
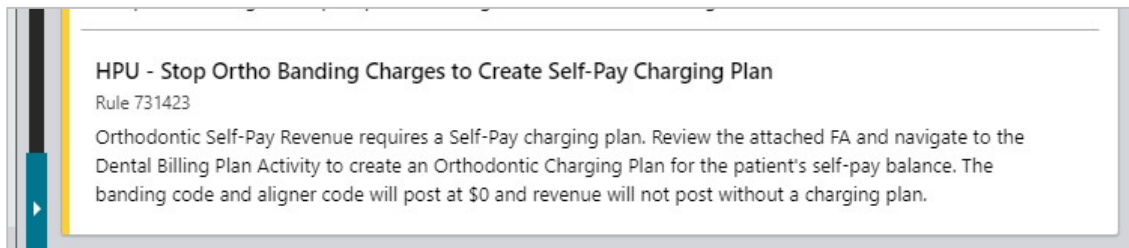


Setting Up an Orthodontic Self-Pay Charging Plan

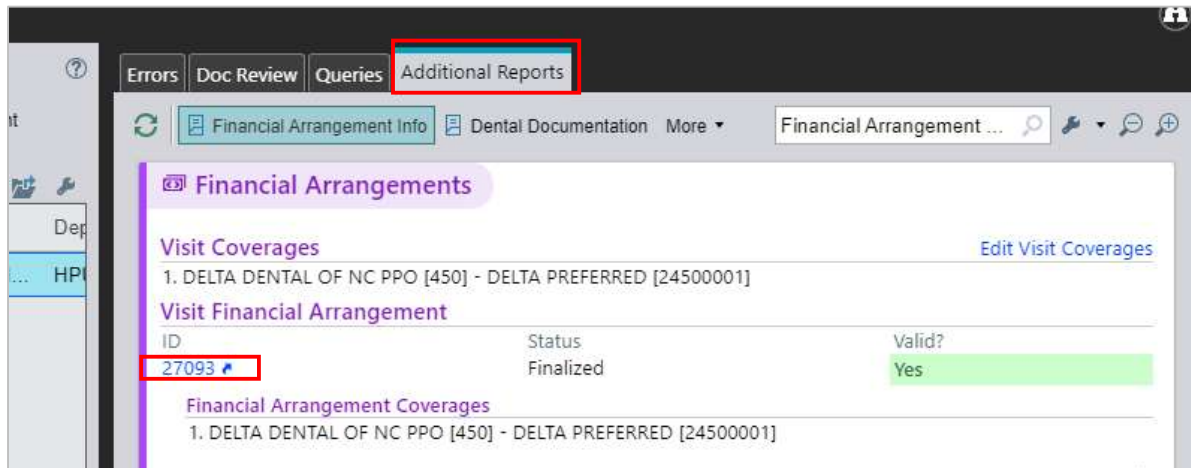
When a patient begins orthodontic treatment, a self-pay charging plan will need to be created to schedule charges for the patient's monthly balance as well as generate A/R for the practice.

The system will automatically zero-out the self-pay balance for the Banding Code and Aligner Fee.

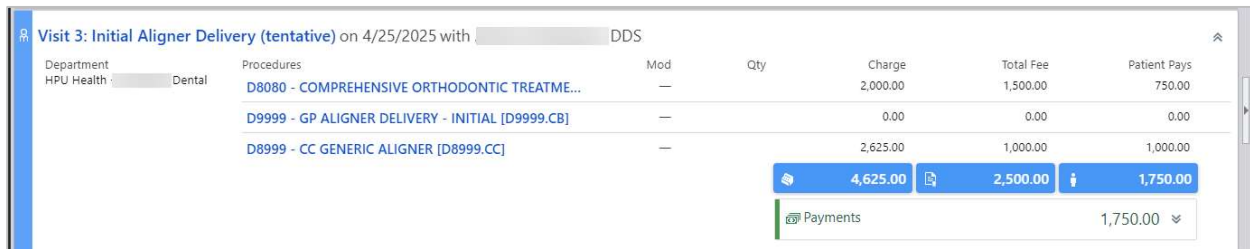
1. Starting from the  Workqueue List, go to the Charge Review Workqueue.
2. Find and double-click the HPU Orthodontic Charge Review Workqueue.
3. Select the account and review the error message in the sidebar:




4. Navigate to Additional Reports > Finalized Visit Financial Arrangement:



5. Review the treatment estimate and take note of the treatment estimate total and review the coverage(s) attached to the treatment estimate. Review the Self-Pay Amounts for the Orthodontic Treatment and Aligners.





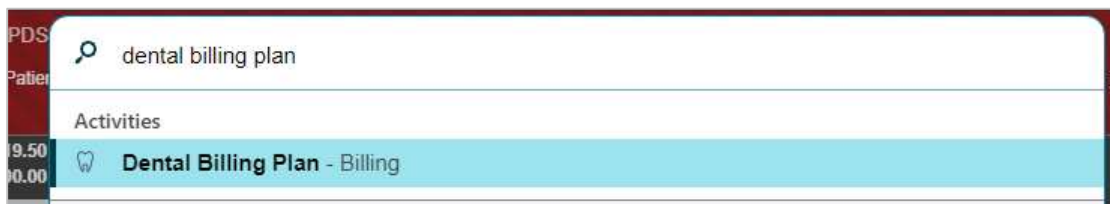
| Department | Procedures | Mod | Qty | Charge | Total Fee | Patient Pays |
|---------------------|--|-----|-----|-----------------|-----------------|-----------------|
| HPU Health - Dental | D8080 - COMPREHENSIVE ORTHODONTIC TREATME... | — | | 2,000.00 | 1,500.00 | 750.00 |
| | D9999 - GP ALIGNER DELIVERY - INITIAL [D9999.CB] | — | | 0.00 | 0.00 | 0.00 |
| | D8999 - CC GENERIC ALIGNER [D8999.CC] | — | | 2,625.00 | 1,000.00 | 1,000.00 |
| | | | | 4,625.00 | 2,500.00 | 1,750.00 |
| | | | | Payments | | 1,750.00 |

NOTE: You can use the  **Expand All button** to expand the procedures to view the breakdown of the total amount.



It is important to review the finalized treatment estimate as this is the signed contract that the patient signed and agreed to treatment. In addition, it will show you the total amount for both insurance and patient portions for the entire treatment.

6. Next, you need to review if there are any payments or credits on the account. Click  **Go To** on the bottom left of the screen and select  **Guarantor Account** to navigate to the patient's Orthodontic Guarantor Account.
7. You will need to create a patient charging plan for the initial and periodic charges.
8. To create the self-pay charging plan, use the search bar in the top middle of the screen, and type "Dental Billing Plan".



When creating a charging plan, make sure to be in the correct department that the Orthodontic Guarantor account is in.

9. Type in either the patient's name or MRN and click **Find Patient** and click **Select**.
 - a. You can take note of the patient's MRN from the guarantor's storyboard in the bottom left of the screen.

10. From the Dental Billing Plan Selection screen, if there are existing charging plans the description will tell you if it is an insurance or self-pay charging plan.



Note: the system will automatically create the insurance charging plan separately in a background process.

11. To set up a self-pay charging plan, click **+ Create**.

12. Enter the information in the following fields:

The screenshot shows a 'Dental Billing Plan' form with the following fields and annotations:

- A**: Description field containing 'Orthodontic Treatment Plan'.
- B**: 'Orthodontic plan?' toggle set to 'Yes'.
- C**: Guarantor dropdown menu showing 'HPU, PBORTHO [800000110]'.
- D**: Department dropdown menu showing '[810000601]'.
- E**: Billing Provider dropdown menu.

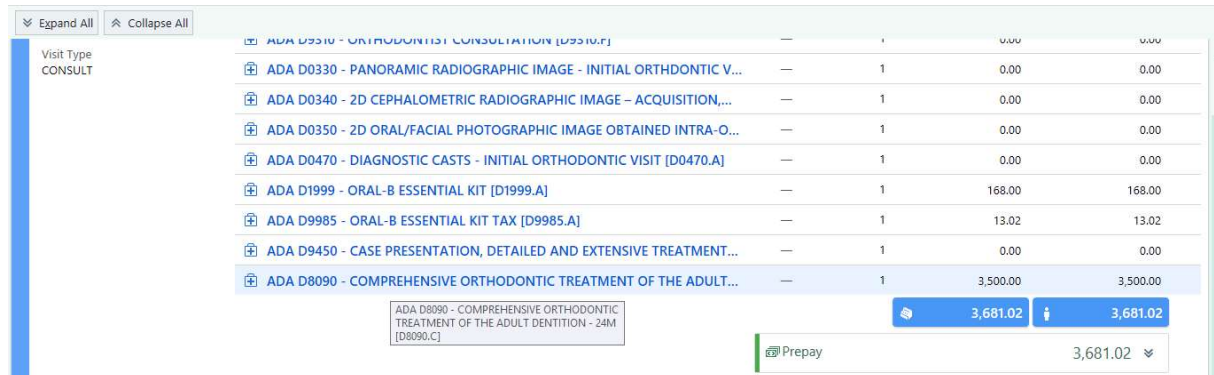
Other visible fields include 'Selected Coverages' (empty), 'Unused Coverages' (listing Delta Dental of NC PPO - Dental, Delta Preferred, Aetna Commercial, and Aetna PPO), and 'Pricing Contract' (empty). The form has 'Accept' and 'Cancel' buttons at the bottom.

- Description: Enter in a detailed description of the type of charging plan you are creating.
- Orthodontic Plan: Select Yes.
- Guarantor: Select the **Orthodontic Guarantor Account**.
- Department: Ensure that the Department field describes the office that you are creating the charging plan for as you cannot create a charging plan for a department that you are not logged into. If it is incorrect, you may need to log into the correct service area.
 - For example: Select Modern Dentistry GP.
- Provider: Ensure that it denotes the correct provider rendering the treatment.
 - Predetermination Coverage: Leave the field blank.
 - Pricing Contract: Leave the field blank.

13. Click **Accept**.

14. Under the Predetermination section, enter the banding code from the financial arrangement.

- The banding code should reflect the correct months of treatment diagnosed.
- If you still have your financial arrangement tab open, navigate to the treatment estimate and click **Expand All** to locate the correct procedure code and hover over the type of treatment.



| Procedure Code | Description | Units | Fee | Total |
|----------------|---|-------|-----------------|-----------------|
| ADA D9310 | ORTHODONTIST CONSULTATION [D9310.C] | 1 | 0.00 | 0.00 |
| ADA D0330 | PANORAMIC RADIOGRAPHIC IMAGE - INITIAL ORTHODONTIC V... | 1 | 0.00 | 0.00 |
| ADA D0340 | 2D CEPHALOMETRIC RADIOGRAPHIC IMAGE - ACQUISITION,... | 1 | 0.00 | 0.00 |
| ADA D0350 | 2D ORAL/FACIAL PHOTOGRAPHIC IMAGE OBTAINED INTRA-O... | 1 | 0.00 | 0.00 |
| ADA D0470 | DIAGNOSTIC CASTS - INITIAL ORTHODONTIC VISIT [D0470.A] | 1 | 0.00 | 0.00 |
| ADA D1999 | ORAL-B ESSENTIAL KIT [D1999.A] | 1 | 168.00 | 168.00 |
| ADA D9985 | ORAL-B ESSENTIAL KIT TAX [D9985.A] | 1 | 13.02 | 13.02 |
| ADA D9450 | CASE PRESENTATION, DETAILED AND EXTENSIVE TREATMENT... | 1 | 0.00 | 0.00 |
| ADA D8090 | COMPREHENSIVE ORTHODONTIC TREATMENT OF THE ADULT... | 1 | 3,500.00 | 3,500.00 |
| | | | 3,681.02 | 3,681.02 |

15. In the Amount field, the final amount should be the fee for the Banding Code and Aligner.



Dental Billing Plan - Pending

Patient Charging Plan [2382] Pending

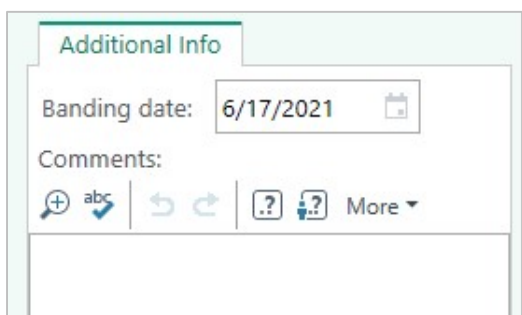
Patient: Cleary, Michelle [216179] | Guarantor: Cleary, Michelle [700000270] | Predetermination Coverage: — | Department: MODERN DENTISTRY ORTHO [10... | Provider: Dee Band, DDS [1000005] | Pricing Contract: —

Predetermination

Charges
3,750.00

| Code | Description | Modifiers | Qty | Teeth | Surfaces | Arch | Quadrant | Area | Super? | Amount |
|---------|--|-----------|-----|-------|----------|------|----------|------|--------|----------|
| D8090.C | COMPREHENSIVE ORTHODONTIC TREATMENT OF TH... | | 1 | | | | | | | 3,750.00 |

16. Next, enter the banding date under Additional Info to the top right of the screen. You can find the banding date by looking at the service date on the banding charge.



Additional Info

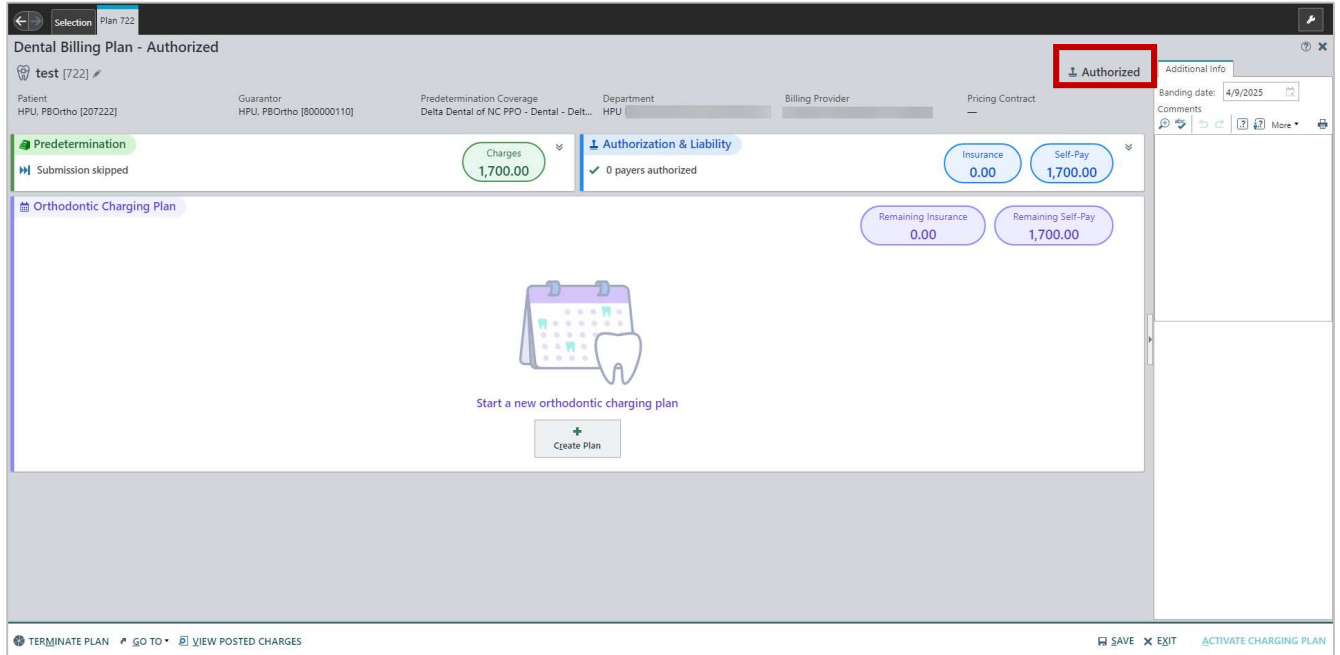
Banding date: 6/17/2021

Comments:

17. Click **Skip Submission**.

- If asked “Are you sure you want to skip submitting a predetermination claim?” click **Retain Amounts and Skip**.

18. Now you can see that the status of the charging plan has automatically updated to “Authorized” in the top right corner.



Dental Billing Plan - Authorized

test [722]

Patient: HPU, PBOrtho [207222] | Guarantor: HPU, PBOrtho [800000110] | Predetermination Coverage: Delta Dental of NC PPO - Dental - Delt... | Department: HPU | Billing Provider: | Pricing Contract: |

Authorized

Predetermination: Submission skipped | Charges: 1,700.00 | Authorization & Liability: 0 payers authorized | Insurance: 0.00 | Self-Pay: 1,700.00

Remaining Insurance: 0.00 | Remaining Self-Pay: 1,700.00

Orthodontic Charging Plan

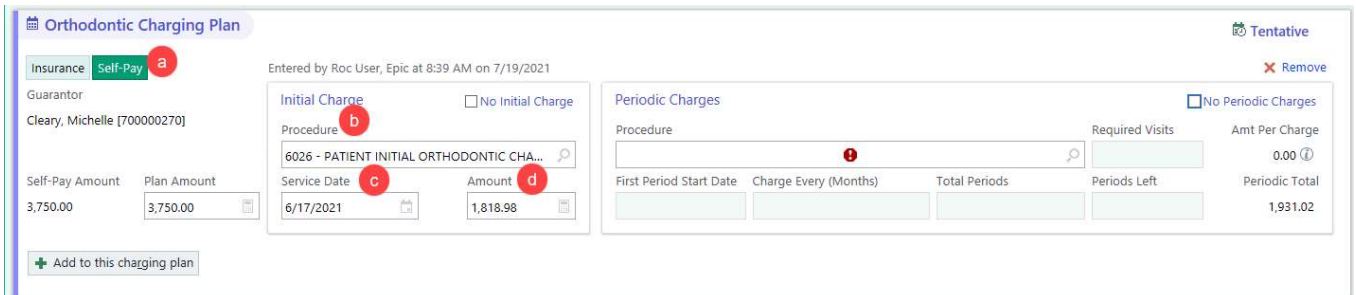
Start a new orthodontic charging plan

[Create Plan](#)

TERMINATE PLAN | GO TO | VIEW POSTED CHARGES | SAVE | EXIT | ACTIVATE CHARGING PLAN

19. Click **+ Create Plan**.

20. In the Orthodontic Charging Plan section complete the following fields:



Orthodontic Charging Plan

Insurance | Self-Pay **a**

Guarantor: Cleary, Michelle [700000270]

Self-Pay Amount: 3,750.00 | Plan Amount: 3,750.00

Entered by Roc User, Epic at 8:39 AM on 7/19/2021

Initial Charge ☐ No Initial Charge

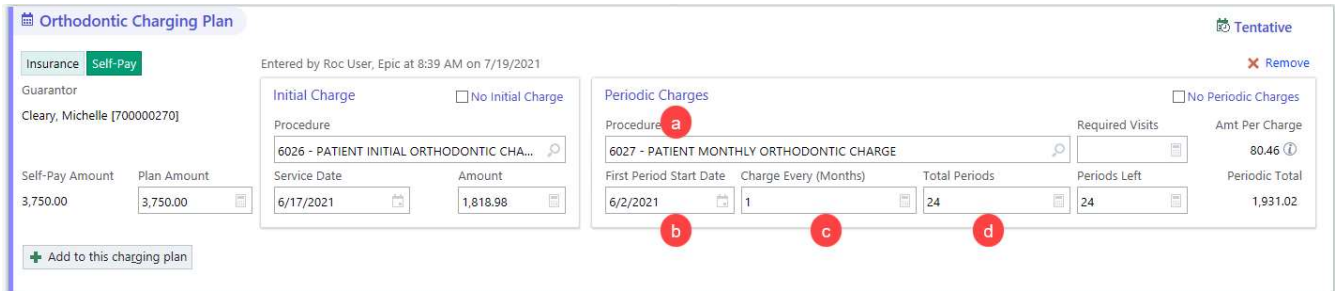
Procedure **b**: 6026 - PATIENT INITIAL ORTHODONTIC CHA...
Service Date **c**: 6/17/2021 | Amount **d**: 1,818.98

Periodic Charges ☐ No Periodic Charges

Procedure: | Required Visits: | Amt Per Charge: 0.00
First Period Start Date: | Charge Every (Months): | Total Periods: | Periods Left: | Periodic Total: 1,931.02

[Add to this charging plan](#)

- Make sure **Self-Pay** is selected.
 - Initial Charge Procedure: Enter **6026- Patient Initial Orthodontic Charge**.
 - Service Date: Enter the patient’s start date.
 - Amount: The amount should be any amount the patient made as an initial payment that has not already been applied to records and x-rays.
21. Next, In the Periodic Charge section complete the following fields:

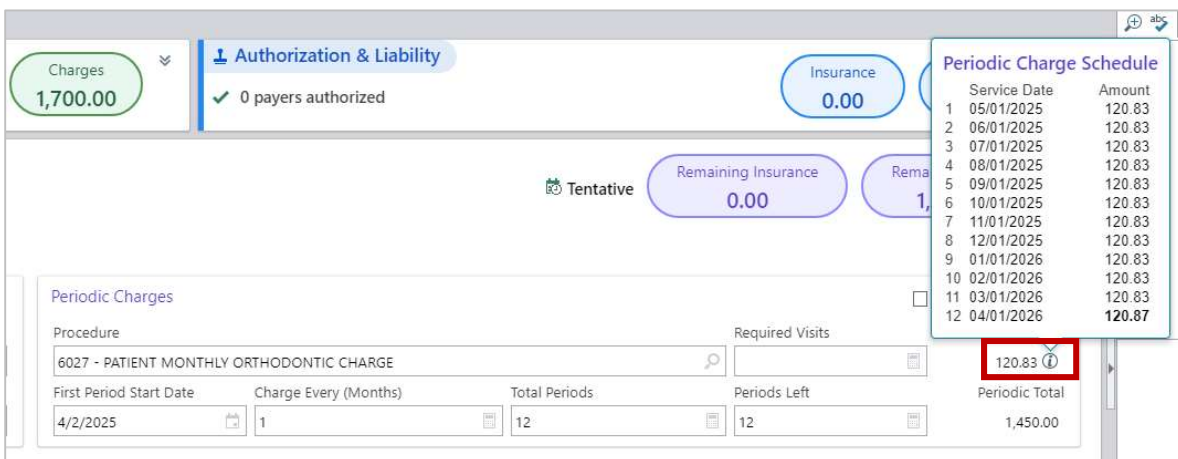


- Periodic Charge Procedure: Enter 6027-Patient Monthly Orthodontic Charge.
- First Period Start Date: minus the 1st month of the first payment that is supposed to come out + 1 day.
 - For example: If the patient was making a payment on the 1st of every month and May 1st was their first payment, enter 04/02/2025.
- Charge Every (Months): Enter a "1" to drop charges monthly.
- Total Periods: Enter the total number of months of treatment.


! Do NOT fill out the Required Visits field.





Helpful tip: click on the information button next to amount per charge to validate the charging plan schedule before activating.



| Service Date | Amount |
|---------------|--------|
| 1 05/01/2025 | 120.83 |
| 2 06/01/2025 | 120.83 |
| 3 07/01/2025 | 120.83 |
| 4 08/01/2025 | 120.83 |
| 5 09/01/2025 | 120.83 |
| 6 10/01/2025 | 120.83 |
| 7 11/01/2025 | 120.83 |
| 8 12/01/2025 | 120.83 |
| 9 01/01/2026 | 120.83 |
| 10 02/01/2026 | 120.83 |
| 11 03/01/2026 | 120.83 |
| 12 04/01/2026 | 120.87 |

- Click  **Activate Charging Plan**.
- Navigate back to the HPU Orthodontic Charge Review workqueue.
- Select the patient and click **Resubmit** to submit the charging plan.

25. If you want to make sure the charges posted to the account, click  **View Posted Charges**.

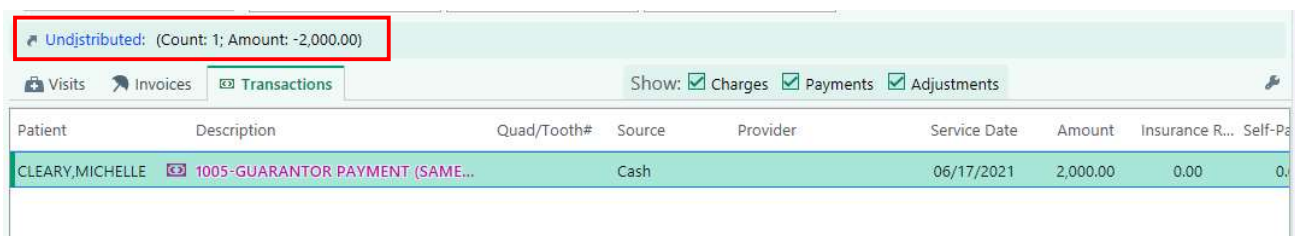
This will take you directly to  **Prof Tx Inquiry**. Click  **Transactions** to view the posted charge(s).




Periodic charges will post overnight.

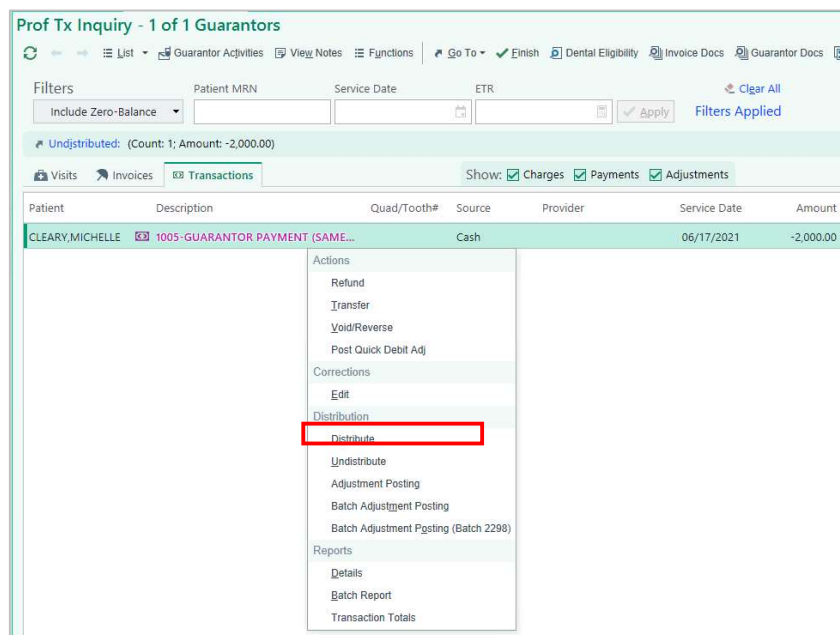
Distribute the Charges to Absorb the Initial Payment

1. Click the Undistributed blue hyperlink.



| Patient | Description | Quad/Tooth# | Source | Provider | Service Date | Amount | Insurance R... | Self-Pay |
|------------------|---|-------------|--------|----------|--------------|----------|----------------|----------|
| CLEARY, MICHELLE |  1005-GUARANTOR PAYMENT (SAME... | | Cash | | 06/17/2021 | 2,000.00 | 0.00 | 0.00 |

2. Right-click on the Guarantor Payment (in purple) and select Distribute.




Prof Tx Inquiry - 1 of 1 Guarantors

Filters: Patient MRN, Service Date, ETR, Include Zero-Balance, Apply, Clear All, Filters Applied

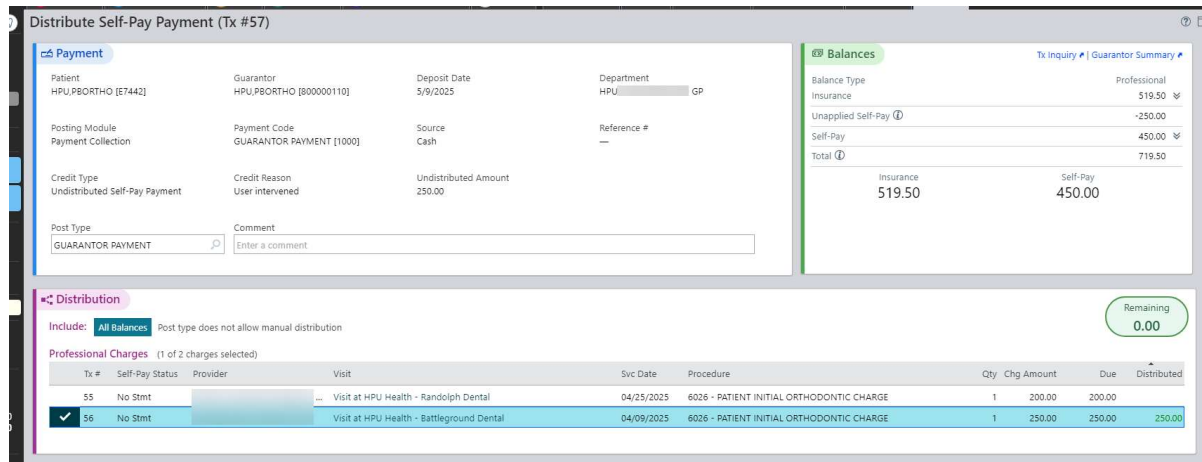
Undistributed: (Count: 1; Amount: -2,000.00)

Visits, Invoices, Transactions, Show: Charges, Payments, Adjustments

| Patient | Description | Quad/Tooth# | Source | Provider | Service Date | Amount |
|------------------|---|-------------|--------|----------|--------------|-----------|
| CLEARY, MICHELLE |  1005-GUARANTOR PAYMENT (SAME... | | Cash | | 06/17/2021 | -2,000.00 |

- Actions
 - Refund
 - Transfer
 - Void/Reverse
 - Post Quick Debit Adj
- Corrections
 - Edit
 - Distribute
 - Undistribute
 - Adjustment Posting
 - Batch Adjustment Posting
 - Batch Adjustment Posting (Batch 2298)
- Reports
 - Details
 - Batch Report
 - Transaction Totals

3. Distribute the Guarantor Payment to the Initial Charge.

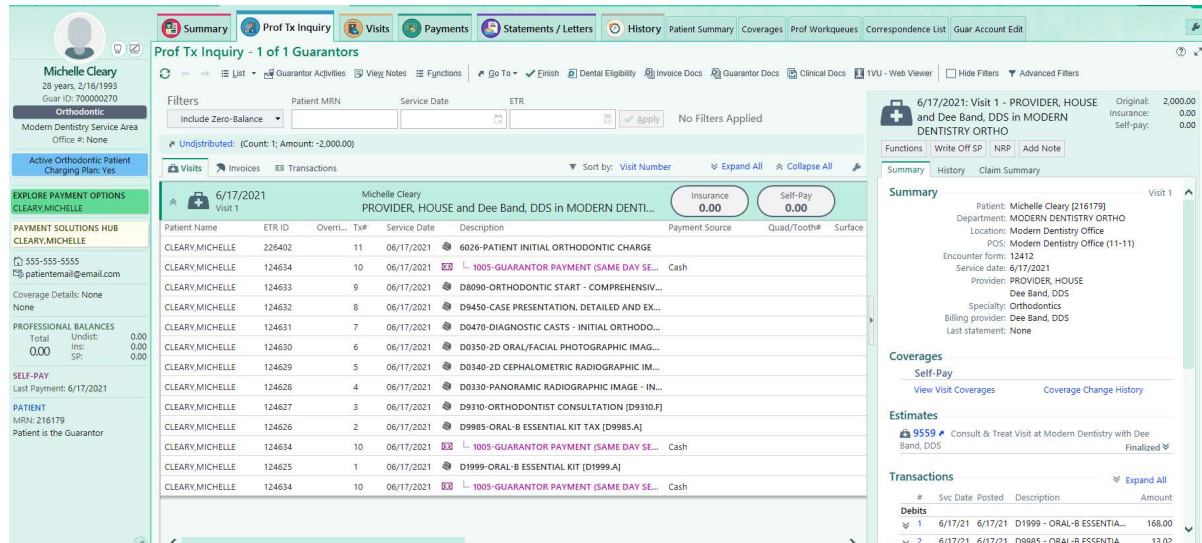


4. Click Accept.

5. Go to the Visits tab with Prof Tx Inquiry to see the payment distribution.

a. Click Clear all Filters.

b. If you don't see the payment distribute right away, click Refresh.



6. Once the self-pay charging plan has been created, you can navigate back to the Charge Review > HPU Orthodontic Charge Review workqueue.

7. Select the account you just created the charging plan for and click Resubmit.

NOTE: If asked “Are you sure you want to resubmit the session?”, click Resubmit.

8. The account will fall off your workqueue list and you can move on to the next account.

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