BILLING DUTIES GUIDE

BEFORE STARTING BILLING, PLEASE READ ON THE PORTAL THE FOLLOWING:

- Billing and Collections Policy

COMPLETE THE FOLLOWING REPORTS ON THE 1ST -5TH OF EACH MONTH BEFORE BILLING:

- Claims Not Sent
- Procedures Not Billed To Insurance
- Choose Dentist
- Declined Patient Payments

THEN, MAKE SURE NEXT STEPS ARE FINISHED:

- Membership Plan renewal letters and auto set up must be done
- All Fast Track accounts resolved
- All collection accounts sent to Collections

STEB BY STEP GUIDE:

Under the Manage tab (Where you clock in/out) there is a button on the left side of screen labeled "BILLING". Click that tab. If there is a small list of bills that pop up, click "close" and then select the option "yes" to delete all unsent bills. Then click "okay" for the next option notifying you that they have been deleted.

CLICK BILLING TAB AGAIN:

You must ensure all options have been set up before hitting the "Create List" tab:

- Date in the top left of page must reflect 1 day AFTER the last time bills were printed in that office.
- Select all billing types
- Add $20.00 in the amount box
- Select account history date range of 90 Days
- Click Create List

LIST WILL PRINT IN ALPHABETICAL ORDER:

- Start at the top of the list and work down
- Open each account to evaluate the balance and where it is coming from (Which family member, what date of service, and why there is a balance)
- Any questions on the balance, Task EOB for that office

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- Once all questions have been answered and you know where the balance is coming from, click on "Commlog" at the top of the page
- Highlight "Monthly Billing Summary" in 1st box, highlight "Mail" in 2nd box, and then "Sent" in the 3rd box at the top of the "Notes" box
- In "Notes", you will type your summary of date of service, who the appointment/balance is for and where the balance is coming.
- IF THE STATEMENT IS A 2ND NOTICE, MENTION THAT, AND THAT A LATE FEE HAS BEEN APPLIED, THEN APPLY THE $30 LATE FEE

Once you have worked the whole list, go back to the "Manage" tab and select "billing". Select all the accounts you are sending a bill to, then click "send". This will load all accounts and get ready to print them. Remember to print on the COLOR printer.

However many Second Notice accounts there are, you need to print a 2nd Notice letter as well. That is located in Files. You can search: "2nd notice letter: in the search bar, and select it when it comes up. Print the number of accounts there are so you have 1 for each late account.

FOLD ALL THE BILLS WITH BILLING INSERTS (IF ANY) AND STAMP ENVELOPE. THEY ARE READY TO BE MAILED.