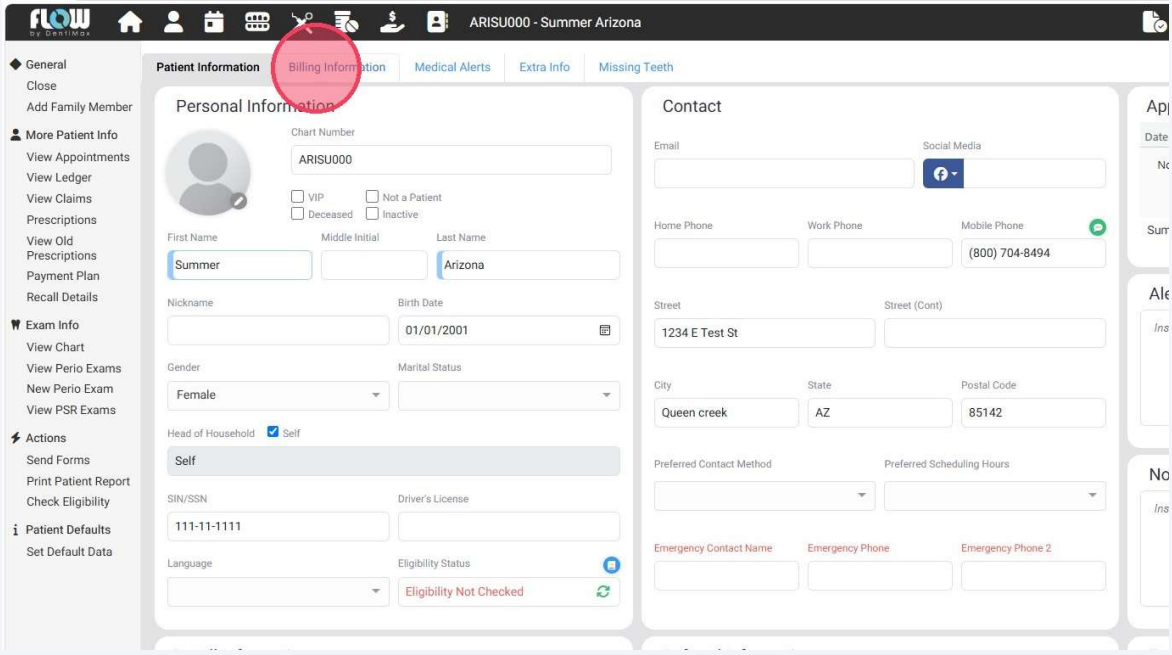
How To Manage Patient Billing And Create Insurance Claims

DentiMax
Award-Winning Digital X-Ray Sensors and Practice Management Software

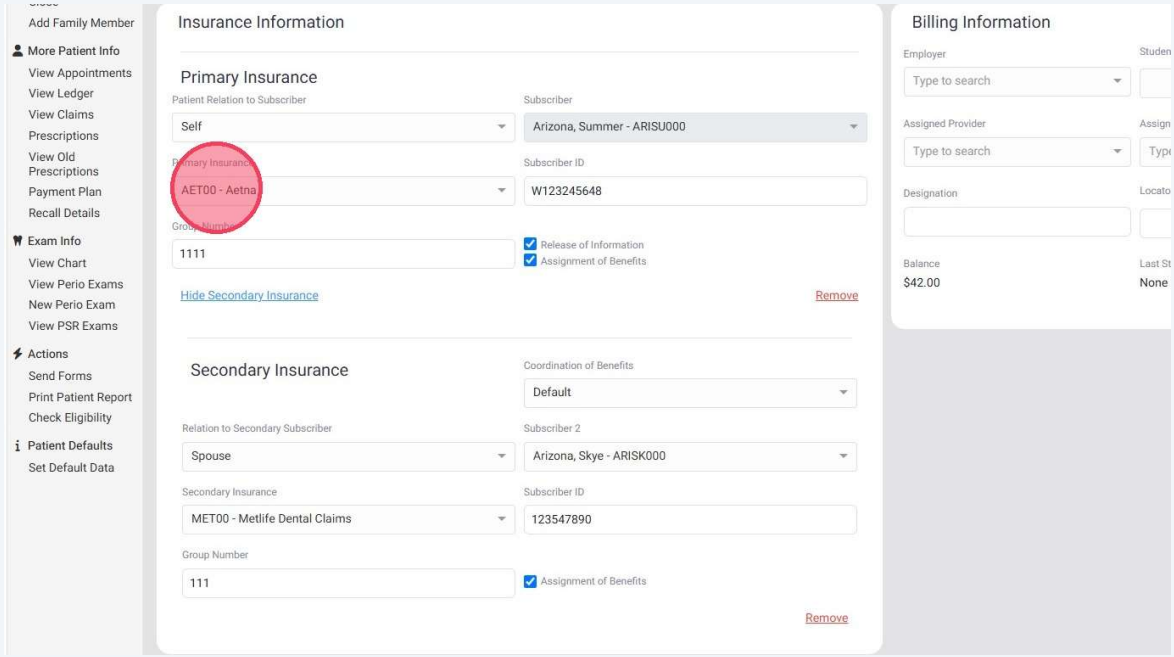
This guide provides a comprehensive walkthrough for navigating the billing ledger and creating insurance claims for patients. Learn how to accurately input transaction details and finalize your billing records to ensure timely processing.

Patient Selection

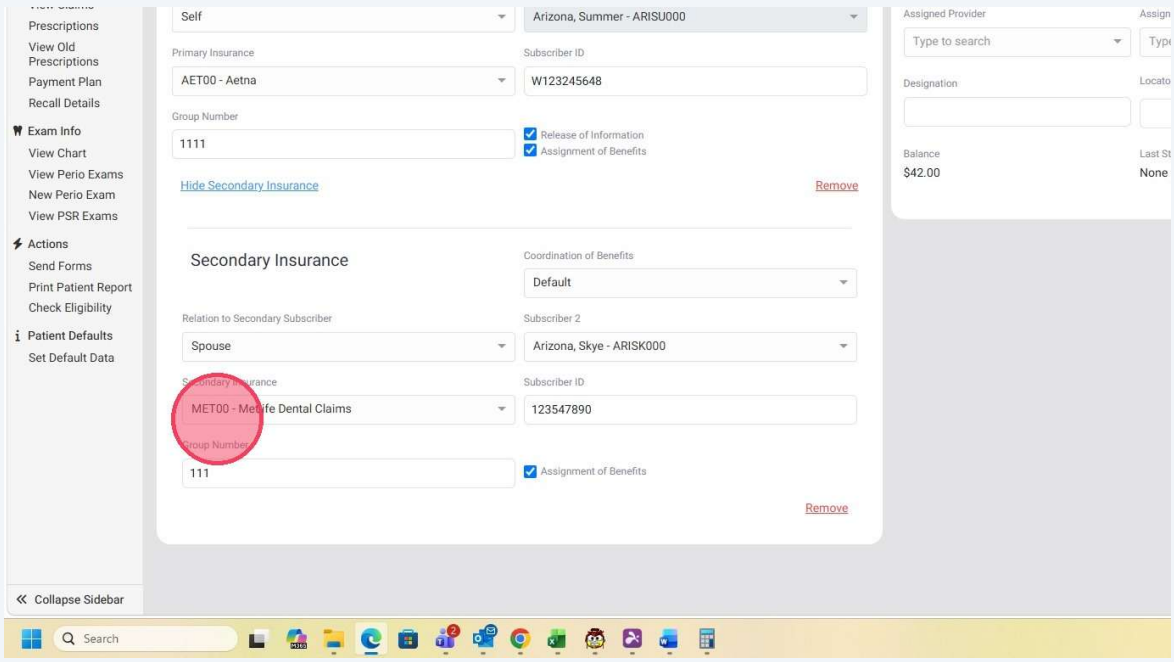
1 From a patient's profile: On the billing tab, you can view the insurance plans attached to the patient profile. This should show as the Primary and Secondary Dental Insurance policies



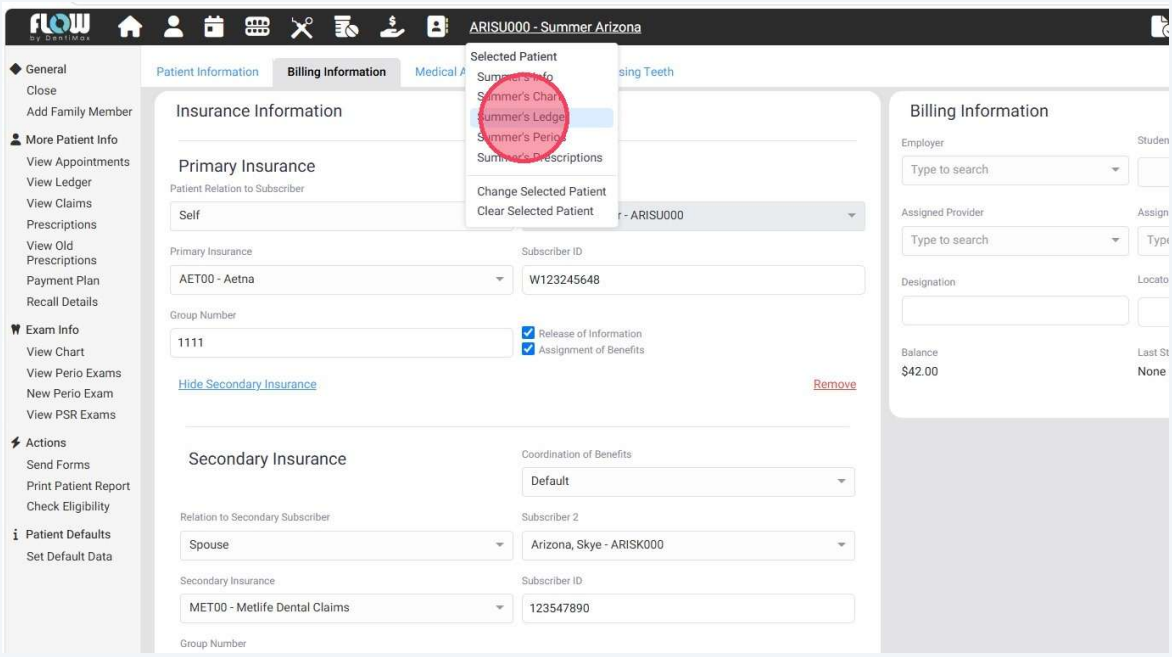
2 Primary Insurance



3 Secondary Insurance

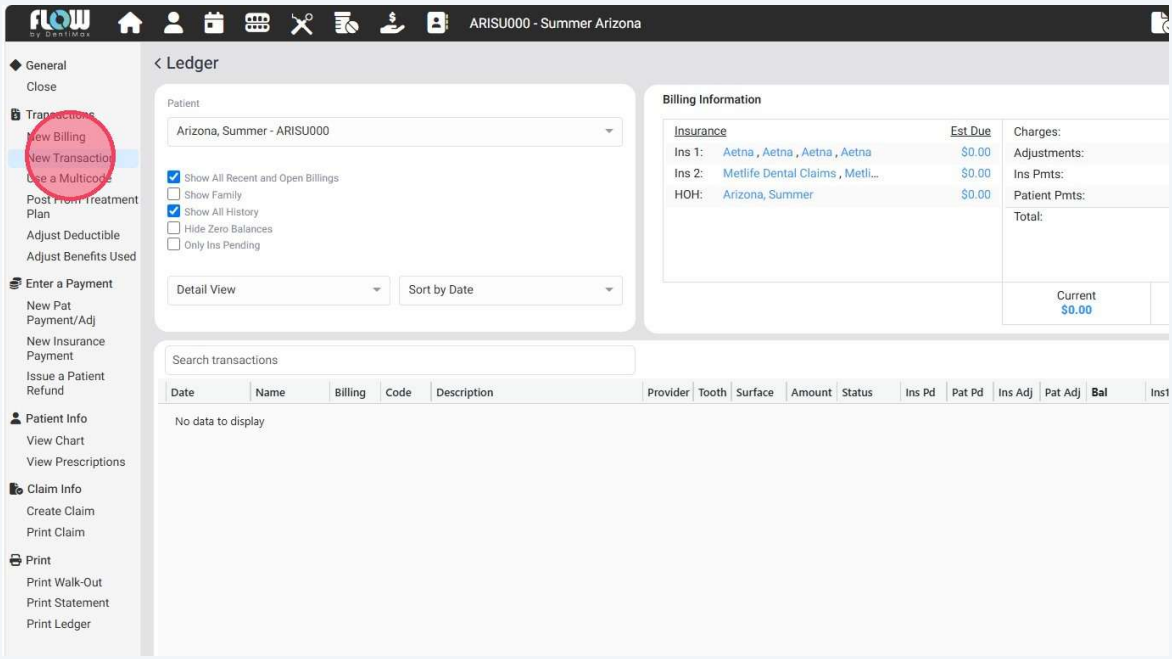


4 Navigate to patient's ledger

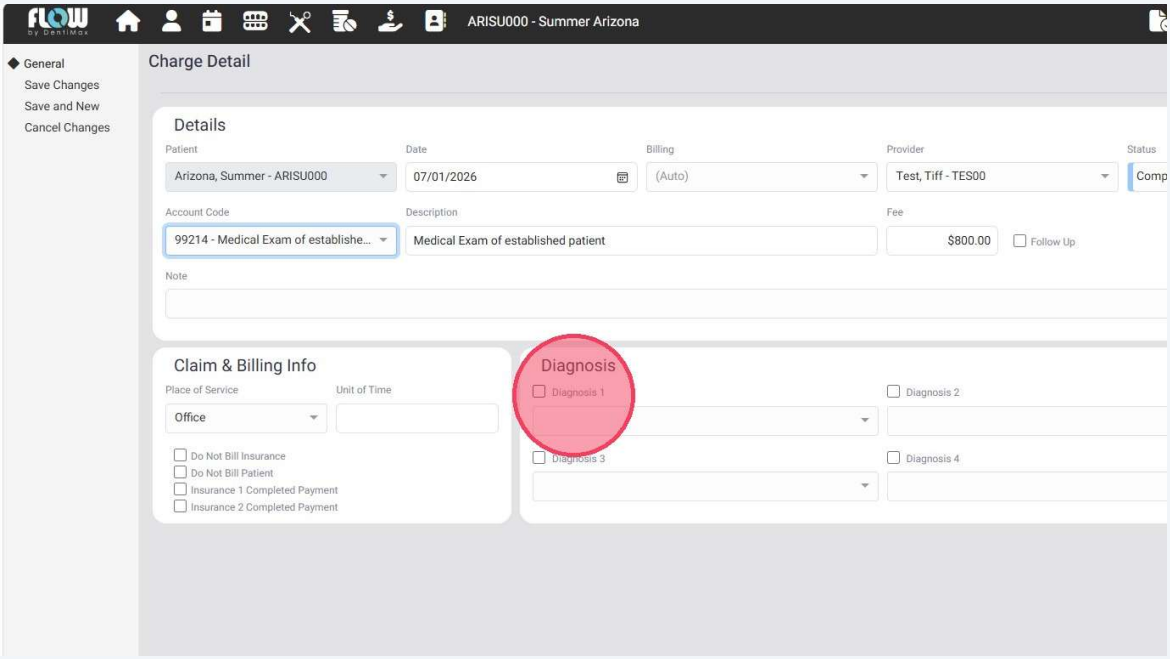


Ledger Transaction Entry

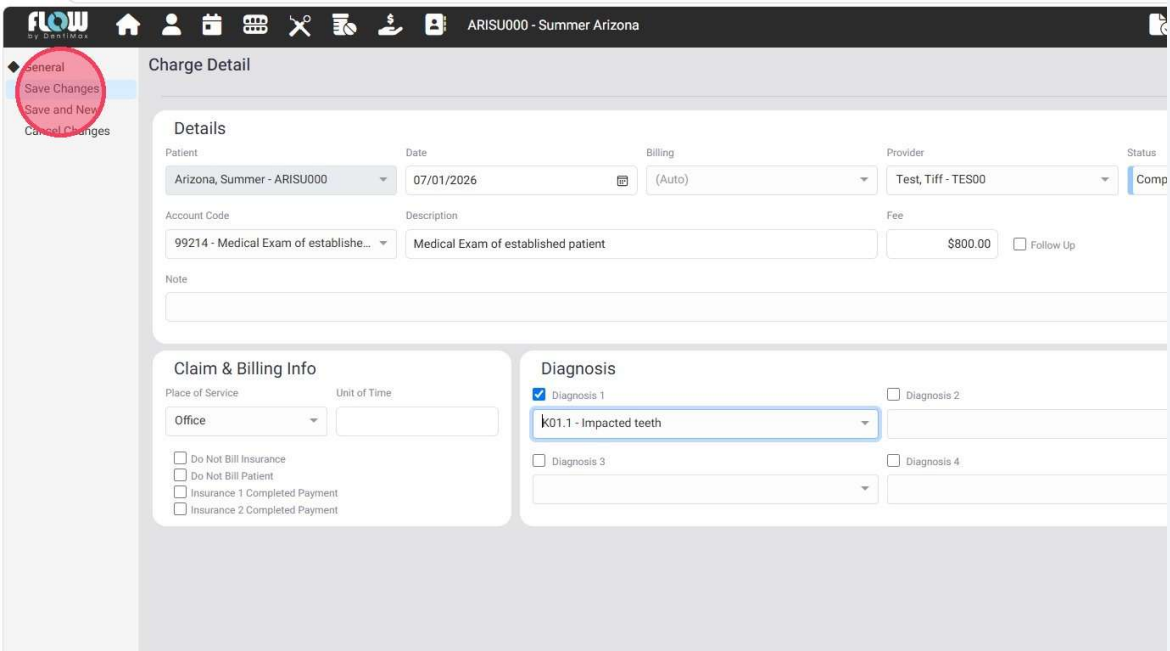
5 Add transactions to the ledger in your usual manner: from appointment, from charting, or directly in ledger



6 For any medical procedures you can enter the ICD-10 code on the correct procedure as needed

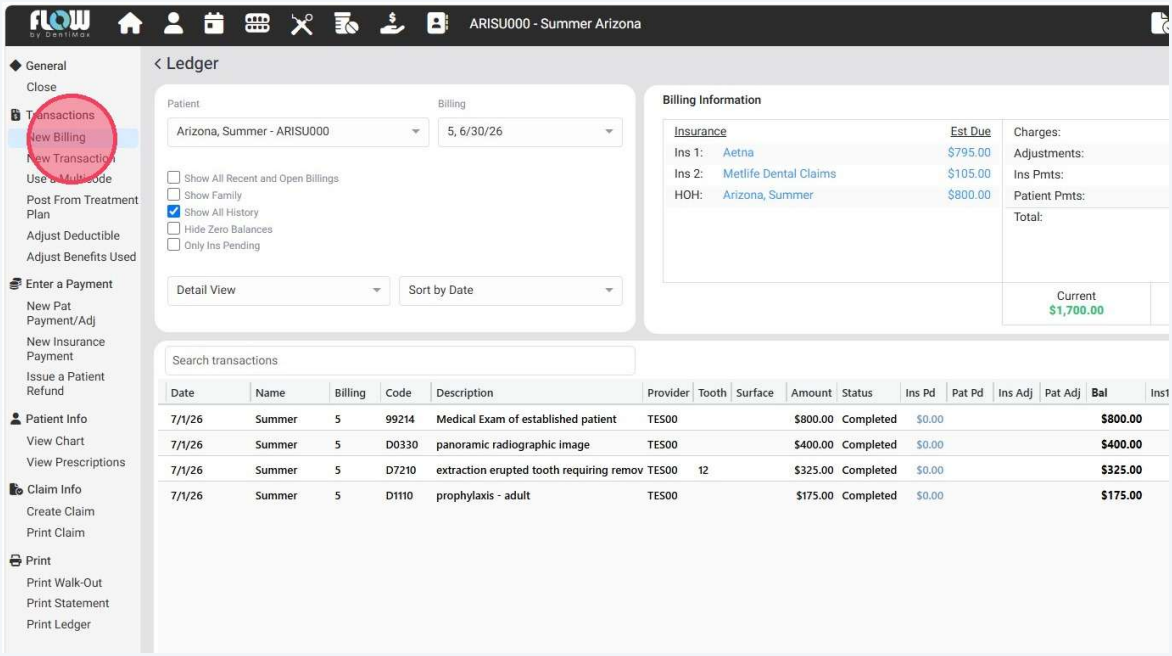


7 Click "Save Changes"

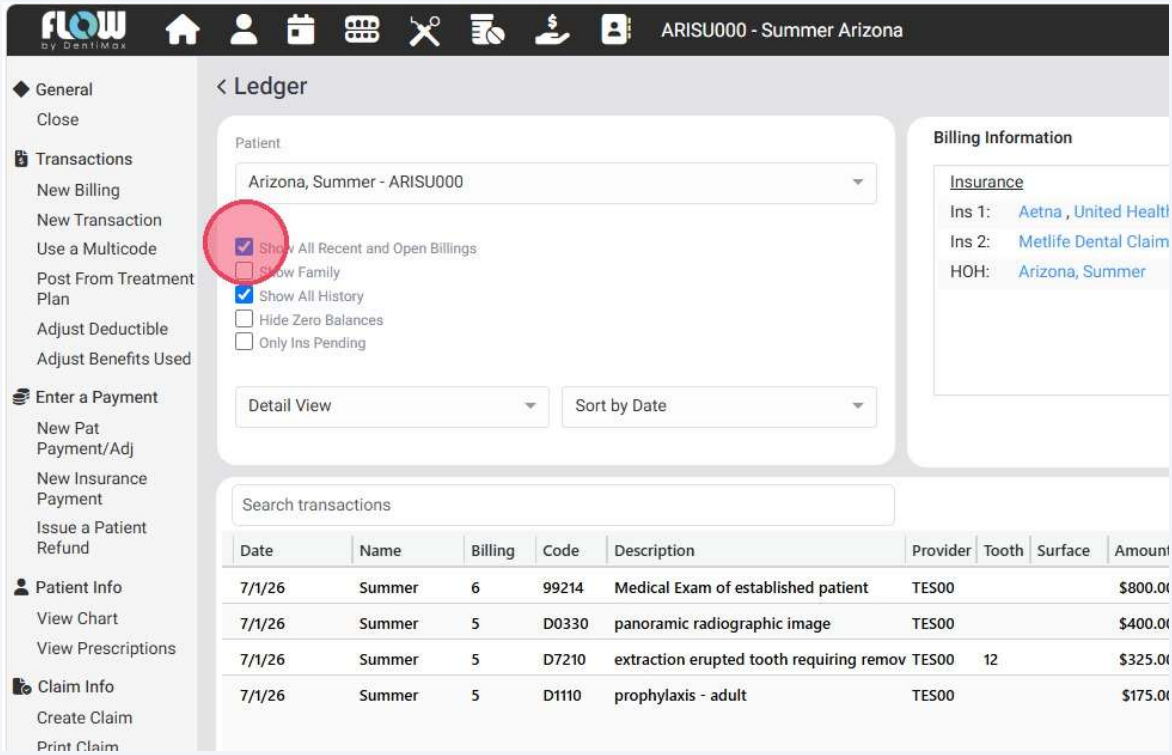


8 Click "New Billing" in the sidebar

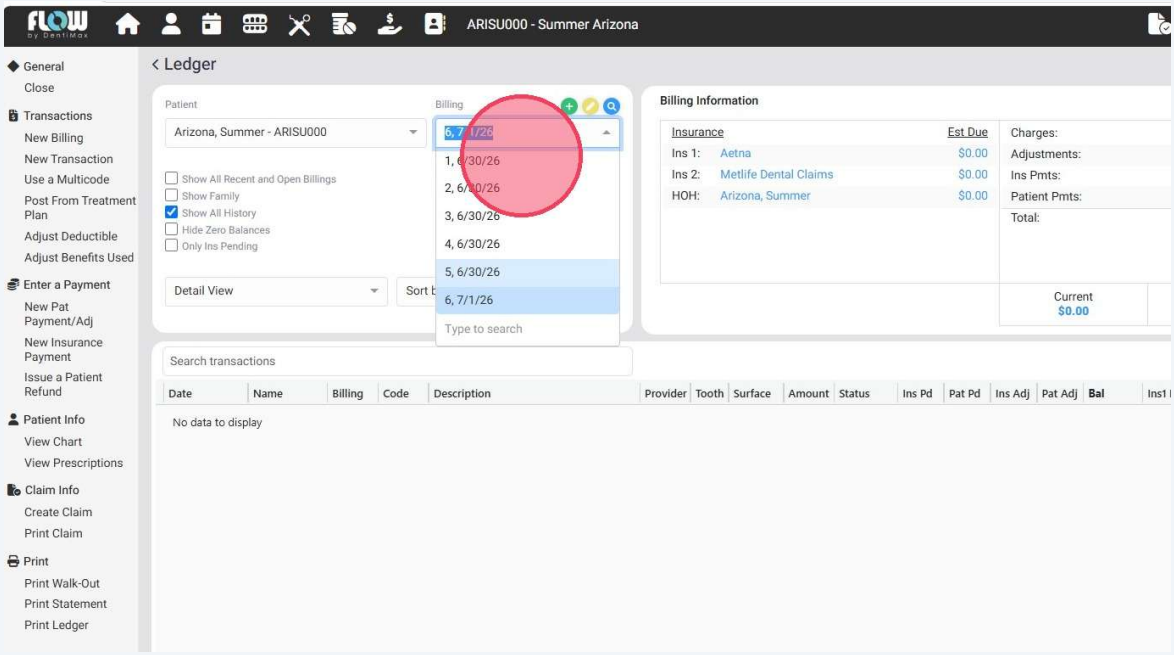
If the system does not allow you to create a new billing, there is a setting that will need to be adjusted in the practice setup. (Additional workflow will be included for this process if needed)



9 Click / Un-check "Show All Recent and Open Billings"

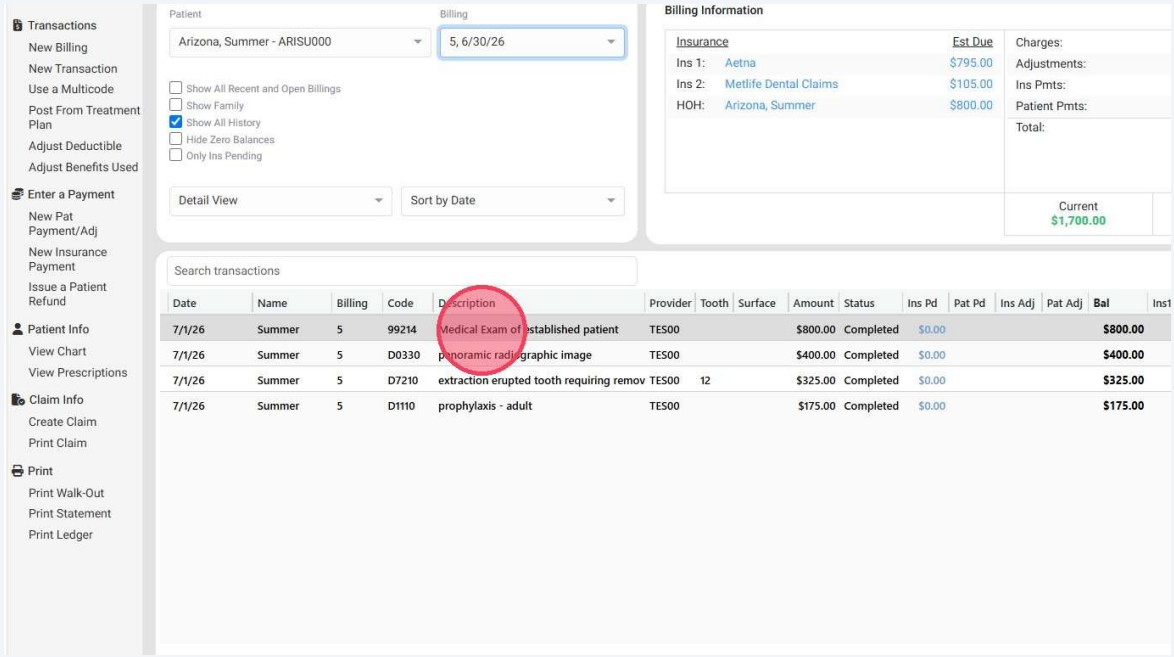


10 This will allow you to view all billings from the drop-down menu

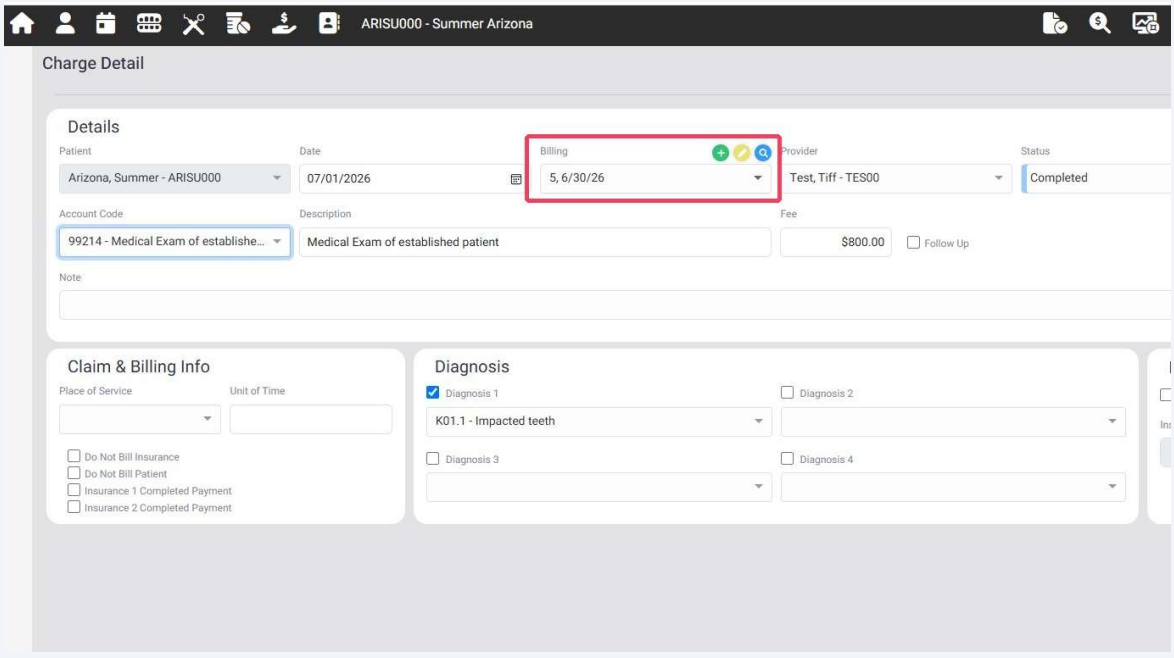


11 Now you will need to move the MEDICAL procedure(s) to the new billing number

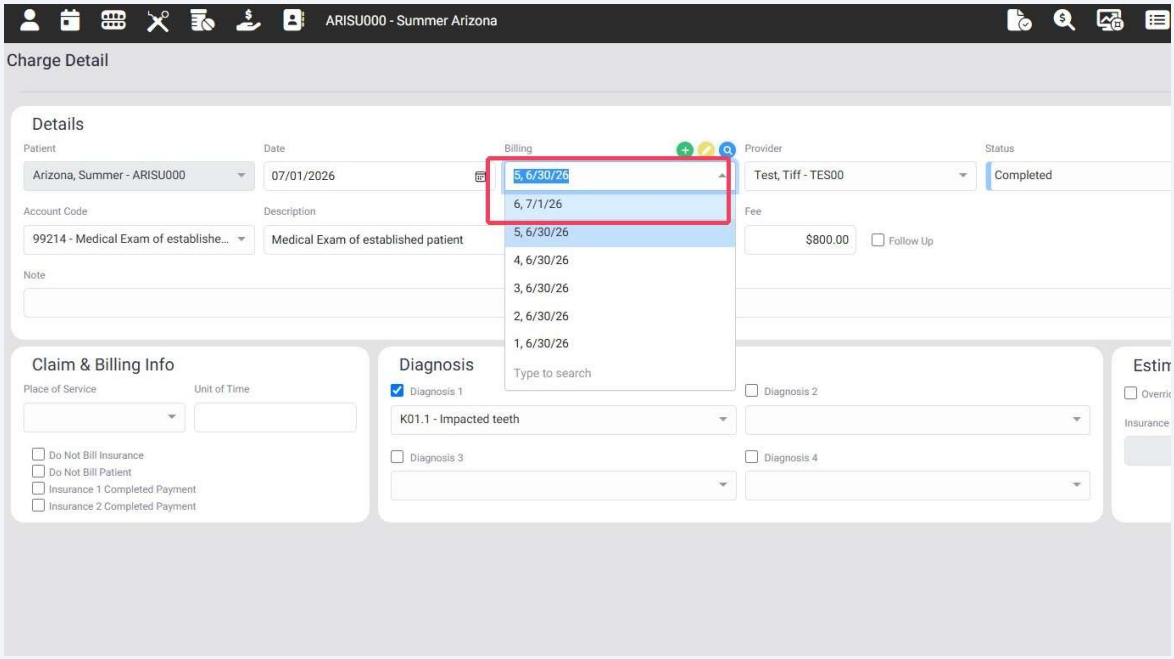
Click to open selected procedure



12 From the Charge Details Screen, under the billing selection use the drop-down menu to select the new Billing number

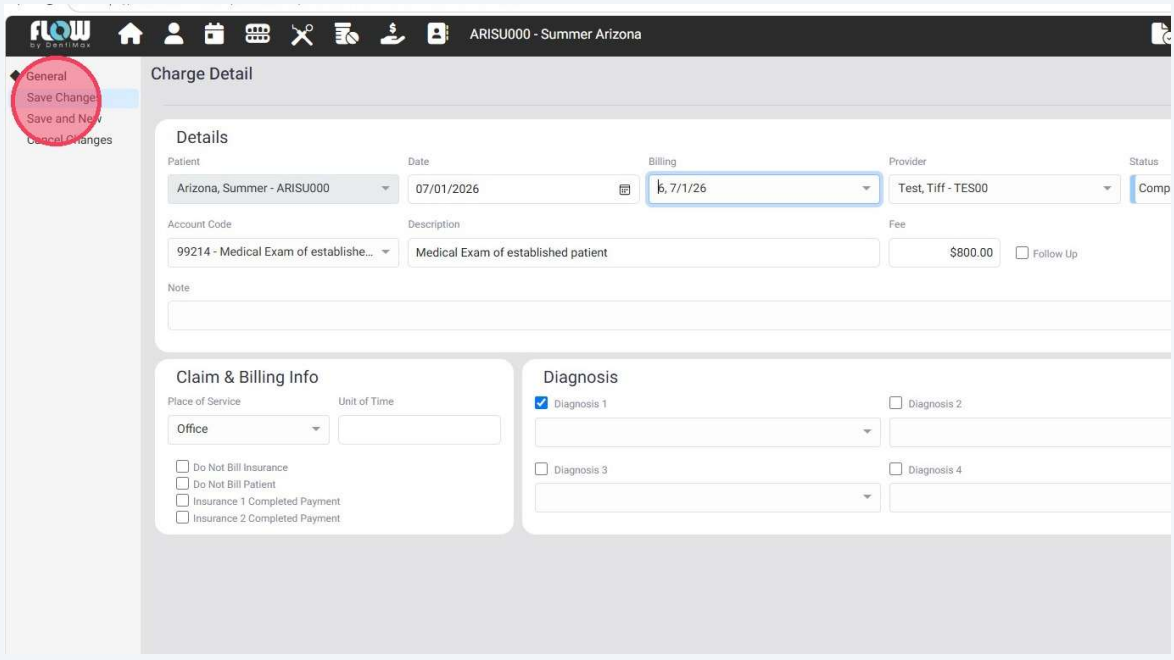


13 Click "6, 7/1/26"

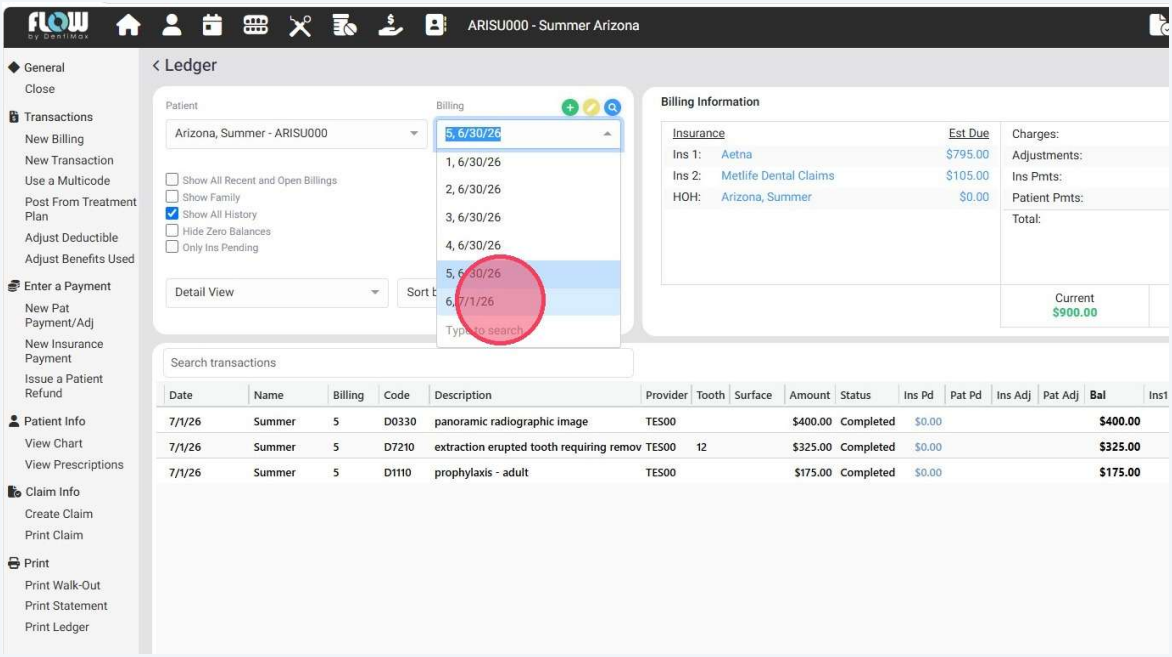


14 Click "Save Changes"

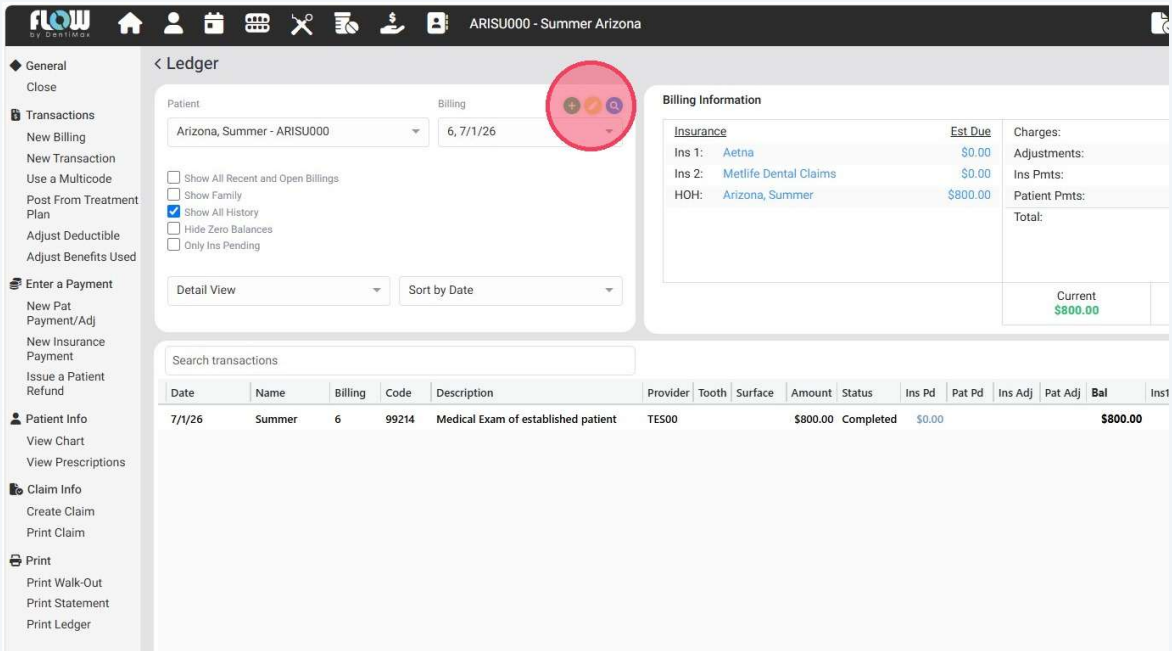
This will now move the selected procedure to the selected Billing number



15 Back on the ledger:
Select the new Billing number "ie: 6, 7/1/26" to filter the Ledger

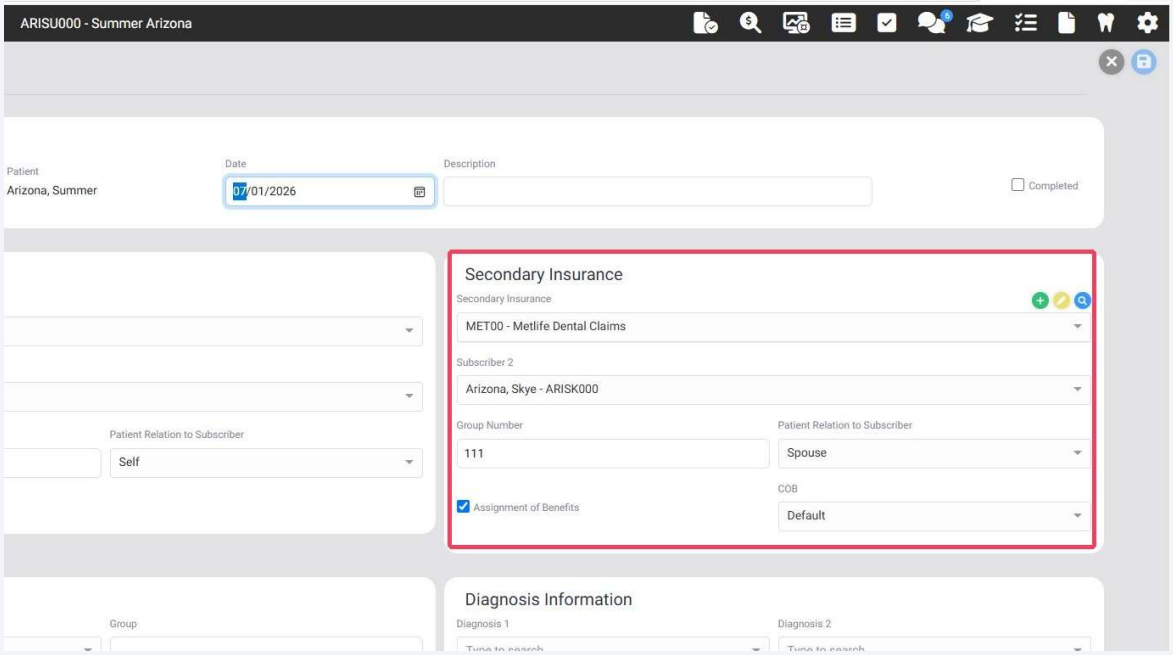


16 Click "Edit" (the yellow pencil) to modify the billing details

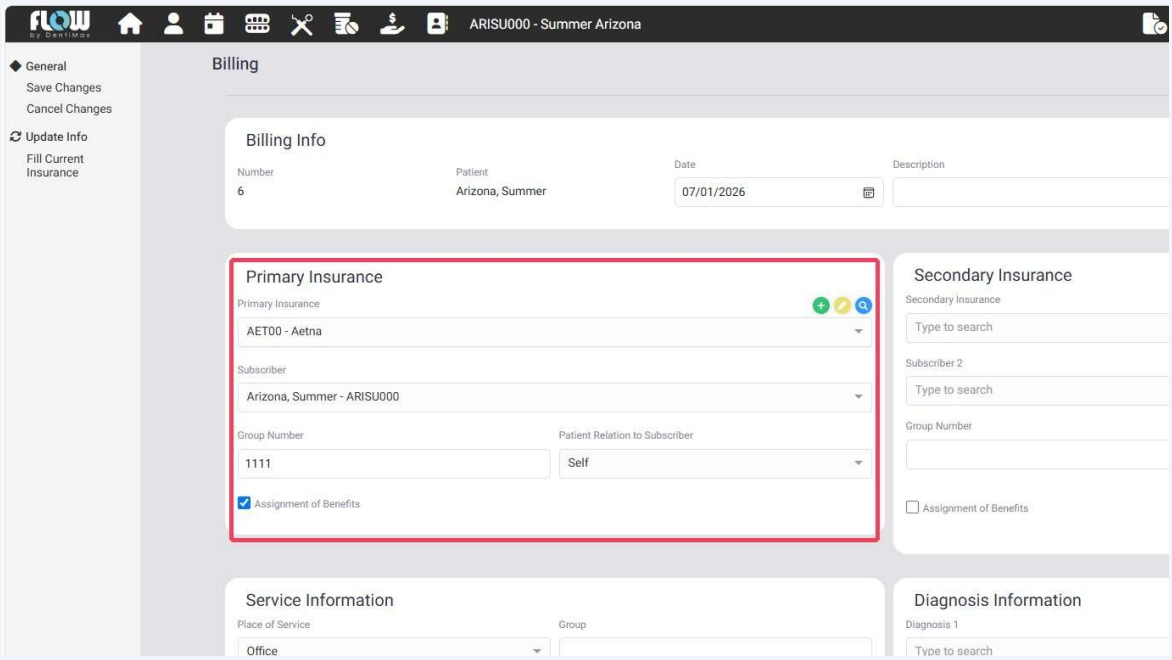


17 You will need to remove ALL of the Secondary Insurance information, including the Assignment of Benefits box

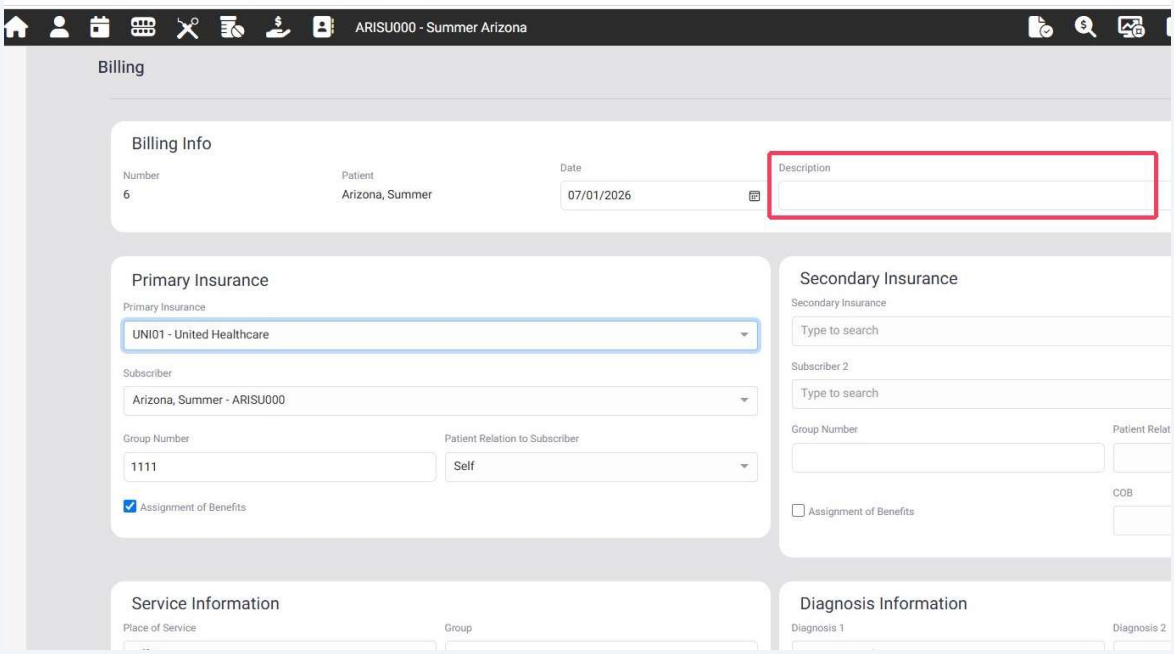
Select each field and delete



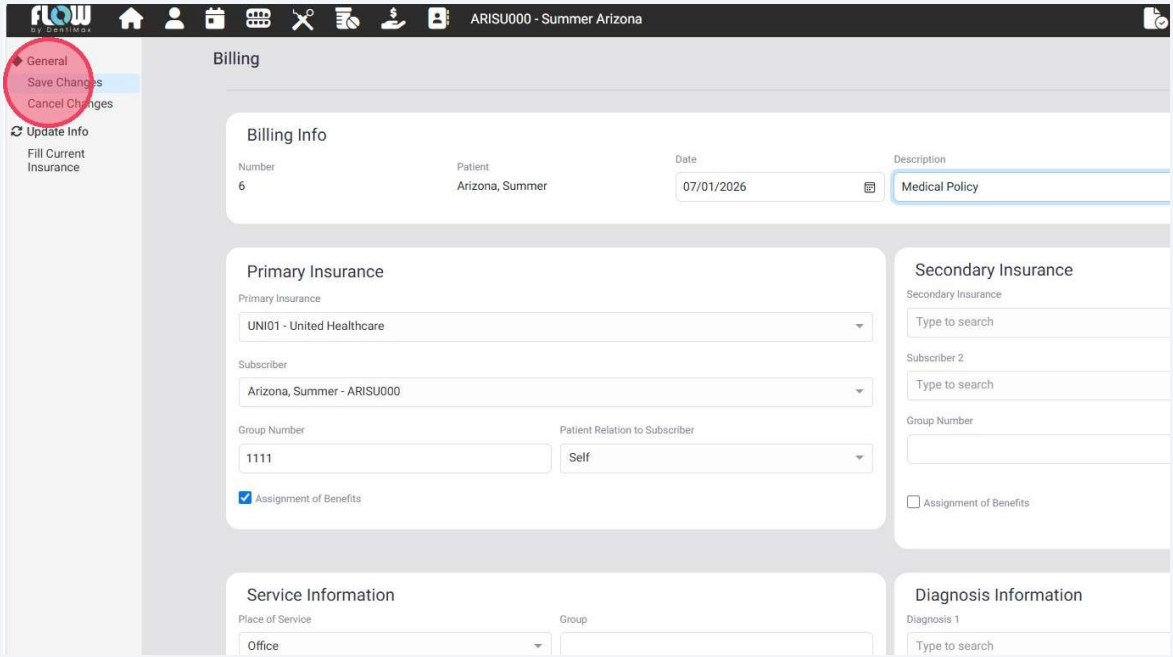
18 Move over to the Primary Insurance field. This is where you will update to the MEDICAL Insurance information.
*You will need to enter the SUBSCRIBER ID# on the actual claim form as then is no selection for it here.



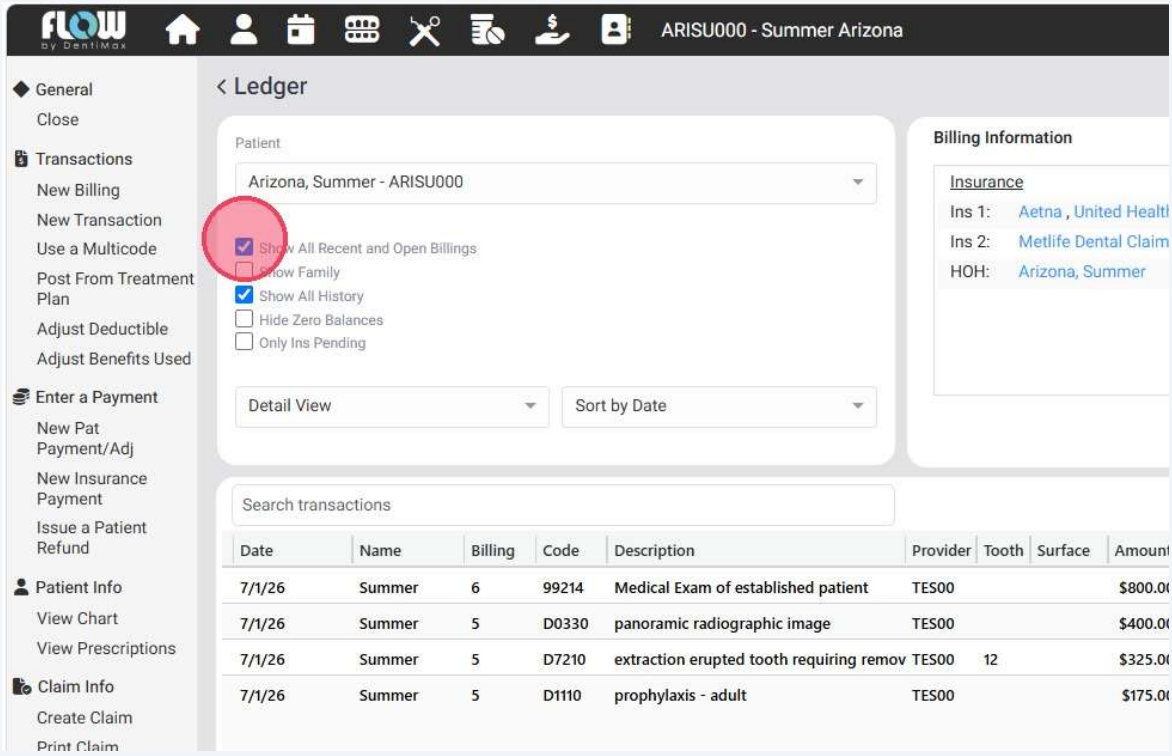
19 You can add a Description Name to this billing to identify for future use



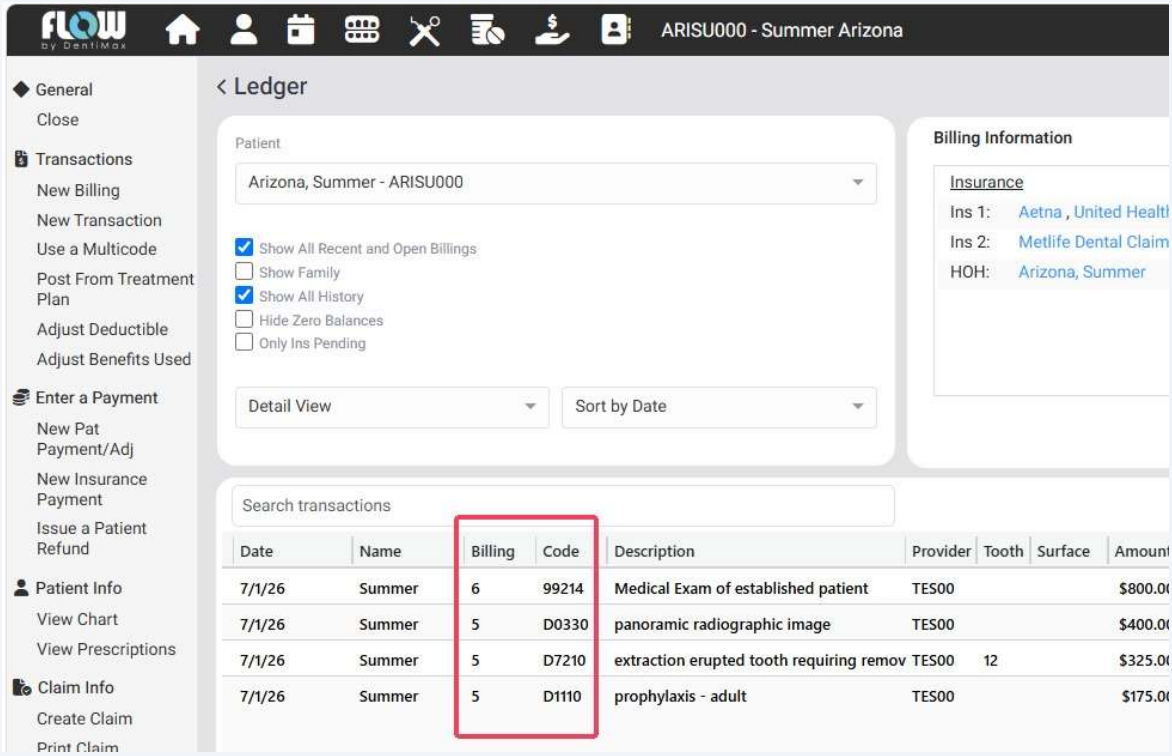
20 Click "Save Changes"



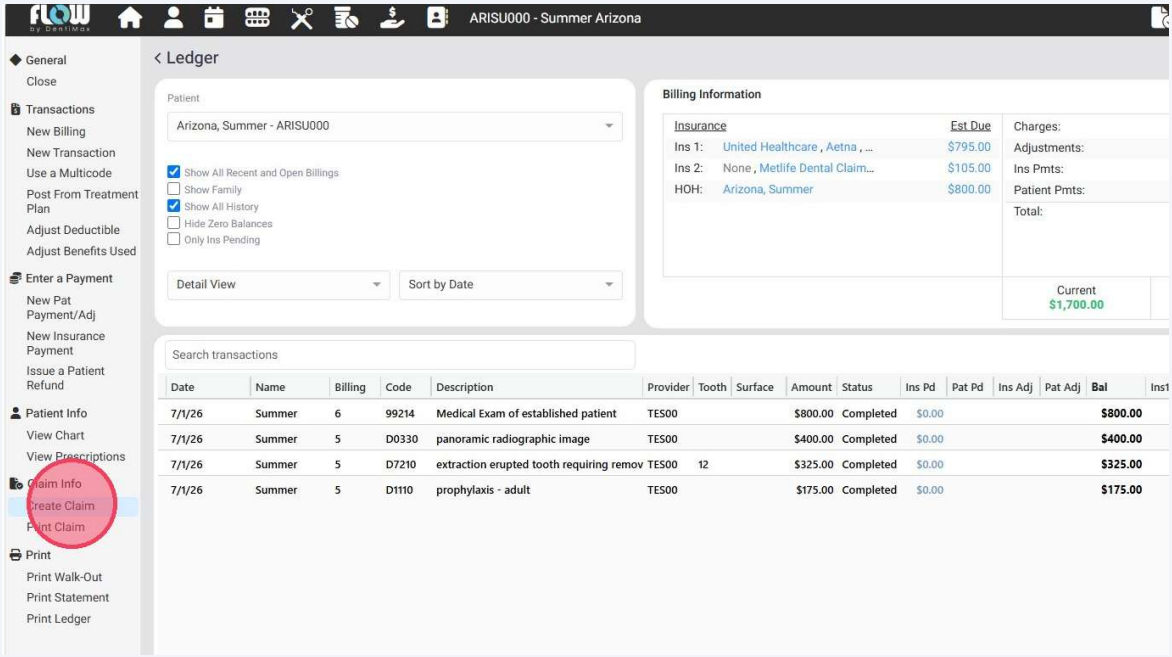
21 Back on the patient ledger: You are going to Re-Check the "Show All Recent and Open Billings"



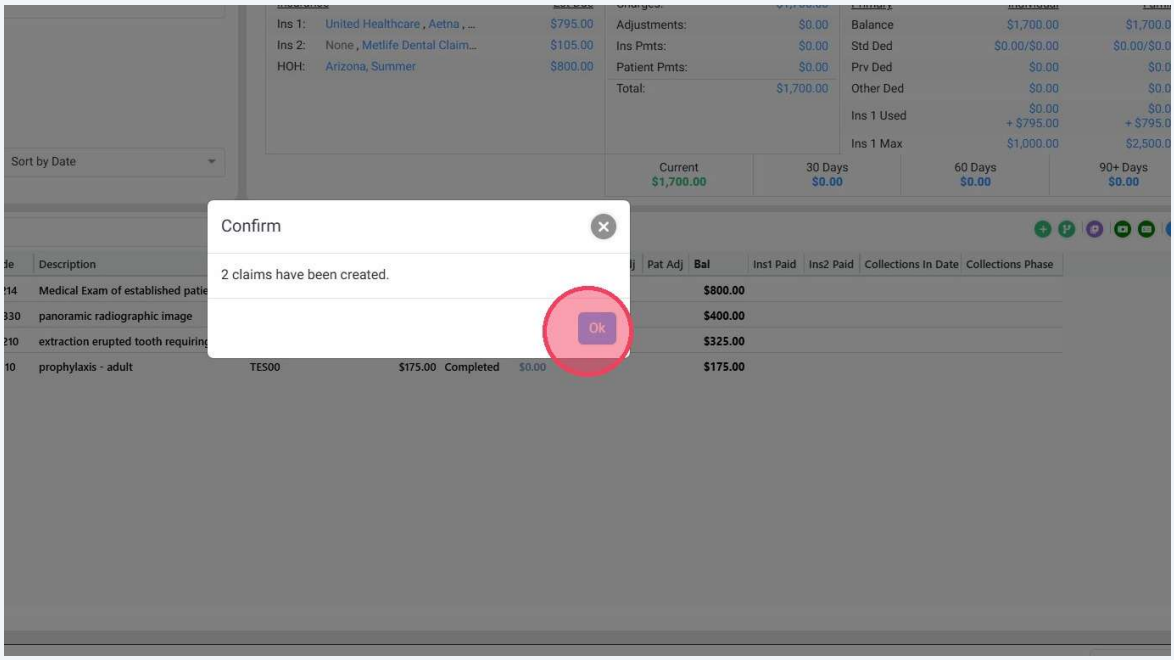
22 You will now see that the procedures are listed under separate Billing numbers



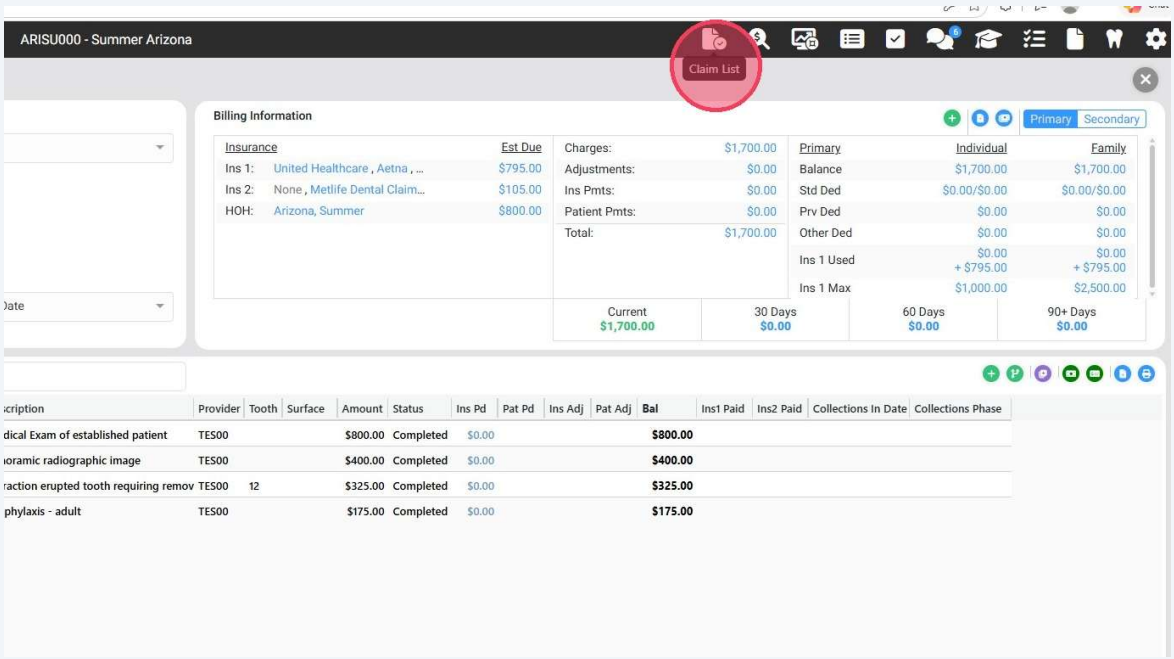
23 Now you can click "Create Claim" for the individual Billing numbers



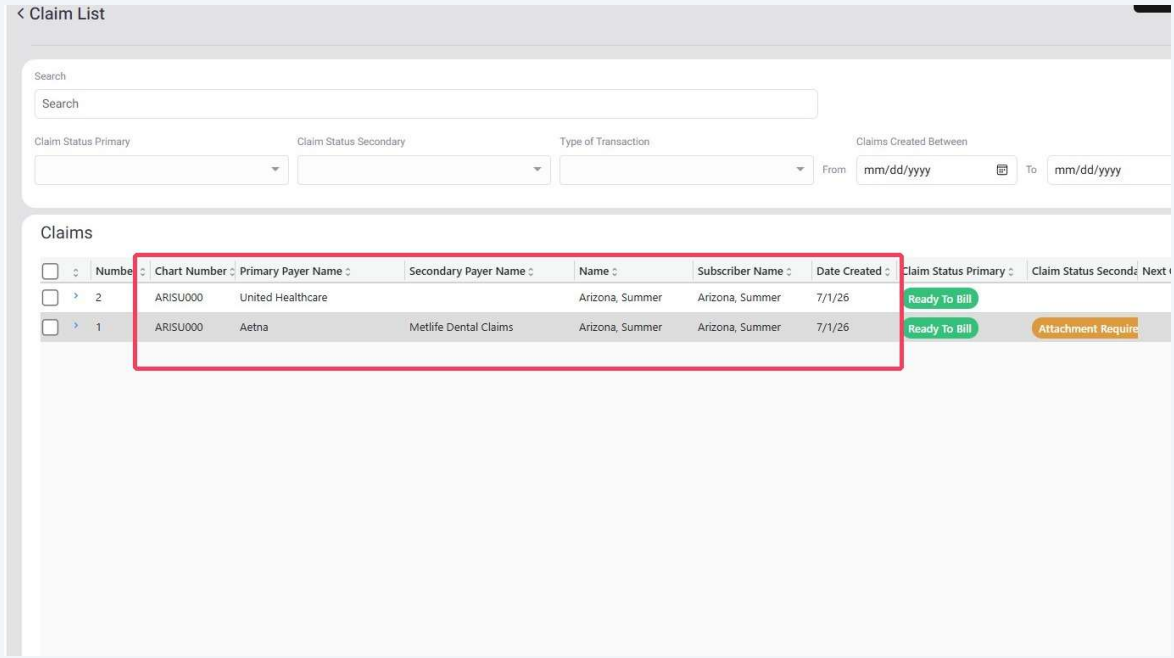
24 Click "Ok"



25 Click "Claim List"

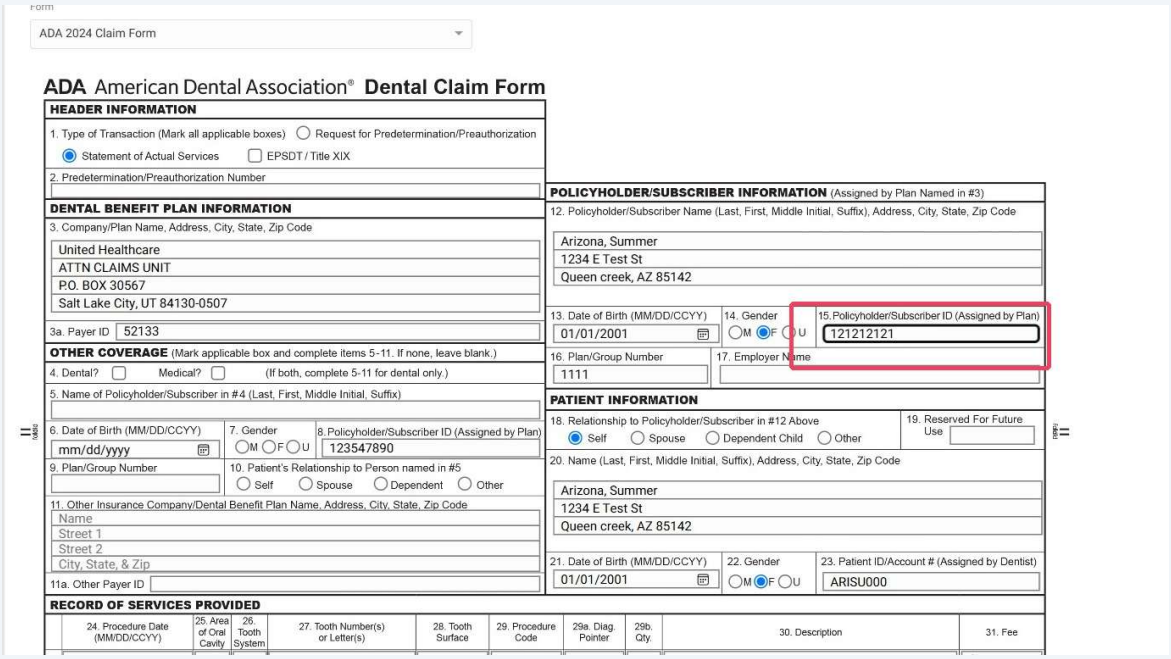


26 Now you can see the claims separated by Billings with the appropriate insurance attached



27 You will need to open the MEDICAL CLAIM form and update the SUBSCRIBER ID# to the correct MEDICAL ID#.

This step will need to be done on each MEDICAL CLAIM FORM



28 Click "Save Changes"

Claim is now ready to be printed on the MEDICAL CLAIM FORM as usual