

How to calculate insurance WITHOUT using Insurance Estimating

738 [TDO KB](#) October 11, 2023 [Program Setup](#), [Site Configuration](#), [TDO software](#) 11.46K

How to calculate insurance without using Insurance Estimating:

There is the option to not use the Insurance Estimating feature. Users will still be able to calculate insurance by assigning categories but you will not be able to create specific coverage tables.

Before continuing, it is very important to determine how you want the fee amount to show in the Ledger and in the Insurance Claims.

If you want to show the UCR amount, please follow the instructions on how to enable Insurance Estimating [here](#). If you want the Insurance fee amount to show in the Ledger, please follow instructions below.

Initial Configuration

Make sure the **Insurance Estimating** box in Edit Control table is **unchecked**. To access this checkbox, go to **Setup>Site Configuration>Edit Control Table>Application Settings** tab.

Control Table Information

Practice Information Application Settings Network Settings Workstation Settings

Video Files Location

Video Path:
c:\vidTest

Tooth entries in the appointment history

☐ Show Tooth Entries

Action on mark appointment

as Cancelled / No Show / Rescheduled:
Move appointments to column: 5

Letter Module Properties

Letters Editor: MS Word Reports...
Letters Format: MS Word (DocX) ☒ Send PDF

SOAP NoteTmp:
☐ Attach original image on email

Email Rpt to Authorized Dr Setup PDF Email Setup
Email Rpt to Authorized Pat. Setup

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
☐ Disable Insurance Comparison

Index Name Caption

Singular form: Plural form:
Tooth # Teeth

Message Viewer

☐ Run Messenger at Startup

Phone/Fax

Phone Prefix:

International

Culture: UNITED STATES
☐ Disable State Autofill
Insurance Form:
US ADA

Medical History

Type: Customizable Lang. Short
Med Hist: English
☐ Show Pref. Language on Patient Chart Customize
☐ Enable allergy pop-up in prescription form

Diagnosis Form

Default Form Size: Long Diagnosis Form

Multiple Fee

☒ Enable Multiple Fee Schedules

SMS Options

☐ Allow Staff group to send SMS
☐ Check Send SMS automatically

Miscellaneous Settings

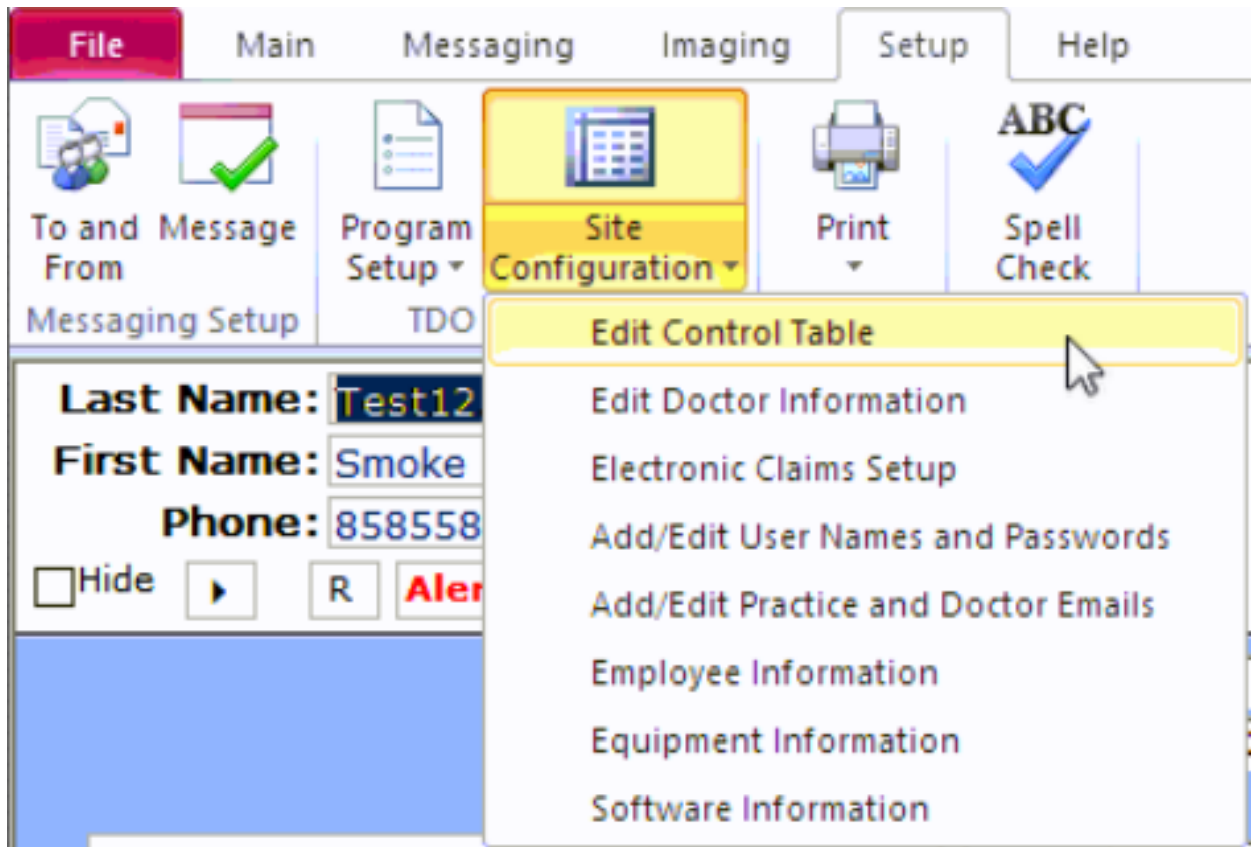
☐ Enable Procedure and Teeth Association ☐ Lock Manual Notes after:
☐ Display SSN and DOB on Ledger and Statement

Google Accounts - Calendar Sync
Integrated Devices

Close

How to **Activate** Multi Fee Schedules:

- Go to **Setup>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
☐ Disable Insurance Comparison

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 Med Hist:
☐ 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

Adding a new Multi Fee Schedule:

Note: if currently using fee schedules, make sure all fees have categories if applied to the specific fee.

- Go to **Setup** and select **Program Setup**, Select the **Fees listing/ADA codes** option.

Messaging

Imaging

Setup



Program
Setup ▾



Site
Configuration ▾



Print
▾



ABO
Spe
Che

Alert Setup Options

Anesthesia ▶

Antibiotic Types

Appointment Setup

AutoCorrect 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 ▶

Notes to Front Options ▶

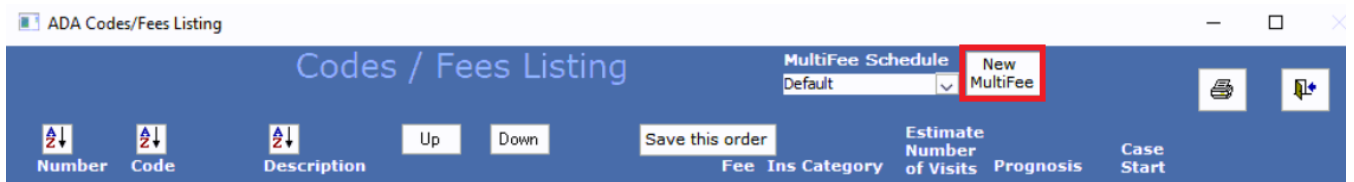
Operatory Names

Payer ID(NEIC)

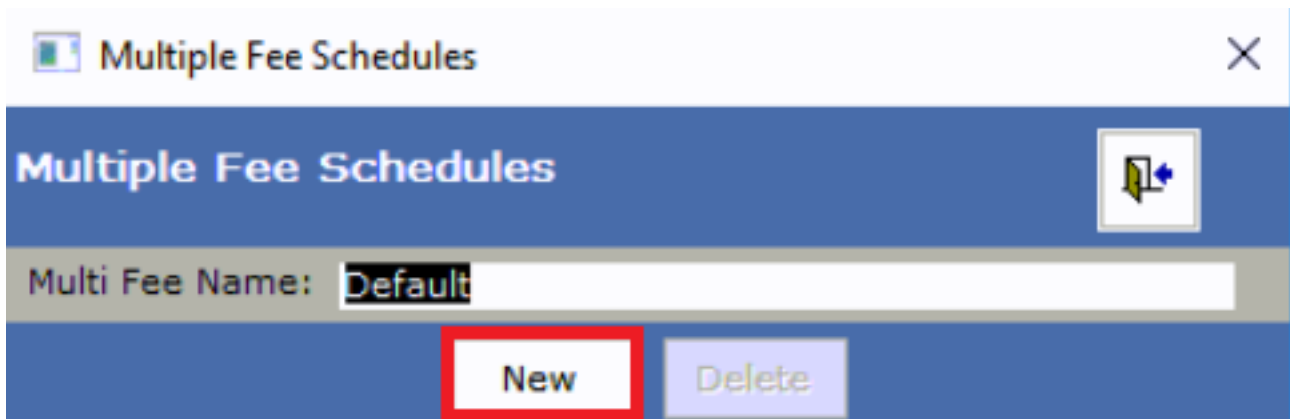
Pharmacies

Policy/Consent ▶

- Click on **New Multi Fee**.



- Click on **New**.



- Name the New Multi Fee.

ADA Codes/Fees Listing

Codes / Fees Listing

MultiFee Schedule: Default
 New MultiFee

Number	Code	Description	Prognosis	Case Start
	D9999	Film/Intraoral, PA		
	D0140	test		
	D0150	Exam Performed		
1	D9310	Spec Consult		
2	D3310	Anterior	\$1,100.00	Prevent (A)
3	D3320	Bicuspid	\$2,200.00	
4	D3330	Molar	\$1,200.00	Prevent (A)
5	D3346	Anterior - Retreatment	\$5,000.00	

Record: 1 of 64 | No Filter | Search

- Click the **Close** button to close the window.

ADA Codes/Fees Listing

Codes / Fees Listing

MultiFee Schedule: Default
 New MultiFee

Number	Code	Description	Prognosis	Case Start
	D9999	Film/Intraoral, PA		
	D0140	test		
	D0150	Exam Performed		
1	D9310	Spec Consult		
2	D3310	Anterior	\$1,100.00	Prevent (A)
3	D3320	Bicuspid	\$2,200.00	
4	D3330	Molar	\$1,200.00	Prevent (A)
5	D3346	Anterior - Retreatment	\$5,000.00	

Record: 1 of 64 | No Filter | Search

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

ADA Codes/Fees Listing

Codes / Fees Listing

MultiFee Schedule New Fee Schedule New MultiFee

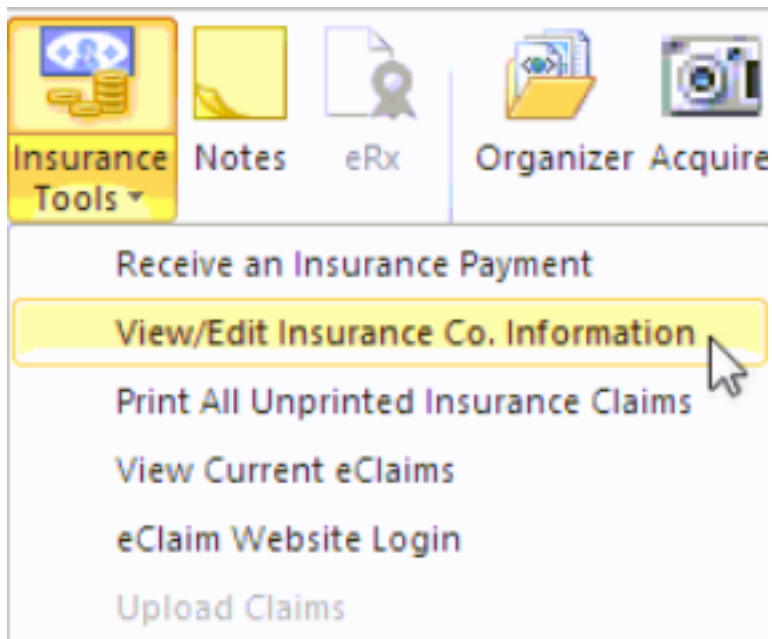
Number Code Description Up Down Save this order Estimate Number of Visits Prognosis Case Start

	D9999	Film/Intraoral, PA, add'l Filmaaa	\$100.00	Standard (B)				
	D0150	Exam Performed BY Specialist	\$75.00					
	D0140	test	\$75.00	Prevent (A) Standard (B) Other (C)				
1	D9310	Spec Consult	\$125.00	Prevent (A)				
2	D3310	Anterior	\$1,100.00	Prevent (A)				
3	D3320	Bicuspid	\$2,200.00					
4	D3330	Molar	\$1,200.00	Prevent (A)	2			
5	D3346	Anterior - Retreatment	\$5,000.00					

Attaching 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.

Insurance Company Information

Pick Company to view:

Name:

Address:

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

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

Notes:

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

Multiple Fee Schedule:

- Default
- Delta
- Metlife
- TESTING
- Principal
- 2019New
- EmployeeTest3
- Aetna**

Outstanding Claims:

Patient Name:	Insured Name:	Claim #:	Date Sent:	Date Received:	Type:	View Claim:
George Clooney	George Clooney	5	4/6/2016		Claim	
John Mayer	John Mayer	20029	3/22/2016		Claim	
Sam Smith		40030	2/10/2015		Claim	
Sam Smith		40031	2/10/2015		Claim	

- **Save and Close** once finished.

- Go to the **Insurance Tab** and locate the boxes for **Categories A/B/C**.

Pick Carrier: Or Profile: ☐ No Insurance

Carrier: ☒ Primary ☐ Secondary

Patient Ins ID: ☐ Inactive ☒ Ins. is locked. It has claims.

Payer ID: Begin: End:

Subscriber: Relationship to Subscriber: ☒ self ☐ spouse ☐ child ☐ other:

Subscriber information

First Name: MI: Birthdate:

Last Name: SS/ID#:

Gender: ☒ M ☐ F

Address:

City: State: Zip:

Phone: Employer: Group #:

Benefits

Changed Date: Non-Duplication of Benefits Clause? ☐

Max Benefits: Benefits left:

Deductible Left

Deduct left: Max Deductible:

Has Deductible been met? ☒ Yes ☐ No

Coverage: A: B: C:

Spoken to:

- Add percentages.

Coverage: A:	100 %	B:	80 %	C:	50 %
Spoken to:					

- These will calculate percentages corresponding to the category chosen in the fee schedule.

Pick Carrier: Or Profile:		☐ No Insurance	View Insurance Company Information	Envelope
Carrier: Aetna	☒ Primary ☐ Secondary	Next Ins. Co		
Patient Ins ID:	☐ Inactive ☒ Ins. is locked. It has claims.	Edit Profile Search Profiles		
Payer ID: 60054	Begin: End:			
Subscriber: Relationship to Subscriber:				
Patient ☒ self ☐ spouse ☐ child ☐ other:				
Subscriber information				
First Name: Joba	MI:	Birthdate: 6/21/1981		
Last Name: Chamberlain		SS/ID#: 123451234		
Gender: ☒ M ☐ F				
Address: 12203 5th Street				
City: New York	State: NY	Zip: 10001		
Phone: (555) 555-7888 x				
Employer: NY Yankees	Group #: 569874			
Benefits				
Changed Date: 3/18/2014	Non-Duplication of Benefits Clause? ☐			
Max Benefits: \$2,000.00	Benefits left: \$2,000.00 RTB			
Deductible Left				
Deduct left: \$0.00	Max Deductible: \$0.00			
Has Deductible been met? ☒ Yes ☐ No				
Coverage: A: 100 % B: 80 % C: 50 %				
Spoken to:				

- Go to **Fees Page**
 - **Note:** if a Multi Fee Schedule is linked to an Insurance company, the name of the Multi Fee will be showing in Multi Fee dropdown. If not using Multi Fee Schedules, it will show the "Default" multi fee.

Change Code List		Enter Explosion Codes	MultiFee: Aetna	Calc. Insurance	New Claim	Fin. Ticker	Print				
Tooth #	Code	Surface	Description	Original Fee	Fee No Charge	Ins. Est.	Deductible	Pt Est.	Fee Presented	Dr. Location	Post All
1	2	3	18								Post
Totals:											Refresh

- Add the fee(s), and post or post all.
 - **Note:** The fee amount posted in the Ledger will be the Insurance fee so if a claim is created, this will also show the Insurance fee.

Change Code List		Enter Explosion Codes		MultiFee: Aetna		Calc. Insurance		New Claim		Fin. Tickler			
Tooth # Code		Surface	Description	Original Fee	Fee No Charge	Ins. Est.	Deductible	Pt Est.	Fee Presented Category	Dr. Location	Post All		
1	2	3	18	D3310	Anterior	\$1,100.00	\$1,100.00	\$1,100.00	\$0.00	\$0.00	A		
			2	Excellent									
1	2	3	18										
Totals:											\$1,100.00		

Online URL: <https://kb.tdo4endo.com/article.php?id=738>