

# PracticeWorks Software

## Cross Settlement: Posting Production Adjustments

This two-page job aid is designed for front office team members who post adjustments and use the Cross Settlement report in PracticeWorks practice management software. This job aid is intended as a quick reference for posting production adjustments.

**IMPORTANT:** Production adjustments must be posted with the initials of each producer that completed the treatment being discounted or adjusted. For more information about adding adjustment codes, refer to the *PRACTICEWORKS Software: Adding Adjustment Codes Job Aid (DPWf1.100.JA1.1)*.

### Posting Production Adjustments at Time of Service

1. In the **Prod** column of the patient's **Check Out Ledger**, select the initials of the producer to whom an adjustment should be posted.
2. Press the **Tab** key.
3. In the **Description** column, enter the appropriate adjustment code.
4. Press the **Tab** key to advance to the **Credits** column (the adjustment will decrease the account's balance).
5. Enter the amount of the adjustment.
6. Press the **Tab** key.
7. Repeat steps 1-6 for each producer whose treatment should be adjusted.

**Check Out Ledger**

Responsible party  
 John Smith Risk: Primary insurance Secondary insurance  
 1234 Happy Lane Insured party John Smith Insured party  
 Atlanta GA 30339 Employer/Plan Happy Plan Employer/Plan  
 D: H: 770-123-4567 Insurance co. Delta Dental Of Insurance co.  
 W1: 800-123-4567 W2: 678-123-4567

Svc Date	Entry Date	Patient	Prod	Description	Charges	Credits	Balance	Ins
08-14-09	08-14-09	John Smith	HYG	01110 (Prophylaxis - Adult )	75.00		75.00	pW
08-14-09	08-14-09	John Smith	HYG	00210 (Full Mouth Series -inc BW)	95.00		170.00	pW
08-14-09	08-14-09	John Smith	DR	00150 (Comprehensive Oral Exam)	55.00		225.00	pW
08-14-09	08-14-09	Account	HYG	DELTAWO		35.00	190.00	
08-14-09	08-14-09	Account	DR	DELTAWO		8.00	182.00	

Patient John Smith Prev balance Above activity New balance Today's acct. Check Out activity  
 1234 Happy Lane Total due 0.00 182.00 182.00 182.00  
 Atlanta GA 30339 Outstanding ins. 0.00 182.00 182.00 182.00  
 H: 770-123-4567 Pay this now 0.00 0.00 0.00 0.00

AR owned by SSS	Cur	30	60	90	120	Ins.	Ptn amt	Past due
	182.00	0.00	0.00	0.00	0.00	182.00	0.00	0.00

Buttons: Remove entry, OK, Suspend, Actions, Cancel, CareCredit, Ins estimate, Eligibility, Ledger history, Prescriptions, Prim details, Sec details

Figure 1 Check Out Ledger

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Phone 800 230 3425 Option 2

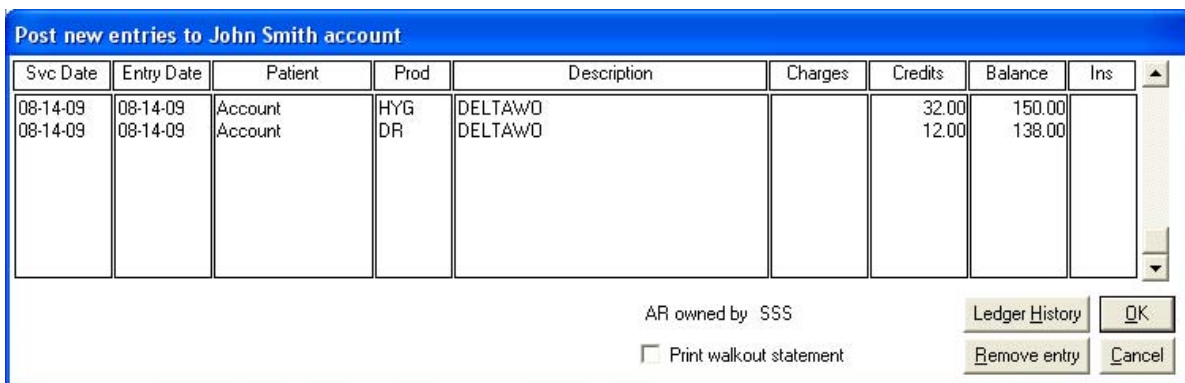
Code DPWf1.501.JA1.1

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## Cross Settlement: Posting Production Adjustments continued ...

### Posting Production Adjustments after Time of Service

1. From the patient's **Ledger Card**, click **Add entry**.
2. In the **Prod** column of the **Post new entries** window, select the initials of the producer to whom an adjustment should be posted.
3. Press the **Tab** key.
4. In the **Description** column, enter the appropriate adjustment code.
5. Press the **Tab** key to advance to the **Credits** column (the adjustment will decrease the account's balance).
6. Enter the amount of the adjustment.
7. Press the **Tab** key.



Svc Date	Entry Date	Patient	Prod	Description	Charges	Credits	Balance	Ins
08-14-09	08-14-09	Account	HYG	DELTAWD		32.00	150.00	
08-14-09	08-14-09	Account	DR	DELTAWD		12.00	138.00	

AR owned by SSS

Print walkout statement

Ledger History OK  
Remove entry Cancel

Figure 2 Post new entries window