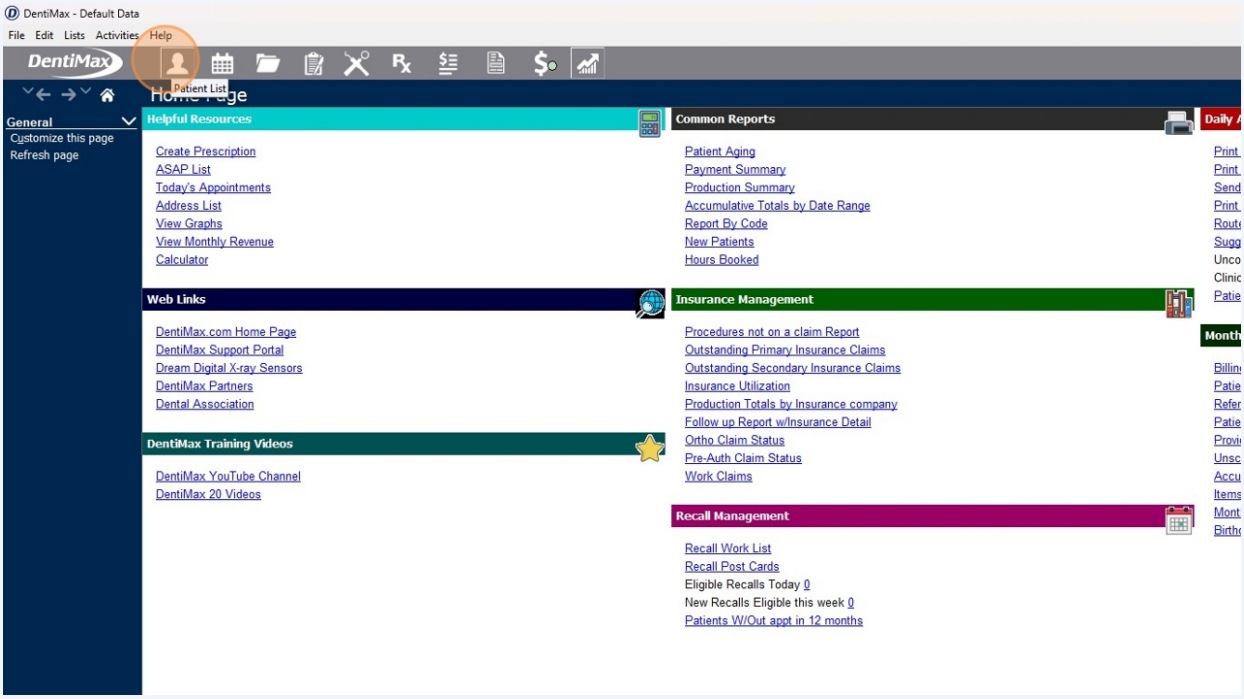
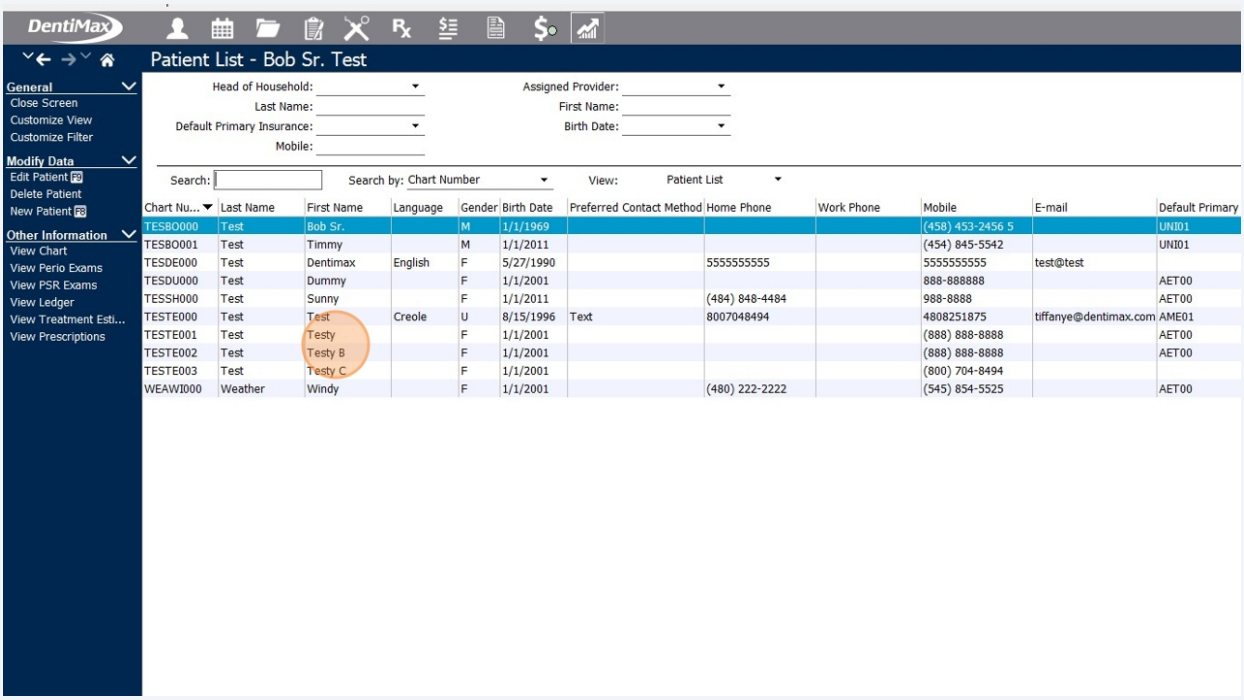
Sending Insurance Pre-Treatment Claims

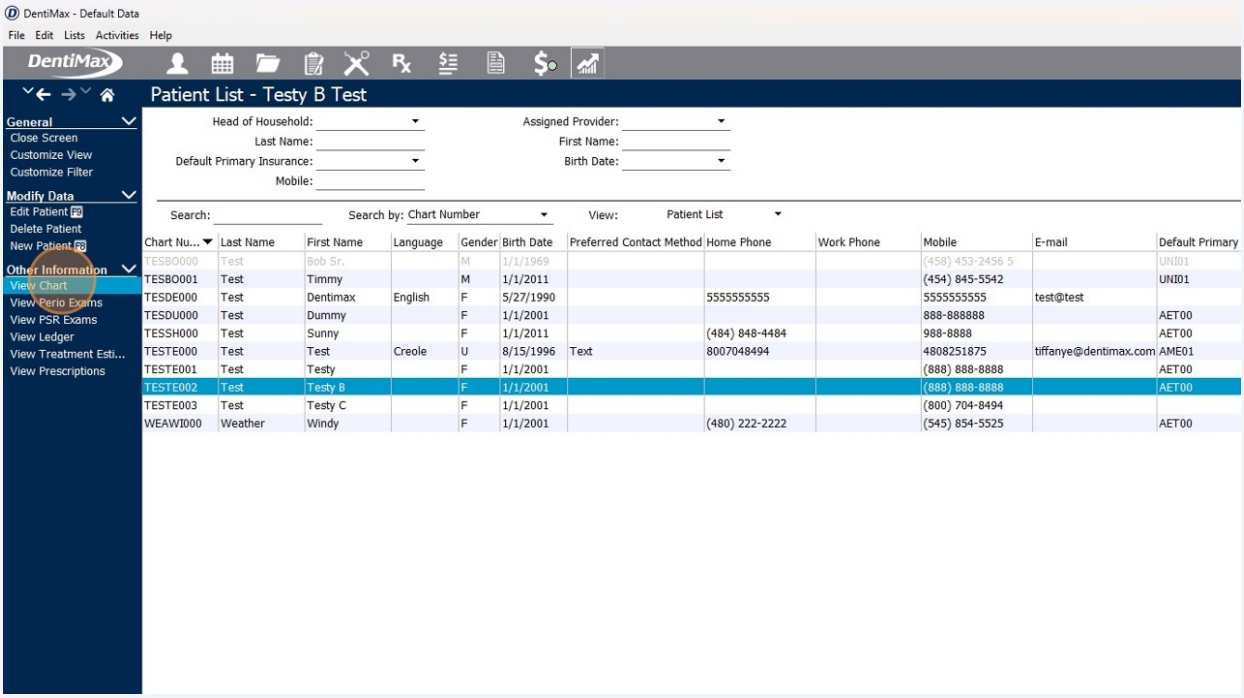
1 Open Patient List



2 Select Patient

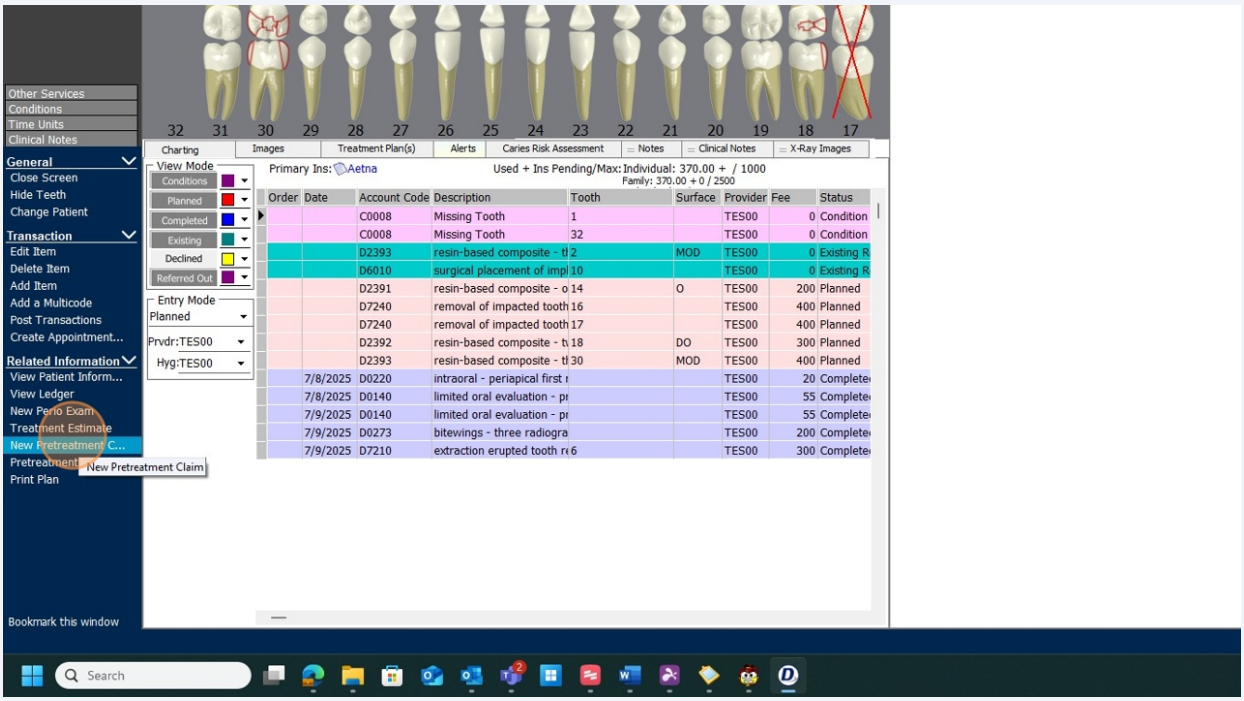


3 On the left menu, click View Chart

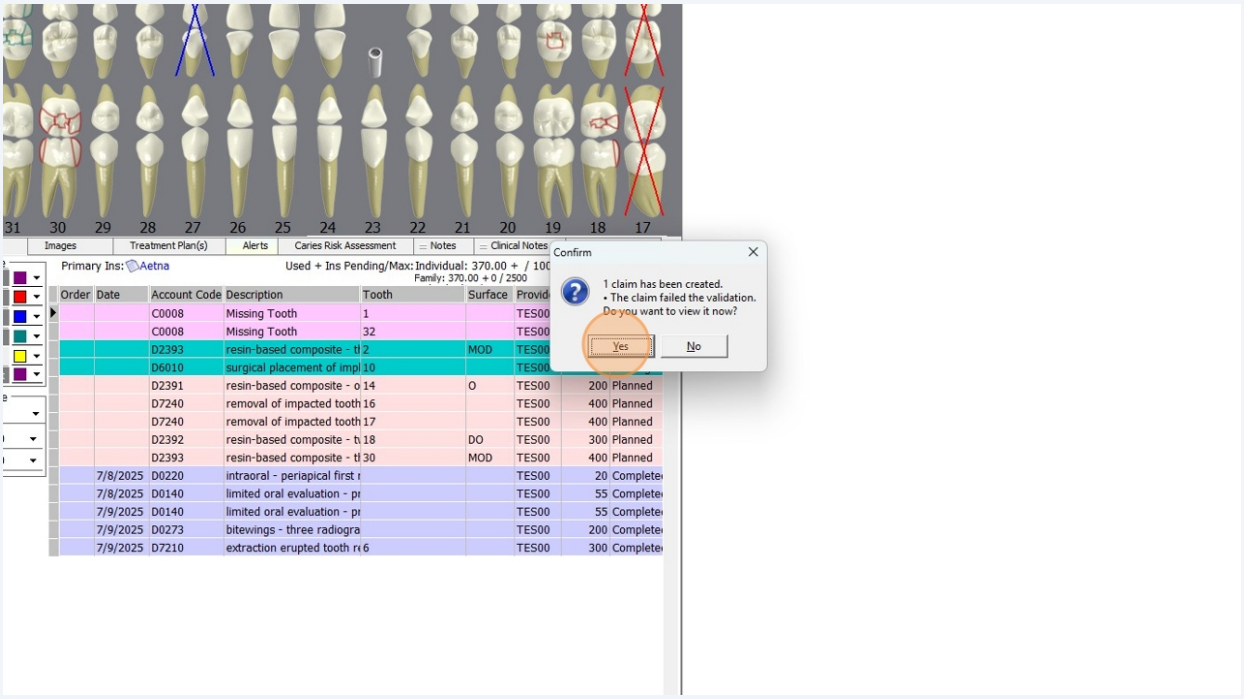


4 You will see the planned items for the selected treatment plan

On the left menu, Click New Pre-Treatment Claim

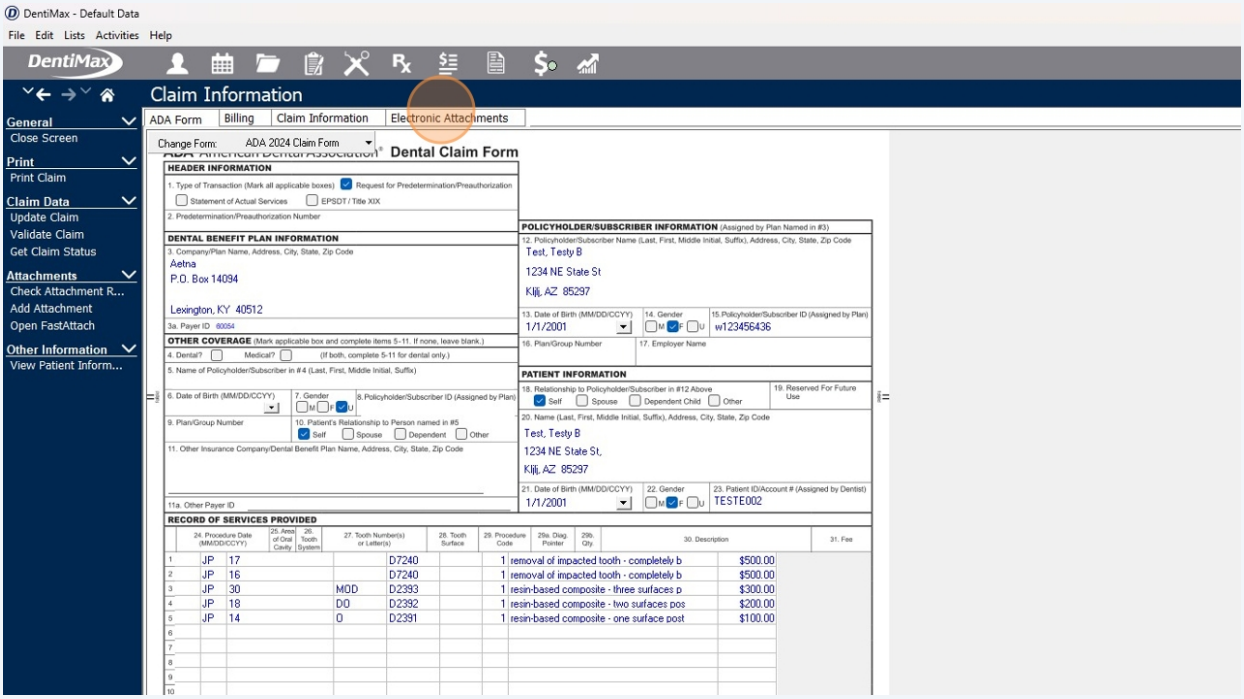


5 Pop up will say 1 claim has been created; Click Yes to view it

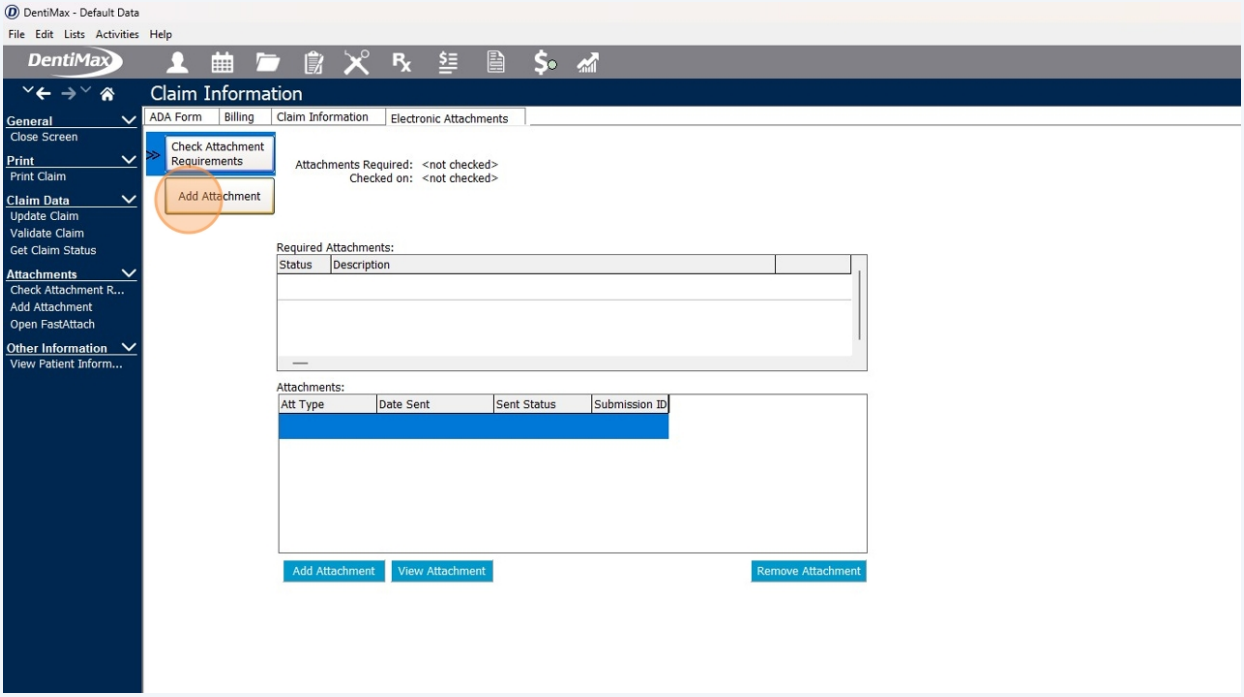


6 Verify all claim details are correct; as needed, you will do Electronic Attachments

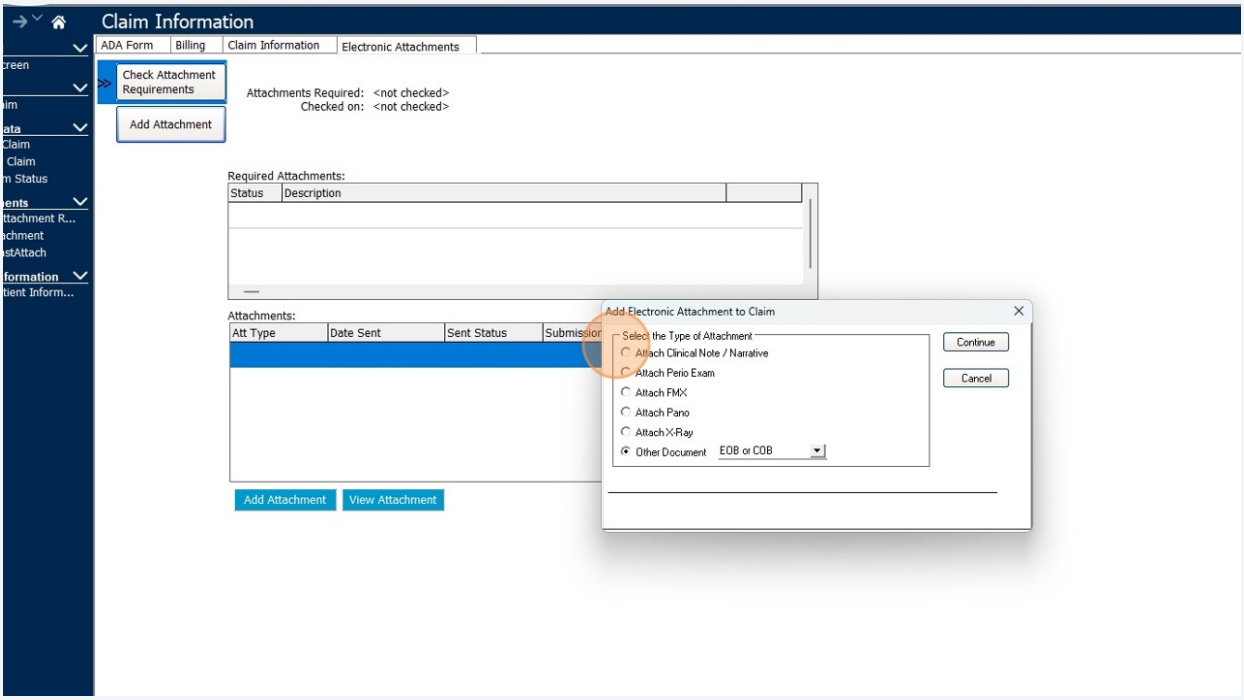
Click Electronic Attachments tab



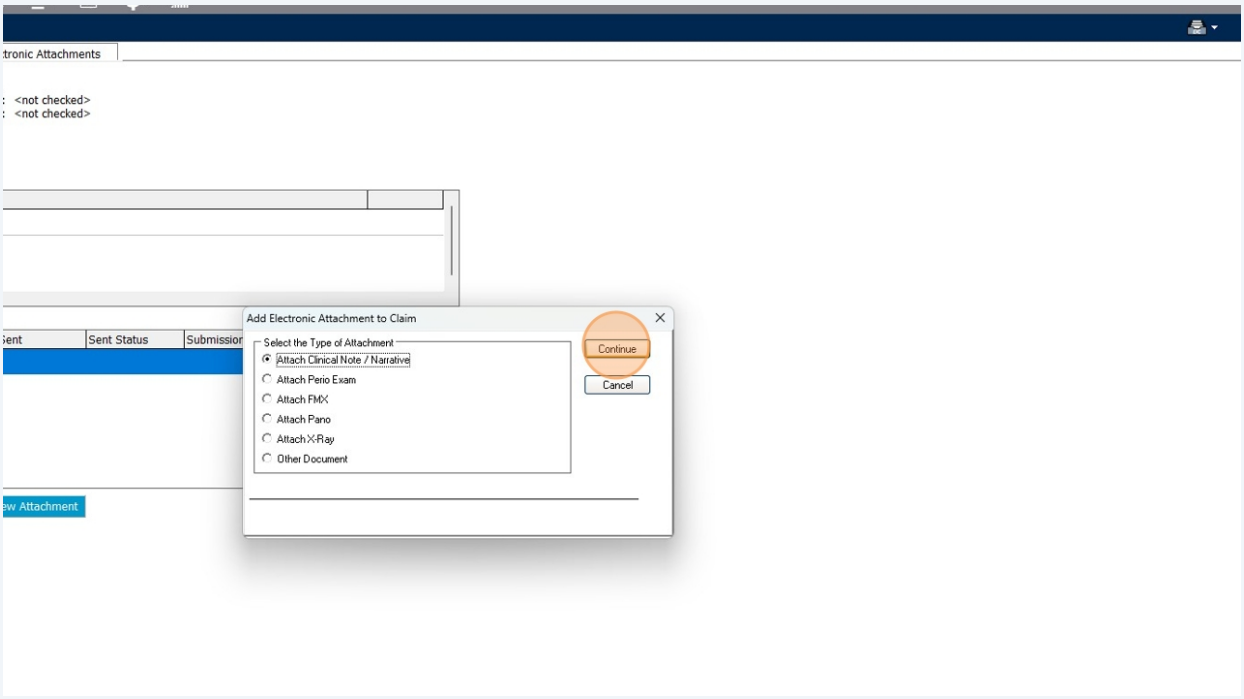
7 Click "Add Attachment"



8 Select the type of attachment you want to add

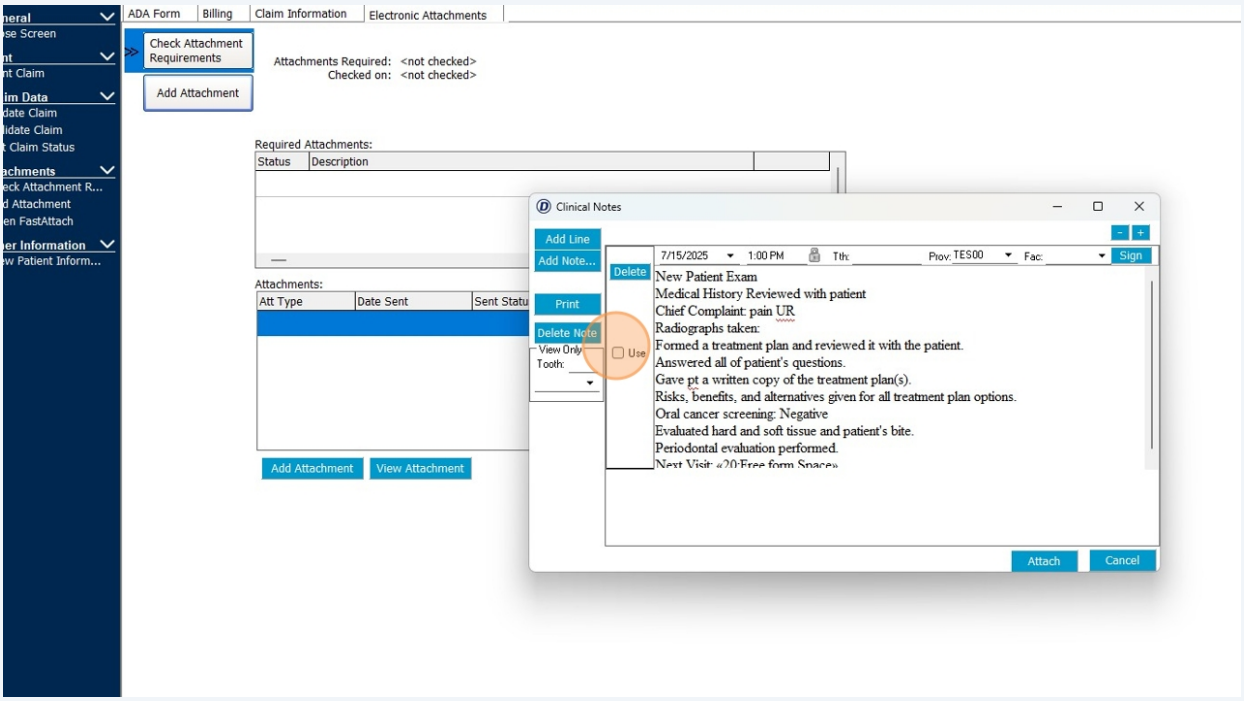


9 Click "Continue"

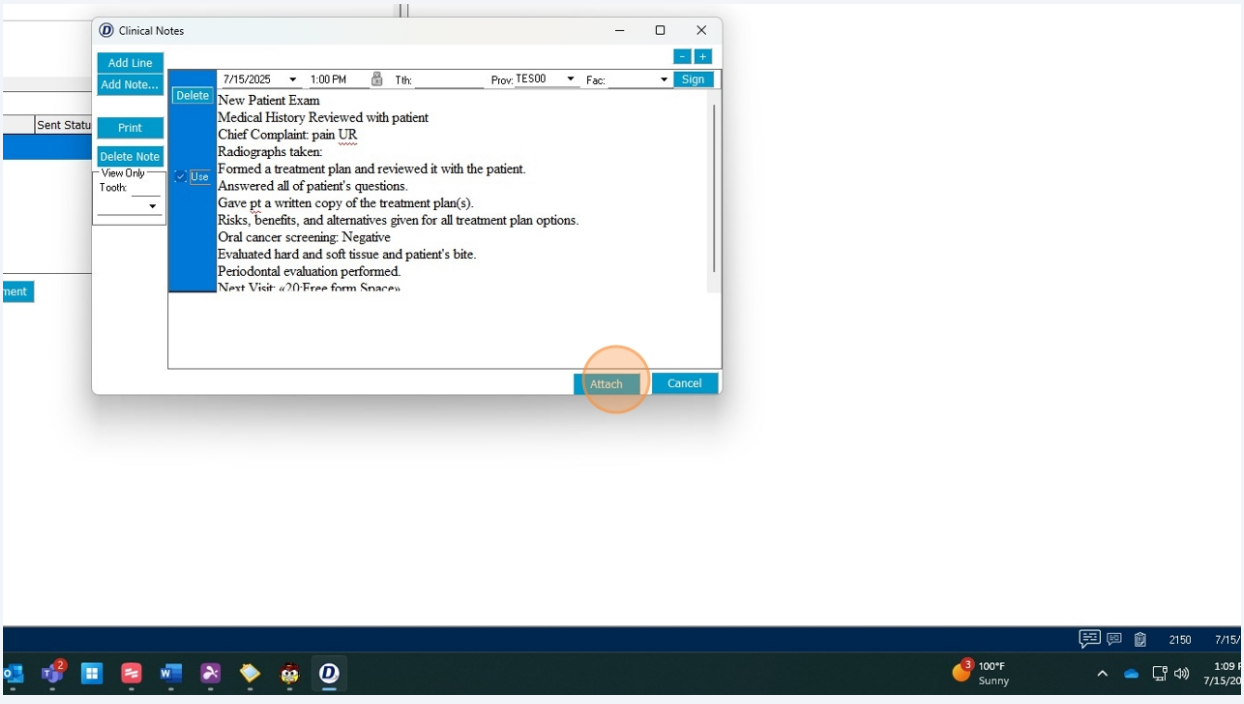


10 The next pop up box will differ for the different type of attachments

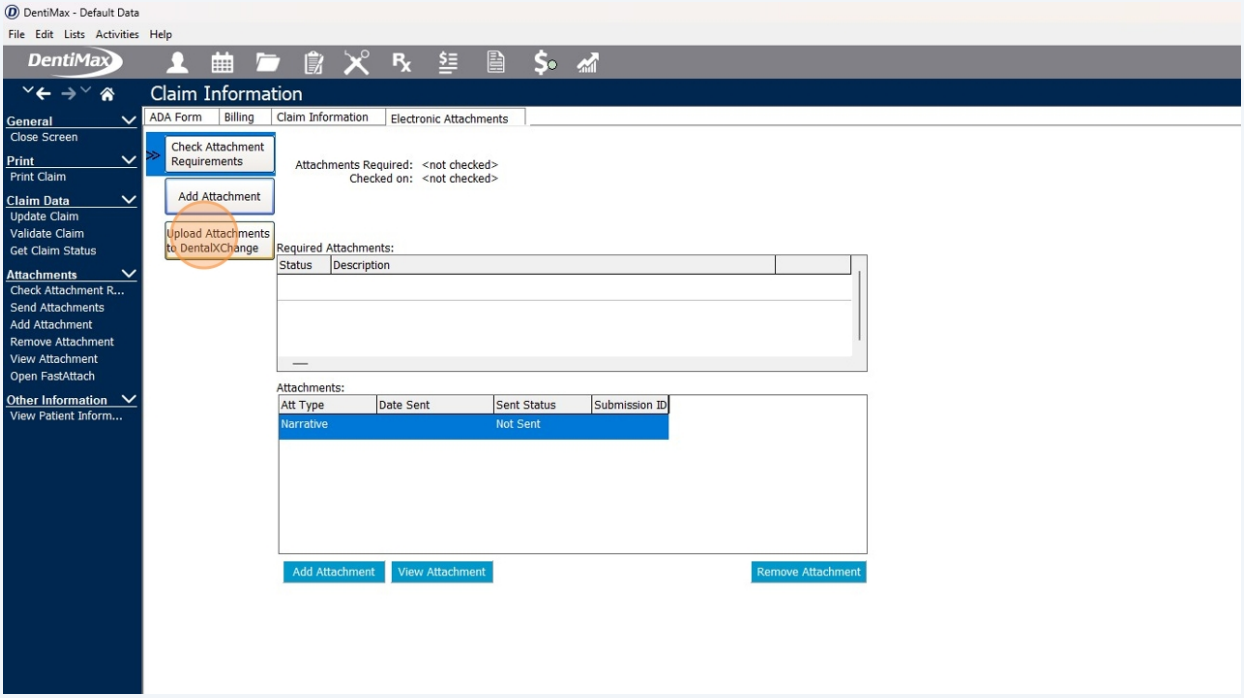
This is the Clinical Notes attachment; click the Use box



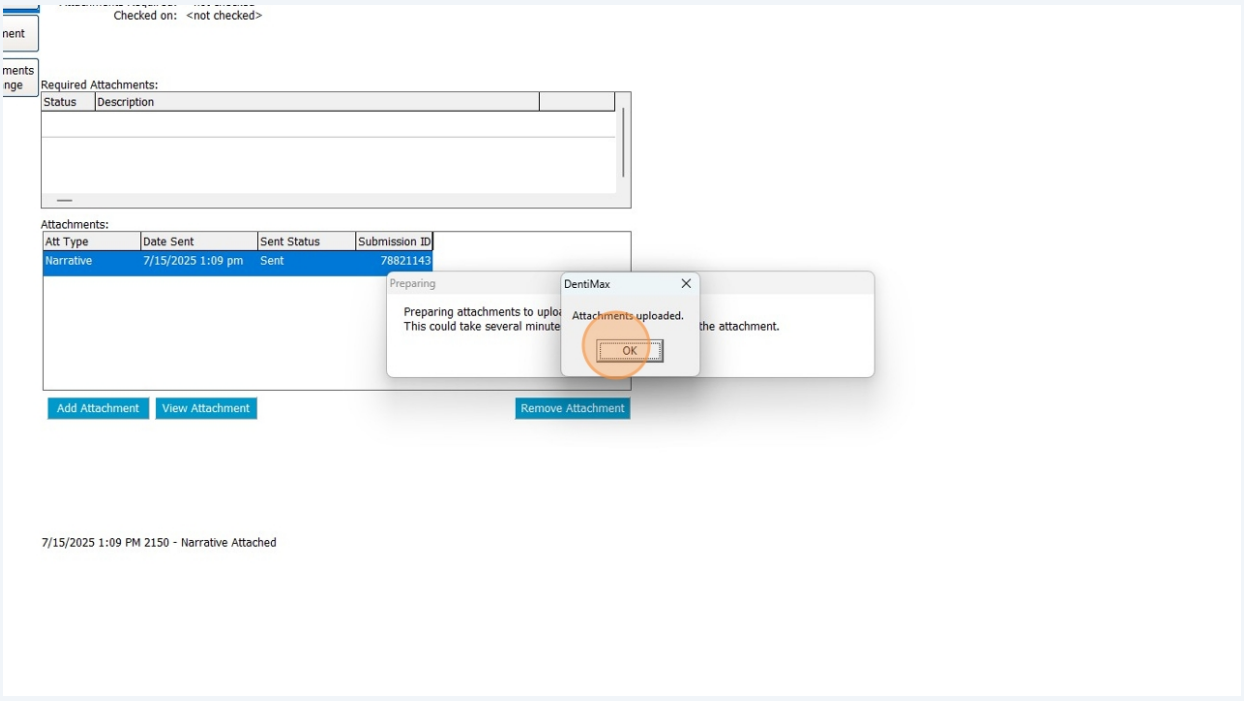
11 Click "Attach"



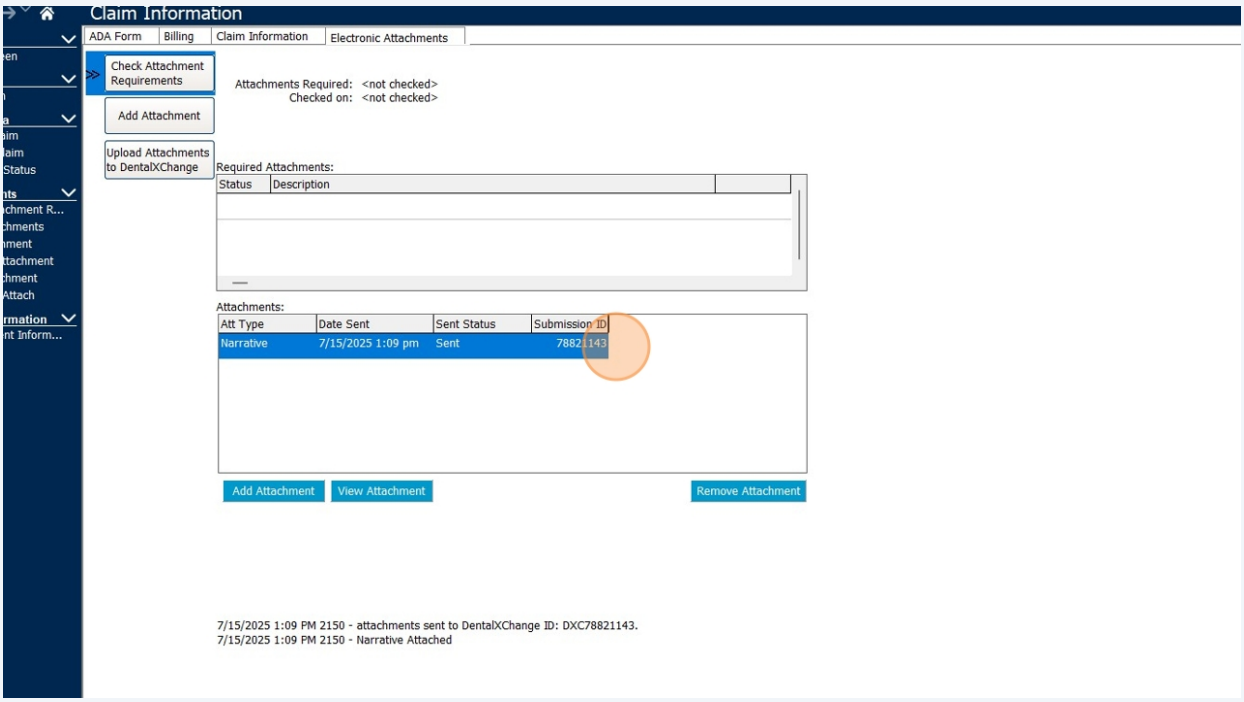
12 Once you have added all necessary attachments click Upload Attachments to DentalXChange"



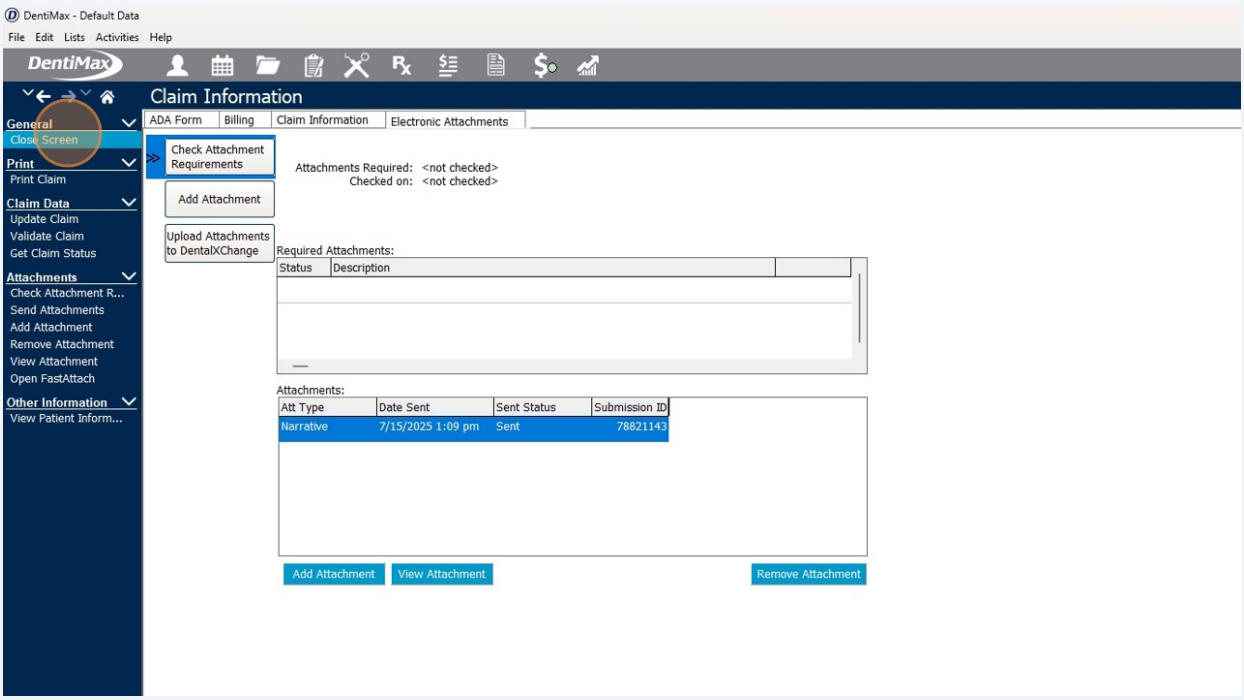
13 Click "OK"



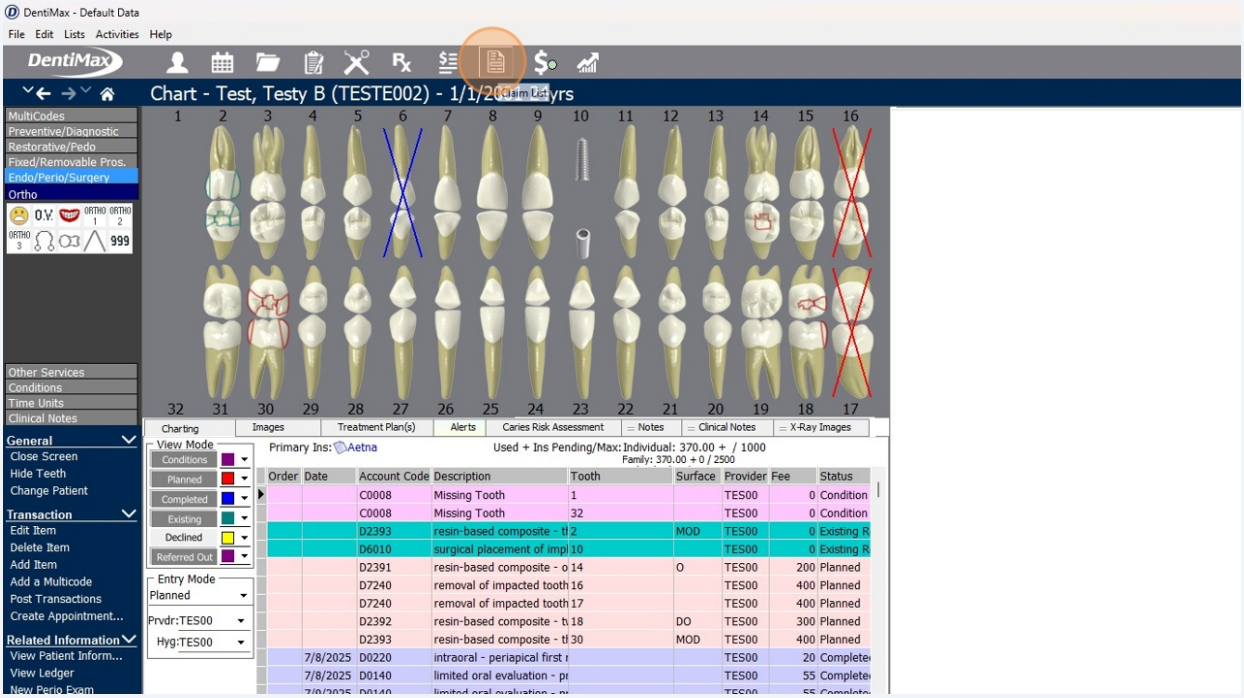
14 You will now have a claim attachment Submission ID



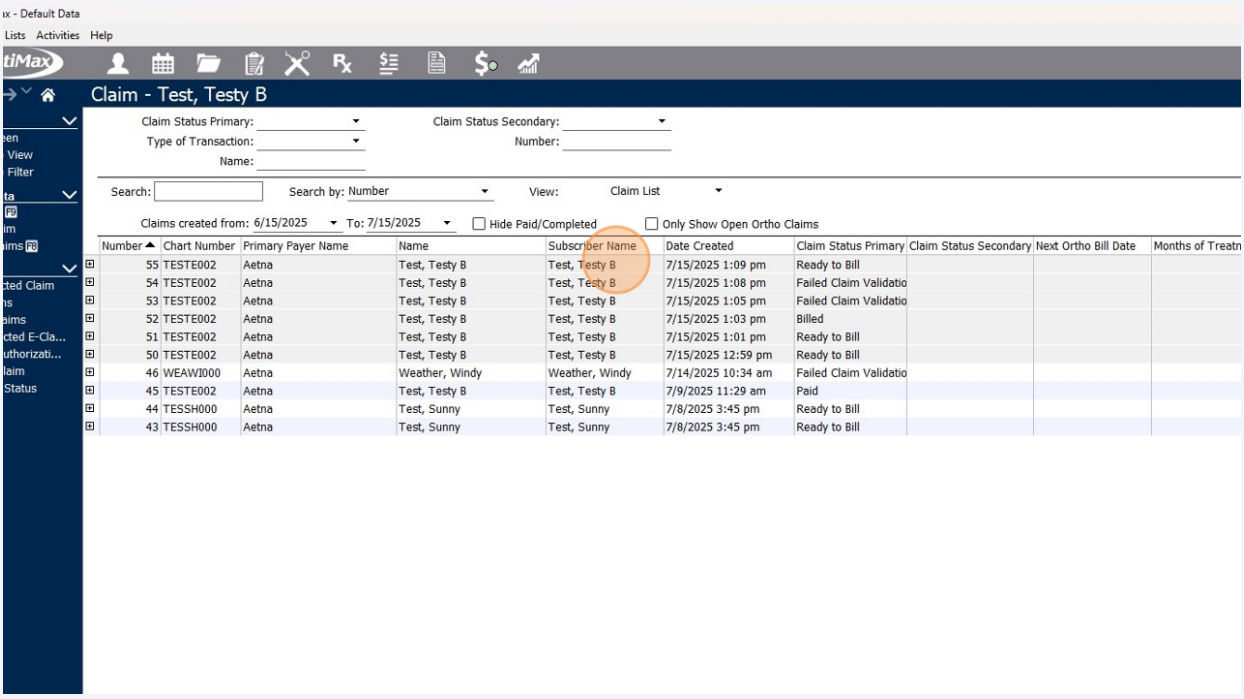
15 Click here



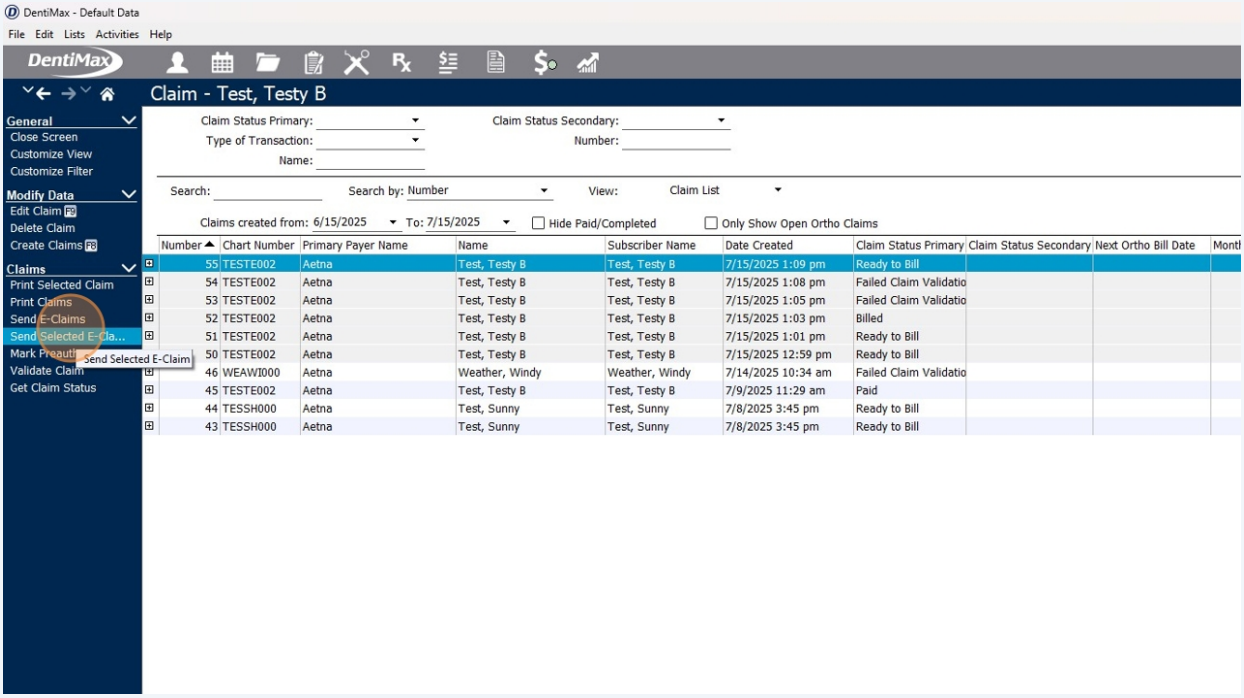
16 Open your Claims List



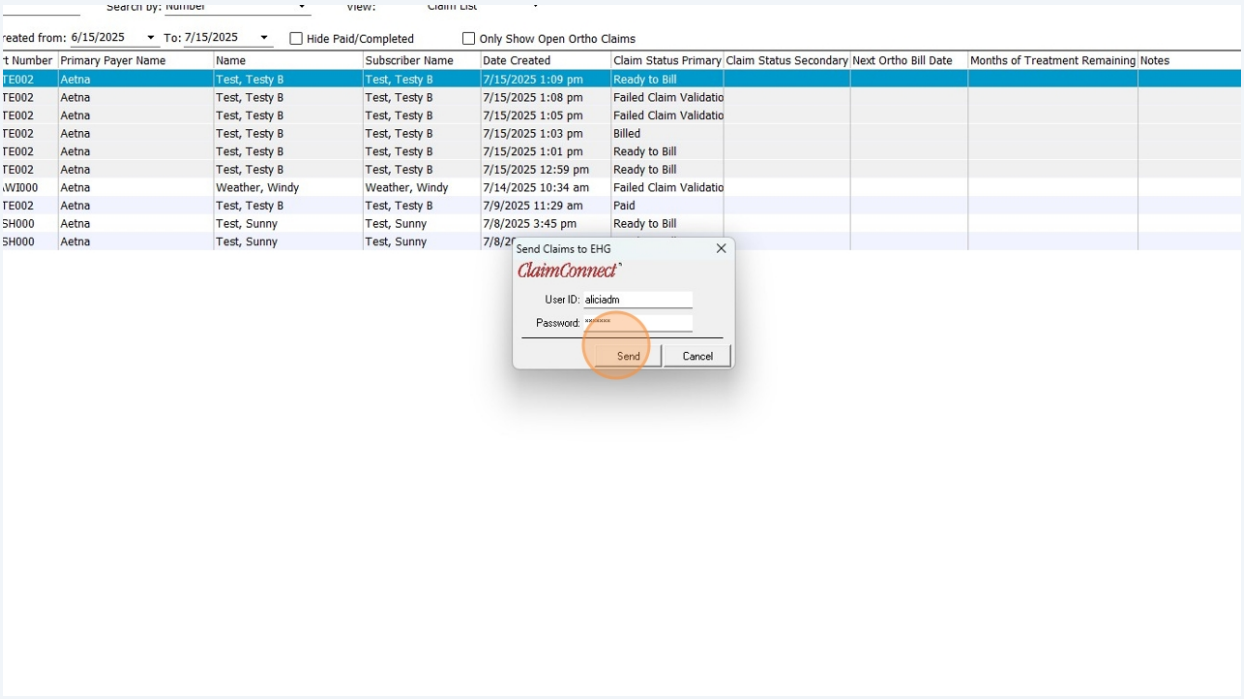
17 You will notice the Pre-Treatment claims will be gray lines



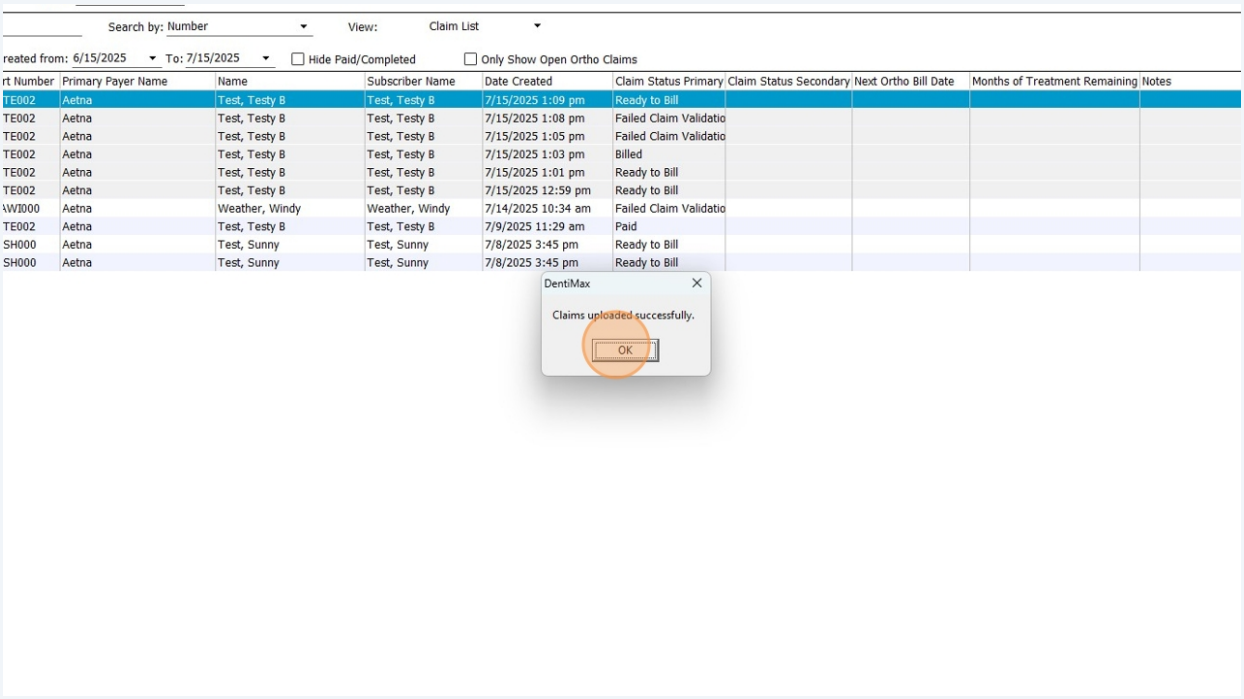
18 Select the claim you want to send, click Send Selected E-Claim



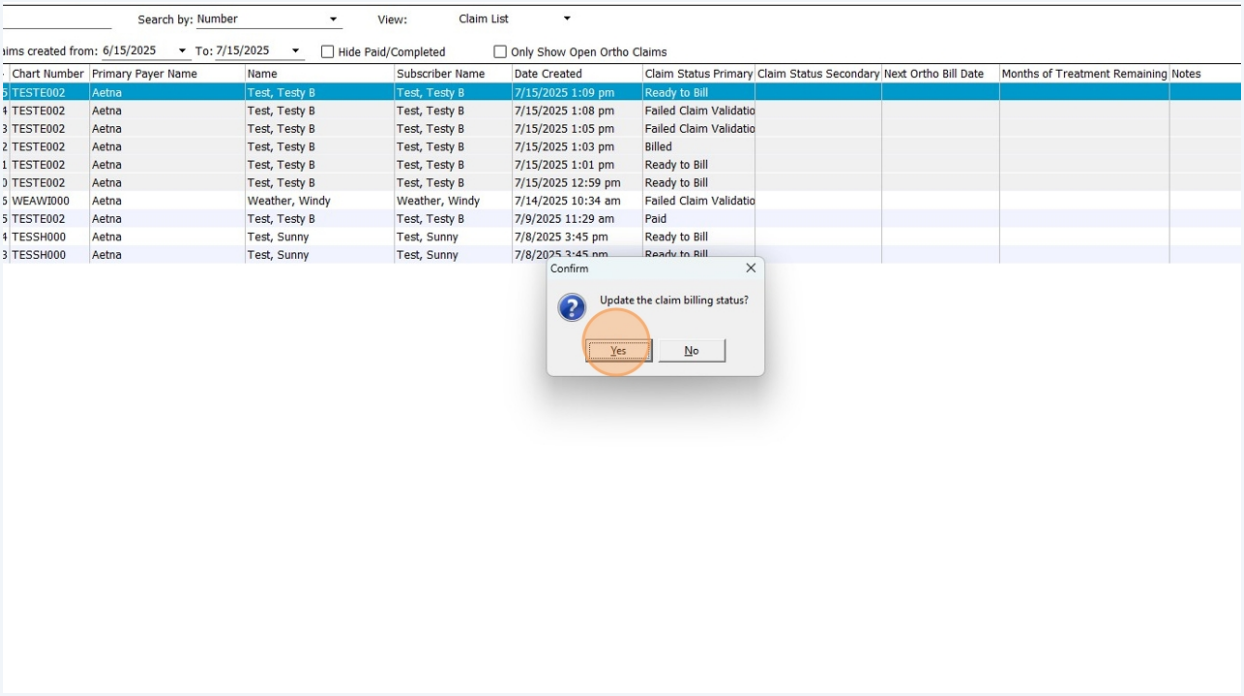
19 Click "Send"



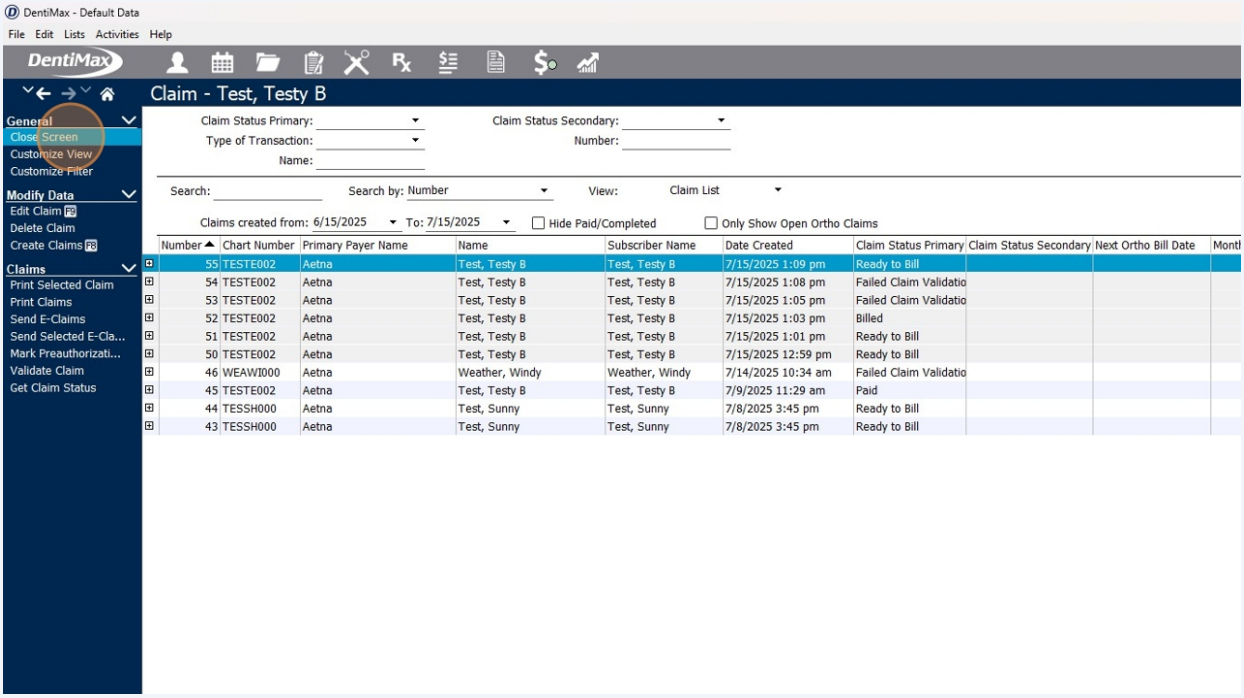
20 Click "OK"



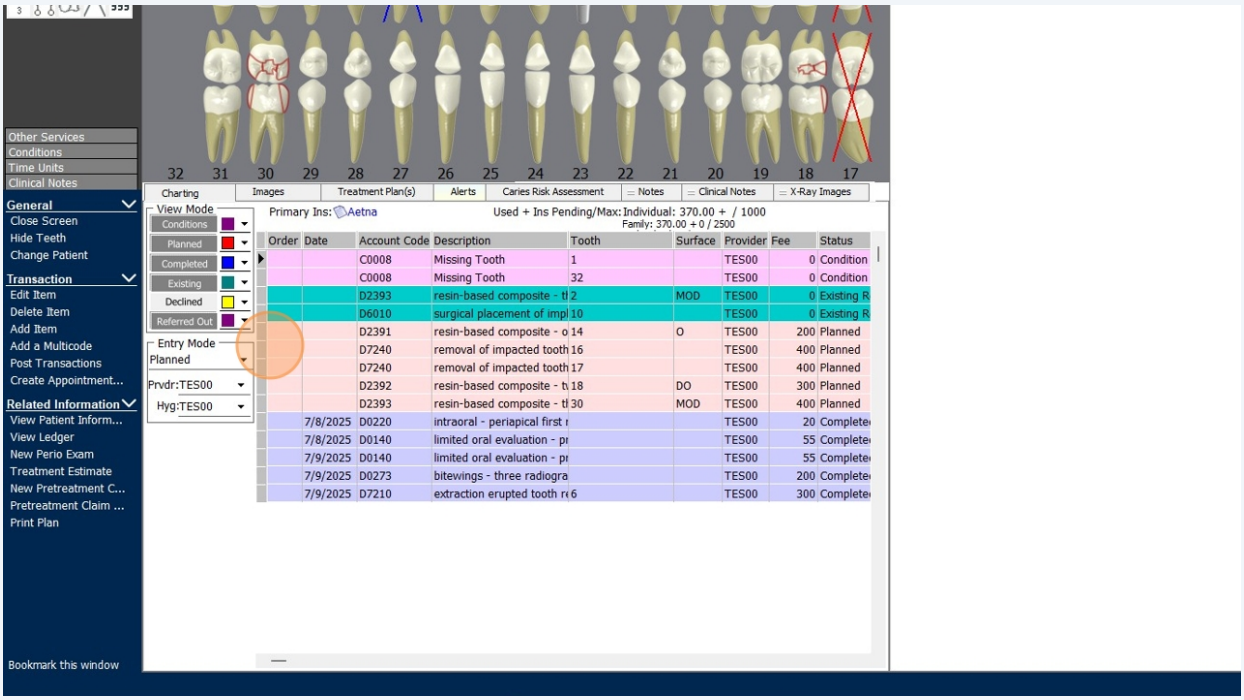
21 Click "Yes"



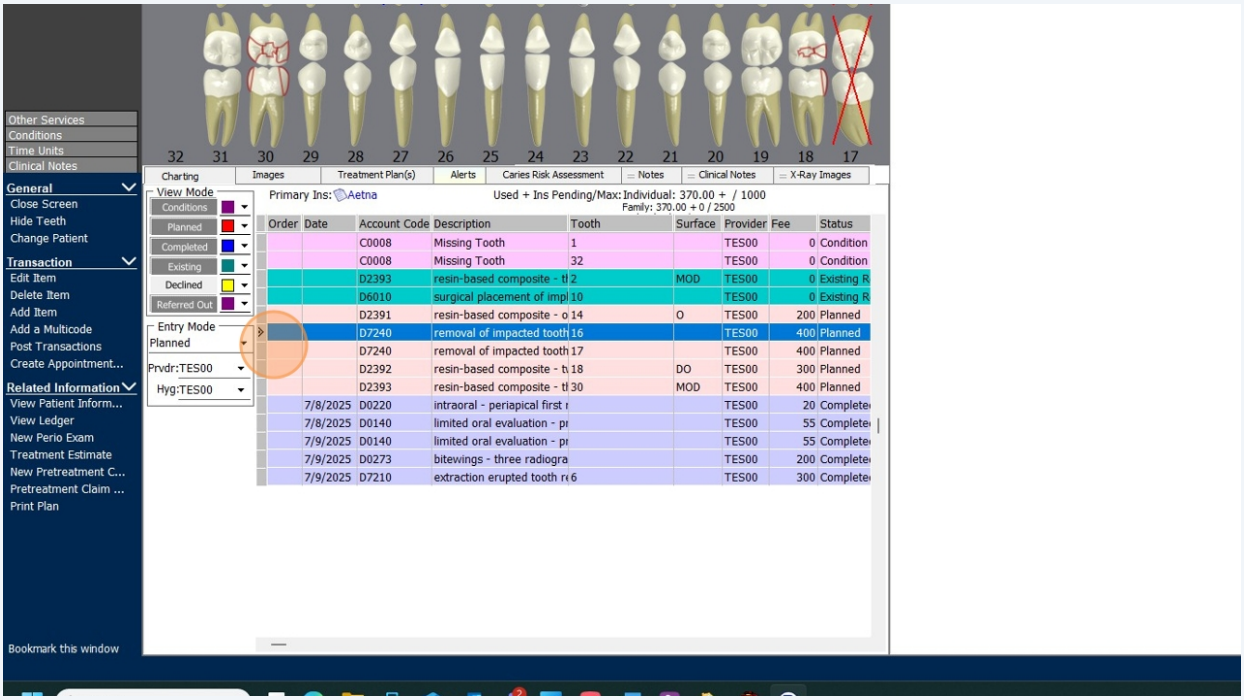
22 Close claim



23 If you are only needing to send Pre-Treatment Claim for selected item only

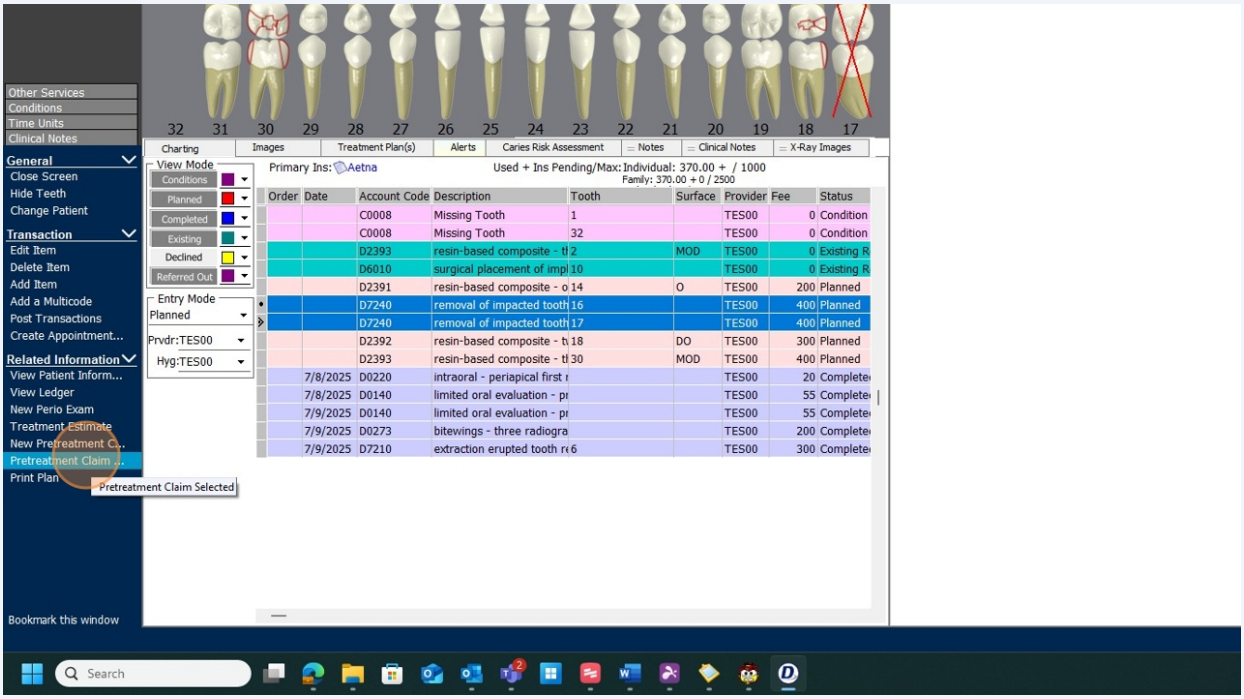


24 Select the treatment for the Pre-Treatment claim

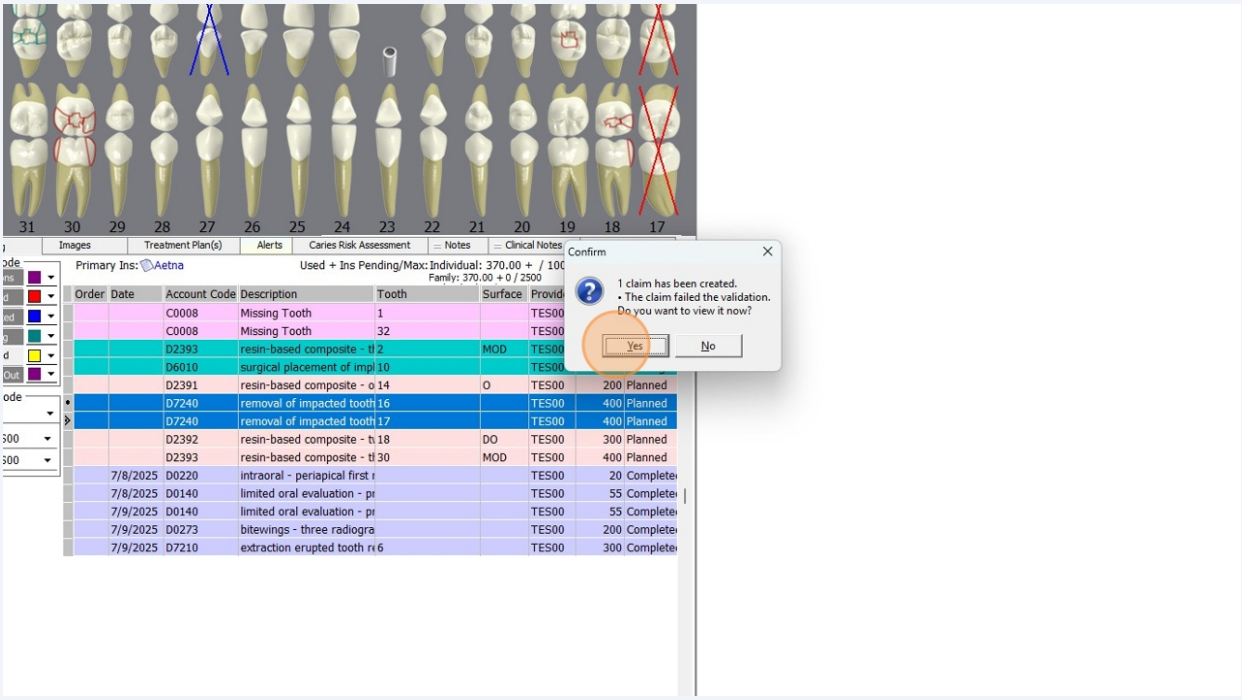


25 To select multiple; select the first item then hold ctrl button on keyboard and click other item(s)

Click Pre-Treatment Claim Selected

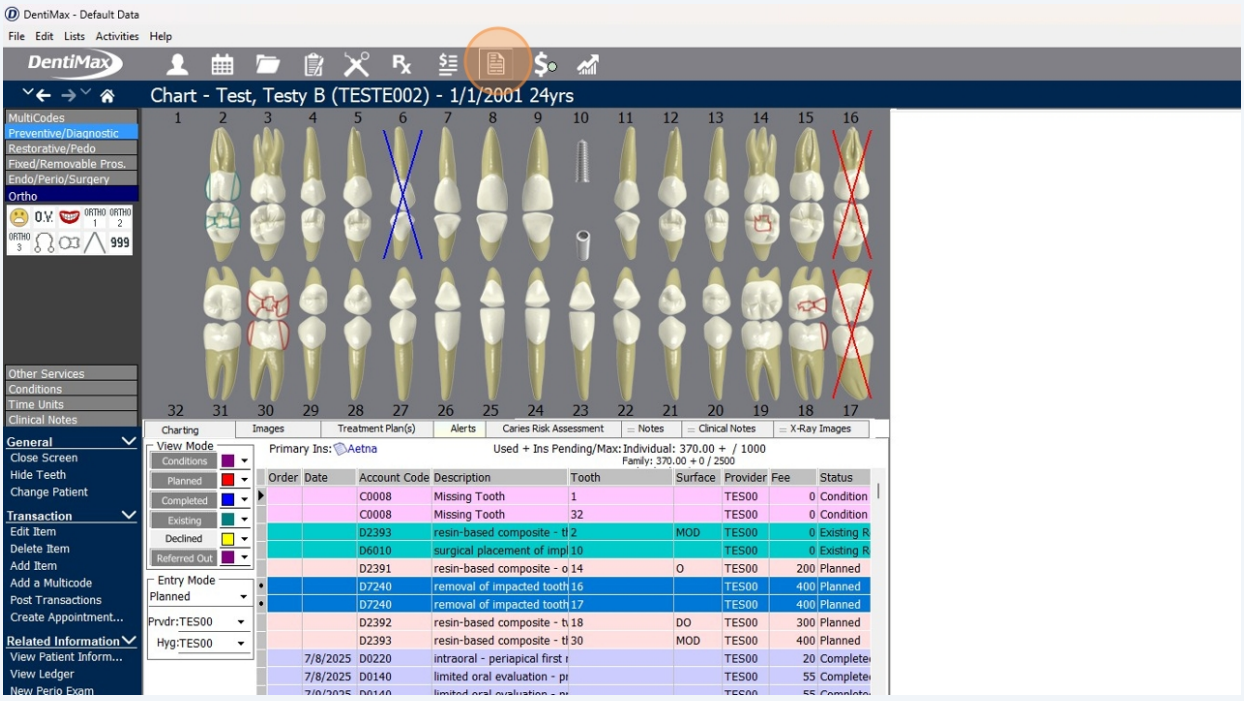


26 Follow all previous instructions: 5-21

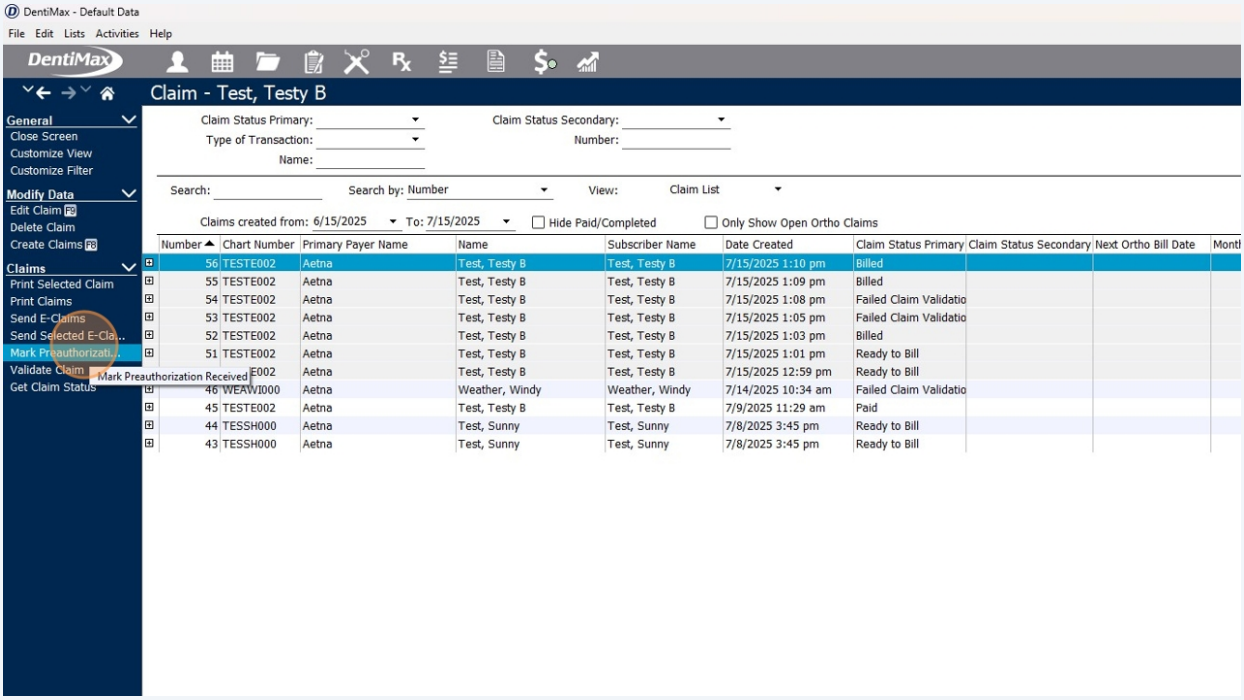


27 To mark Pre-Treatment Claim as received:

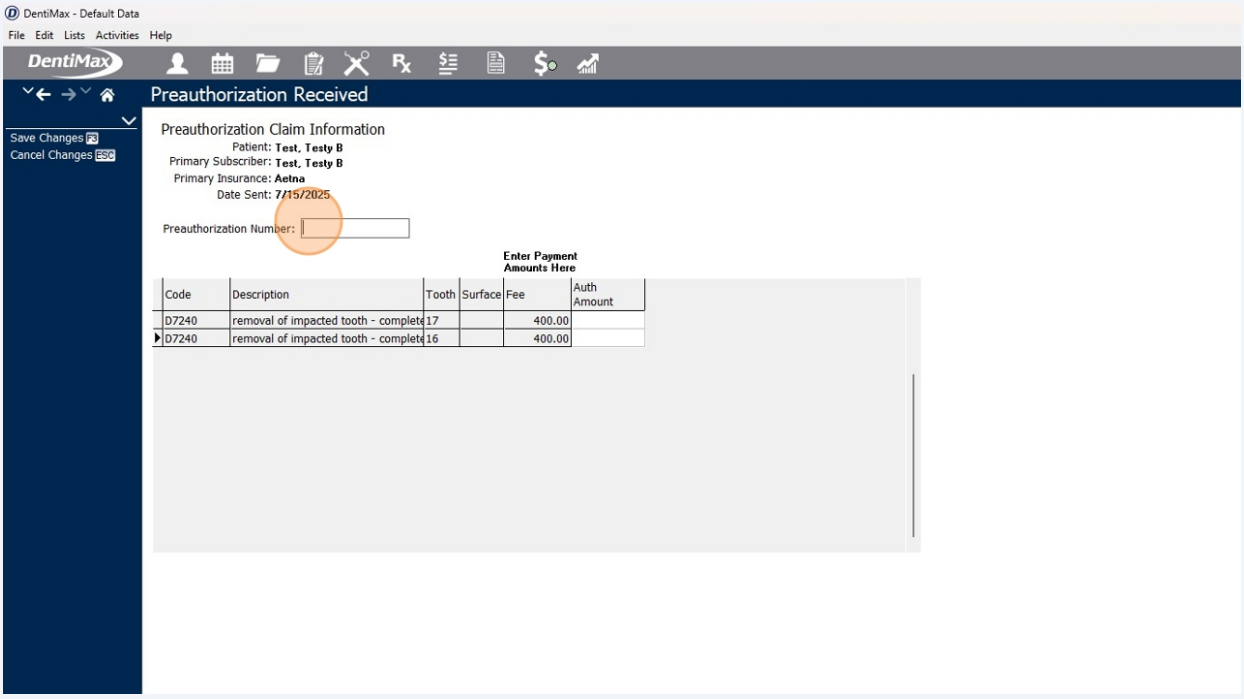
Open Claims List



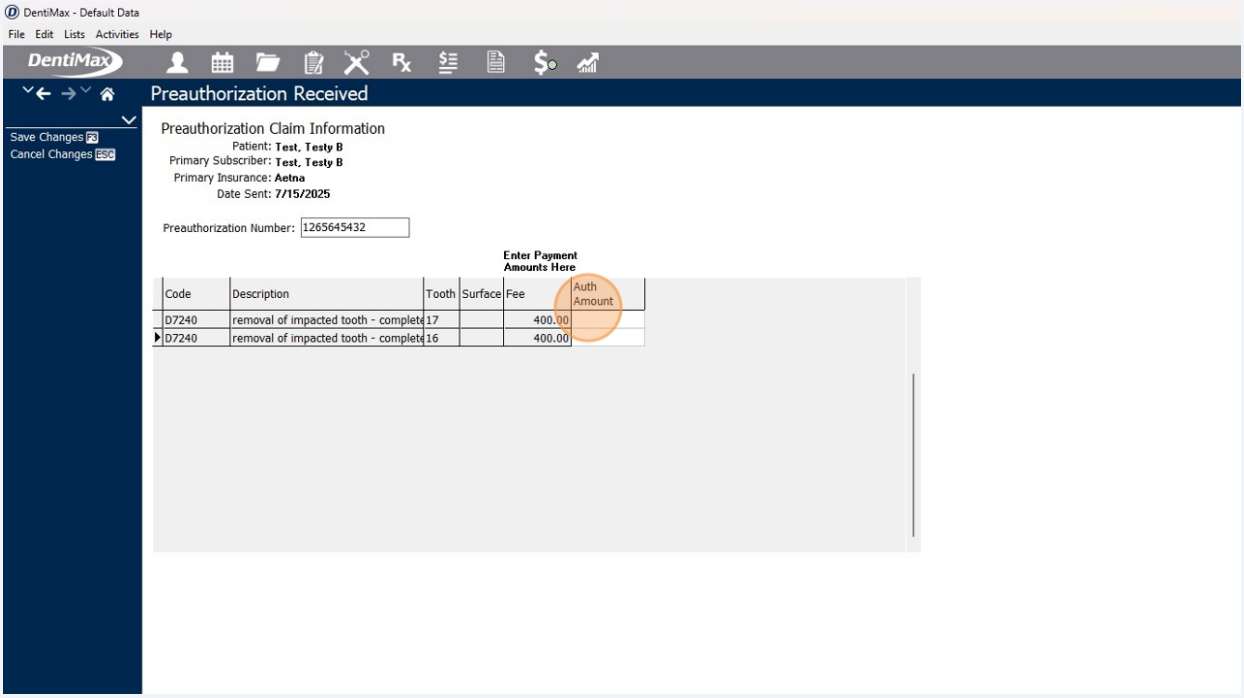
28 Select Pre-Treatment Claim that has been received: On the left menu click Mark PreTreatment Received



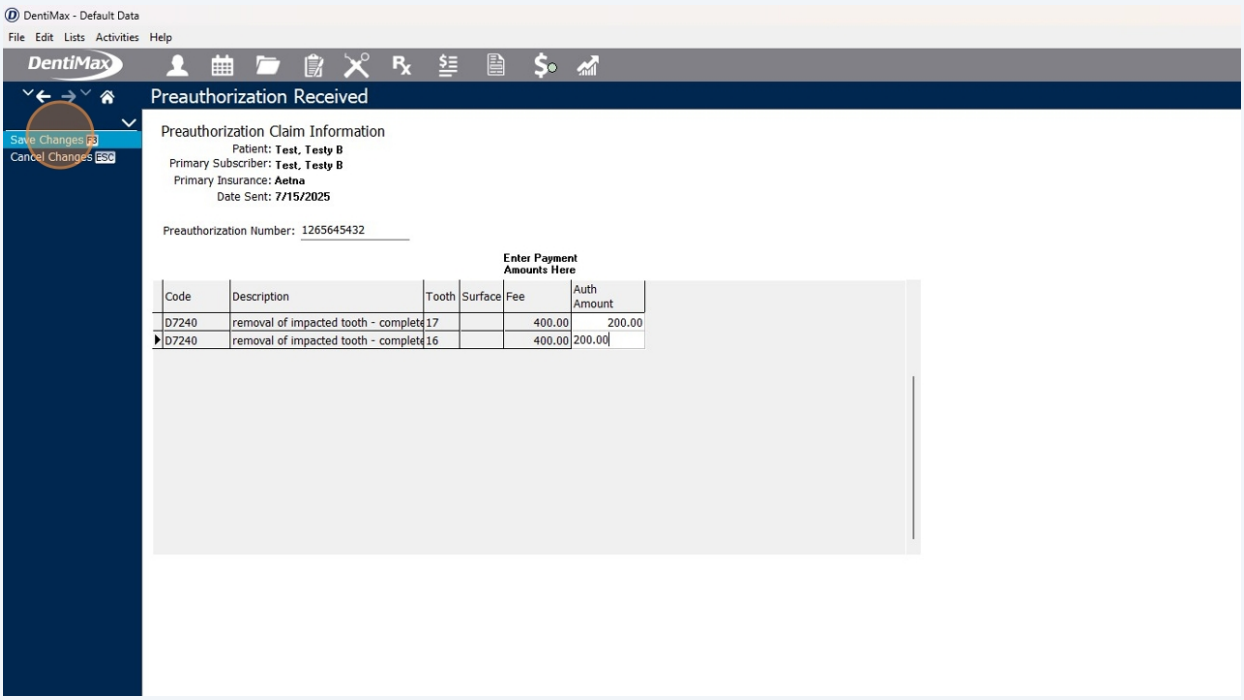
29 Enter Preauthorization number



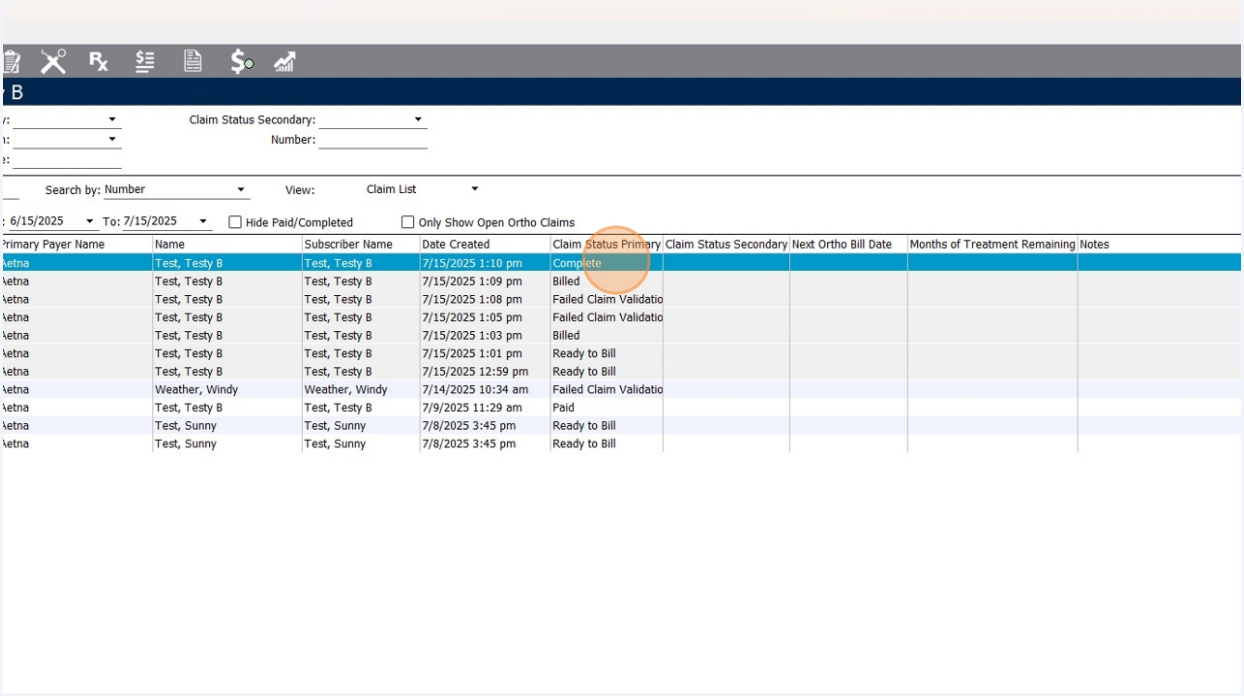
30 Enter the amounts approved



31 Click here



32 Pre-Treatment will be marked Complete



33 Close Screen