

UNCLASSIFIED



# Dentrix Overview

MAY 2026

UNCLASSIFIED



# Agenda



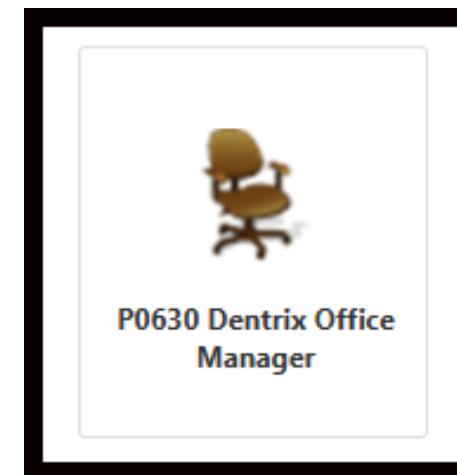
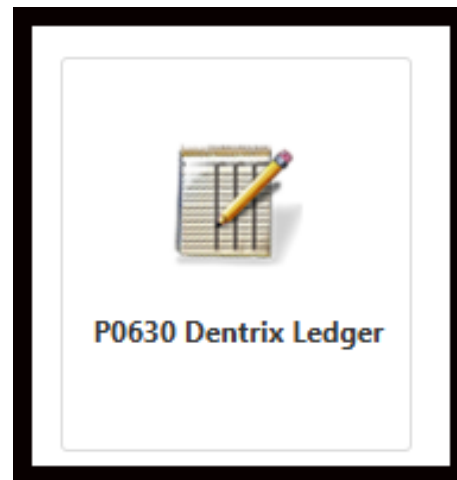
- What is Dentrix
- How to Get Access to Dentrix
- Dentrix Ledger vs. Dentrix Office Manager
- Overview of Dentrix Ledger
- Helpful Handouts for Dentrix
- MHS Genesis 1DOD Dental Workflows
- Workflows
  - Identifying Billable Encounters
  - Messaging Center
  - Searching for a Patient
  - Document Center
  - 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

<small>Required for SPT registration BUSINESS PT NUMBER</small>	
5. ARE YOU DENTAL PERSONNEL?	YES <input type="radio"/> NO <input checked="" type="radio"/>
Will you need to take workload and/or will appointments be scheduled with you? (i.e. Dentist, Registered Hygienist, Prophy Tech)	YES <input type="radio"/> NO <input checked="" type="radio"/>
(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
6a. ARE YOU NATIONAL GUARD OR RESERVE?	Dentrix - CPA: Biller, Cerner - CPA: Biller
If so, enter active order end date:	Dentrix - CPA: Cash Poster, Cerner - CPA: Cash Poster
6b. ARE YOU A STUDENT, RESIDENT, INTERN OR FELLOW?	Dentrix - CPA: Management, Cerner - CPA: Management
If yes, when do you graduate?	Dentrix - Dental Staff, Cerner - Ambulatory: MA
Training Status	Dentrix - HIM: Coder w/CPA, Cerner - HIM: Coder w/CPA
	Dentrix - Provider (Dentist), Cerner - Physician-Dentist
	Dentrix - Provider (Dentist), Cerner - Resident/Intern
	Dentrix - Provider (Non-Dentist), Cerner - Ambulatory
<b>PROVIDERS ONLY: All providers require review and concurrence from local Medical Staff Management (Credentialing office) indicating provider is appropriately credentialed &amp; privileged IAW DHA-PM 6025.13.</b>	
Medical Staff Management CAC Signature:	
IRMSS_EHRA_v3.3	Page 1 of 3



# How to Access Dentrrix



- Dentrrix 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 Enterprise Security

Enter Clinic ID that you want to enter

Clinic ID: UBO0098

Save Clinic ID as Default

Sign In Cancel

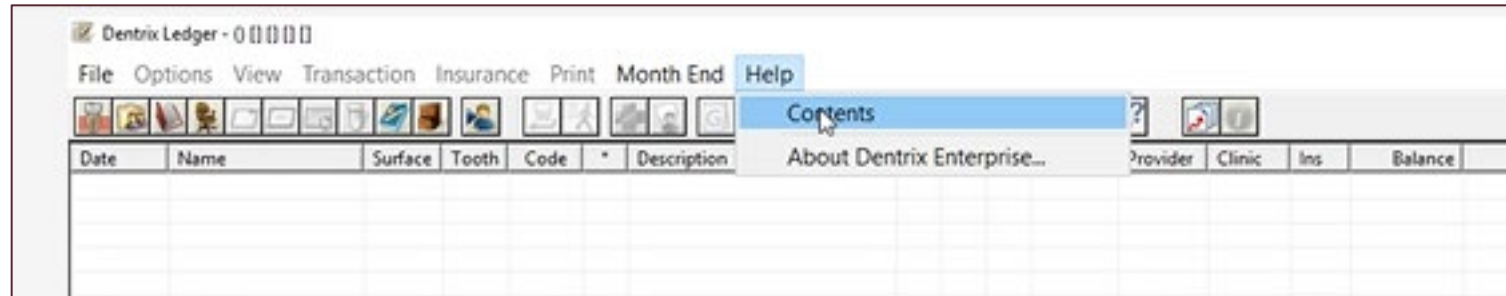
11.0.49.454



# 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](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



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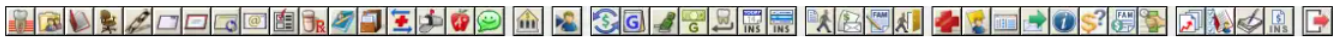
🔍

☰ 🔍

- ⊕ 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 allocation
    - 📄 Setting up direct print options
    - 📄 Setting the default for applying charges
  - 📄 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
	<a href="#">Patient Chart</a>	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.
	<a href="#">Family File</a>	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.
	<a href="#">Appointments</a>	Click to schedule appointments and perform appointment-related tasks. When Appointment Book opens, it displays today's date and uses the default view.
	<a href="#">Office Manager</a>	Click to view or generate reports, perform maintenance, or configure settings.
	<a href="#">DentiXlink</a>	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.
	<a href="#">Quick Letters</a>	Click to open the <b>Quick Letters</b> dialog box to create a letter by merging information that is specific to the patient who is selected in Ledger into a document template. <b>Note:</b> This button is available only if a patient is selected.
	<a href="#">Quick Labels</a>	Click to open the <b>Quick Labels</b> dialog box to create a label by merging information that is specific to the patient who is selected in Ledger with a label template. <b>Note:</b> This button is available only if a patient is selected.
	<a href="#">Continuing Care</a>	Click to track and manage the on-going dental care of the patient who is selected in Ledger. <b>Note:</b> This button is available only if a patient is selected.
	<a href="#">Send Message</a>	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 <b>To</b> box of the email message automatically. If an email address has not been entered for the selected patient, the <b>To</b> box of the email message is blank. <b>Note:</b> This button is available only if a patient is selected.
	<a href="#">Patient Questionnaire</a>	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. <b>Note:</b> This button is available only if a patient is selected.



# Dentrix Helpful Content - Search Function



Home
Dentrix Enterprise 11.0.49 Help

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

**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**

- With a [patient or subscriber selected](#) in Family File, double-click the **insurance** information block.
- 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**.
  - 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:
    - On the message, click **Yes**.

Password - Patients, Edit Insurance Information

User Name:

User ID:

Password:

Dentrix Dental Systems

1 to 20 of 1356 results



# 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



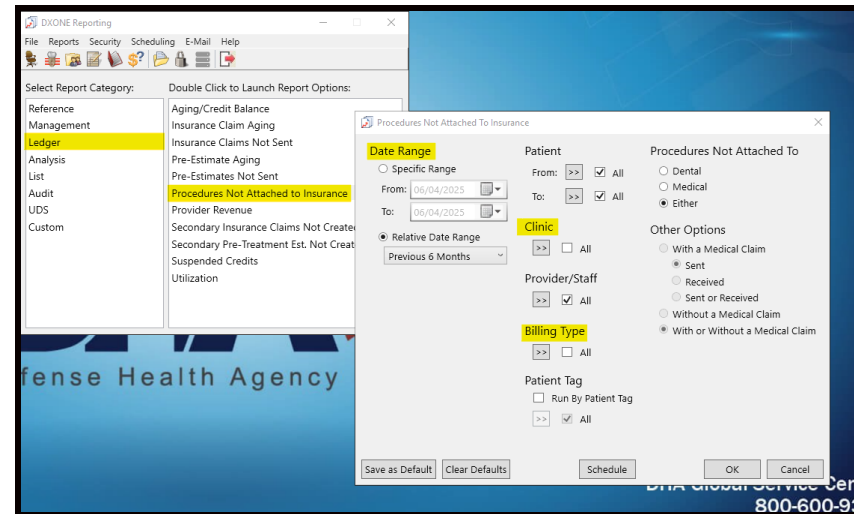
The screenshot displays the Message Center interface. The top navigation bar includes 'Task', 'Edit', 'View', 'Patient', 'Chart', 'Links', 'Inbox', and 'Help'. Below this, there are various toolbars and a 'Message Center' section. The 'Pools' tab is highlighted, and the 'Manage' button is visible. The 'Manage Pools' dialog box is open, showing a search for 'USA' in the 'Available Pools' box. The search results list various medical services and their corresponding 'Member Pools'. The 'USA Belvoir UBO Messaging' pool is highlighted, and the 'Opt In >' button is visible next to it.



# 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

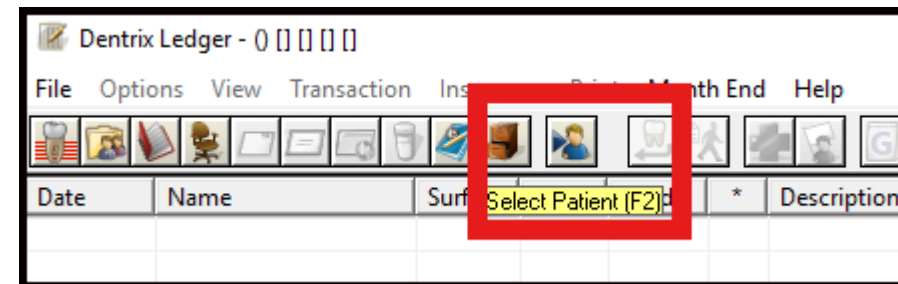
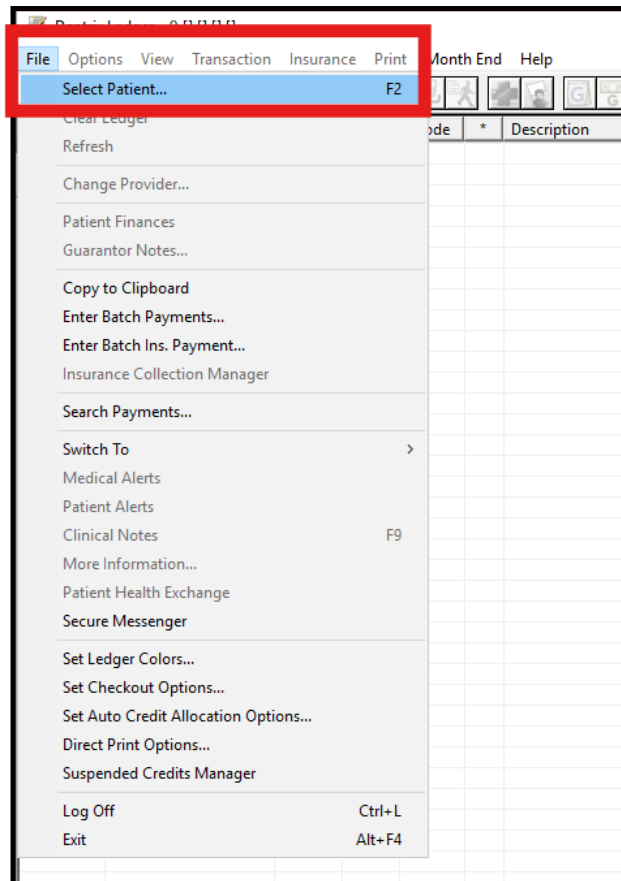




# Review Patient Ledger for Dental Billable Procedure



- 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

Select Patient

Search By | Appointments | **Advanced Search**

Patient Info

Last Name (Last, First)
  Other ID
  Subscriber ID

First Name (First Last)
  Chart #
  Home Phone

Preferred Name
  SS #
  Birthdate

Enter Last Name (Last, First):

Include Archived Patients

Clinic

This clinic
  All clinics
  My clinics

Show On Screen Keyboard

HoH	EDI PI	Last Name	First Name	MI	Preferred Name	Birthdate	Sex	Provider	Clinic	Status

Previously Selected Patients

HoH	EDI PI	Last Name	First Name	MI	Preferred Name	Birthdate	Sex	Provider	Clinic	Status



Select Patient

Search By | Appointments | **Advanced Search**

Search  Patient  Family

Last Name
  First Name
  Preferred Name
  Sex
  Phone

Chart #
  SS #
  Birthday
  ID Type EDI PI
  ID #

Clinic

This clinic
  All clinics
  My clinics

Barcode Scanner

Show On Screen Keyboard

Status  Patient  Archived  Inactive  Non-Patient

Search Results

HoH	EDI PI	Last Name	First Name	MI	Preferred Name	Birthdate	Sex	Provider	Clinic	Stat



# 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 it				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:

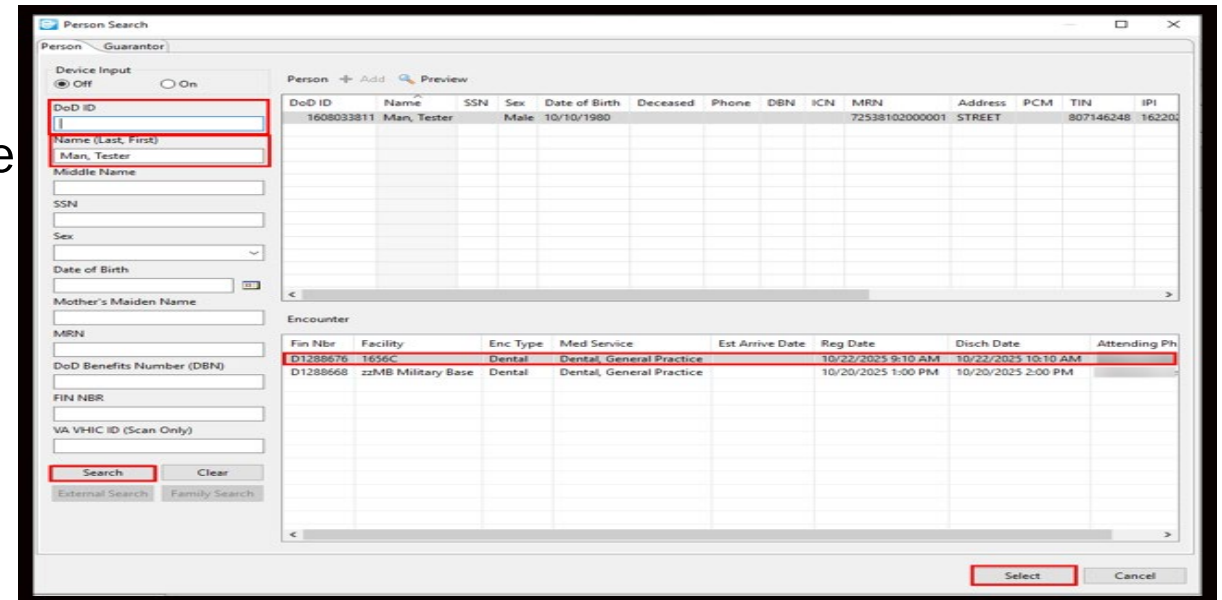
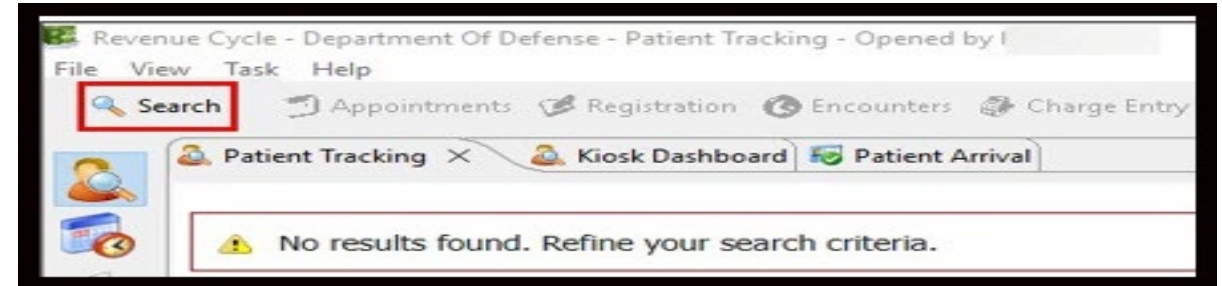
- Red:** Primary dental claim that was sent but not received
- Blue:** Primary dental insurance payment
- Purple:** Dental claim that has been received
- Green:** Patient payment
- Black:** Completed treatment



# Verify Required Dental OHI Information



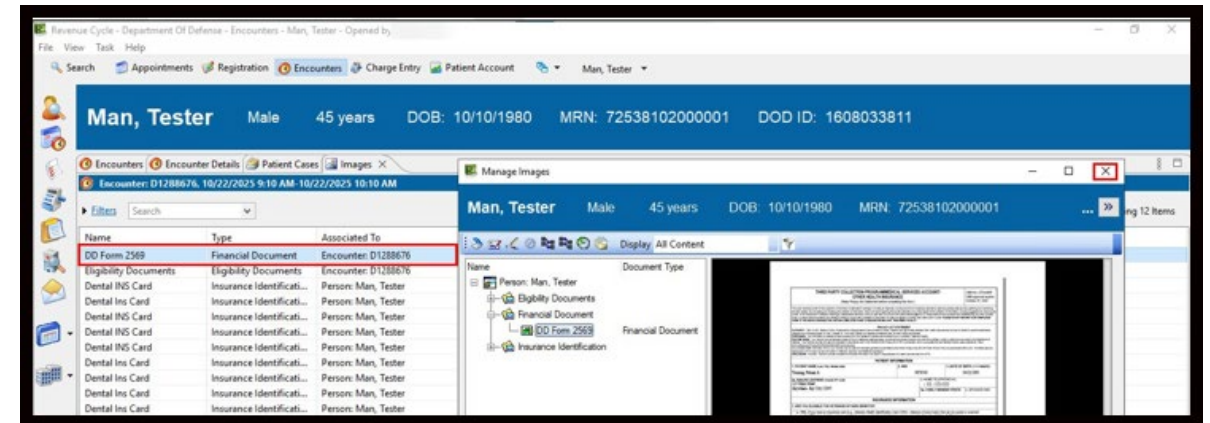
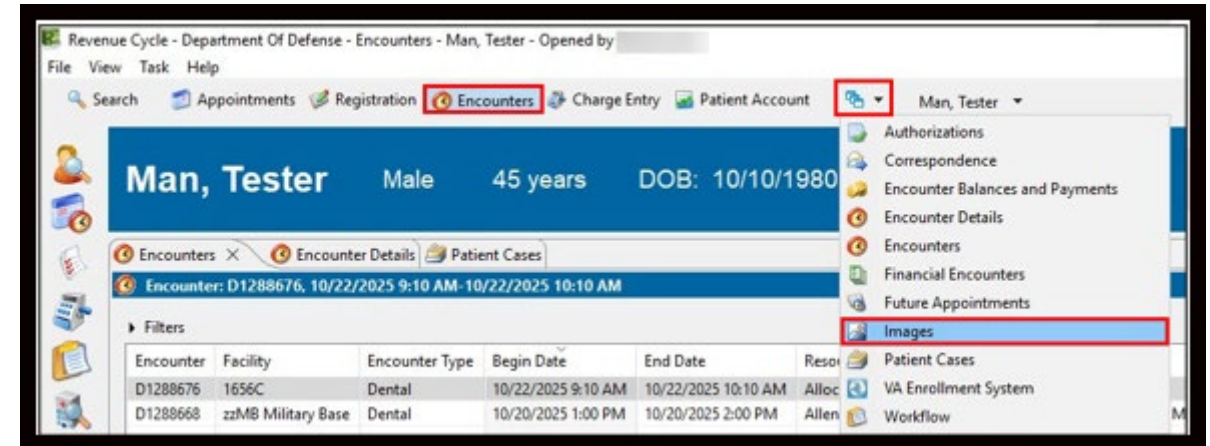
1. From the Citrix StoreFront, click the **Revenue Cycle Application (R icon)**.
2. Click **Search**
3. Search for the patient.
  - In the DOD ID box, enter the patient's DOD ID.
  - Or in the Name (Last, First) box, enter the patient's name.
4. Click **Search**.
5. Under the Encounter pane, select the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

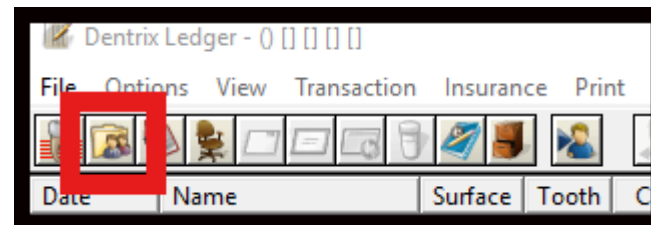




# Verify or Update Dental Insurance



- 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**.



The screenshot shows the Insurance Information dialog box for patient BDENTPASixteen. The dialog is divided into several sections:

- Dental Insurance | Medical Insurance**: Tabs at the top.
- Insurance Plans**: A list with a "Coverage Order" column. The list contains:
  1. Metlife
  2. None
  3. None
  4. None
 A "Change order" button with up and down arrows is to the right of the list. A "Clear Coverage" button is below the list.
- Plan Information**: Fields for Subscriber (BDENTPASixteen, Patient), Carrier (Metlife), and Group Plan. A "Subscriber Id #:" field contains 11223344. To the right are buttons for Insurance Data, Coverage Table, Payment Table, and Ded/Benefits.
- Signature on File**: A section with checkboxes for "Release of Information" and "Assignment of Benefits", both of which are checked.
- Patient Information**: A "Relation to Subscriber:" dropdown menu with "Self" selected. Other options include Spouse, Child, and Other. There is also a "Not Eligible" checkbox and a button labeled "E".
- Buttons**: "View Insurance Plan History", "OK", and "Cancel" buttons are at the bottom.



# 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.

0-->30	31-->60	61-->90	91-->	Suspended	Patient
156.48	0.00	0.00	0.00	0.00	1
0-->30	31-->60	61-->90	91-->	Suspended	Family
156.48	0.00	0.00	0.00	0.00	1

**Billing Type** (1) ACTIVE DUTY TRICARE DENTAL 0.00 Date  
 Last Ins. Payment 0.00 Date  
 Last Statement Date  
 Outstanding Billed to Medical/Dental  
 Expected from Dental Insurance  
 Guarantor Portion of Total Balance

File Options View Transaction Insurance Print Month End Help

Date Name Surface Tooth Code \* Description N D

Patient Finances - (Trevino, Ethan) [TRANSITION] [UTC [GMT]] [DEFPROV] [1623480581] [08/23/2005] [20]

Home

Home  
Payment Plans  
Wallet

**Billing Type**  
1. ACTIVE DUTY TRICARE DENTAL **Edit**

**Guarantor Notes**  
Account Note

Billing Statement Note

**Billing Type Selection**

1. ACTIVE DUTY TRICARE DENTAL  
2. AD FAMILY MEMBER TRICARE DE...  
3. COAST GUARD TRICARE DENTAL  
4. COAST GUARD FAMILY MEMBER

OK Cancel



# 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

The screenshot shows the Dentrix Ledger software interface. The 'INS' button in the toolbar is highlighted with a red box. The table below shows a list of dental procedures with columns for Date, Name, Surface, Tooth, Code, Description, N, D, M, Amount, Provider, Clinic, Ins, and Balance. A summary row at the bottom is highlighted in red, showing the total amount for the dental claim.

Date	Name	Surface	Tooth	Code	Description	N	D	M	Amount	Provider	Clinic	Ins	Balance
04/29/2024				D9986	Missed appointment				0.00			X	0.00
05/28/2024				W9999	Patient treated				0.00			No	0.00
05/28/2024				D0140	Limited oral evaluation				107.67				107.67
05/28/2024				D0460	Pulp vitality tests				70.66				178.33
05/28/2024			3	D0220	Intraoral-periapical-1st image				41.50				219.83
05/28/2024			14	D0230	Intraoral-periapical-each add'l				33.65				253.48
11/14/2024				Ins	Prim Dental Claim - Sent 317.41								317.41



# 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.

Primary Dental Insurance Claim (11/14/2024) Sent

File Claim Enter Payment Note Print Help

Patient: [REDACTED] Carrier: DOD-VA Sharing  
 Subscriber: [REDACTED] Group Plan: [REDACTED]  
 Employer: [REDACTED]

Billing Provider: Billing, UB052 **Claim Information: Non-Standard**

Rendering Provider: [REDACTED] Diag. Codes:

Pay-To Provider: Billing, UB052

Tooth	Surface	Description	Date	Code	Fee	Ins Amt
		Limited oral evaluation	05/28/2024	D0140	107.67	0.00
		Pulp vitality tests	05/28/2024	D0460	70.66	0.00
		Bitewings-two images	05/28/2024	D0272	63.93	0.00
3		Intraoral-periapical-1st ima	05/28/2024	D0220	41.50	0.00
14		Intraoral-periapical-each ad	05/28/2024	D0230	33.65	0.00

<b>Total Billed:</b>	317.41	<b>Pmt Date</b>		<b>Pmt Amt</b>		<b>Description</b>		<b>Check #</b>	
<b>Est Ins Portion:</b>	63.47								
<b>Ins Amt Total:</b>	0.00								
<b>Total Paid:</b>	0.00								
<b>Total Credit Adj:</b>	0.00	<b>Adj Date</b>		<b>Adj Amt</b>		<b>Type</b>			
<b>Total Chrg Ad:</b>									
<b>Ded S/P/...</b>									
<b>Amt Outstanding</b>									

Insurance Claim Information

Place of Treatment: 11 >>

Office: [REDACTED]

Student Status:  None  Part-Time  Full-Time School - City: [REDACTED]

Attachments: [REDACTED]

Pre-Authorization Number: VA00 [REDACTED]

For Special/Medicaid Claims  
 Referring Prov: [REDACTED]

Reason for Pre-Auth:  
 Required  
 Services Exceed Max.

Service Authorization- Exception Code: <NONE>

90-Day Indicator: <NONE>



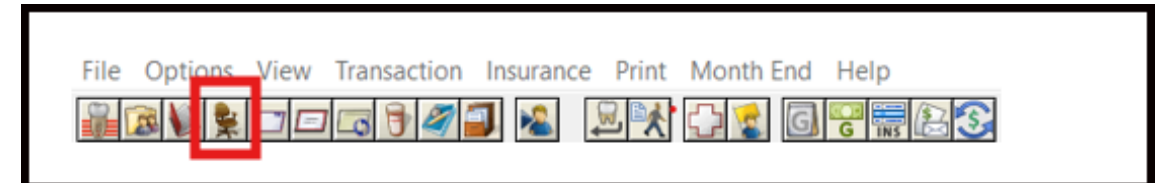
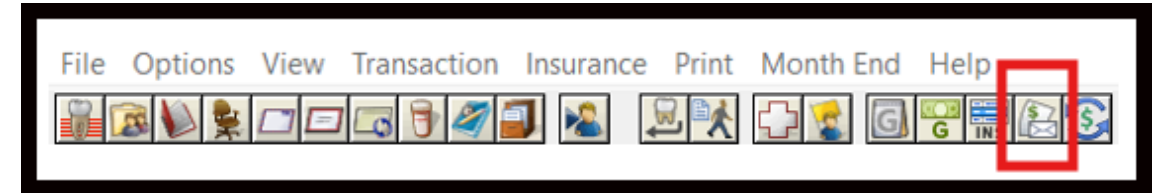


# Generate a Patient Billing Statement

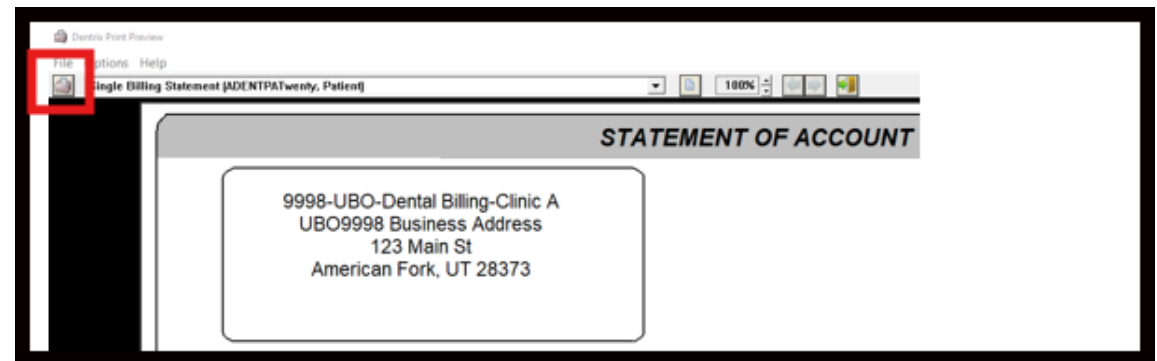


- **Generate a Single Billing Statement**

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



Batch Processor (This Clinic, Full Display)					
Date	Description	Clinic	Time Zone	Operator	Status
04/07/2025	Single Billing Statement (ADENTPATTwenty, Patient)	UBO9998	UTC-07:00(PDT)	ADENTPA20	UnPrinted





# 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

The screenshot shows a dental insurance claim interface. A table lists procedures with columns for Date, Name, Surface, Tooth, Code, Description, N, D, M, Amount, Provider, Clinic, Ins, and Balance. A row for 'Prim Dental Claim - Sent 317.41' is highlighted. A dialog box titled 'Primary Dental Insurance Claim (11/14/2024) Sent' is open, showing fields for Patient, Subscriber, Employer, Billing Provider, Rendering Provider, Pay-To Provider, Carrier, Group Plan, Claim Information, and Diag. Codes. The 'Enter Payment' button is highlighted.

The screenshot shows the 'Enter Insurance Payment' dialog box. Fields include Operator, Collecting Clinic, Date (05/01/2026), Amount (12.78), Pre-Auth Number, Claim Clinic, Encounter #, Check #, Bank/Branch #, Payment Type (radio buttons for Check Payment and Electronic Payment), and Adjust YTD Benefits/Deductible. A section for 'Deductible Applied For Claim' has Standard, Preventive, and Other amounts (all 0.00). An 'Enter Adjustment' section has a dropdown set to 'None' and a Total Amount field. An 'OK/Post' button is highlighted. A table at the bottom shows procedure details with columns for Date, T..., Surface, Code, Description, Provider, Charge, Oth Ins, Guar Cr, Ins Est, Ins Amt, Applied, and Balance. The 'Applied' column for the last row is highlighted with a value of 12.78.

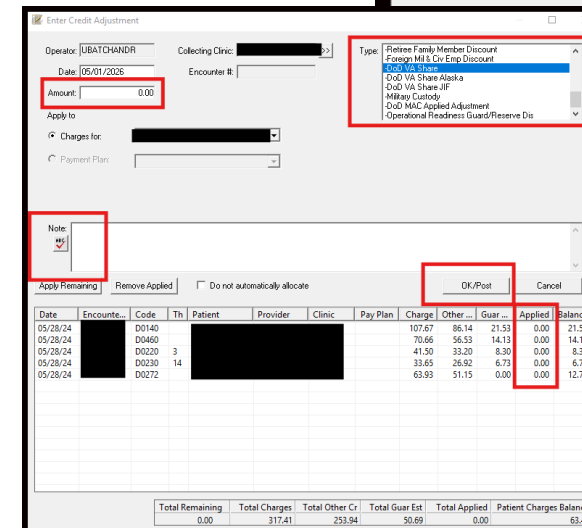
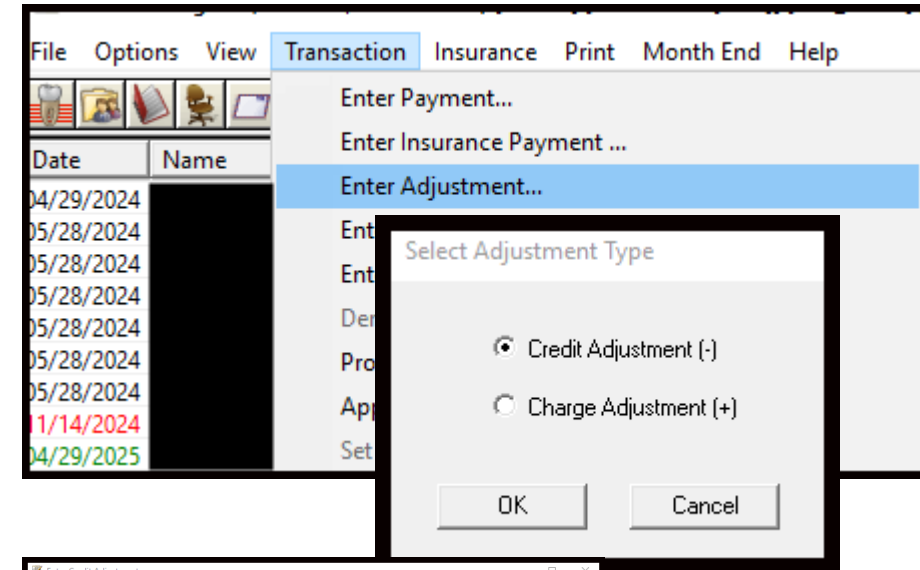


# Posting an Adjustment



- 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

