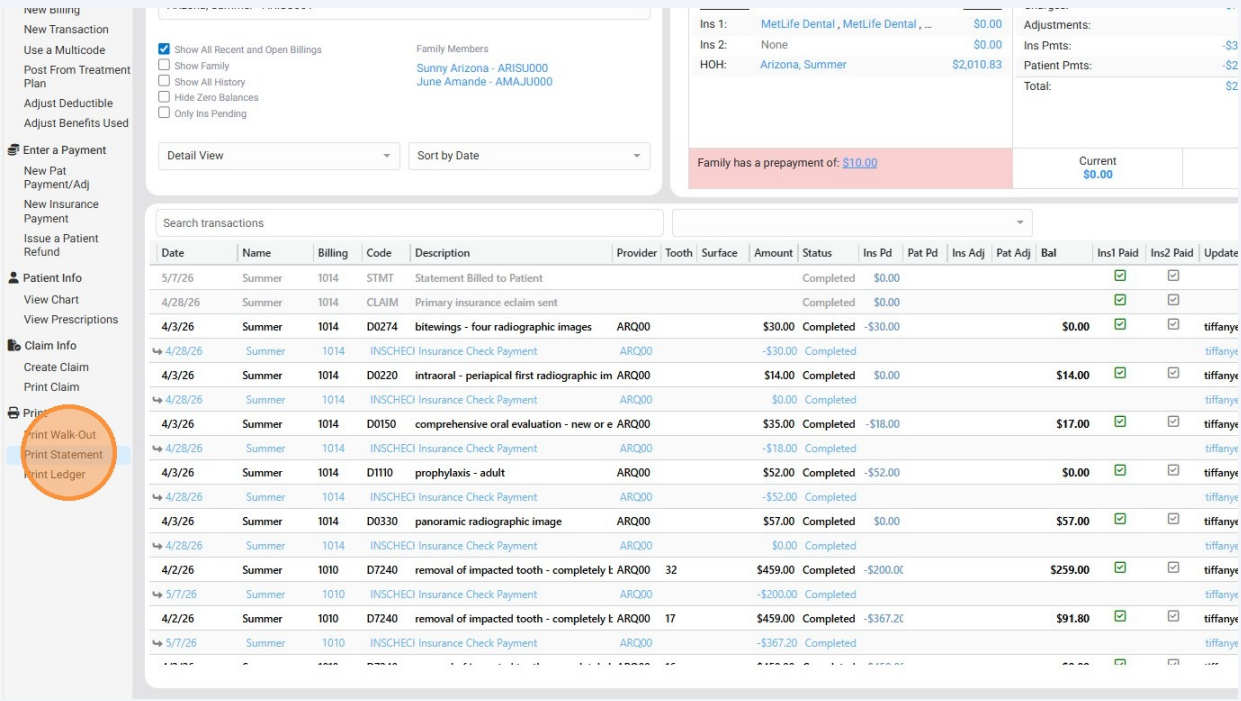
Print Patient Statements

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

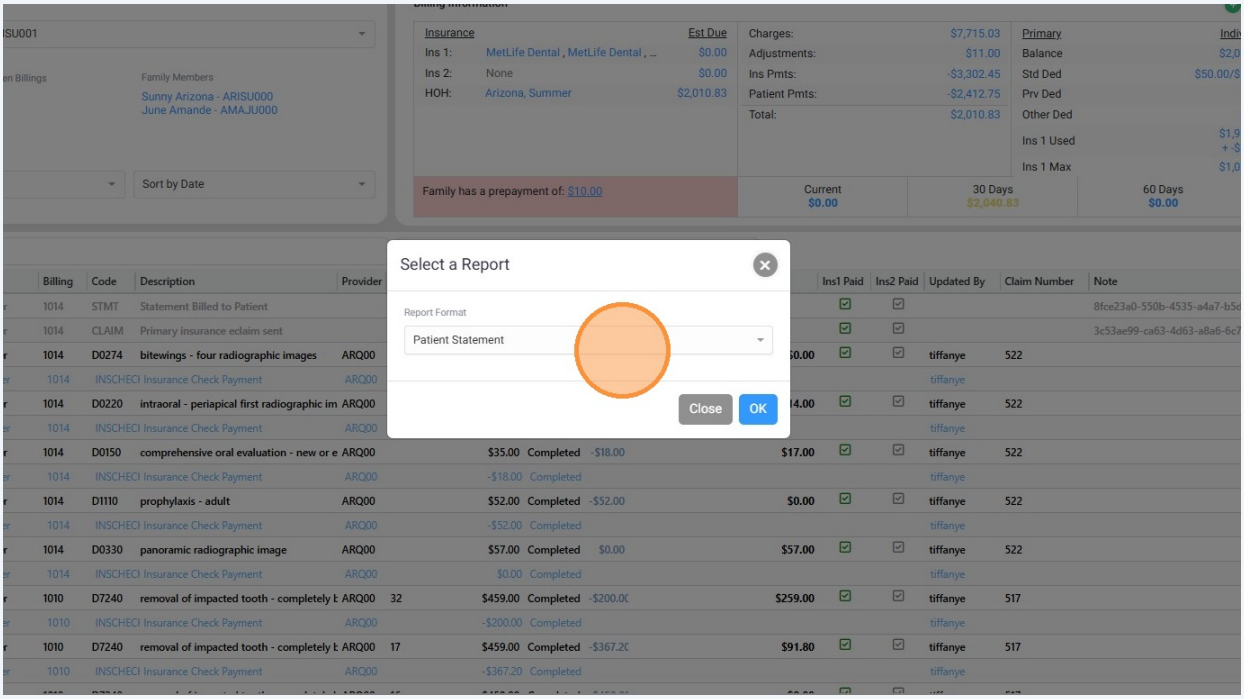
Learn how to generate patient statements and customize your practice messaging to ensure accurate billing communications. This guide walks you through the setup process and statement preview functionality to help you manage your accounts receivable efficiently.

Statement Generation

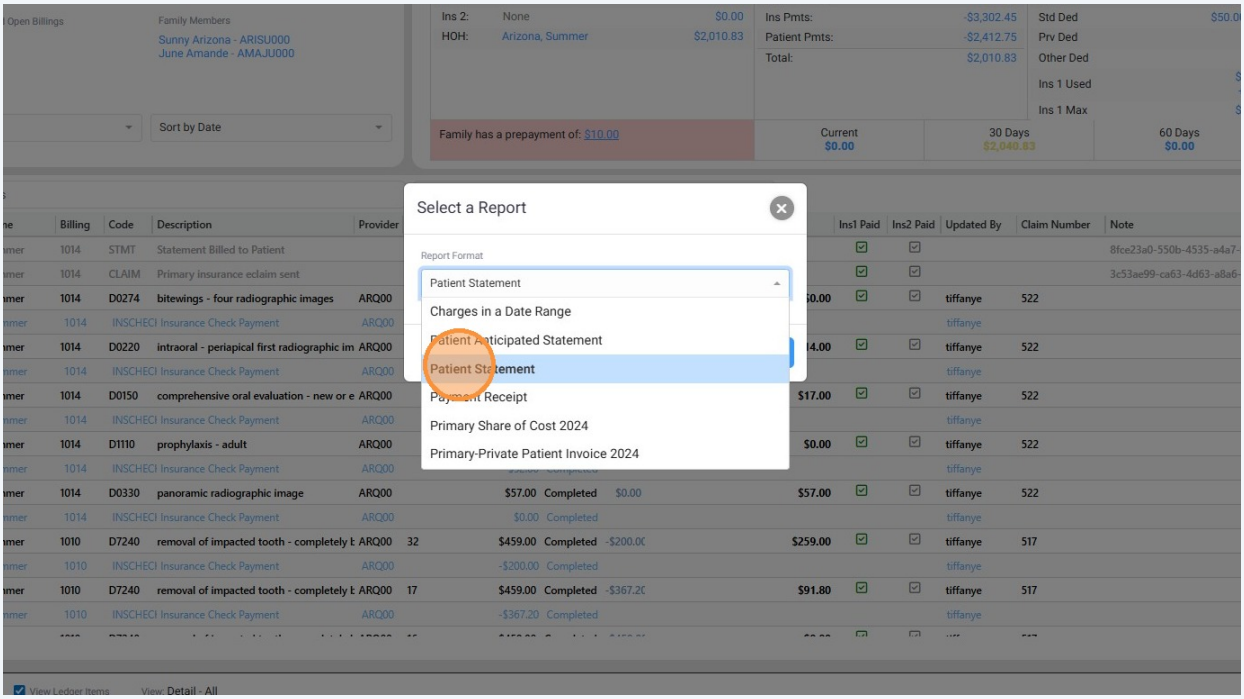
1 Click Print Statement.



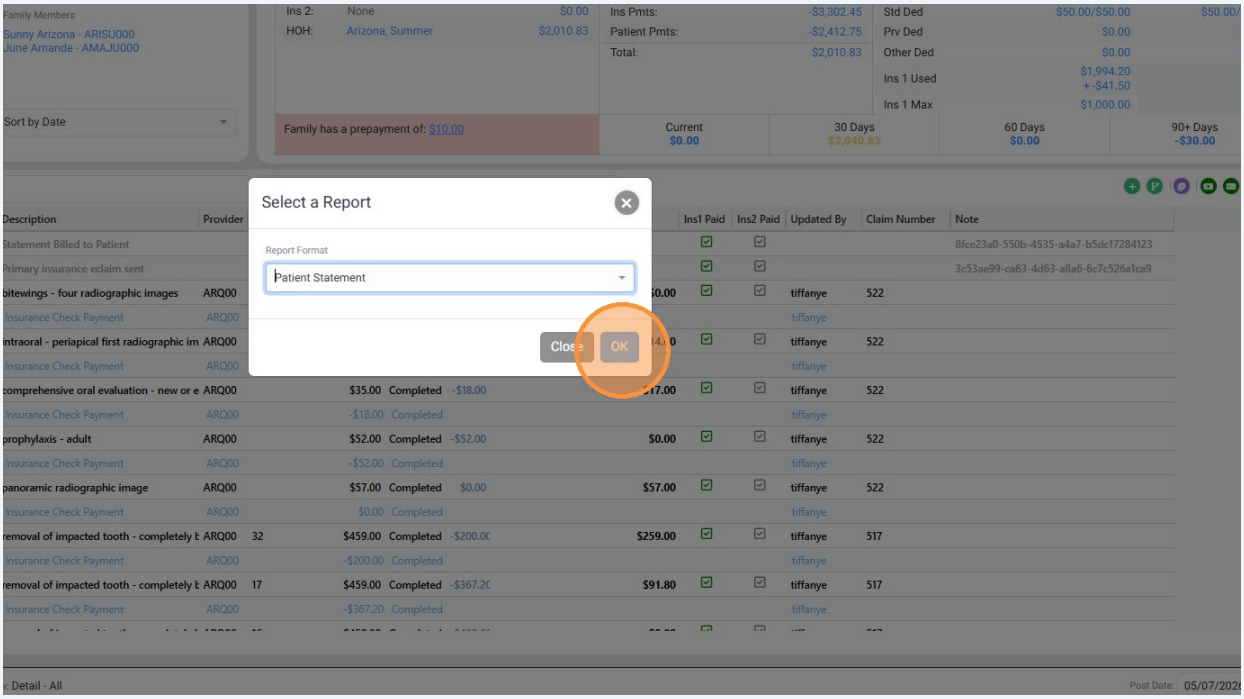
2 Click here



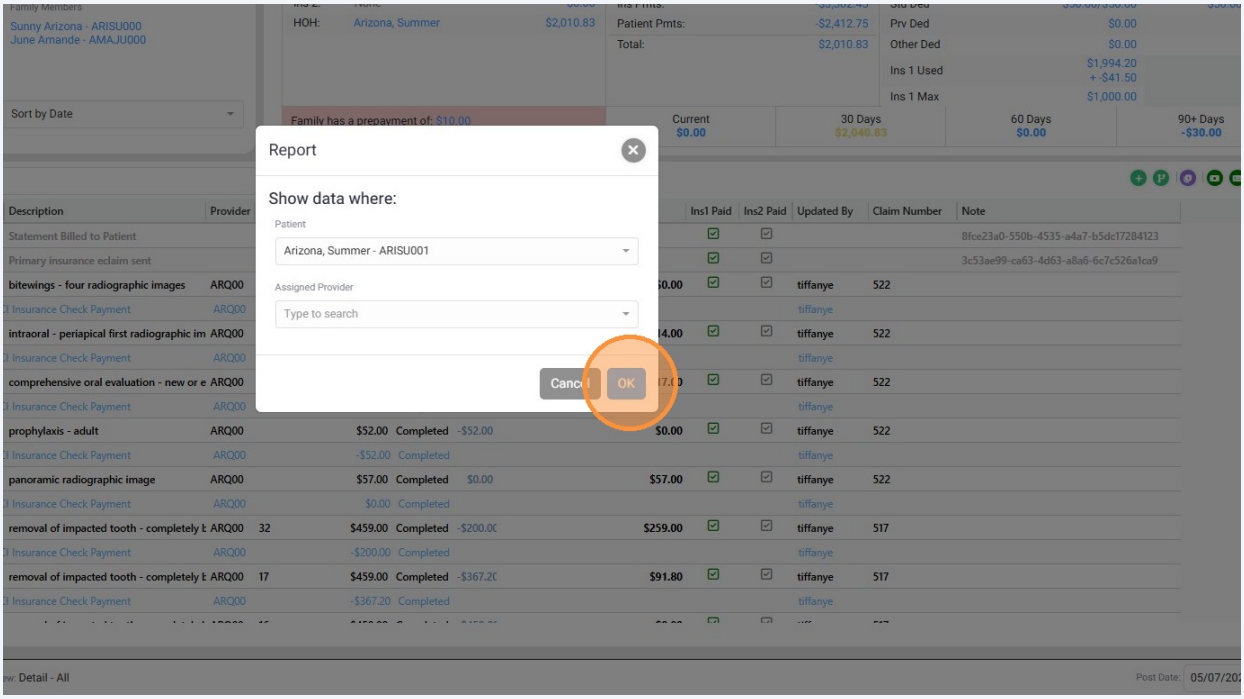
3 Select 'Patient Statement' from the Report Format dropdown.



4 Click "OK"



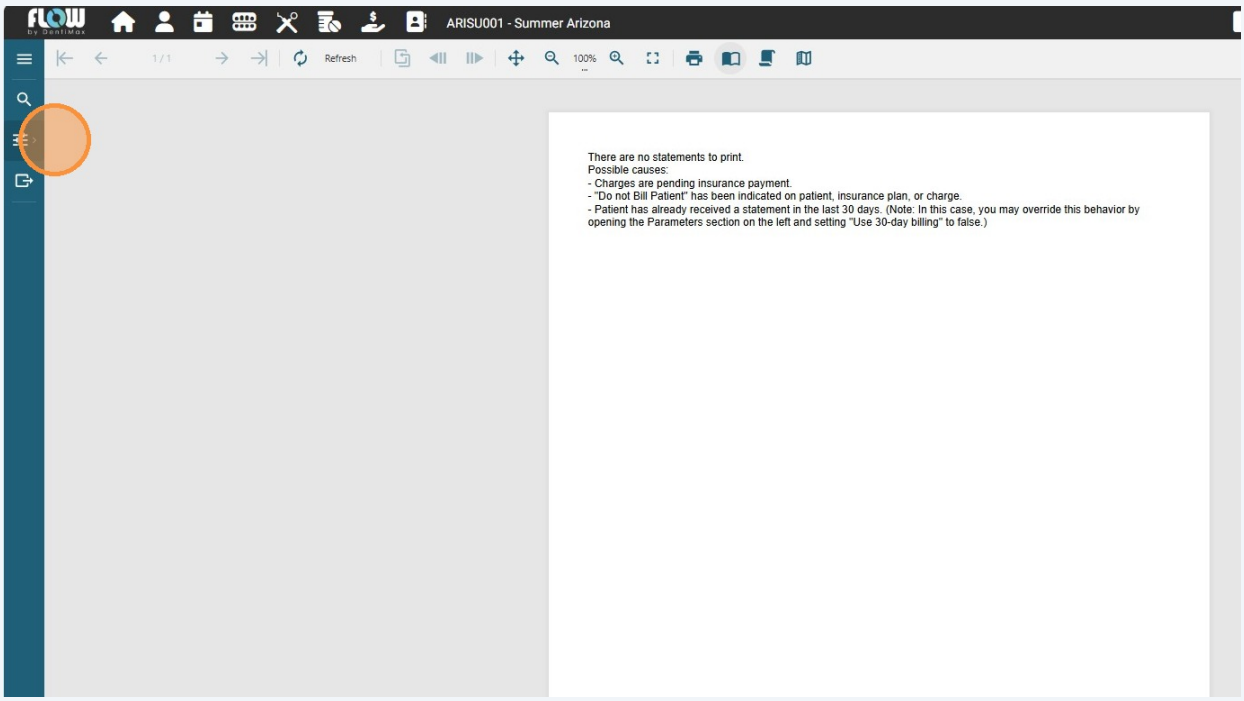
5 Confirm the report parameters by clicking OK.



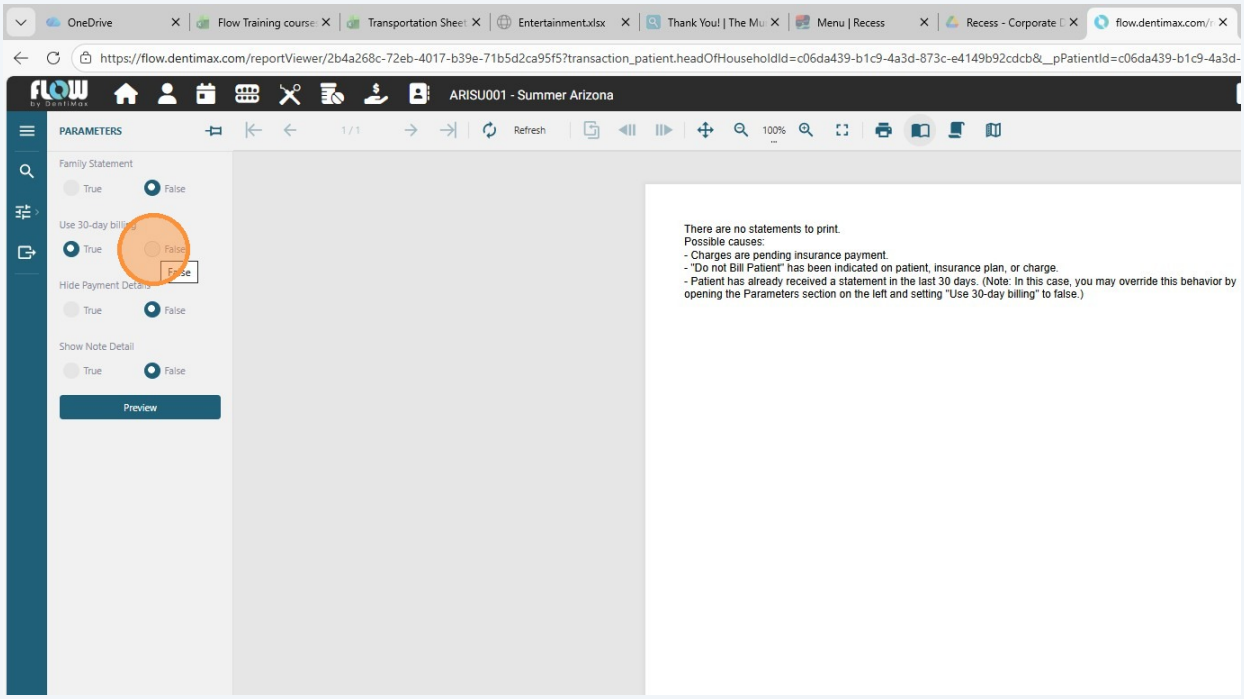
6 Printed Patient Statements have an automatic 30 day timer set. This means that when printing statements; any patients that have been printed will not print again within 30 days. This is set to avoid the repeat statements being sent multiple times to a patient. Or having to sift through printed statements and removing duplicates.

VIEWING a patient statement does not set the 30-day timer; it starts from when it is printed.

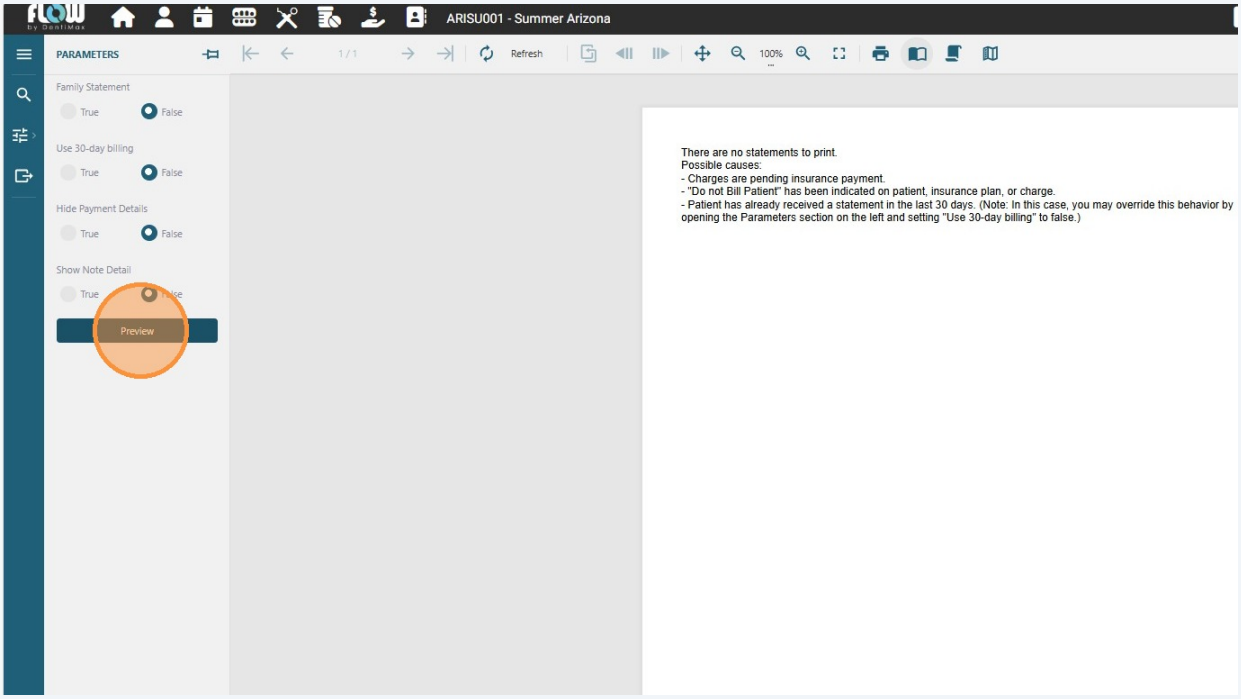
If you would like to remove the 30-day timer to manually Reprint a statement Click "Parameters" on the left menu



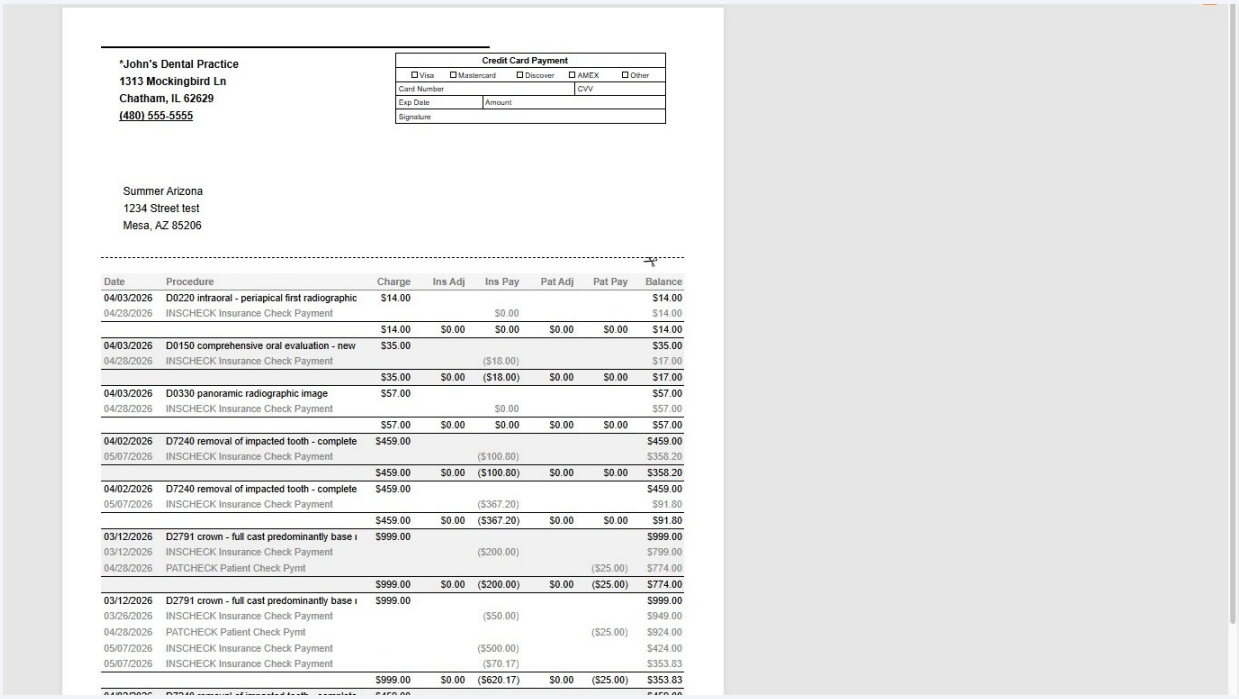
7 Change "Use 30-day Billing" to False



8 Click Preview to view the statement.



9 This will allow a duplicate statement to be printed



*John's Dental Practice
1313 Mockingbird Ln
Chatham, IL 62629
(480) 555-5555

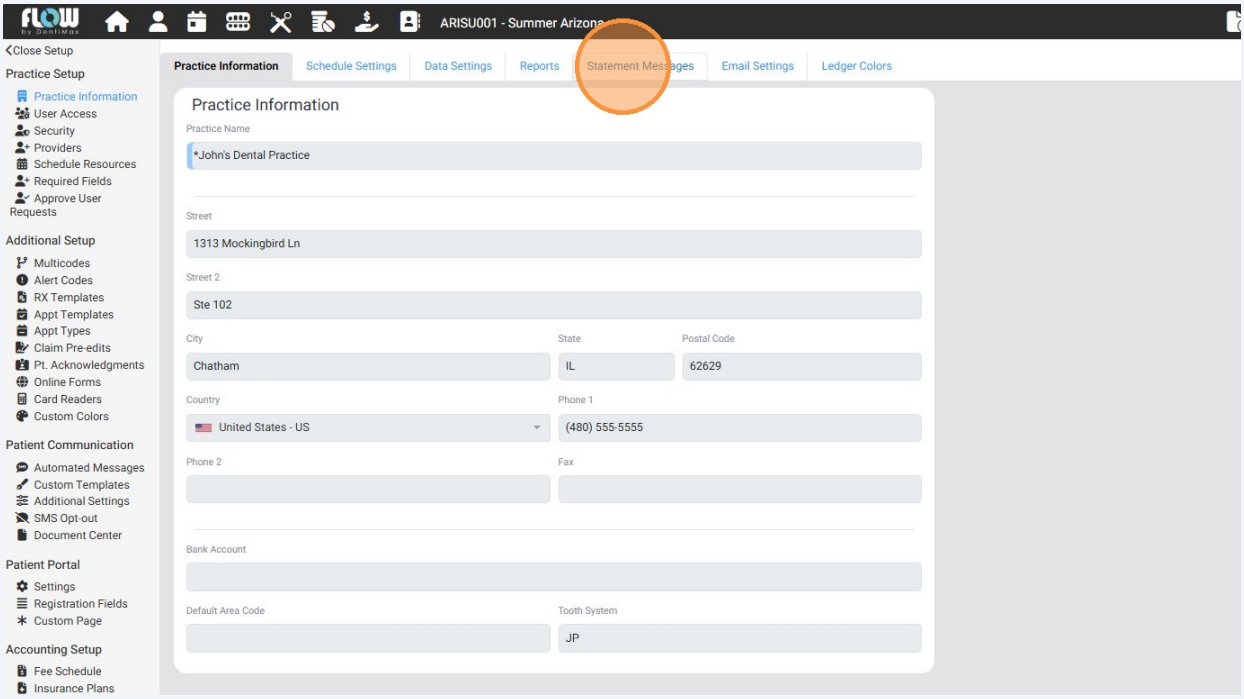
Credit Card Payment
☐ Visa ☐ Mastercard ☐ Discover ☐ AMEX ☐ Other
Card Number | CVV
Exp Date | Amount
Signature

Summer Arizona
1234 Street test
Mesa, AZ 85206

Date	Procedure	Charge	Ins Adj	Ins Pay	Pat Adj	Pat Pay	Balance
04/03/2026	D0220 intraoral - periapical first radiographic	$14.00					$14.00
04/28/2026	INSCHECK Insurance Check Payment			$0.00			$14.00
		$14.00	$0.00	$0.00	$0.00	$0.00	$14.00
04/03/2026	D0150 comprehensive oral evaluation - new	$35.00					$35.00
04/28/2026	INSCHECK Insurance Check Payment			($18.00)			$17.00
		$35.00	$0.00	($18.00)	$0.00	$0.00	$17.00
04/03/2026	D0330 panoramic radiographic image	$57.00					$57.00
04/28/2026	INSCHECK Insurance Check Payment			$0.00			$57.00
		$57.00	$0.00	$0.00	$0.00	$0.00	$57.00
04/02/2026	D7240 removal of impacted tooth - complete	$459.00					$459.00
05/07/2026	INSCHECK Insurance Check Payment			($100.80)			$358.20
		$459.00	$0.00	($100.80)	$0.00	$0.00	$358.20
04/02/2026	D7240 removal of impacted tooth - complete	$459.00					$459.00
05/07/2026	INSCHECK Insurance Check Payment			($367.20)			$91.80
		$459.00	$0.00	($367.20)	$0.00	$0.00	$91.80
03/12/2026	D2791 crown - full cast predominantly base	$999.00					$999.00
03/12/2026	INSCHECK Insurance Check Payment			($200.00)			$799.00
04/28/2026	PATCHECK Patient Check Pymt					($25.00)	$774.00
		$999.00	$0.00	($200.00)	$0.00	($25.00)	$774.00
03/12/2026	D2791 crown - full cast predominantly base	$999.00					$999.00
03/26/2026	INSCHECK Insurance Check Payment			($50.00)			$949.00
04/28/2026	PATCHECK Patient Check Pymt					($25.00)	$924.00
05/07/2026	INSCHECK Insurance Check Payment			($500.00)			$424.00
05/07/2026	INSCHECK Insurance Check Payment			($70.17)			$353.83
		$999.00	$0.00	($620.17)	$0.00	($25.00)	$353.83

10 You do have options to include messages on your statements based on the aging of the balance. To add or make changes to these messages:

From Practice Setup / Practice Information
Select Statement Messages.

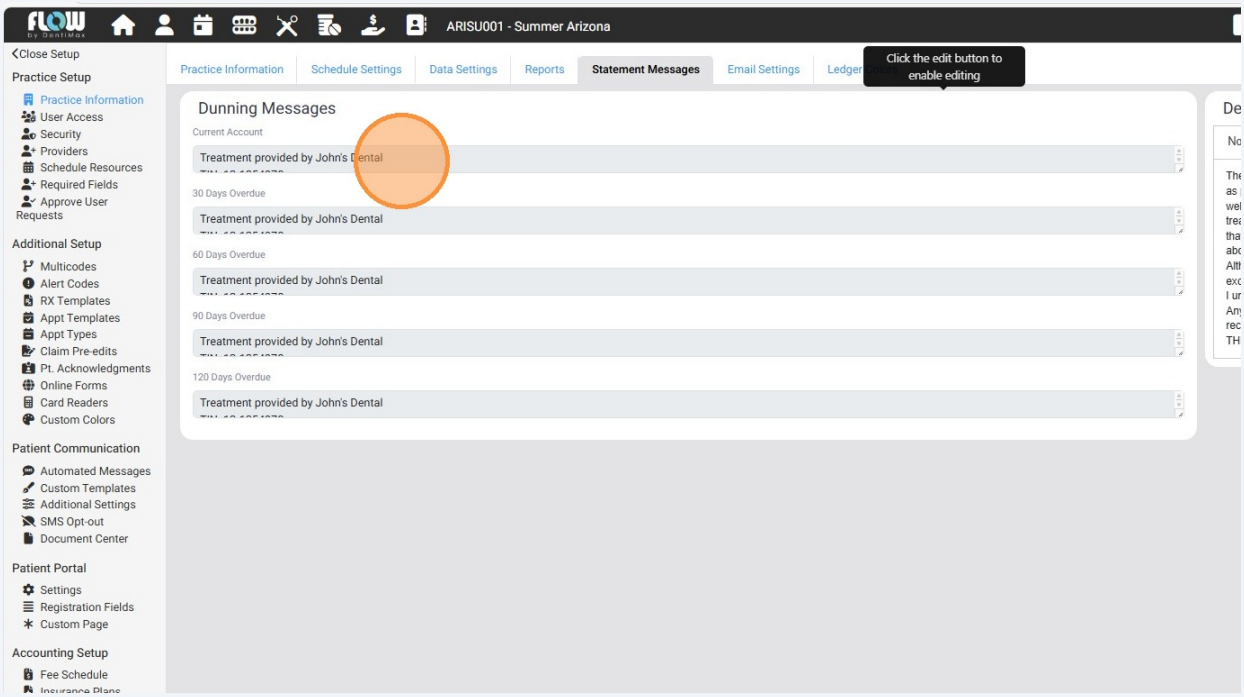


11 You can add any message you would like to populate at the bottom of the statement per aging bucket.

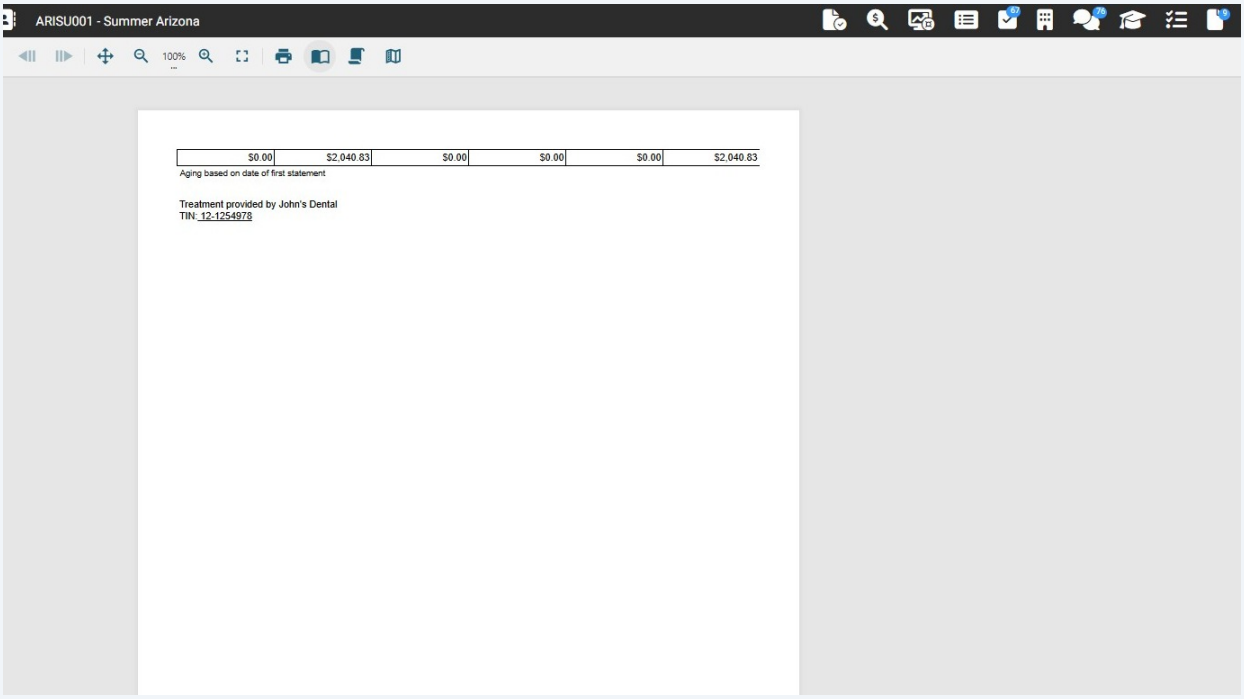
In this example, I did add a note "Treatment provided by... TIN"

This would be one option for you to have that included on your statements. You would need to include this in all aging buckets to be sure that it does print on all statements.

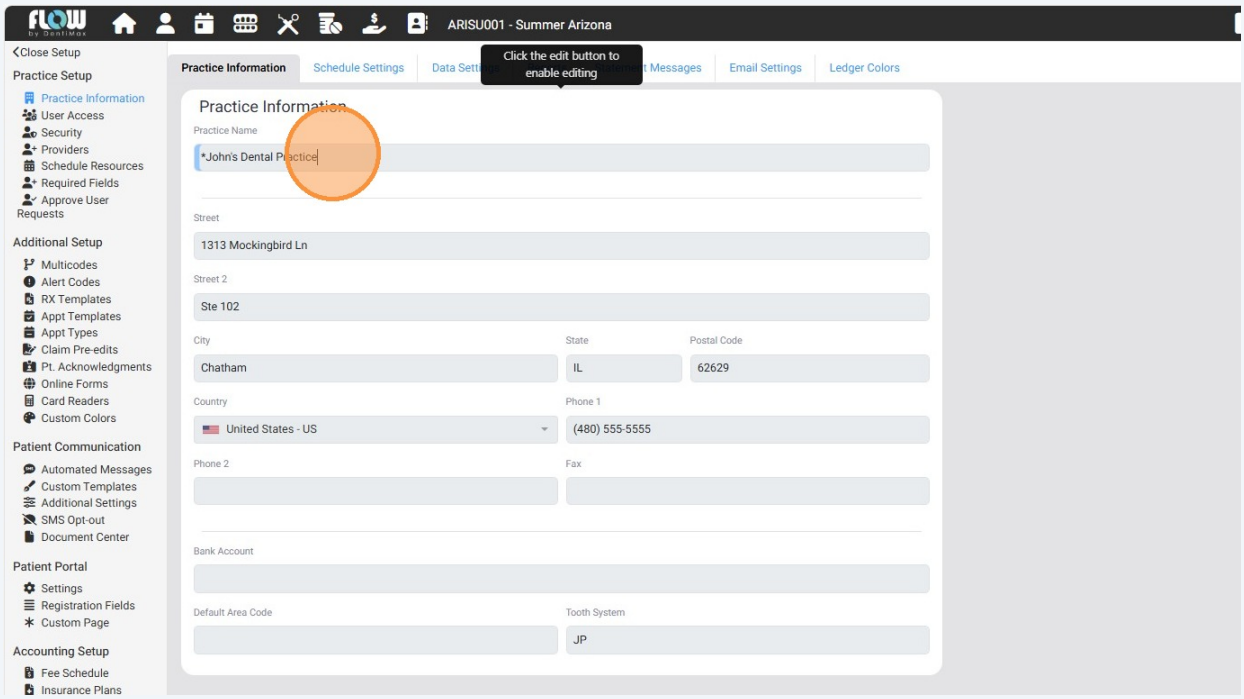
Always remember to save changes



12 This is what it would look like on the statement

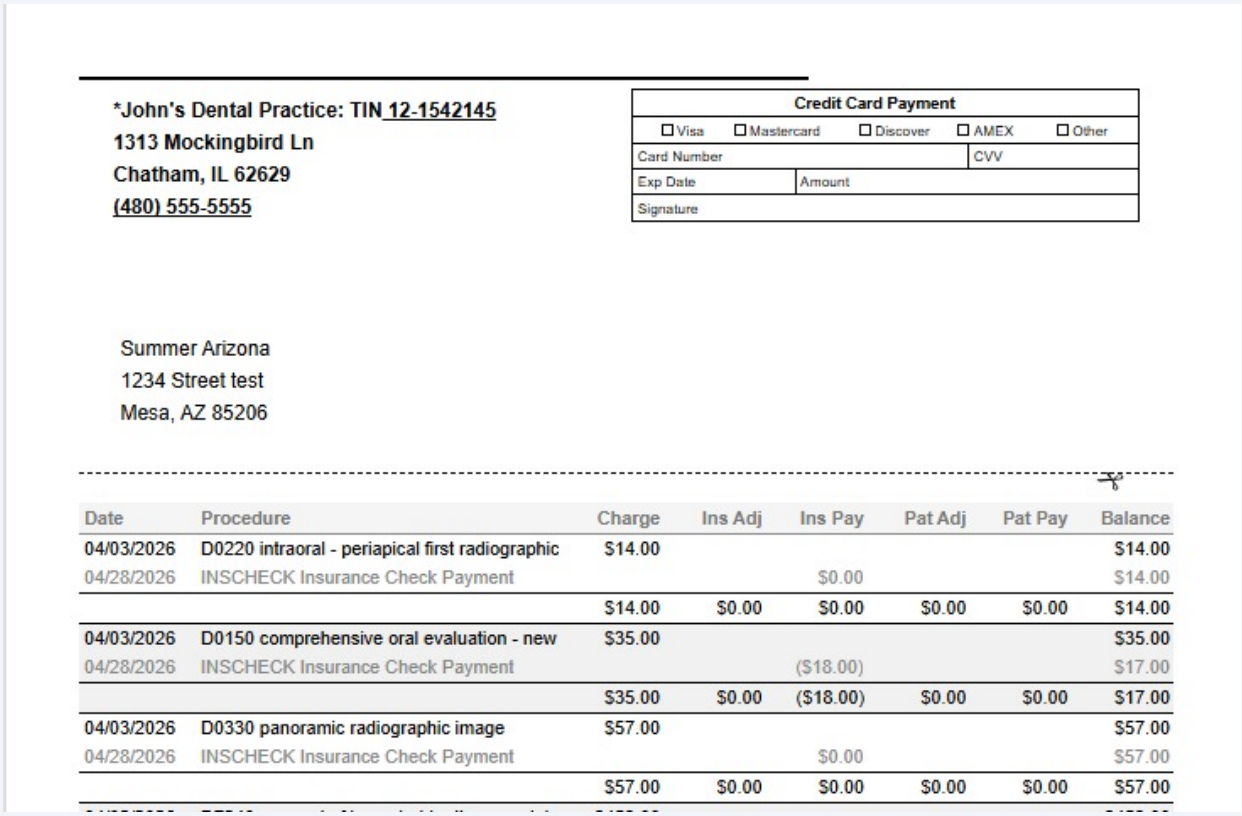


13 The alternative would be to include the TIN with the practice name on Practice Infomation



14 This is what that would look like on the statement

Keep in mind that is you choose this option; this will also print on a claim form as part of the practice name.



*John's Dental Practice: TIN 12-1542145
1313 Mockingbird Ln
Chatham, IL 62629
(480) 555-5555

Credit Card Payment				
☐ Visa	☐ Mastercard	☐ Discover	☐ AMEX	☐ Other
Card Number			CVV	
Exp Date	Amount			
Signature				

Summer Arizona
1234 Street test
Mesa, AZ 85206

Date	Procedure	Charge	Ins Adj	Ins Pay	Pat Adj	Pat Pay	Balance
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		$35.00	$0.00	($18.00)	$0.00	$0.00	$17.00
04/03/2026	D0330 panoramic radiographic image	$57.00					$57.00
04/28/2026	INSCHECK Insurance Check Payment			$0.00			$57.00
		$57.00	$0.00	$0.00	$0.00	$0.00	$57.00

15 As a last option for you would be to have a consult with the custom reports team to see about getting a custom statement report which would include the TIN or NPI after the address and phone number