

FLOW: Adding/Printing Ledger Note



1 From a patient ledger

Browser tabs: Conv X, DM X, kios X, Pract X, Bann X, Flow X, Sele X, Deni X, Deni X, Noti X, Com X, Acce X, Rem X, Bets X, 250 X, 325 X

URL: https://katanastaging.dentimax.com/ledgers/30b453bf-01f1-4a29-8f26-5114c93ed1ce

ARISU000 - Sunny Arizona

< Ledger

Patient

Arizona, Sunny - ARISU000

- Show All Recent and Open Billings
- Show Family
- Show All History
- Hide Zero Balances
- Only Ins Pending

Detail View Sort by Date

Billing Information

Insurance	Est Due	Charges:	\$2,940.00	Primary
Ins 1: Metlife Dental Claims , Ameritas ...	\$2,358.00	Adjustments:	\$0.00	Balance
Ins 2: None	\$0.00	Ins Pmts:	\$0.00	Std Ded
HOH: Arizona, Sunny	\$62.00	Patient Pmts:	-\$520.00	Prv Ded
Total:			\$2,420.00	Other De
				Ins 1 Us
				Ins 1 Ma
Current			\$1,582.00	30 Days
				\$838.00

Search transactions

Date	Note	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1 Paid	Ins
9/8/25		Sunny	8	D7210	extraction erupted tooth requiring remov	NIC00	3		\$300.00	Completed	\$0.00				\$300.00		
9/8/25		Sunny	8	D7240	removal of impacted tooth - completely E	NIC00	15		\$600.00	Completed	\$0.00	-\$100.00			\$500.00		
9/8/25		Sunny	8	PATCASH	Patient Cash Payment	NIC00			-\$100.00	Completed							
9/2/25		Sunny	8	D1110	prophylaxis - adult	NIC00			\$0.00	Completed	\$0.00				\$0.00		
9/2/25		Sunny	8	PATCHEC	Patient Credit	NIC00			-\$18.00	Completed					-\$18.00		
9/2/25		Sunny	8	D7240	removal of impacted tooth - completely E	NIC00	1		\$1,000.00	Completed	\$0.00	-\$200.00			\$800.00		
9/2/25		Sunny	8	PATCHECI	Patient Check Pymt	NIC00			-\$200.00	Completed							

2 On the procedure line that you need to add the ledger note: RIGHT CLICK

Show All History
 Hide Zero Balances
 Only Ins Pending

Total: \$2,420.00 Other Ins 1
Ins 1

Current \$1,582.00 30 Days \$838.00

Detail View Sort by Date

Search transactions

Date	Note	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Inst1 Paid
9/8/25		Sunny	8	D7210	extraction erupted tooth requiring remov	NIC00	3		\$300.00	Completed	\$0.00				\$300.00	
9/8/25		Sunny	8	D7240	removal of impacted tooth - completely E	NIC00	15		\$600.00	Completed	\$0.00	-\$100.00			\$500.00	
9/8/25		Sunny	8	PATCASH	Patient Cash Payment	NIC00			-\$100.00	Completed						
9/2/25		Sunny	8	D1110	prophylaxis - adult	NIC00			\$0.00	Completed	\$0.00				\$0.00	
9/2/25		Sunny	8	PATCHEC	Patient Credit	NIC00			-\$18.00	Completed					-\$18.00	
9/2/25		Sunny	8	D7240	removal of impacted tooth - completely E	NIC00	1		\$1,000.00	Completed	\$0.00	-\$200.00			\$800.00	
9/2/25		Sunny	8	PATCHECI	Patient Check Pymt	NIC00			-\$200.00	Completed						
9/2/25		Sunny	8	D0274	bitewings - four radiographic images	NIC00			\$0.00	Completed	\$0.00				\$0.00	
9/25/25		Sunny	8	NOTE	pre-deployment exam					Completed						
8/19/25		Sunny	8	D0330	panoramic radiographic image	NIC00			\$30.00	Completed	\$0.00				\$30.00	
8/18/25		Sunny	7	D7210	extraction erupted tooth requiring remov	NIC00	1		\$0.00	Completed	\$0.00				\$0.00	
8/18/25		Sunny	7	D2393	resin-based composite - three surfaces pc	NIC00	31	MOD	\$370.00	Completed	\$0.00	-\$74.00			\$296.00	
8/19/25		Sunny	7	PATCHECI	Patient Check Pymt	NIC00			-\$20.00	Completed						

View Planned Items View Ledger Items View: Detail - All

3 Select "New Ledger Note"

katanastaging.dentimax.com/ledgers/30b453bf-01f1-4a29-8f26-5114c93ed1ce

ARISU000 - Sunny Arizona

Show All Recent and Open Billings
 Show Family
 Show All History
 Hide Zero Balances
 Only Ins Pending

Total: \$2,420.00 Other Ins 1
Ins 1

Current \$1,582.00 30 Days \$838.00

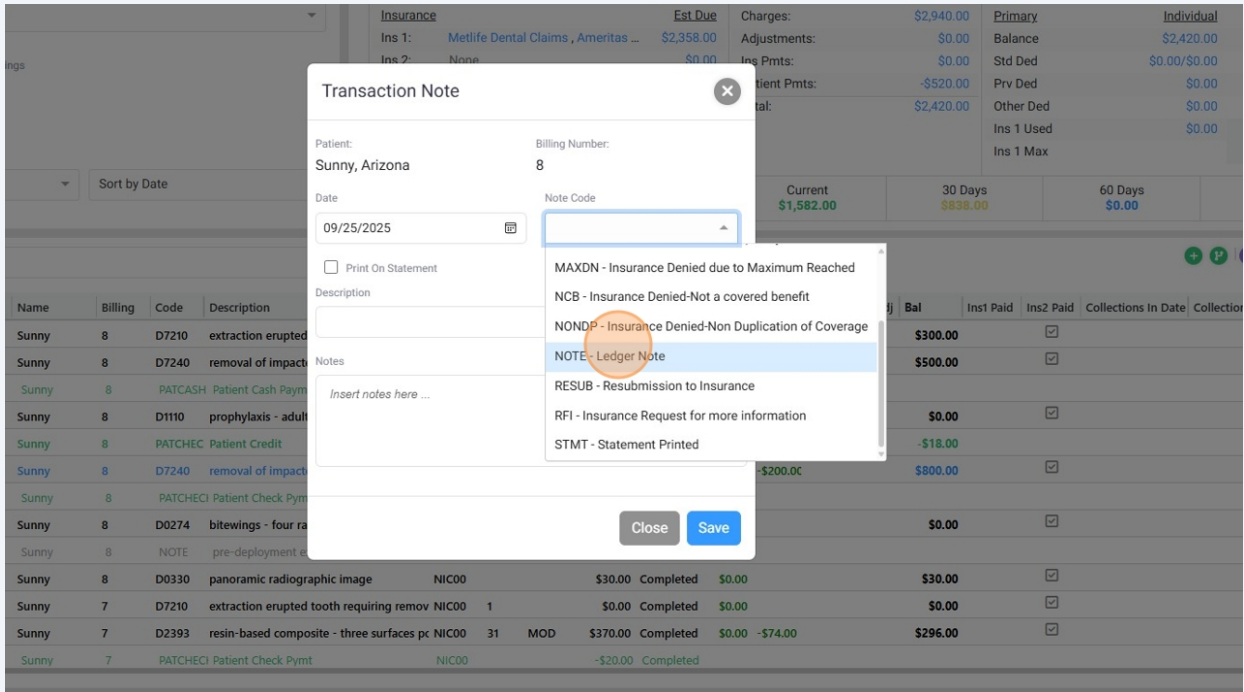
Detail View Sort by Date

Search transactions

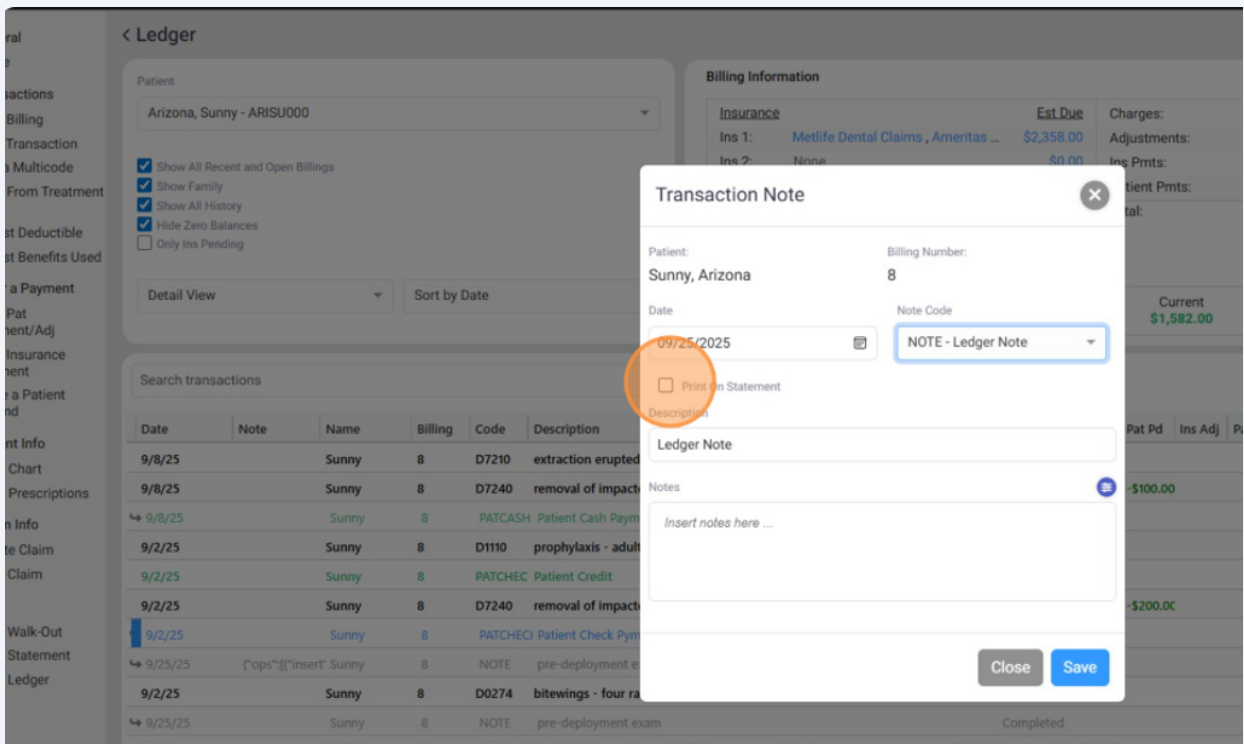
Date	Note	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Inst1 Paid	Inst2 Paid
9/8/25		Sunny	8	D7210	extraction erupted tooth requiring r	NIC00			\$300.00	Completed	\$0.00				\$300.00		<input checked="" type="checkbox"/>
9/8/25		Sunny	8	D7240	removal of impacted tooth - comple	NIC00			\$600.00	Completed	\$0.00	-\$100.00			\$500.00		<input checked="" type="checkbox"/>
9/8/25		Sunny	8	PATCASH	Patient Cash Payment	NIC00			-\$100.00	Completed							
9/2/25		Sunny	8	D1110	prophylaxis - adult	NIC00			\$0.00	Completed	\$0.00				\$0.00		<input checked="" type="checkbox"/>
9/2/25		Sunny	8	PATCHEC	Patient Credit	NIC00			-\$18.00	Completed					-\$18.00		
9/2/25		Sunny	8	D7240	removal of impacted tooth - completely E	NIC00	1		\$1,000.00	Completed	\$0.00	-\$200.00			\$800.00		<input checked="" type="checkbox"/>
9/2/25		Sunny	8	PATCHECI	Patient Check Pymt	NIC00			-\$200.00	Completed							
9/2/25		Sunny	8	D0274	bitewings - four radiographic images	NIC00			\$0.00	Completed	\$0.00				\$0.00		<input checked="" type="checkbox"/>

View Planned Items View Ledger Items View: Detail - All

4 From the drop-down menu, select the appropriate note type



5 If you need this note to print on the ledger be sure to mark "Print on Statement" box



6 In the Description box you can write what you want to see on the ledger

Transaction Note

Patient: Sunny, Arizona
Billing Number: 8
Date: 09/25/2025
Note Code: NOTE - Ledger Note

Print On Statement

Description: Ledger Note

Notes: Insert notes here ...

Close Save

Date	Note	Name	Billing	Code	Description
9/8/25		Sunny	8	D7210	extraction erupted
9/8/25		Sunny	8	D7240	removal of impact
9/8/25		Sunny	8	PATCASH	Patient Cash Paym
9/2/25		Sunny	8	D1110	prophylaxis - adult
9/2/25		Sunny	8	PATCHEC	Patient Credit
9/2/25		Sunny	8	D7240	removal of impact
9/2/25		Sunny	8	PATCHECI	Patient Check Pym
9/2/25		Sunny	8	D0274	bitewings - four ra
9/25/25		Sunny	8	NOTE	pre-deployment e
8/19/25		Sunny	8	D0330	panoramic radiographic image
8/18/25		Sunny	7	D7210	extraction erupted tooth requiring remov
8/18/25		Sunny	7	D2393	resin-based composite - three surfaces pc

7 You can also add any additional information needed in the Notes box to view when you open the Ledger Note line

Transaction Note

Patient: Sunny, Arizona
Billing Number: 8
Date: 09/25/2025
Note Code: NOTE - Ledger Note

Print On Statement

Description: pre-deployment extraction

Notes: Insert notes here ...

Close Save

Date	Note	Name	Billing	Code	Description
9/8/25		Sunny	8	D7210	extraction erupted
9/8/25		Sunny	8	D7240	removal of impact
9/8/25		Sunny	8	PATCASH	Patient Cash Paym
9/2/25		Sunny	8	D1110	prophylaxis - adult
9/2/25		Sunny	8	PATCHEC	Patient Credit
9/2/25		Sunny	8	D7240	removal of impact
9/2/25		Sunny	8	PATCHECI	Patient Check Pym
9/2/25		Sunny	8	D0274	bitewings - four ra
9/25/25		Sunny	8	NOTE	pre-deployment e
8/19/25		Sunny	8	D0330	panoramic radiographic image
8/18/25		Sunny	7	D7210	extraction erupted tooth requiring remov
8/18/25		Sunny	7	D2393	resin-based composite - three surfaces pc

8 Click "Save"

Patient: Sunny, Arizona
 Billing Number: 8
 Date: 09/25/2025
 Note Code: NOTE - Ledger Note
 Print On Statement
 Description: pre-deployment extraction
 Notes: additional notes
 Close Save

Pat Pd	Ins Adj	Pat Adj	Bal	Ins1 Paid	Ins2 Paid	Collections In Date	Collections Phase	Chart N
			\$300.00					
			\$500.00					
			\$0.00					
			-\$18.00					
			\$800.00					
			\$0.00					
			\$30.00					
			\$0.00					
			\$296.00					

View: Detail - All Post Date: 09/25/2025

9 Now you will see the ledger note attached to the selected procedure

Total: \$2,420.00
 Other Ded: \$0.00
 Ins 1 Used: \$0.00
 Ins 1 Max: \$0.00
 Current: \$1,582.00
 30 Days: \$838.00

Date	Note	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1 Paid	Ins2 Paid	Coll
9/25		Sunny	8	D7210	extraction erupted tooth requiring remov	NIC00	3		\$300.00	Completed	\$0.00				\$300.00			
9/25		Sunny	8	D7240	removal of impacted tooth - completely impacted	NIC00	15		\$600.00	Completed	\$0.00	-\$100.00			\$500.00			
9/25		Sunny	8	PATCASH	Patient Cash Payment	NIC00			-\$100.00	Completed								
9/25		Sunny	8	D1110	prophylaxis - adult	NIC00			\$0.00	Completed	\$0.00				\$0.00			
9/25		Sunny	8	PATCHEC	Patient Credit	NIC00			-\$18.00	Completed					-\$18.00			
9/25		Sunny	8	D7240	removal of impacted tooth - completely impacted	NIC00	1		\$1,000.00	Completed	\$0.00	-\$200.00			\$800.00			
9/25		Sunny	8	PATCHEC	Patient Check Pymt	NIC00			-\$200.00	Completed								
9/25		Sunny	8	NOTE	pre-deployment extraction					Completed								
9/25		Sunny	8	D0274	bitewings - four radiographic images	NIC00			\$0.00	Completed	\$0.00				\$0.00			
9/25		Sunny	8	NOTE	pre-deployment exam					Completed								
9/25		Sunny	8	D0330	panoramic radiographic image	NIC00			\$30.00	Completed	\$0.00				\$30.00			
9/25		Sunny	7	D7210	extraction erupted tooth requiring remov	NIC00	1		\$0.00	Completed	\$0.00				\$0.00			
9/25		Sunny	7	D2393	resin-based composite - three surfaces pc	NIC00	31	MOD	\$370.00	Completed	\$0.00	-\$74.00			\$296.00			

View: Detail - All

10

If you need to print a copy for the patient: Use the Print Ledger on the left side menu

Plan
Adjust Deductible
Adjust Benefits Used

Enter a Payment
New Pat Payment/Adj
New Insurance Payment
Issue a Patient Refund

Patient Info
View Chart
View Prescriptions

Claim Info
Create Claim
Print Claim

Print
Print Walk-Out
Print Statement
Print Ledger

Show All History
 Hide Zero Balances
 Only Ins Pending

Detail View Sort by Date

Total:
Current \$1,582.00

Search transactions

Date	Note	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj
9/8/25		Sunny	8	D7210	extraction erupted tooth requiring remov	NIC00	3		\$300.00	Completed	\$0.00			
9/8/25		Sunny	8	D7240	removal of impacted tooth - completely t	NIC00	15		\$600.00	Completed	\$0.00	-\$100.00		
9/8/25		Sunny	8	PATCASH	Patient Cash Payment	NIC00			-\$100.00	Completed				
9/2/25		Sunny	8	D1110	prophylaxis - adult	NIC00			\$0.00	Completed	\$0.00			
9/2/25		Sunny	8	PATCHEC	Patient Credit	NIC00			-\$18.00	Completed				
9/2/25		Sunny	8	D7240	removal of impacted tooth - completely t	NIC00	1		\$1,000.00	Completed	\$0.00	-\$200.00		
9/2/25		Sunny	8	PATCHECI	Patient Check Pymt	NIC00			-\$200.00	Completed				
9/25/25		Sunny	8	NOTE	pre-deployment extraction					Completed				
9/2/25		Sunny	8	D0274	bitewings - four radiographic images	NIC00			\$0.00	Completed	\$0.00			
9/25/25		Sunny	8	NOTE	pre-deployment exam					Completed				
8/19/25		Sunny	8	D0330	panoramic radiographic image	NIC00			\$30.00	Completed	\$0.00			
8/18/25		Sunny	7	D7210	extraction erupted tooth requiring remov	NIC00	1		\$0.00	Completed	\$0.00			
8/18/25		Sunny	7	D2393	resin-based composite - three surfaces pc	NIC00	31	MOD	\$370.00	Completed	\$0.00	-\$74.00		

View Planned Items View Ledger Items View: Detail - All

11

Click "OK"

Ins 2: None \$0.00
HOH: Arizona, Sunny \$62.00

Ins Pmts: \$0.00
Patient Pmts: -\$520.00
Total: \$2,420.00

Std Ded \$0.00/\$0.00
Prv Ded \$0.00 \$0.00
Other Ded \$0.00 \$0.00
Ins 1 Used \$0.00
Ins 1 Max

Current \$1,582.00
30 Days \$838.00
60 Days \$0.00
90+ Days \$0.00

Select a Report

Report Format
Patient Ledger

Close OK

Billing	Code	Description	Pat Pd	Ins Adj	Pat Adj	Bal	Ins1 Paid	Ins2 Paid	Collections In Date	Collections Phase	Chart Num
D7210	extraction erupted					\$300.00					
D7240	removal of impact					\$500.00					
PATCASH	Patient Cash Paym										
D1110	prophylaxis - adult					\$0.00					
PATCHEC	Patient Credit	NIC00				-\$18.00					
D7240	removal of impacted tooth - completely t	NIC00	1			\$800.00					
PATCHECI	Patient Check Pymt	NIC00				-\$200.00					
NOTE	pre-deployment extraction										
D0274	bitewings - four radiographic images	NIC00				\$0.00					
NOTE	pre-deployment exam										
D0330	panoramic radiographic image	NIC00				\$30.00					
D7210	extraction erupted tooth requiring remov	NIC00	1			\$0.00					
D2393	resin-based composite - three surfaces pc	NIC00	31	MOD		\$296.00					

View: Detail - All Post Date: 09/25/2025

12 You will see the note printed on ledger

Patient Ledger
Tiffanye

Sunny Arizona

Date	Name	Procedure	Tx Area	Dx Codes	Amount	Balance
9/8/2025	Sunny	D7240 removal of impacted tooth - c	15		\$600.00	\$500.00
9/8/2025		PATCASH Patient Cash Payment			(\$100.00)	
9/8/2025	Sunny	D7210 extraction erupted tooth requi	3		\$300.00	\$300.00
9/2/2025	Sunny	D1110 prophylaxis - adult			\$0.00	\$0.00
9/2/2025	Sunny	D0274 bitewings - four radiographic i			\$0.00	\$0.00
9/25/2025		NOTE pre-deployment exam				
9/2/2025	Sunny	PATCHECK Patient Credit			(\$18.00)	(\$18.00)
9/2/2025	Sunny	D7240 removal of impacted tooth - c	1		\$1,000.00	\$800.00
9/25/2025		NOTE pre-deployment extraction				
9/2/2025		PATCHECK Patient Check Pymt			(\$200.00)	
8/19/2025	Sunny	D0330 panoramic radiographic imag			\$30.00	\$30.00
8/18/2025	Sunny	D7210 extraction erupted tooth requi	1		\$0.00	\$0.00
8/18/2025	Sunny	D2391 resin-based composite - one : 18 O			\$290.00	\$232.00
9/2/2025		PATCHECK Patient Check Pymt			(\$58.00)	
8/18/2025	Sunny	D2392 resin-based composite - two : 2 MO			\$350.00	\$280.00
9/2/2025		PATCHECK Patient Check Pymt			(\$70.00)	
8/18/2025	Sunny	D2393 resin-based composite - three : 31 MOD			\$370.00	\$296.00
9/2/2025		PATCHECK Patient Check Pymt			(\$54.00)	
8/19/2025		PATCHECK Patient Check Pymt			(\$20.00)	

13 Use the printer icon to select your local printer

Patient Ledger
Tiffanye

Sunny Arizona

Date	Name	Procedure	Tx Area	Dx Codes	Amount	Balance
9/8/2025	Sunny	D7240 removal of impacted tooth - c	15		\$600.00	\$500.00
9/8/2025		PATCASH Patient Cash Payment			(\$100.00)	
9/8/2025	Sunny	D7210 extraction erupted tooth requi	3		\$300.00	\$300.00
9/2/2025	Sunny	D1110 prophylaxis - adult			\$0.00	\$0.00
9/2/2025	Sunny	D0274 bitewings - four radiographic i			\$0.00	\$0.00
9/25/2025		NOTE pre-deployment exam				
9/2/2025	Sunny	PATCHECK Patient Credit			(\$18.00)	(\$18.00)
9/2/2025	Sunny	D7240 removal of impacted tooth - c	1		\$1,000.00	\$800.00
9/25/2025		NOTE pre-deployment extraction				
9/2/2025		PATCHECK Patient Check Pymt			(\$200.00)	
8/19/2025	Sunny	D0330 panoramic radiographic imag			\$30.00	\$30.00
8/18/2025	Sunny	D7210 extraction erupted tooth requi	1		\$0.00	\$0.00
8/18/2025	Sunny	D2391 resin-based composite - one : 18 O			\$290.00	\$232.00
9/2/2025		PATCHECK Patient Check Pymt			(\$58.00)	
8/18/2025	Sunny	D2392 resin-based composite - two : 2 MO			\$350.00	\$280.00
9/2/2025		PATCHECK Patient Check Pymt			(\$70.00)	

14 IF you DO NOT see the ledger note showing on the print preview:

First thing to look at is to make sure the ledger note is marked "Print on Statement"

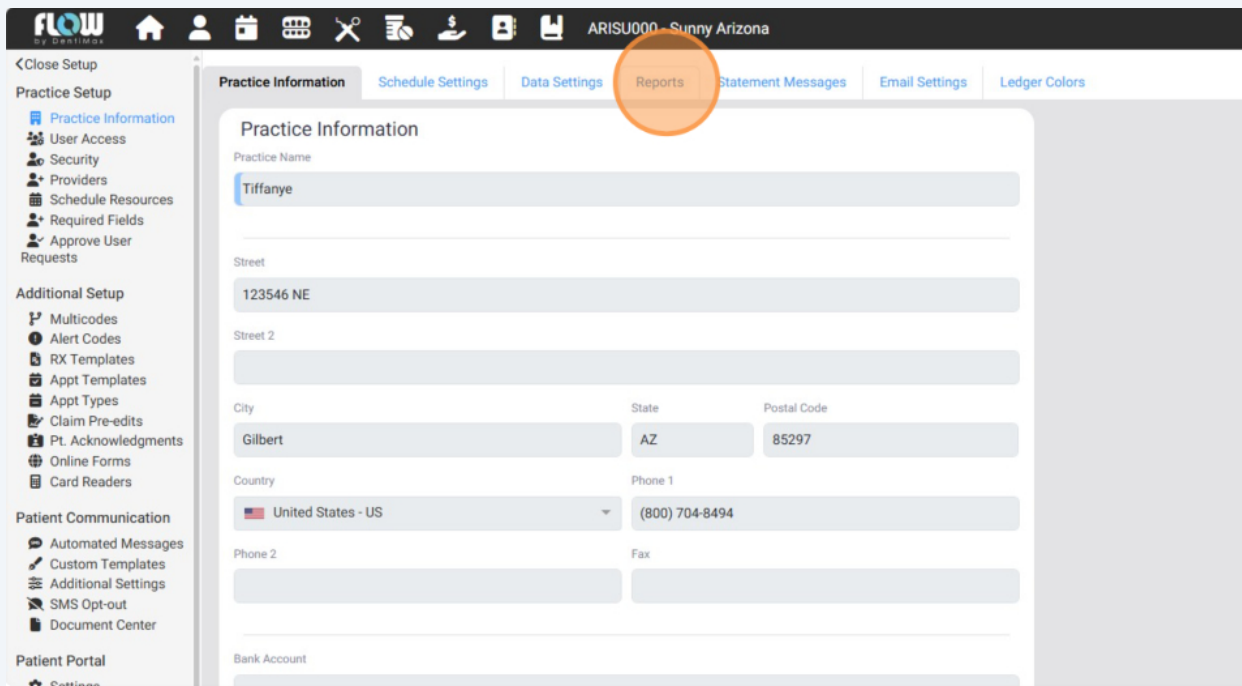
If this is marked; there is a setting in Practice Setup to check as well...

The screenshot shows a web browser window with a print menu open. The browser address bar shows a URL from tanastaging.dentimax.com. The page title is "ARISU000 - Sunny Arizona". The main content is a "Patient Ledger" for "Tiffanye". The ledger table is as follows:

Sunny Arizona						
Date	Name	Procedure	Tx Area	Dx Codes	Amount	Balance
9/8/2025	Sunny	D7240 removal of impacted tooth - c	15		\$600.00	\$500.00
9/8/2025		PATCASH Patient Cash Payment			(\$100.00)	
9/8/2025	Sunny	D7210 extraction erupted tooth requi	3		\$300.00	\$300.00
9/2/2025	Sunny	D1110 prophylaxis - adult			\$0.00	\$0.00
9/2/2025	Sunny	D0274 bitewings - four radiographic i			\$0.00	\$0.00
9/25/2025		NOTE pre-deployment exam				
9/2/2025	Sunny	PATCHECK Patient Credit			(\$18.00)	(\$18.00)
9/2/2025	Sunny	D7240 removal of impacted tooth - c	1		\$1,000.00	\$800.00
9/25/2025		NOTE pre-deployment extraction				
9/2/2025		PATCHECK Patient Check Pymt			(\$200.00)	
8/19/2025	Sunny	D0330 panoramic radiographic imag			\$30.00	\$30.00
8/18/2025	Sunny	D7210 extraction erupted tooth requi	1		\$0.00	\$0.00
8/18/2025	Sunny	D2391 resin-based composite - one	18 O		\$290.00	\$232.00
9/2/2025		PATCHECK Patient Check Pymt			(\$58.00)	
8/18/2025	Sunny	D2392 resin-based composite - two	2 MO		\$350.00	\$280.00
9/2/2025		PATCHECK Patient Check Pymt			(\$70.00)	

15 Use the "gear" icon in the upper right corner to open Practice Setup

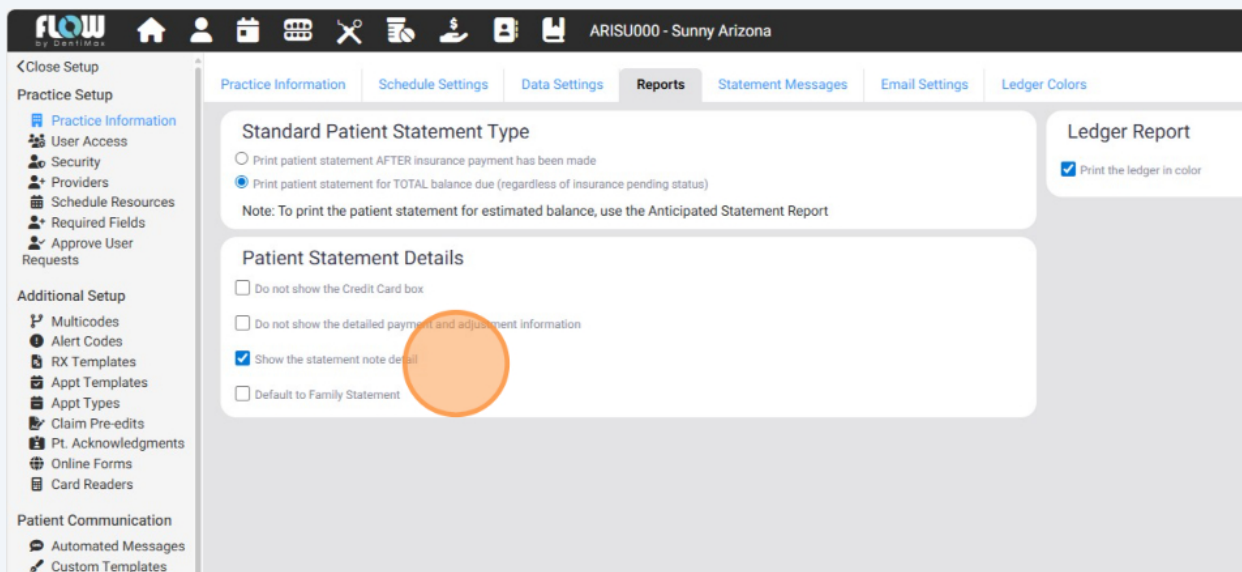
Click on the Reports tab



16 Make sure the box "Show the statement note detail" is checked.

If it is not marked; click the edit icon in the upper right corner and then check the box

Save changes



17

Go back and reprint the ledger and you will now have the ledger note showing; print as usual if needed

ARISU000 - Sunny Arizona

Patient Ledger
Tiffanye

Sunny Arizona

Date	Name	Procedure	Tx Area	Dx Codes	Amount	Balance
9/8/2025	Sunny	D7240 removal of impacted tooth - c	15		\$600.00	\$500.00
9/8/2025		PATCASH Patient Cash Payment			(\$100.00)	
9/8/2025	Sunny	D7210 extraction erupted tooth requi	3		\$300.00	\$300.00
9/2/2025	Sunny	D1110 prophylaxis - adult			\$0.00	\$0.00
9/2/2025	Sunny	D0274 bitewings - four radiographic i			\$0.00	\$0.00
9/25/2025		NOTE pre-deployment exam				
9/2/2025	Sunny	PATCHECK Patient Credit			(\$18.00)	(\$18.00)
9/2/2025	Sunny	D7240 removal of impacted tooth - c	1		\$1,000.00	\$800.00
9/25/2025		NOTE pre-deployment extraction				
9/2/2025		PATCHECK Patient Check Pymt			(\$200.00)	
8/19/2025	Sunny	D0330 panoramic radiographic imag			\$30.00	\$30.00
8/18/2025	Sunny	D7210 extraction erupted tooth requi	1		\$0.00	\$0.00
8/18/2025	Sunny	D2391 resin-based composite - one	18 O		\$290.00	\$232.00
9/2/2025		PATCHECK Patient Check Pymt			(\$58.00)	
8/18/2025	Sunny	D2392 resin-based composite - two	2 MO		\$350.00	\$280.00
9/2/2025		PATCHECK Patient Check Pymt			(\$70.00)	
8/18/2025	Sunny	D2393 resin-based composite - three	31 MOD		\$370.00	\$296.00
9/2/2025		PATCHECK Patient Check Pymt			(\$54.00)	
8/19/2025		PATCHECK Patient Check Pymt			(\$20.00)	