

How to Configure and Apply Automatic Tax Settings

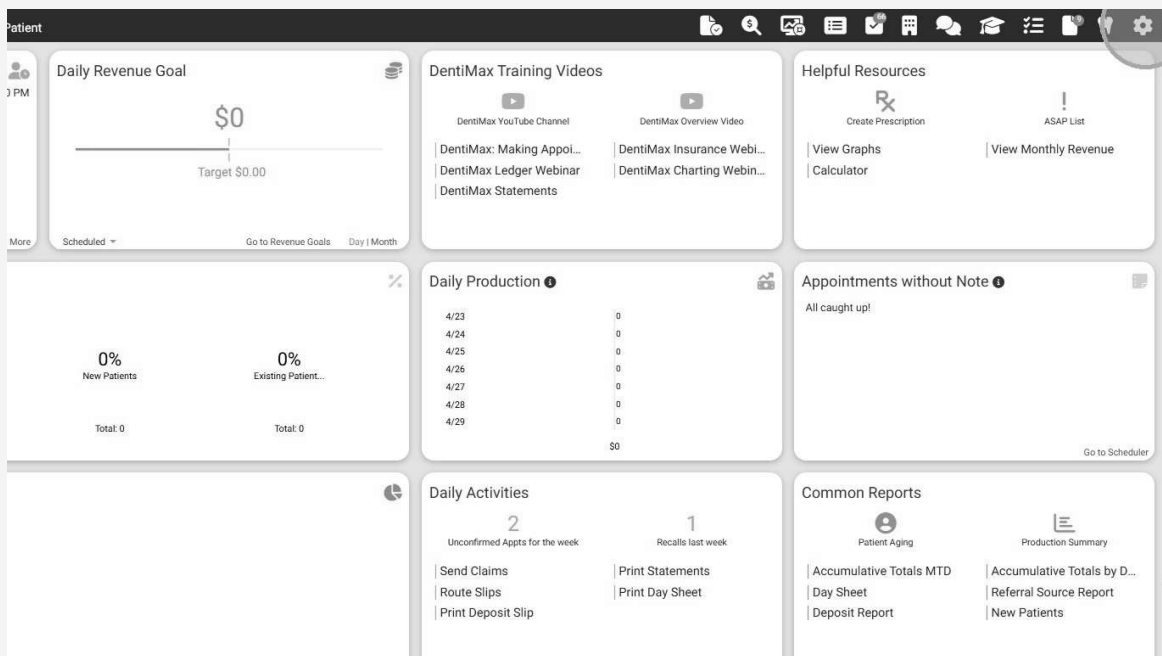
Learn how to enable automatic tax calculations and apply them to specific service codes within your system. This guide ensures your financial records remain accurate by walking you through the necessary administrative settings and transaction updates.

System Tax Configuration

1 There are going to be two step to setting up the auto tax in your system.

First you will need to set the auto tax and percent in the practice setup.

Click on the gear icon on the upper right corner



2

Click "Setup"

The screenshot shows the DentiMax dashboard with the following sections:

- Daily Revenue Goal:** A progress bar showing \$0 against a target of \$0.00.
- DentiMax Training Videos:** Links to YouTube Channel, Overview Video, Making Appointments, Insurance Webinars, Ledger Webinar, and Charting Webinar.
- Helpful Resources:** Links to Create Prescription, View Graphs, Calculator, and View Monthly Revenue.
- Daily Production:** A table showing production for dates 4/23 through 4/29, with a total of \$0.
- Appointments without Note:** A section indicating 'All caught up!'.
- Daily Activities:** Links to Send Claims, Route Slips, Print Deposit Slip, Print Statements, Print Day Sheet, and Recalls last week.
- Common Reports:** Links to Patient Aging, Production Summary, Accumulative Totals MTD, Accumulative Totals by D..., Day Sheet, Referral Source Report, Deposit Report, and New Patients.

A callout bubble in the top right corner highlights the 'Practice Setup' link, with a sub-menu showing 'User: Tiffany Nichols', 'User Profile Settings', and 'Logout'.

3

Click "Data Settings"

The screenshot shows the 'Practice Information' form with the following fields:

- Practice Name:** *John's Dental Practice
- Street:** 1313 Mockingbird Ln
- Street 2:** Ste 102
- City:** Chatham
- State:** IL
- Postal Code:** 62629
- Country:** United States - US
- Phone 1:** (480) 555-5555
- Phone 2:**
- Fax:**
- Bank Account:**
- Default Area Code:**
- Tooth System:** JP

A callout bubble in the top navigation bar highlights the 'Data Settings' tab, which is part of the 'Select Patient' dropdown menu.

4

Click the Edit icon: yellow pencil in the upper right

The screenshot shows the 'Patient' settings page. The top navigation bar includes 'Reports', 'Statement Messages', 'Email Settings', and 'Ledger Colors'. The 'Edit' icon (a yellow pencil) is highlighted in the top right corner. The main content area is divided into several sections: 'Claim Edit Verification' (with a dropdown for 'When the claim is created'), 'Ledger' (with checkboxes for 'Hide Family Billing Options' and 'Hide Patient Billing Options'), 'Estimation' (with a dropdown for 'Collect Primary Deductible (Ignore Secondary Deductible)' and a note '* For use with Default Estimation only'), 'Tax' (with checkboxes for 'Enable Manual Tax' and 'Enable Auto Tax', a 'Tax Rate' dropdown set to '10', and a 'Tax Code' dropdown set to 'TAX - tax'), and 'Default Account Codes' (with dropdowns for 'Patient Payment Code', 'Patient Refund Code', 'Patient Adjustment Code', 'Insurance Payment Code', 'Insurance Refund Code', and 'Insurance Adjustment Code').

5

Click the box to "Enable Auto Tax" and enter the tax amount in the Tax Rate box: 1.8% in your case

The screenshot shows the 'Patient' settings page, similar to the previous one. The 'Edit' icon is no longer highlighted. In the 'Tax' section, the 'Enable Auto Tax' checkbox is now checked, and the 'Tax Rate' dropdown is highlighted with a circle, showing the value '10'. The 'Tax Code' dropdown remains set to 'TAX - tax'. The other sections remain unchanged.

6

Click the Save icon

Patient

Reports | Statement Messages | Email Settings | Ledger Colors

Default Facility
Type to search

ility Frequency
Currency Code
USD - United States dollar

ed dentition up to age
Default teeth for patients with no DOB
Primary

Claim Edit Verification
Check for Claim Errors:
When the claim is created

Ledger
☐ Hide Family Billing Options
☐ Hide Patient Billing Options

Estimation
Estimation
Collect Primary Deductible (Ignore Secondary Deductible)
* For use with Default Estimation only

Tax
☐ Enable Manual Tax
☒ Enable Auto Tax
Tax Rate: 1.8
Tax Code: TAX - tax

Default Account Codes

Patient Payment Code PATCHECK - Patient Check Pymt	Patient Refund Code REFUND - Refund to Patient	Patient Adjustment Code PATADJ - Adjustment
Insurance Payment Code INSCHECK - Insurance Check Payment	Insurance Refund Code INSREFUND - Insurance Refund	Insurance Adjustment Code INSADJ - Insurance Adjustment

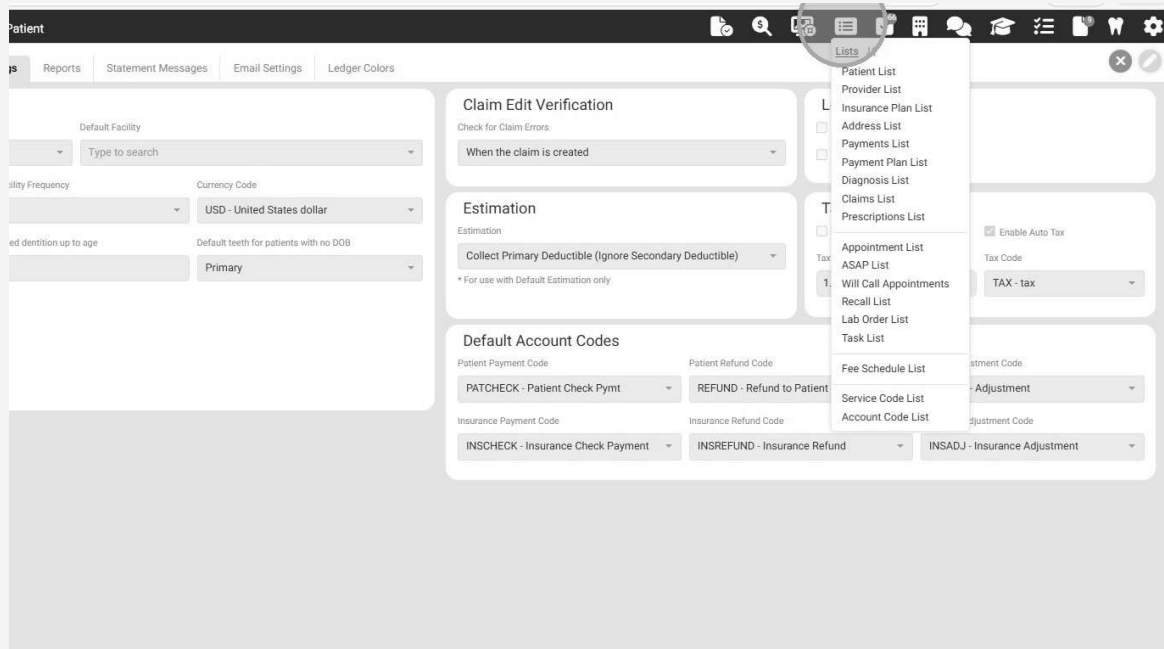
Save

Service Code Setup

7

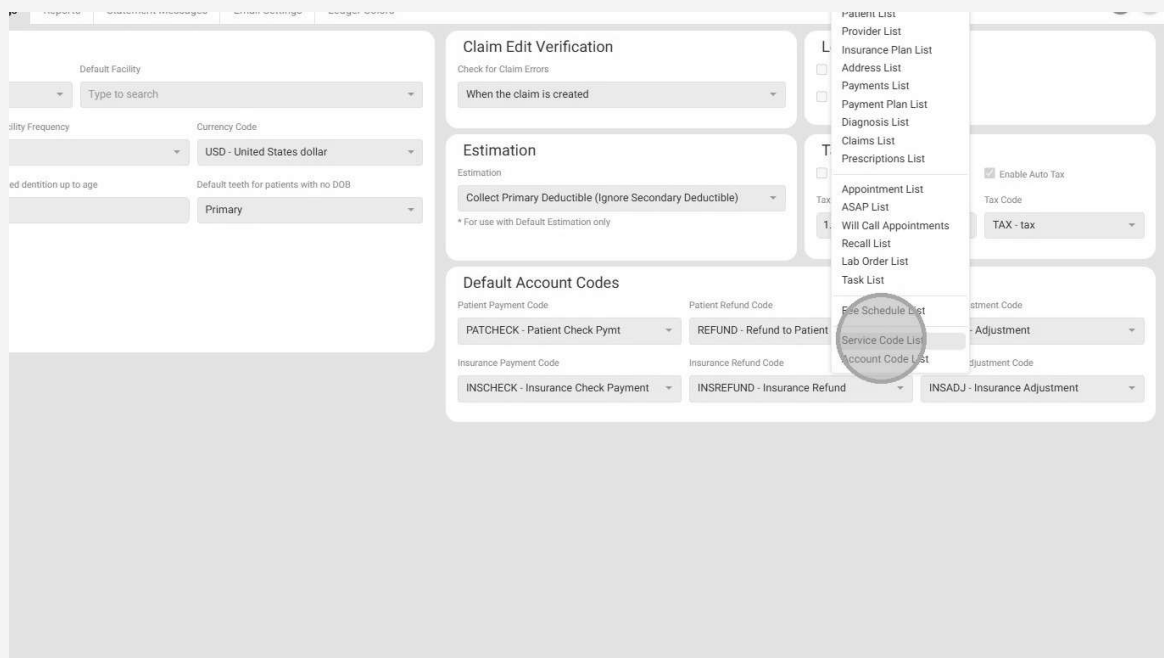
Step two: You will need to make the procedure codes as taxable

From the Lists menu



8

Click "Service Code List"



9

Search for the procedure code that you want to set as taxable

The screenshot shows the 'Service Code List' interface. At the top, there is a navigation bar with the 'flow' logo and several icons. Below the navigation bar, the title '< Service Code List' is displayed. A search bar is located at the top of the list, with the word 'Search' inside it. Below the search bar, there is a table with three columns: 'Code', 'Description', and 'Amount'. The table contains 20 rows of data, each representing a different service code and its corresponding amount.

Code	Description	Amount
00112	Comp Exam Child	\$0.00
11111	Cigna Upgrade Fee	\$0.00
125	Perio Chart	\$0.00
130	Chart Patient / HH	\$0.00
2123	Omni Products	\$0.00
22222	EDS Lab Fee	\$0.00
2323	Bleach Tray Impressions	\$0.00
5006	adjustment	\$0.00
6999	seat bridge	\$0.00
9431	Office Visit	\$0.00
BalDe	Dentrix Forward Balances	\$500.00
C0001	Cracked Tooth	\$0.00
C0002	Impacted Mesial	\$0.00
C0003	Impacted Distal	\$0.00
C0004	Abcess	\$0.00
C0005	Watch Tooth	\$0.00
C0006	Hypersensitive	\$0.00
C0007	Recession	\$0.00
C0008	Missing Tooth	\$0.00
C0009	Caries/Decay	\$0.00
C0010	Incipient Caries	\$0.00

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Select the service code from the results

The screenshot shows the 'Service Code List' interface. The search bar now contains the text 'D0150'. The table below the search bar has been filtered to show only one row, which is highlighted. The row contains the code 'D0150', the description 'comprehensive oral evaluation - new or established', and the amount '\$64.50'.

Code	Description	Amount
D0150	comprehensive oral evaluation - new or established	\$64.50

11 Click "Taxable" to make this procedure code as taxable

Account Code Entry

Code: D0150

Type: Fee for Service Description: comprehensive oral evaluation - new or establi Service Category: Diagnostic Treatment Area: Mouth

Abbreviation: CompEx Code 2: Code 3: Code 4:

Appointment Length (Minutes): 10

☒ Taxable ☐ Inactive

☐ Recall Transaction
☐ Use Assigned Hygienist for this service
☐ Do Not Bill Insurance

12 Click "Save Changes"

Account Code Entry

Code: D0150

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Appointment Length (Minutes): 10

☒ Taxable ☐ Inactive

☐ Recall Transaction
☐ Use Assigned Hygienist for this service
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Patient Transaction Management

13 To show how this works and what it looks like on the ledger:

Select the 'D0150' account code for the transaction

The screenshot shows the 'Charge Detail' form in the 'flow' software. The 'Account Code' dropdown is open, showing 'D0150 - comprehensive oral evaluation - ne...' selected. The form includes fields for Patient, Date, Billing, Provider, Status, Description, Tooth, Fee, Claim & Billing Info, and Diagnosis.

Patient	Date	Billing	Provider	Status
Appear, Miss - APPMI000	04/29/2026	(Auto) [Facility:]	Arquette, David - ARQ00	Comple

Account Code	Description	Tooth	Fee
D0150			
D0150 - comprehensive oral evaluation - ne...			

Claim & Billing Info

Place of Service: Office Unit of Time:

☐ Do Not Bill Insurance
☐ Do Not Bill Patient
☐ Insurance 1 Completed Payment
☐ No Insurance 2

Diagnosis

☐ Diagnosis 1 ☐ Diagnosis 2
☐ Diagnosis 3 ☐ Diagnosis 4

14 Click "Save Changes"

The screenshot shows the 'Charge Detail' form in the 'flow' software. The 'Save Changes' button is highlighted in the left sidebar. The form shows the 'D0150 - comprehensive oral evaluation - n...' account code selected, with a description of 'comprehensive oral evaluation - new or established patient' and a fee of '\$43.00'.

Patient	Date	Billing	Provider	Status
Appear, Miss - APPMI000	04/29/2026	(Auto) [Facility:]	Arquette, David - ARQ00	Comple

Account Code	Description	Fee
D0150 - comprehensive oral evaluation - n...	comprehensive oral evaluation - new or established patient	\$43.00

Claim & Billing Info

Place of Service: Office Unit of Time:

☐ Do Not Bill Insurance
☐ Do Not Bill Patient
☐ Insurance 1 Completed Payment
☐ No Insurance 2

Diagnosis

☐ Diagnosis 1 ☐ Diagnosis 2
☐ Diagnosis 3 ☐ Diagnosis 4

Facility Selection and Verification

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On the ledger you will see the procedure code then the Tax right under for the correct amount based on the procedure amount.

- Transactions
 - New Billing
 - New Transaction
 - Use a Multicode
 - Post From Treatment Plan
 - Adjust Deductible
 - Adjust Benefits Used
- Enter a Payment
 - New Pat Payment/Adj
 - New Insurance Payment
 - Issue a Patient Refund
- Patient Info
 - View Chart
 - View Prescriptions
- Claim Info
 - Create Claim
 - Print Claim
- Print
 - Print Walk-Out
 - Print Statement
 - Print Ledger

Patient

Appear, Miss - APPMI000

☒ Show All Recent and Open Billings
☐ Show Family
☐ Show All History
☐ Hide Zero Balances
☐ Only Ins Pending

Detail View Sort by Date

Billing Information

Insurance	Est Due	Charges:
Ins 1: Aetna PPO, None, None, None	\$43.00	Adjustments:
Ins 2: None	\$0.00	Ins Pmts:
HOH: Appear, Miss	\$421.00	Patient Pmts:
		Total:
		Current \$464.00

Search transactions

Second Office

Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1 Paid	Ins2 Paid	Update
4/29/26	Miss	1023	D0150	comprehensive oral evaluation - new or e	ARQ00			\$43.00	Completed	\$0.00				\$43.00			tiffanyx
4/29/26	Miss	1023	TAX	comprehensive oral evaluation - new or e	ARQ00			\$1.00	Completed								tiffanyx
4/14/26	Miss	1016	D0120	periodic oral evaluation - established pati	ARQ00			\$46.50	Completed	\$0.00	-\$51.50			-\$5.00			Tyler
4/14/26	Miss	1016	TAX	periodic oral evaluation - established pati	ARQ00			\$5.00	Completed								Tyler
4/14/26	Miss	1016	PATCHECI	Patient Check Pymt	ARQ00			-\$51.50	Completed								Tyler
4/14/26	Miss	1021	D0274	bitewings - four radiographic images	HYG02			\$48.00	Completed	\$0.00				\$48.00			Amdiei
4/14/26	Miss	1021	D1110	prophylaxis - adult	HYG02			\$88.50	Completed	\$0.00	-\$50.00			\$38.50			Amdiei
4/14/26	Miss	1021	TAX	prophylaxis - adult	HYG02			\$9.00	Completed								Amdiei
4/15/26	Miss	1021	PATCHECI	Patient Check Pymt	HYG02			-\$50.00	Completed								betsyak
4/14/26	Miss	1021	D0330	panoramic radiographic image	HYG02			\$87.00	Completed	-\$3.00				\$84.00			Amdiei
4/15/26	Miss	1021	INSCHECI	Insurance Check Payment	HYG02			-\$3.00	Completed								betsyak
4/14/26	Miss	1021	D0150	comprehensive oral evaluation - new or e	HYG02			\$64.50	Completed	\$0.00				\$64.50			Amdiei
4/7/26	Miss	1016	D1110	prophylaxis - adult	SAN00			\$88.50	Completed	\$0.00			-\$10.00	\$78.50			betsyak
4/14/26	Miss	1016	TAX	tax	SAN00			-\$10.00	Completed								Tyler
4/7/26	Miss	1016	D0274	bitewings - four radiographic images	SAN00			\$48.00	Completed	\$0.00				\$48.00			betsyak
4/7/26	Miss	1016	D0330	panoramic radiographic image	SAN00			\$87.00	Completed	-\$97.00			\$10.00	\$0.00			betsyak

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TIP: This Tax will not show up on any treatment estimates. My suggestion would be to add to the treatment estimate disclaimer that prints on the bottom that there will be an additional charge of 1.8% service tax.