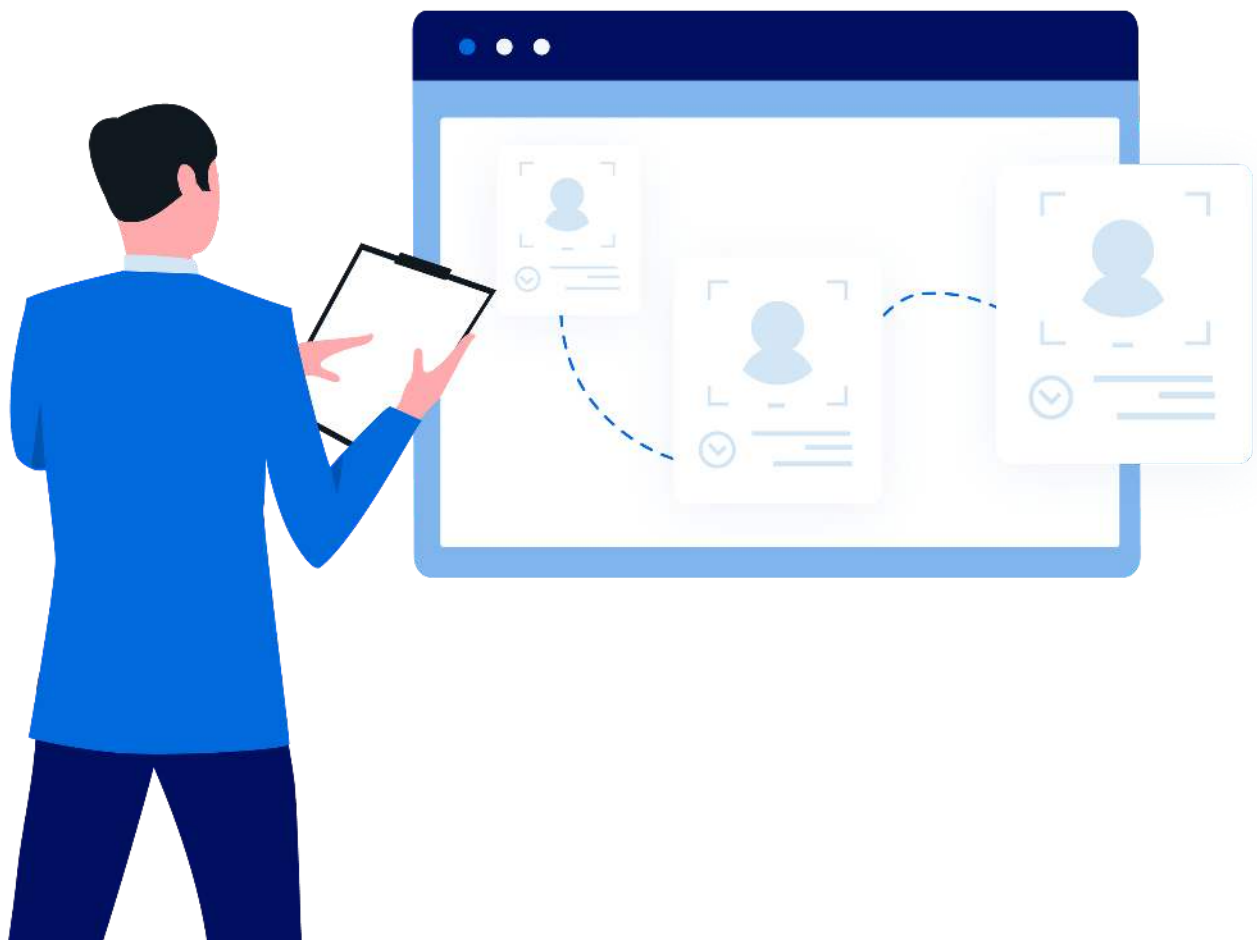


## Help Articles

# How can we quickly assign our fee schedules?



# How can we quickly assign our fee schedules?

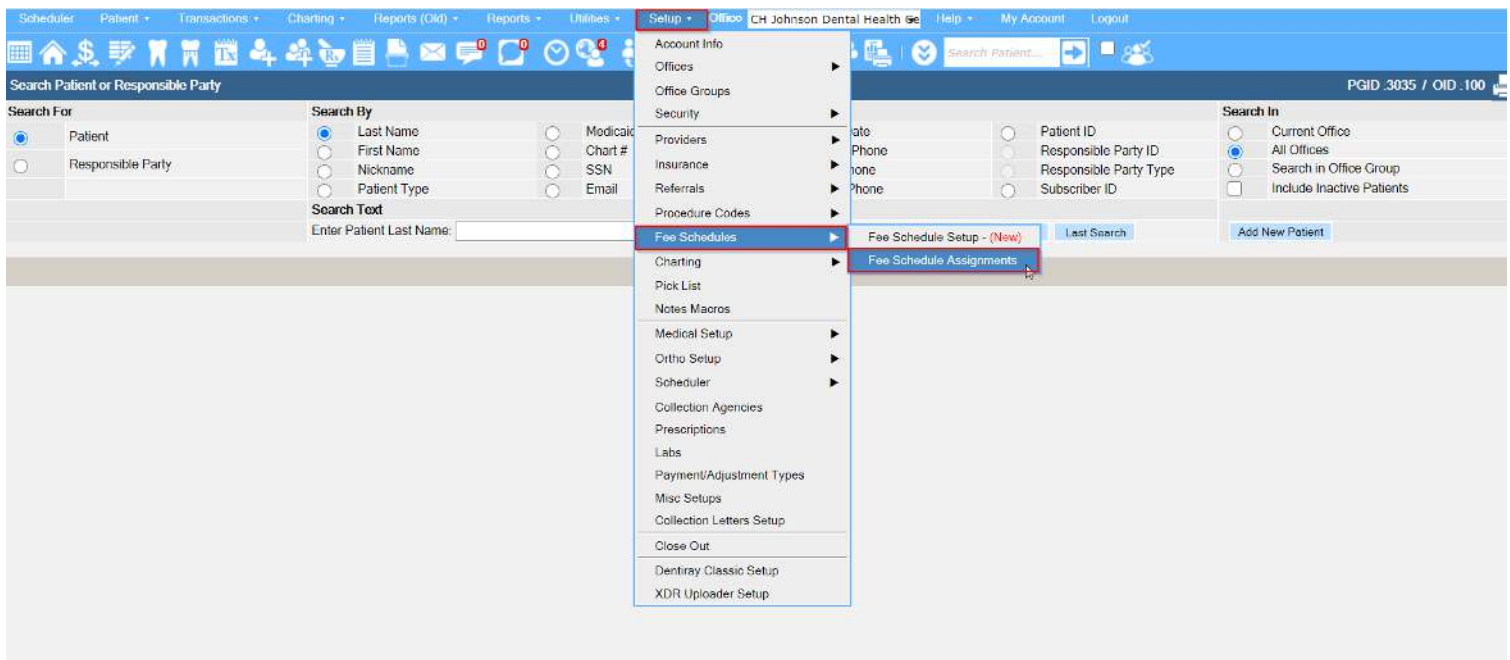
NOTE: PPO fee schedules are attached to insurance carriers rather than individual plans. Attachment of a PPO fee schedule to a plan will not return the expected financial result to the patient record.

**Managed Care and Medicaid fee schedules may be attached to plans.**

Office type schedules are attached only to patients. The fee schedule will be indicated on the patient overview screen as the preferred schedule.

Specialist type fee schedules may be attached to the provider.

Click the word "Setup" and choose the "Fee Schedules" and "Fee Schedule Assignments" options from the drop-down box.



First search to ensure the carrier/plan and fee schedule are not already attached together. To investigate if the fee schedule is assigned to a carrier, complete the appropriate plan-specific "Search" fields at the top of the screen using the filters in each category, and click the Search button. A listing of matches for the search criteria is returned in the middle of the screen.

## Example 1: PPO Type Fee Schedule - Assign to Carrier

- Select the PPO Fee Schedule
- Select an Office if Applicable (Multi Locations should use this option if the fee schedule only applies to 1 specific office)
- Search for the Carrier and Select all that applies
- Click the Assign New Fee Schedules button

Select the Filter Icon to minimize the search results.

The screenshot shows the 'Fee Schedule Assignments' interface. The 'Fee Schedule' section is selected, and the 'PPO Delta Dental-Cut Back Fee Schedule' is chosen. The 'Carrier' section is also selected, and the 'AIG / US LIFE INSURANCE' carrier is selected. The 'Assign Fee Schedules' button is highlighted.

Fee Schedule Name	Fee Schedule Type
<input type="radio"/> HMO Aetna M	Ins - Managed Care
<input checked="" type="radio"/> PPO Delta Dental-Cut Back Fee Schedule	Ins - PPO
<input type="radio"/> BCBS	Ins - PPO

Carrier Name	Payer ID
<input type="checkbox"/> AIG / US LIFE INSURANCE	13545
<input type="checkbox"/> Aetna	60054
<input type="checkbox"/> AETNA (KY) DHMO	68246

## Example 2: HMO Type Fee Schedule- Assign to Plan

- Select the HMO Fee Schedule
- Select an Office if Applicable (Multi Locations should use this option if the fee schedule only applies to 1 specific office)
- Search for the Plan and Select all that applies
- Click the Assign Fee Schedules button

Select the Filter Icon to minimize the search results.

The screenshot shows the 'Fee Schedule Assignments' interface. The 'Fee Schedule' section is selected, and the 'HMO Aetna M' is chosen. The 'Plan' section is also selected, and the 'AMC-224699' plan is selected. The 'Assign Fee Schedules' button is highlighted.

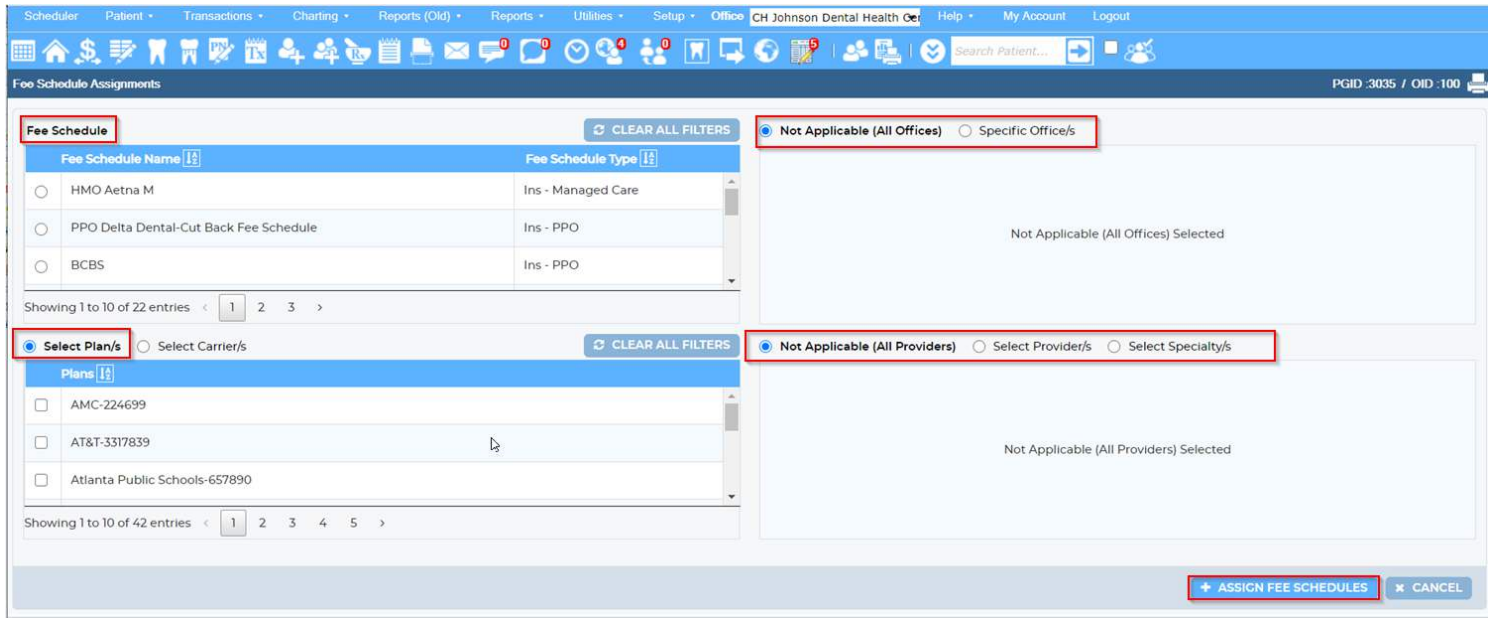
Fee Schedule Name	Fee Schedule Type
<input checked="" type="radio"/> HMO Aetna M	Ins - Managed Care
<input type="radio"/> PPO Delta Dental-Cut Back Fee Schedule	Ins - PPO
<input type="radio"/> BCBS	Ins - PPO

Plans
<input type="checkbox"/> AMC-224699
<input type="checkbox"/> AT&T-3317839
<input type="checkbox"/> Atlanta Public Schools-657890

### Example 3: Medicaid Fee Schedule- Assign to Plan

- Select the Medicaid Fee Schedule
- Select an Office if Applicable (Multi Locations should use this option if the fee schedule only applies to 1 specific office)
- Search for the Plan and Select all that applies
- Click the Assign Fee Schedules button

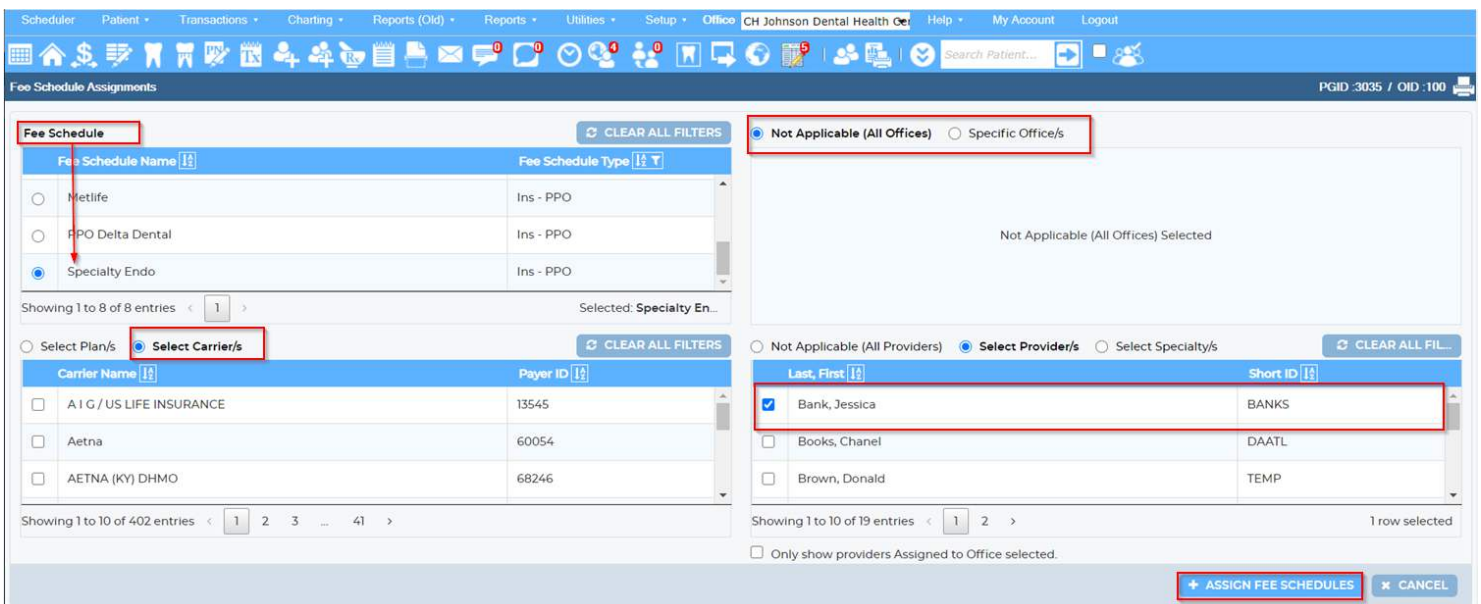
Select the Filter Icon to minimize the search results.



### Example 4: Specialist Fee Schedule - Assign to Provider

- Select the Specialist Fee Schedule
- Select an Office if Applicable (Multi Locations should use this option if the fee schedule only applies to 1 specific office)
- Select the Provider
- Click the Assign Fee Schedules button

Select the Filter Icon to minimize the search results.



## Example 5: Discount Fee Schedule - Assign to Discount Plan

- Select the Discount Fee Schedule
- Select an Office if Applicable (Multi Locations should use this option if the fee schedule only applies to 1 specific office)
- Search for the Plan and Select all that applies
- Click the Assign Fee Schedules button

**Fee Schedule**

Fee Schedule Name	Fee Schedule Type
<input checked="" type="radio"/> JDC Discount-Gold Plan	Ins - Managed Care
<input type="radio"/> MCNA Kids	Ins - Managed Care
<input type="radio"/> Test Medicaid	Ins - Managed Care

Showing 1 to 8 of 8 entries < 1 > Selected: JDC Discoun...

Select Plan/s  Select Carrier/s

**Plans**

Plans
<input checked="" type="checkbox"/> JDC Gold Plan-1234567

Showing 1 to 1 of 1 entries < 1 > 1 row selected

Not Applicable (All Offices)  Specific Office/s

Not Applicable (All Offices) Selected

Not Applicable (All Providers)  Select Provider/s  Select Specialty/s

Not Applicable (All Providers) Selected

**ASSIGN FEE SCHEDULES** **CANCEL**

## Example 6: PPO Fee Schedule and Smart Fee Fee Schedule - Assign PPO Fee Schedule to Carrier and Smart Fee Fee Schedule to Plan

- Step 1
  - Select the PPO Fee Schedule
  - Select an Office if Applicable (Multi Locations should use this option if the fee schedule only applies to 1 specific office)
  - Search for the Carrier and Select all that applies
  - Click the Assign Fee Schedules button

**Fee Schedule**

Fee Schedule Name	Fee Schedule Type
<input type="radio"/> HMO Aetna M	Ins - Managed Care
<input checked="" type="radio"/> PPO Delta Dental-Cut Back Fee Schedule	Ins - PPO
<input type="radio"/> BCBS	Ins - PPO

Showing 1 to 10 of 22 entries < 1 2 3 >

Select Plan/s  Select Carrier/s

**Carrier Name**

Carrier Name	Payer ID
<input type="checkbox"/> AIG / US LIFE INSURANCE	13545
<input type="checkbox"/> Aetna	60054
<input type="checkbox"/> AETNA (KY) DHMO	68246

Showing 1 to 10 of 402 entries < 1 2 3 ... 41 >

Not Applicable (All Offices)  Specific Office/s

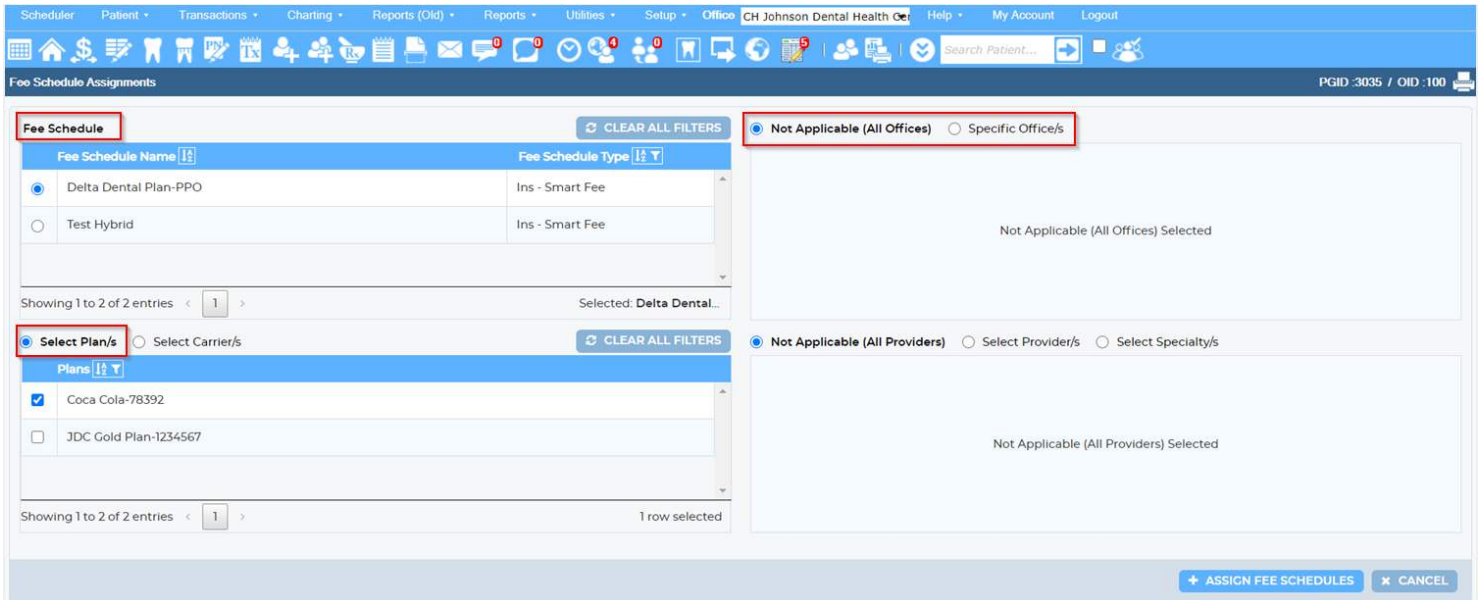
Not Applicable (All Offices) Selected

Not Applicable (All Providers)  Select Provider/s  Select Specialty/s

Not Applicable (All Providers) Selected

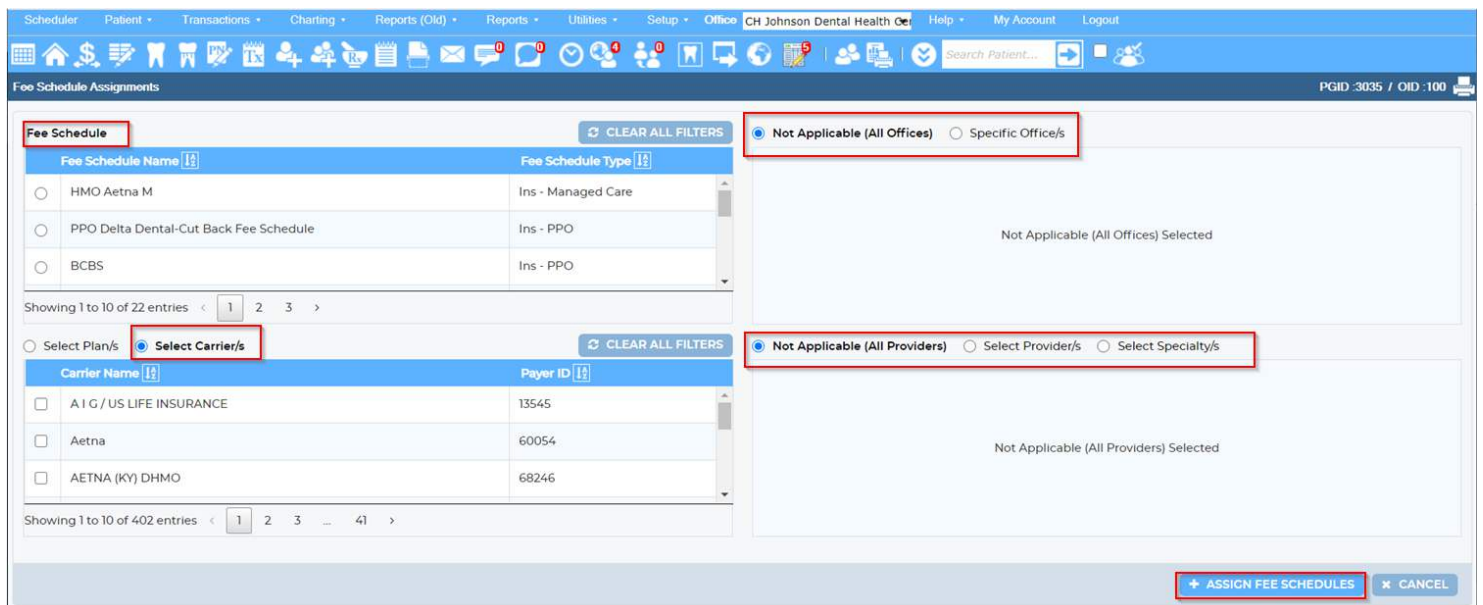
**ASSIGN FEE SCHEDULES** **CANCEL**

- Step 2
  - Select the Smart Fee- Fee Schedule
  - Select an Office (Multi Locations should use this option if the fee schedule only applies to 1 specific office)
  - Search for the Plan and Select all that applies
  - Click the Assign Fee Schedules button



### Example 7: PPO Fee Schedule and Patient Copay Fee Schedule - Assign PPO Fee Schedule to Carrier and Patient Copay Fee Schedule to Plan

- Step 1
  - Select the PPO Fee Schedule
  - Select an Office if Applicable (Multi Locations should use this option if the fee schedule only applies to 1 specific office)
  - Search for the Carrier and Select all that applies
  - Click the Assign Fee Schedules button



- Step 2

- Select the Patient Copay Fee Schedule
- Select an Office (Multi Locations should use this option if the fee schedule only applies to 1 specific office)
- Search for the Plan and Select all that applies
- Click the Assign Fee Schedules button

The screenshot displays the 'Fee Schedule Assignments' interface. At the top, a navigation bar includes 'Scheduler', 'Patient', 'Transactions', 'Charting', 'Reports (Old)', 'Reports', 'Utilities', 'Setup', 'Office', 'CH Johnson Dental Health Oc', 'Help', 'My Account', and 'Logout'. Below the navigation bar is a search bar and a 'Search Patient...' button. The main content area is divided into several sections:

- Fee Schedule:** A table with columns 'Fee Schedule Name' and 'Fee Schedule Type'. It contains one entry: 'Metlife-Federal Govt Pat Copay Plan' with type 'Ins - Pat Co-pay'. A 'CLEAR ALL FILTERS' button is located above the table.
- Showing 1 to 1 of 1 entries:** A pagination control showing '1' selected.
- Select Plan/s:** A section with radio buttons for 'Select Plan/s' (selected) and 'Select Carrier/s'. Below it is a table with columns 'Plans' and 'Fee Schedule Type'. It contains three entries: 'Coca Cola-78392', 'Federal Employees-2136456' (checked), and 'JDC Gold Plan-1234567'. A 'CLEAR ALL FILTERS' button is located above the table.
- Showing 1 to 3 of 3 entries:** A pagination control showing '1' selected.
- Office Selection:** A section with radio buttons for 'Not Applicable (All Offices)' (selected) and 'Specific Office/s'. Below it is a large empty box with the text 'Not Applicable (All Offices) Selected'.
- Provider Selection:** A section with radio buttons for 'Not Applicable (All Providers)' (selected), 'Select Provider/s', and 'Select Specialty/s'. Below it is a large empty box with the text 'Not Applicable (All Providers) Selected'.
- Buttons:** At the bottom right, there is a red-bordered button labeled 'ASSIGN FEE SCHEDULES' and a 'CANCEL' button.