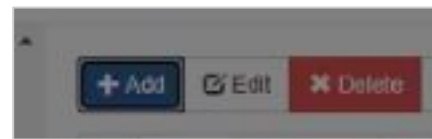
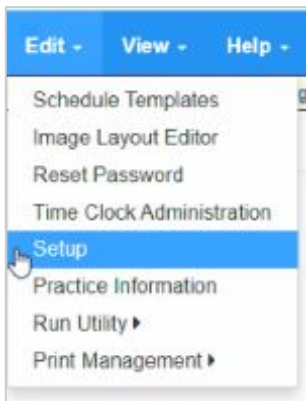


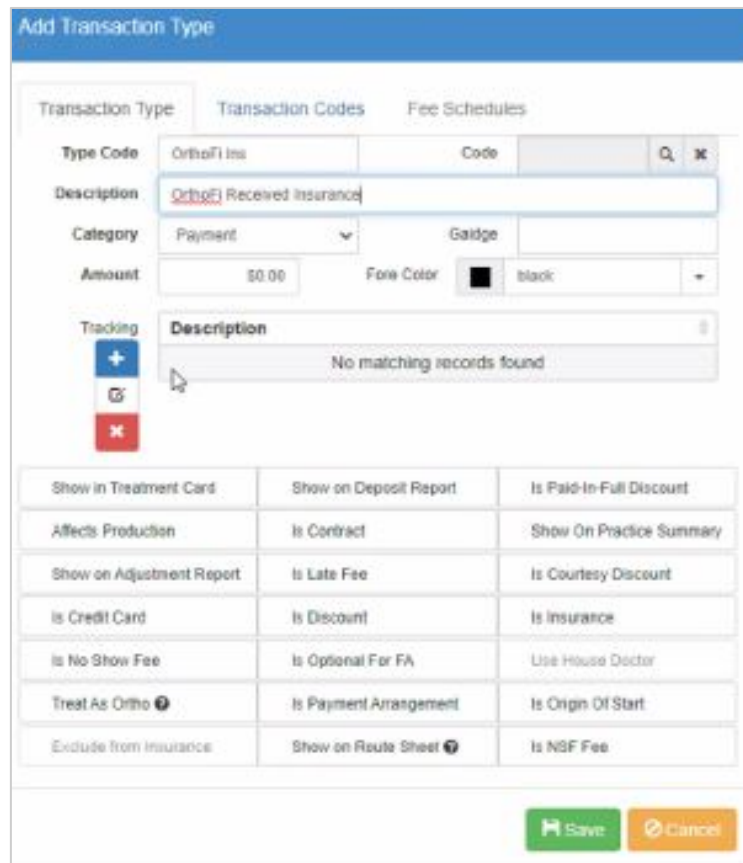
How to Create a New Payment Type in Cloud9

Step by Step Process

1. In the toolbar, click **Edit**, then **Setup**
2. Select **Transaction Types** on the left hand side
3. Click **Add**



4. Fill out per below, then click **Save**.



A screenshot of the 'Add Transaction Type' form. The form has three tabs: 'Transaction Type', 'Transaction Codes', and 'Fee Schedules'. The 'Transaction Type' tab is active. The form contains the following fields and options:

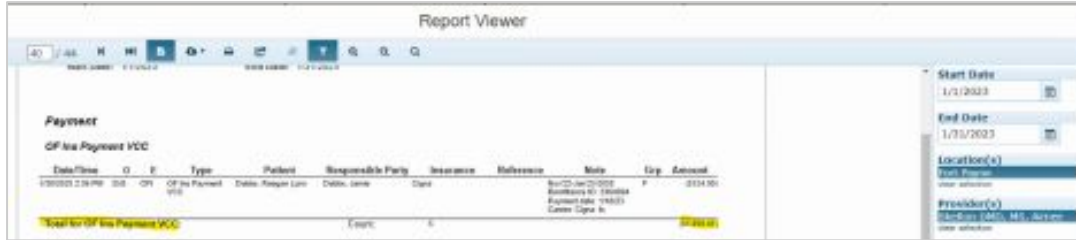
- Type Code:** OrthoFi Ins
- Description:** OrthoFi Received Insurance
- Category:** Payment
- Amount:** \$0.00
- Font Color:** black
- Tracking:** A section with a '+ Add' button, an 'Edit' button, and an 'X Delete' button. Below these buttons is a search box with the text 'No matching records found'.
- Properties Table:** A table with 3 columns and 10 rows of checkboxes.

Show in Treatment Card	Show on Deposit Report	Is Paid-In-Full Discount
Affects Production	Is Contract	Show On Practice Summary
Show on Adjustment Report	Is Late Fee	Is Courtesy Discount
Is Credit Card	Is Discount	Is Insurance
Is No Show Fee	Is Optional For FA	Use House Doctor
Treat As Ortho	Is Payment Arrangement	Is Origin Of Start
Exclude from Insurance	Show on Route Sheet	Is NSF Fee

At the bottom right of the form are two buttons: a green 'Save' button and an orange 'Cancel' button.

Reporting Instructions

1. Select **Reports**, then **Net receipts by date range**
2. Set desired date range > **Run report**
3. Locate OF Insurance payment type and the total amount under that payment type
4. Navigate to the last page to see receipts totals
5. Subtract OF Insurance payment type total from total receipts total for true receipts \$ amount:



Notes to Consider:

- You can run a report to show receipts by payment type, but must select individual dates to include on the report
 - a. **OrthoFi Recommendation:** Run weekly to match OrthoFi deposit date range (ex: Monday through Sunday of a specific week)
 - b. Report **does not** calculate selected date range total but only daily totals. Practice will need to manually calculate daily totals
- Report via date range **does not** have the ability to filter by payment type
- Date posted to the PMSW ledger will not be the same as the date OrthoFi received payment.
- **To properly reconcile:**
 - a. From the OrthoFi dashboard, click **Reports > Admin > Insurance Reconciliation**
 - b. Locate the last posted insurance payment and open up the correlating patient account in Cloud9 to confirm the date the payment was posted
 - c. When running your collections report in Cloud9, make sure the date the last payment was posted is included in the report's date range

Date Posted in PMSW →

Date	Description	Charge	Receipt	Balance	Charge Type	Note
1/05/2023	Check# 50910557	(\$207.78)	(\$215.56)	Receipt - Check	Dec'22 D01 - Remittance ID: 5275974 - Payment Date: 12/13/2022 - Carrier: United Healthcare - 05	
12/13/2022	Check# 13457679	(\$107.78)	(\$307.78)	Receipt - Check		
11/22/2022	Reverse: CRF #6 1527885...	\$215.56	\$0.00	Receipt adjustment		
11/22/2022	CRF #6 1527885T D05 09...	(\$215.56)	(\$215.56)	Receipt - Check		

Date Received by OrthoFi →

Remittance ID	Post Date	Receipt Date	Patient	Account	Physician	Carrier	Charge	Receipt	Status
5275974 EOB	1/13/2023	1/12/2023	Patient Not in OrthoFi	Ava Hilton	Wilson Orthodontics - Michael J. Wilson DDC - Durham	United Healthcare	\$210.56	\$107.78	✓