

How to Manage Patient Billing and Insurance Claims



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.

Billing Information

Insurance	Est Due	Charges:	Primary
Ins 1: Metlife, Metlife, Metlife	\$1,278.82	\$3,045.53	Balance
Ins 2: Metlife, Metlife, Metlife	\$0.00	\$0.00	Std Ded
HOH: Banana, Anna	\$939.72	-\$752.00	Prv Ded
		-\$75.00	Other Ded
		\$2,218.53	Ins 1 Used
			Ins 1 Max
		Current \$1,479.03	30 Days \$0.00

Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1 Paid	Ins2 Paid	Updated
7/9/26	Anna	1035	D2954	prefabricated post and core in addition to	ARQ00			\$265.53	Completed	\$0.00				\$265.53			Laurel
7/9/26	Anna	1035	D2750	crown - porcelain fused to high noble me	ARQ00	4		\$1,213.50	Completed	\$0.00				\$1,213.50			Laurel
5/21/26	Anna	1009	D7230	removal of impacted tooth - partially bon	ARQ00	16		\$318.00	Completed	\$0.00				\$318.00			tiffanye
5/21/26	Anna	1009	D7230	removal of impacted tooth - partially bon	ARQ00	17		\$318.00	Completed	\$0.00				\$318.00			tiffanye
5/21/26	Anna	1009	D0140	limited oral evaluation - problem focused	ARQ00			\$55.50	Completed	\$0.00				\$55.50			tiffanye
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			Brad
2/25/26	Anna	957	INSELEC	Electronic Insurance	ARQ00			-\$87.00	Completed								Brad
2/4/26	Anna	957	D0274	bitewings - four radiographic images	ARQ00			\$48.00	Completed	-\$48.00				\$0.00			Brad
2/25/26	Anna	957	INSELEC	Electronic Insurance	ARQ00			-\$48.00	Completed								Brad

Update Patient Insurance

2 To UPDATE the insurance; go to patient info

Selected Patient

- Anna's Info
- Anna's Chart
- Anna's Ledger
- Anna's Perios
- Anna's Prescriptions
- Change Selected Patient
- Clear Selected Patient
- Recent Patients
- samantha scott baker
- June Amande

Billing Information

Insurance	Est Due	Charges:
Ins 1: Metlife, Metlife, Metlife	\$1,278.82	Adjustments:
Ins 2: None, None, None	\$0.00	Ins Pmts:
HOH: Banana, Anna	\$939.72	Patient Pmts:
		Total:
		Current \$1,479.03

Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Inst P
7/9/26	Anna	1035	D2954	prefabricated post and core in addition to	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

Billing Information

Personal Information

Chart Number: BANAN000

First Name: Anna, Middle Initial: J, Last Name: Banana

Birth Date: 10/01/2002

Gender: [Dropdown], Marital Status: [Dropdown]

Head of Household: ☒ Self

SIN/SSN: 111-22-3333, Driver's License: [Field]

Language: [Dropdown], Eligibility Status: Eligibility Not Checked

Contact

Email: [Field], Social Media: [Field]

Home Phone: [Field], Work Phone: [Field], Mobile Phone: [Field]

Street: 6584, Street (Cont): [Field]

City: Gilbert, State: AZ, Postal Code: 85234

Preferred Contact Method: [Dropdown], Preferred Scheduling Hours: [Dropdown]

Emergency Contact Name: [Field], Emergency Phone: [Field], Emergency Phone 2: [Field]

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

Insurance Information

Primary Insurance

Patient Relation to Subscriber: Self

Subscriber: Banana, Anna - BANAN000

Primary Insurance: M0001 - Metlife, A0001 - Aetnamod, 727789mod, AE100 - Aetna PPO, 1500-472948, AE101 - Aetna PPO, 898628-31-000, AE102 - Aetna PPO, 71869-28-102, AE103 - Aetna PPO, 11111, AE104 - Aetna PPO, 834950-10-009

Subscriber ID: 15165165

☒ Release of Information
☒ Assignment of Benefits

[Remove](#)

Billing Information

Employer: Type to search

Assigned Provider: Type to search

Designation:

Balance: \$1,953.00

5 Click "Save Changes"

Insurance Information

Primary Insurance

Patient Relation to Subscriber: Self

Subscriber: Banana, Anna - BANAN000

Primary Insurance: AE101 - Aetna PPO

Subscriber ID: W12165654321

Group Number: 898628-31-000

☒ Release of Information
☒ Assignment of Benefits

[Add Secondary Insurance](#)

[Remove](#)

Billing Information

Employer: Type to search

Assigned Provider: Type to search

Designation:

Balance: \$1,953.00

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.

Billing Information

Insurance	Est Due
Ins 1: Metlife, Metlife, Metlife	\$1,278.82
Ins 2: None, None, None	\$0.00
HOH: Banana, Anna	\$939.72

Charges: \$3,045.53
Adjustments: \$0.00
Ins Pmts: -\$752.00
Patient Pmts: -\$75.00
Total: \$2,218.53

Current: \$1,479.03

Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1 Paid	Ins2
7/9/26	Anna	1035	D2954	prefabricated post and core in addition to	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							

7

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

Billing Information

Insurance	Est Due
Ins 1: Metlife, Metlife, Metlife	\$1,278.82
Ins 2: None, None, None	\$0.00
HOH: Banana, Anna	\$939.72

Charges: \$3,045.53
Adjustments: \$0.00
Ins Pmts: -\$752.00
Patient Pmts: -\$75.00
Total: \$2,218.53

Current: \$1,479.03

Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1 Paid	Ins2
7/9/26	Anna	1035	D2954	prefabricated post and core in addition to	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							

8 Click "Save Changes"

Charge Detail

Details

Patient: Banana, Anna - BANAN000 | Date: 07/27/2026 | Billing: (Auto) | Provider: Arquette, David - ARQ00 | Status: Comp

Account Code: D0150 - comprehensive oral evaluati... | Description: comprehensive oral evaluation - new or established patient | Fee: \$43.00 | Follow Up: ☐

Note:

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

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.

Ledger

Patient: Banana, Anna - BANAN000

Billing Information

Insurance: Ins 1: Aetna PPO, Metlife, Metlife... | Est Due: \$1,321.82 | Ins 2: None, None, None, None | \$0.00 | HOH: Banana, Anna | \$940.49

Charges: \$ | Adjustments: | Ins Pmts: | Patient Pmts: | Total: | Current: \$1,522.80

Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1 P
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	prefabricated post and core in addition to	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	☒

Create Claims

10 Click "Create Claim"

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

Banana, Anna - BANAN000

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

Detail View

Sort by Date

Insurance

Ins 1: Aetna PPO , Metlife , Metlife...

Est Due

\$1,321.82

Ins 2: None , None , None , None

\$0.00

HOH: Banana, Anna

\$940.49

Charges:

Adjustments:

Ins Pmts:

Patient Pmts:

Total:

Current
\$1,522.80

Search transactions

Second Office

Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Inst P
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	prefabricated post and core in addition to	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	
2/25/26	Anna	957	INSELEC	Electronic Insurance	ARQ00			-\$48.00	Completed						

11 Claim has been created to the updated insurance policy.

flow by DentIMob

BANAN000 - Anna Banana

Claim List

Search

Claim Status Primary: Claim Status Secondary: Type of Transaction: Claims Created Between: From To

Claims

	Number	Chart Number	Primary Payer Name	Name	Subscriber Name	Date Created	Claim Status Primary	Claim Status Second	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	DUCA000	Aetna PPO	Duck, Daisy	Duck, Daisy	7/15/26	Failed Claim Validation			\$76.50
☐	560	DUCA000	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.

Close

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

Banana, Anna - BANAN000

☒ 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, Metlife, Metlife...	\$1,321.82	Adjustments:
Ins 2: None, None, None, None	\$0.00	Ins Pmts:
HOH: Banana, Anna	\$940.49	Patient Pmts:
		Total:
		Current
		\$1,522.80

Search transactions

Second Office

Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Inst
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	prefabricated post and core in addition to	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	
7/27/26	Anna	1009	D7250	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	
2/25/26	Anna	957	INSELEC	Electronic Insurance	ARQ00			\$-48.00	Completed						

13

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

General
Close

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

Ledger
Patient: Banana, Anna - BANAN000
☒ 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, Metlife, Metlife...	\$1,321.82	Adjustments:
Ins 2: None, None, None, None	\$0.00	Ins Pmts:
HOH: Banana, Anna	\$940.49	Patient Pmts:
		Total:
		Current \$1,522.80

Search transactions Second Office

Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1
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	prefabricated post and core in addition to	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	

14

You will now have the option to view all Billings

General
Close

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

Ledger
Patient: Banana, Anna - BANAN000
 Billing: 1068, 7/2... Second Office
☐ 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	\$43.00	Adjustments:
Ins 2: None	\$0.00	Ins Pmts:
HOH: Banana, Anna	\$0.77	Patient Pmts:
		Total:
		Current \$43.77

Search transactions Second Office

Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1
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						

15

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

Flow by Dentimax

BANAN000 - Anna Banana

< Ledger

Patient: Banana, Anna - BANAN000

Billing: 1068, 7/27/26 Second Office

☐ 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	\$43.00	Adjustments:
Ins 2: None	\$0.00	Ins Pmts:
HOH: Banana, Anna	\$0.77	Patient Pmts:
		Total:
		Current \$43.77

Search transactions: Second Office

Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1
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						

16

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

Flow by Dentimax

BANAN000 - Anna Banana

< Ledger

Patient: Banana, Anna - BANAN000

Billing: 1035, 5/2/26 Second Office

☐ 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: Metlife	\$714.52	Adjustments:
Ins 2: None	\$0.00	Ins Pmts:
HOH: Banana, Anna	\$764.52	Patient Pmts:
		Total:
		Current \$1,479.03

Search transactions: Second Office

Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1
7/9/26	Anna	1035	D2750	crown - porcelain fused to high noble me	ARQ00	4		\$1,213.50	Completed	\$0.00				\$1,213.50	
7/9/26	Anna	1035	D2954	prefabricated post and core in addition to	ARQ00			\$265.53	Completed	\$0.00				\$265.53	

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 information screen.

The screenshot shows the FLOW by Dentimax software interface. The top navigation bar includes icons for home, user, calendar, grid, scissors, list, person, and document, along with the patient name "BANAN000 - Anna Banana". The left sidebar menu has "General" selected, with "Update Info" and "Fill Current Insurance" visible. "Fill Current Insurance" is circled in red. The main content area is titled "Billing" and contains several form sections:

- Billing Info:** Includes fields for Number (1035), Patient (Banana, Anna), Date (05/21/2026), and Description.
- Primary Insurance:** Includes fields for Primary Insurance (M0001 - Metlife), Subscriber (Banana, Anna - BANAN000), Group Number (0102860), Patient Relation to Subscriber (Self), and a checked checkbox for Assignment of Benefits.
- Secondary Insurance:** Includes fields for Secondary Insurance (Type to search), Subscriber 2 (Type to search), and Group Number.
- Service Information:** Includes fields for Place of Service (Mobile Unit) and Group.
- Diagnosis Information:** Includes a field for Diagnosis 1 (Type to search).

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

The screenshot shows a billing system interface with a confirmation dialog box in the center. The dialog box is titled "Confirm" and contains the text: "The insurance for this billing has changed. Update the transaction amounts with the new insurance fee schedule?". There are two buttons at the bottom of the dialog: "No" and "Yes". The "Yes" button is highlighted with a red circle. The background interface includes fields for Patient (Banana, Anna), Date (05/21/2026), Description, Secondary Insurance, Patient Relation to Subscriber (Self), Fee Schedule (24 - Aetna PPO), Referring Provider, Preauthorization Date (mm/dd/yyyy), and Diagnosis Information (Diagnosis 1, 2, 3, 4).

19

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

A screenshot of a billing form interface. A modal dialog box titled "Confirm" is centered on the screen, asking "Do the transactions need to be billed to the new insurance?". The dialog has "No" and "Yes" buttons. The "Yes" button is circled in red. The background form is dimmed and shows fields for Patient (Banana, Anna), Date (05/21/2026), Description, Secondary Insurance, Patient Relation to Subscriber, Fee Schedule (24 - Aetna PPO), Referring Provider, and Diagnosis Information.

20

Click "Save Changes"

A screenshot of the "Billing" form in the "flow by Dentimax" application. The left sidebar contains a menu with "General", "Save Changes", and "Cancel Changes". The "Save Changes" option is highlighted with a red box. The main form area is titled "Billing" and contains sections for "Billing Info", "Primary Insurance", "Secondary Insurance", "Service Information", and "Diagnosis Information". The "Primary Insurance" section shows "AE101 - Aetna PPO" as the Primary Insurance, "Banana, Anna - BANAN000" as the Subscriber, and "898628-31-000" as the Group Number. The "Secondary Insurance" section is empty. The "Service Information" section shows "Mobile Unit" as the Place of Service. The "Diagnosis Information" section is empty.

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

The screenshot shows a software interface for managing transactions. On the left, a sidebar contains several menu items. Under the 'Claim Info' section, the 'Create Claim' option is circled in red. The main area displays a transaction ledger for 'Banana, Anna - BANAN000' at '1035, 5/2... Second Office'. It includes a table of transactions with columns for Date, Name, Billing, Code, Description, Provider, Tooth, Surface, Amount, Status, and Insurance. Two transactions are listed: one for a crown on 7/9/26 and another for a prefabricated post on 7/9/26. A summary table on the right shows insurance charges, adjustments, and a total current balance of \$1,390.52.

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

Transaction Details:

Patient: Banana, Anna - BANAN000 | Office: 1035, 5/2... Second Office

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

Detail View | Sort by Date

Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1
7/9/26	Anna	1035	D2750	crown - porcelain fused to high noble me	ARQ00	4		\$1,213.50	Completed	\$0.00				\$1,213.50	
7/9/26	Anna	1035	D2954	prefabricated post and core in addition to	ARQ00			\$177.02	Completed	\$0.00				\$177.02	

Insurance Summary:

Insurance	Est Due	Charges:
Ins 1: Aetna PPO	\$625.26	Adjustments:
Ins 2: None	\$0.00	Ins Pmts:
HOH: Banana, Anna	\$765.26	Patient Pmts:
		Total:
		Current \$1,390.52

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.

The screenshot shows a 'Confirm' dialog box overlaid on the software interface. The dialog box contains the text: '1 claim has been created and requires 1 attachment. Do you want to view it now?'. There are two buttons: 'No' and 'Yes'. The 'Yes' button is circled in red. The background shows a summary table with insurance charges, adjustments, and a total current balance of \$1,390.52. Below the dialog box, a table lists transactions with columns for Description, Pat Adj, Bal, Ins1 Paid, Ins2 Paid, Updated By, Claim Number, and Note. Two transactions are listed: a crown and a prefabricated post, both with a balance of \$1,213.50 and \$177.02 respectively, and updated by 'Laurel'.

Confirm

1 claim has been created and requires 1 attachment. Do you want to view it now?

Transaction Summary:

Description	Pat Adj	Bal	Ins1 Paid	Ins2 Paid	Updated By	Claim Number	Note
750 crown - porcelain fused to high noble me		\$1,213.50	☒		Laurel		
354 prefabricated post and core in addition to		\$177.02	☒		Laurel		

View: Detail - All | Post Date: 07/27/2026

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

Send E-Claim
Get Claim Status

Attachments
Check Attachment Requirements
Add Attachment

Patient Info
View Patient Info
View Billing Info

Print
Print Claim

ADA American Dental Association® Dental Claim Form

HEADER INFORMATION

1. Type of Transaction (Mark all applicable boxes) ☐ Request for Predetermination/Preauthorization
☒ Statement of Actual Services ☐ EPSDT / Title XIX

2. Predetermination/Preauthorization Number

DENTAL BENEFIT PLAN INFORMATION

3. Company/Plan Name, Address, City, State, Zip Code
Aetna PPO
Dental Division
P.O. Box 14094
Lexington, KY 40512-4094

3a. Payer ID 60054

OTHER COVERAGE (Mark applicable box and complete items 5-11. If none, leave blank.)

4. Dental? ☐ Medical? ☐ (If both, complete 5-11 for dental only.)

5. Name of Policyholder/Subscriber in #4 (Last, First, Middle Initial, Suffix)

6. Date of Birth (MM/DD/CCYY) mm/dd/yyyy 7. Gender ☐ M ☐ F ☐ U 8. Policyholder/Subscriber ID (Assigned by Plan)

9. Plan/Group Number 10. Patient's Relationship to Person named in #5
☐ Self ☐ Spouse ☐ Dependent ☐ Other

11. Other Insurance Company/Dental Benefit Plan Name, Address, City, State, Zip Code
Name
Street 1
Street 2
City, State, & Zip

11a. Other Payer ID

POLICYHOLDER/SUBSCRIBER INFORMATION (Assigned by Plan Named in #3)

12. Policyholder/Subscriber Name (Last, First, Middle Initial, Suffix), Address, City, State, Zip Code
Banana, Anna J
6584
Gilbert, AZ 85234

13. Date of Birth (MM/DD/CCYY) 10/01/2002 14. Gender ☐ M ☐ F ☒ U 15. Policyholder/Subscriber ID (Assigned by Plan) W12165654321

16. Plan/Group Number 898628-31-000 17. Employer Name

PATIENT INFORMATION

18. Relationship to Policyholder/Subscriber in #12 Above
☒ Self ☐ Spouse ☐ Dependent Child ☐ Other 19. Reserved For Future Use

20. Name (Last, First, Middle Initial, Suffix), Address, City, State, Zip Code
Banana, Anna J
6584
Gilbert, AZ 85234

21. Date of Birth (MM/DD/CCYY) 10/01/2002 22. Gender ☐ M ☐ F ☒ U 23. Patient ID/Account # (Assigned by Dentist) BANAN000

RECORD OF SERVICES PROVIDED

	24. Procedure Date (MM/DD/CCYY)	25. Area of Oral Cavity	26. Tooth System	27. Tooth Number(s) or Letter(s)	28. Tooth Surface	29. Procedure Code	29a. Diag. Pointer	29b. Qty	30. Description	31. Fee
1	07/09/2026			4		D2750		1	crown - porcelain fused to high noble metal	\$1,213.50
2	07/09/2026					D2954		1	prefabricated post and core in addition to crown	\$177.02

24

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

General
Close

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

< Ledger

Patient: Banana, Anna - BANAN000 Billing: 1035, 5/2... Second Office

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

Detail View Sort by Date

Search transactions Second Office

Date	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Inst
7/9/26	Anna	1035	D2750	crown - porcelain fused to high noble me	ARQ00	4		\$1,213.50	Completed	\$0.00				\$1,213.50	
7/9/26	Anna	1035	D2954	prefabricated post and core in addition to	ARQ00			\$177.02	Completed	\$0.00				\$177.02	

Billing Information

Insurance	Est Due	Charges:
Ins 1: Aetna PPO	\$625.26	Adjustments:
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HOH: Banana, Anna	\$765.26	Patient Pmts:
		Total:
		Current \$1,390.52