

Practice-Web PW Free Dental Quick Start Basics

Office Setup

- Click on SETUP (Upper left of the main PW Free Dental screen)
- Under PREFERENCES, click on Practice
- Enter Practice information

Add Providers

- Click on LIST (Upper left of the main PW Free Dental screen)
- Click on Providers
- Click on ADD
- Enter Provider information
- Select appointment color, Specialty and Fee Schedule

Appointment Schedule Setup

- Click on SETUP (upper left of the main PW Free Dental screen), under "Schedules", click on "Practice Defaults"
- The default Schedule will appear.
- Click on "Add block" (bottom of page)
- The "Edit Block" dialog will appear.
- In the "Start Time" field, type in the time that your practice opens
- In the "Stop Time" field, type in the time that the lunch break is to start.
- In the "day" field, select the day of week, this time will apply to.
- Click the "OK" button.
- Repeat these instructions for each day of the week your practice is open.

If you do not want to allow for a lunch break then in the "Edit Block" dialog, enter the practice start time in the "Start Time" field and the practice closing time in the "Stop Time" Field and select the day of week in the "Day" field and click on the "OK" button.

Enter Fee Schedule Names

- Click on SETUP (upper left of the main PW Free Dental screen)
- Click on Definitions
- Under Select Category, click on Fee Schedule Name
- Click on ADD
- Enter new fee schedule name
- Click OK

Enter Fees

- Click on LIST (upper left of the main PW Free Dental screen)
- Under Procedure Codes, click on Edit Codes
- Click on the desired code
- Click on the desired fee name (upper right)
- Enter fee, click OK. Repeat for all fee names

Enter Carriers

- Click on LIST (upper left of the main PW Free Dental screen)

- Click on Insurance Carriers
- Click on ADD button (center bottom)
- Enter carrier information, and then click OK.

Add New Account

- Click on FAM (family) button
- Click on Select Patient button (upper left)
- Under Add New Family (lower right), click on ADD
- Populate fields as required, select provider, select fee schedule
- Click OK

Add New Family Member to existing Account

- Go to the family account that you want to add a new family member
- Click on Add Family Member button
- Populate fields as required
- Click OK

Add Insurance Plan to Family Account

- Go to the desired family account
- Click on NEW button (top center below green section)
- Enter the insurance plan information or select from existing plan.
- While entering carrier name, a dropdown will appear to select a carrier or new carrier will automatically entered into carrier table.
- Select the coverage type (Category Percentage, Flat Co-pay/Medicaid or Capitation) and select Fee schedule and form if different from ADA2002.
- Click OK
- If dual insurance applies, then repeat the above steps for the secondary insurance.

Add insurance Plans to each family member

- In the family account, under Family Members dialog (lower right), click on the desired family member
- Click on NEW button (top center below green section)
- In Edit Insurance Coverage under Primary/Ins Plan, select the existing Insurance Plan; select the correct Relationship to Subscriber.
- If dual insurance applies, then when Primary Coverage is completed, go to Secondary/Ins Plan and repeat process.

Enter Tx Plan

- Go to Patient records
- Click on CHART button (left side)
- Click on Add Procedures
- Click on selected procedure
- Enter tooth and/or surfaces if required
- If procedure is for Treatment Plan, leave the procedure status as is. If the procedure is completed, click on Completed.
- Repeat the process until all procedures are entered

Create Insurance Claim

- Go to patient record
- Click on Account button (left side)
- Hold the Ctrl Key down while clicking on the completed procedures for the Ins claim. (the procedures must have same date of service)
- Click on New Claim button (top)
- Click on Send to Queue button (bottom)

Enter Ins Payment

- From the patient's account module, double left click on the claim that is listed on the EOB.
- In the "Payment Amount" field, enter the amount that the EOB has listed for this claim.
- Enter any desired payment notes.
- Click on the "OK" button.
- Repeat this process until all the payments have been made for all the patients that are listed on the EOB.
- After entering the last payment while still in the "Edit Claim" dialog, click on the "Create Ins Check" button.
- Enter the check number.
- Enter the bank/branch number.
- Enter any desired notes.
- Click on the "OK" button.

Enter Patient Payment

- In patient record, click on ACCOUNT
- Click on Payment button (top)
- Populate the fields in the upper left as needed.
- Select a payment type.
- Enter any desired payment notes.
- Click on the "Add" button.
- In the "Amount" field, enter the amount portion of the payment to be applied.
- Click on the "OK" button.

Enter Appointment

- Click on Appointment button (upper left)
- Double left click on the desired time slot
- Double left click on the desired patient from patient list or look patient up by the Search By criteria.
- If you want to enter treatment from the TX Plan to the appointment, hold the Ctrl button down and click on treatment with the status of TX
- Click OK

SEND/PRINT INS CLAIMS

Print Paper Claims

- Click on TOOLS (upper left of the PW Free Dental screen)
- Click on "Send Claims"
- To Print all Claims in queue, click on the "Print" Button
- Click on the "OK" button.
- To Print selected claims that are in queue, hold the "Ctrl" key down on your keyboard and click on the desired claims.
- Once the selected claims are highlighted, click on the "Print" button. Only the selected claims will print.

Send Electronic Claims

- Before sending electronic claims, you must install and configure the Webclaim module or Renaissance Free Claims module and have Internet access.
- Log on to the Internet.
- Click on the "Submit" button.
- The Web-Claim module will open.
- Verify that all the claims to be sent are present.
- To select all claims for transmission, click on the check button (upper left).
- If you do not wish to send all claims, place a check mark on only the claims that are to be sent.
- After all claims have been verified and marked, click on the "Send Claims" button (lower right)