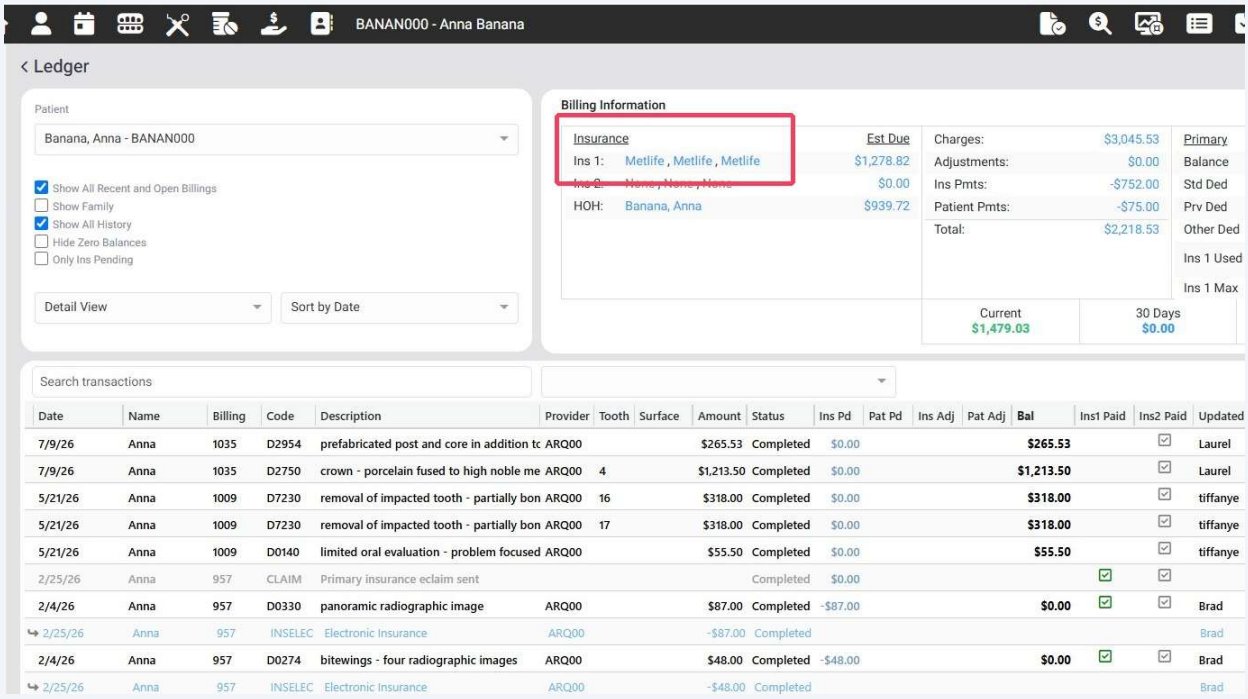
How to Manage Patient Billing and Insurance Claims

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

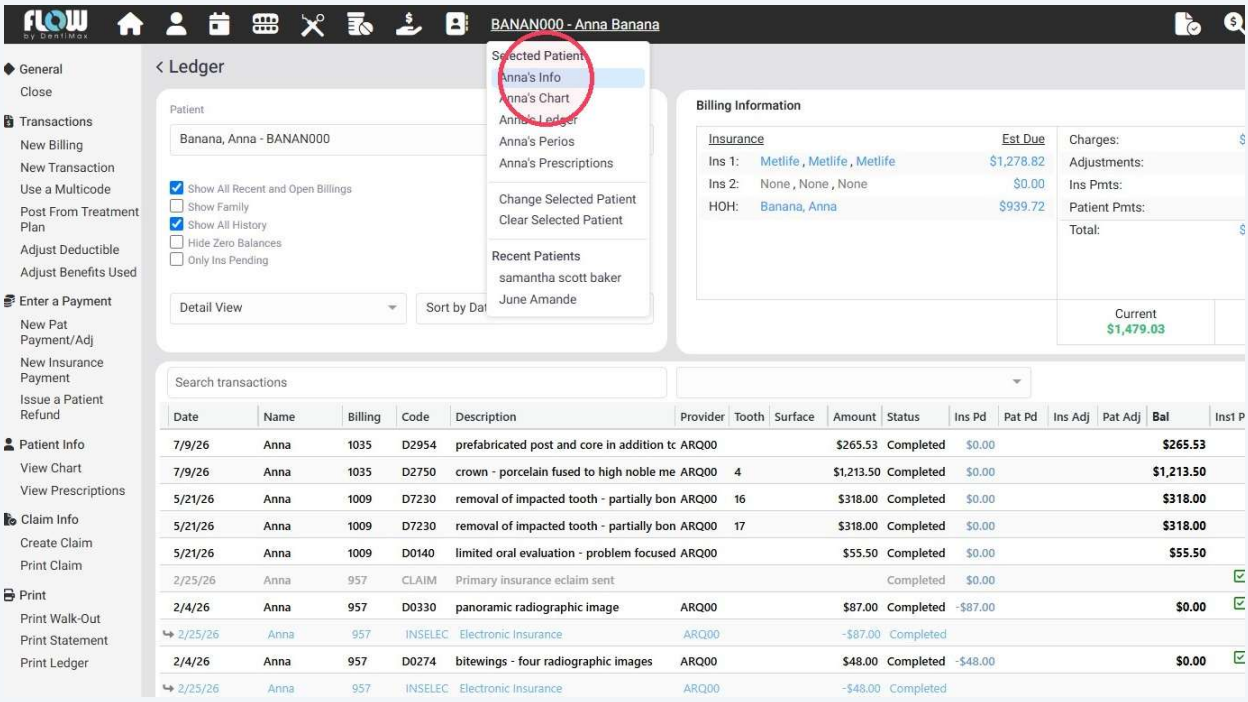
Learn how to update insurance subscriber details and generate accurate medical claims for patients. This guide walks you through the essential steps to manage billing records and finalize insurance documentation efficiently.

1 On the ledger, this patient has Metlife as the current insurance. All current procedures have been billed to Metlife.



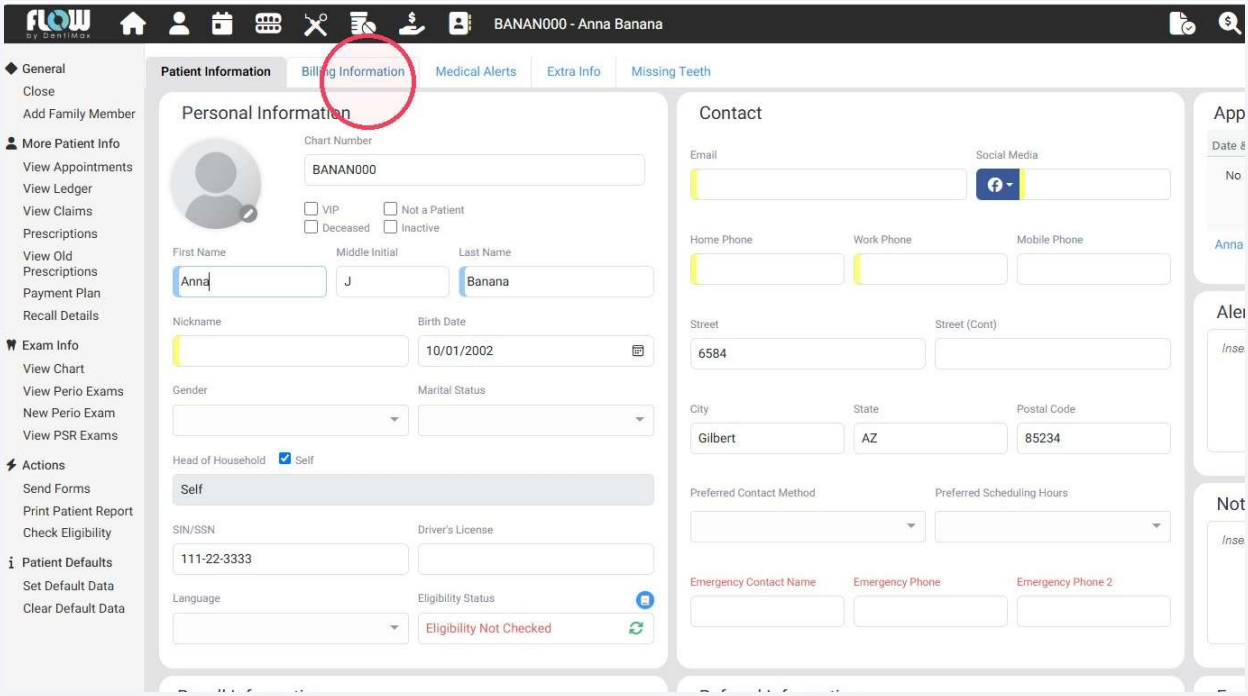
Update Patient Insurance

2 To UPDATE the insurance; go to patient info

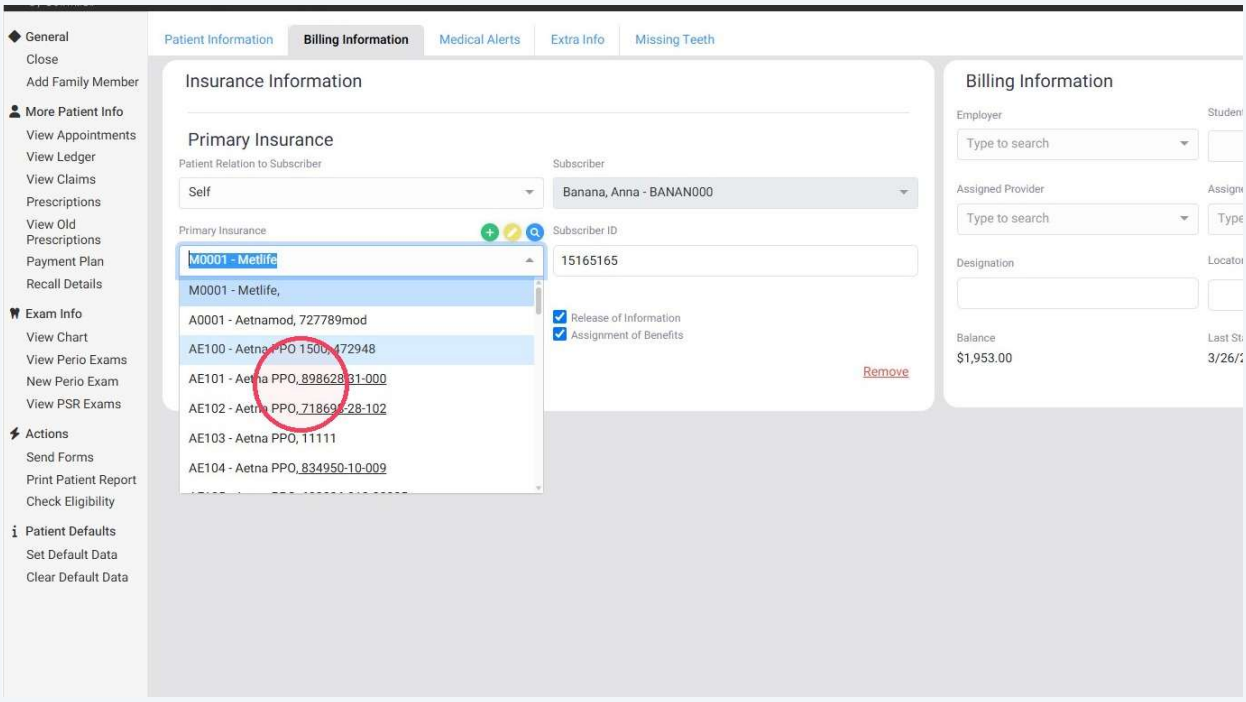


Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal
7/9/26	Anna	1035	D2954	prefabricated post and core in addition tc	ARQ00			$265.53	Completed	$0.00				$265.53
7/9/26	Anna	1035	D2750	crown - porcelain fused to high noble me	ARQ00	4		$1,213.50	Completed	$0.00				$1,213.50
5/21/26	Anna	1009	D7230	removal of impacted tooth - partially bon	ARQ00	16		$318.00	Completed	$0.00				$318.00
5/21/26	Anna	1009	D7230	removal of impacted tooth - partially bon	ARQ00	17		$318.00	Completed	$0.00				$318.00
5/21/26	Anna	1009	D0140	limited oral evaluation - problem focused	ARQ00			$55.50	Completed	$0.00				$55.50
2/25/26	Anna	957	CLAIM	Primary insurance eclaim sent					Completed	$0.00				
2/4/26	Anna	957	D0330	panoramic radiographic image	ARQ00			$87.00	Completed	-$87.00				$0.00
2/25/26	Anna	957	INSELEC	Electronic Insurance	ARQ00			-$87.00	Completed					
2/4/26	Anna	957	D0274	bitewings - four radiographic images	ARQ00			$48.00	Completed	-$48.00				$0.00
2/25/26	Anna	957	INSELEC	Electronic Insurance	ARQ00			-$48.00	Completed					

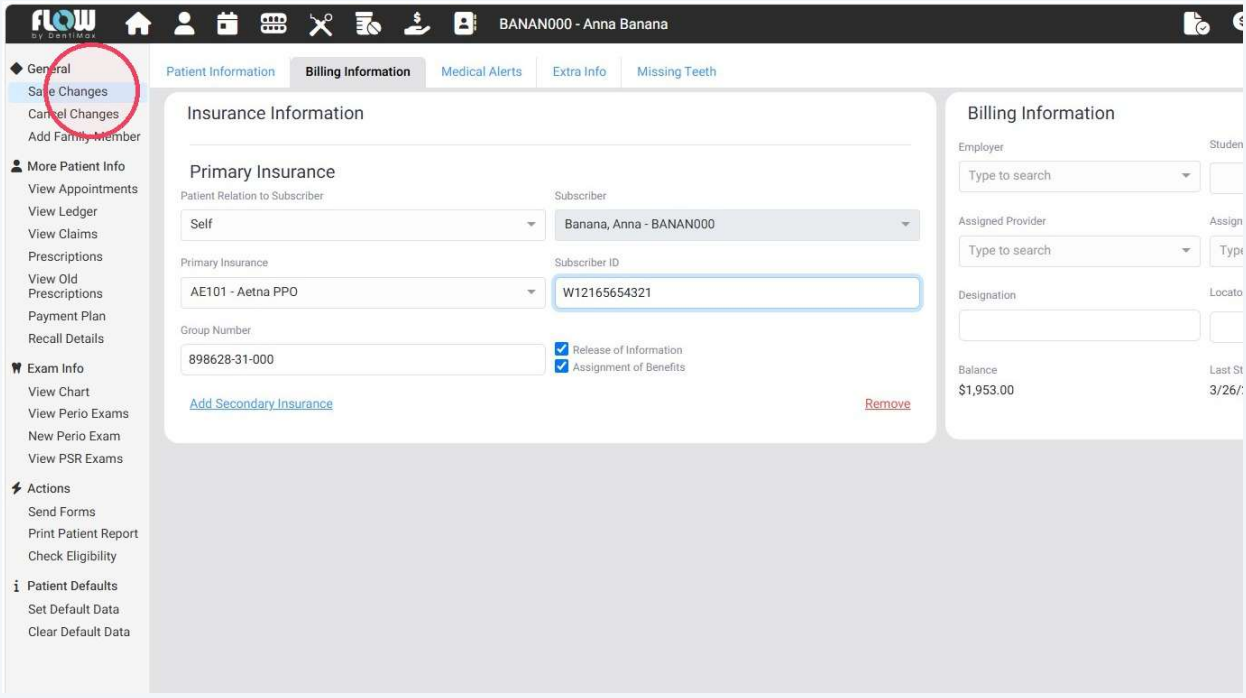
3 Click "Billing Information" tab



4 Select new insurance, and update ID#'s as needed

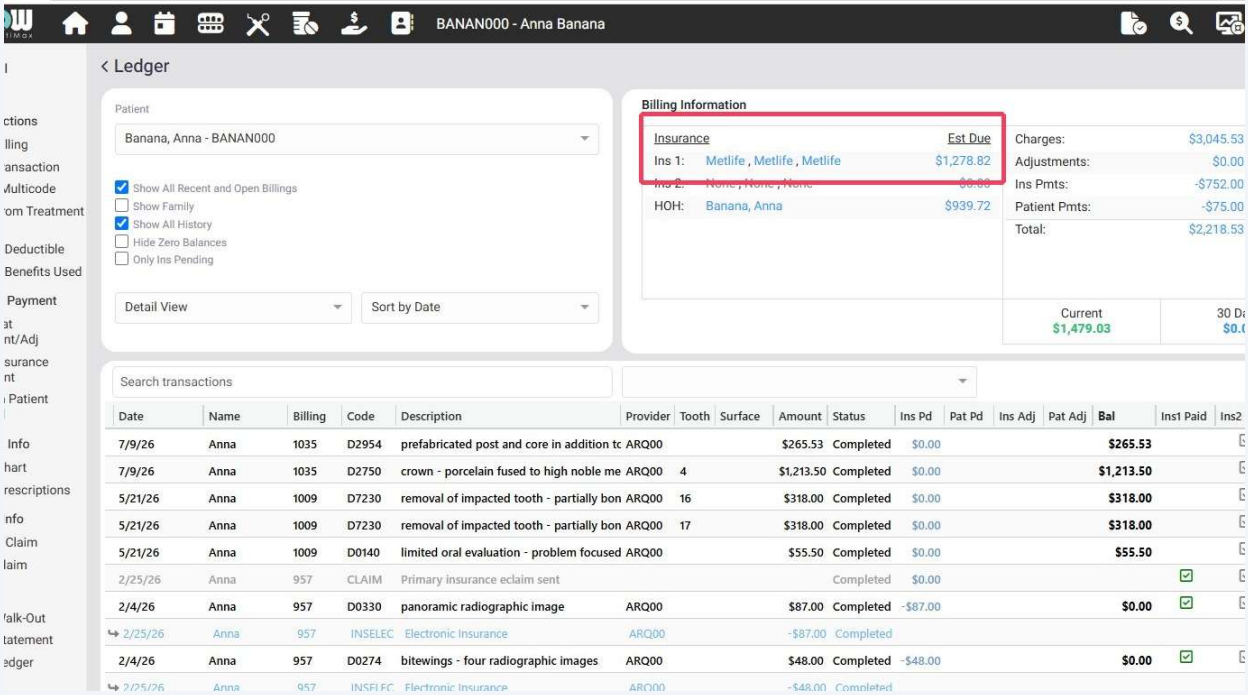


5 Click "Save Changes"

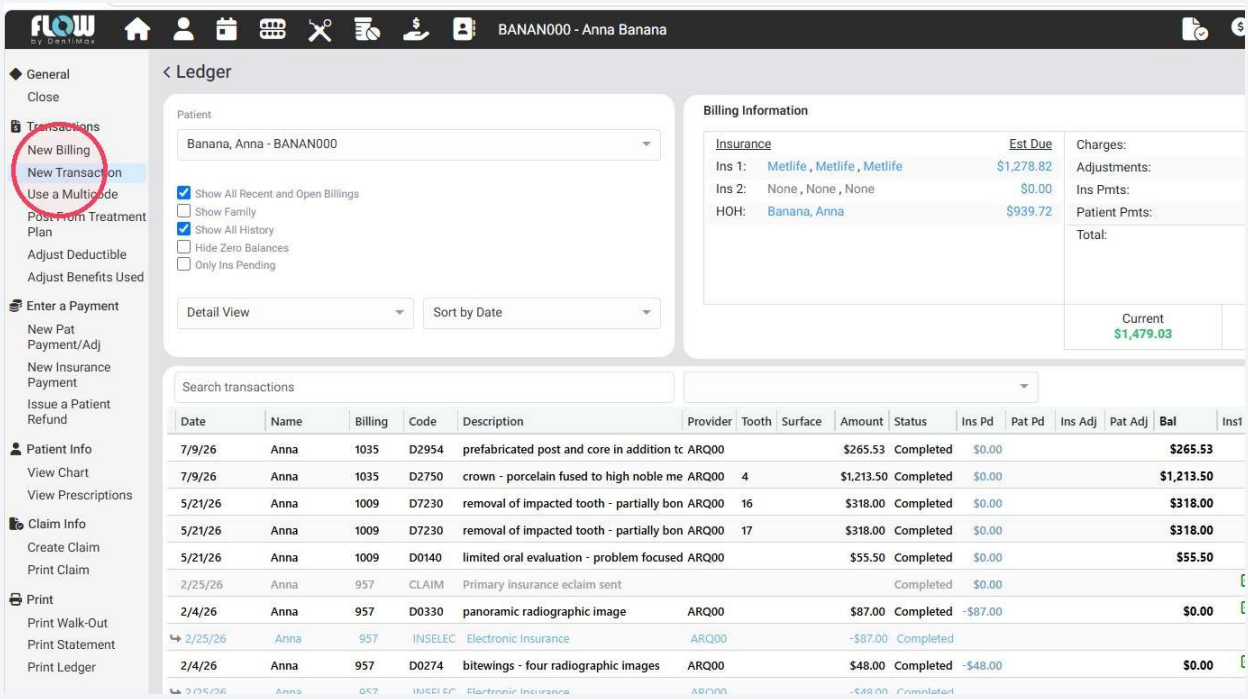


6 Looking at the ledger, you will see that Metlife is still listed as the insurance in the Billing Information.

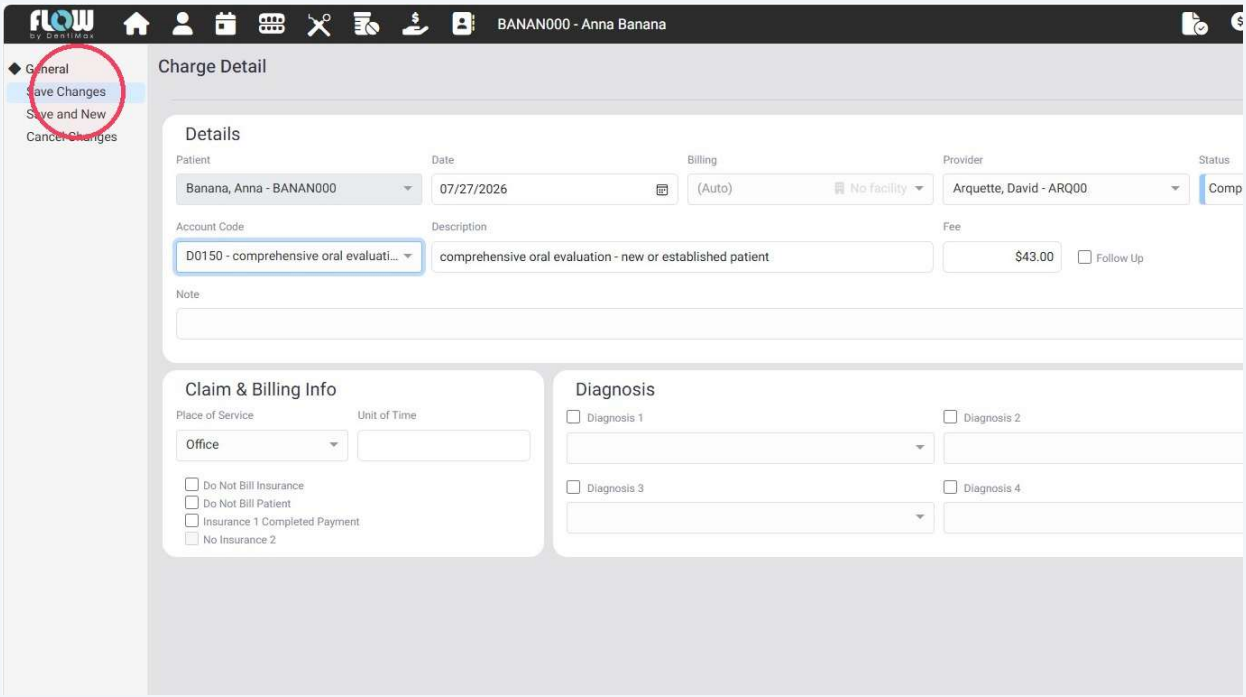
No CHARGES have been applied to the updated insurance yet.



7 When we add new charges to the patient's ledger, it will create a new billing using the updated insurance policy

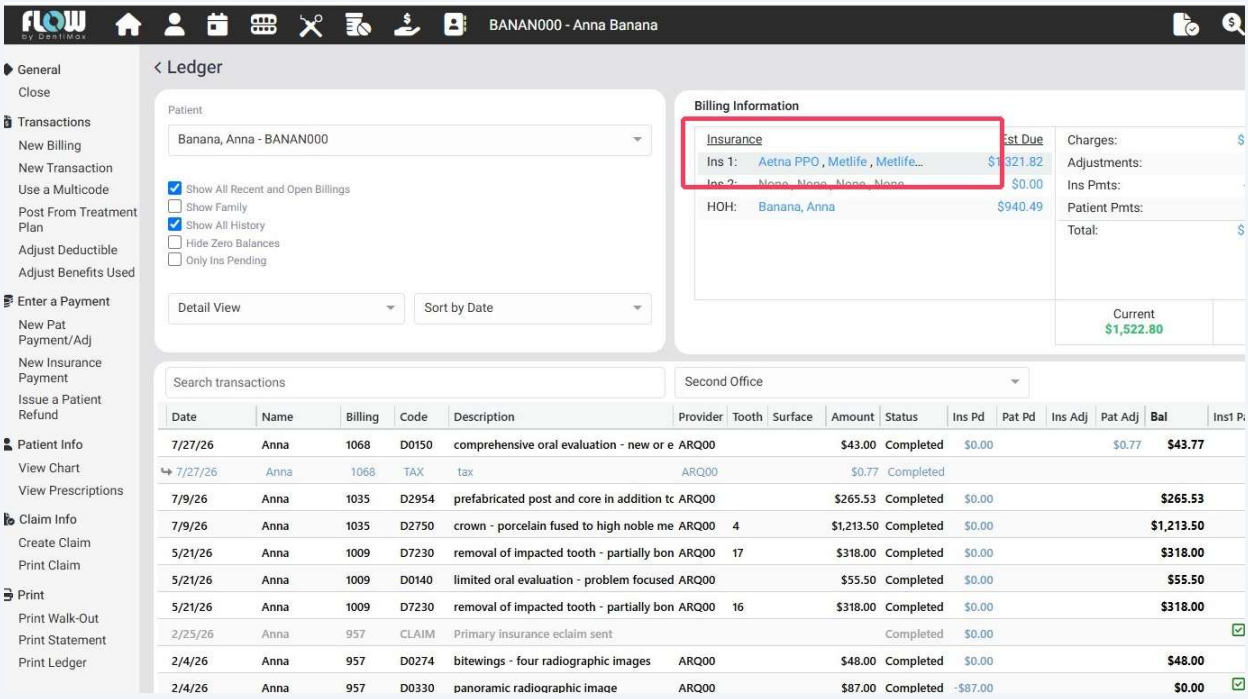


8 Click "Save Changes"



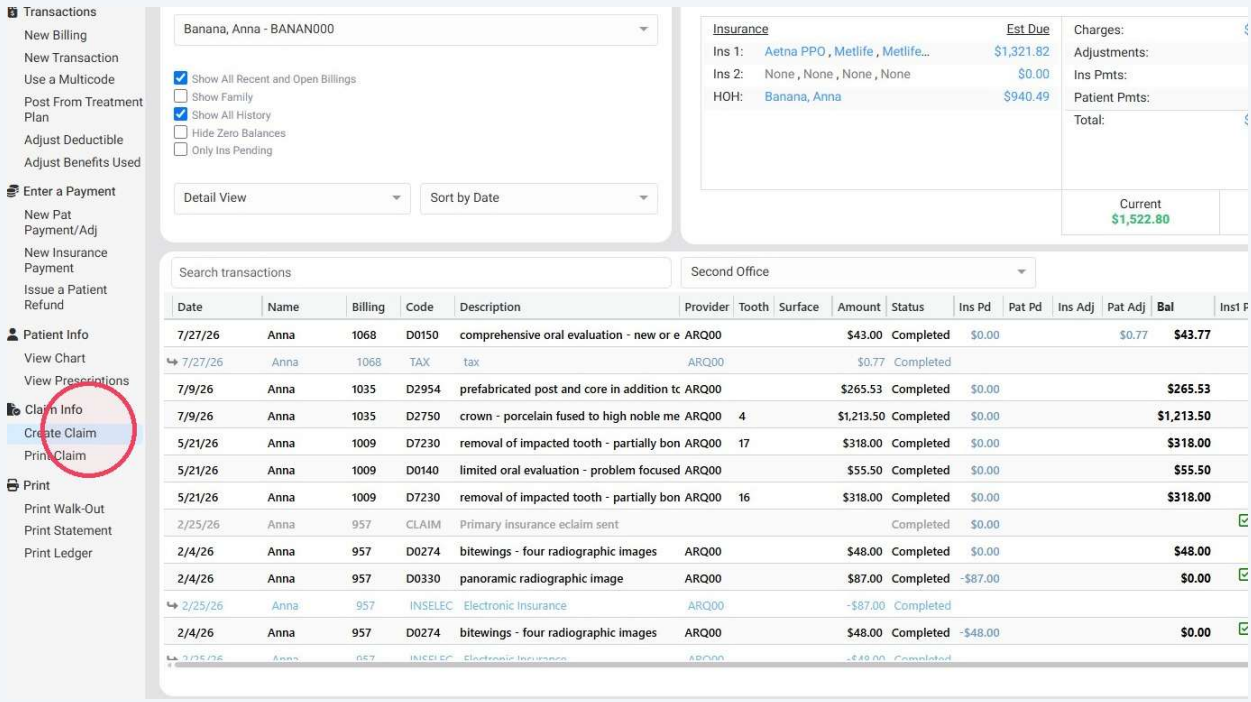
9 Now the Billing Information on the ledger will show the updated policy and the previous billed policy.

You are now ready to create a claim for the current charges to the updated insurance.

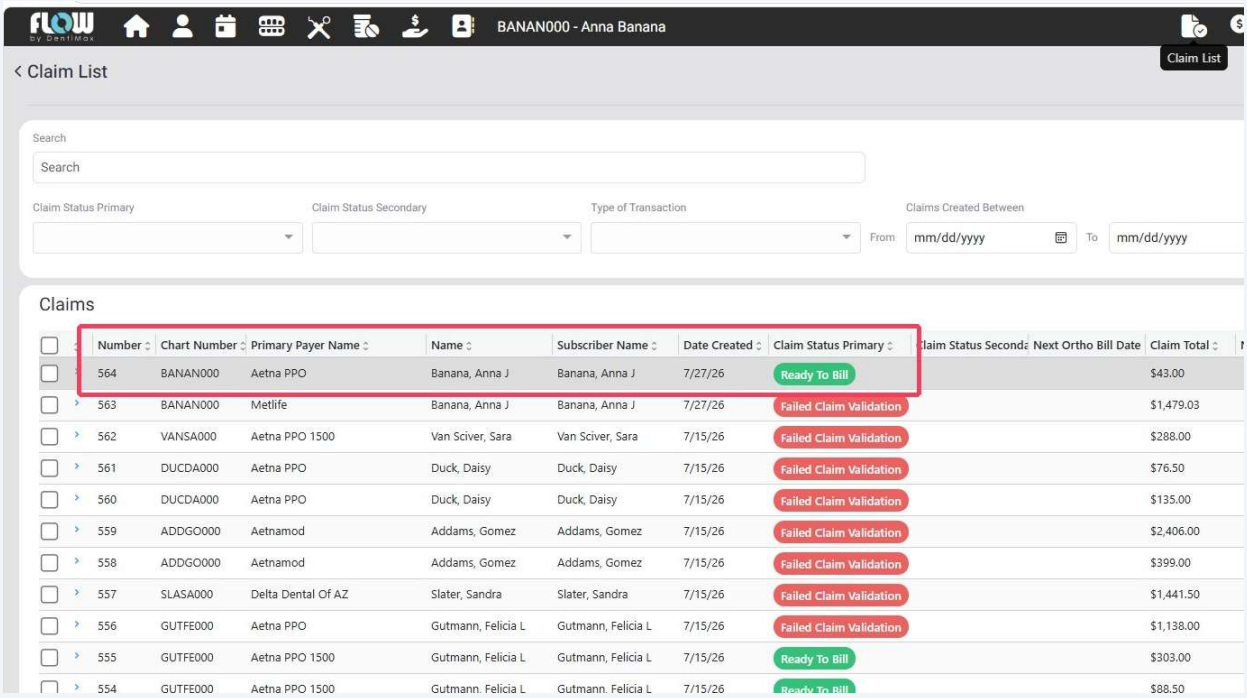


Create Claims

10 Click "Create Claim"

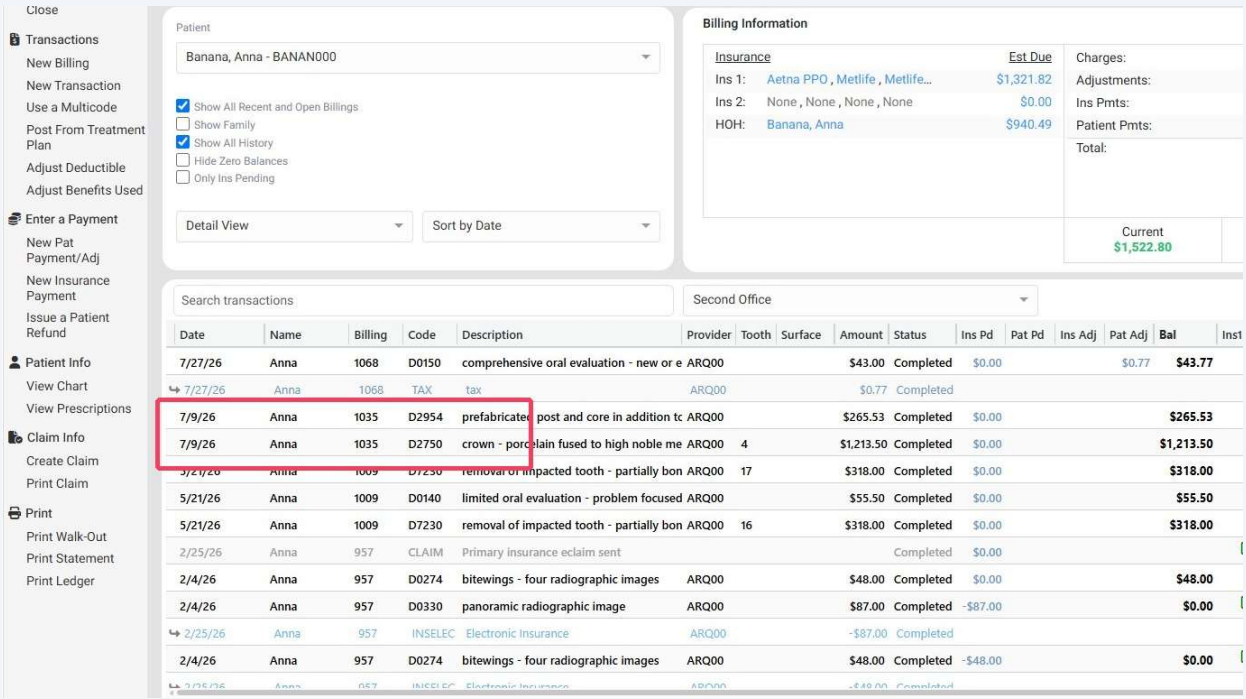


11 Claim has been created to the updated insurance policy.



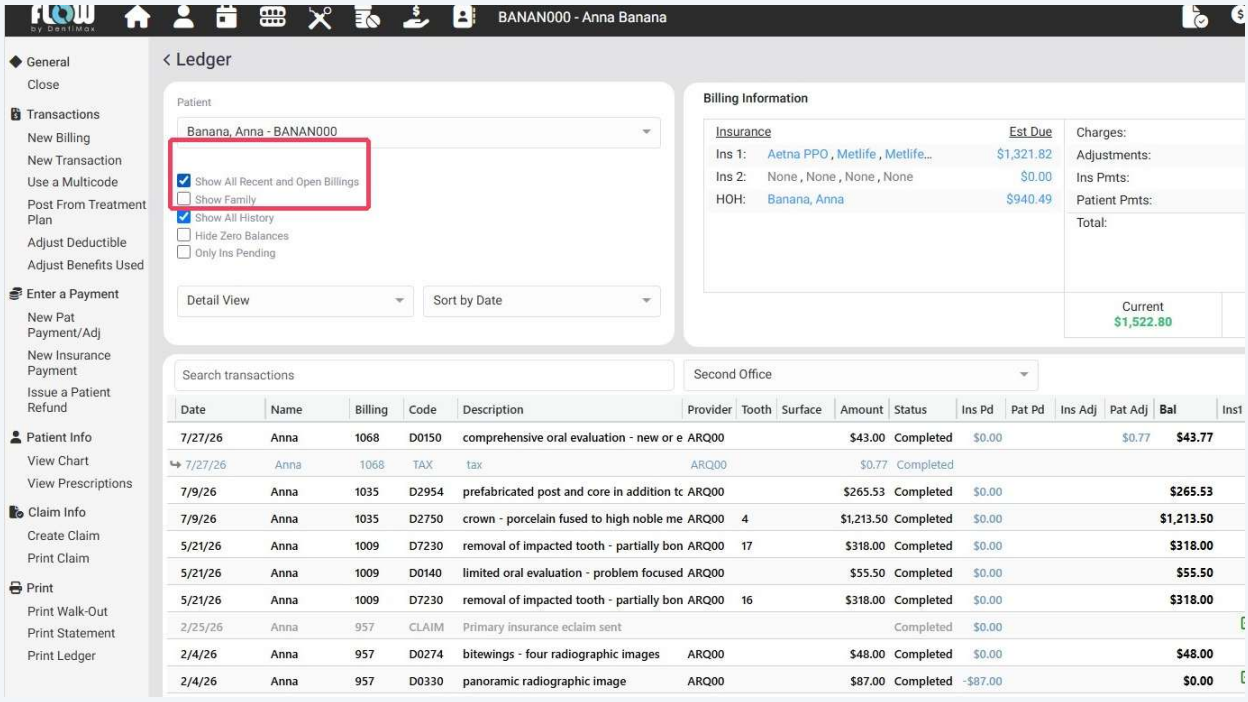
Number	Chart Number	Primary Payer Name	Name	Subscriber Name	Date Created	Claim Status Primary	Claim Status Secondary	Next Ortho Bill Date	Claim Total
564	BANAN000	Aetna PPO	Banana, Anna J	Banana, Anna J	7/27/26	Ready To Bill			$43.00
563	BANAN000	Metlife	Banana, Anna J	Banana, Anna J	7/27/26	Failed Claim Validation			$1,479.03
562	VANSA000	Aetna PPO 1500	Van Sciver, Sara	Van Sciver, Sara	7/15/26	Failed Claim Validation			$288.00
561	DUCDA000	Aetna PPO	Duck, Daisy	Duck, Daisy	7/15/26	Failed Claim Validation			$76.50
560	DUCDA000	Aetna PPO	Duck, Daisy	Duck, Daisy	7/15/26	Failed Claim Validation			$135.00
559	ADDGO000	Aetnamod	Addams, Gomez	Addams, Gomez	7/15/26	Failed Claim Validation			$2,406.00
558	ADDGO000	Aetnamod	Addams, Gomez	Addams, Gomez	7/15/26	Failed Claim Validation			$399.00
557	SLASA000	Delta Dental Of AZ	Slater, Sandra	Slater, Sandra	7/15/26	Failed Claim Validation			$1,441.50
556	GUTFE000	Aetna PPO	Gutmann, Felicia L	Gutmann, Felicia L	7/15/26	Failed Claim Validation			$1,138.00
555	GUTFE000	Aetna PPO 1500	Gutmann, Felicia L	Gutmann, Felicia L	7/15/26	Ready To Bill			$303.00
554	GUTFE000	Aetna PPO 1500	Gutmann, Felicia L	Gutmann, Felicia L	7/15/26	Ready To Bill			$88.50

12 IF you need to updated previous charges to the NEW INSURANCE:
In this example, charges for DOS 7/9/26 on BILLING #1035, were previously billed out to Metlife.

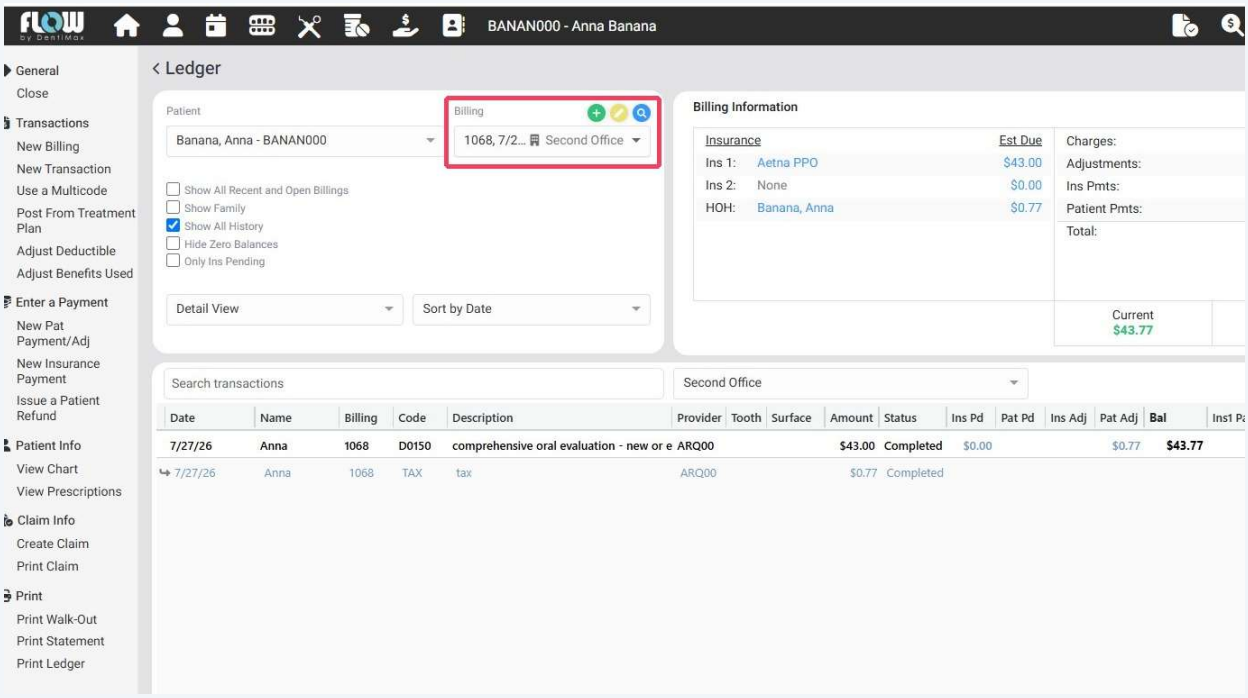


Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal
7/27/26	Anna	1068	D0150	comprehensive oral evaluation - new or e	ARQ00			$43.00	Completed	$0.00			$0.77	$43.77
7/27/26	Anna	1068	TAX	tax	ARQ00			$0.77	Completed					
7/9/26	Anna	1035	D2954	prefabricate post and core in addition tc	ARQ00			$265.53	Completed	$0.00				$265.53
7/9/26	Anna	1035	D2750	crown - porcelain fused to high noble me	ARQ00	4		$1,213.50	Completed	$0.00				$1,213.50
5/21/26	Anna	1009	D7230	removal of impacted tooth - partially bon	ARQ00	17		$318.00	Completed	$0.00				$318.00
5/21/26	Anna	1009	D0140	limited oral evaluation - problem focused	ARQ00			$55.50	Completed	$0.00				$55.50
5/21/26	Anna	1009	D7230	removal of impacted tooth - partially bon	ARQ00	16		$318.00	Completed	$0.00				$318.00
2/25/26	Anna	957	CLAIM	Primary insurance eclaim sent					Completed	$0.00				
2/4/26	Anna	957	D0274	bitewings - four radiographic images	ARQ00			$48.00	Completed	$0.00				$48.00
2/4/26	Anna	957	D0330	panoramic radiographic image	ARQ00			$87.00	Completed	-$87.00				$0.00
2/25/26	Anna	957	INSELEC	Electronic Insurance	ARQ00			-$87.00	Completed					
2/4/26	Anna	957	D0274	bitewings - four radiographic images	ARQ00			$48.00	Completed	-$48.00				$0.00

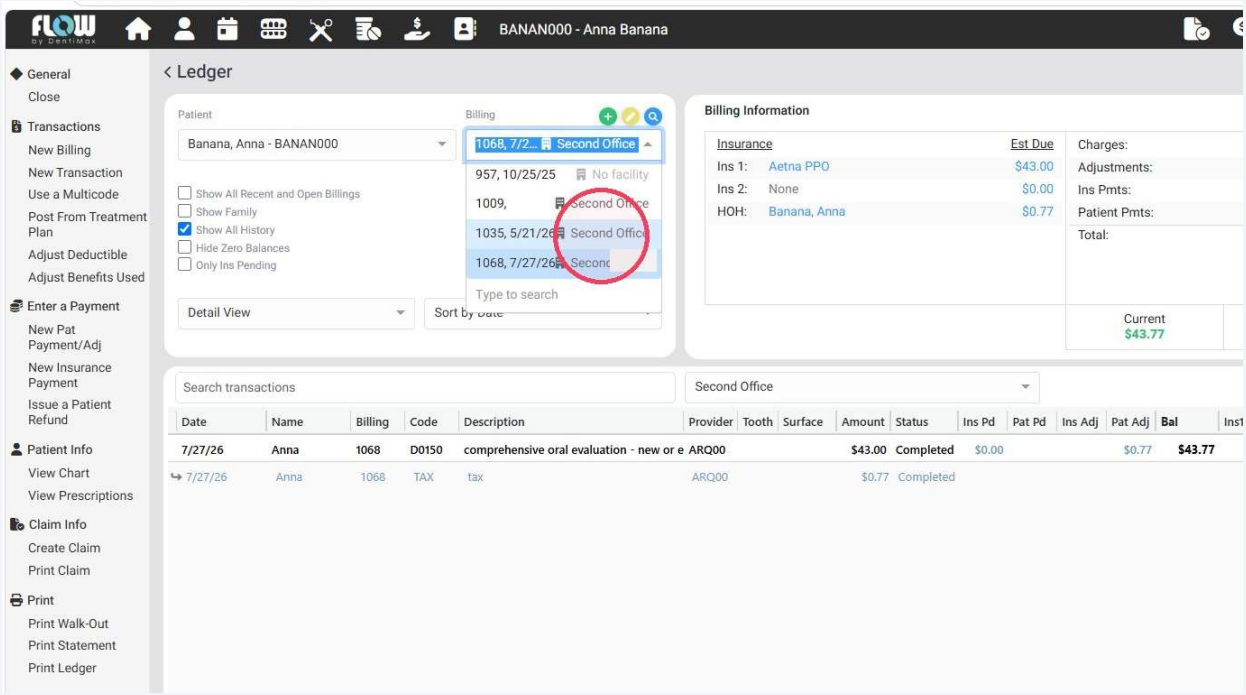
13 To update a specific BILLING NUMBER:
UNCHECK the box "Show All Recent and Open Billings"



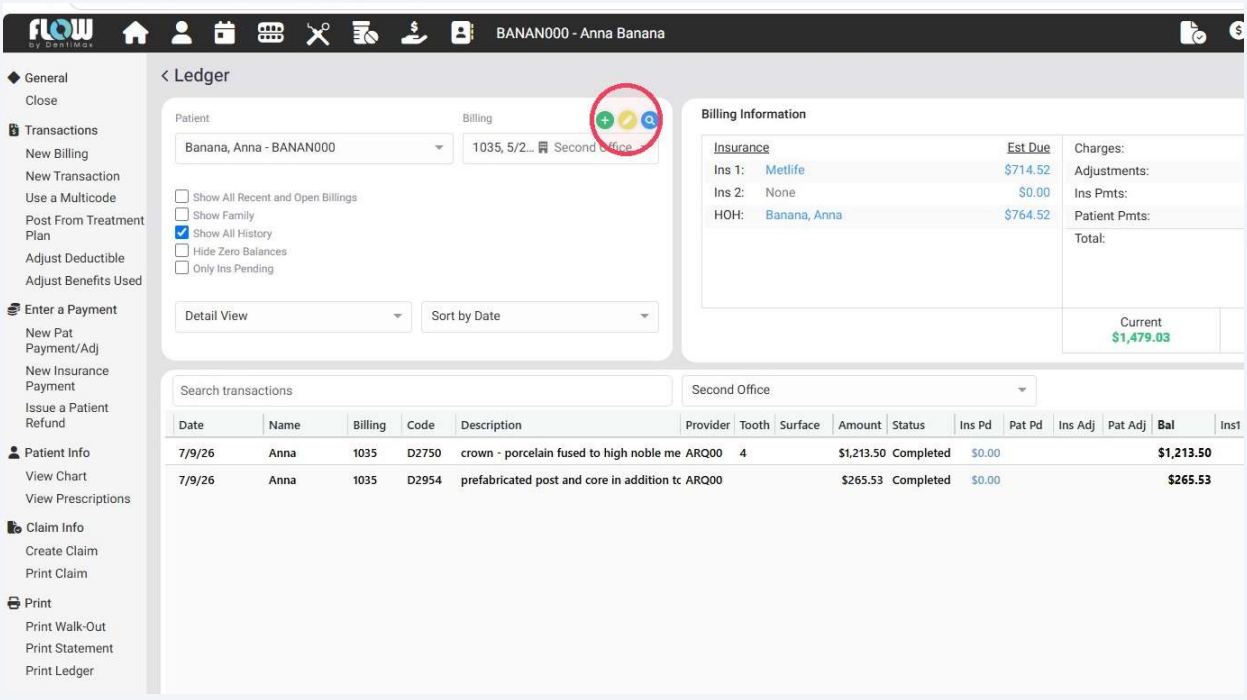
14 You will now have the option to view all Billings



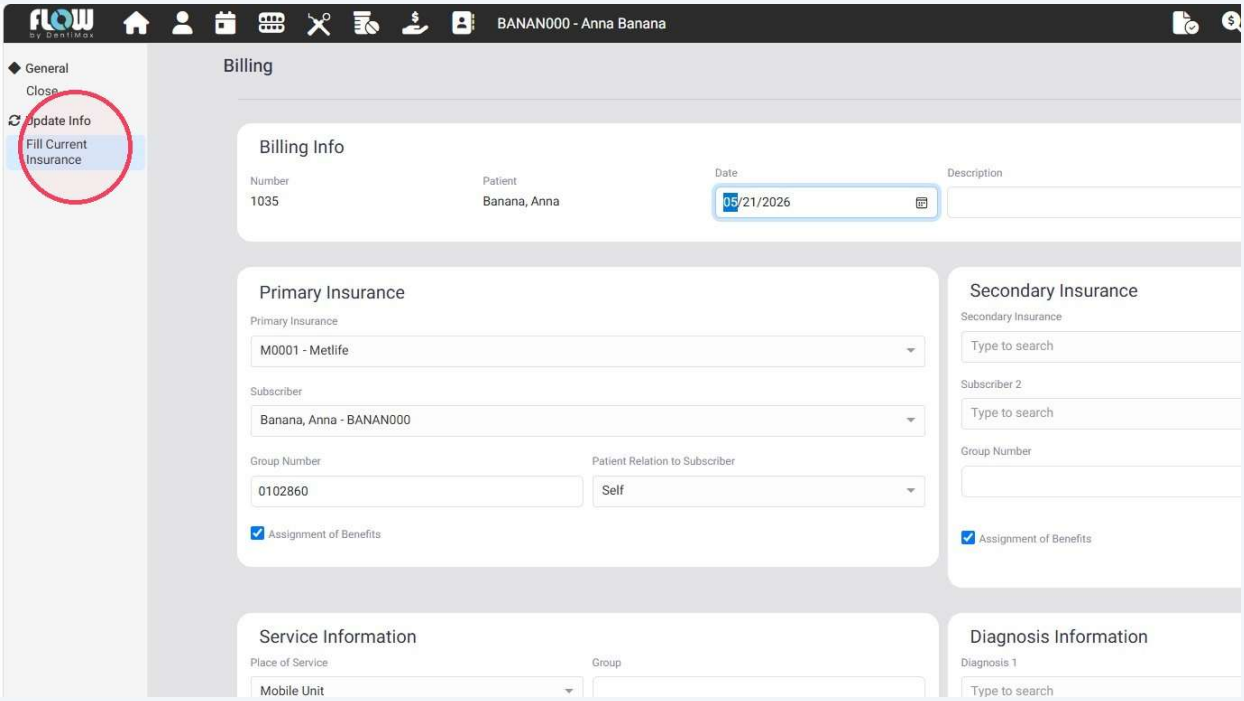
15 From the "Billing" section, use the drop-down menu to select the "Billing" you would like to update



16 Once you have your "Billing" selected, you will need to click on the "Yellow" Edit button



17 You will see that the Primary Insurance on the "Billing" is listed at the previous insurance policy.
On the left menu, you can select "Fill Current Insurance", this will update this specific "Billing" to the current insurance listed in the patient inforamtion screen.

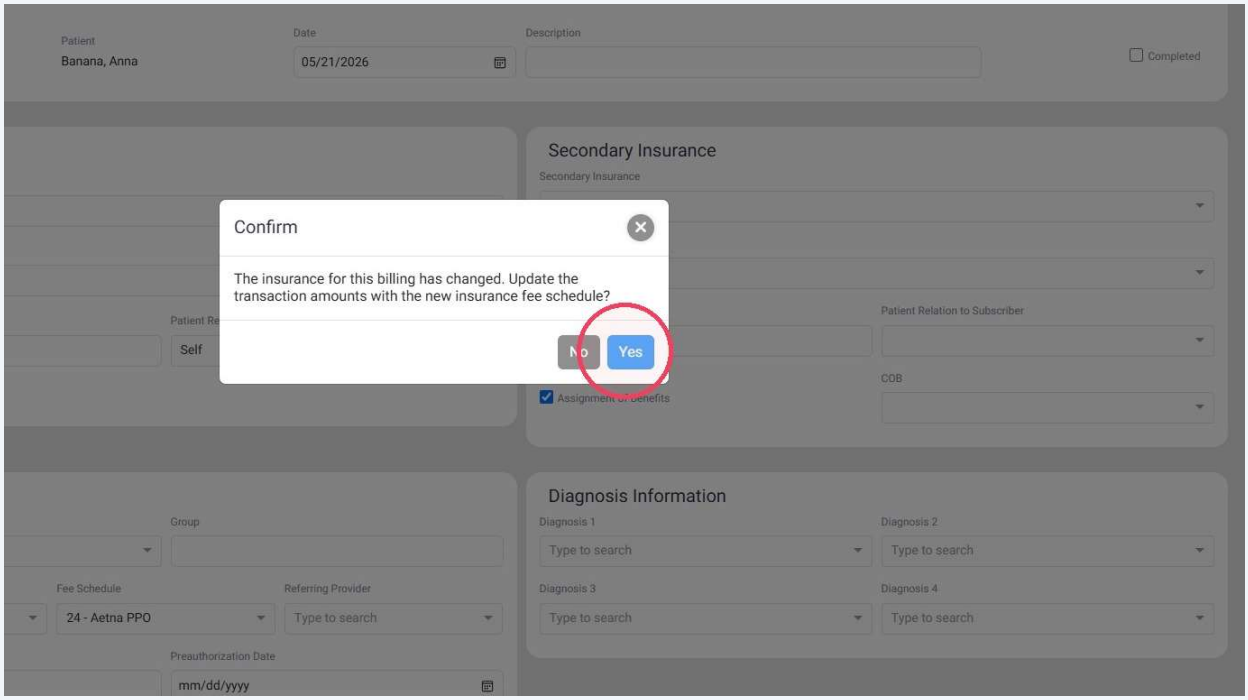


18 This is going to ask you two questions: The first answer will depend on the policies you are changing and how your office has the insurance fee schedules set up.

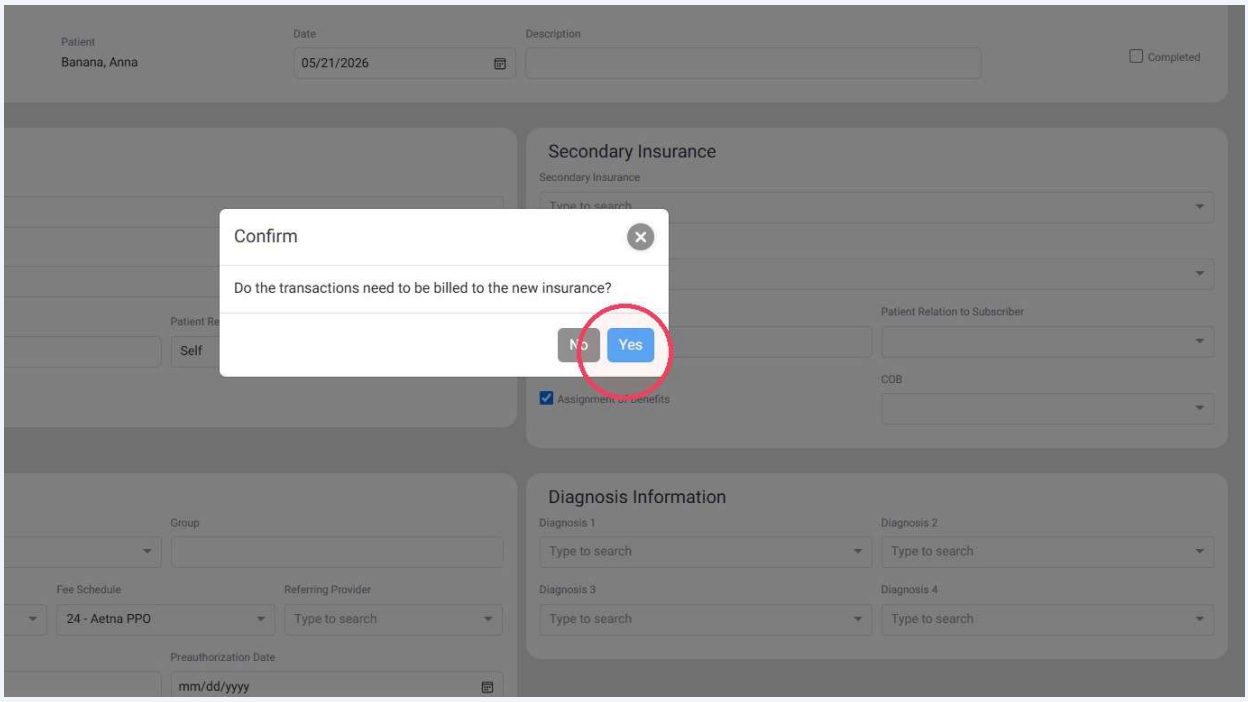
This is asking if you would like to update the charges on this specific Billing to be updated to reflect the fees associated to the NEW INSURANCE FEE SCHEDULE.

In this example: the original charges were on the ledger at the Metlife FEE SCHEDULE fees; IF I select YES, the fees on the ledger for these charges will update to the AETNA FEE SCHEDULE fees. IF I select NO, the charges on the ledger will stay at the Metlife fees.

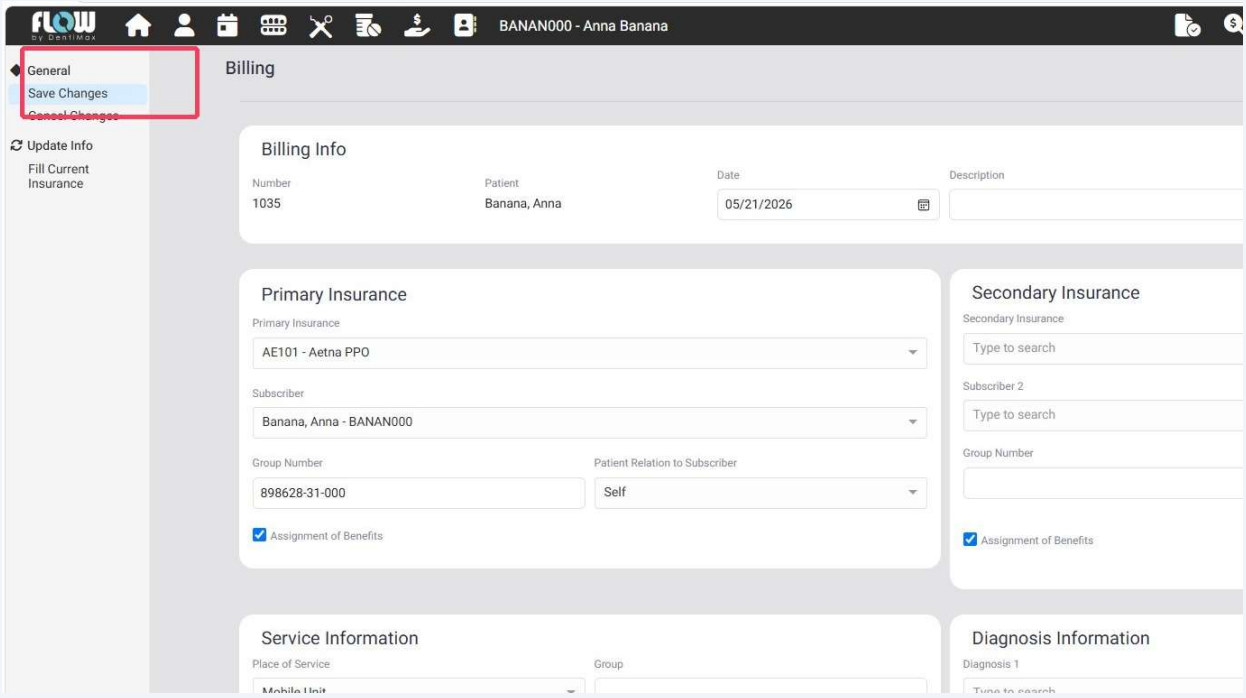
If you office is set up with all insurance policies to post at UCR fee, then this will not change the charges on the ledger.



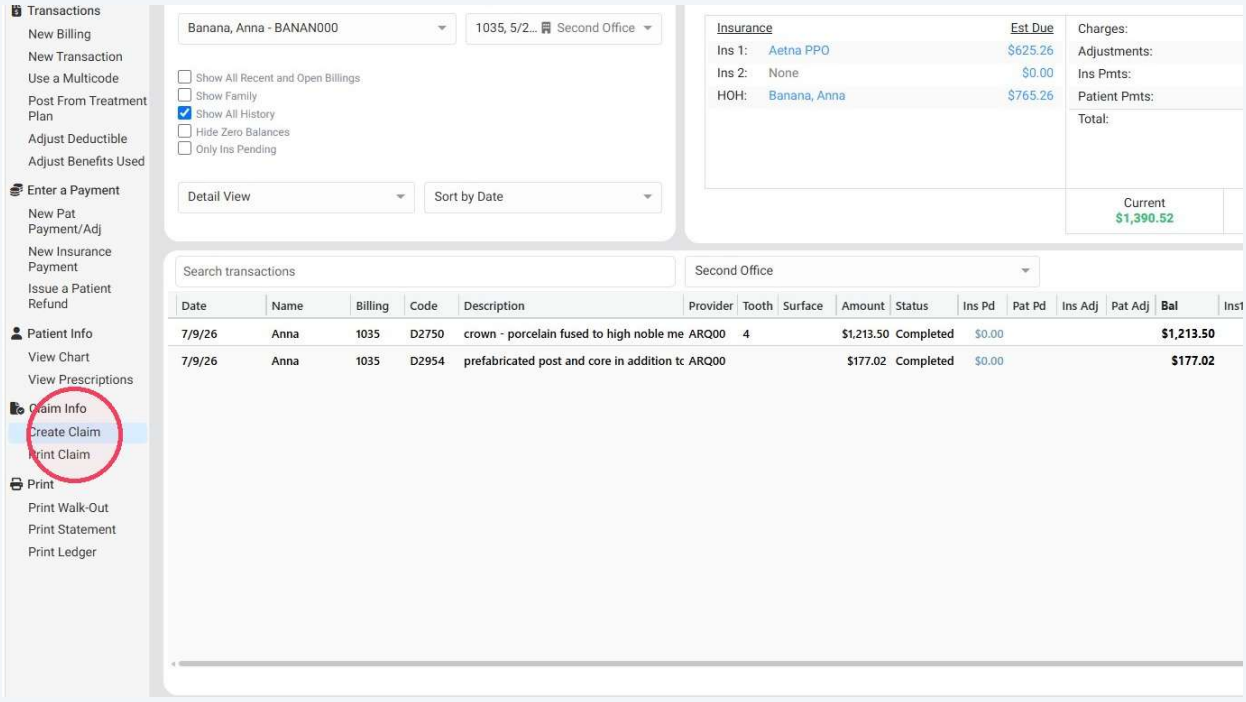
19 The second question: In most cases you will answer YES, this will allow you to now CREATE a claims for this billing.



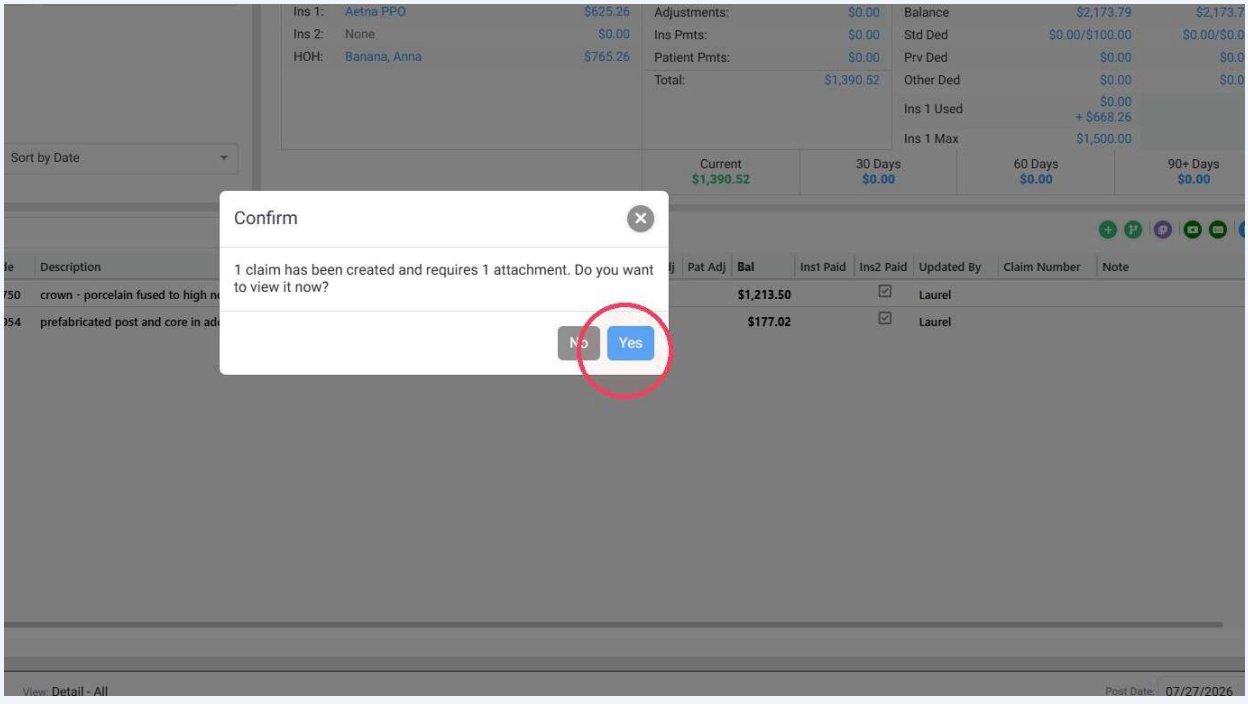
20 Click "Save Changes"



21 Now on the ledger you can click "Create Claim" for this Billing

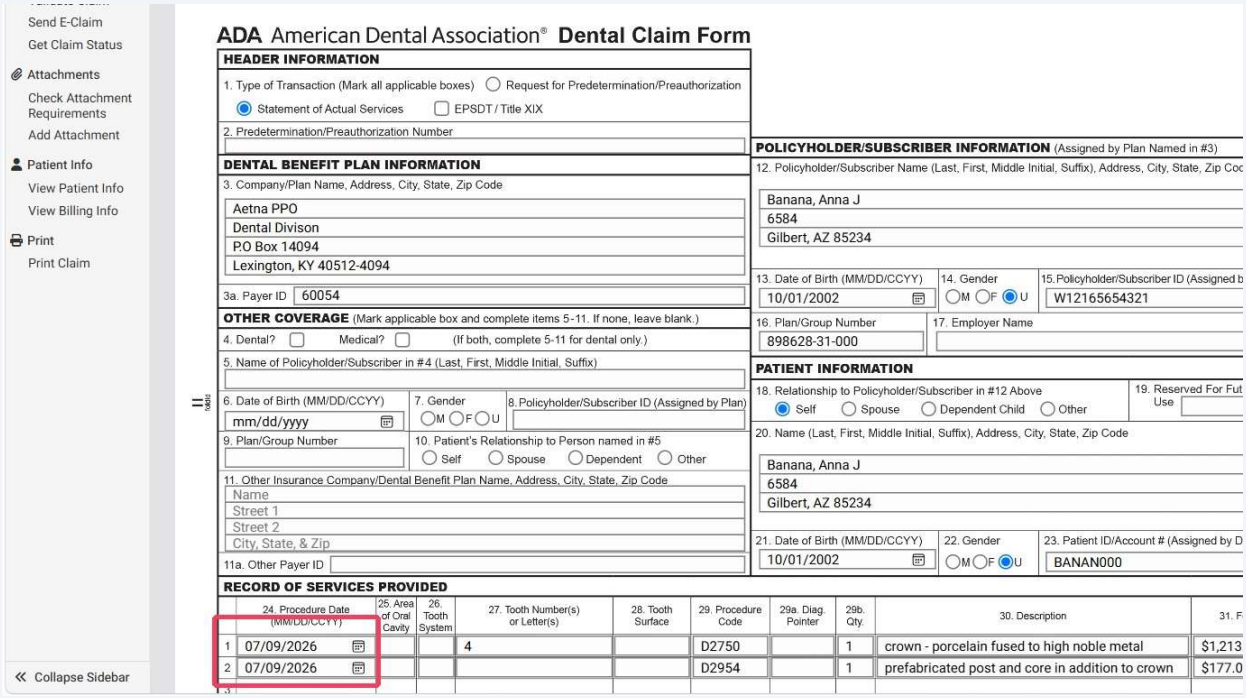


22 If you would like to view the claim, click Yes
If you click NO, the claim will be created and can be found in your claims list when you are ready to proceed with the processing.



23 You can now see the claim for DOS 7/9/2026 has been billed to the UPDATED INSURANCE, Aetna

You can process the claim in your usual manner



24 If you want the ledger to show all billings; Check the box "Show All Recent and Open Billings".