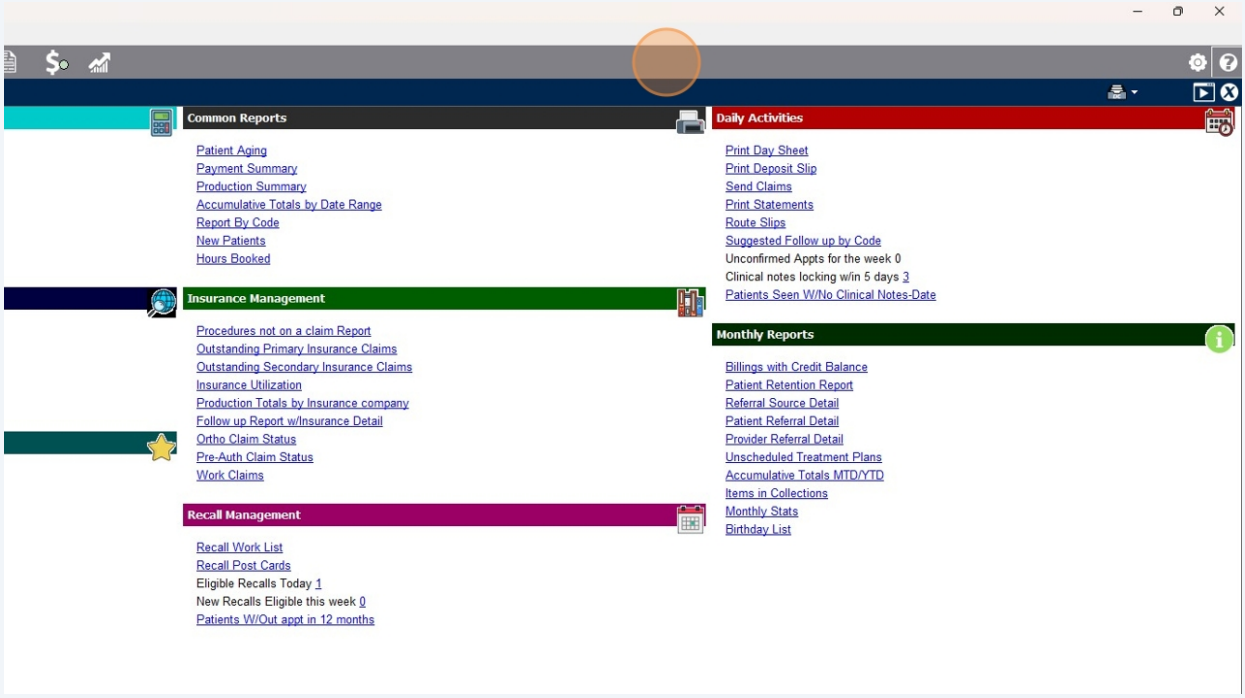
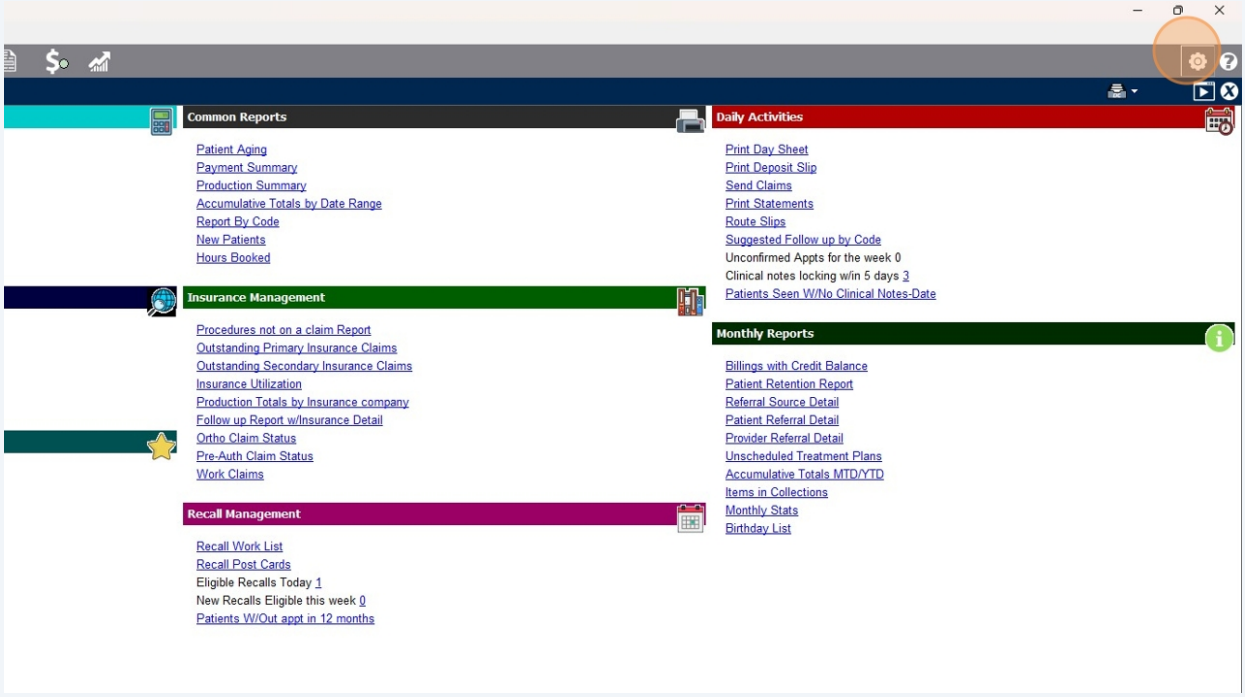
DentiMax: How to forward a CREDIT from previous software to patients ledger as a credit

1 First you will need to create a service code that you would like to use on the patients ledger to distinguish this type of credit.

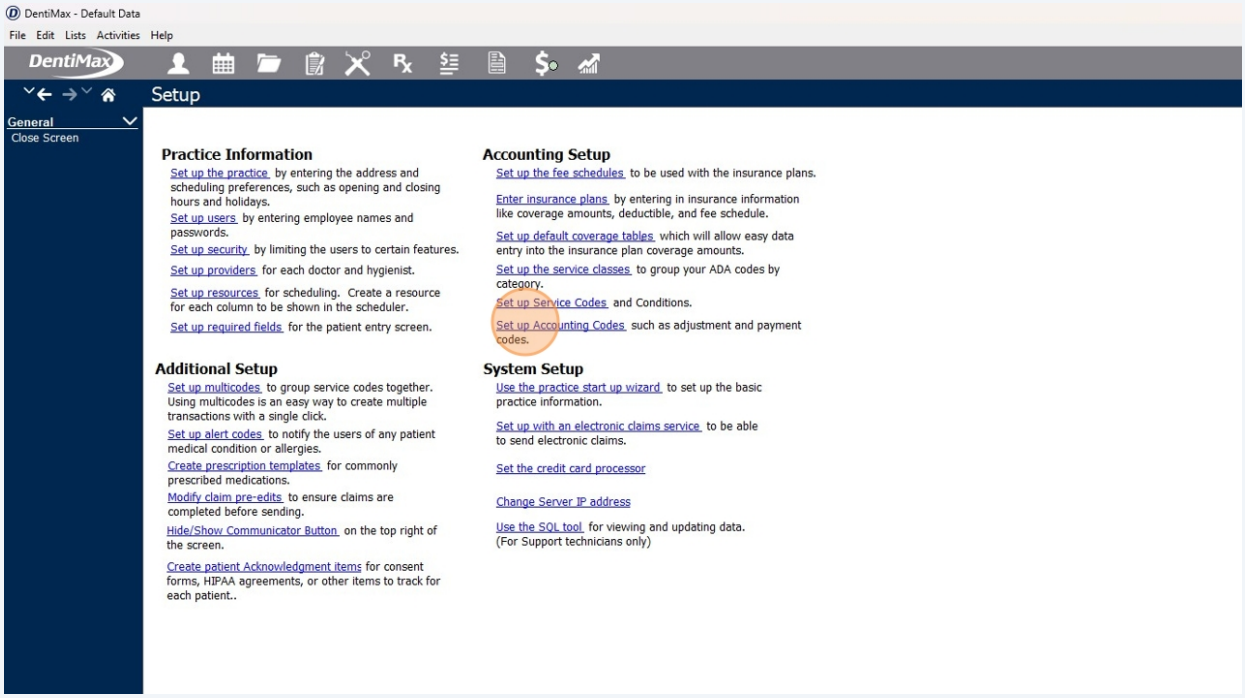
If you have already confirmed you have a code to be using, you can proceed to step 12, patient ledger.



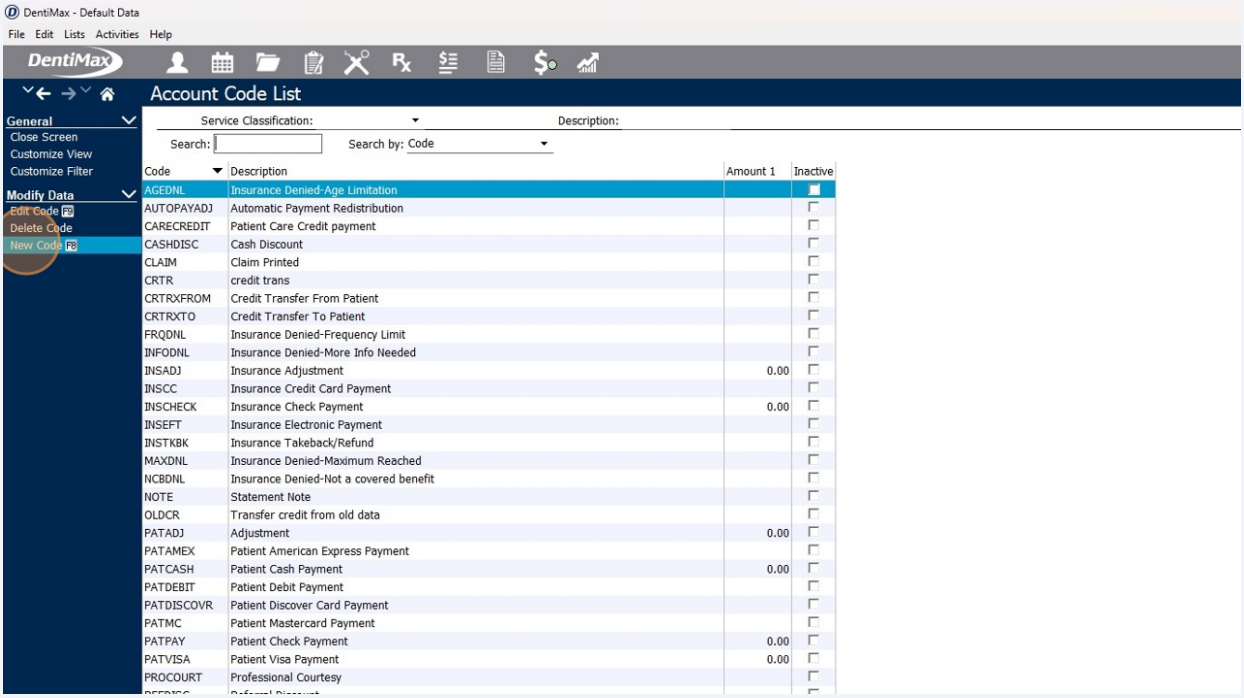
2 Use the "gear" icon to enter practice set up



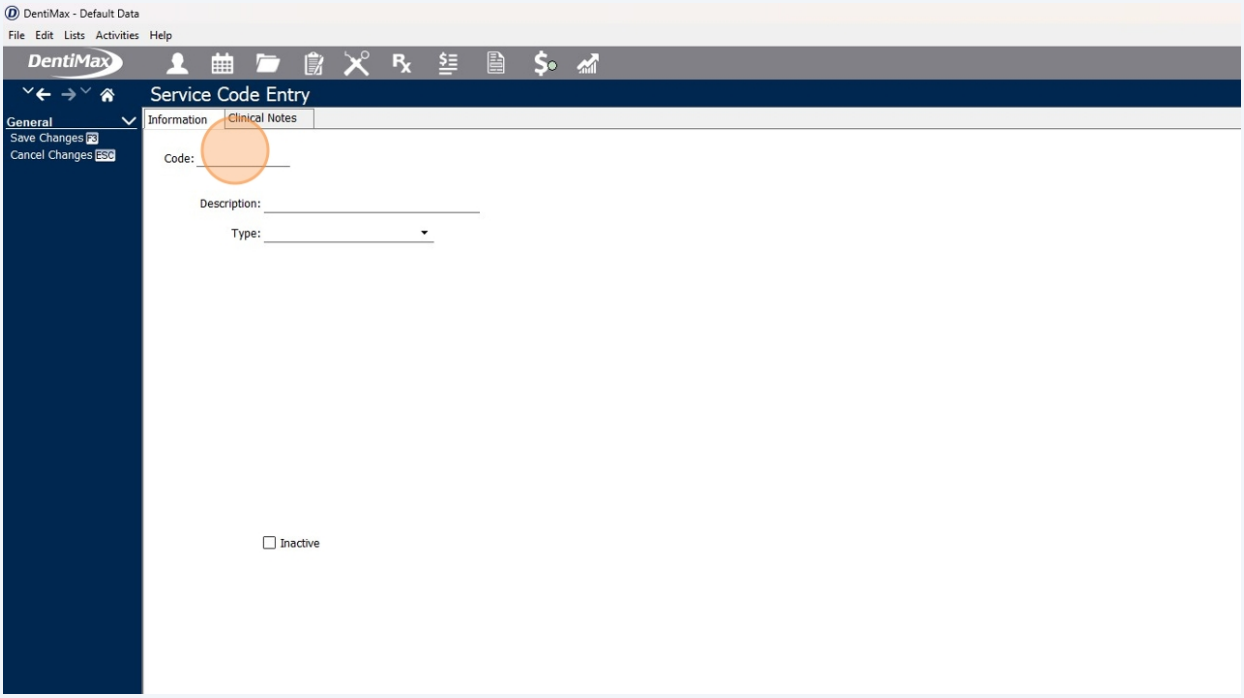
3 Select Set Up Accounting Codes



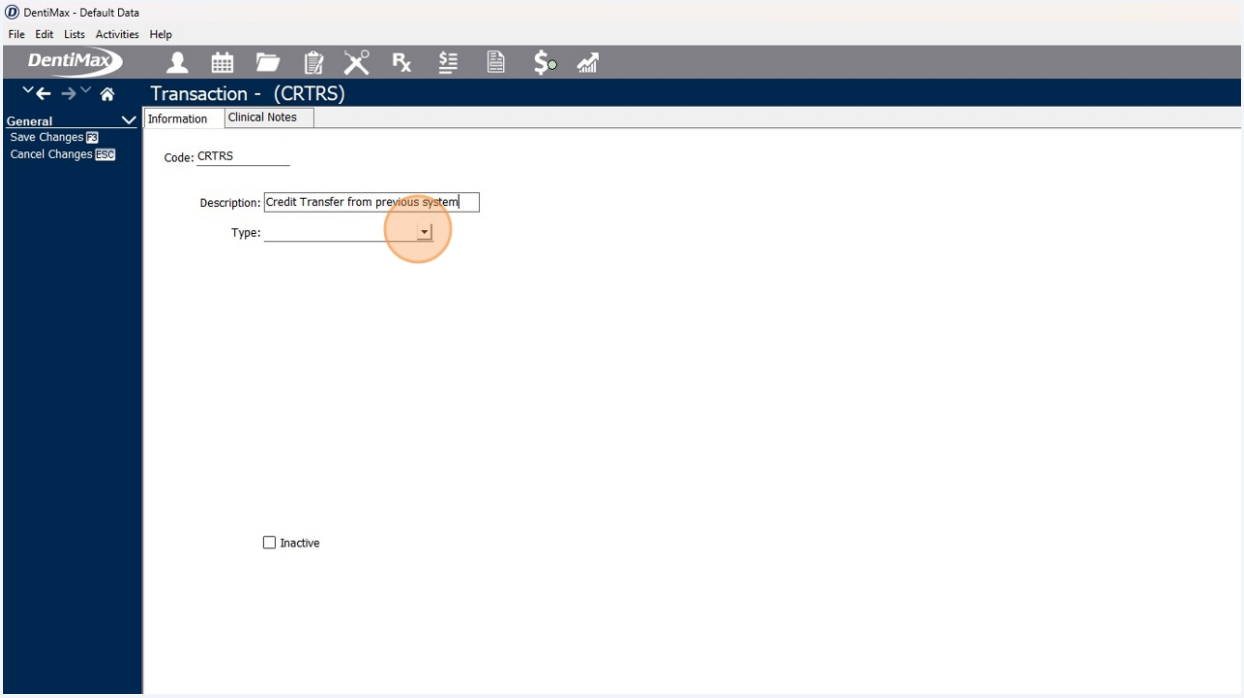
4 Click New Code



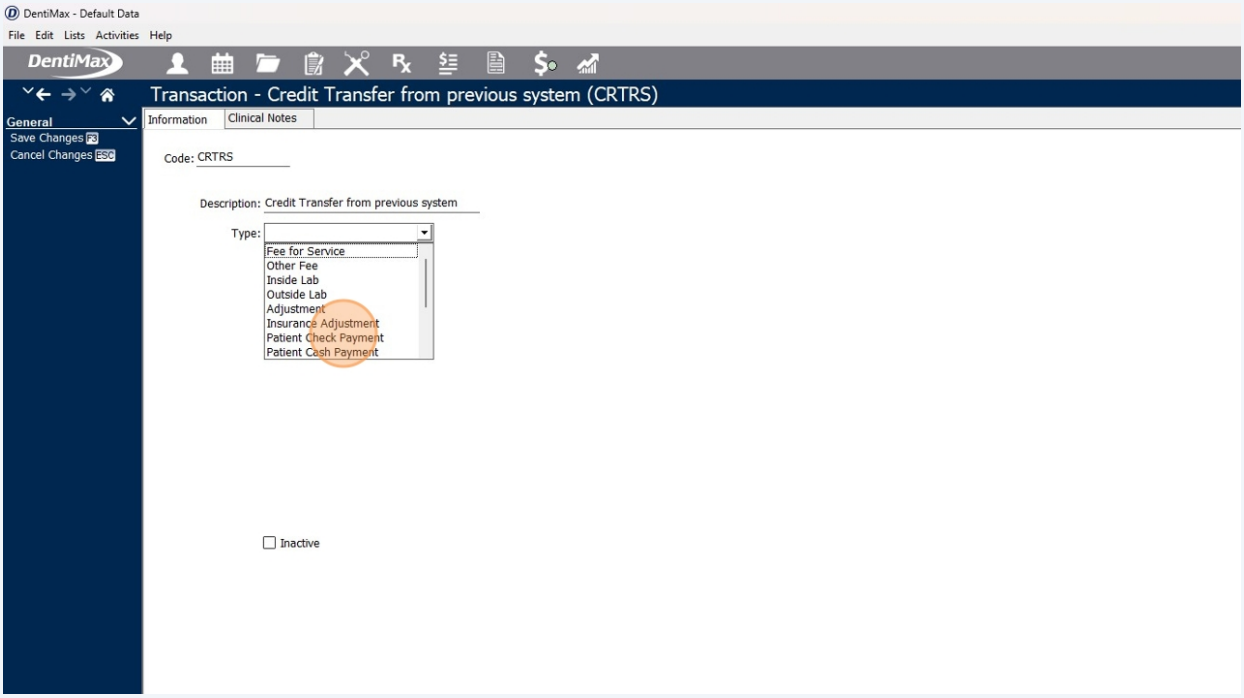
5 Create a 5 character code. example: CRTRS



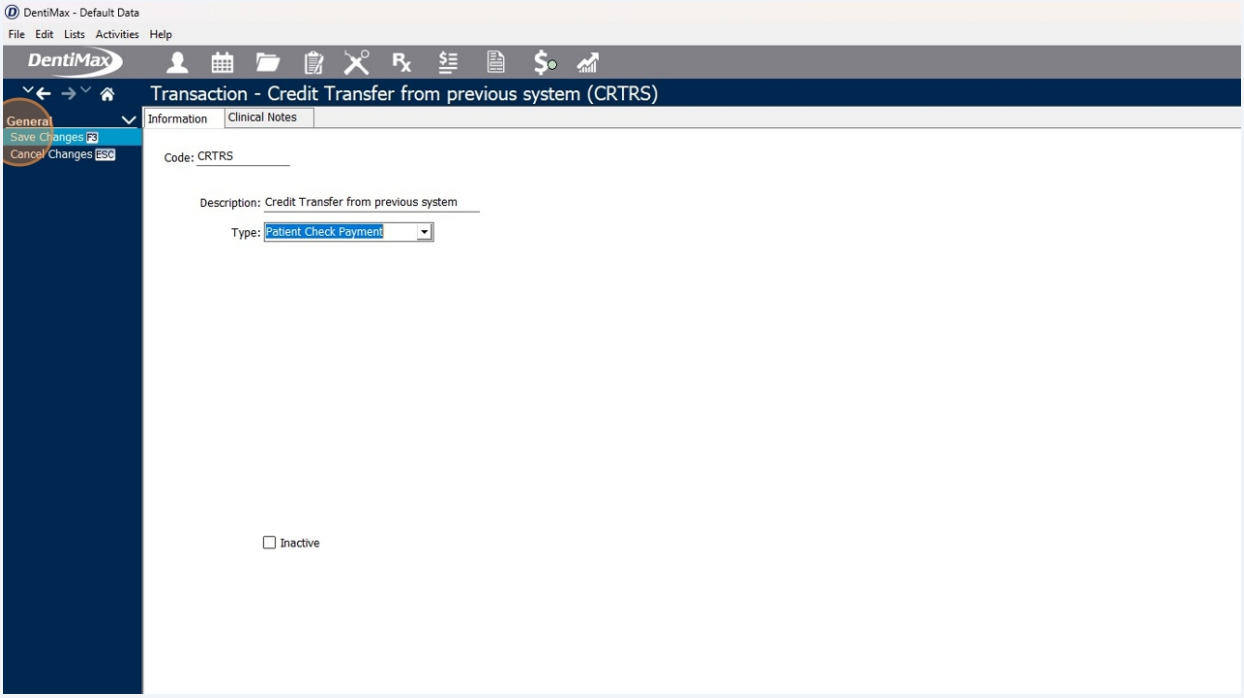
6 Enter the full description. example: Credit Transfer from previous system



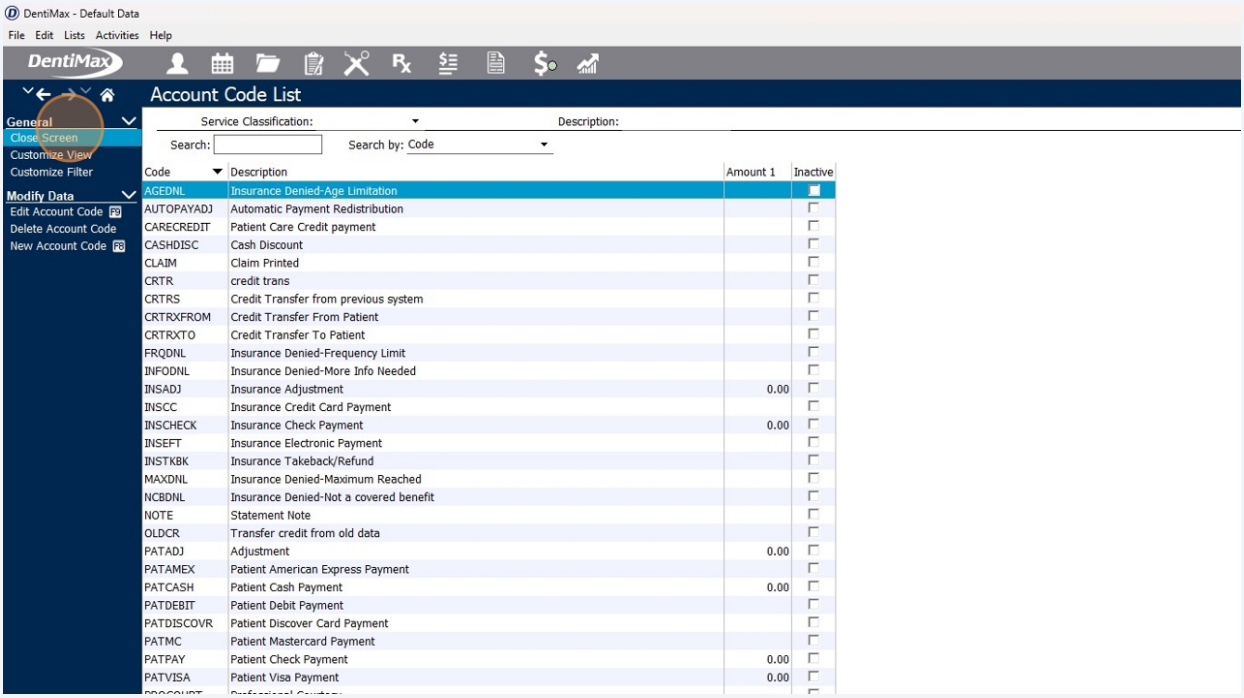
7 Under Type; use the drop-down menu and select "Patient Check Payment"



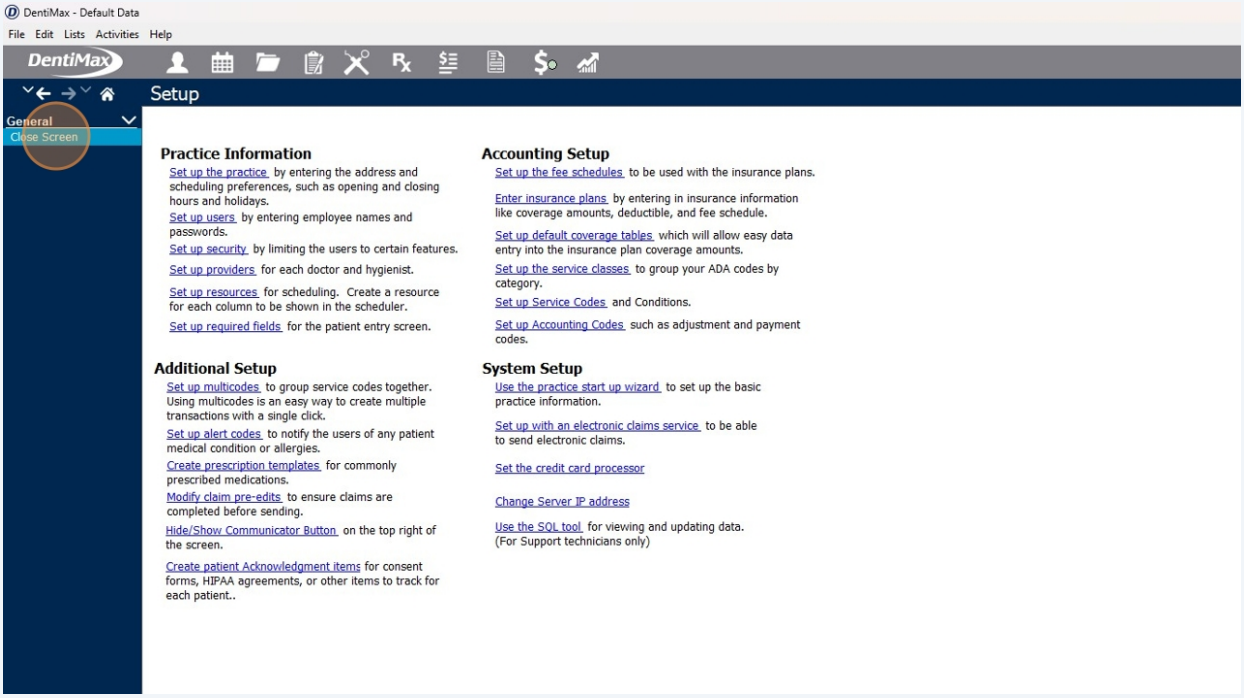
8 Save changes



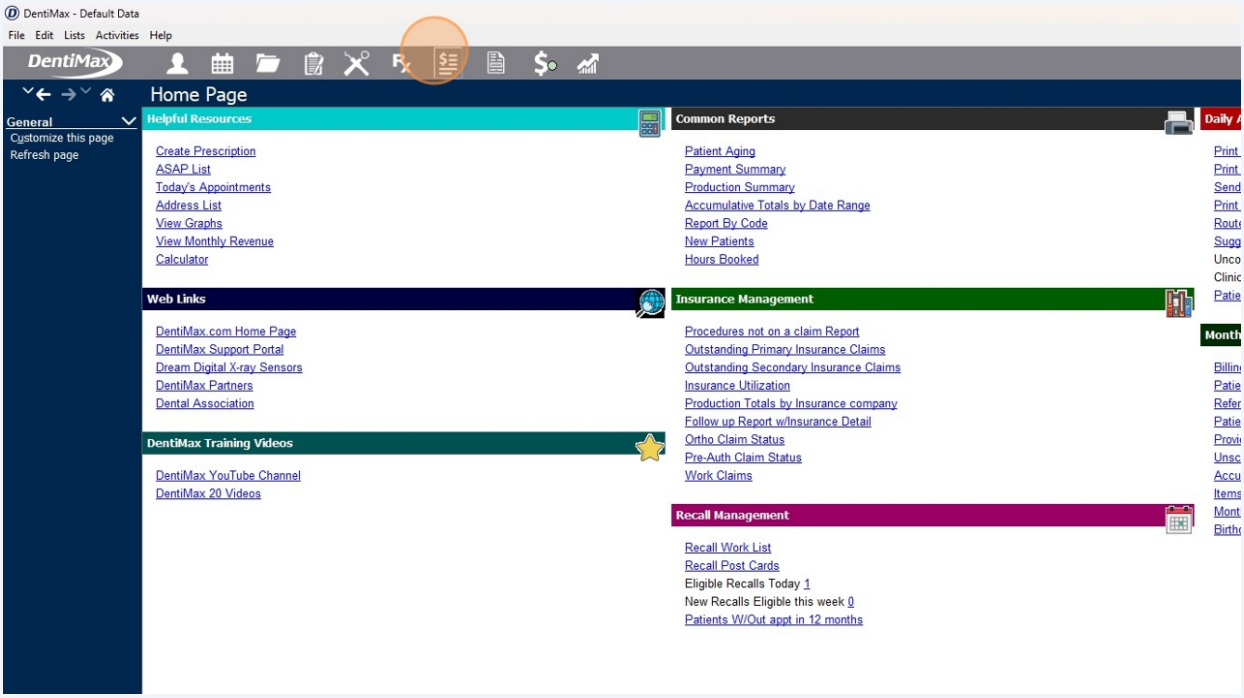
9 Click Close Screen



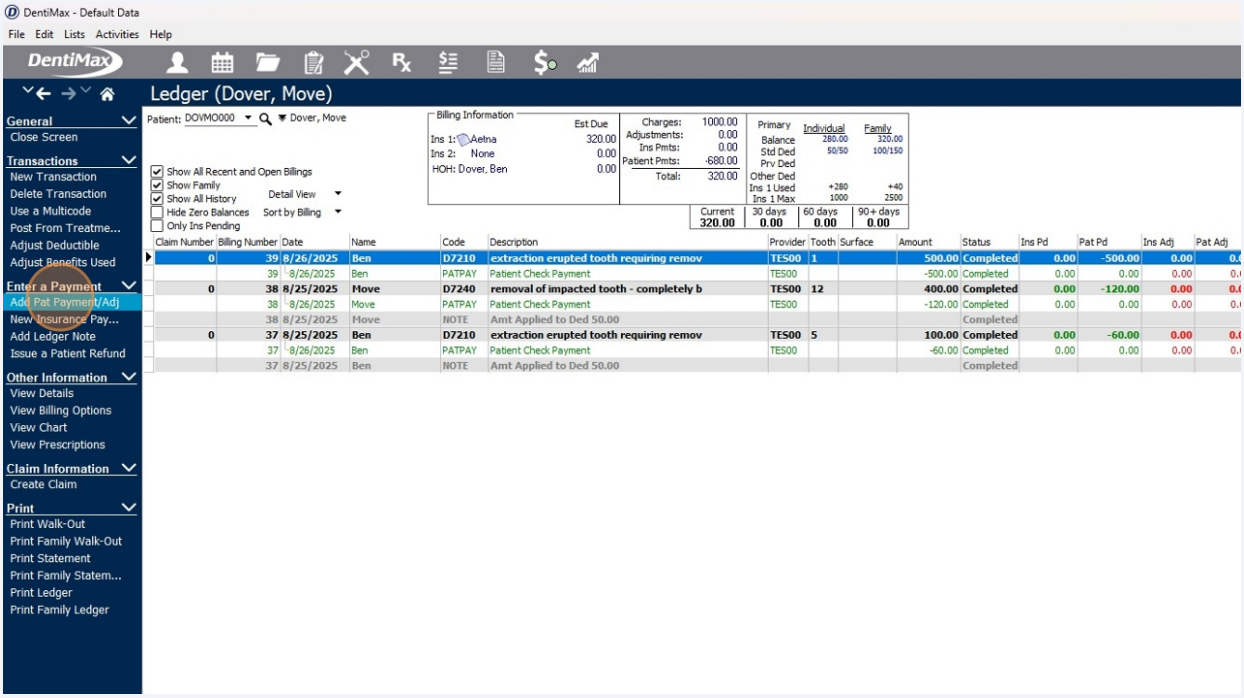
10 Click Close Screen



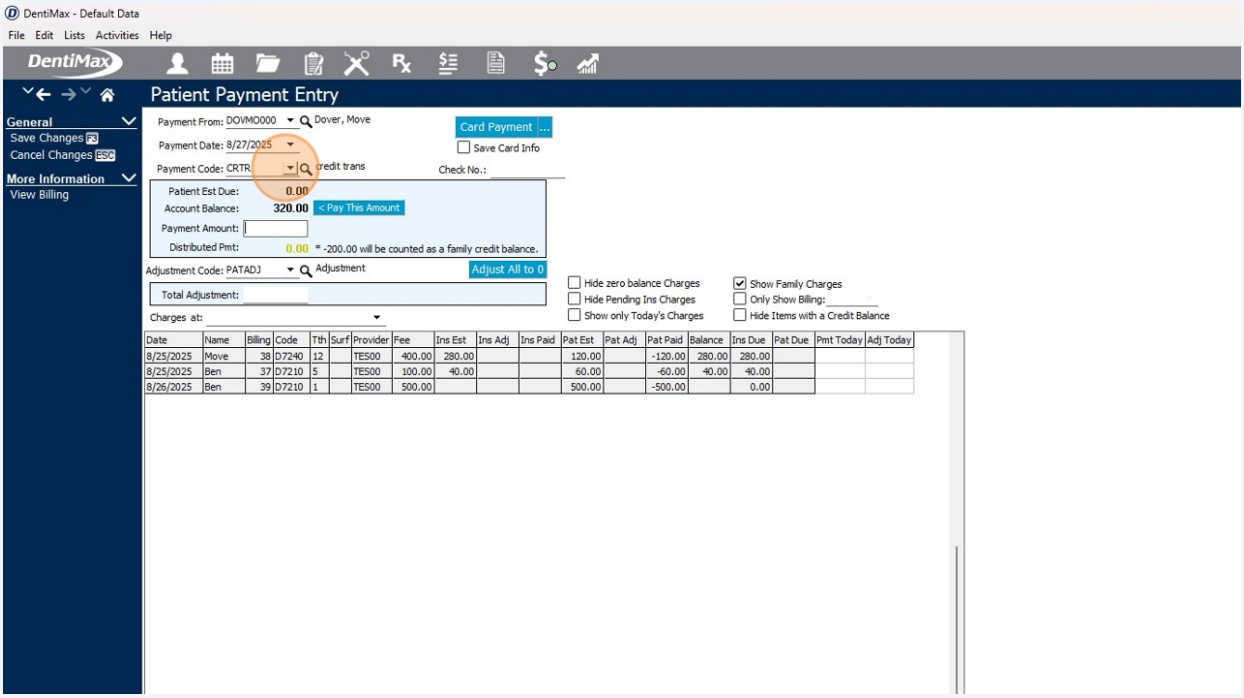
11 Open patient's ledger



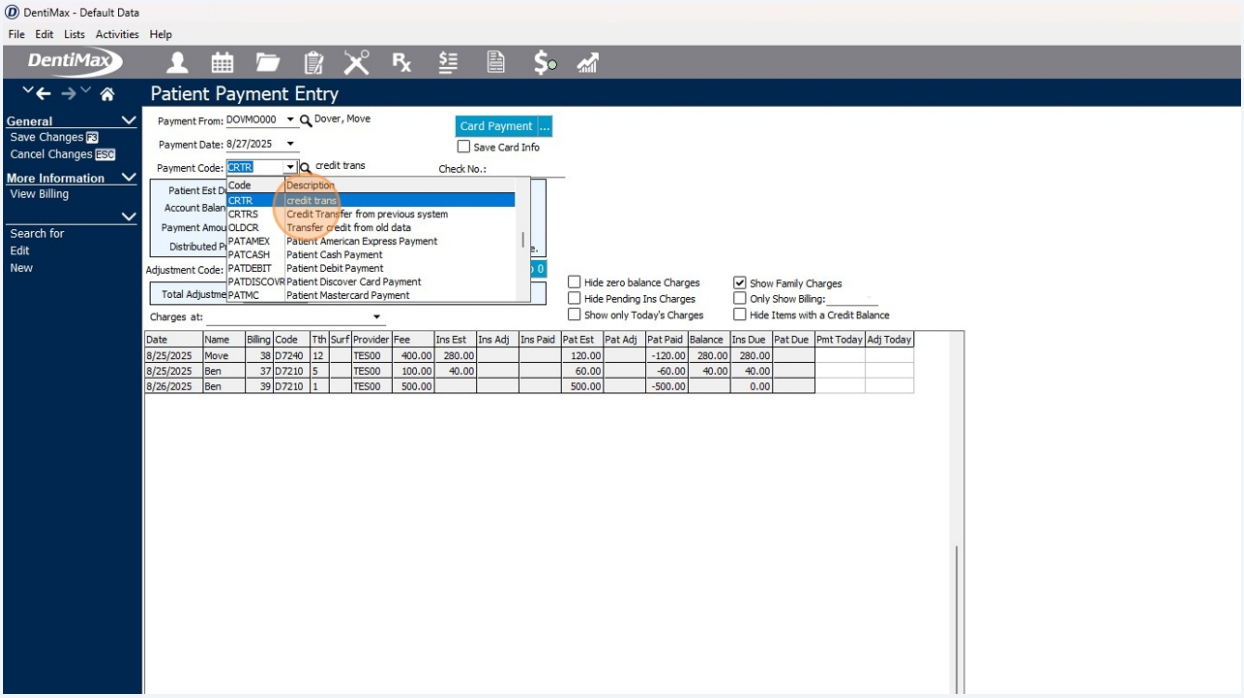
12 Click to Add Pat Payment/Adj



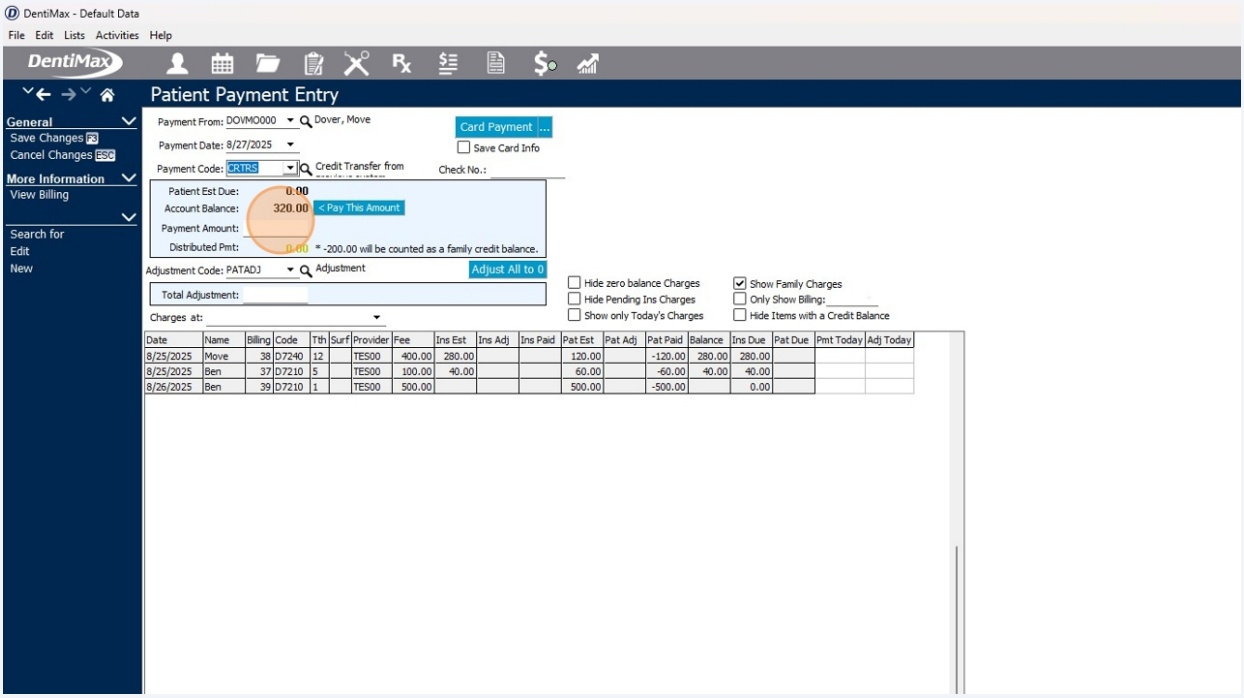
13 For the Payment Code you will enter the credit transfer code you have designated for this type of credit



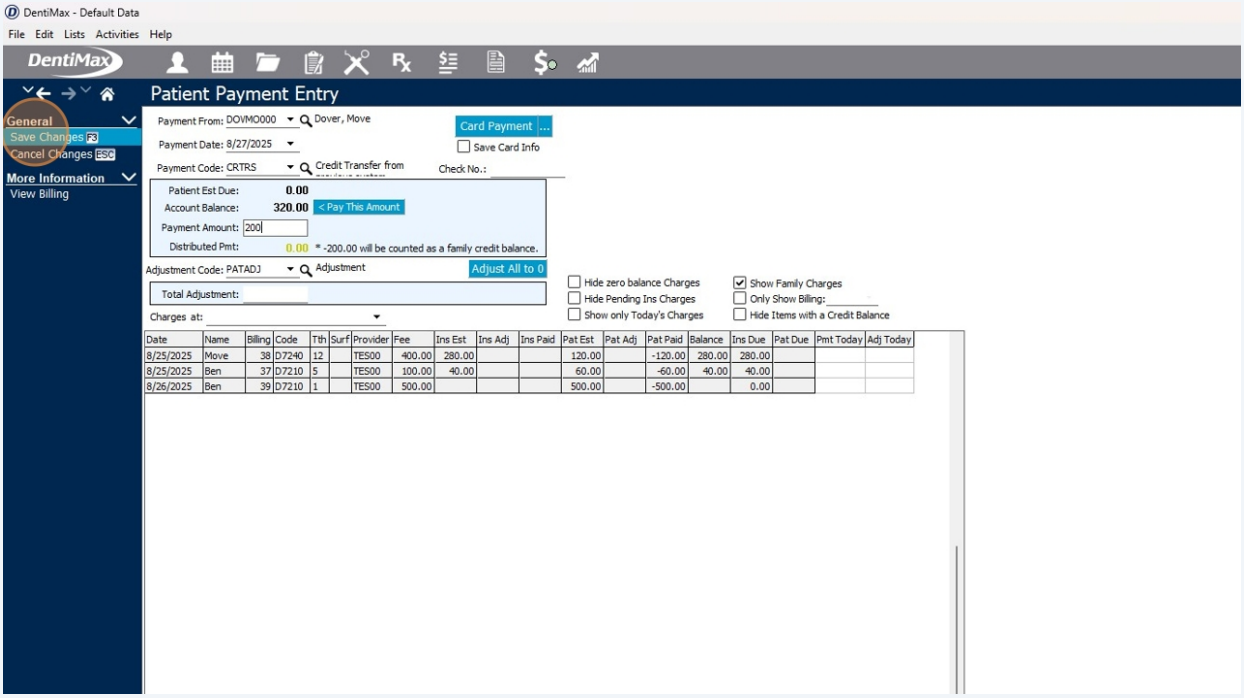
14 Enter code or select from the drop-down menu



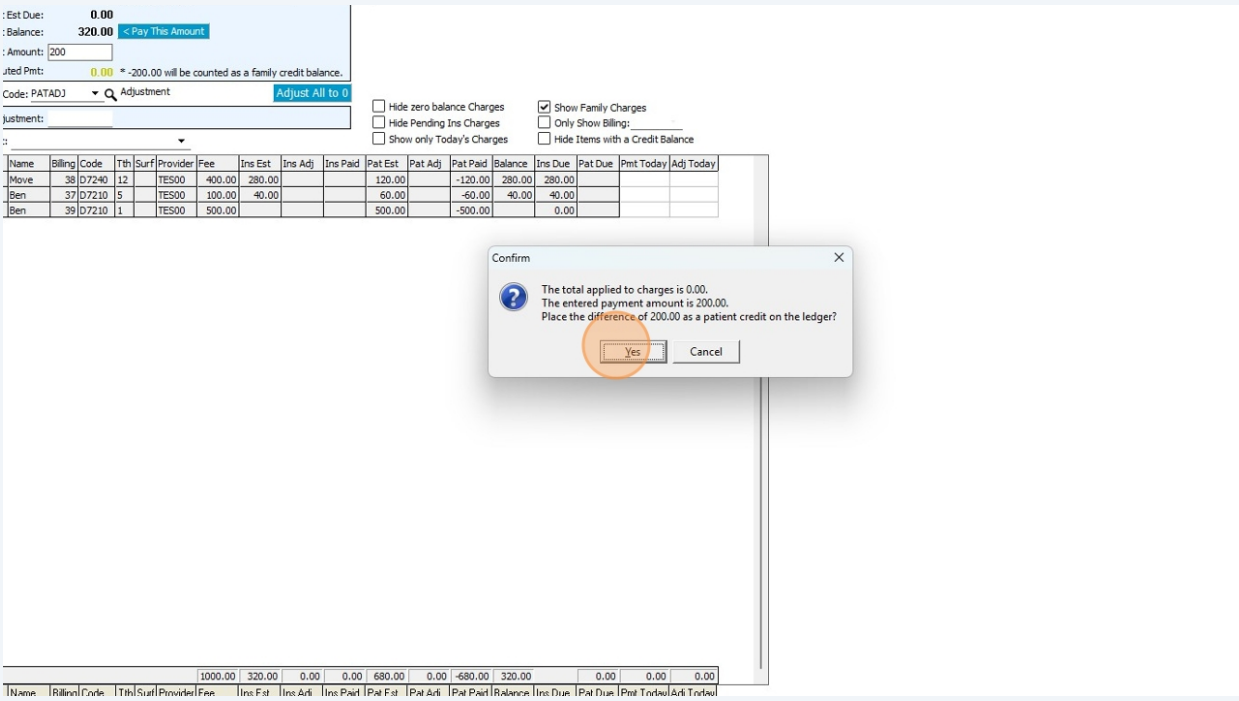
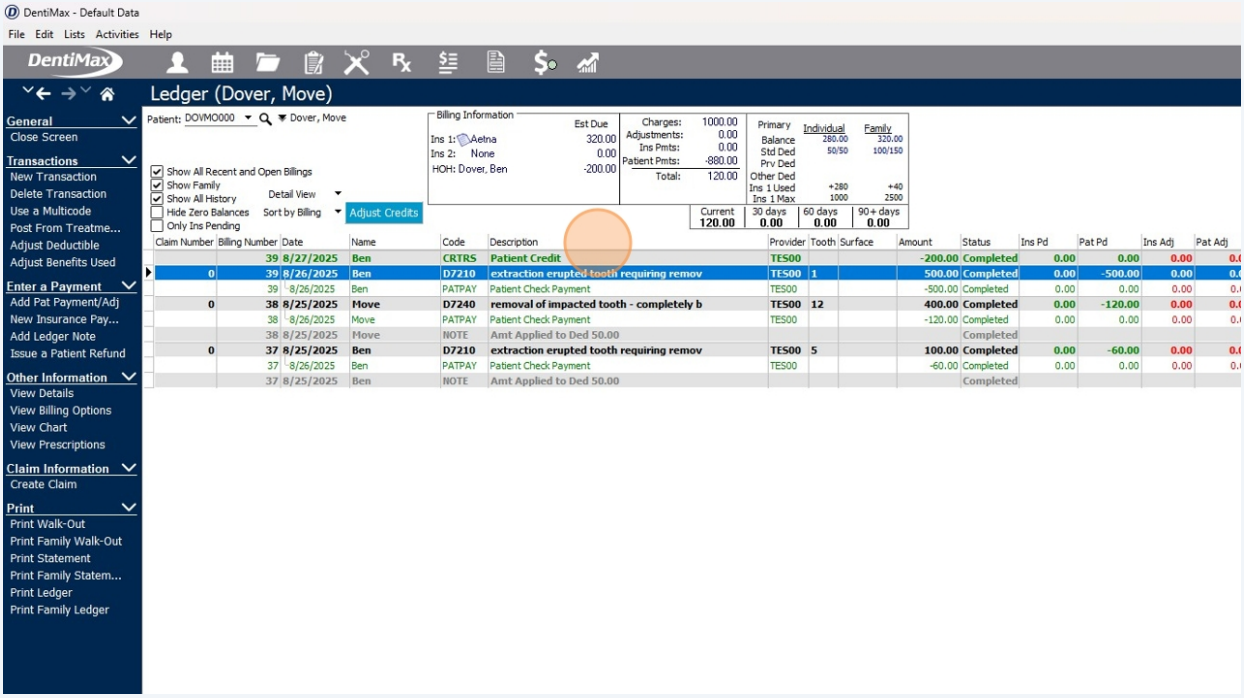
15 Enter the Credit amount in the Payment Amount box



16 Confirm that this "payment" is not applied to transactions below and save changes



17 Confirm that you want this to be placed as a credit: click Yes



18 This credit will appear on the patient's ledger as a