

Version 12 Insurance Features

627 [TDO KB](#) October 12, 2023 [Program Setup](#), [Site Configuration](#), [TDO software](#) 16.56K
Overview

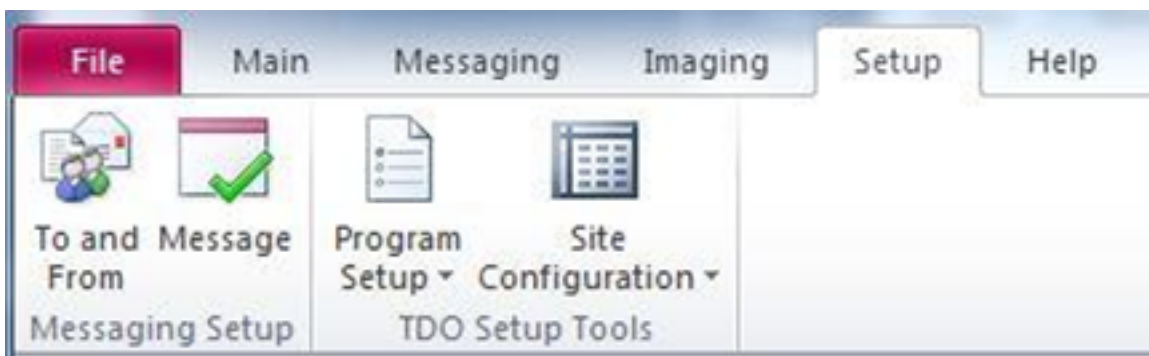
This article contains the step by step instructions on insurance features in Version 12.

Multi Fee Schedule

TDO has the ability for you to setup Multiple Fee Schedules for different insurances that you are in network with or you may want to add in the system for reference. These can also be attached to the corresponding insurance profiles you setup in the system. See Adding an insurance [Here](#) on how to attach a fee schedule to a particular insurance.

To activate Multiple Fee Schedules:

- Go to **Setup**
- Select **Site Configuration** and select **Edit Control Table**



- On the **Application Settings** tab, check the box next to **Enable Multiple Fee Schedules**

Control Table Information

Practice Information
Application Settings
Network Settings
Workstation Settings

Video Files Location

Video Path:

Tooth entries in the appointment history

☒ Show Tooth Entries

Action on mark appointment

as Cancelled / No Show / Rescheduled:

Move appointments to column:

Letter Module Properties

Letters Editor:

Letters Format: ☒ Send PDF

SOAP NoteTmpt:

☒ Attach original image on email

Automatic Financial Tickler

Insurance Auto Fin. Tickler Delay (days):

Non-Insurance Auto Fin. Tickler Delay (days):

☐ Enable Ins. Financial Tickler Pop-ups

☐ Enable Non-Ins. Financial Tickler Pop-ups

☒ Automatically Update Future Dates

Insurance

Delta Claim ID:

☒ Insurance Estimating ☐ Default to Non-Assigned

☐ New patient default to NO insurance

Index Name Caption

Singular form: Plural form:

Message Viewer

☒ Run Messenger at Startup

Phone/Fax

Phone Prefix:

International

Culture:

☐ Disable State Autofill

Insurance Form:

Medical History

Type: Lang. Short:

☒ Show Pref. Language on Patient Chart

☒ Enable allergy pop-up in prescription form

Diagnosis Form

Default Form Size:

Multiple Fee

☒ Enable Multiple Fee Schedules

SMS Options

☒ Allow Staff group to send SMS

☒ Check Send SMS automatically

Miscellaneous Settings

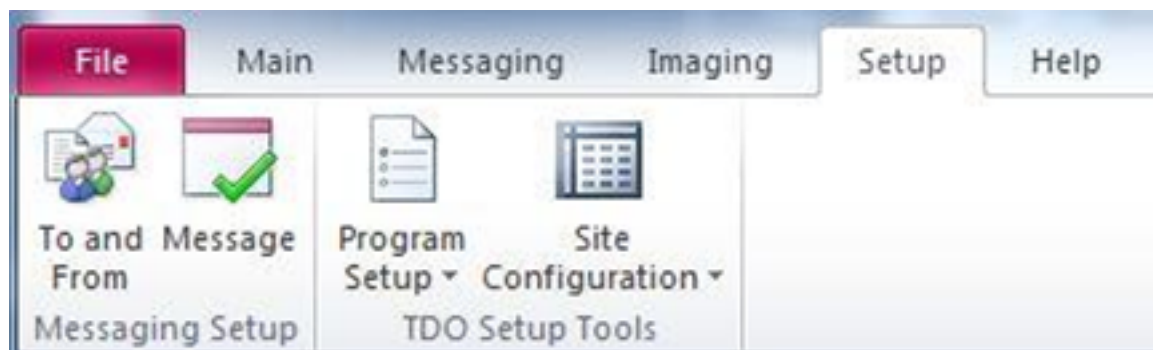
☒ Enable Procedure and Teeth Association ☒ Lock Manual Notes after:

☐ Display SSN and DOB on Ledger and Statement

Record: 1 of 2 No Filter Search

To add a new Multi Fee Schedule:

- Go to **Setup** and select **Program Setup**



- Select the **Fees listing/ADA codes** option

The Digital Office, Program Version: Release 121 - TDO

File Main Messaging Imaging Setup Help

To and Message From: Messaging Setup

Program Setup Configuration

Alert Setup Options

Anesthesia

Antibiotic Types

Appointment Setup

Auto-Correct Options

Calendar

Canadian Claim Workstations

Custom Macro Notes Options

Custom Macro Appt Notes Options

Default Probing Options

Default Tooth Canal Sequence

Doctors Bank Information

Evaluation

Explosion Codes Options

Fee Adjustment Setup

Fees Listing/ADA Codes

Final Report Macro Notes

Format String

Formatting

Image Categories

Main Page Order

Multi Tooth

Payer ID/EDI

Notes to Front Options

Operator Names

Pharmacies

Policy/Comment

Practice Management

Printed Autofill Options

Prescription Autofill Options

Pre-Treatment Estimate Note

Once you have pasted the patient's clipboard, press the Paste button.

ID: 1933

Chart #:

Preferred Language: English

Remove

User: admin BP.3

to Paste: Click to Paste Post-op Image

Click to Paste Post-op Image

Tooth	Ref Date	Doctor	Comp Date	DI	Recall Date	Report Date
5	8/27/2008	Car	9/29/2008	29	9/29/2008	9/29/2008

Insurance: Medical History Summary Pain History Pain Full Mouth Probing Multi Tooth Info Diagnosis

Notes to Front Letters Prescriptions Recall Notes Surgical Diagnosis Surgical Treatment Eval

George M.D.

Referral by: Shaw, Peter

Gen Dentist: Shaw, Peter

Additional Doctor:

Occupation: Retired

Employer Name:

Employer Address:

Emerg. Contact: patty Padon

Spouse:

Guarantor:

Legal Guardian:

Other Contact:

Email Home: ggnottap@hotmail.com

Email Work:

Insurance Note: ATA Signa

Web ID: GPadon Generate

Web Password: ***** Web Login Show

Correspondence via: Fax Email (H) Email (W)

There are Referring Doctor Notes

ent will call to set up appointment Outcome Case

d to call patient to set up appointment Lecture Export

but Schedule DHETA Board Implant

ended

Needs Updating Ref Dr: Dr. Peter Shaw IP: 6152972954 Gen Dr: Dr. Peter Shaw... Multi Lock Powered by Microsoft Access

- Click on **New Multi Fee**
- Click on **New**

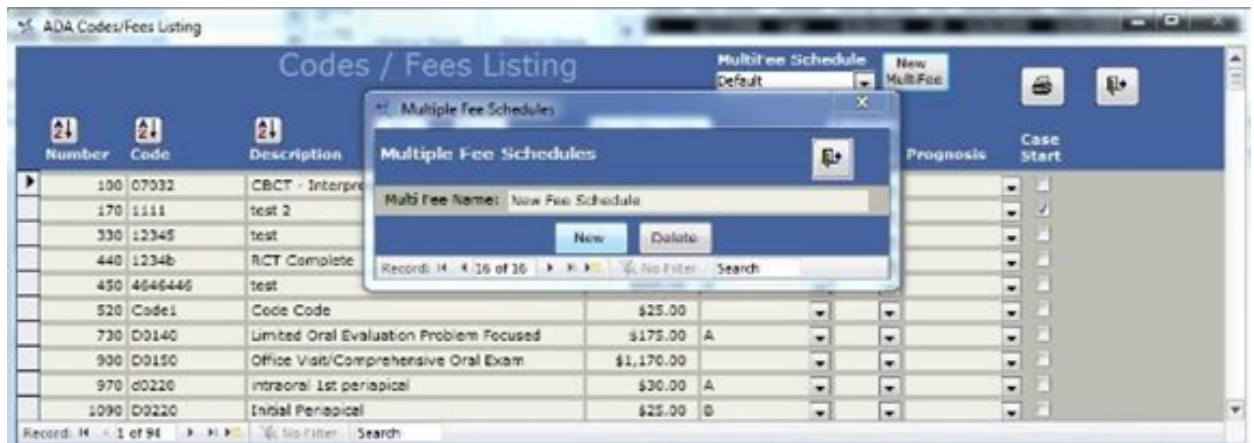
ADA Codes/Fees Listing

Codes / Fees Listing

MultiFee Schedule: Default New MultiFee

Number Code Description Up Down Save this order Estimate Number of Visits Prognosis Case Start

- Name the New Multi Fee

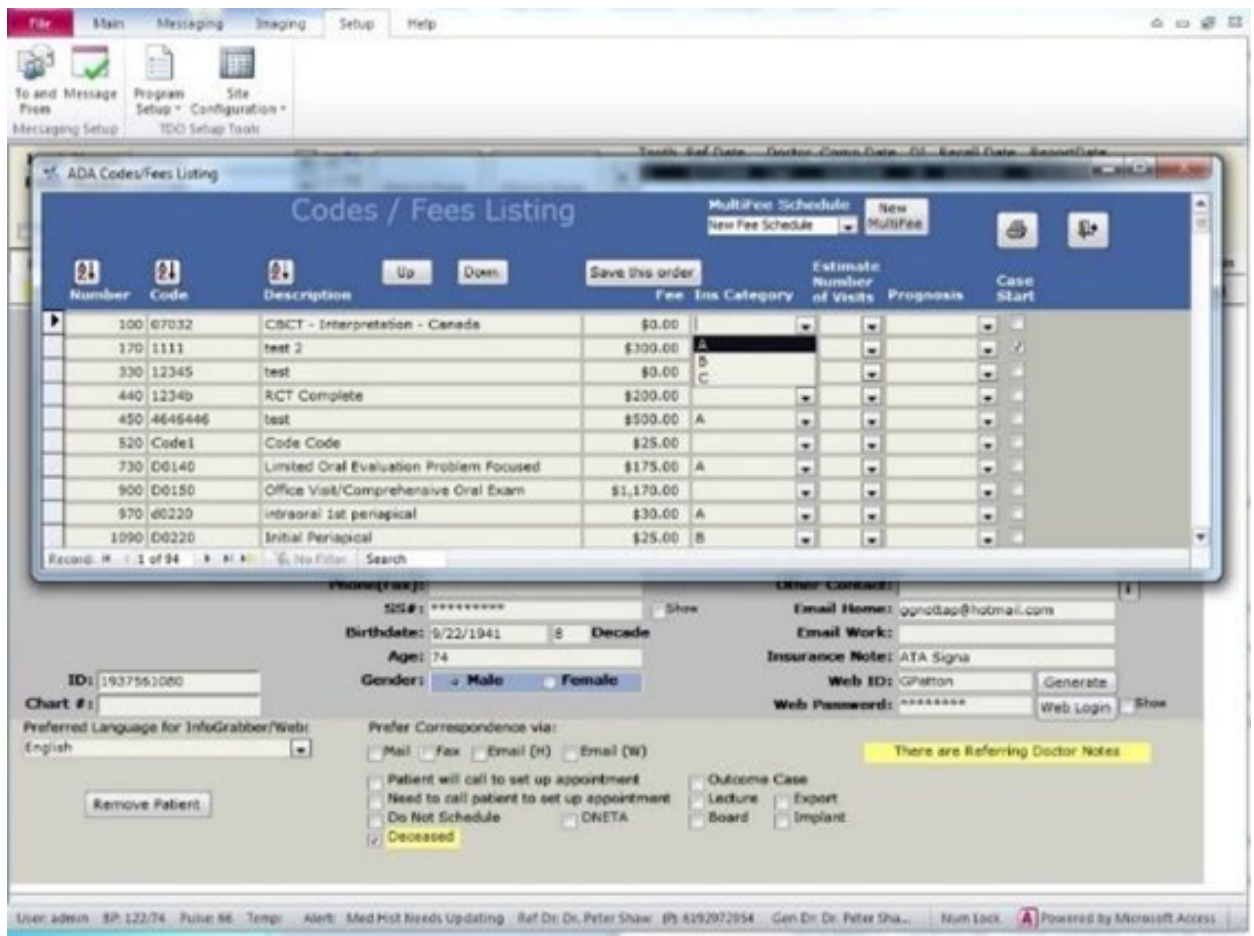


- List fees as either A/B/C under the **Fee Category** drop down.

Type A correlates to Preventative

Type B correlates to Standard (Basic Coverage)

Type C correlates to other (Major coverage).



Turn on Insurance Estimating

NOTE:

The insurance estimating feature is best used for practices who are in network with insurance or wish to show the UCR Fee on their claims. If neither of these conditions applies to you, you may wish to leave Insurance Estimating turned off.

TDO has the ability to calculate contracted insurances and automatically write off in network adjustments giving you the ability to bill the insurance with your UCR fee.

- Go to **Setup** and select **Site Configuration**
- Select **Edit Control Table** and open the **Application Settings** tab.
- Under the **Insurance** area, check mark the box next to **Insurance estimating**
- It will prompt you to log off and log back in to take effect.

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How to add a new insurance

For instructions on how to add a new insurance. Click [Here](#)

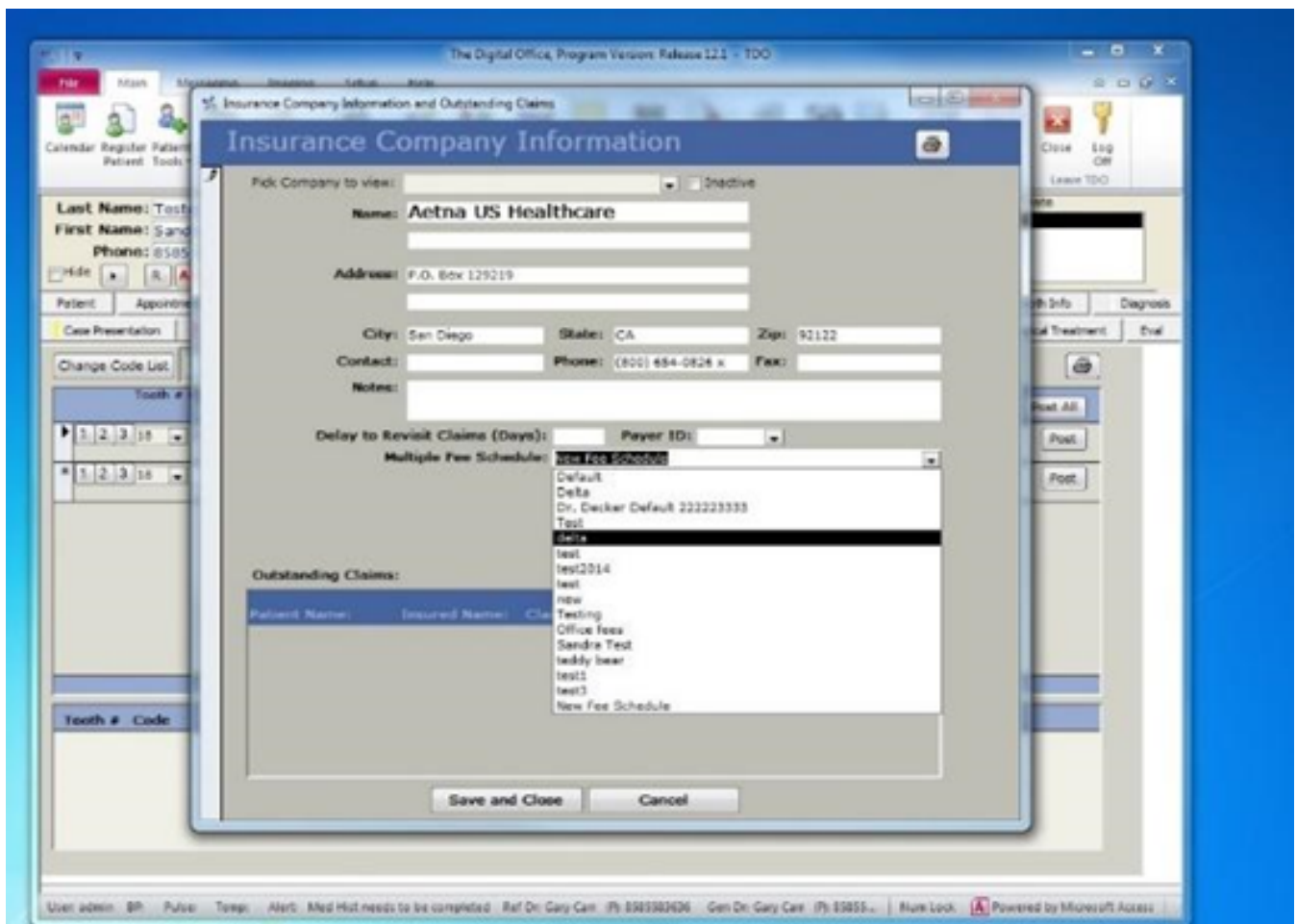
How to attach a Fee Schedule to an Insurance

After setting up your multi fee schedules you can attach them to an insurance in the system so that it automatically pulls the correct fee schedule corresponding to the insurance chosen under the insurance tab.

- Go to **Insurance Tools** drop down along the upper bar then click on **View/Edit Insurance Co. Information**.



- Attach the **Multi Fee Schedule** that corresponds to the insurance company you select in the **Pick Company To View** drop down.



- If you are a participating provider check the box next to **Participating- Automatic Write Off**
- Add Adjustment Category for example *"Delta Dental Participating Write Off"* by right clicking on the drop-down arrow and choosing **Edit List**.

Insurance Company Information and Outstanding Claims

Insurance Company Information

Pick Company to view: ☐ Inactive

Name:

Address:

City: **State:** **Zip:**

Contact: **Phone:** **Fax:**

Notes:

Delay to Revisit Claims (Days): **Payer ID:**

Multiple Fee Schedule:

Participating-Automatic Write Off: ☒ **Adjustment Category:**

Update Payment Table: ☐

Outstanding Claims:

Patient Name:	Insured Name:	Claim #:	Date Sent:	Date Received:	Type:	View Claim:

- **Save and Close** once finished

How to use Insurance Estimating for Participating Providers Using the Multi Fee Schedule

If you are a participating provider for an insurance company, you can set up a coverage table to calculate insurance based on your participating fees and still be able to bill the insurance with your UCR fees.

- Turn on insurance estimating under Setup - Site configuration - Edit Control Table - Application Settings - Insurance - Check the box for insurance estimating.
- Go to Patient- Insurance tab- choose insurance from drop down and add it to the patient's insurance tab.

- Click on Coverage Table

The screenshot shows the 'The Digital Office, Program Version: Release 12.1 - TDO' window. The 'Insurance' tab is selected, and the 'Coverage Table' button is highlighted. The 'Main Data' section shows patient information: Last Name: Tester, First Name: Sandra, Phone: 8585583696. The 'Insurance' section shows 'Carrier: Tester Insurance' and 'Patient Ins ID:'. The 'Subscriber' section shows 'First Name: Sandra', 'Last Name: Tester', 'Gender: M', 'Address: 1234 Main St', 'City: San Diego', 'State: CA', 'Zip: 92126', 'Phone: (858) 558-3696 x', 'Employer: Knottsberry Farm', and 'Group #: 4321'. The 'Benefits' section shows 'Changed Date: 6/30/2016', 'Max Benefits: \$1,500.00', 'Benefits left: \$1,425.00', and 'Deductible Left' with 'Standard: \$50.00', 'Preventive: \$50.00', and 'Other: \$50.00'. The 'Summary of all claims submitted for this patient for this insurance company:' table is empty. The status bar at the bottom shows 'User: admin', 'BP: Pulse: Temp: Alert: Med Hist needs to be completed', 'Ref Dr: Gary Carr (P): 8585583636', 'Gen Dr: Gary Carr (P): 85855...', 'Num Lock', and 'Powered by Microsoft Access'.

- Enter in percentages for categories standard/preventive/other and click on update. These categories correspond to the A/B/C categories set up in the Fee Schedules respectively. A profile will be created with the Employer and Group number. The next time a patient comes in with the same Employer and group number you will be able to choose from the profile drop down. For more information on how Profiles work click [Here](#).

Knottsberry Farm

Coverage Table

Update Coverage
 Standard: % Preventive: % Other: % Update

Code	Description	Fee	Type	Cov(%)	Cov(\$)	Deduct Type
07032	CBCT - Interpretation - Canada	\$0.00	%	0		
1111	test 2	\$300.00	%	80		Standard
12345	test	\$0.00	%	100		Prevent
1234b	RCT Complete	\$200.00	%	0		
4646446	test	\$500.00	%	80		Standard
Code1	Code Code	\$25.00	%	0		
D0140	Limited Oral Evaluation Problem Focused	\$175.00	%	80		Standard
D0150	Office Visit/Comprehensive Oral Exam	\$1,170.00	%	0		
D0220	Initial Periapical	\$25.00	%	100		Prevent
d0220	intraoral 1st periapical	\$30.00	%	80		Standard
D0221	Additional Periapical	\$300.74	%	100		Prevent
d0230	intraoral additional periapical	\$15.00	%	80		Standard
D0230	Addtnl Periapical	\$30.00	%	0		
d0270	bitewing single image	\$35.00	%	80		Standard
D0330	Panoramic Film/Scan	\$90.00	%	0		
D0362	Two Dimensional Reconstruction CT	\$0.00	%	0		
D0363	Three Dimensional Reconstruction CT	\$0.00	%	0		
D0364	Cone Beam CT Scan	\$375.00	%	0		
D0415	Culture	\$150.00	%	0		
D0501	Histopthy Exam	\$150.00	%	0		
D1212	test	\$0.00	%	0		
D2160	Amalgam three surface	\$10.00	%	100		Prevent
D2161	amalgam	\$10.00	%	80		Standard

Record: 1 of 93 No Filter Search

- Go to **Fees**.
- Add in Ada Code.
- Original fee or your fee for service will be added, the contracted fee, the insurance estimate, and the patient portion based on what you entered in the coverage table.

Patient		Appointments		Fees		Ledger		Insurance		Medical History Summary		Pain History		Pain		Full Mouth Probing		Multi Tooth Info		Diagnosis	
Case Presentation		Treatment		Final Report		Notes to Front		Letters		Prescriptions		Recall		Notes		Surgical Diagnosis		Surgical Treatment		Eval	
Change Code List Enter Explosion Codes MultiFee: Sandra Test Calc. Insurance New Claim Fin. Tickler																					
Tooth #	Code	Surface	Description	Original Fee	Fee No Charge	Ins. Est.	Deductible	Pt Est.	Fee Presented	Dr.	Post All										
1 2 3 18	D3330		Molar RCT	\$1,800.00	\$1,200.00	\$910.00	\$50.00	\$290.00	A	Bond	Post										
10 hello2											Post										
1 2 3 18											Post										

- Once posted the write off amount between the fee for service and the contracted fee will be automatically adjusted off.

How to calculate insurance without using Insurance Estimating:

Please click [here](#) to calculate insurance without using Insurance estimating.

Online URL: <https://kb.tdo4endo.com/article.php?id=627>