

DentiMax: Posting patient Pre-Payment



1 Click to Add Pat Payment

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Ledger (Dover, Move)

Patient: **D0W0000** | Dover, Move

Billing Information		Est Due	Charges:	400.00	Primary	Individual	Family
Ins 1:	Aetna	0.00	Adjustments:	0.00	Balance	0.00	-660.00
Ins 2:	None	0.00	Ins Pmts:	-280.00	Std Ded	50/50	100/150
HOH:	Dover, Ben	0.00	Patient Pmts:	-120.00	Prv Ded		
			Total:	0.00	Other Ded		
					Ins 1 Used	280	
					Ins 1 Max	1000	2500
			Current	0.00	30 days	0.00	90+ days
						0.00	

Claim Number	Billing Number	Date	Name	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj
0	38	8/25/2025	Move	07240	removal of impacted tooth - completely b	TES00	12		400.00	Completed	-280.00	-120.00	0.00	0.00
	38	8/26/2025	Move	PATPAY	Patient Check Payment	TES00			-120.00	Completed	0.00	0.00	0.00	0.00
	38	8/27/2025	Move	INSCHOC	Insurance Check Payment	TES00			-280.00	Completed	0.00	0.00	0.00	0.00
		38	8/25/2025	Move	NOTE	Amt Applied to Ded 50.00				Completed				

2 Select payment type from the drop-down menu

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Patient Payment Entry

Payment From: 00VMO000 Dover, Move Card Payment
 Payment Date: 9/2/2025 Save Card Info

Payment Code: **CRTS** credit trans Save Card Info

Check No.:

Hide zero balance Charges Show Family Charges
 Hide Pending Ins Charges Only Show Billing:
 Show only Today's Charges Hide Items with a Credit Balance

Date	Name	Billing	Code	Tth	Surf	Provider	Fee	Ins Est	Ins Adj	Ins Paid	Pat Est	Pat Adj	Pat Paid	Balance	Ins Due	Pat Due	Pmt Today	Adj Today
8/25/2025	Move	38	07240	12		TES00	400.00	280.00		-280.00	120.00		-120.00		0.00			
8/25/2025	Ben	37	07210	5		TES00	100.00	100.00		-100.00	60.00		-60.00		0.00			
8/26/2025	Ben	39	07210	1		TES00	500.00	600.00		-600.00	-100.00		-500.00		0.00			
8/28/2025	Ben	37	ALTOP4					-60.00			-60.00			-60.00	0.00	-60.00		
8/28/2025	Ben	39	ALTOP4					-600.00			-600.00			-600.00	0.00	-600.00		
9/2/2025	Move	41	07240	1		TES00	200.00	160.00			40.00		-200.00		160.00			-160.00

3 Enter payment amount

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Patient Payment Entry

Payment From: DOVMO000 Dover, Move Card Payment ...
 Payment Date: 9/2/2025 Save Card Info
 Payment Code: PATCASH Patient Cash Payment Check No.:
 Patient Est Due: 0.00
 Account Balance: 0.00
 Payment Amount: 200
 Distributed Pmt: 0.00 *-200.00 will be counted as a family credit balance.
 Adjustment Code: PATADJ Adjustment Adjust All to 0
 Total Adjustment:

Charges at:

Hide zero balance Charges Show Family Charges
 Hide Pending Ins Charges Only Show Billing:
 Show only Today's Charges Hide Items with a Credit Balance

Date	Name	Billing	Code	Tth	Surf	Provider	Fee	Ins Est	Ins Adj	Ins Paid	Pat Est	Pat Adj	Pat Paid	Balance	Ins Due	Pat Due	Pmt Today	Adj Today
8/25/2025	Move	38	D7240	12		TES00	400.00	280.00		-280.00	120.00		-120.00		0.00			
8/25/2025	Ben	37	D7210	5		TES00	100.00	100.00		-100.00		60.00	-60.00		0.00			
8/26/2025	Ben	39	D7210	1		TES00	500.00	600.00		-600.00	-100.00	600.00	-500.00		0.00			
8/28/2025	Ben	37	AUTOP4				-60.00				-60.00			-60.00	0.00	-60.00		
8/28/2025	Ben	39	AUTOP4				-600.00				-600.00			-600.00	0.00	-600.00		
9/2/2025	Move	41	D7240	1		TES00	200.00	160.00			40.00		-200.00		160.00	-160.00		

4

On the lower left corner: Click "Post Money as a pre-payment to be distributed at a later time."

This will allow you to post the payment without applying it to procedures on the ledger

The screenshot shows the 'Patient Payment Entry' window in DentiMax. At the top, there are checkboxes for 'Hide zero balance Charges', 'Hide Pending Ins Charges', 'Show only Today's Charges', 'Show Family Charges', 'Only Show Billing', and 'Hide Items with a Credit Balance'. Below these is a table with columns: Date, Name, Billing Code, Tth, Surf, Provider, Fee, Ins Est, Ins Adj, Ins Paid, Pat Est, Pat Adj, Pat Paid, Balance, Ins Due, Pat Due, Pmt Today, Adj Today. The table contains several rows of data, including entries for 'Move' and 'Ben' on various dates in 2025. At the bottom left, there is a checkbox labeled 'Post Money as a pre-payment to be distributed at a later time.' which is highlighted with an orange circle. Other options at the bottom include 'Bookmark this window' and 'Default to the Ledger Selection'.

5

Save Changes

The screenshot shows the 'Patient Payment Entry' window in DentiMax. The 'General' section is expanded, showing fields for 'Payment From: DOVM0000', 'Payment Date: 9/2/2025', and 'Payment Code: CRTR'. Below this, there are summary fields for 'Patient Est Due: 0.00', 'Account Balance: 0.00', and 'Payment Amount: 200.00'. The 'Adjustment Code: PATADJ' is also visible. At the bottom left, the 'Save Changes' button is highlighted with an orange circle. The same ledger table from the previous screenshot is visible at the bottom of the window.

6 Click "Yes"

Est Due: 0.00
Balance: 0.00
Amount: 200.00
Entered Pmt: 0.00 *-200.00 will be counted as a family credit balance.
Code: PATADJ Adjustment Adjust All to 0

Adjustment: Hide zero balance Charges Show Family Charges
 Hide Pending Ins Charges Only Show Billing:
 Show only Today's Charges Hide Items with a Credit Balance

Name	Billing	Code	Th	Surf	Provider	Fee	Ins Est	Ins Adj	Ins Paid	Pat Est	Pat Adj	Pat Paid	Balance	Ins Due	Pat Due	Pmt Today	Adj Today
Move	38	D7240	12		TES00	400.00	280.00		-280.00	120.00		-120.00		0.00			
Ben	37	D7210	5		TES00	100.00	100.00		-100.00		60.00	-60.00		0.00			
Ben	39	D7210	1		TES00	500.00	600.00		-600.00		600.00	-500.00		0.00			
Ben	37	AUTOP				-60.00						-60.00	-60.00	0.00	-60.00		
Ben	39	AUTOP				-600.00						-600.00	-600.00	0.00	-600.00		

Confirm
 The total applied to charges is 0.00.
 The entered payment amount is 200.00.
 Place the difference of 200.00 as a patient credit on the ledger?

7 You will now have a pink box in the top section of the ledger with the pre-payment listed

This amount will be used to apply to procedures at a later date

DentiMax - Default Data
 File Edit Lists Activities Help

DentiMax

← → Ledger (Dover, Move)

Patient: **D0VW0000** Dover, Move

Billing Information
 Est Due: 0.00
 Charges: 400.00
 Adjustments: 0.00
 Ins Pmts: -280.00
 Patient Pmts: -120.00
 Total: 0.00

Primary Individual Family
 Balance: 0.00 660.00
 Std Ded: 50/50 100/150
 Prv Ded:
 Other Ded:
 Ins 1 Used: 280
 Ins 1 Max: 3000 2500

Family has prepayment of \$200.00
 Current: 0.00 30 days: 0.00 60 days: 0.00 90+ days: 0.00

Claim Number	Billing Number	Date	Name	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj
0	38	8/25/2025	Move	D7240	removal of impacted tooth - completely b	TES00	12		400.00	Completed	-280.00	-120.00	0.00	0.00
	38	8/26/2025	Move	PATPAY	Patient Check Payment	TES00			-120.00	Completed	0.00	0.00	0.00	0.00
	38	8/27/2025	Move	INSCHECK	Insurance Check Payment	TES00			-280.00	Completed	0.00	0.00	0.00	0.00
	38	8/25/2025	Move	NOTE	Amnt Applied to Ded 50.00					Completed				

8

How to apply the pre-payment amount to procedures

Add transactions to the ledger once completed by clicking New Transaction, or post treatment from completed appointment

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Ledger (Dover, Move)

Patient: **D0W10000** | Dover, Move

Billing Information		Est Due	Charges:	400.00	Primary	Individual	Family
Ins 1:	Aetna	0.00	Adjustments:	0.00	Balance	0.00	-660.00
Ins 2:	None	0.00	Ins Pmts:	-280.00	Std Ded	50/50	100/150
HOH:	Dover, Ben	0.00	Patient Pmts:	-120.00	Priv Ded		
			Total:	0.00	Other Ded		
					Ins 1 Used	280	
					Ins 1 Max	1000	2500

Family has prepayment of: **\$200.00**

Claim Number	Billing Number	Date	Name	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj
0	38	8/25/2025	Move	07240	removal of impacted tooth - completely b	TES00	12		400.00	Completed	-280.00	-120.00	0.00	0.00
	38	8/25/2025	Move	PATPAY	Patient Check Payment	TES00			-120.00	Completed	0.00	0.00	0.00	0.00
	38	8/27/2025	Move	INSCHEC	Insurance Check Payment	TES00			-280.00	Completed	0.00	0.00	0.00	0.00
		38	8/25/2025	Move	NOTE	Amt Applied to Ded 50.00				Completed				

9

With procedures on the ledger to apply the pre-payment to: Click on the \$ amount in the pink box

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Ledger (Dover, Move)

Patient: DOVMO000 Dover, Move

Billing Information

Charges:	600.00	Primary	Individual	Family
Adjustments:	0.00	Balance	200.00	460.00
Ins 1: Aetna	160.00	Std Ded	50/50	100/150
Ins 2: None	0.00	Prv Ded		
HOH: Dover, Ben	40.00	Other Ded		
Total:	200.00	Ins 1 Used	280+160	+700
		Ins 1 Max	1000	2500

Family has prepayment of: **\$200.00** Current: 200.00 30 days: 0.00 60 days: 0.00 90+ days: 0.00

Claim Number	Billing Number	Date	Name	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj
0	41	9/2/2025	Move	D7240	removal of impacted tooth - completely b	TES00	1		200.00	Completed	0.00	0.00	0.00	0.0
0	38	8/25/2025	Move	D7240	removal of impacted tooth - completely b	TES00	12		400.00	Completed	-280.00	-120.00	0.00	0.0
	38	8/26/2025	Move	PATPAY	Patient Check Payment	TES00			-120.00	Completed	0.00	0.00	0.00	0.0
	38	8/27/2025	Move	INSCHEC	Insurance Check Payment	TES00			-280.00	Completed	0.00	0.00	0.00	0.0
		38	8/25/2025	Move	NOTE					Completed				

10

In the payment entry; click Distribute

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Batch Payment Entry

ID: 76

Date: 9/2/2025

Type: Patient

Patient: DOVMO000 Dover, Move

Payment Method: Check Check Number: _____

Description: credit trans

Original Amount: 200.00

Distributed Total: 0.00

Unused Amount: 200.00

Payment Detail

Date	Name	Code	Description	Amount Paid

11

Select the procedure(s) you would like to apply the pre-payment to. Enter the amount in the Pmt Today box

Payment Entry

MO000 Q Dover, Move Card Payment ...

2025 Save Card Info

R credit trans Check No.:

0.00
0.00

200.00 0.00 of 200.00 was previously posted.

48.00 *-160.00 will be counted as a family credit balance.

ADJ Adjustment Adjust All to 0

Hide zero balance Charges Show Family Charges
 Hide Pending Ins Charges Only Show Billing:
 Show only Today's Charges Hide Items with a Credit Balance

Billing Code	Tth	Surf	Provider	Fee	Ins Est	Ins Adj	Ins Paid	Pat Est	Pat Adj	Pat Paid	Balance	Ins Due	Pat Due	Pmt Today	Adj Today
38 D7240	12		TES00	400.00	280.00		-280.00	120.00		-120.00		0.00			
37 D7210	5		TES00	100.00	100.00		-100.00		60.00	-60.00		0.00			
39 D7210	1		TES00	500.00	600.00		-600.00	-100.00	600.00	-500.00		0.00			
37 AUTOP4				-60.00				-60.00		-60.00		0.00	-60.00		
39 AUTOP4				-600.00				-600.00		-600.00		0.00	-600.00		
41 D7240	1		TES00	200.00	160.00			40.00			200.00	160.00	40.00	200.00	

12

You will see that the payment amount and the Distributed amount equal

DentiMax - Default Data

File Edit Lists Activities Help

DentiMax

Patient Payment Entry

Payment From: DOVM0000 Q Dover, Move Card Payment ...

Payment Date: 9/2/2025 Save Card Info

Payment Code: CRTR credit trans Check No.:

Patient Est Due: 0.00
 Account Balance: 0.00
 Payment Amount: 200.00 0.00 of 200.00 was previously posted.
 Distributed Pmt: -200.00

Adjustment Code: PATADJ Adjustment Adjust All to 0

Total Adjustment:

Charges at:

Hide zero balance Charges Show Family Charges
 Hide Pending Ins Charges Only Show Billing:
 Show only Today's Charges Hide Items with a Credit Balance

Date	Name	Billing Code	Tth	Surf	Provider	Fee	Ins Est	Ins Adj	Ins Paid	Pat Est	Pat Adj	Pat Paid	Balance	Ins Due	Pat Due	Pmt Today	Adj Today
8/25/2025	Move	38 D7240	12		TES00	400.00	280.00		-280.00	120.00		-120.00		0.00			
8/25/2025	Ben	37 D7210	5		TES00	100.00	100.00		-100.00		60.00	-60.00		0.00			
8/26/2025	Ben	39 D7210	1		TES00	500.00	600.00		-600.00	-100.00	600.00	-500.00		0.00			
8/28/2025	Ben	37 AUTOP4				-60.00				-60.00		-60.00		0.00	-60.00		
8/28/2025	Ben	39 AUTOP4				-600.00				-600.00		-600.00		0.00	-600.00		
9/2/2025	Move	41 D7240	1		TES00	200.00	160.00			40.00		200.00	160.00	40.00	-200.00		

13 Save Changes

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Patient Payment Entry

Payment From: DOVMO000 Dover, Move Card Payment ...
 Payment Date: 9/2/2025 Save Card Info
 Payment Code: CRTR credit trans Check No.:

Patient Est Due: 0.00
 Account Balance: 0.00
 Payment Amount: 200.00 0.00 of 200.00 was previously posted.
 Distributed Pmt: -200.00

Adjustment Code: PATADJ Adjustment Adjust All to 0

Total Adjustment: _____

Hide zero balance Charges Show Family Charges
 Hide Pending Ins Charges Only Show Billing: _____
 Show only Today's Charges Hide Items with a Credit Balance

Date	Name	Billing	Code	Tth	Surf	Provider	Fee	Ins Est	Ins Adj	Ins Paid	Pat Est	Pat Adj	Pat Paid	Balance	Ins Due	Pat Due	Pmt Today	Adj Today
8/25/2025	Move	38	D7240	12		TES00	400.00	280.00		-280.00	120.00		-120.00	0.00				
8/25/2025	Ben	37	D7210	5		TES00	100.00	100.00		-100.00		60.00	-60.00	0.00				
8/26/2025	Ben	39	D7210	1		TES00	500.00	600.00		-600.00	-100.00	600.00	-500.00					
8/28/2025	Ben	37	ALT094				-60.00				-60.00			-60.00	0.00	-60.00		
8/28/2025	Ben	39	ALT094				-600.00				-600.00			-600.00	0.00	-600.00		
9/2/2025	Move	41	D7240	1		TES00	200.00	160.00			-40.00			200.00	160.00	-40.00	-200.00	

14 Close Screen

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Batch Payment Entry

ID: 76
 Date: 9/2/2025
 Type: Patient
 Patient: DOVMO000 Dover, Move
 Payment Method: Check Check Number: _____
 Description: credit trans
 Original Amount: 200.00
 Distributed Total: 200.00
 Unused Amount: 0.00

Payment Detail

Date	Name	Code	Description	Amount Paid
9/2/2025	Dover, Move	CRTR	credit trans	-200.00

15

The pink pre-payment box is gone, and the payment amount is applied to the procedure on the ledger.

DentiMax - Default Data
 File Edit Lists Activities Help

DentiMax

Ledger (Dover, Move)

Patient: **BQW0000** | Dover, Move

Billing Information		Est Due: 600.00	Charges: 600.00	Primary:	Individual:	Family:
Ins 1: Aetna	160.00	Adjustments: 0.00	Ins Pmts: -260.00	Balance: 6.00	6.00	665.00
Ins 2: None	0.00	Patient Pmts: -320.00	Total: 0.00	Std Ded: 50/50	100/150	
HOH: Dover, Ben	-160.00			Pvt Ded:		
				Other Ded:		
				Ins 1 Used:	280+160	+700
				Ins 1 Max:	1000	2500
				Current:	30 days	60 days
				0.00	0.00	90+ days
					0.00	0.00

Claim Number	Billing Number	Date	Name	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj
0	41	9/2/2025	Move	D7240	removal of impacted tooth - completely b	TES00	1		200.00	Completed	0.00	-200.00	0.00	0.0
					credit trans	TES00			-200.00	Completed	0.00	0.00	0.00	0.0
0	38	8/25/2025	Move	D7240	removal of impacted tooth - completely b	TES00	12		400.00	Completed	-280.00	-120.00	0.00	0.0
					Patient Check Payment	TES00			-120.00	Completed	0.00	0.00	0.00	0.0
					Insurance Check Payment	TES00			-280.00	Completed	0.00	0.00	0.00	0.0
					Amt Applied to Ded 50.00					Completed				

General
 Close Screen

Transactions
 New Transaction
 Delete Transaction
 Use a Multicode
 Post From Treatme...
 Adjust Deductible
 Adjust Benefits Used

Enter a Payment
 Add Pat Payment/Adj
 New Insurance Pay...
 Add Ledger Note
 Issue a Patient Refund

Other Information
 View Details
 View Billing Options
 View Chart
 View Prescriptions

Claim Information
 Create Claim

Print
 Print Walk-Out
 Print Family Walk-Out
 Print Statement
 Print Family Statem...
 Print Ledger
 Print Family Ledger

Patient
 Search for Patient
 Edit Patient
 New Patient