information records, you can click 🔄 **New Claim Information Record** to create a new record.

9. In the New Claim Information Record window, leave the **Name of the claim** field blank and click **Accept**.

   a. Fill in the **General Information** section:

      ▪ Enter **Accident(Injury)** in the **Illness, Injury, or Pregnancy?** field.

      ▪ Enter the date that the accident happened in the **Occurred** field.

      ▪ Enter as much information as you have about the claim in the remaining fields.

   b. Fill in the **Workers' Compensation & Accident Information** section:

      ▪ Enter **Workers' Compensation** in the **Accident Type** field.

      ▪ Enter **Mouth** in the **Body Part Disabled** field.

- Enter as much information as you have about the claim in the remaining fields.

c. Click ✔ **Done** to close the **Claim Info** tab.

10. Click the **close** (✖) icon to close the **Guarantor Edit** tab and return to the Interactive Face Sheet.

Add a Coverage to a Workers' Compensation Guarantor Account

1. On the Interactive Face Sheet, click 🖳 **Dental Eligibility** on the activity toolbar.

2. In the **Dental Eligibilty** window, click **Add Coverage**.

   a. In the ELIGIBILITY FORM, the subscriber will default to **Patient** and the coverage will default to **NEW**.

   b. In the **Subscriber/Member Details** section, enter the **Subscriber ID** number if known.

      - If unknown, enter the patient's MRN for now.

   c. In the **Search by Payer** section, search for and select the **GENERIC WORKERS COMP** coverage.

      > ℹ️ Even if the insurer is known, use the generic coverage as you will fill out the information later in the workflow.

3. In the next screen, click the **pencil** (✎) icon.

   a. In the **Select a Plan** section, click **select** next to the GENERIC WORKERS COMP plan.

4. In the POLICY EFFECTIVE section, fill in the **Effective From** date.

   a. Leave the rest of the fields blank on this form.

5. Click **Accept> Save Form & Send to Epic**.

6. Return to the Interactive Face Sheet, click the pencil (✎) icon to open the 💼 **Encounter Guarantor and Coverages** section.

7. Under the Unused Coverages section, click the **add** (➕) icon next to the Generic Workers Comp coverage.

8. Click ✔ **Close** to close the 💼 **Encounter Guarantor and Coverages** section.

Complete the Worker's Comp Insurance Information Form

1. Scroll down to the documents section and search for the name of the document you are searching for the **Worker's Comp Insurance Information Form** in the **New Document Type** field.

2. Click the **e-sign** (📝) icon to fill out the information.

3. Click ✔ **Accept** to close the **Documents** window.

Attach the Workers' Comp Guarantor Account and Coverage to the Appointment

1. When checking registration information for the emergency appointment, select the Workers Comp guarantor **tile** in the 💼 **Encounter Guarantor and Coverages** section.

2. Ensure the coverage is attached under the **Visit Coverages** section.

3. Scroll down to the **Appointment Information** section, change the **Accident Related** field to **Yes**.

4. Click ✔ **Accept** to close Registration.

Add Additional Information to a Workers' Comp Claim

If additional information such as workers' comp claim numbers or authorization numbers are received after the claim has already been opened, you can add them in.

1. Open the patient's 📋 **Registration**.

2. Select 🗂 **Claim Info** on the Registration activity toolbar.

3. Double-click on the claim to open it.

4. Enter any additional information into the appropriate form(s) and click ✔ **Done**.

5. Click ✔ **Accept** to close Registration.

Deactivate a Worker's Comp Guarantor Account

You would deactivate a guarantor account for a patient when the guarantor was once responsible for the patient's bills but is not anymore. Workers' compensation guarantor accounts should be deactivated once the claim has been paid and the case is closed.

1. Open the patient's Registration.

2. Click Pat Guar and Cvg on the activity toolbar.

3. In the Patient Guarantor Accounts section, select the Active check box to remove the check mark for the guarantor account that is no longer valid.

4. Click the close ( ) icon to close the Patient Guarantor Accounts tab and return to the Interactive Face Sheet.

5. Click Accept to close Registration.