

Dolphin Management 5.5



Legend Series

Legend Series: Roncone Modules • Zuelke Financial Expert™ • Charlene White's SOS • McLaughlin Dental VTO



Mr. Paul Zuelke

Zuelke Financial Expert™

Created in collaboration with financial expert Mr. Paul Zuelke and his team at Zuelke & Associates, the Zuelke Financial Expert was designed specifically for the Dolphin Management system and is a useful add-on module for any practice. Used in conjunction with Dolphin Management, Zuelke Financial Expert helps you efficiently manage financial delinquencies, account collections, financial situations requiring review, and allows a greater insight to your practice performances and statistics.

Collection Activity

Add Patient Collection Assistant Ledger Patient Financials Insurance Claims Options

Patient: Hackett, Mary

Zuelke Financial Management System

Marla Hackett

Date	Type
1/17/2008	PROMIS
1/17/2008	COMMEM
2/17/2008	PROMIS
3/17/2008	PROMIS
4/17/2008	PROMIS

Load List Select Collection Letter Collection Activity Patient Ledger Documents Print Options

Include Delinquent Accounts BP/INS [ALL] Orthodontists [ALL] Locations [ALL]

Status	Patient	Billing Party	Insurance	Location	Orthodontist	Total Due	Charge Day	Monthly Charge	Phone
<input type="checkbox"/>	Danielle Restrepo	Sera Restrepo		Woodland Hill	Dr. Douglas Imagi	\$150.00	1	\$0.00	(818) 639-1565
<input type="checkbox"/>	Mary Hackett	Marla Hackett		Chatsworth	Dr. Douglas Imagi	\$200.00	1	\$200.00	(818) 369-6709
<input checked="" type="checkbox"/>	Jim Johnson	Jim Johnson		Woodland Hill	Dr. David Manage	\$1,000.00	1	\$400.00	
<input type="checkbox"/>	Madeleine Fitzpatrick	Diana Fitzpatrick		Woodland Hill	Dr. Douglas Imagi	\$200.00	1	\$200.00	(818) 288-5413
<input type="checkbox"/>	Alex Layment	Lauren Layment		Chatsworth	Dr. Douglas Imagi	\$200.00	1	\$200.00	(818) 396-1331
<input type="checkbox"/>	Sophie Pravettoni	Dianne Pravettoni		Chatsworth	Dr. Douglas Imagi	\$110.00	1	\$0.00	(818) 672-9861
<input type="checkbox"/>	Kay Dolence	Kay Dolence	Blue Cross - Blue Shi	Chatsworth	Dr. Douglas Imagi	\$600.00	1	\$125.00	(818) 555-1101
<input type="checkbox"/>	Aaron Hulsh	Jordan Hulsh		Chatsworth	Dr. Douglas Imagi	\$600.00	1	\$200.00	(818) 772-0990
<input type="checkbox"/>	Betsy Meyochas	Martin Lamarque		Woodland Hill	Dr. Douglas Imagi	\$200.00	1	\$200.00	308-0302
<input type="checkbox"/>	Jessica Bruce	Alan Bruce		Chatsworth	Dr. Douglas Imagi	\$400.00	1	\$200.00	(818) 787-3352
<input type="checkbox"/>	Roland Delatre	Roland Delatre		Chatsworth	Dr. Douglas Imagi	\$125.00	0	\$0.00	



Microsoft Partner
Gold Application Development



Account Management Screen

- Easily view accounts that meet specific criteria: days of delinquent, range in days of delinquent, scheduled or unmet "Follow Ups"
- Save custom searches for quick access
- Filter and sort by billing party, insurance balances, specific doctor, or locations

Status	Patient	Responsible Party	Insurance	Delinquent	Account Balance	Due Day	Monthly Charge	Phone
	George Aronow	Thomas Aronow		\$100.00	\$2,100.00	1	\$200.00	(818) 555-1212
	David Aryeh	Martha Aryeh		\$888.00	\$2,668.00	1	\$200.00	(818) 555-1212
	Marla Birge	Walter Birge		\$410.80	\$410.80	1	\$0.00	(818) 555-1212
	Lilly Blankenbecler	Melinda Dolphin		\$90.00	\$90.00	20	\$0.00	(818) 555-1212
	Lilly Blankenbecler	Melinda Dolphin	Blue Cross - Blue Shield	\$380.00	\$1,177.50	20	\$100.00	(818) 555-1212
	Vanessa Duke	Carol Duke		\$3,600.00	\$3,600.00	1	\$0.00	(818) 555-1212
Accounts: 6				\$5,448.80	\$10,046.30			

Account Manager

Collection History Screen

- At-a-glance view of all collection activities for a specific account
- Setup "Follow Ups with \$ Amounts" for delinquent accounts; gives flexibility to arrange equitable payment plans as needed
- Add "Follow Ups without \$" to serve as reminders
- Access Zuelke Collection Letters™ and easily see Collection Letter History
- Activities are tracked and securely logged, and can be accessed only through the proper assigned employee security rights

Entry Date	Employee	Type	Status	Description
2/27/2009	DLPN	Follow Up Without A \$	Pending	2/27/2009 9:00 AM DLPN Call about new job.
2/27/2009	DLPN	Collection Letter	Printed	Zuelke - #3 Letter
2/27/2009	DLPN	Follow Up With A \$	Pending	2/27/2009 9:04 AM DLPN \$90 Follow Up Setup
5/8/2010	DEMO	Comment	LOCKED	Call spoke to Dad; questioned last charge, agreed to it. Will be sending check.

Collection Assistant

Practice Investigator Screen

- Comes pre-loaded with 16 odd or unique financial situations that need to be reviewed
- Search by Billing Party or Insurance
- Sort by billing party, insurance balances, specific doctor, or locations
- Mark accounts as reviewed/make notes explaining the situation

Reason Codes	Patient	Responsible Party	Total Balance	Future Due	Total Due	0-30	31-60	61-90	91+	Monthly Charge
1, 6	George Aronow	Thomas Aronow	\$2,100.00	\$2,000.00	\$100.00	\$100.00	\$0.00	\$0.00	\$0.00	\$200.00
1, 6	Caroline McConnell	Todd McConnell	\$3,900.00	\$4,100.00	(\$200.00)	(\$200.00)	\$0.00	\$0.00	\$0.00	\$125.00
6	Katherine Nancy	Richard Nancy	\$2,200.00	\$2,000.00	\$200.00	\$0.00	\$0.00	\$0.00	\$200.00	\$200.00
6	Nina Coulter	David Coulter	\$5,800.00	\$4,800.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$400.00
6	Alex Layment	Lauren Layment	\$1,000.00	\$800.00	\$200.00	\$200.00	\$0.00	\$0.00	\$0.00	\$200.00
9	Mary Tanner	Harry Tanner	\$110.00	\$0.00	\$110.00	\$110.00	\$0.00	\$0.00	\$0.00	\$0.00
9	Sammy Berwin	Marc Berwin	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
1, 6	Madeleine Fitzpatrick	Diana Fitzpatrick	\$2,800.00	\$2,600.00	\$200.00	\$0.00	\$0.00	\$0.00	\$200.00	\$200.00
9	Bridget Jones	Allen Jones	\$260.00	\$0.00	\$260.00	\$110.00	\$150.00	\$0.00	\$0.00	\$0.00
6	Mahtab Lo	Marc Lo	\$1,015.00	\$400.00	\$615.00	\$215.00	\$200.00	\$0.00	\$200.00	\$200.00
1, 6	Aaron Hulsh	Jordan Hulsh	\$3,215.00	\$2,600.00	\$615.00	\$215.00	\$200.00	\$0.00	\$200.00	\$200.00

Practice Investigator

Enhanced Reporting

- Additions to the existing library of Dolphin Management reports, which provide key practice information and better insight into key practice statistics, include:
 - Zuelke Practice Monitor
 - Case Start Tracking Forms
 - Monthly New Patient Exam report

Zuelke Statement Templates™ and Zuelke Collection Letters

- Newly designed patient statements based on Mr. Zuelke's recommendations; available in electronic version through Emdeon (www.emdeon.com)
- The complete suite of Zuelke Collection Letters are included, plus detailed explanations of when to use each Zuelke Collection Letter