QuickBill

for Easy Dental®

Version 3.0

National
INFORMATION SERVICES®

A **HENRY SCHEIN®** COMPANY

727 E. Utah Valley Dr., Ste. 750
American Fork, UT 84003
Tel: (800) 734-5561 • Fax: (801) 847-3800

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LICENSES AND TRADEMARKS

QUICKBILL AND MICROSOFT WINDOWS

QuickBill for Easy Dental operates in a graphical environment called Windows, created by Microsoft Corporation. Microsoft Windows gives a standard look and feel to QuickBill for Easy Dental and all other Windows applications. To run QuickBill for Easy Dental and Microsoft Windows, you need to first license and install Microsoft Windows.

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Contents

Introduction

QuickBill for Easy Dental is designed to cut down on the cost and hassle of your monthly billing. QuickBill allows you to create bills as you have always done with Easy Dental. However, instead of printing, folding, licking, and stamping hundreds of bills, QuickBill transmits your bills to National Information Services (NIS) who will do everything for you with the click of a button!

Users will need to complete two major steps to become fully operational. These steps are: (1) installing the software; (2) configuring QuickBill for Easy Dental to your practice. To help you accomplish each of these steps, the following chapters are organized as follows:

1. How to install QuickBill for Easy Dental
2. Setting up and Using QuickBill.

Installation

The QuickBill for Easy Dental installation is very simple and should only take a few minutes.

Note: Before QuickBill for Easy Dental can be installed you must be running Easy Dental version 2003 or higher. If you have not yet installed Easy Dental 2003 you should do so now.

1:   Insert the QuickBill for Easy Dental CD-ROM
Insert the QuickBill for Easy Dental CD-ROM into your CD-ROM drive. If your computer is equipped with AutoStart technology, the installation will begin automatically. Proceed to step 4. If the installation does not begin automatically, complete steps 2 and 3.

2:   Click Start | Run
Click on the Windows Start button and then choose Run.

*Choose **Run** from the **Start** menu.*
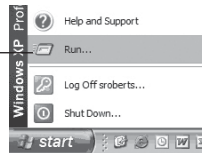
The Run dialog box will appear.

3. Type D:\Setup in the Command Line
Type D:\Setup in the command line. (D: represents the drive letter for the CD-ROM drive.) Click the OK button to begin the installation.

Type D:\Setup in the Command Line
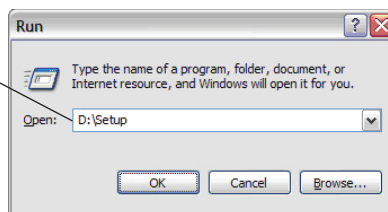
The installation setup screen will appear for several seconds followed by a Welcome screen.
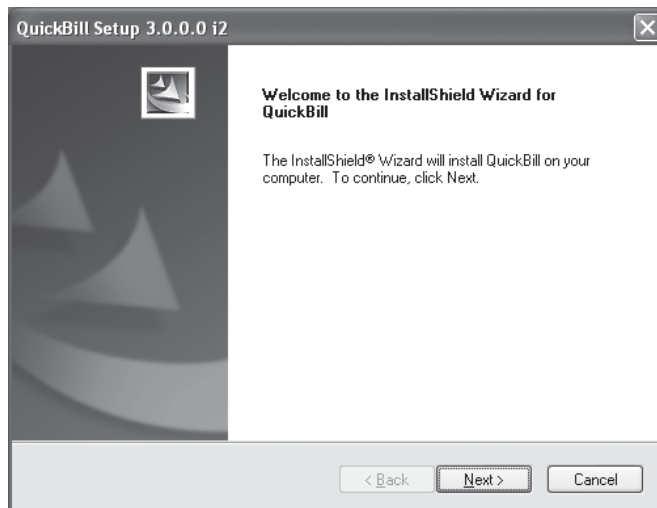
4:   Click Next

Read the Welcome screen and click the Next button to continue the installation.
The Software License Agreement screen will appear
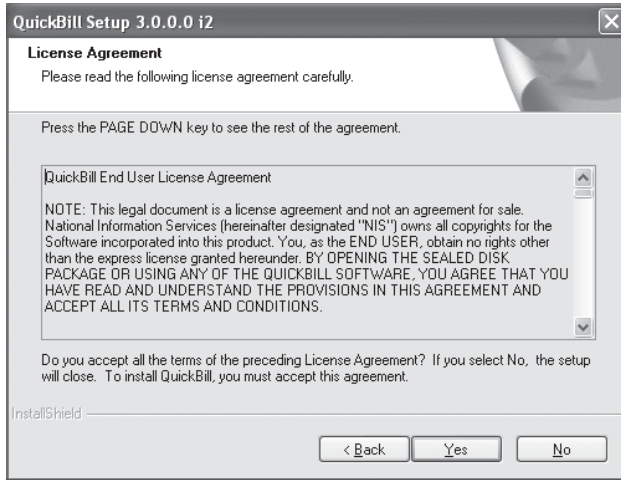
5: Click Yes

Read the information contained in the license agreement. If you agree with the terms of the license agreement, click Yes and the installation will continue. If you do not agree to the terms of the license agreement, click No and the installation will close.
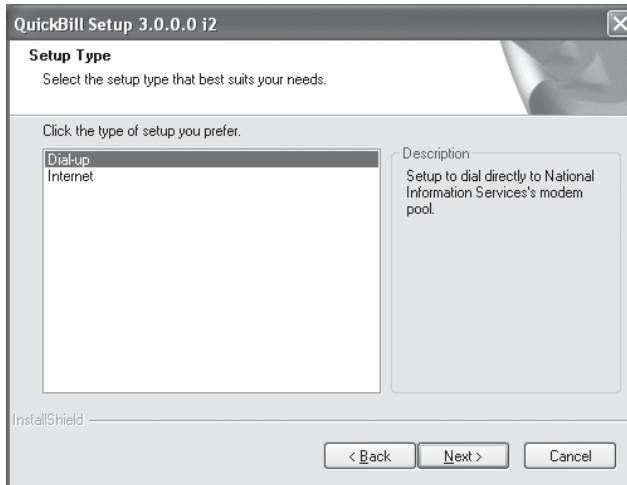
6: Select Setup Type

Highlight the type of setup you prefer. Click Next to continue.

- **Dial-up** allows you to send billing statements to NIS via modem.

- **Internet** allows you to send billing statements to NIS through the Internet. (You must have Internet access to use this feature.)

7

7: Click Finish

After a few seconds the Setup Complete screen will appear. Click Finish to complete the installation.
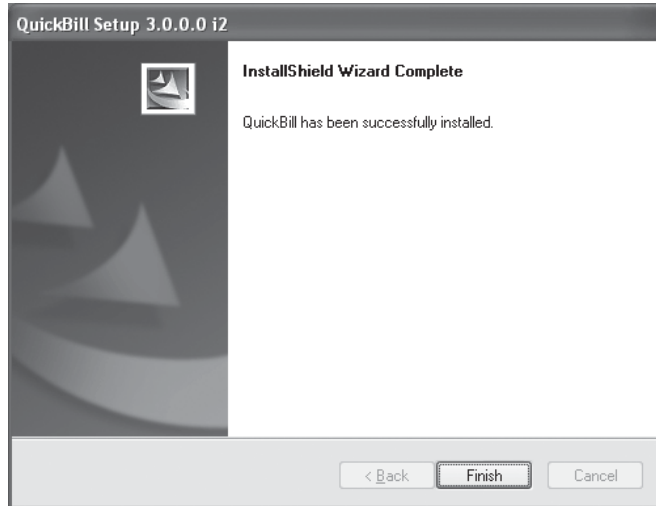
8: Click OK to Setup

When you click Finish, a message will appear stating that it will now open Quick-Bill Setup. Click OK to continue. Follow the steps listed in the next section to configure your electronic billing.
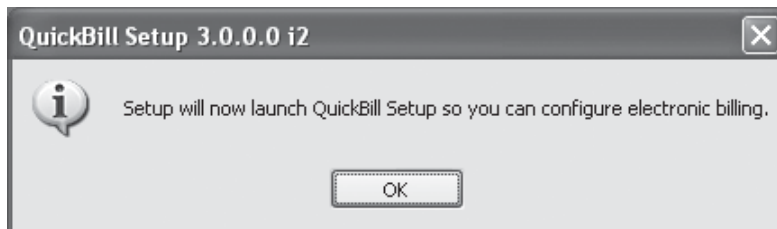
QuickBill Setup

If you have not been directed to the QuickBill Setup through the installation, complete step 1. If you are already in the setup screen, proceed to step 2.

1: Select Practice Setup | Electronic Billing Setup

From Reports click the Practice Setup button and Electronic Billing Setup. The QuickBill Setup window will appear.
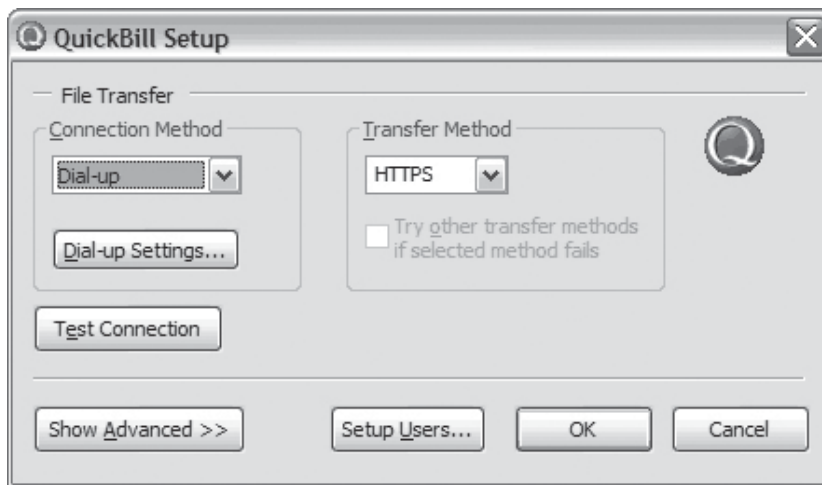
2: Select Connection Method

Click the down arrow and choose the desired connection method.

- **Dial-up** allows you to send billing statements to NIS via modem.

- **Internet** allows you to send billing statements to NIS through the Internet. (You must have Internet access to use this feature.)

If you select Dial-up as your connection method, you must choose at least one local-access number for QuickBill to dial when sending statements. Click Dial-up Settings to display the QuickBill Dial-up Settings. Enter your area code. A list of all applicable local-access numbers for the area code will appear. Select multiple area codes by holding the Ctrl key while selecting access numbers.
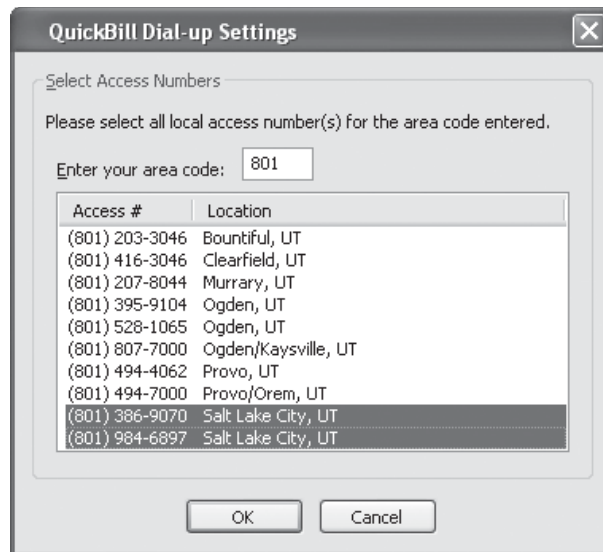
Note: Please check with your telephone company to confirm that under your calling plan the selected access numbers will not result in additional charges. You are solely responsible for telephone charges related to accessing our services. You will not be reimbursed for any such charges, including long-distance and toll charges.

Click OK to save your dial-up settings.

3: Select Transfer Method

Select the type of transfer method for electronic billing. You may choose FTP, Passive FTP, HTTP, or Secure HTTP.

4: Try Other Transfer Methods (Optional)

You may check the option to 'Try other transfer methods if the preferred method fails'. This means that if the method you have selected does not work, QuickBill will automatically try a different transfer method.

5: Setup Users
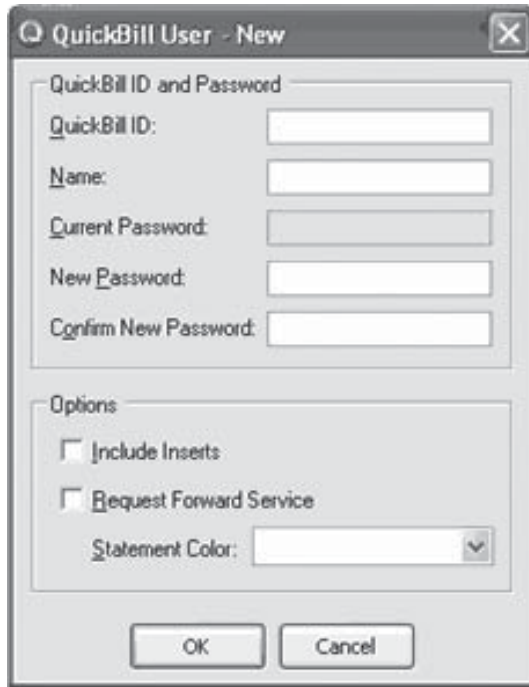
Quickbill allows you to send statements for multiple QuickBill user accounts. To create an account, click the Setup Users button. The QuickBill User setup window will appear.
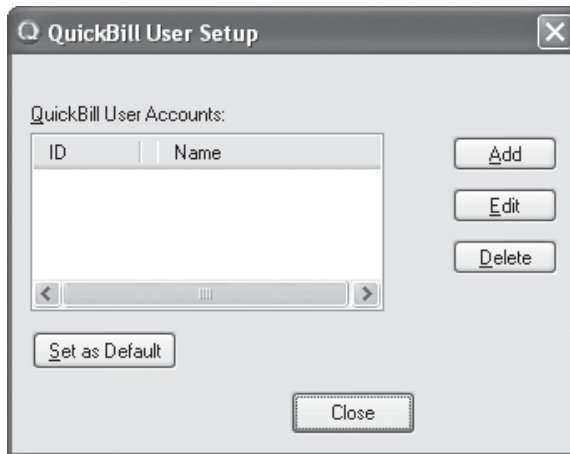
6: Add User Account(s)

To add your QuickBill user account click the Add button. The QuickBill New User window will appear. Type your NIS QuickBill ID in the ID field. This ID will be issued to you by NIS. (If you do not have your QuickBill ID, contact NIS at (800) 734-5561).

Type the account name (this is used internally with QuickBill software to easily identify the account). Type the desired password into the New Password and Confirm New Password fields. (The passwords are case sensitive). The passwords must match. If Include Inserts is checked, you will be able to include inserts with your statements. If Request Forward Service is checked, the text "Forward Service Requested" will be printed on the mailing envelope. To specify the color of your statement paper, click the down arrow next to Statement Color and select the desired color. Click OK.

Note: When processing statements for multiple QuickBill accounts, you should set an account by selecting the account and clicking Set as Default. The default account will be automatically selected when sending your statements.

7: Advanced Options
Click the Show Advanced button to display settings such as server, port, and QuickBill path. (This will be used for testing purposes only).

8: Click OK
Click OK to save your settings and begin using QuickBill.

Verify Billing Statements to Send

Normally an office manager will input specific parameters to control which patient statements are printed. However, there are times when you may not want to send a statement to a specific patient who otherwise would receive a bill. The Verify Billing option generates a list of all guarantors (up to 700 at one time) who should receive a bill and then allows the user to remove certain patients from the list before statements are sent. In order to use this feature you must do the following as part of your setup:

1: Choose Maintenance | Preferences
From the Reports M odule click the Maintenance button, Preferences. Click the Print Options tab. The Preferences Print Options window will be displayed.
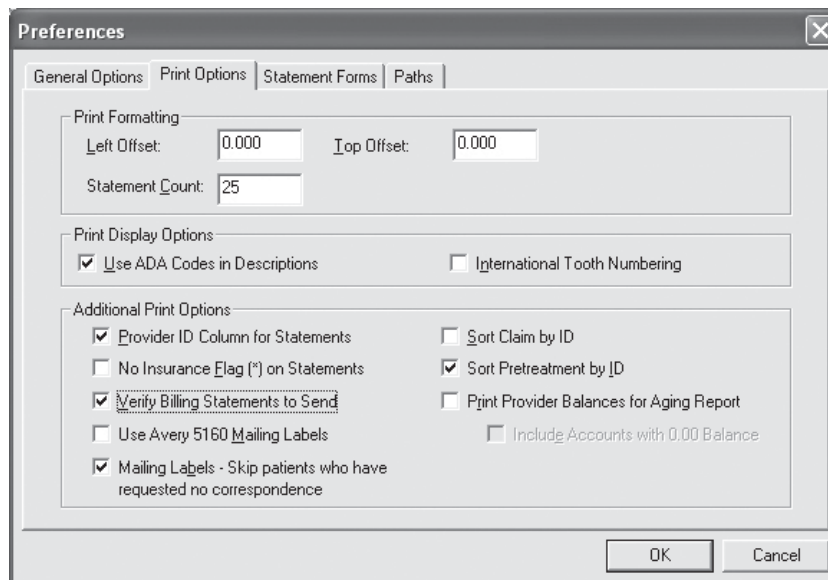
2: Check Verify Billing Statements to Send
Check the box next to Verify Billing Statements to Send.

3: Click OK
Click OK to exit and return to the Reports module.

Generating Statements

Billing Information Options

To select billing options, from the Reports module click Billing Statements. The Billing Statements screen will appear: (See illustration below.)

Statement Date
This defaults to today's date and prints on the billing statements. This is the cut-off date for the statement information.

Balance Forward Date
The Balance Forward Date is the date used to determine which transactions print and which are included in the Balance Forward amount.

Select different optionis from the Billing Statements screen to customize statements for your practice.

Select Account
By default this is <ALL> to <ALL>. You may change this to print a single state-
ment or an alphabetical range for several accounts.

Select Primary Provider
If you have several providers and want to bill these providers separately, you may
choose a single provider or a range of several providers. The provider range causes
statements to print for any account whose account's provider is in the provider
range, regardless of the provider performing the procedures.

Select Billing Type
Billing type is another option to specify accounts that receive billing statements.
Choose a range of billing types and only accounts with the selected billing type will
have a statement printed.

Minimum Balance to Bill
For patients who have a small balance, it may not be cost effective to spend the
time and money to send a billing statement. By using this option, you can specify
that accounts with balances less than a certain amount not be sent a statement.

Include Credit Balances?
If you would like to send billing statements to those guarantors with a credit bal-
ance, this option must be checked. Otherwise, accounts with credit balances will
be excluded from the accounts to receive statements.

Statement Message
Information typed in this box will print on all statements. The number of characters
that will print is limited by the amount of space available on the statement form (5
lines of 90 characters).

Options

These options provide additional filters for which accounts get a statement and
control what information actually prints on the billing statements.

Skip Accounts With Claim Pending
By choosing this option, those accounts with claims outstanding will not receive
a billing statement, providing the estimated Patient Portion is not over the amount
specified under "If Patient Portion Less Than."

For example, if this option is set to $20.00 and a patient has $200.00 worth of claims outstanding and the expected insurance amount is $185.00, the patient will not receive a statement because the estimated Patient Portion is $15.00. However, if the patient has an additional outstanding balance of $10.00 for previous claims which have been paid, the combined Patient Portion would equal $25.00, which is over the $20.00 limit specified, so a statement would be printed.

Include Procs With Claims Pending

If this option is checked, those procedures which are attached to outstanding claims will print on the billing statements, regardless of the Transaction Date and Balance Forward Date. Normally procedures dated before the Balance Forward Date are not itemized on the statement, but included in the Balance Forward amount. If this option is selected, procedures will print until the insurance payment for them is received, and will print if the insurance payment is after the Balance Forward Date to show what has been paid. All procedures attached to a claim have an asterisk (*).

Print Dental Insurance Estimate

By checking this option, Easy Dental will include the total amount of the outstanding balance which is expected from the dental insurance company at the bottom of the statement.

Print Agreed Payment

If this option is checked, Easy Dental determines the amount to print in the "Please Pay" box. This amount is calculated as follows:

> 1) Any outstanding insurance estimate is subtracted from the account balance to get the "Patient Portion."

> 2) The total of any payment plan agreed monthly payments for the account are added for "Pay Plan."

> 3) "Pay Plan" is then compared to "Patient Portion," and the lesser of the two is printed as the "Please Pay" amount. If there are no payment plan agreed monthly payments, the Pay Plan amount is ignored. With this option, if either the Pay Plan or Patient Portion is $0.00, or less than $0.00, the statement will print a "Please Pay" amount of $0.00.

If the "Exclude Outstanding to Insurance" option is checked, the "Please Pay" calculations are slightly different. The Patient Portion is the account balance excluding all procedures outstanding to insurance. The Patient Portion is then compared to the Pay Plan and the lesser of the two is printed as the "Please Pay" amount. If this option is marked and the lesser of the two options is $0.00 (or less than $0.00), a

billing statement will not print for this account.

Print Account Aging
If you want the guarantor's balance to be aged (current, over 30, 60, and 90 days), check this option. Each account's aging is calculated as of the Statement Date.

Allow Credit Card Payment
If your office allows patients to make payments by credit card, check this option. The billing statement will print a place for the credit card #, exp. date, name, and signature on the return portion of the statement.

If Not Billed Since
This option allows you to print statements for accounts that have not been billed since the specified date. The Last Statement Date is displayed in the Ledger. If the Last Statement Date is before the "If Not Billed Since" date, a statement will be printed for the account, providing other statement options do not exclude the account.

Only Bill Accounts Aging
By checking this option you can choose to only have accounts with a balance over the specified aging print. The aging as of the last Month End Update is used to determine whether a statement is printed.

Note: If you would like to use the same options all the time you should mark the options desired in the Billing Statements screen and then check Save as Default. The next time you run Billing Statements your chosen settings will appear as the default.

Easy Dental Billing Statement Options

Easy Dental will generate sixteen different billing statement formats. The type of statement generated depends on what information you select and how you want it formatted. The options that determine what type of statement will be generated are:

- Print Insurance Estimate

- Print Agreed Payment (or print "Please Pay This Amount")

- Print Account Aging (as opposed to account history method: Prior Balance less credits plus charges equals new balance).

- Allow Credit Card Payment

Below are examples of what prints using combinations of the options listed above:

Example 1: Print Agreed Payment, Print Insurance Estimate, Allow Credit Card Payment. Space for the patient to write in their credit card number, expiration date and signature is provided at the top of the statement.

PRIOR BALANCE	CURRENT CREDITS	CURRENT CHARGE	NEW BALANCE	INSURANCE ESTIMATE
	-	+	=	-

PLEASE PAY
THIS AMOUNT

Example 2: Print Agreed Payment, Print Insurance Estimate, Print Account Aging, Allow Credit Card Payment.

CURRENT BALANCE	OVER 30 DAYS	OVER 60 DAYS	OVER 90 DAYS	TOTAL BALANCE	INSURANCE EST.
					-

PLEASE PAY
THIS AMOUNT

Example 3: Print Agreed Payment, Print Account Aging, Allow Credit Card Payment.

CURRENT BALANCE	OVER 30 DAYS	OVER 60 DAYS	OVER 90 DAYS	TOTAL BALANCE

PLEASE PAY
THIS AMOUNT

Example 4: Print Agreed Payment, Allow Credit Card Payment.

PRIOR BALANCE	CURRENT CREDITS	CURRENT CHARGES	NEW BALANCE
	-	+	=

PLEASE PAY
THIS AMOUNT

Example 5: Allow Credit Card Payment.

PRIOR BALANCE	CURRENT CREDITS	CURRENT CHARGES	NEW BALANCE
	-	+	=

Example 6: Print Agreed Payment, Print Insurance Estimate.

PRIOR BALANCE	CURRENT CREDITS	CURRENT CHARGES	NEW BALANCE	INSURANCE ESTIMATE
	-	+	=	-

PLEASE PAY
THIS AMOUNT

Example 7: Print Agreed Payment, Print Insurance Estimate, Print Account Aging.

CURRENT BALANCE	OVER 30 DAYS	OVER 60 DAYS	OVER 90 DAYS	TOTAL BALANCE	INSURANCE EST.
					-

PLEASE PAY
THIS AMOUNT

Example 8: Print Agreed Payment, Print Account Aging.

CURRENT BALANCE	OVER 30 DAYS	OVER 60 DAYS	OVER 90 DAYS	TOTAL BALANCE

PLEASE PAY
THIS AMOUNT

Example 9: Print Agreed Payment.

PRIOR BALANCE	CURRENT CREDITS	CURRENT CHARGES	NEW BALANCE
	-	+	=

PLEASE PAY
THIS AMOUNT

Example 10: Select no options.

PRIOR BALANCE	CURRENT CREDITS	CURRENT CHARGES	NEW BALANCE
	-	+	=

Example 11: Print Insurance Estimate, Allow Credit Card Payment.

PRIOR BALANCE	CURRENT CREDITS	CURRENT CHARGES	NEW BALANCE	INSURANCE ESTIMATE
	-	+	=	-

Example 12: Print Insurance Estimate.

PRIOR BALANCE	CURRENT CREDITS	CURRENT CHARGES	NEW BALANCE	INSURANCE ESTIMATE
	-	+	=	-

Example 13: Print Insurance Estimate, Print Account Aging, Allow Credit Card Payment.

CURRENT BALANCE	OVER 30 DAYS	OVER 60 DAYS	OVER 90 DAYS	TOTAL BALANCE	INSURANCE EST.

Example 14: Print Insurance Estimate, Print Account Aging.

CURRENT BALANCE	OVER 30 DAYS	OVER 60 DAYS	OVER 90 DAYS	TOTAL BALANCE	INSURANCE EST.

Example 15: Print Account Aging, Allow Credit Card Payment.

CURRENT BALANCE	OVER 30 DAYS	OVER 60 DAYS	OVER 90 DAYS	TOTAL BALANCE

Example 16: Print Account Aging

CURRENT BALANCE	OVER 30 DAYS	OVER 60 DAYS	OVER 90 DAYS	TOTAL BALANCE

Creating Billing Statements

1: Click Billing Statements

From the Reports module, click the Billing Statements button. The Billing Statements window will be displayed.

2: Select Billing Options

Select the desired billing options. A detailed summary of each option appears in the previous section - Generating Statements.

3: Click OK

Click the OK button to return to the Reports module. Your billing statements will be listed in the Batch Processor and will have a status of unprinted.

Sending Billing Statements

1: Create Bills
Using the steps above, create your bills and send them to the Batch Processor.

2: Highlight Bills
In the Batch Processor, click once on the line that says Billing Statements. The line will now be highlighted.

3: Click the QuickBill button
On the toolbar click the Electronic Billing Submission button. Choose Selected Billing Statements and click OK. The Statement Verification Screen will appear.
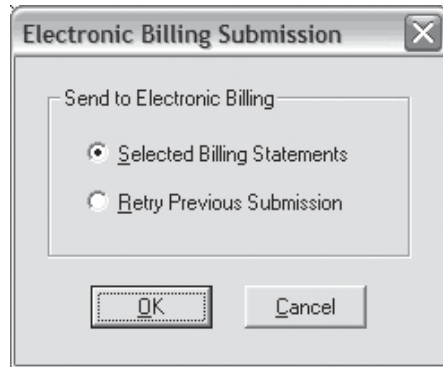
4: Click Verify
Click the Verify button. Click once on any patients who you do not wish to receive a bill. Their names will no longer be highlighted.

Note: To verify which billing statements to send, you must first make sure that the Verify Billing Statements to Send option is selected in Preferences (See Verify Billing Statements to Send).

5: Click OK.
Click the OK button. Depending on the connection option selected during the installation, Easy Dental will dial QuickBill by modem (dial-up) or Easy Dental will launch your Internet access.

6:   Select QuickBill User (Optional)

If you have added more than one QuickBill account, you must select an account with which to process the statements. Click the OK button.
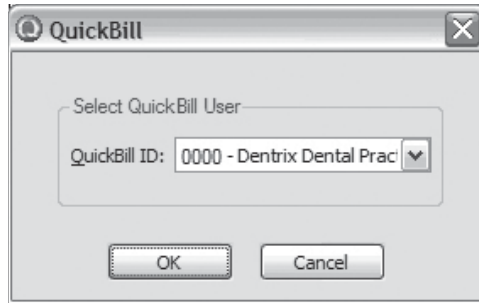
Note: The Select QuickBill User window will only be displayed if multiple accounts are setup.

Easy Dental will then submit your statements to Quick Bill. The screen below will appear showing the progress of the transmission. Click the Show Messages button to display a detailed log of the transmission.
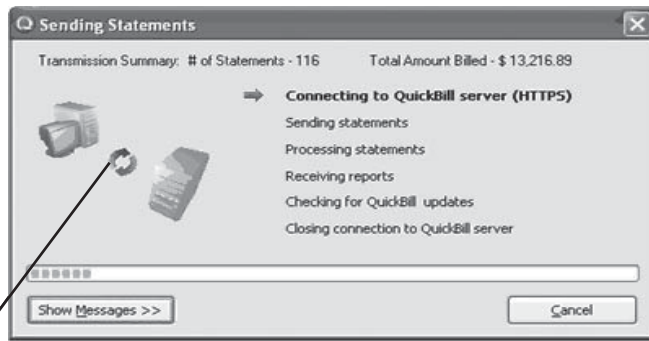
A circle graphic as shown here, indicates that the computer is processing some data to be sent.
A circle with a 'q' indicates that the QuickBill server is processing some data.
A red arrow pointing to the server indicates that data is being uploaded to QuickBill.
A blue arrow pointing to the client computer indicates that data is being received from QuickBill.

When the transmission is complete, a message will appear stating that all statements have been successfully sent and all reports have been received. Two reports will appear in your Batch Processor. (See *QuickBill Reports*).

Retry Previous Submission

A transmission may sometimes be interrupted due to modem problems, etc. The Retry Previous Submission option allows you to send the same statements that were just previously selected and "sent". This is especially helpful if you verify each statement before sending. It is recommended that you call NIS before you resend your statements, if you have any question as to whether the statements have been received. To retry the previous submission:

1:   Click the QuickBill button

On the toolbar click the Electronic Billing Submission button. The Electronic Billing Submission dialog box will appear.

2:   Mark Retry Previous Submission

Mark the Retry Previous Submission option and click OK. The statements that were previously selected and sent will be resent.
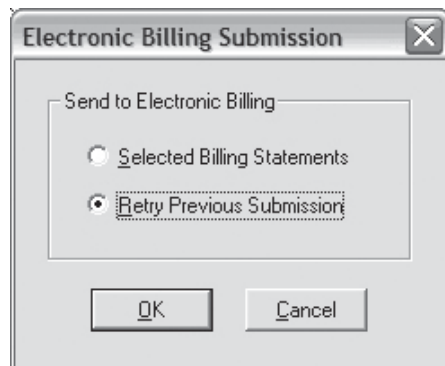
QuickBill Reports

Every time you send billing statements, QuickBill sends two Electronic Billing Transmission Reports.

Electronic Billing Transmission Report #1 lists the number of pages sent to National Information Services and states the charges incurred for the transmission.

Electronic Billing Transmission Report #2 lists the patients billed and the total amount billed to each patient.

These reports can be printed by highlighting the report in the Batch Processor and clicking the Print button on the toolbar.

OR

Display the reports by highlighting the reports in the Batch Processor and clicking the Display button on the toolbar.

Updating QuickBill

Periodically, a new version of QuickBill will be available to download. When this occurs, a message will automatically appear when you connect to the QuickBill server. The following three options are available:
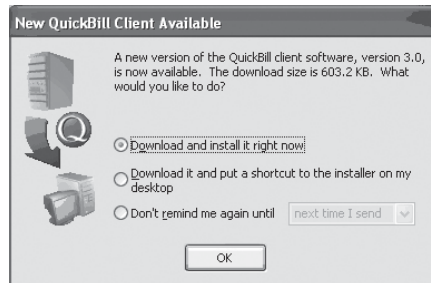
- You can download the build and install it immediately.

- You can download the build and have a shortcut created on your desktop so that you can easily install it at a later time.

- You can choose not to download it at this time and choose when you want to be reminded again.

Click Continue once you select the desired option.