How to calculate insurance WITHOUT using Insurance Estimating

738 TDO KB October 11, 2023 Program Setup, Site Configuration, TDO software 11.88K

How to calculate insurance without using Insurance Estimating:

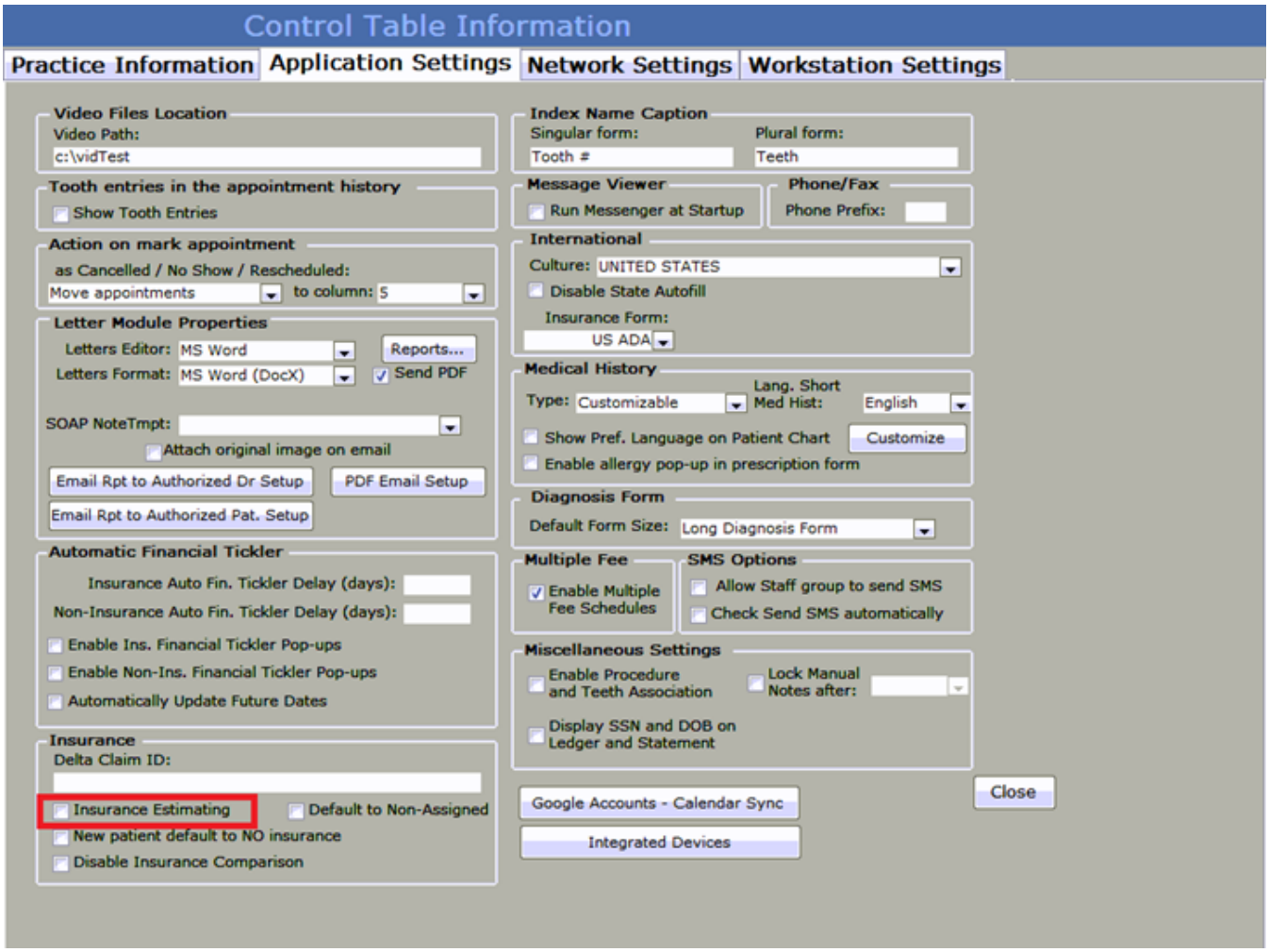
There is the option to not use the Insurance Estimating feature. Users will still be able to calculate insurance by assigning categories but you will not be able to create specific coverage tables.

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.

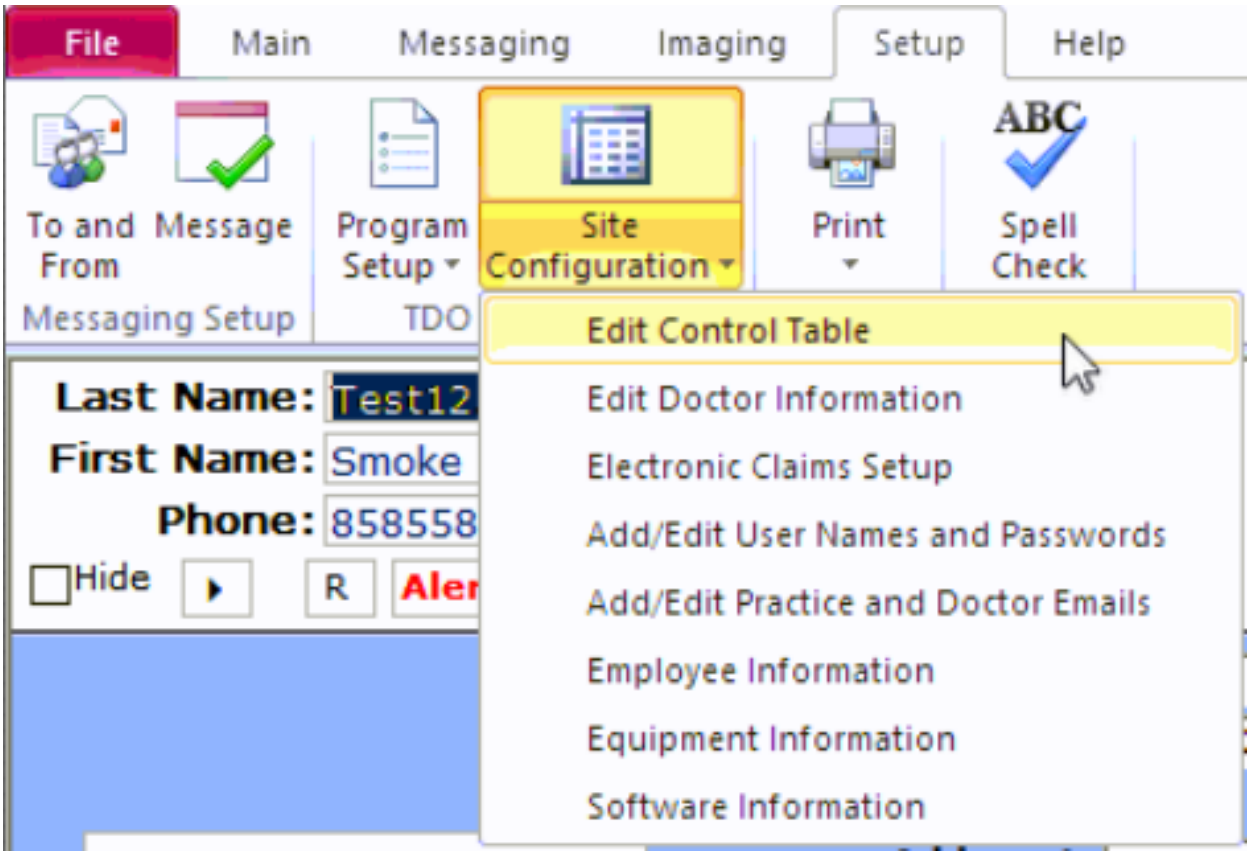
Initial Configuration

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.

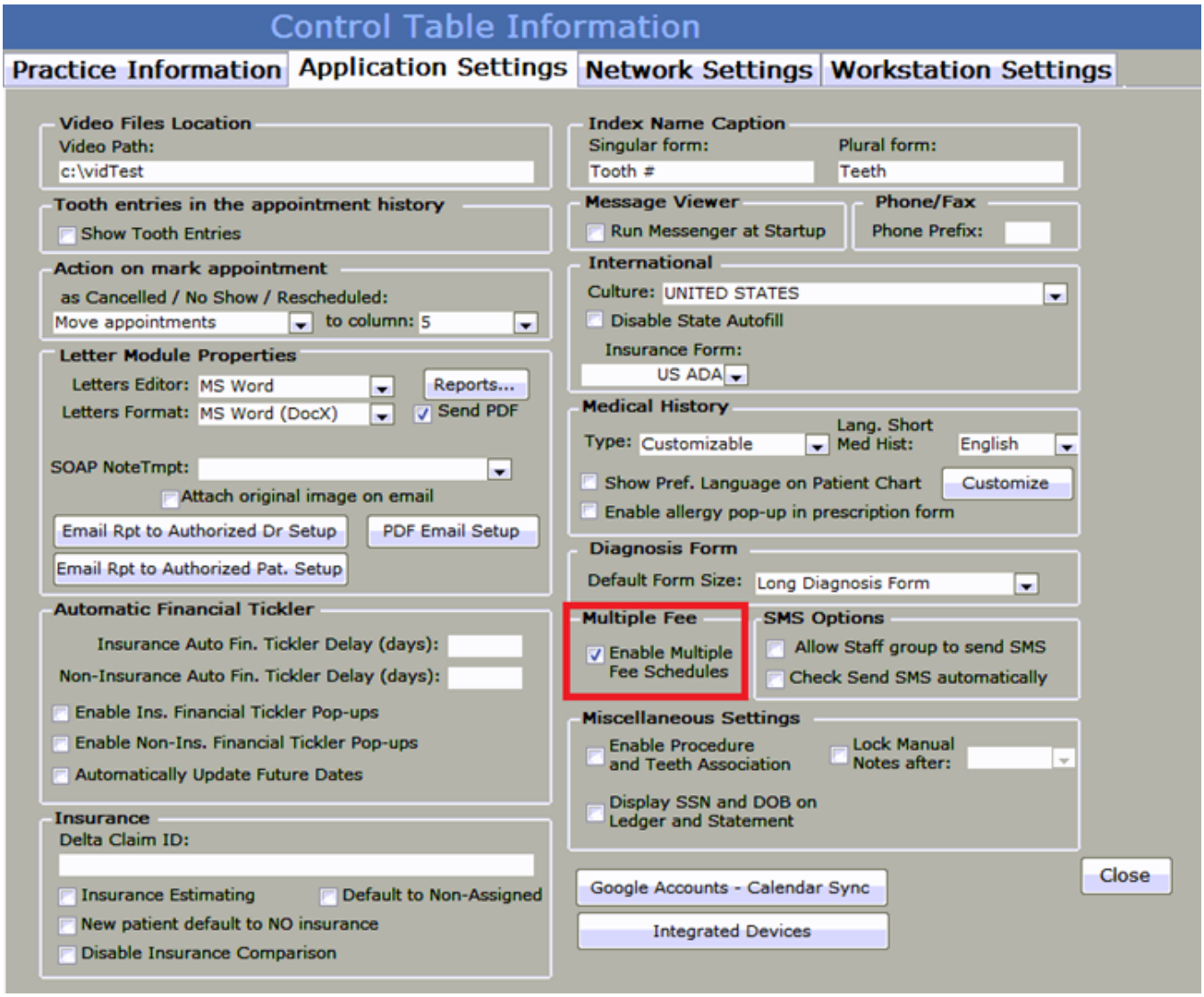


How to **Activate** Multi Fee Schedules**:**

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



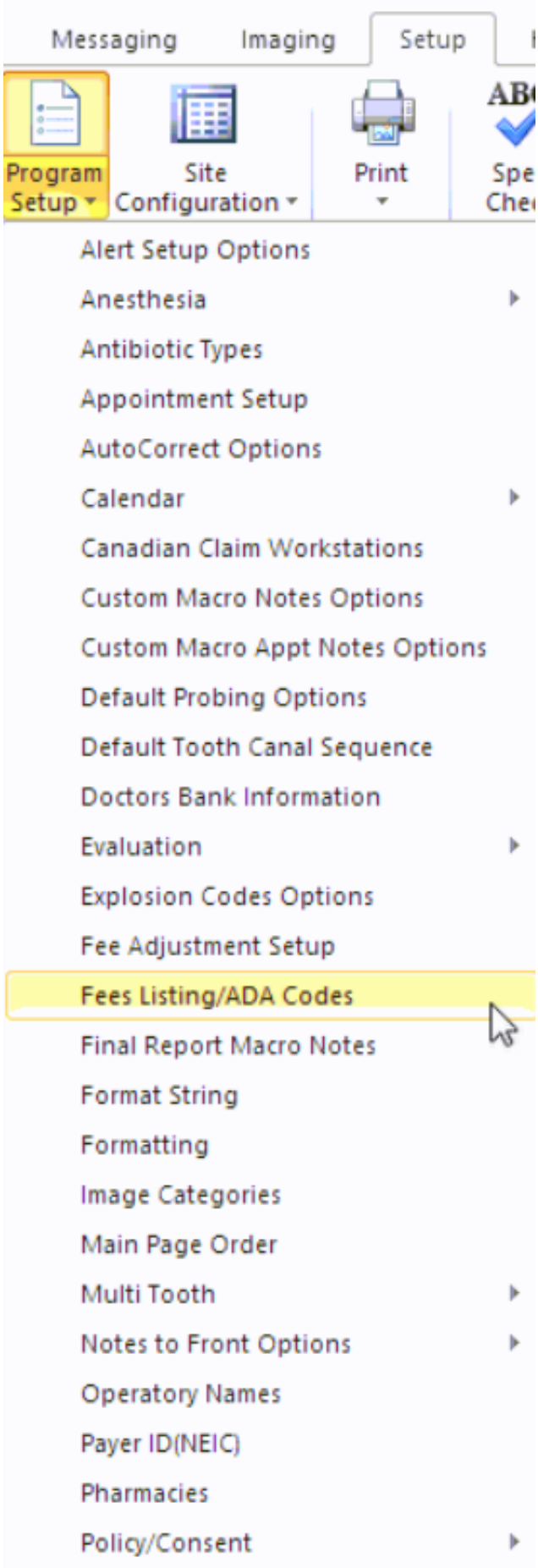
- On the **Application Settings** tab, check the box next to **Enable Multiple Fee Schedules.**



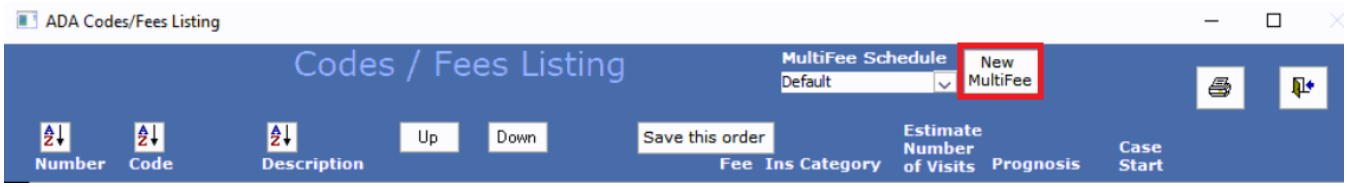
Adding a new Multi Fee Schedule**:**

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

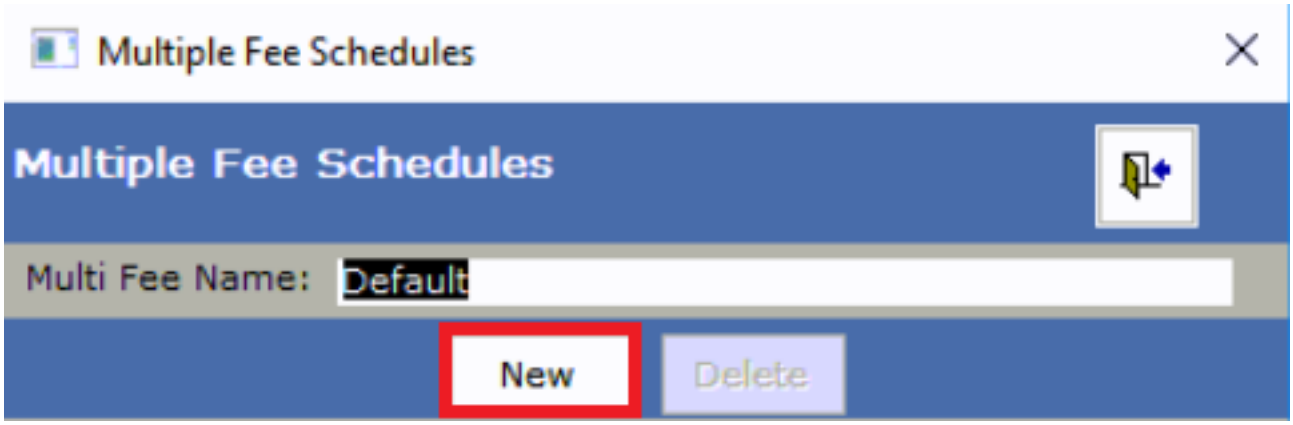
- Go to **Setup** and select **Program Setup,** Select the **Fees listing/ADA codes** option.


Messaging
Imaging
Setup
Program Setup
Site Configuration
Print
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

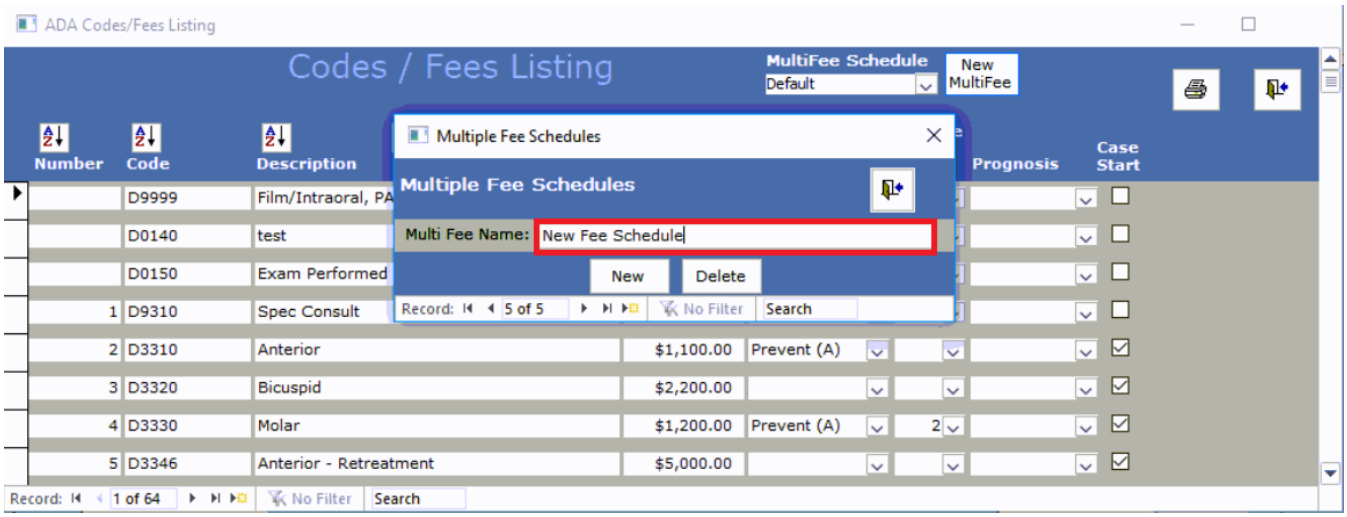
- Click on **New Multi Fee.**



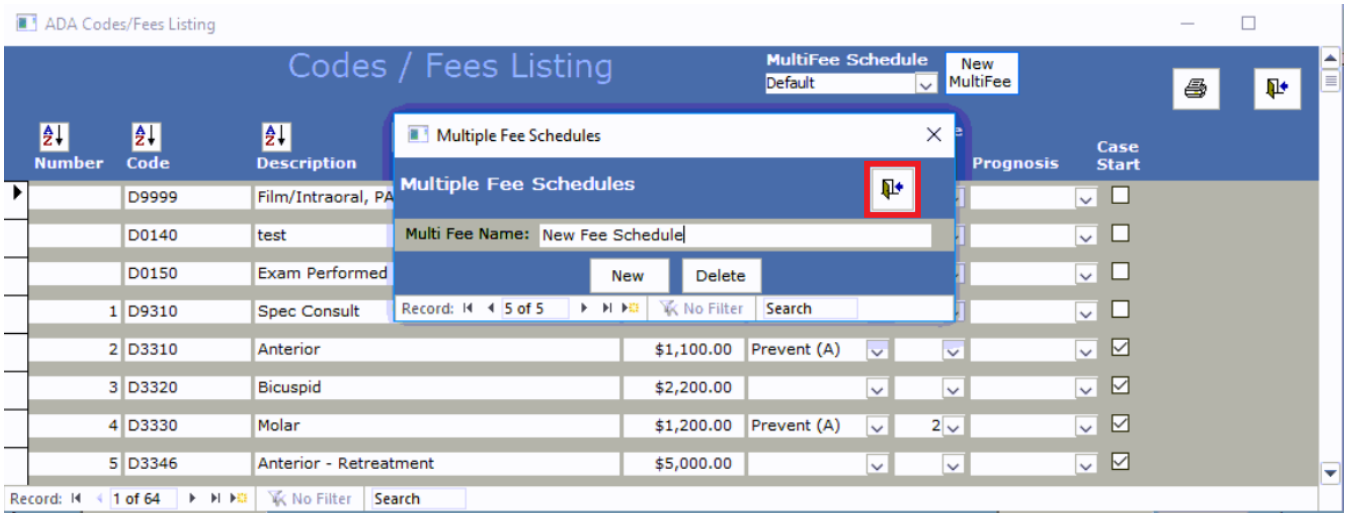
- Click on **New.**



- Name the New Multi Fee.



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



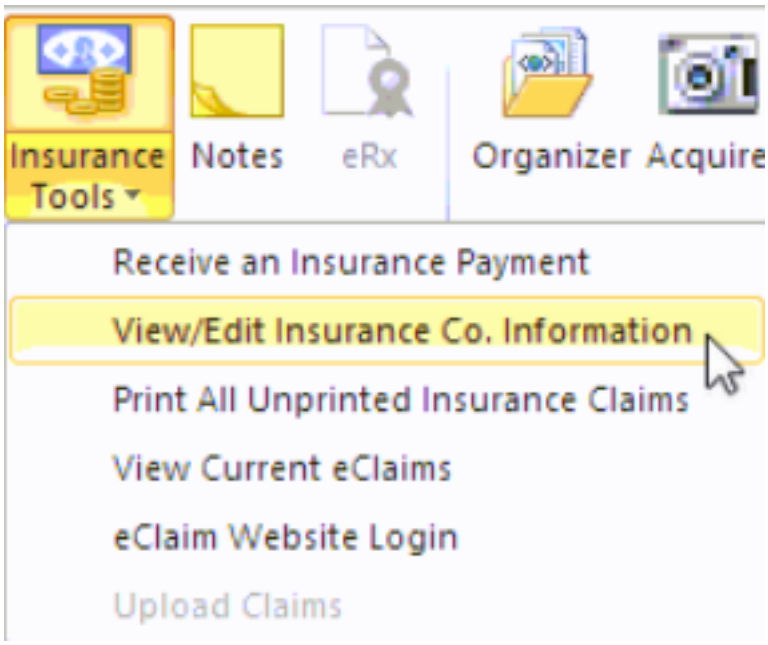
- List fees as either **A/B/C** under the **Fee Category** drop down.



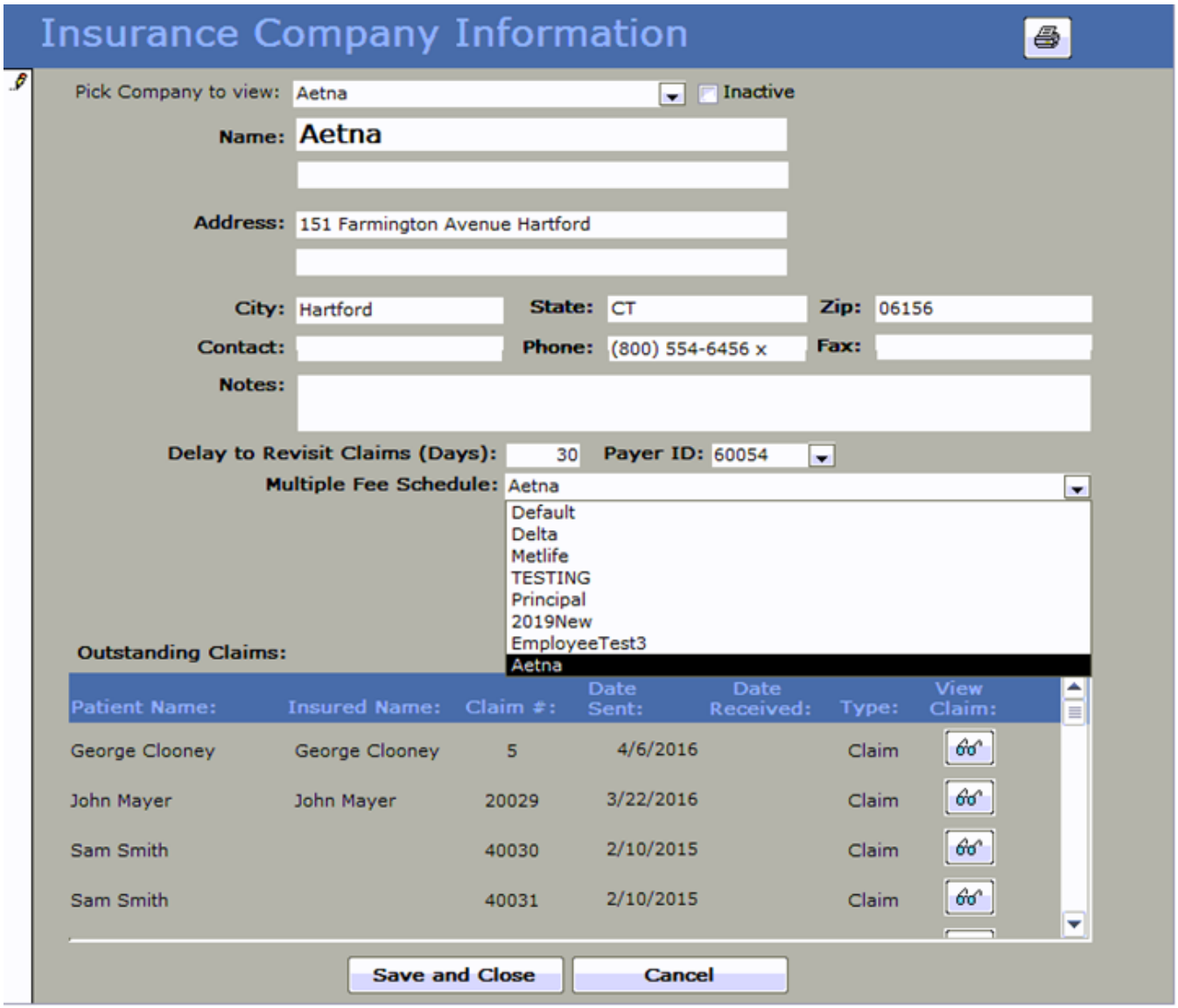
Attaching a Fee Schedule to an Insurance

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**.

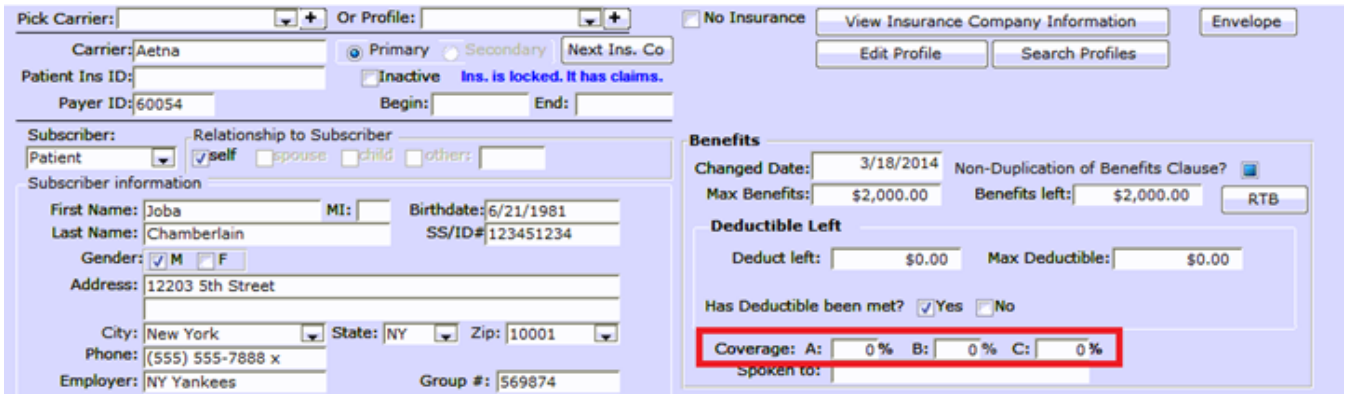


- Attach the **Multi Fee Schedule** that corresponds to the insurance company you select in the **Pick Company To View** drop down.

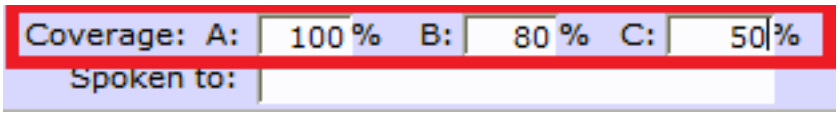


- **Save and Close** once finished.

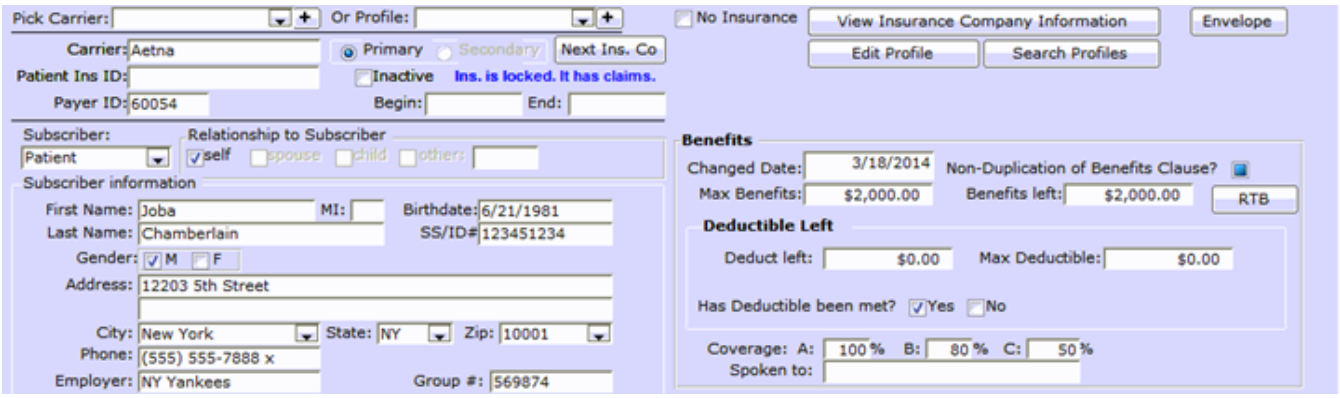
- Go to the **Insurance Tab** and locate the boxes for **Categories A/B/C.**



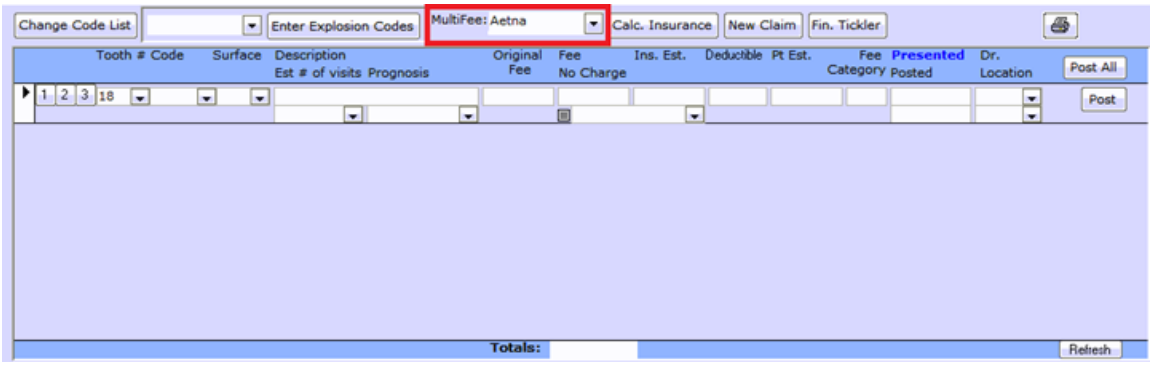
- Add percentages.



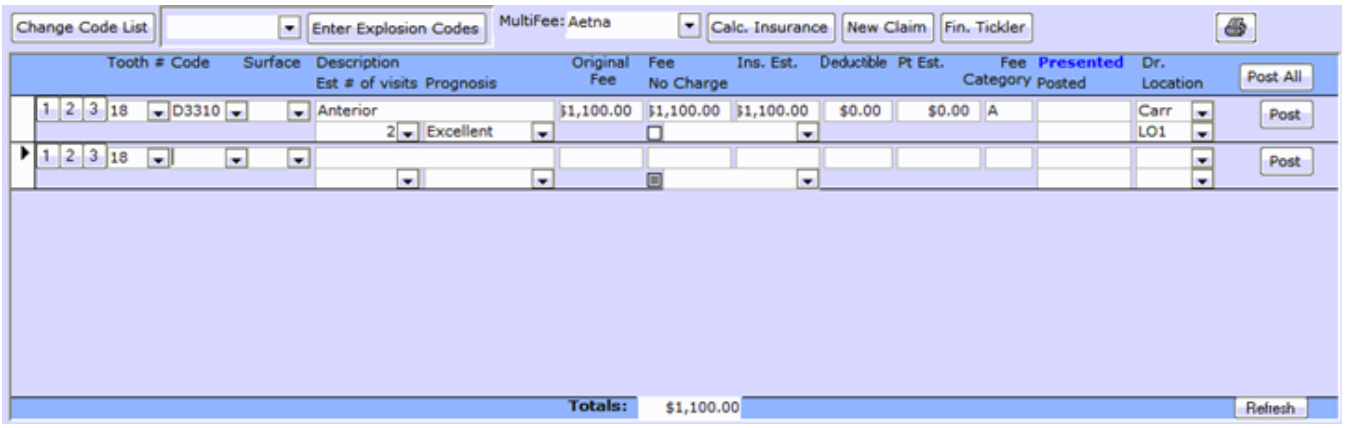
- These will calculate percentages corresponding to the category chosen in the fee schedule.



- 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.



- 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.



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