

How to Build a Treatment Plan With iMaxX

Table of Contents (Click to Jump to Section)

- 1. How to Build a Treatment Plan
- 2. When iMaxX is Available and Unavailable
- 3. How to Bypass iMaxX
- 4. How to Reselect iMaxX Options
- 5. How to Add a Courtesy
- 6. <u>Treatment Plan Changes after iMaxX Has Been Used</u>
- 7. Insurance Updates After iMaxX Has Been Used

How to Build a Treatment Plan

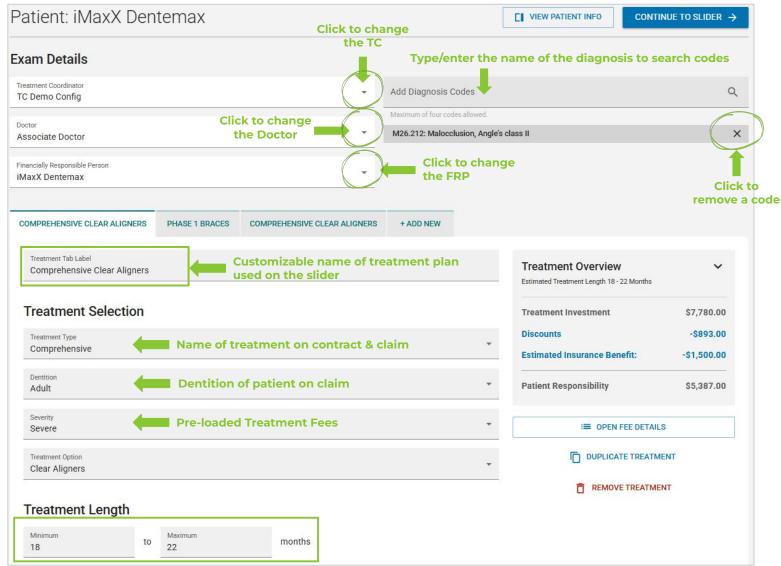
Before You Begin: Confirm the patient record does not exist, and that all forms have been completed and insurance has been verified.

- 1. Review the Cheat Sheet and enter "Treatment Recommended" as the exam result.
- 2. A real-time payment summary will be on the right side.
- 3. iMaxX selections can populate for patients using an in-network carrier, provided all
- 4. necessary criteria are met.

Notes:

- TC + Doctor cannot be changed after contract is signed.
- Your work automatically saves as you go.

How to Build a Treatment Plan (Cont.)



Tx length on claim

iMaxX Availability

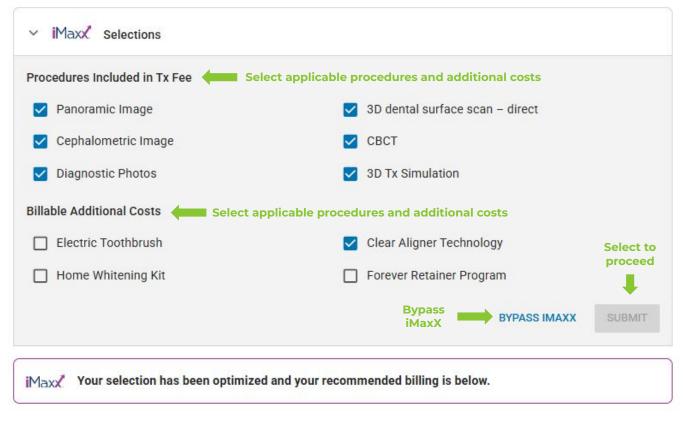
iMaxX Selections for additional costs will populate when all necessary criteria are met. Potential selections include procedures/additional costs that can be included in the treatment fee and other billable costs.

iMaxX will NOT be available in the following circumstances:

- iMaxX was not enabled when the treatment was first created.
- The practice/provider is **out of network** with the patient's insurance carrier.
- Eligibility verification is incomplete for any of the patient's policies.
- Carrier rules are not configured for the patient's carrier.
- The verified policy is a **DHMO** plan.
- A **pre-authorization** is required for one or more of the verified policies.
- The in-network discount is calculated using a **percentage** amount.

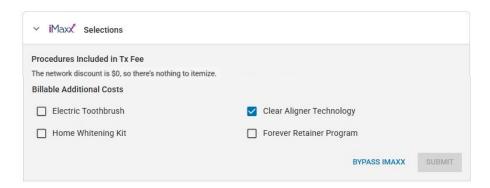


When iMaxX is available:



To bypass iMaxX, click **BYPASS IMAXX** in the iMaxX selections window.

If there is not a network discount based on the treatment selection and/or no procedures permitted to be included in the Tx fee, billable additional costs will still populate for selection, if applicable.



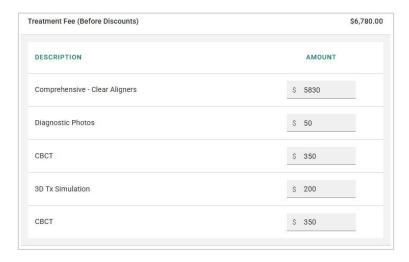
After submitting, iMaxX will optimize your selections to accurately minimize write offs.



To prevent over-itemizing, iMaxX will automatically remove additional costs as needed.



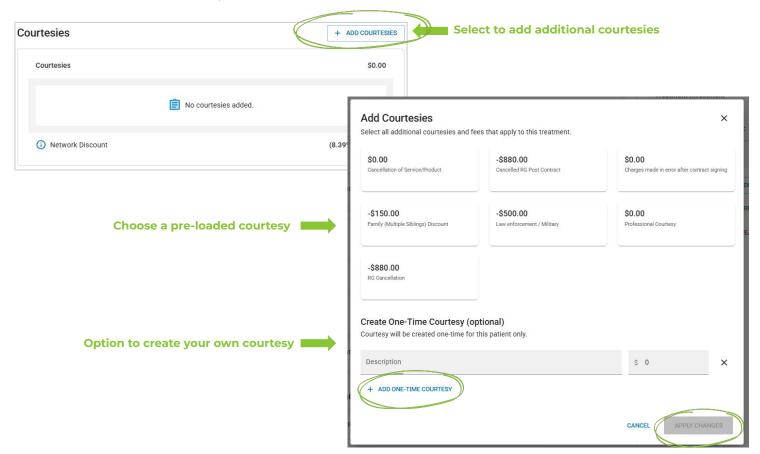
If iMaxX was used, a properly itemized treatment fee will generate.



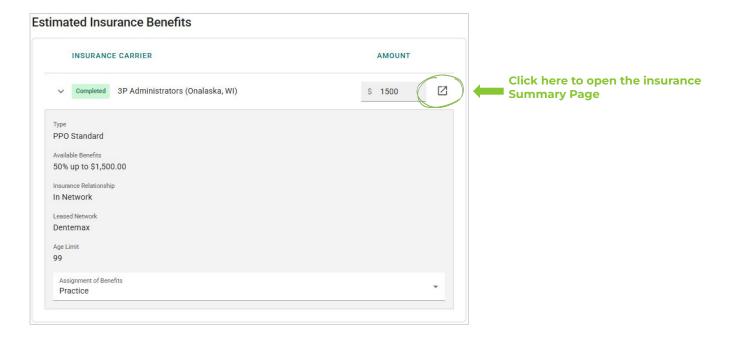
You may return to your iMaxX Selections banner to **reselect, unselect**, **resubmit**, or **bypass** iMaxX to unlock editing fields.



If iMaxX has been utilized, the Total Network Discount will calculate and is not editable.



OrthoFi estimated insurance benefits are calculated on this page based on the treatments selected, benefits verified by OrthoFi, and the Doctor's network relationships with specific carriers.



Treatment Changes After Submitting iMaxX

If treatment selections are changed after submitting iMaxX, all previous iMaxX data will be cleared, and you will be prompted to make your iMaxX selections again.

Insurance Changes

If there are changes to insurance, the system will prompt you to refresh the page. This will clear your cost selections, but courtesies will be retained.

