

# OrthoTrac Software

## Updating Your Procedure Code List

This handout is designed for doctors, office managers, and decision-makers using OrthoTrac practice management software. It provides information on updating your procedure code list. There are three main steps to get started: print your current list of procedure codes; determine which codes need to be added, changed, or removed; and then update your codes.

### Step 1: Printing Your Current List of Procedure Codes

- The Procedure Code Listing report identifies all procedure codes and the configuration of each code.
  - Click Reports > Miscellaneous > Procedures > Listing.
  - Select Active Codes Only and Print in Numeric Order.
- The Bucksheet report lists all procedure codes and their default fees.
  - Click Reports > Miscellaneous > Bucksheet.
  - Select Active Codes Only and Print in Numeric Order.

### Step 2: Determining Which Procedure Codes Need To Be Added, Changed, or Removed

When deciding which procedures codes you need, consider the following criteria:

- Does this procedure have a non-contract charge associated with it?
- Do you want to track how many times this procedure is performed in the office on a monthly and year-to-date basis?
- Do you want to see this procedure description on the printed schedule?
- Does this procedure code need to be documented in treatment notes within Charting?
- Does this procedure move a patient from one status code to another?
- Do you want to post a word processing letter automatically when posting a certain procedure?

If the answer to any of these questions is yes, then that procedure should be included. If the answers to all of these is no, then there is probably a better place to track this procedure. Keep in mind that status codes also work in tracking statistics. It is not necessary to add a procedure code if a status code is already tracking the information you need.

The standard procedure code list uses the numbers 100-998 as codes (the list of standard procedure codes is included at the end of this document). This list has been compiled by hundreds of OrthoTrac users through trial and error, and is highly recommended. You may notice the standard procedure code list has 10 Exam procedure codes. Two of these codes, Exam/Child and Exam/Adult, are attached to the scheduled appointment so they print on the Daily Schedule. This enables the practice to know before the patient is seen if the patient is a child or adult. The remaining eight codes are posted after the patient is seen for the exam, and they indicate the outcome of that exam by changing the patient's status. Exam/Recall/Child changes the status to Observation/Recall. Exam/Child/Pending changes the status to Pending, and so on. If you want to track Child versus Adult exams, you need procedure codes for both.

## Updating Your Procedure Code List Continued. . . .

Assign a three-character code to each procedure you want to include. You may use letters, numbers, or any combination of letters and numbers; however, we recommend using numbers 001-998 because they are easily entered on the number keypad on your keyboard.

After you assign a code to each procedure, add a description of the procedure and any associated charges. After creating your list, make copies of it and use it for several days to make sure you have not forgotten something. Once you are satisfied with your procedure code list, make the changes in the software.

### Step 3: Updating Procedure Codes

#### Adding New Procedure Codes

1. Click **Maintenance/Setup > Procedure Code Maintenance**.
2. In the Procedure Code Maintenance List window, click **Add New**. The Procedure Code Maintenance Details window is displayed.
3. Type the appropriate information in the available fields.
4. Click **OK**.

#### Changing a Procedure Code

1. Click **Maintenance/Setup > Procedure Code Maintenance**.
2. In the Procedure Code Maintenance List window, select the procedure code and click **Change**. The Procedure Code Maintenance Details window is displayed.
3. Update any of the fields that need to be changed.
4. Click **OK**.

**NOTE:** When you change a procedure code, several messages and windows are displayed. When prompted to exit the software, click **OK**, close the window, and then restart the software.

#### Deleting a Procedure Code

1. Click **Maintenance/Setup > Procedure Code Maintenance**.
2. In the Procedure Code Maintenance List window, select the procedure you want to remove and click **Change**.
3. Click **Remove**. If the code was previously posted to a patient, a message is displayed, stating that the code cannot be deleted but will be made inactive to prevent future postings. If the code has never been posted, it is deleted from the software.

### Additional Resources:

For more information about procedure codes, refer to the Help files within the software, or visit the MasterWorks LearnCenter online.

- OrthoTrac Help Files: [Help > OrthoTrac Help](#).
- MasterWorks LearnCenter: [OrthoTrac Software: Getting Started with Procedure Codes Recorded Class](#)

## Updating Your Procedure Code List Continued. . . .

### OrthoTrac Standard Procedure Code List (Sample)

Code	Description	AMT	Code	Description	AMT
100	Exam Child		253	Consult-Recall	
101	Exam Child-Obs Recall		254	Consult-Pending	
102	Exam Child Records		256	Refer to Specialist	
103	Exam Child- Pending		257	Conference	
104	Exam Child-Tx Refused		258	Phone Conference	
105	Exam Adult		259	Final Consult	
106	Exam Adult-Records		300	Imp Funct/Rem Appl	
107	Exam Adult-Pending		301	Imp Fixed Appl	
108	Exam Adult-Tx Refused		302	Imp Retainer	
109	Exam Transfer		303	Imp Retainer-Fee	
110	Exam Transfer-Tx Refused		350	Imp Invisalign	
115	Recall/Obs Check		351	Deliver Aligner - Initial	
116	Recall Ready		352	Check Aligners	
200	Records-Diagnostic		353	Deliver Aligners – Addt'l	
201	Records-Surgical		354	Aligner Refinement	
202	Records-TMJ		355	Deliver Final Aligners	
203	Records- Progress		400	Insert RPE	
204	Records-Final		401	Insert LLA	
205	Records-Invisalign		402	Insert Herbst	
210	Panoramic X-ray		403	Insert Quad Helix	
211	Lateral Cephalometric X-ray		404	Insert Hawley	
212	Frontal Cephalometric X-ray		405	Insert Essix	
213	SMV X-ray		406	Insert Headgear	
214	Tomograph X-ray		407	Insert TPA	
215	Carpal X-ray		408	Insert Splint	
220	Diagnostic Casts		409	Insert Appl-Misc	
221	Mounted Casts		500	Separators	
222	Photographs		502	Band Upper Arch	
250	Consultation		503	Band Lower Arch	
251	Consult-Surgical		504	Band U/L Arch	
252	Consult-Tx Refused		505	Band Addt'l	

## Updating Your Procedure Code List Continued....

OrthoTrac Standard Procedure Code List (Sample--Page 2)

Code	Description	AMT	Code	Description	AMT
520	Full Bond		708	Remove Banded Appliance	
521	Bond Upper Arch		800	Emergency – short	
522	Bond Lower Arch		801	Emergency- long	
523	Bond 2-2 One Arch		802	Loose Band	
524	Bond 2-2 Two Arches		803	Loose Bond	
525	Bond 7's		804	AW/Wire Poke	
526	Bond/Rebo/Repo 1-4 Simple		805	Replace Seps	
527	Bond/Rebo/Repo 1-4 Complex		806	Loose/Broken Appliance	
600	Retie		900	Start-Phase I Tx	
601	AW Change Upper		901	Start-Limited Tx	
602	AW Change Lower		902	Start-Phase II Tx	
603	AW Change U/L		903	Start-Full Tx	
604	Start Elastics		904	Start-Invisalign	
605	Stop Elastics		905	Start-TMJ	
606	Retie/Eval for Deband		906	Start-Retreat	
607	Progress Review		920	Miscellaneous Charge	
609	Check Oral Hygiene		921	Preident	
610	Wires Out		922	Mouthguard	
611	Wires In		923	Electric Toothbrush	
612	Check Appliance		924	Toothbrush Heads	
613	Check Retainer		925	Broken Appointment	
614	Check Retainer-Final				
615	Check Retainer-Fee				
700	Debond UL				
702	Debond Lower Appliance				
703	Deband Phase I				
704	Deband Partial/Limited				
705	Deband Upper				
706	Deband Lower				
707	Deband Full				

