

Posting Charges from Appointments

1

When scheduling appointments be sure to add procedures scheduled to the appointment. These scheduled procedures will be listed on the appointment if your system is set up to show information on the appointment. Or you can Double-click to open appointment to verify procedures have been added.

The screenshot displays a dental scheduling software interface for Monday, August 4, 2025. The interface includes a calendar view on the left, a sidebar menu, and a main grid of appointment slots. The grid is divided into three columns: 'consults', 'restorative', and 'Surgery'. A pop-up window for an appointment titled 'Sunny Test' is open, showing patient information and procedures. The sidebar menu includes options like 'General', 'Manage Appts', 'Create Appts', 'Patient Information', 'Print', and 'Check Eligibility'. The appointment details for 'Sunny Test' include a mobile phone number (988-8888), a location (14/Aetna), and procedures (OralHygIn, 4BWx, ProphyAd, Bal:50.00, needs before school).

2

Procedures scheduled should be listed here for all appointments; this allows for ease of posting treatment

The screenshot shows a dental appointment entry form. On the left is a dark blue sidebar with menu items: General, Modify Data, Service Codes, More Information, and Insurance Info. The main form area contains patient information (Patient: TESSH000, Test, Sunny), appointment details (Date: 8/4/2025, Time: 11:00 AM), and a table of service codes. A red circle highlights the 'Eligibility Not Checked' link in the 'Eligibility' column of the service codes table. Below the table, the appointment total is 0.00 and the account balance is 50.00.

Account Code	Description	Tooth	Surface	Fee	Eligibility
D1110	prophylaxis - adult			0.00	Eligibility Not Checked
D0274	bitewings - four radiographic ir			0.00	
D1330	oral hygiene instructions			0.00	

3

Click here

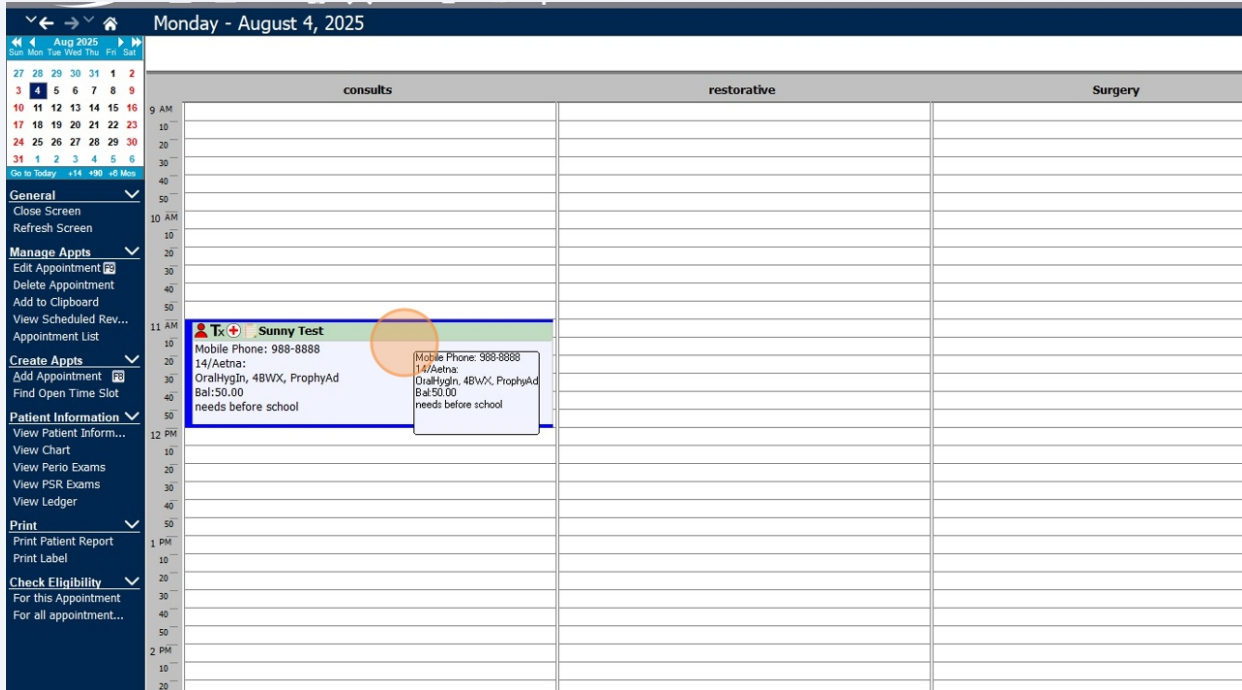
This screenshot shows the Dentimax software interface. The top bar includes the Dentimax logo and navigation icons. The main window is titled 'Appointment Entry' and contains the same patient and appointment information as the previous screenshot. A red circle highlights the 'Eligibility Not Checked' link in the service codes table. The appointment total is 0.00 and the account balance is 50.00.

Account Code	Description	Tooth	Surface	Fee	Eligibility
D1110	prophylaxis - adult			0.00	Eligibility Not Checked
D0274	bitewings - four radiographic ir			0.00	
D1330	oral hygiene instructions			0.00	

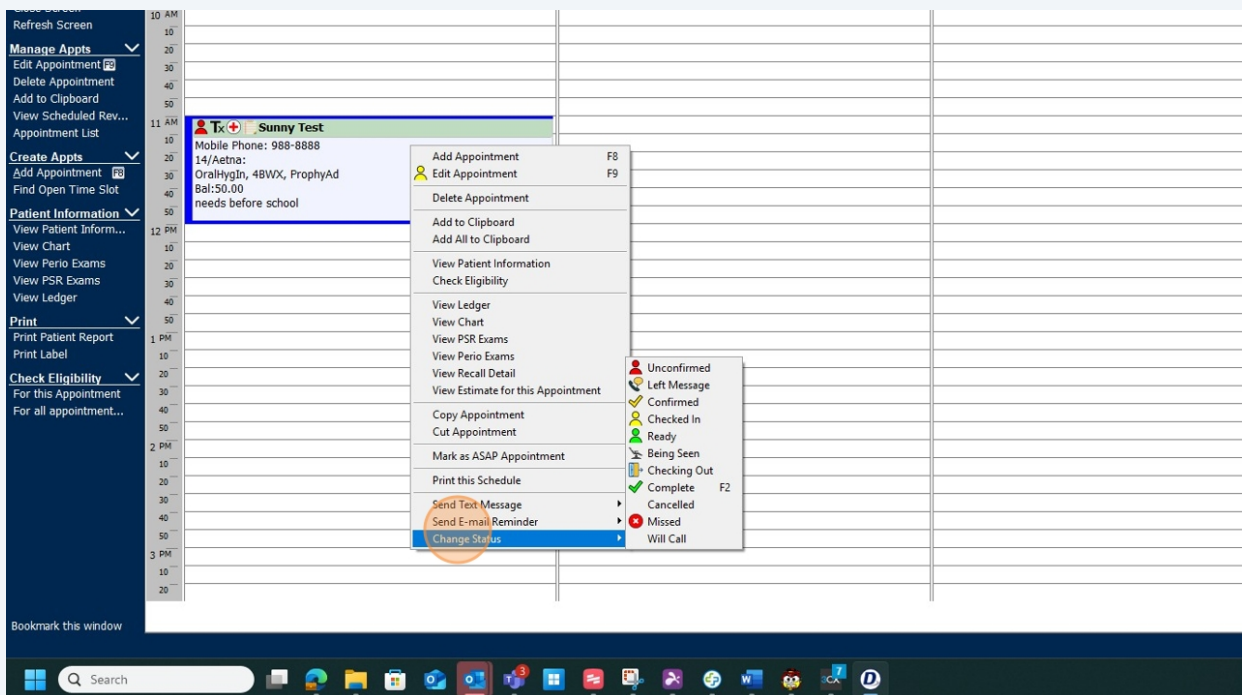
4 To POST CHARGES FROM APPOINTMENT

Select appointment; created blue halo

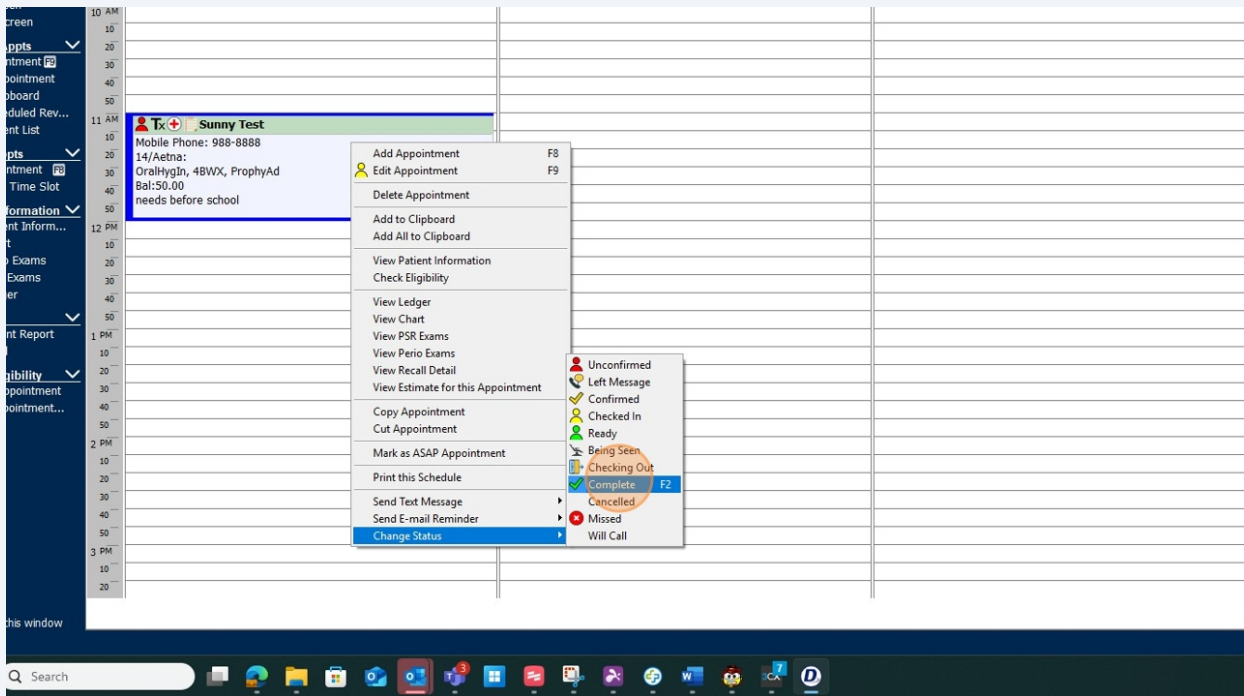
Right click on appointment



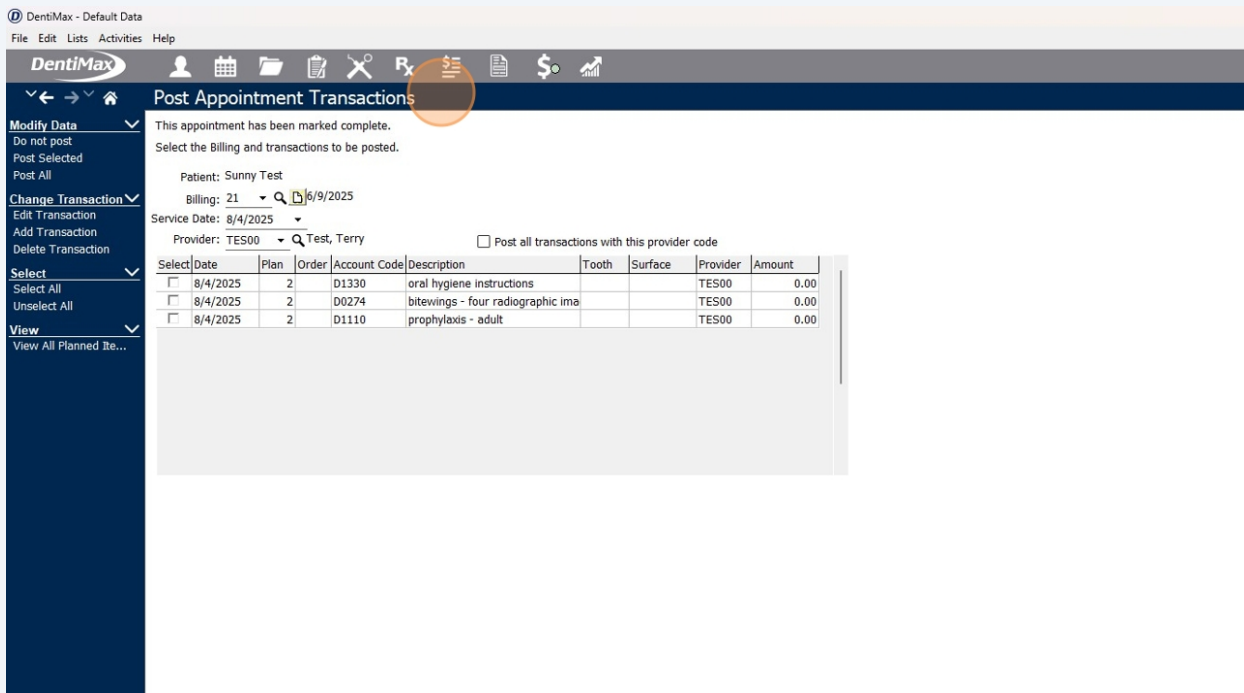
5 Select Change Status



6 Click Complete



7 This will open the Post Appointment Transactions screen



8 You have the option to Post Selected or Post All procedures

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Post Appointment Transactions

Modify Data This appointment has been marked complete.
Select the Billing and transactions to be posted.

Patient: Sunny Test
Billing: 21 8/6/9/2025
Service Date: 8/4/2025
Provider: TES00 Test, Terry Post all transactions with this provider code

Select	Date	Plan	Order	Account Code	Description	Tooth	Surface	Provider	Amount
<input checked="" type="checkbox"/>	8/4/2025	2		01330	oral hygiene instructions			TES00	0.00
<input type="checkbox"/>	8/4/2025	2		D0274	bitewings - four radiographic ima			TES00	0.00
<input type="checkbox"/>	8/4/2025	2		D1110	prophylaxis - adult			TES00	0.00

Modify Data
Do not post
Post Selected
Post All
Change Transaction
Edit Transaction
Add Transaction
Delete Transaction
Select
Select All
Unselect All
View
View All Planned It...

9 If you only need to select individual procedures that are done, check each box. Then you will click POST SELECTED

If all procedures are done, click POST ALL

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Post Appointment Transactions

Modify Data This appointment has been marked complete.
Select the Billing and transactions to be posted.

Patient: Sunny Test
Billing: 21 8/6/9/2025
Service Date: 8/4/2025
Provider: TES00 Test, Terry Post all transactions with this provider code

Select	Date	Plan	Order	Account Code	Description	Tooth	Surface	Provider	Amount
<input checked="" type="checkbox"/>	8/4/2025	2		01330	oral hygiene instructions			TES00	0.00
<input type="checkbox"/>	8/4/2025	2		D0274	bitewings - four radiographic ima			TES00	0.00
<input type="checkbox"/>	8/4/2025	2		D1110	prophylaxis - adult			TES00	0.00

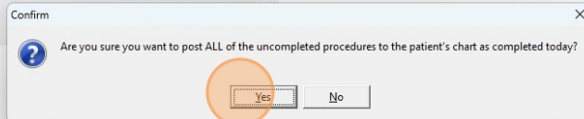
Modify Data
Do not post
Post Selected
Post All
Change Transaction
Edit Transaction
Add Transaction
Delete Transaction
Select
Select All
Unselect All
View
View All Planned It...

10 Click "Yes"

Filtering: 21 | 6/9/2025
 Date: 8/4/2025
 Provider: TES00 | Test, Terry

Post all transactions with this provider code

Date	Plan	Order	Account Code	Description	Tooth	Surface	Provider	Amount
8/4/2025		2	D1330	oral hygiene instructions			TES00	0.00
8/4/2025		2	D0274	bitewings - four radiographic ima			TES00	0.00
8/4/2025		2	D1110	prophylaxis - adult			TES00	0.00



11 You will see all charges selected are now on the ledger as COMPLETED items

tiMax Ledger (Test, Sunny)

Patient: TESSH000 | Test, Sunny

Billing Information: Est Due 100.00, Charges 1400.00, Adjustments -750.00, Ins 1: Aetna, Ins 2: None, HOH: Test, Sunny

Claim Number	Billing Number	Date	Name	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal
0	21	8/4/2025	Sunny	D1330	oral hygiene instructions	TES00			0.00	Completed	0.00	0.00	0.00	0.00	0.00
0	21	8/4/2025	Sunny	D0274	bitewings - four radiographic images	TES00			0.00	Completed	0.00	0.00	0.00	0.00	0.00
0	21	8/4/2025	Sunny	D1110	prophylaxis - adult	TES00			0.00	Completed	0.00	0.00	0.00	0.00	0.00
0	21	7/10/2025	Sunny	D2391	resin-based composite - one surface post	TES00	30	B	0.00	Completed	0.00	0.00	0.00	0.00	0.00
0	21	7/10/2025	Sunny	D1110	prophylaxis - adult	TES00			0.00	Completed	0.00	0.00	0.00	0.00	0.00
0	21	7/10/2025	Sunny	D0120	periodic oral evaluation - established p	TES00			50.00	Completed	0.00	0.00	0.00	0.00	50.00
0	21	7/10/2025	Sunny	D0274	bitewings - four radiographic images	TES00			0.00	Completed	0.00	0.00	0.00	0.00	0.00
0	21	7/10/2025	Sunny	D1330	oral hygiene instructions	TES00			0.00	Completed	0.00	0.00	0.00	0.00	0.00
44	21	6/9/2025	Sunny			TES00			0.00	Completed	0.00	0.00	0.00	0.00	0.00
43	15	5/7/2025	Sunny	D2394	resin-based composite - four or more sur	TES00	29	MODB	1000.00	Completed	-150.00	-200.00	-650.00	0.00	0.00
	15	5/7/2025	Sunny	INSADJ	Insurance Adjustment	TES00			-650.00	Completed	0.00	0.00	0.00	0.00	0.00
	15	5/12/2025	Sunny	PATCASH	Patient Cash Payment	TES00			-200.00	Completed	0.00	0.00	0.00	0.00	0.00
	15	7/9/2025	Sunny	INSCHECK	Insurance Check Payment	TES00			-150.00	Completed	0.00	0.00	0.00	0.00	0.00
26	15	5/7/2025	Sunny	CLAIM	Primary insurance claim printed	TES00			0.00	Completed	0.00	0.00	0.00	0.00	0.00
43	15	5/7/2025	Sunny	D0330	panoramic radiographic image	TES00			300.00	Completed	-150.00	-50.00	-100.00	0.00	0.00
	15	5/7/2025	Sunny	INSADJ	Insurance Adjustment	TES00			-100.00	Completed	0.00	0.00	0.00	0.00	0.00
	15	5/12/2025	Sunny	PATCASH	Patient Cash Payment	TES00			-50.00	Completed	0.00	0.00	0.00	0.00	0.00
	15	7/7/2025	Sunny	INSCHECK	Insurance Check Payment	TES00			-100.00	Completed	0.00	0.00	0.00	0.00	0.00
	15	7/9/2025	Sunny	INSCHECK	Insurance Check Payment	TES00			-50.00	Completed	0.00	0.00	0.00	0.00	0.00
43	15	5/7/2025	Sunny	D0120	periodic oral evaluation - established p	TES00			50.00	Completed	0.00	-50.00	0.00	0.00	0.00
	15	5/12/2025	Sunny	PATCASH	Patient Cash Payment	TES00			-50.00	Completed	0.00	0.00	0.00	0.00	0.00
27	15	5/7/2025	Sunny	CLAIM	Primary insurance claim printed	TES00			0.00	Completed	0.00	0.00	0.00	0.00	0.00
	15	5/7/2025	Sunny	NOTE	Amt. Applied to Ded 50.00	TES00			0.00	Completed	0.00	0.00	0.00	0.00	0.00

12 If patient has insurance; proceed to CREATE CLAIMS

If patient does not have insurance, you can collect any patient balance due; proceed to POSTING PAYMENTS if needed

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Ledger (Test, Sunny)

Patient: TESSH000 Test, Sunny

Billing Information
 Est Due: 240.00
 Charges: 1540.00
 Adjustments: -750.00
 Ins 1: Aetna
 Ins 2: None
 HOH: Test, Sunny
 Patient Pmts: -300.00
 Total: 190.00

Primary Balance: 190.00
 Individual: 190.00
 Family: 190.00
 Std Ded: 0/150
 Piv Ded: 0/150
 Other Ded: 300+240
 Ins 1 Used: 1000
 Ins 1 Max: 2500

Claim Number	Billing Number	Date	Name	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj
59	21 8/4/2025	Sunny	D1330	oral hygiene instructions	TES00				10.00	Completed	0.00	0.00	0.00	0.0
59	21 8/4/2025	Sunny	D0274	bitewings - four radiographic images	TES00				30.00	Completed	0.00	0.00	0.00	0.0
59	21 8/4/2025	Sunny	D1110	prophylaxis - adult	TES00				108.00	Completed	0.00	0.00	0.00	0.0
59	21 7/10/2025	Sunny	D2391	resin-based composite - one surface post	TES00	30	B		0.00	Completed	0.00	0.00	0.00	0.0
59	21 7/10/2025	Sunny	D1110	prophylaxis - adult	TES00				0.00	Completed	0.00	0.00	0.00	0.0
59	21 7/10/2025	Sunny	D0120	periodic oral evaluation - established p	TES00				50.00	Completed	0.00	0.00	0.00	0.0
59	21 7/10/2025	Sunny	D0274	bitewings - four radiographic images	TES00				0.00	Completed	0.00	0.00	0.00	0.0
59	21 7/10/2025	Sunny	D1330	oral hygiene instructions	TES00				0.00	Completed	0.00	0.00	0.00	0.0
44	21 6/9/2025	Sunny			TES00				0.00	Completed	0.00	0.00	0.00	0.0
43	15 5/7/2025	Sunny	D2394	resin-based composite - four or more sur	TES00	29	MODB		1000.00	Completed	-150.00	-200.00	-650.00	0.0
	15 -5/7/2025	Sunny	INSADJ	Insurance Adjustment	TES00				-650.00	Completed	0.00	0.00	0.00	0.0
	15 -5/12/2025	Sunny	PATCASH	Patent Cash Payment	TES00				-200.00	Completed	0.00	0.00	0.00	0.0
	15 -7/9/2025	Sunny	INSCHECK	Insurance Check Payment	TES00				-150.00	Completed	0.00	0.00	0.00	0.0
26	15 5/7/2025	Sunny	CLAIM	Primary insurance claim printed					0.00	Completed	0.00	0.00	0.00	0.0
43	15 5/7/2025	Sunny	D0330	panoramic radiographic image	TES00				300.00	Completed	-150.00	-50.00	-100.00	0.0
	15 -5/7/2025	Sunny	INSADJ	Insurance Adjustment	TES00				-100.00	Completed	0.00	0.00	0.00	0.0
	15 -5/12/2025	Sunny	PATCASH	Patent Cash Payment	TES00				-50.00	Completed	0.00	0.00	0.00	0.0
	15 -7/7/2025	Sunny	INSCHECK	Insurance Check Payment	TES00				-100.00	Completed	0.00	0.00	0.00	0.0
	15 -7/9/2025	Sunny	INSCHECK	Insurance Check Payment	TES00				-50.00	Completed	0.00	0.00	0.00	0.0
43	15 5/7/2025	Sunny	D0120	periodic oral evaluation - established p	TES00				50.00	Completed	0.00	-50.00	0.00	0.0
	15 -5/12/2025	Sunny	PATCASH	Patent Cash Payment	TES00				-50.00	Completed	0.00	0.00	0.00	0.0
27	15 5/7/2025	Sunny	CLAIM	Primary insurance claim printed					0.00	Completed	0.00	0.00	0.00	0.0
	15 5/7/2025	Sunny	NOTE	Amt Applied to Ded 50.00						Completed				

13

Back on the schedule; you will now see the appointment has a green check mark and is grayed out, showing it is a completed appointment.

The screenshot displays a scheduling interface for Monday, August 4, 2025. The interface is divided into three columns: 'consults', 'restorative', and 'Surgery'. The time slots range from 9 AM to 5 PM. A completed appointment is shown in the 'consults' column at 11 AM. The appointment is titled 'Sunny Test' and is marked with a green checkmark and a red cross icon. The appointment details are displayed in a grayed-out box, indicating it is completed. The details include: Mobile Phone: 988-8888, 14/Aetna, OralHygin, 4BWV, ProphyAd, Bal:190.00, and needs before school. A blue bar highlights the 11 AM time slot. A navigation menu on the left side of the screen includes options such as 'General', 'Manage Appts', 'Create Appts', 'Print', and 'Check Eligibility'.