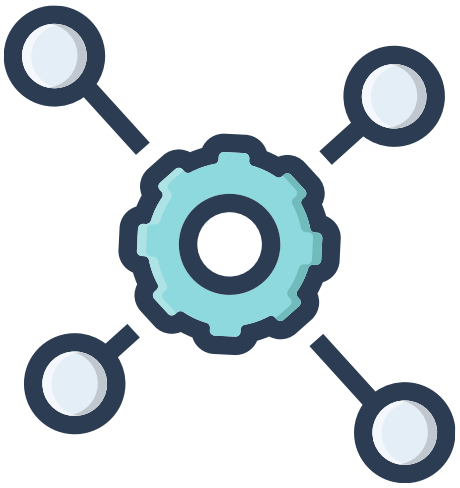
Practice Management Setup

There really isn't a one-size-fits-all model for how to do this, because all practices track metrics, use reports, and pay employees differently.

Here is a list of items you may want to consider when setting up your practice management system prior to enrolling members into your plan.

- Create an **Insurance Company** labeled "Membership Plan"
- Create a patient alert for Membership Plan
  - You can also add an icon to the schedule to identify these patients as well.
- Create an adjustment type for Membership Plan. Some practices may create two, one for hygiene (which will be 100%) and one for treatment (which will be 20%) for more detailed reporting.
- You may want to discuss how these adjustments will impact production and collections before you start using them.

Checkout Procedure



Based on experience this is our recommendation that works well for most practices.

- Most practices use their standard fees.
  - This creates value for the patient because they are always seeing the full value of servcies you are providing on their receipt.
- Post all services to the patient account when completed.
- Upon checkout, use the appropriate credit adjustment to adjust the balance.
  - We would recommend creating that adjustment type to offset either collections or production, depending on which you track on report.
- If it is a recall appointment be sure to adjust 100% so the patient has a zero balance.
- If it is a restorative appointment adjust the appropriate discount and collect the remaining balance from the patient.

PLAN FORWARD