Procedure Categories

Procedure categories can be customized in Datacon in order to facilitate ease of procedure code tracking and reporting. Once a procedure category is created and procedure codes have been specified for it, the category can be tracked as a whole unit. For example, you might want to group all of your restoration procedures into one category so that you can run a transaction analysis report on restoration codes as a group. When running the transaction analysis report, you need only select the procedure category rather than each individual code. Procedure categories can be defined for:

- Charges, payments, or adjustments: Facilitates tracking and reporting.
- Payment types: Allows you to customize how your deposit slip is sorted.
- Specialist schedules: For use when individual doctors in the practice have their own fee schedule.
- Tracking categories: Use to enter, track, and report on information in your system that may not be related to patients, such as hours worked or lab expenses.

Procedure Categories for Charge, Payment, or Adjustment Procedure Codes

First, create the procedure category:

- Click **Procedure Codes** on the *Main Menu.* The *Procedure Codes* screen will open.
- Click **Procedure Categories**. The *Procedure Code Categories* screen will open.
    - For a charge category, click any empty line except the first line in the **Charges** column. Leave the first line blank so you always have the option to leave the category blank on a charge procedure code.
    - For a payment or adjustment category, click any empty line except the first line in the **Payments & Adjustments** column. Leave the first line blank so you always have the option to leave the category blank on a payment or adjustment procedure code.
- Type in the name of your category. For example, **Electronic Pmts**, **E-Ins Payments**, or anything else that you choose for your purposes. See *Figure 1: Procedure Code Categories*.

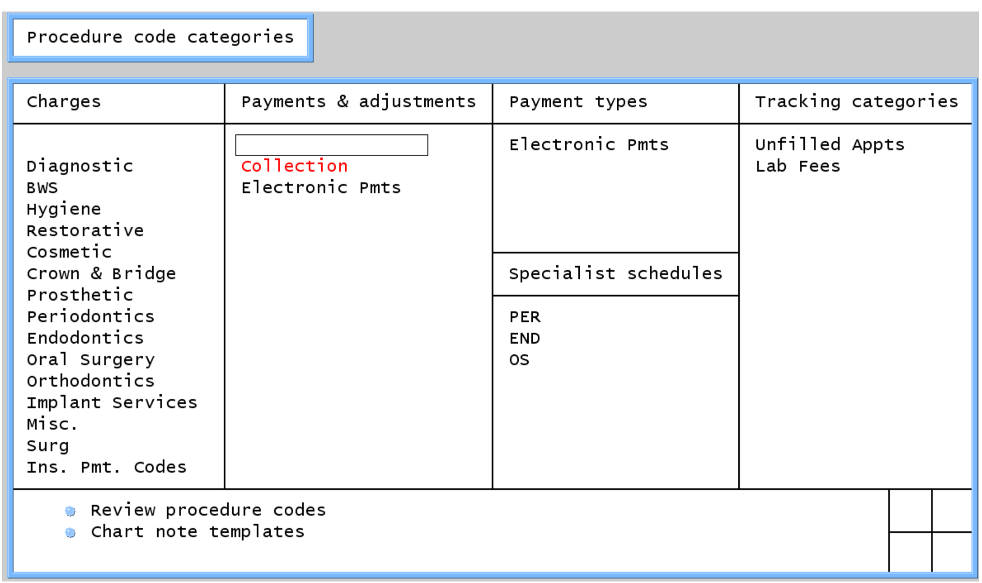

Figure 1: Procedure Code Categories

Next, specify the procedure codes that belong to the category:

- Click **Procedure Codes** on the *Main Menu.* The *Procedure Codes* screen will open.
- Click **Review All Procedures**. The list of all procedure codes will display.
- Click Search to locate the code, or Add to add a new one. The *Procedure Code Details* screen will open.
- Click **Category** and choose the category. See *Figure 2: Procedure Code Details*.

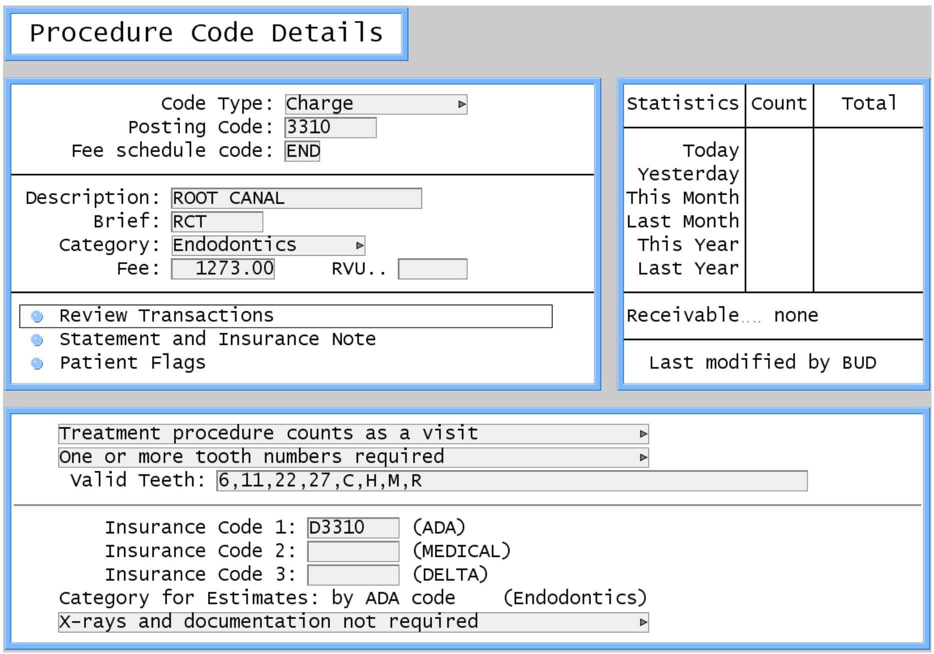

Figure 2: Procedure Code Details

Create a Category for Payment Types

Categories for payment types allow you to customize how your deposit slip is sorted.

First, create the procedure category:

- Click **Procedure Codes** on the *Main Menu.* The *Procedure Codes* screen will open.
- Click **Procedure Categories**. The *Procedure Code Categories* screen will open.
- In the **Payment Types** column, click the first available empty line.
- Type in the name of your category. For example, **Electronic Pmts**, **E-Ins Payments**, or anything else that you choose for your purposes. See *Figure 1: Procedure Code Categories*.

Next, specify the payment procedure codes that belong to the category:

- Click **Procedure Codes** on the *Main Menu.* The *Procedure Codes* screen will open.
- Click **Review All Procedures**. The list of all procedure codes will display.
- Click Search to locate the payment code, or Add to add a new one. The *Procedure Code Details* screen will open.
- To define the category for the deposit slip, in the **Options for Accounting Code** section click the drop-down arrow for **Included in**… and choose the category for the deposit slip.

Create a Specialist Fee Schedule

Specialist fee schedules are used in practices where there are multiple doctors and one or more has their own fee schedule that is different from the office's UCR fee schedule.

First, enter the specialist's fee schedule designation in Procedure Categories:

- Click **Procedure Codes** on the *Main Menu.* The *Procedure Codes* screen will open.
- Click **Procedure Categories**. The *Procedure Code Categories* screen will open.
- Under **Specialist Schedules,** click the first available empty line.
- Type in the fee schedule code designation for your specialist's fee schedule, up to three characters.
- See *Figure 1: Procedure Code Categories*.

Next, add new procedure codes to your system for the specialist's fee schedule.

- Click **Procedure Codes** on the *Main Menu.* The *Procedure Codes* screen will open.
- Click **Review All Procedures**. The list of all procedure codes will display.
- Click Add to add a new procedure code.
- Enter the required information.
    - Set **Fee schedule code** to the specialist's code.
    - See *Figure 2: Procedure Code Details*.

Finally, designate the fee schedule in the doctor's record as appropriate.

- Click **Doctors** on the *Main Menu.* The *Doctors, Hygienists, and Associates* screen will open.
- Click the name of the doctor to specify the fee schedule for, or click Add to add a new doctor.
- Click **Other Options**.
- Enter the fee schedule code in the **Fee Schedule** field and then click the appropriate option from the resulting drop-down list. See *Figure 3: Specify a Fee Schedule for a Doctor*.

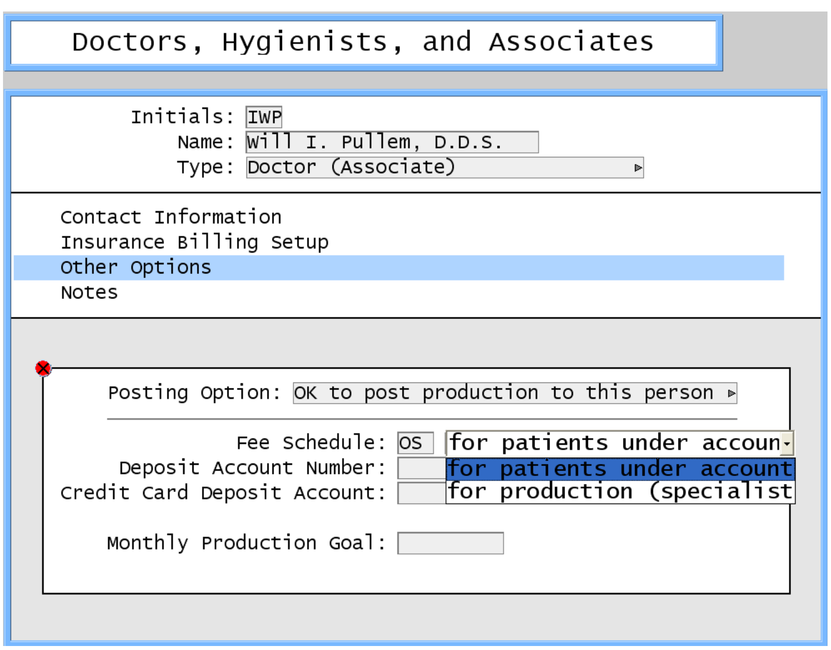

Figure 3: Specify a Fee Schedule for a Doctor

Create a Procedure Category for Tracking

Tracking categories can be created and then used to post information to your system that may not be related to patients; rather, it is needed for practice management. For example, maybe your consultant has asked you to track hours worked or lab expenses. With tracking codes you can post this type of information to your system without affecting your accounts receivables. Once you have entered the information, you can generate reports based on it.

First, create your tracking categories:

- Click **Procedure Codes** on the *Main Menu.* The *Procedure Codes* screen will open.
- Click **Procedure Categories**. The *Procedure Code Categories* screen will open.
- Under **Tracking Categories,** click the first available empty line.
- Type in the tracking category name of your choice. The tracking categories you enter will be available to designate when a new tracking procedure code is added in **Procedure Codes**.

Next, create procedure codes for tracking:

- Click **Procedure Codes** on the *Main Menu.* The *Procedure Codes* screen will open.
- Click **Review All Procedures**. The list of all procedure codes will display.
- Click Add to add a new one.
- Enter the required information.
    - Set **Code Type** to *Tracking code*.
    - Set **Category** to the tracking category you previously created.
    - See *Figure 4: Create a Procedure Code for Tracking*.

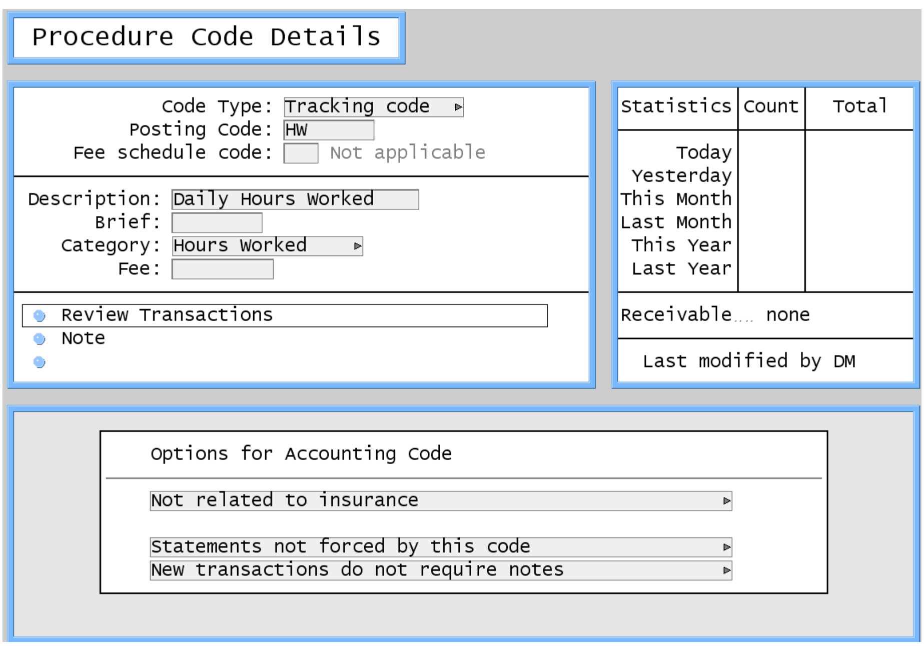

Figure 4: Create a Procedure Code for Tracking

Finally, post the tracking codes:

- Click **Daily Statistics** on the *Main Menu*, and then click the date that you want to post the tracking code to.
- Click **Review transactions posted for day**, then click . The *Post Tracking Code* screen will open. See *Figure 5: Post Tracking Codes*.
- Amounts posted here will not affect your practice's accounts receivable.

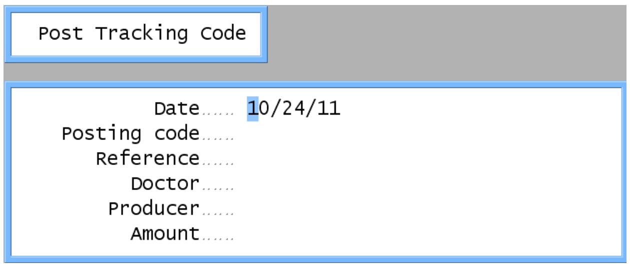

Figure 5: Post Tracking Codes

Questions? Contact the staff at Datacon for help.
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