

QuickBill 3.3.7 for Dentrrix

USER'S GUIDE

PUBLICATION DATE

November 2016

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Introduction

QuickBill for Dentrrix can help cut down on the cost and hassle of your monthly billing. QuickBill allows you to create bills as you have always done with Dentrrix. However, instead of printing, folding, licking, and stamping hundreds of bills, QuickBill transmits your bills to Henry Schein Practice Solutions (HSPS) who will take care of your billing for you!

QuickBill is automatically installed with your Dentrrix software. You will need to configure QuickBill to meet the specifics of your practice.

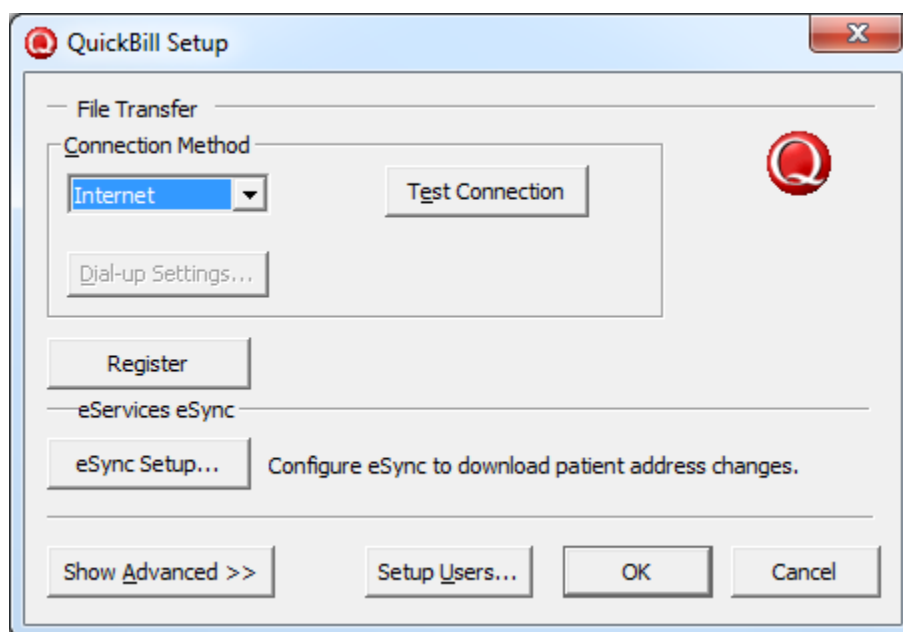
Configuring QuickBill

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. In Office Manager, from the **Maintenance** menu, point to **Practice Setup**, and then click **Electronic Billing Setup**.

Note: You may be asked if you want to sign up for the QuickBill Address Correction Service. Select the desired options, and then click **OK**.

The **QuickBill Setup** dialog box appears.



2. Click the down arrow and choose the desired connection method:
 - **Dial-up** - Allows you to send billing statements to HSPS via modem.
 - **Internet** - Allows you to send billing statements to HSPS through the Internet. (You must have Internet access to use this feature.)

If you select **Dial-up** as your connection method, you must complete the following steps to choose at least one local-access number for QuickBill to dial when sending statements. If you are using an Internet connection, skip to step 3.

- a. Click **Dial-up Settings** to display the **QuickBill Dial-up Settings** dialog box.

- b. Enter your area code.

A list of all applicable local-access numbers for the area code appears.

- c. Select all the local access numbers in your area code.

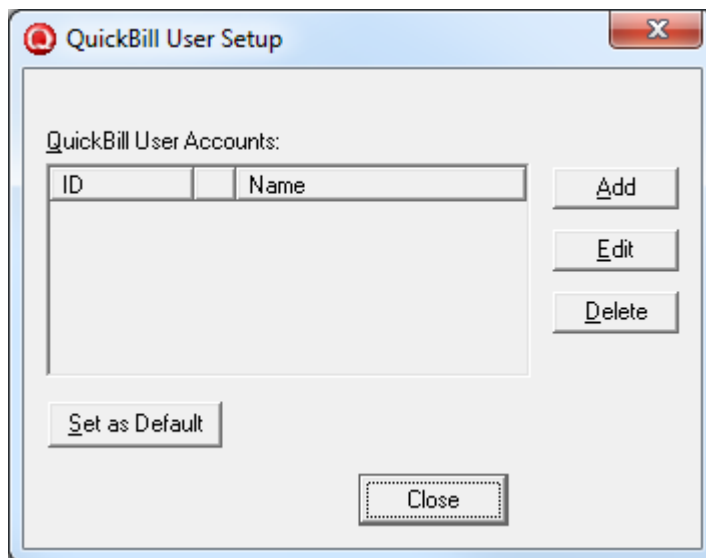
Note:

- You can select multiple area codes by holding the CTRL key while selecting access numbers.
- 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.

- d. Click **OK** to save your dial-up settings.

3. QuickBill allows you to send statements for multiple QuickBill user accounts. To create an account, click **Setup Users**.

The **QuickBill User Setup** dialog box appears.



4. To add your QuickBill user account, click **Add**.

The **QuickBill User - New** dialog box appears.

5. In the **QuickBill ID** field, type your QuickBill ID that was issued to you by HSPS. (If you do not have your QuickBill ID, contact HSPS at (800) 734-5561).
6. In the **Name** field, type the account name (this is used internally with QuickBill software to easily identify the account).
7. In the **New Password** and **Confirm New Password** fields, type the password you want to use for the account. The passwords are case sensitive, and the passwords must match.
8. If you want to include electronic patient newsletters with your statements, select **Include Patient Newsletters**.
9. If you want to be able to include inserts with your statements, select **Include Inserts**.
10. If you want to use the Electronic Address Correction service to verify and correct addresses before sending statements, select that option.
11. To specify the color of your statement paper, select the desired color in the **Statement Color** box.
12. If you want to restrict which credit card types are accepted, select **Accept Credit Cards** and specify which credit card types you will accept.
13. When finished, click **OK** to return to the **QuickBill User Setup** dialog box.

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.

14. Click **Show Advanced** to display settings such as server, port, and QuickBill path. (This will be used for testing purposes only).
15. Click **OK** to save your settings and begin using QuickBill.

Verifying Billing Statements to Send

Normally an office manager will specify 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 you to remove certain patients from the list before statements are sent.

To use the Verify Billing option

1. In Office Manager, from the **Maintenance** menu, point to **Practice Setup**, and then click **Preferences**.
2. Click the **Print Options** tab.

The screenshot shows the 'Preferences' dialog box with the 'Print Options' tab selected. The dialog has four tabs: 'General Options', 'Print Options', 'Statement Forms', and 'Paths'. The 'Print Options' tab contains three sections: 'Print Formatting', 'Print Display Options', and 'Additional Print Options'. In the 'Print Formatting' section, 'Left Offset' is 0, 'Top Offset' is 0, 'Print Delay' is 0, 'Statement Count' is 25, and 'Patient Note Report Count' is 250. In the 'Print Display Options' section, 'Use ADA Codes in Descriptions' and 'International Tooth Numbering' are unchecked. In the 'Additional Print Options' section, 'Verify Billing Statements to Send' is checked, while 'Provider ID Column for Statements', 'No Insurance Flag (*) on Statements', 'Copy Billing Statements to Document Center', 'Use Avery 5160 Mailing Labels', 'Sort Claim by ID', 'Sort Pretreatment by ID', 'Print Provider Balances for Aging Report', and 'Include Accounts with 0.00 Balance' are unchecked. 'Mailing Labels - Skip patients who have requested no correspondence' is checked. At the bottom right are 'OK' and 'Cancel' buttons.

3. Select **Verify Billing Statements to Send**.
4. Click **OK**.

Generating Statements

This section explains the options that are available when generating billing statements and how to use them.

Billing Information Options

You can set several billing information options with your billing statements.

To select billing options

1. From the Office Manager menu bar, point to **Reports**, and then click **Billing**.

The **Billing Statements** dialog box appears.

Billing Statements

Statement Date: 11/23/2016 Balance Forward Date: 10/23/2016

Select Guarantor
From: <ALL> >> To: <ALL> >>

Select Primary Provider
From: <ALL> >> To: <ALL> >>

Select Billing Type:
From: <ALL> >> To: <ALL> >>
Minimum Balance To Bill: 0.01
☐ Include Credit Balances?

Options
☐ Skip Accounts With Claim Pending
 ...If Patient Portion Less Than: 20.00
☐ Include Procs With Claim Pending
☐ Print Dental Insurance Estimate
☐ Print Agreed Payment
☐ Exclude Outstanding To Insurance
☐ Print Due Date on Statements
☒ Only for Payment Agreements/Plans
☐ All: 15 day(s) from Statement Date
☒ Print Practice Information
☐ Print Account Aging
☐ Allow Credit Card Payment
☐ If Not Billed Since: 10/23/2016
☐ Only Bill Accounts Aging: Over 30

Statements:
☒ Batch
☐ Print
☐ Send Electronically

Sort Transaction By:
☒ Patient Name
☐ Date

Select Report Types
☒ Billing Statement
☐ Mailing Labels
 ...Columns: 3

Statement Message:
 Insurance Estimates ("Ins. Est.") and "Please Pay" amounts based on insurance estimates are provided as a courtesy. In the event that your insurance carrier pays less than the estimated amount, you are responsible for the unpaid balance.

Statement Notes

Tired of the hassle of mailing billing statements? Learn how QuickBill can print and mail statements for you.

☐ Save As Default

OK Cancel

2. In the **Billing Statements** dialog box, configure the following options:
 - **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 Guarantor** - By default this is <ALL> to <ALL>. You may change this to print a single statement 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 way to specify accounts that receive billing statements. Only accounts with the selected billing type will have a statement printed.
- **Options:**
 - **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 selected, 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, Dentrix 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, Dentrix 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.
 - **Print Due Date on Statements** - Select this option if you want the payment due date printed on statements.
 - **Print Practice Information** - Select this option to include your practice information on the billing statements.
 - **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.

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

Dentrix can 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:

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

| PRIOR BALANCE | CURRENT CREDITS | CURRENT CHARGE | NEW BALANCE | INSURANCE ESTIMATE |
|------------------------|-----------------|----------------|-------------|--------------------|
| | - | + | = | - |
| PLEASE PAY THIS AMOUNT | | | | |

| 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


To create billing statements

1. In Office Manager, from the **Reports** menu, click **Billing**.
The **Billing Statements** dialog box appears.
2. Select the desired billing options.
For more information, see the previous section, “Generating Statements.”
3. Click **OK**.

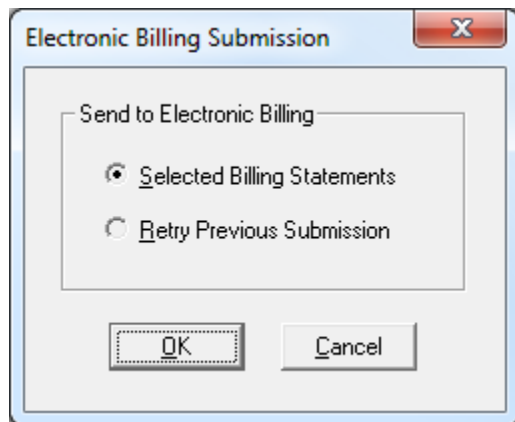
Your billing statements will be listed in the Batch Processor and will have a status of unprinted.

Sending Billing Statements

To send billing statements

1. Using the steps above, create your bills and send them to the Batch Processor.
2. In the Office Manager Batch Processor, click once on the line that says Billing Statements to select it.
3. On the toolbar, click the Electronic Billing Submission button  , click **Selected Billing Statements** and click **OK**.

The **Electronic Billing Submission** dialog box appears.



4. Make sure **Selected Billing Statements** is selected, and then click **OK**.
5. Depending on the connection option selected during the installation, Dentrrix will dial QuickBill by modem (dial-up) or Dentrrix will launch your Internet access.

Note: If you have added more than one QuickBill account, you must select an account with which to process the statements and click **OK**.

Dentrrix 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.

Note: During the transmission, a circle graphic displayed between the two computers 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 appears stating that all statements have been successfully sent and all reports have been received. Two reports will appear in your Batch Processor.

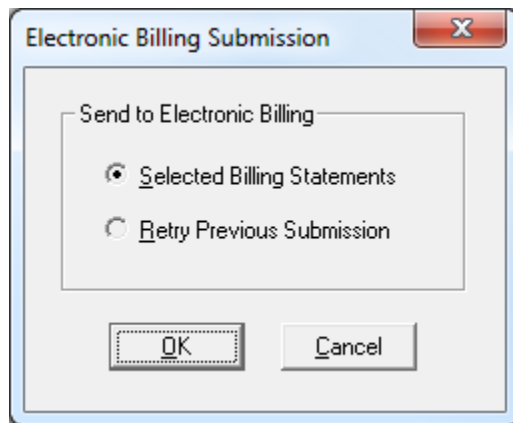
Retry Previous Submission

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 HSPS before you resend your statements, if you have any question as to whether the statements have been received.

To retry the previous submission

1. On the toolbar click the Electronic Billing Submission button.

The **Electronic Billing Submission** dialog box appears.



2. Select 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 selecting the report in the Batch Processor and clicking the Print button on the toolbar. Or you can display the reports by selecting 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:

- **Download and install it right now** - You can download the build and install it immediately.
- **Download it and put a shortcut to the installer on my desktop** - You can download the build and have a shortcut created on your desktop so that you can easily install it at a later time.
- **Don't remind me again until** - 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.