

WinOMS CS E-Services Quick Reference Sheet v. 8

Electronic claims

Creating and Sending Electronic Claims

- Click on Billing>Insurance Processing>Create Electronic Claims.
- If you are enrolled with NEA, attach any x-rays or documents you wish to send with the claim.
- Click on Create button.
- Click Print on Print Claims Submission Status Report screen.
- Click YES to transmit at “Claim processing complete” dialog box.
- Click OK on “active internet connection” dialog box.
- At this point your software will connect to the clearinghouse and transmit your claims.
- Click OK to the confirmation screen.
- Click on YES at “A transaction report has been received. Would you like to process and print this report” dialog box.
- The transaction report will open in Microsoft Word. Print the report from here.
- Fix any claims with errors (these claims will stay in the queue until they are corrected and created in a claim file) and repeat the above steps.

Retrieving Transaction Reports (without sending new claims)

- Click on the Billing>Insurance Processing>Create Electronic Claims.
- Click on Transmit button.
- Click OK on “active internet connection” screen.
- At this point your software will connect to the clearinghouse and a transaction report will be downloaded.
- Click on YES at “A transaction report has been received. Would you like to process and print this report” dialog box.
- The transaction report will open in Microsoft Word. Print the report from here.

*****Note: Transmitting claims and retrieving the transaction report can be done in one step after the first transmission of claims. ICOM will automatically look for waiting reports after transmitting the claim file has been uploaded.***

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Eligibility

From a Patients Chart

- Open a patient's chart.
- Click Insurance Eligibility button (RTE).
- An Eligibility report will then be retrieved and will pop up on the screen.

For a Walk-In Patient

- Open the Schedule
- Enter a new Walk In Patient or access Patient Activity for an existing Walk In.
- Click the Eligibility button at the bottom right.
- Select the patients Dr and click OK.
- An Eligibility report will then be retrieved and will pop up on the screen.

Electronic Statements

- Generate statements by going to Reports Billing>Statements.
- Choose the statement criteria.
- Click Generate.
- A preview list of statements will appear.
- Add statement messages and remove any statements you wish to exclude from the batch.
- Click Continue.
- Click OK to "Express Bill" dialog box.
- Click Print at "Print Statements Submitted Report" screen.
- Click YES to "Do you want to update statement history" dialog box.
- Click OK to "Statement submission file has been created. " dialog box.
- Minimize WinOMS CS.
- Click the tree icon on the desktop.
- Click Transfer files.
- Highlight the file.
- Click Transfer. At this point statements will be sent to Express Bill.
- Click Done. Close. Exit.

****Note:** *Expressbill will fax or email you two confirmations. One will confirm the receipt of the file. The other will confirm that the file has been printed and mailed.*

Credit Card Processing

Point-of-Service Charge

- Click on the Pay/Adj button at the top of a Patient's Chart.
- Enter Payment code and amount.
- Click Next.
- The ECCPS screen will open.
- At this point, either swipe the card, manually enter card information, or click on the Last button at the top right.
- Click on the submit button on the right.
- Upon approval, print receipts and post transactions as normal.

Settling Authorizations

- Click on Billing>Credit Card Processing>Settlement Stages.
- Click OK at the next screen.
- Click the icon next to #1. Review Pending Credit Card Transactions.
- On the Credit Card Processing Pending Transactions Screen, click the "Settle" icon at the bottom.
- A connection to the bank will be established to settle the transactions.
- Once the transactions have been settled, click yes to print a Confirmation report.
- Click Print then close the window.

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