Dentrix Overview

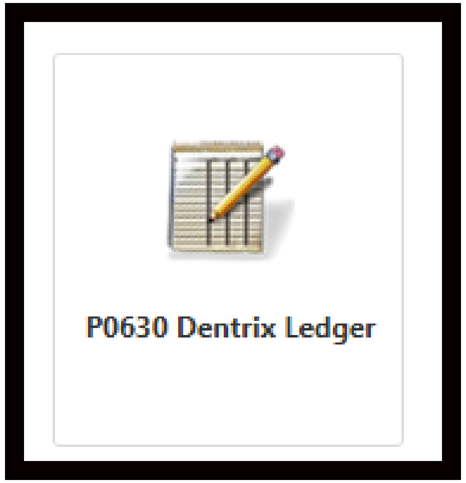
MAY 2026

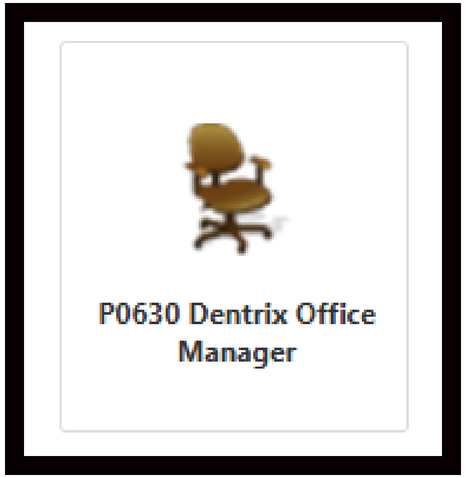
Agenda

- What is Dentrix
- How to Get Access to Dentrix
- Dentrix Ledger vs. Dentrix Office Manager
- Overview of Dentrix Ledger
- Helpful Handouts for Dentrix
- MHS Genesis 1DOD Dental Workflows
- Workflows
  - Identifying Billable Encounters
  - Messaging Center
  - Searching for a Patient
  - Document Center
  - Adding Dental Insurance
  - Creating a Dental Claim
  - Posting Payments and Adjustments
  - Generating a Billing Statement

What is Dentrix?

- Dentrix is the dental billing solution utilized within the MHS Genesis electronic health record system.
- Dentrix Ledger vs. Dentrix Office Manager:
  - **The Dentrix Ledger** is where patient accounts and billing activities are managed, including claim creation, posting of payments and adjustments, and patient statement creation.
  - **The Dentrix Office Manager** is the “home page” for the Dentrix module. Within the Office Manager, you can see the batch processor and view document previews for your facility.
    - For example, if a statement is generated from the Dentrix Ledger and sent to batch, it will be visible from Dentrix Office Manager and the print preview can be viewed.



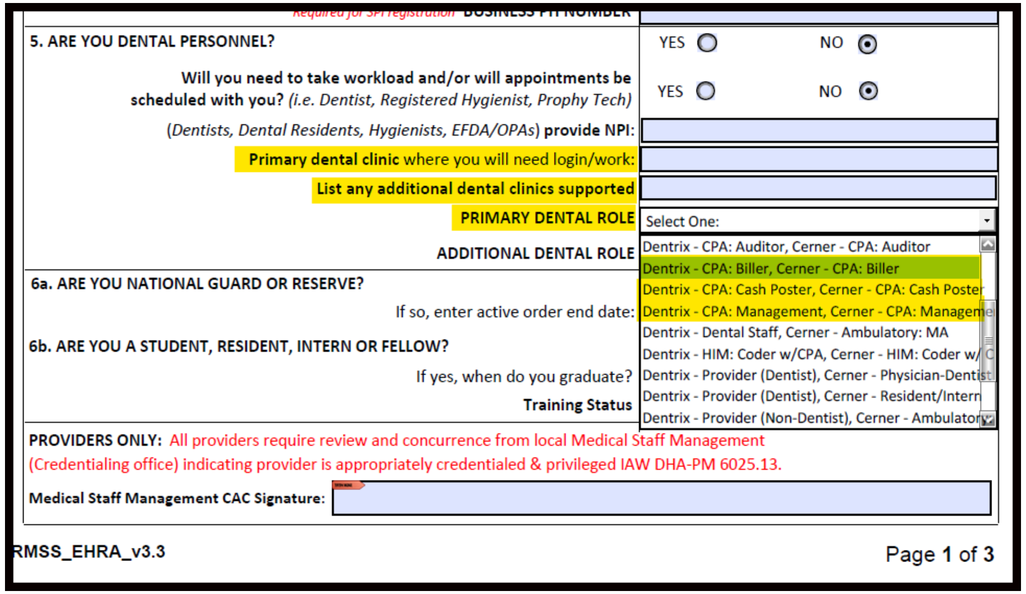


How To Get Access to Dentrix

- Complete the IRRMSS_EHR Application Modification Form

Adobe Acrobat Document

- Route to Local Trainer Role Manager
  - TRM assigns CBT in JKO then Instructor Led Training
  - After completion of training, Access will be granted to Dentrix



5. ARE YOU DENTAL PERSONNEL? YES NO

Will you need to take workload and/or will appointments be scheduled with you? *(i.e. Dentist, Registered Hygienist, Prophy Tech)* YES NO

(Dentists, Dental Residents, Hygienists, EFDA/OPAs) provide NPI:

Primary dental clinic where you will need login/work:

List any additional dental clinics supported

PRIMARY DENTAL ROLE Select One:

ADDITIONAL DENTAL ROLE

Dentrix - CPA: Auditor, Cerner - CPA: Auditor
Dentrix - CPA: Biller, Cerner - CPA: Biller
Dentrix - CPA: Cash Poster, Cerner - CPA: Cash Poster
Dentrix - CPA: Management, Cerner - CPA: Manageme
Dentrix - Dental Staff, Cerner - Ambulatory: MA
Dentrix - HIM: Coder w/CPA, Cerner - HIM: Coder w/C
Dentrix - Provider (Dentist), Cerner - Physician-Dentist
Dentrix - Provider (Dentist), Cerner - Resident/Intern
Dentrix - Provider (Non-Dentist), Cerner - Ambulator

6a. ARE YOU NATIONAL GUARD OR RESERVE?

If so, enter active order end date:

6b. ARE YOU A STUDENT, RESIDENT, INTERN OR FELLOW?

If yes, when do you graduate?

Training Status

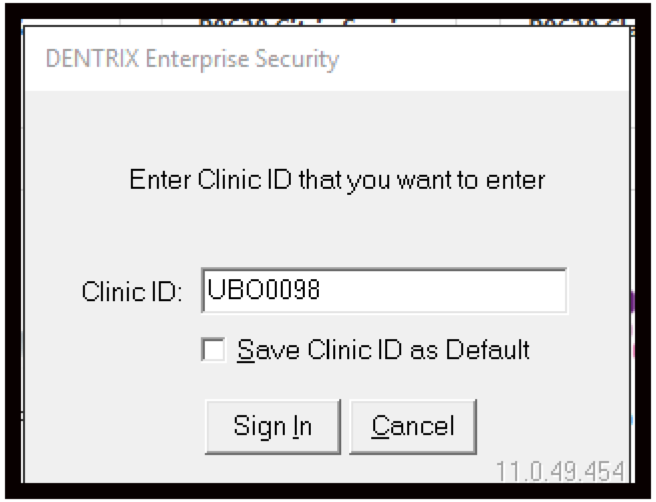
PROVIDERS ONLY: All providers require review and concurrence from local Medical Staff Management (Credentialing office) indicating provider is appropriately credentialed & privileged IAW DHA-PM 6025.13.

Medical Staff Management CAC Signature:

RMSS_EHRA_v3.3 Page 1 of 3

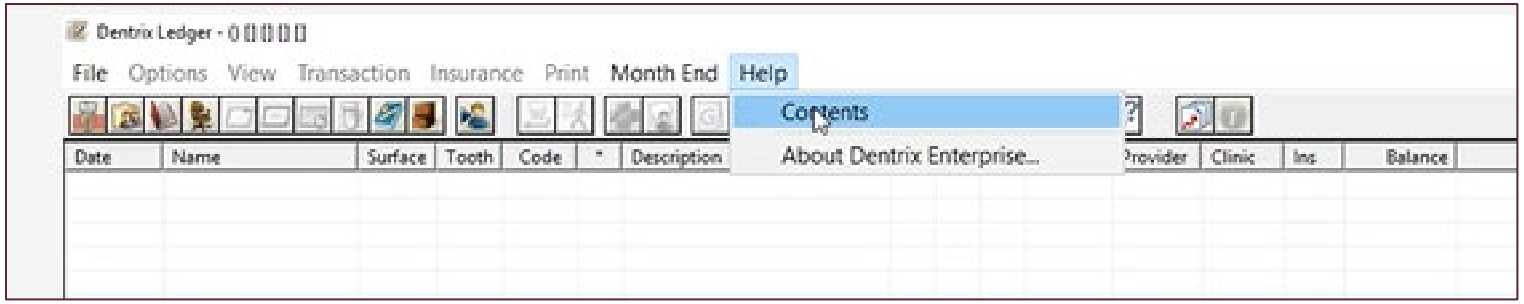
How to Access Dentrix

- Dentrix can be accessed from the Citrix storefront.
  - Citrix Storefront link
- To log in, type in your Clinic ID and click Sign In.
  - Note: Your Clinic ID will be "UBO" followed by your site DMIS ID (Ex: UBO0098)

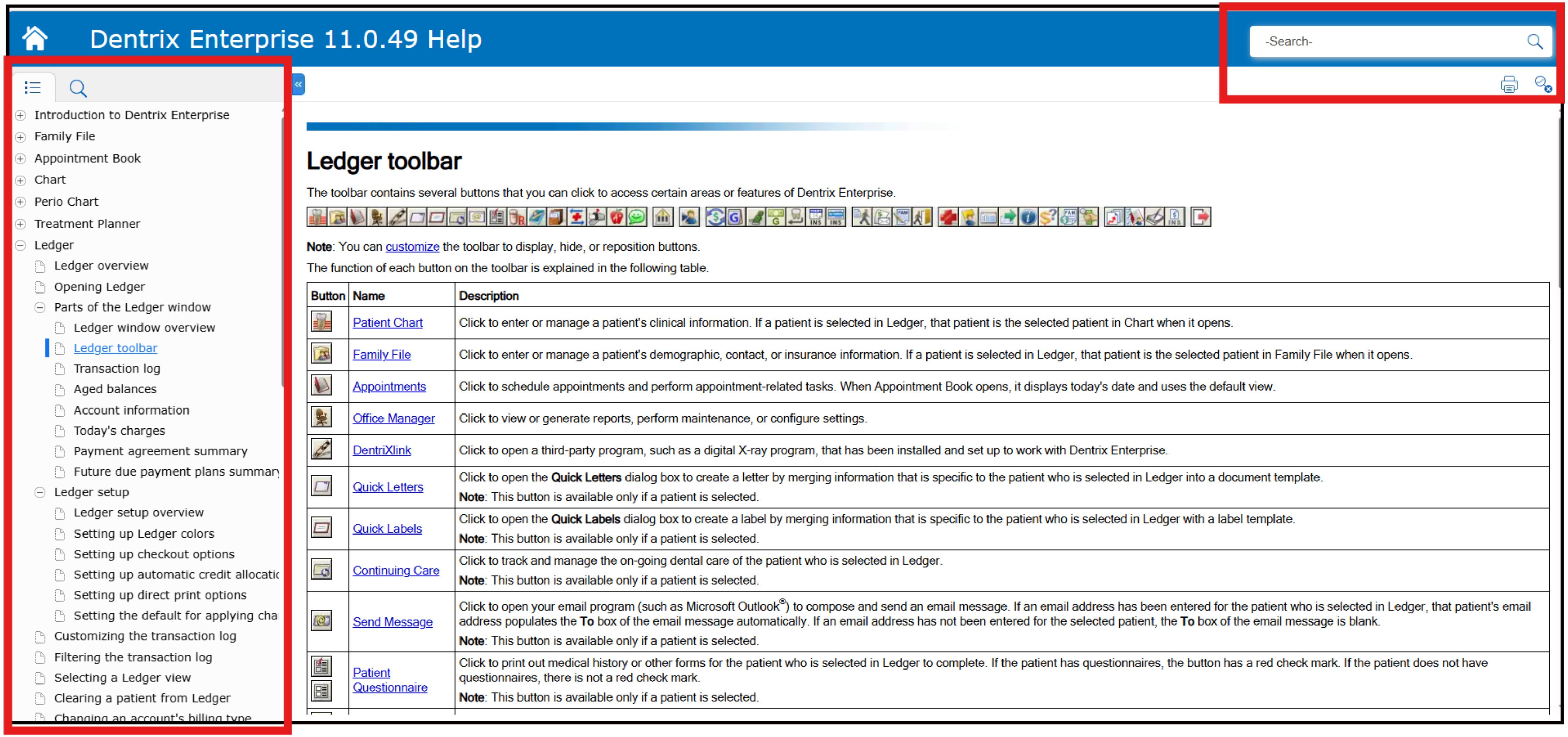


Dentrix Resources

- Within the Dentrix Ledger, select Help > Contents from the menu bar.
  - Similar to the "Learning Live" function in PowerChart, the Contents option will bring you to a library of tip sheets on various Dentrix processes.
  - This will be the link to the **helpful handouts for Dentrix end users!**
    - https://hsps.pro/DentrixEnterprise/Help_11.0.49/index.htm#t=mergedProjects%2FFamily_File%2FInsurance_information%2FDental%2FAttaching_a_new_dental_insurance_plan_to_a_subscriber.htm



Overview of Dentrix Helpful Content



Dentrix Enterprise 11.0.49 Help

-Search-

Introduction to Dentrix Enterprise
Family File
Appointment Book
Chart
Perio Chart
Treatment Planner
Ledger
Ledger overview
Opening Ledger
Parts of the Ledger window
Ledger window overview
Ledger toolbar
Transaction log
Aged balances
Account information
Today's charges
Payment agreement summary
Future due payment plans summary
Ledger setup
Ledger setup overview
Setting up Ledger colors
Setting up checkout options
Setting up automatic credit allocati
Setting up direct print options
Setting the default for applying cha
Customizing the transaction log
Filtering the transaction log
Selecting a Ledger view
Clearing a patient from Ledger
Changing an account's billing type

Ledger toolbar

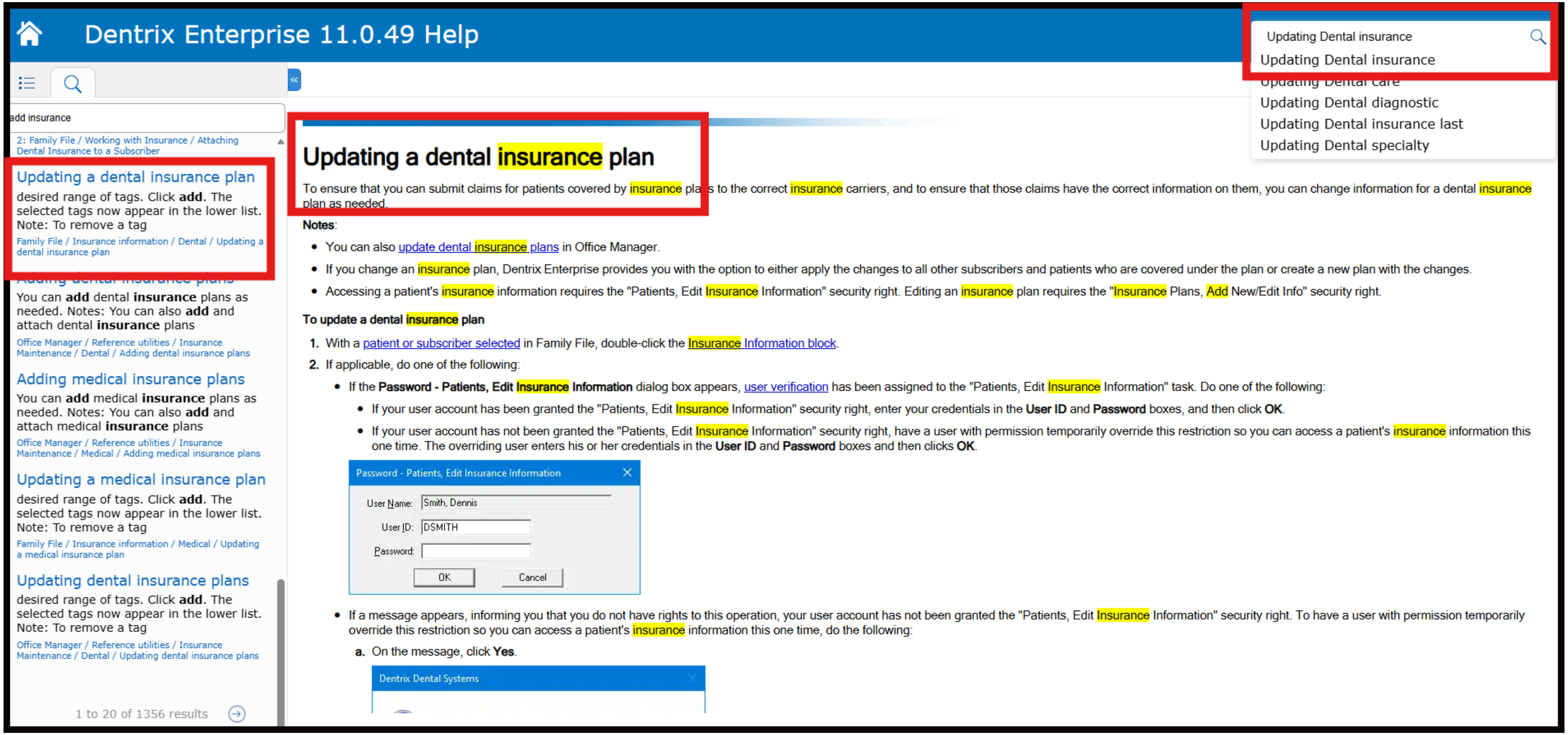
The toolbar contains several buttons that you can click to access certain areas or features of Dentrix Enterprise.

Note: You can customize the toolbar to display, hide, or reposition buttons.

The function of each button on the toolbar is explained in the following table.

Button	Name	Description
	Patient Chart	Click to enter or manage a patient's clinical information. If a patient is selected in Ledger, that patient is the selected patient in Chart when it opens.
	Family File	Click to enter or manage a patient's demographic, contact, or insurance information. If a patient is selected in Ledger, that patient is the selected patient in Family File when it opens.
	Appointments	Click to schedule appointments and perform appointment-related tasks. When Appointment Book opens, it displays today's date and uses the default view.
	Office Manager	Click to view or generate reports, perform maintenance, or configure settings.
	DentriXlink	Click to open a third-party program, such as a digital X-ray program, that has been installed and set up to work with Dentrix Enterprise.
	Quick Letters	Click to open the **Quick Letters** dialog box to create a letter by merging information that is specific to the patient who is selected in Ledger into a document template. **Note**: This button is available only if a patient is selected.
	Quick Labels	Click to open the **Quick Labels** dialog box to create a label by merging information that is specific to the patient who is selected in Ledger with a label template. **Note**: This button is available only if a patient is selected.
	Continuing Care	Click to track and manage the on-going dental care of the patient who is selected in Ledger. **Note**: This button is available only if a patient is selected.
	Send Message	Click to open your email program (such as Microsoft Outlook®) to compose and send an email message. If an email address has been entered for the patient who is selected in Ledger, that patient's email address populates the **To** box of the email message automatically. If an email address has not been entered for the selected patient, the **To** box of the email message is blank. **Note**: This button is available only if a patient is selected.
	Patient Questionnaire	Click to print out medical history or other forms for the patient who is selected in Ledger to complete. If the patient has questionnaires, the button has a red check mark. If the patient does not have questionnaires, there is not a red check mark. **Note**: This button is available only if a patient is selected.

Dentrix Helpful Content - Search Function



Dentrix Enterprise 11.0.49 Help

Updating Dental insurance

Updating Dental insurance
Updating Dental care
Updating Dental diagnostic
Updating Dental insurance last
Updating Dental specialty

add insurance

2: Family File / Working with Insurance / Attaching Dental Insurance to a Subscriber

Updating a dental insurance plan
desired range of tags. Click **add**. The selected tags now appear in the lower list. Note: To remove a tag
Family File / Insurance information / Dental / Updating a dental insurance plan

Adding dental insurance plans
You can **add** dental **insurance** plans as needed. Notes: You can also **add** and attach dental **insurance** plans
Office Manager / Reference utilities / Insurance Maintenance / Dental / Adding dental insurance plans

Adding medical insurance plans
You can **add** medical **insurance** plans as needed. Notes: You can also **add** and attach medical **insurance** plans
Office Manager / Reference utilities / Insurance Maintenance / Medical / Adding medical insurance plans

Updating a medical insurance plan
desired range of tags. Click **add**. The selected tags now appear in the lower list. Note: To remove a tag
Family File / Insurance information / Medical / Updating a medical insurance plan

Updating dental insurance plans
desired range of tags. Click **add**. The selected tags now appear in the lower list. Note: To remove a tag
Office Manager / Reference utilities / Insurance Maintenance / Dental / Updating dental insurance plans

1 to 20 of 1356 results

Updating a dental insurance plan

To ensure that you can submit claims for patients covered by insurance plans to the correct insurance carriers, and to ensure that those claims have the correct information on them, you can change information for a dental insurance plan as needed.

Notes:

- You can also update dental insurance plans in Office Manager.
- If you change an insurance plan, Dentrix Enterprise provides you with the option to either apply the changes to all other subscribers and patients who are covered under the plan or create a new plan with the changes.
- Accessing a patient's insurance information requires the "Patients, Edit Insurance Information" security right. Editing an insurance plan requires the "Insurance Plans, Add New/Edit Info" security right.

To update a dental insurance plan

1. With a patient or subscriber selected in Family File, double-click the Insurance Information block.
2. If applicable, do one of the following:
   - If the **Password - Patients, Edit Insurance Information** dialog box appears, user verification has been assigned to the "Patients, Edit Insurance Information" task. Do one of the following:
     - If your user account has been granted the "Patients, Edit Insurance Information" security right, enter your credentials in the **User ID** and **Password** boxes, and then click **OK**.
     - If your user account has not been granted the "Patients, Edit Insurance Information" security right, have a user with permission temporarily override this restriction so you can access a patient's insurance information this one time. The overriding user enters his or her credentials in the **User ID** and **Password** boxes and then clicks **OK**.

Password - Patients, Edit Insurance Information

User Name: Smith, Dennis
User ID: DSMITH
Password:
OK Cancel

   - If a message appears, informing you that you do not have rights to this operation, your user account has not been granted the "Patients, Edit Insurance Information" security right. To have a user with permission temporarily override this restriction so you can access a patient's insurance information this one time, do the following:
     a. On the message, click **Yes**.

Dentrix Dental Systems

1DOD Dental Workflows

MHS Genesis Workflow Library Link

- **Message Center, Patient Documents, and Demographics**
  - 1DOD – Dental – Insurance Claims Generation, Review, and Submission (Patient Accounting)
  - 1DOD – Dental – Manage Message Center
  - 1DOD – Dental – Add or Modify a Dental Health Plan (Patient Accounting)

- **Claims, Insurance Payments, Adjustments, and Statements**
  - 1DOD – Dental – Insurance Claims Generation, Review, and Submission (Patient Accounting)
  - 1DOD – Dental – Insurance Payment Processing and Posting (Patient Accounting)
  - 1DOD – Dental – Insurance Batch Payment Posting (Patient Accounting)
  - 1DOD – Dental – Applying Debit and Credit Adjustments (Patient Accounting)
  - 1DOD – Dental – Insurance Payment Processing and Posting (Patient Accounting)
  - 1DOD – Dental – Applying Debit and Credit Adjustments (Patient Accounting)
  - 1DOD – Dental – Insurance Payment Processing and Posting (Patient Accounting)
  - 1DOD – Dental – Patient Billing Statement Generation (Patient Accounting)

1DOD Dental Workflows (continued)

[MHS Genesis Workflow Library Link]

- **Patient Payments, Non-Covered Procedures, and Payment Plans**
  - 1DOD – Dental – Elective (Non-Covered) Dental Procedure – Billable (Patient Accounting)
  - 1DOD – Dental – Self-Pay and Patient Balance Posting (Patient Accounting)

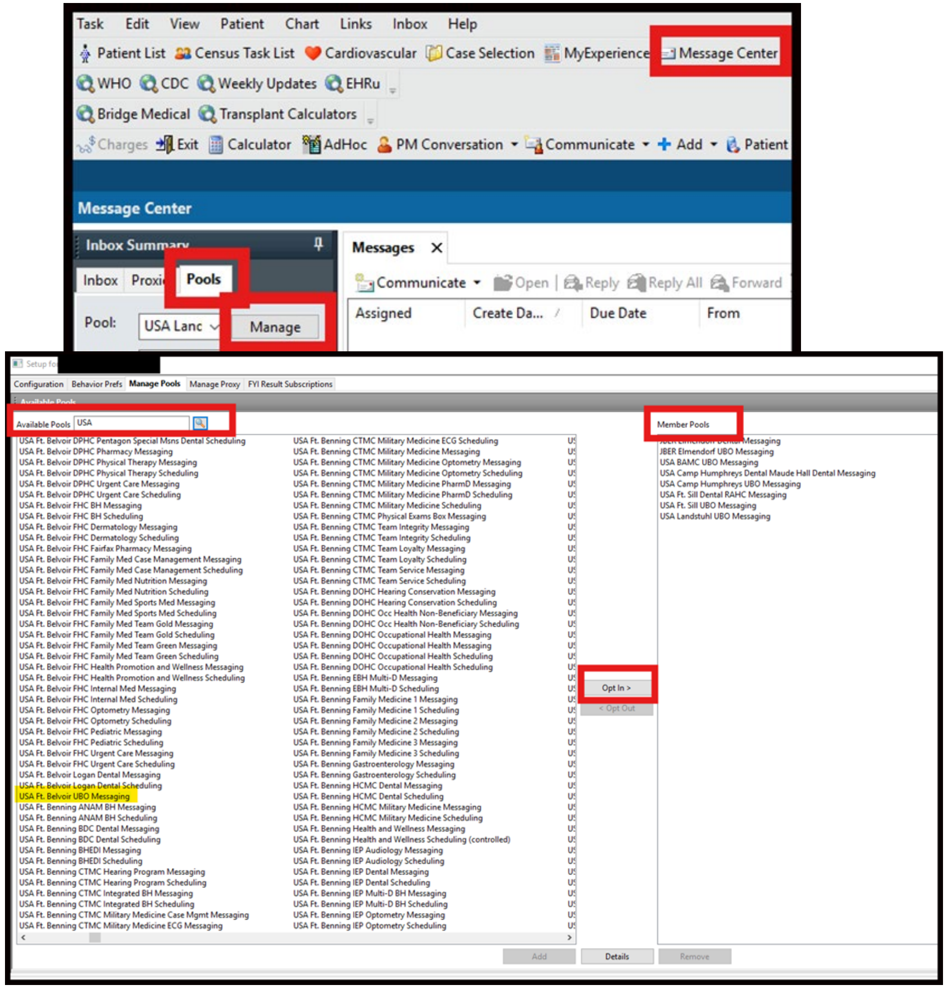
- **Dental Patient Accounting Reports**
  - 1DOD – Dental – Patient Account Reconciliation (Patient Accounting)
  - 1DOD – Dental – Create or Adjust a Patient Payment Plan (Patient Accounting)
  - 1DOD – Dental – Patient Account Reconciliation (Patient Accounting)
  - 1DOD – Dental – Adjust Incorrect Postings (Patient Accounting)
  - 1DOD – Dental – Patient Billing Statement Generation (Patient Accounting)
  - 1DOD – Dental – Revenue Cycle Management Reporting (Patient Accounting)
  - 1DOD – Dental – Day Sheet Report – General Ledger (Patient Accounting)
  - 1DOD – Dental – Suspended Credits – Refunds – Negative Balances (Patient Accounting)

Identifying Dental Billable Encounters

- Two Methods:
  - Dental clinic front desk sends message through the Messaging Center to UBO identifying patients who are deem billable
  - Generate DXONE Report - Procedures Not Attached to Insurance

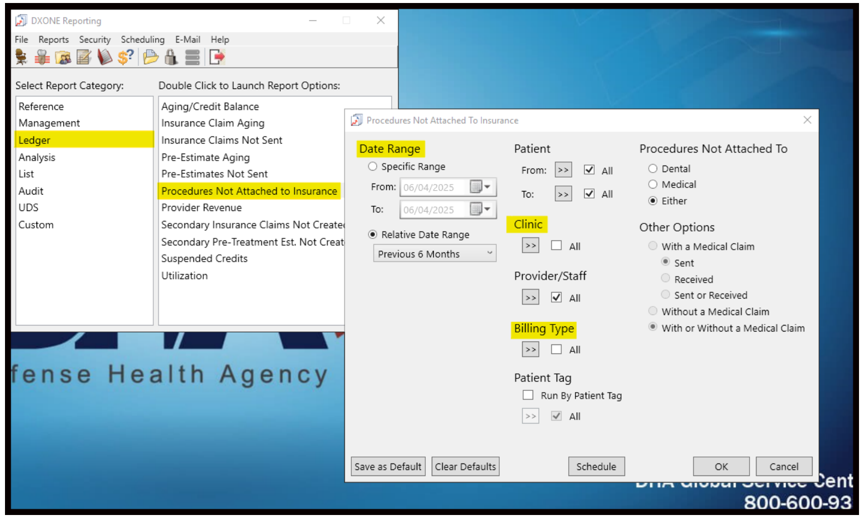
Identifying Dental Billable Encounters – Messaging Center By Dental Front Desk

- At the Clinic level the Dental Staff should notify the local UBO department of VA Share patients, Interagency patients, and any other paid patients via the Message center.
- This can be done via the Message Center Pools as each UBO department has one that they can monitor for specific requests.
- Opting Into a Message Pool
  - 1. Click the PowerChart button (P icon) from the Citrix StoreFront
  - 2. Click Message Center
  - 3. Click the Pools tab
  - 4. Click Manage
  - 5. Available Pools box: Search for your location's Pool… USA…
  - 6. Click the Search button (magnifying glass icon)
  - 7. Available pools list: Select the desired Pool
  - 8. Click Opt In >
  - 9. Click OK
  - 10. Click OK to close the Commit Progress dialog box
  - 11. Click the Minimize button (minus sign icon) to minimize PowerChart



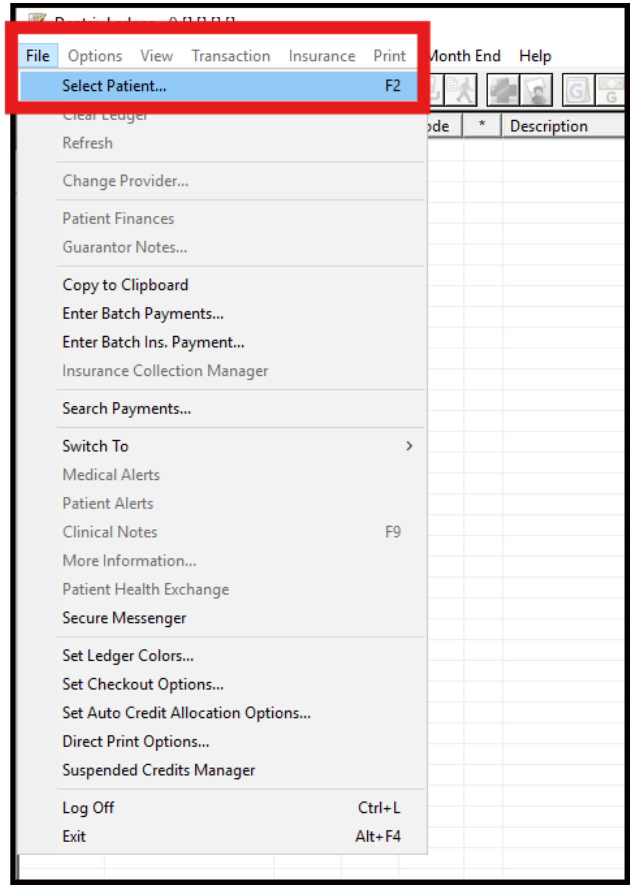
Identifying Dental Billable Encounters – DXONE Report - Procedures Not Attached to Insurance

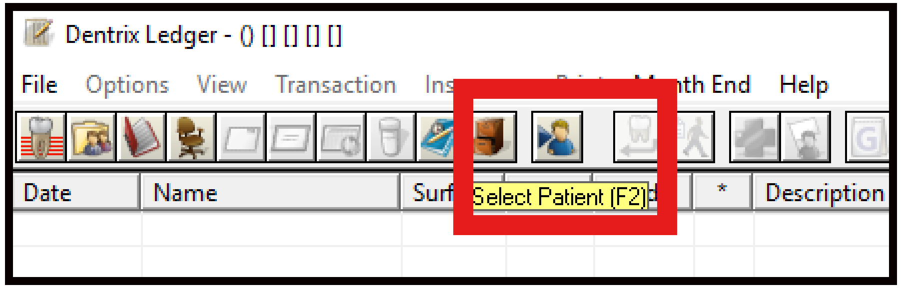
- Dental Billing tasks are required
  - I. From the Dentrix Ledger click on the DXONE Reports Icon
  - II. Select Ledger from the Report Category, double click on Procedures Not Attached to Insurance
  - III. Set the Date Range, Patient: All, Clinic Selection, Billing Type Selection, and any other filters as needed, click OK
  - IV. Export to Excel Spreadsheet



Review Patient Ledger for Dental Billable Procedure

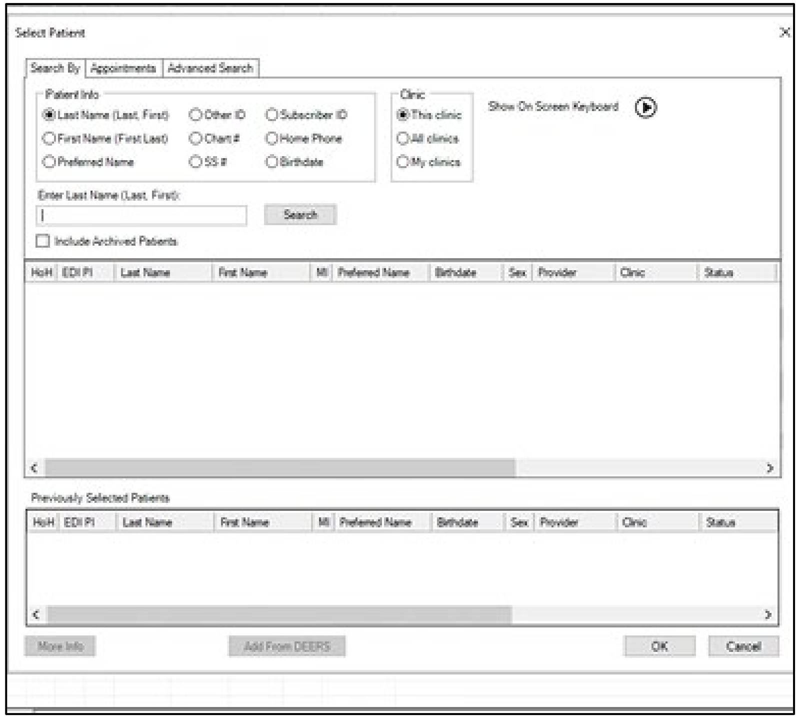
- To search for a patient in the Dentrix ledger, select File > Select Patient, or click the Select Patient Icon from the menu bar

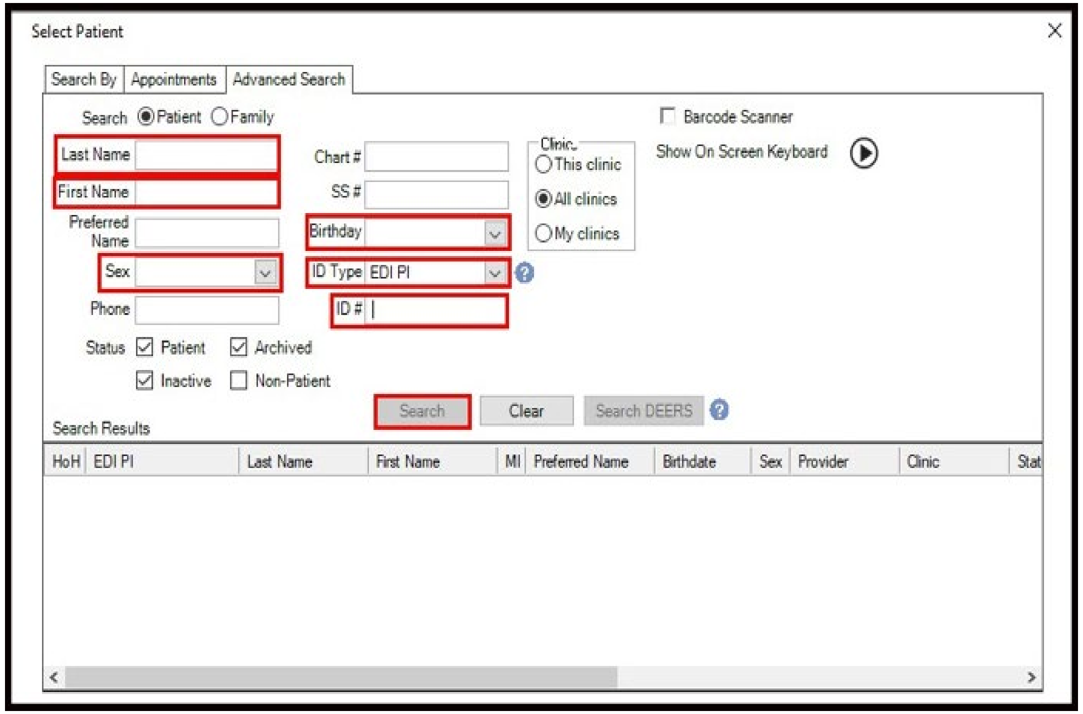




Searching for a Patient

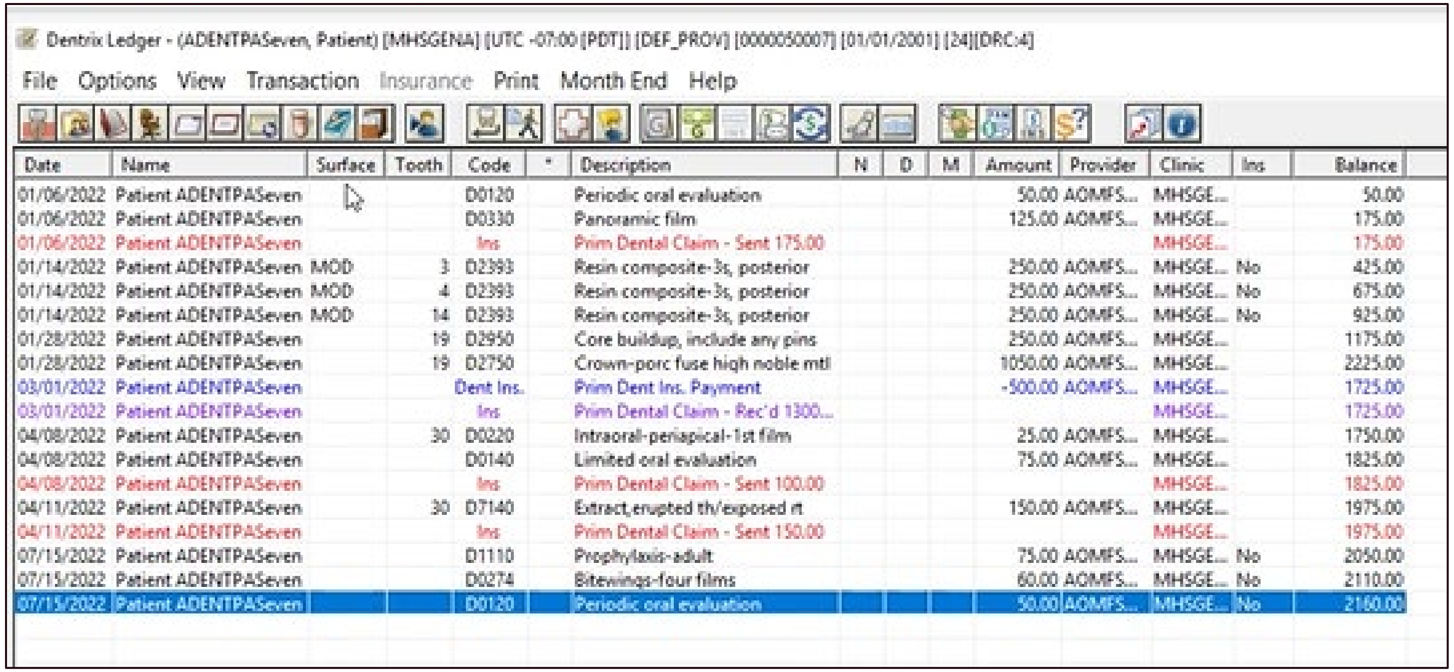
- It is recommended to use the Advanced Search option, as this allows you to search using multiple patient identifiers.
  - Search for a patient by their DoD ID by selecting ID type of EDI PI
  - Under Clinic, select This Clinic to only search for your facility
  - Select Search to search for the patient





Ledger

- Once a patient is selected, the ledger will populate.
  - The ledger is a running list of all procedures, payments, and adjustments for that patient


Dentrix Ledger - (ADENTPASeven, Patient) [MHSGENA] [UTC -07:00 [PDT]] [DEF_PROV] [0000050007] [01/01/2001] [24][DRC:4]

File Options View Transaction Insurance Print Month End Help

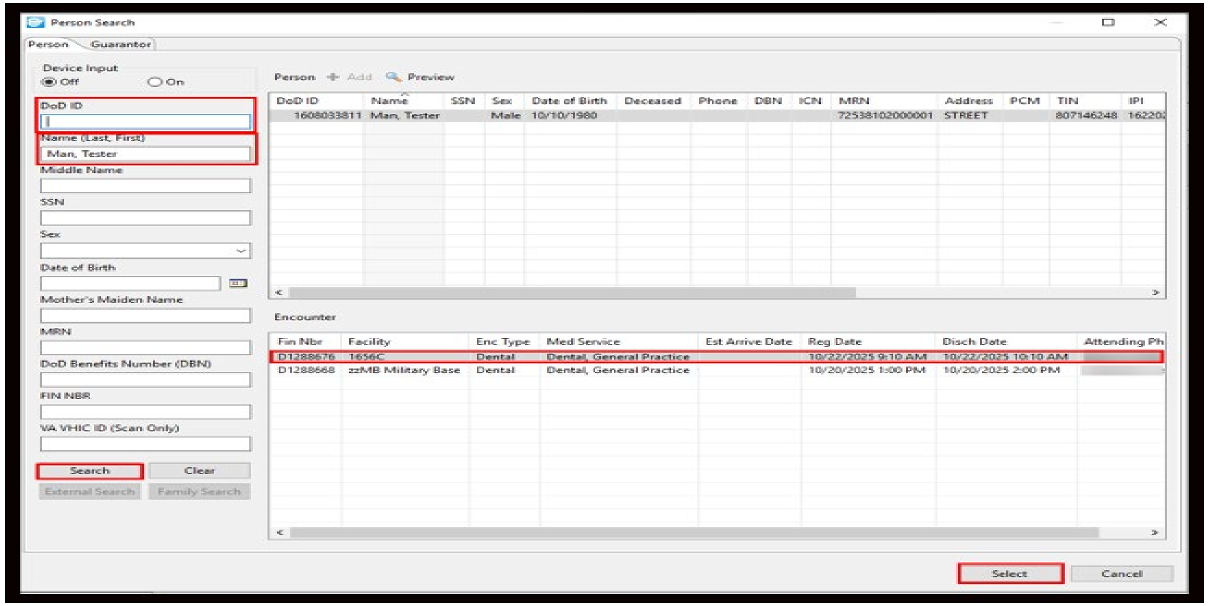
Date	Name	Surface	Tooth	Code	*	Description	N	D	M	Amount	Provider	Clinic	Ins	Balance
01/06/2022	Patient ADENTPASeven			D0120		Periodic oral evaluation				50.00	AOMFS...	MHSGE...		50.00
01/06/2022	Patient ADENTPASeven			D0330		Panoramic film				125.00	AOMFS...	MHSGE...		175.00
01/06/2022	Patient ADENTPASeven			Ins		Prim Dental Claim - Sent 175.00						MHSGE...		175.00
01/14/2022	Patient ADENTPASeven	MOD	3	D2393		Resin composite-3s, posterior				250.00	AOMFS...	MHSGE...	No	425.00
01/14/2022	Patient ADENTPASeven	MOD	4	D2393		Resin composite-3s, posterior				250.00	AOMFS...	MHSGE...	No	675.00
01/14/2022	Patient ADENTPASeven	MOD	14	D2393		Resin composite-3s, posterior				250.00	AOMFS...	MHSGE...	No	925.00
01/28/2022	Patient ADENTPASeven		19	D2950		Core buildup, include any pins				250.00	AOMFS...	MHSGE...		1175.00
01/28/2022	Patient ADENTPASeven		19	D2750		Crown-porc fuse high noble mtl				1050.00	AOMFS...	MHSGE...		2225.00
03/01/2022	Patient ADENTPASeven			Dent Ins.		Prim Dent Ins. Payment				-500.00	AOMFS...	MHSGE...		1725.00
03/01/2022	Patient ADENTPASeven			Ins		Prim Dental Claim - Rec'd 1300...						MHSGE...		1725.00
04/08/2022	Patient ADENTPASeven		30	D0220		Intraoral-periapical-1st film				25.00	AOMFS...	MHSGE...		1750.00
04/08/2022	Patient ADENTPASeven			D0140		Limited oral evaluation				75.00	AOMFS...	MHSGE...		1825.00
04/08/2022	Patient ADENTPASeven			Ins		Prim Dental Claim - Sent 100.00						MHSGE...		1825.00
04/11/2022	Patient ADENTPASeven		30	D7140		Extract,erupted th/exposed rt				150.00	AOMFS...	MHSGE...		1975.00
04/11/2022	Patient ADENTPASeven			Ins		Prim Dental Claim - Sent 150.00						MHSGE...		1975.00
07/15/2022	Patient ADENTPASeven			D1110		Prophylaxis-adult				75.00	AOMFS...	MHSGE...	No	2050.00
07/15/2022	Patient ADENTPASeven			D0274		Bitewings-four films				60.00	AOMFS...	MHSGE...	No	2110.00
07/15/2022	Patient ADENTPASeven			D0120		Periodic oral evaluation				50.00	AOMFS...	MHSGE...	No	2160.00

Ledger Key:

- Red: Primary dental claim that was sent but not received
- Blue: Primary dental insurance payment
- Purple: Dental claim that has been received
- Green: Patient payment
- **Black**: Completed treatment

Verify Required Dental OHI Information

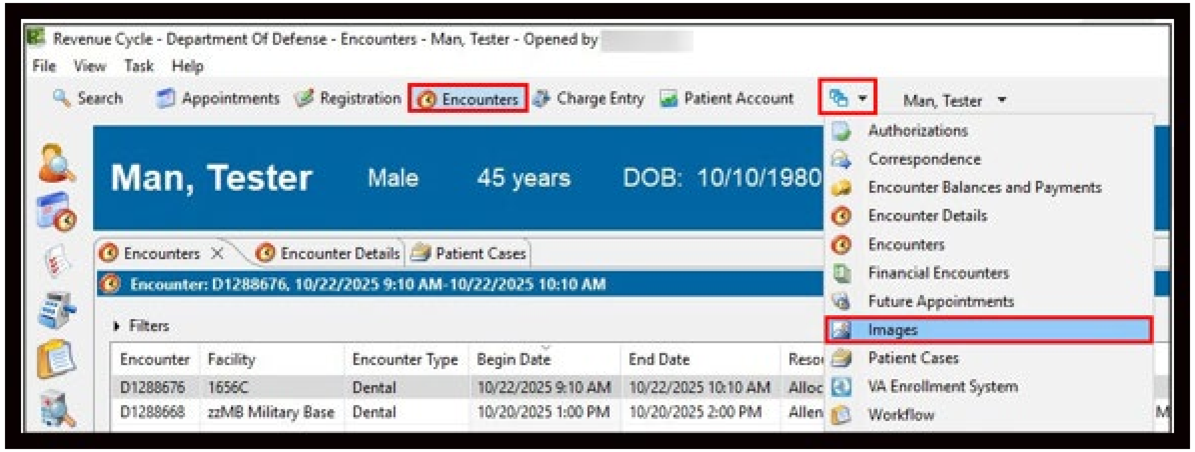
1. From the Citrix StoreFront, click the **Revenue Cycle** Application (R icon).
2. Click **Search**
3. Search for the patient.
   - In the DOD ID box, enter the patient's DOD ID.
   - Or in the Name (Last, First) box, enter the patient's name.
4. Click **Search.**
5. Under the Encounter pane, select the applicable patient's encounter.
6. Click **Select.**

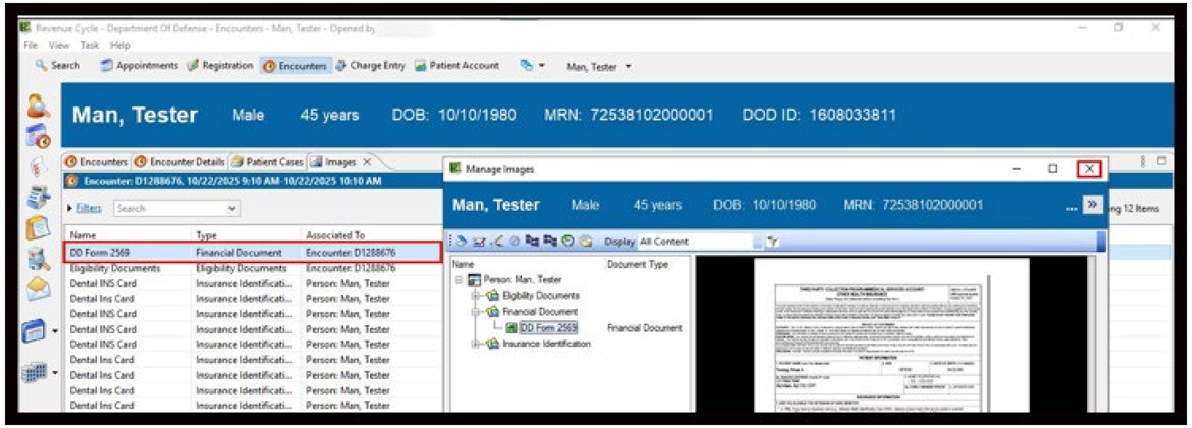


Verify Required Dental OHI Information (Cont.)

7. From the Patient Perspectives, click **Encounters.**
8. Click the **Images** tab.
   - If you are unable to locate the Image tab:
     - Click the Open View button (three tabs icon).
     - Select Images.
9. Review the list of files.

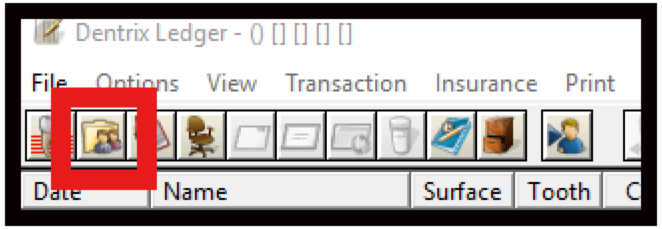
10. To verify dental insurance, double-click the DD Form 2569 and/or Dental Insurance card.
11. From the Manage Images window, click the **Close** button (X icon).

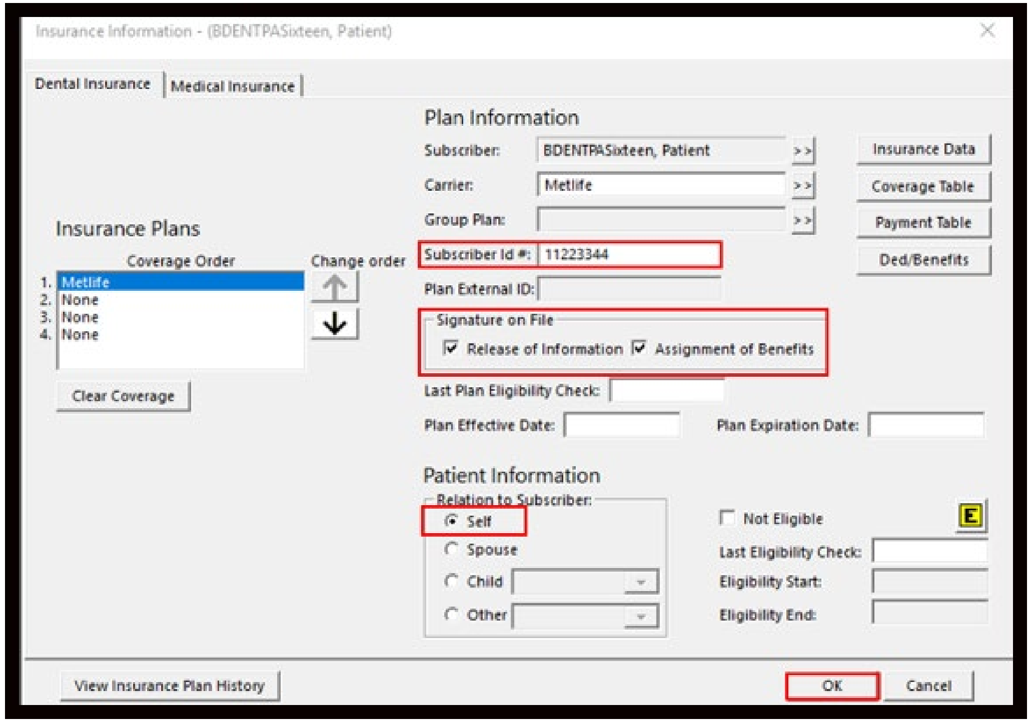




Verify or Update Dental Insurance

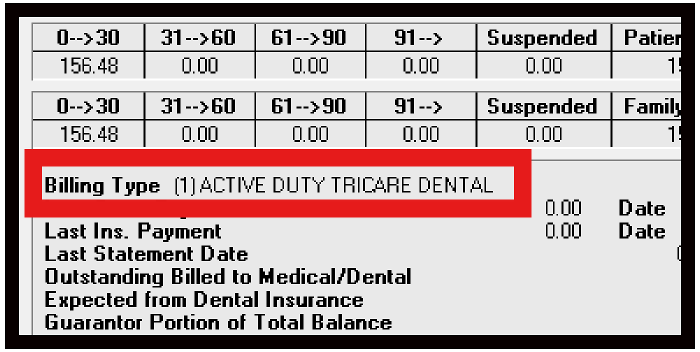
- From the *Dentrix* Ledger toolbar, click the Family File button (manila folder and two people icon)to directly access the Patients Dental Insurance Information pane.
- To indicate the coverage as primary or secondary, in the Coverage Order list of the Insurance Plans section, select the coverage to add to the patient’s chart.
- To open the Select Primary Subscriber (Insured Party) dialog box, click the **Subscriber Search** button (double greater than icon).
- Click the **Carrier Search** button (double greater than icon).
  - In the Select Dental Insurance Plan dialog box’s Enter Carrier Name box, enter the first several letters of the insurance carrier’s name.
  - If *Dentrix Enterprise* does not display the carrier in the Carrier box, press % as a wildcard option to list all system plans.
- To save the insurance assignment, click **OK**.

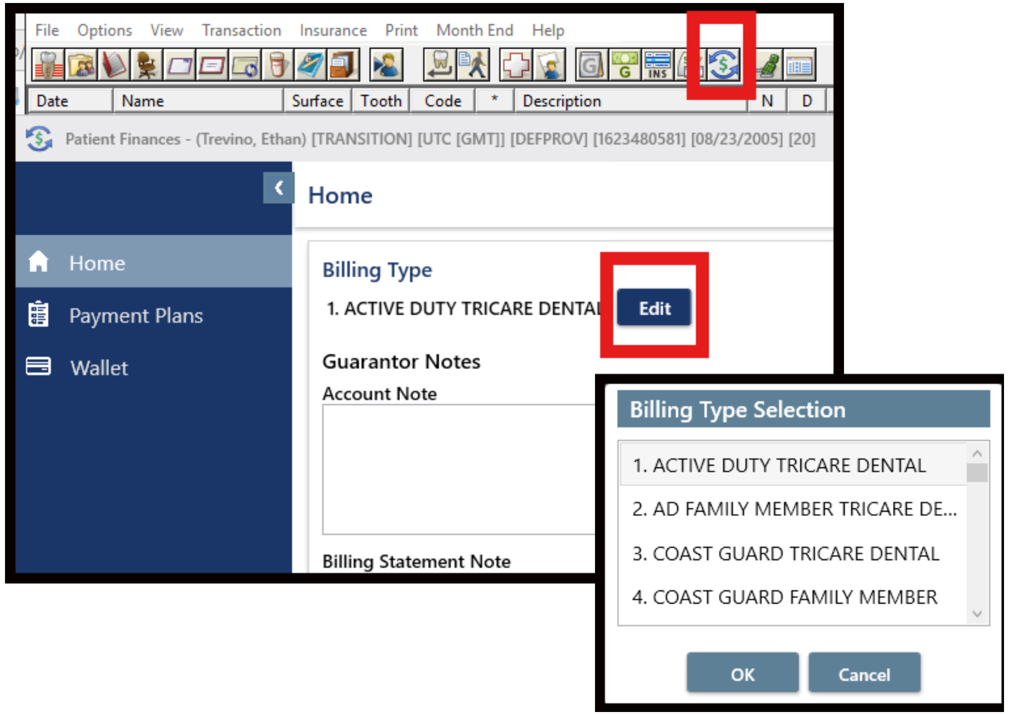




Verify Billing Type

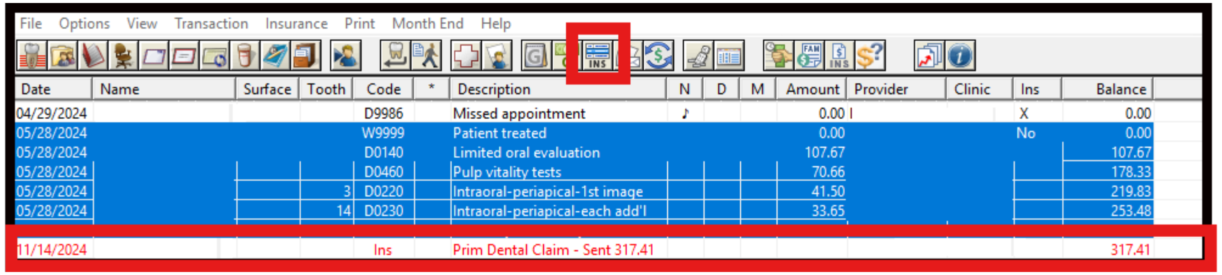
- If a patient's billing type is inaccurate, it negatively affects reporting.
- The patient billing type is the Dentrix Enterprise equivalent to Revenue Cycle Profiles.
  1. From the Patient Finances window, review the Billing Type information.
  2. Click Edit.
  3. Locate the patient's billing type, click OK.





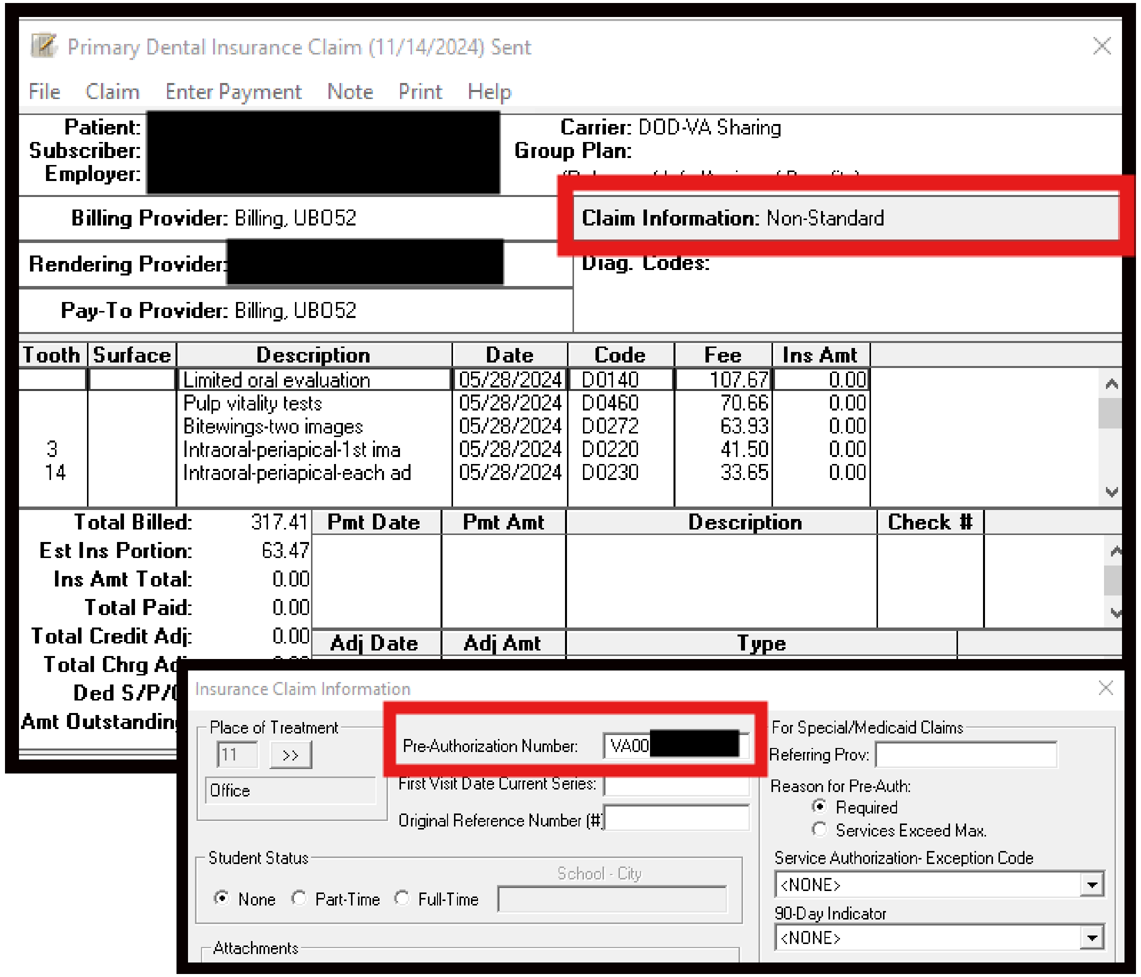
Create a Dental Claim

- If you receive a message from a clinic that a patient with dental insurance has billable treatment, create a dental claim.
  1. From the *Dentrix* Ledger, select the procedure you wish to include in the claim.
     - To select more than one procedure from the list, press CTRL.
  2. From the toolbar, click the **Ins. Selected Proc.** button (3 rows with INS icon).
  3. Dental Claim is now created



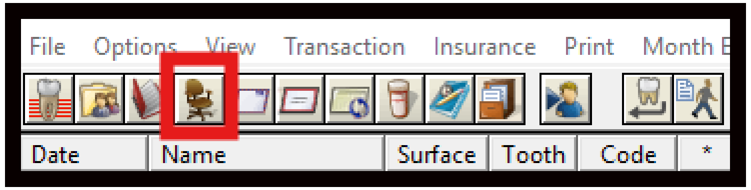
Add Missing VA Authorization Number

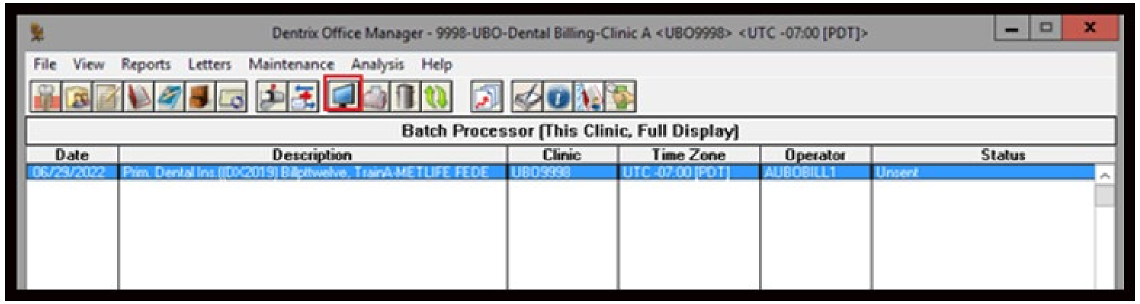
1. Select and Open the VA patient Dental Claim in the Ledger
2. Double Click in the Claim Information Pane
3. Insurance Claim Information window open.
4. Enter missing VA authorization number.

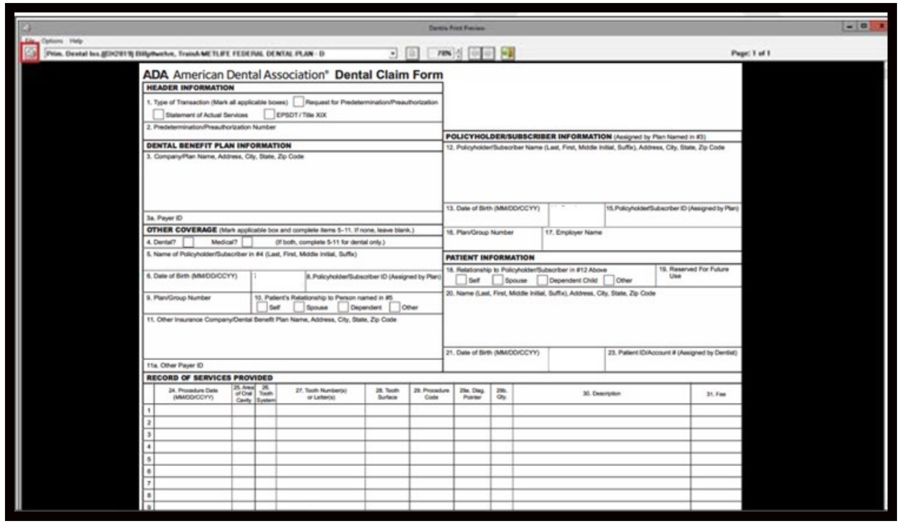


Print a Dental Claim

1. To open Office Manager, click the **Office Manager** button (office chair icon).
2. From the Batch Processor list, select a dental claim.
3. Click the **Print Preview** button (computer monitor icon).
4. Review the dental claim information.
5. To print the dental claim form, click the **Print** button (printer icon).

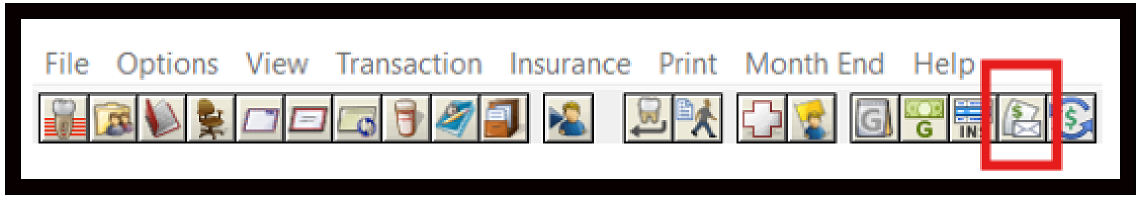


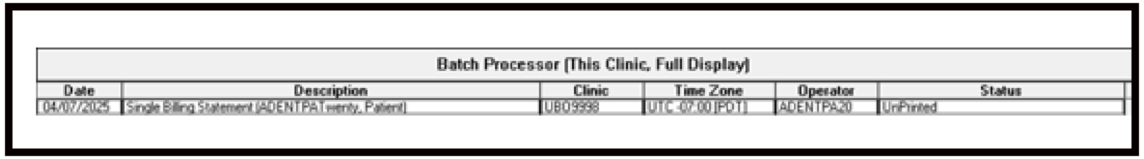


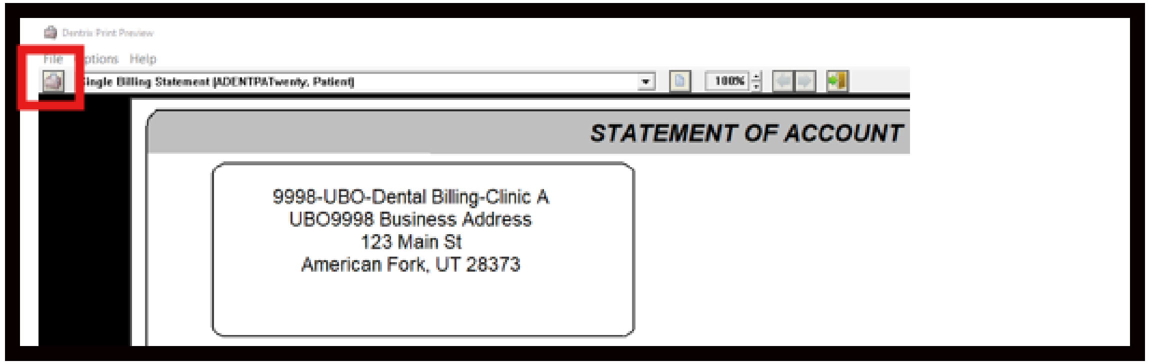


Generate a Patient Billing Statement

- **Generate a Single Billing Statement**
  1. Click Print Statement to send the statement to Batch Processor (Only need to click once)
  2. Click the Office Manager button (office chair icon)
  3. Description column of the Batch Processor: the patient’s Single Billing Statement
  4. Click the Print Report button (printer icon)
  5. Click OK
  6. Click the Close button (X icon) to close the Office Manager

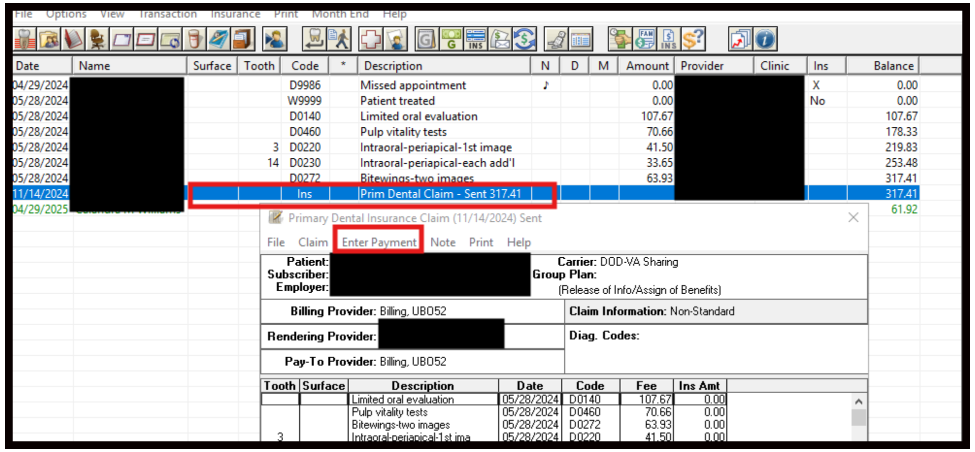


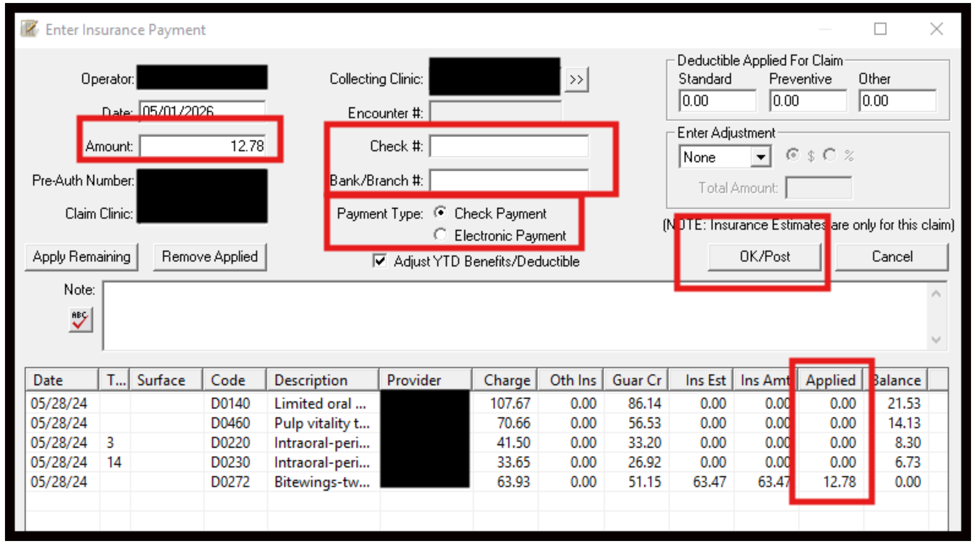




Post a Dental Insurance Payment

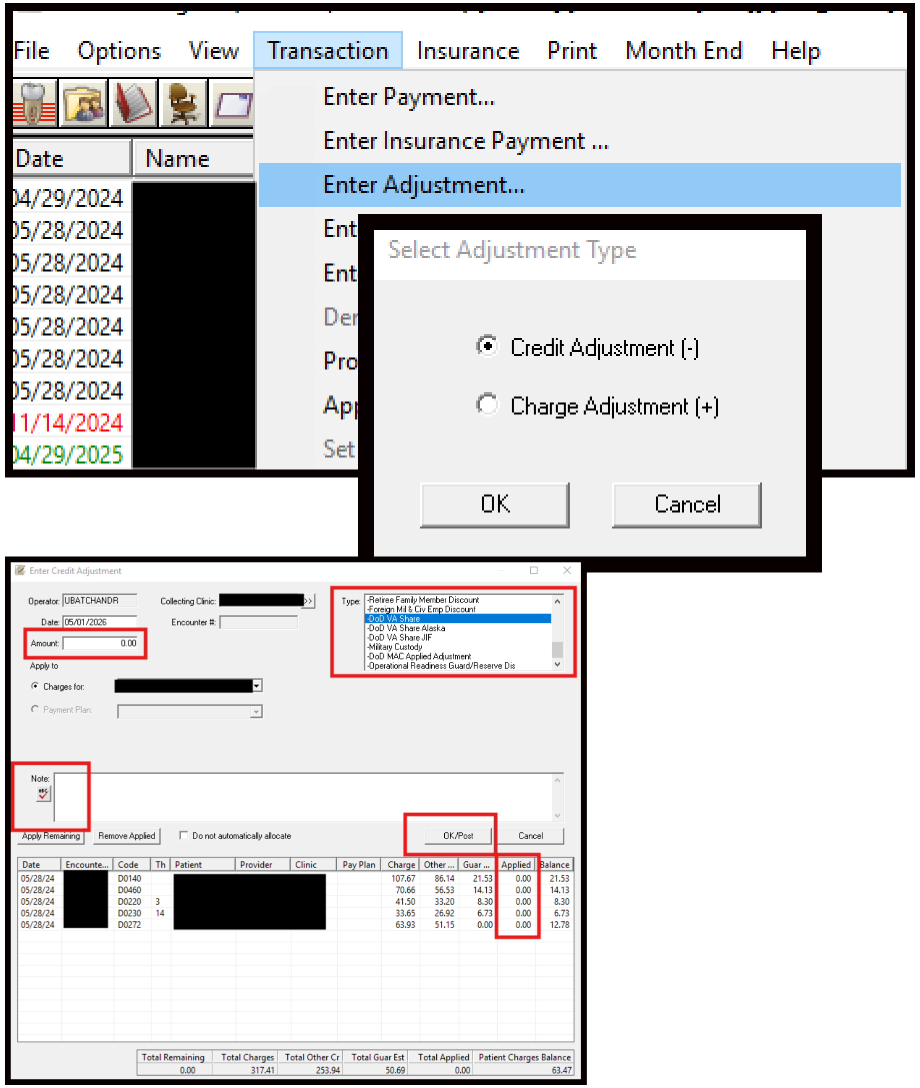
- **Post a Single Dental Insurance Payment**
  1. Double-click the desired claim
  2. Click Enter Payment in the Insurance Claim dialog box
  3. Amount box: Amount of Insurance Payment
  4. Apply a payment method (Check, Bank/Branch #, Etc.)
  5. Review the balance for each procedure
  6. Double-click the cell in the Applied column of the procedure
  7. Applied Amount box: Desired amount to apply from payment
  8. Click OK





Posting an Adjustment

- **Post an Adjustment**
  1. Dentrix Ledger Transaction menu: Enter Adjustment
  2. Select Adjustment Type dialog box: Select Credit (-) or Charge (+)
  3. Click OK
  4. Amount box: Adjustment amount
  5. Type list: Select Type of adjustment
  6. Double-click the cell in the Applied column of desired procedure
  7. Applied Amount box: Amount desired for adjustment for each or one procedure
  8. Click the check mark button (check mark icon)
  9. Note box: Add in any applicable notes into the notes field
  10. Click OK/Post



Questions