SuccessEHS Dental Check-Out Procedure

Outlines the proper process for processing a Dental patient check-out in the SuccessEHS system

Check-Out

1. Open the **Charge Entry** Module

2. Select your batch. If you are unsure how to find/create a batch, see the steps outlined at the end of this document

3. After selecting your batch, the **Charge Entry** window will open. It is important to verify that you are in the correct batch:

4. Select **View → External Transactions**

5. The **External Charges Summary** window will open

6. Looking at the names in the listing with a status of **NYP** highlight the name of the patient you want to check-out and then select **Link Encounter**
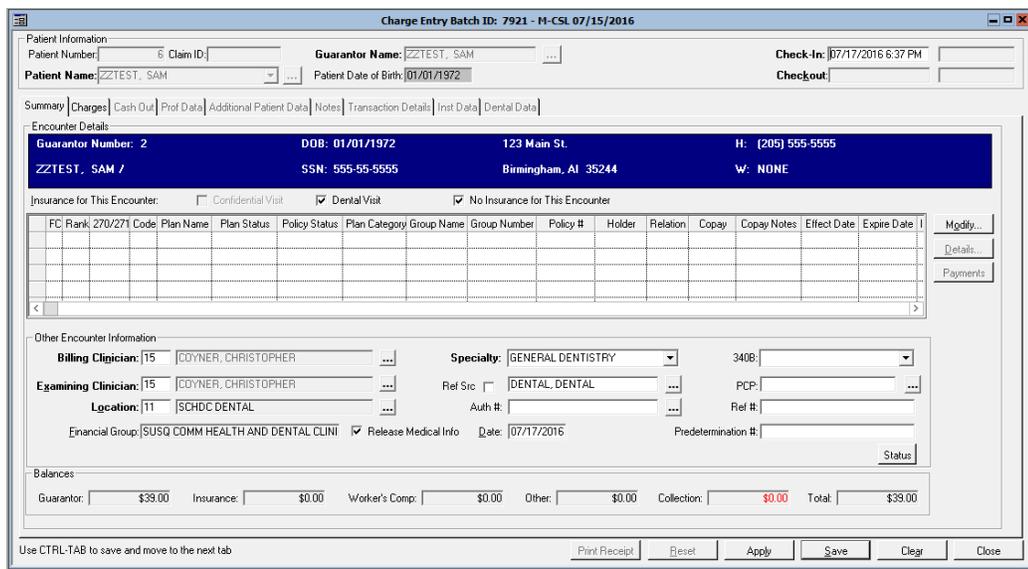
7. The **Find Encounters for Patient** window will open. Highlilght the encounter and select **OK**
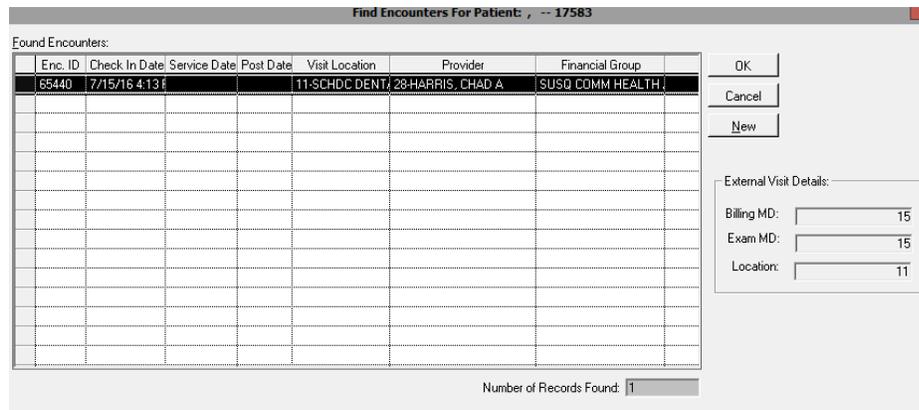
8. The **Charge Entry** window will open with the patient's information

9. Verify that the insurance information is correct (i.e. – Dental Plan and not a Medical Plan). Click on the **Status** button and verify that there is no discount on the encounter if there shouldn't be. For example if a full pay patient is paying for their entire visit today, you can offer them a prompt pay discount and would associate it using the status icon.

10. Ensure the **Billing Clinician, Examining Clinician**, and **Location** are correct. If not, make appropriate corrections

11. Click the **Charges** tab and wait for all Diagnosis Codes and Charges to populate

12. Verify there are no duplicate charges, etc., then select the **Cash Out** tab

13. Collect any payments due (both today's visit and any past guarantor balances). To enter payment double-click in the **Date** field, select the **Type** of payment, and enter the amount of the payment. Print a receipt for the **Patient** and for **Finance**

14. View the **Dental Data** tab and verify any needed information. When complete click **Apply → Save**

15. If the account has a balance and/or charges were due today and the full balance was not collected, you will be required to enter a reason as to why.

16. Verify if the patient/guardian has signed the **No Show Policy.** If not, explain and have the patient/guardian sign acknowledging their understanding. The No Show Policy can be found in **Patient Correspondence**

17. Complete a **Release of Information (ROI)** form for any referrals, as needed. The ROI form can be found in **Patient Correspondence**

18. Based on the check-out slip provided from the clinical staff, schedule the patient for any follow-up appointments, print any referrals, and provide any x-rays as needed.

Find/Create a Batch

1. Open the **Charge Entry** Module

2. Select **Find Now** any batches opened by you will appear

3. If you need to open a new batch, select **New**

4. The **Create New Batch** window will appear

5. Enter **Description** of M or D - Initials and Date

6. Once entered, select **OK**