

OrthoTrac Office E-Services Quick Reference Sheet v 11

Electronic claims

Processing Continuation of Treatment Claims** (to be performed once a month)

- Click on the Insurance Icon at the top of OrthoTrac.
- Click on Continuation of Treatment.
- With the dot in Confirm all printed claims, click Confirm.
- With the dot in Generate Claims, click Generate.
- With the dot in Print all Unprinted Claims, click Print.
- This will print all Continuation of Treatment claims that are not set to electronic.
- Once done, they can move on to Creating and Sending Electronic Claims.

Creating and Sending Electronic Claims

- Click on the Insurance Icon at the top of OrthoTrac.
- Click on Claim Processing.
- Click on Create Electronic Claims, then click Create.
- Click OK on the Print Insurance Claim screen.
- Click Yes once claims are generated and the Electronic Claim Maintenance screen will appear.
- Click Edit/View Claims.
- Fix or remove any claims with errors. (A full claim form can be viewed by double clicking the claim).
- Click the Transmit button when ready to send.
- At this point their software will dial out or send via high speed their Electronic Claims.
- After the transmission is complete, click Print Transmission Report to print out a report of what was transmitted.

Retrieving Transaction Reports

- Click on the insurance icon at the top of OrthoTrac.
- Click on Electronic Claims.
- Click on Retrieve Transaction Report.
- Once a transaction report has been retrieved, click Print Transaction Report.

*****Note: Continuation of treatment claims are usually done once a month. However, Actual and One-time claims can be processed throughout the month by simply skipping the Continuation of Treatment steps and going directly to Processing and Printing Electronic Claims.***

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Eligibility

- Enter a patient's chart.
- Click on Functions >> Financial Functions >> Insurance Eligibility.
- If there is more than one Responsible party with insurance, choose the responsible party you wish to check 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 >> Financial >> Statements >> Generate Statements.
- Choose the statement criteria. (i.e. due now, 30+ day old accounts, etc.)
- Click OK, then OK, and the statements will be generated.
- Preview statements by going to Reports >> Financial >> Statements >> Print/View Statements.
- Click on View Generated Statements button.
- Preview generated stmts. (Individual stmts. can be viewed by double clicking or removed by highlighting and clicking remove.)
- Once stmts. have been approved, click Express button and stmts. will be sent to Expressbill for processing.

*****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

Regular Point-of-Service Charge

- Click on the Financial Functions button at the top of a Patients Chart.
- Click on Payments and choose Credit Card.
- Hit Tab key, and enter in VISA, MC, etc.. in ref:
- Hit Tab, then enter amount and Tab again.
- 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.

Setting up an ECCPS Auto-Payment**

- Click on the Financial Functions button at the top of a patient's hart.
- Click on the Auto-Payments Icon.
- Choose the Cards tab.

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- Enter in Number of cards (how many charges), Type of card, Amount (of each charge), First payment due date, Tab through remaining fields.
- An ECCPS screen will pop up.
- At this point either swipe the card, or manually enter card information.
- Put a check in Process online.
- Click Post Transactions button at the top.

****Note: For Auto-Payments that have been previously setup, an office will only need to put a check in process online and click in the Acct# field and reenter the card number in the ECCPS system.**

Running ECCPS Auto Payment Reports

- Click on Reports >> Financial >> Auto Payment >> Auto Payment reports.
- Choose Unposted and Detail.
- Choose Credit Card Drafts.
- Choose the Starting and Ending dates.
- Click OK.

Processing ECCPS Auto-Payments

- Click on Reports >> Financial >> Auto Payment >> Post Auto Payments.
- On the Post Auto Payment screen, put a check in Credit Card Drafts.
- Click Post.
- A connection with the bank will be established to authorize all cards at once.
- When complete an authorized and declined report will print.
- All charges are now ready to be settled.

Settling Authorizations

- Click on Report >> Financial >> Daysheet >> Settle Credit Card Authorizations.
- Click Yes at the next screen.
- On the Credit Card Processing Pending Transactions Screen, click the green piece of paper icon at the bottom.
- A connection with the bank will be established to settle the transactions.
- Once the transactions have been settled, click yes to print a Confirmation report.
- Click Print again, then close the window.

ACH Processing

Setting up an ACH Auto-Payment

- Click on the Financial Functions button at the top of a Patients Chart.
- Click on the Auto-Payments Icon.
- Choose the Drafts tab.

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- Enter in Number of Drafts (how many charges), Type of account, Amount (of each charge), First payment due date, and Starting payment month, then Tab through remaining fields.
- Put a check in Process online.
- Click in the account number field and the ACH Details screen will appear.
- Enter the account information from the check.
- Click Post Transactions button at the top.

Running ACH Auto Payment Reports

- Click on Reports >> Financial >> Auto Payment >> Auto Payment reports.
- Choose Unposted and Detail.
- Choose Bank Drafts.
- Choose the Starting and Ending dates.
- Click OK.

Processing ACH Auto-Payments

- Click on Reports >> Financial >> Auto Payment >> Post Auto Payments.
- On the Post Auto Payment screen, put a check in Bank Drafts.
- Click Post.
- A connection with the bank will be established and all ACH payments will be sent to the bank for processing.
- When complete a posted ACH payment report will print.

*****Note:*** *Two to three days after posting ACH auto payments an office will need to access their Transaction Central website to check for and resolve any insufficient funds or invalid account notices.*