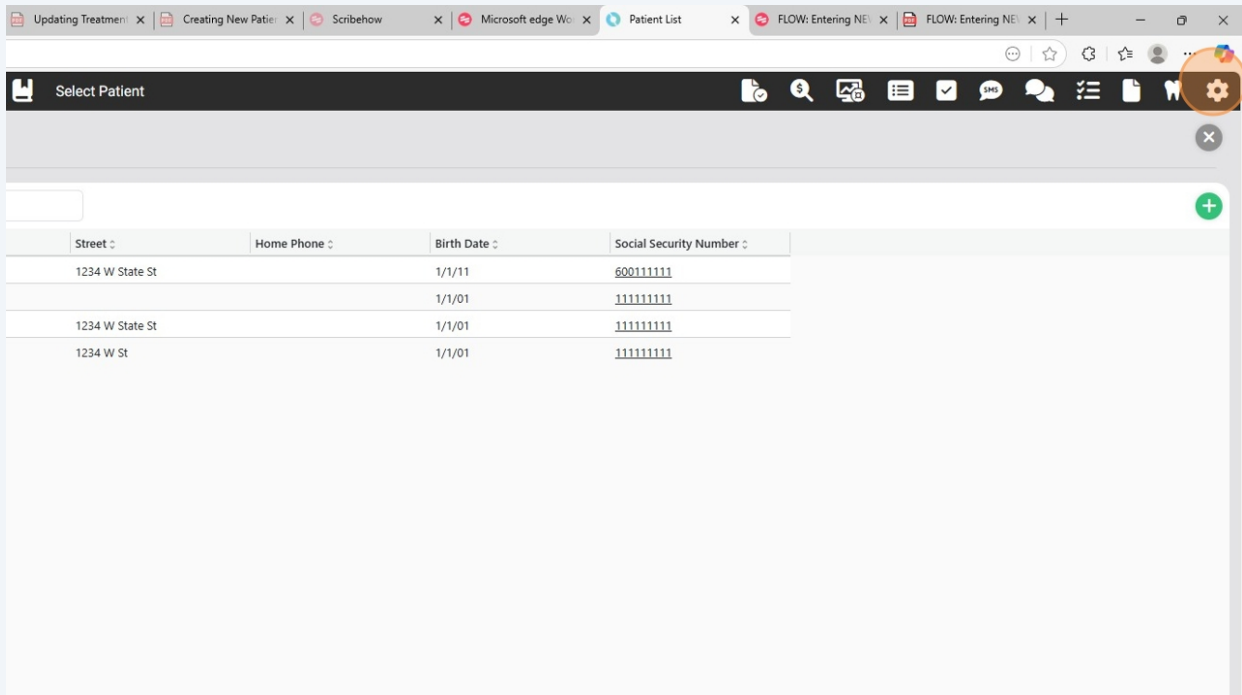


# FLOW: ADDING NEW ACCOUNTING CODE

1 From anywhere in FLOW:

Click on the "gear" icon to open Practice Setup



## 2 Click Setup

The screenshot shows a web browser window with several tabs. The active tab is 'Patient List'. The page title is 'Select Patient'. The main content area contains a table with the following data:

Street	Home Phone	Birth Date	Social Security Number
1234 W State St		1/1/11	600111111
		1/1/01	111111111
1234 W State St		1/1/01	111111111
1234 W St		1/1/01	111111111

A user profile dropdown menu is open in the top right corner, showing the following options: Practice Setup (highlighted), User: Tiffany Nichols, User Profile Settings, Account Settings, and Logout.

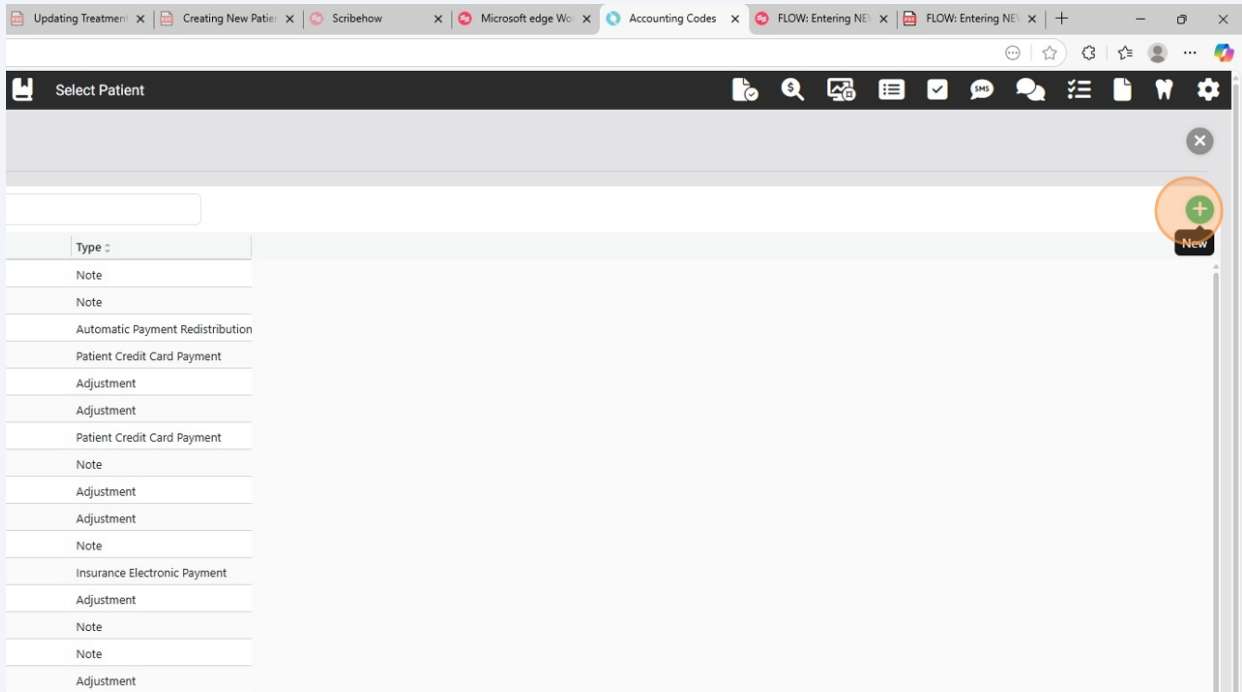
## 3 On the left menu bar select "Accounting Codes"

The screenshot shows a web browser window with the 'Accounting Codes' setup page. The left sidebar menu is visible, with 'Accounting Codes' selected. The main content area shows a form with the following fields:

- Street: 123546 NE
- Street 2: (empty)
- City: Gilbert
- State: AZ
- Postal Code: 85297
- Country: United States - US
- Phone 1: (800) 704-8494
- Phone 2: (empty)
- Fax: (empty)
- Bank Account: (empty)
- Default Area Code: (empty)
- Tooth System: JP

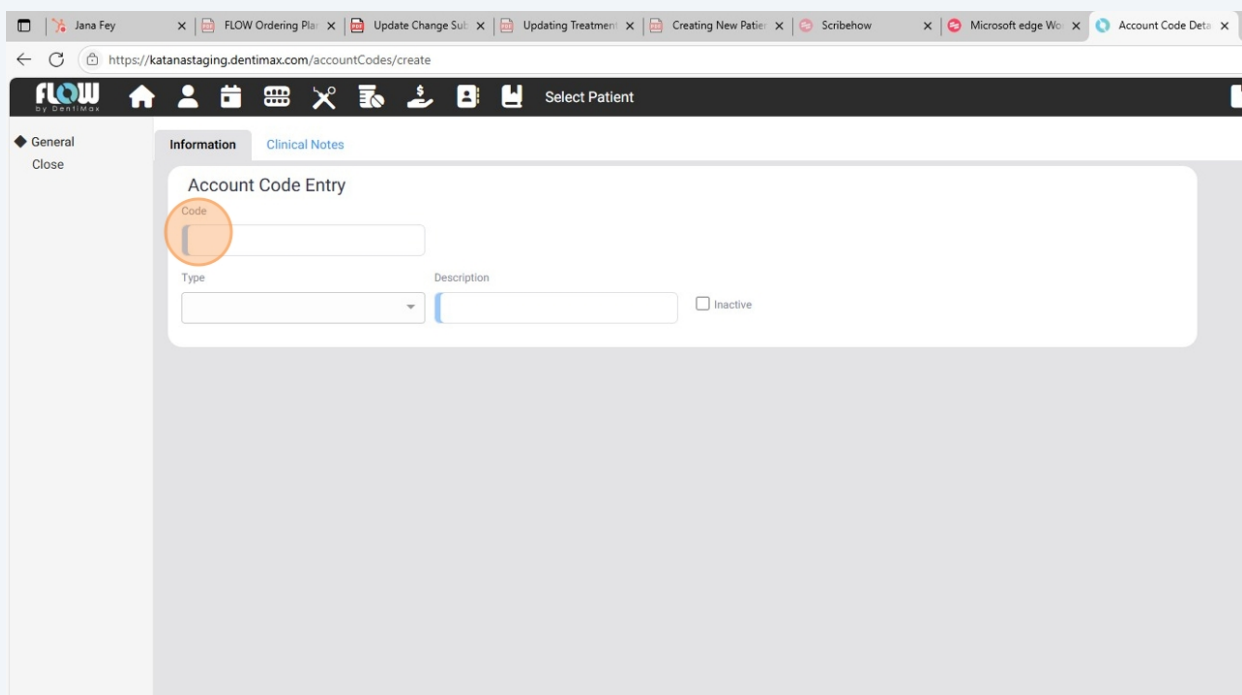
A tooltip is visible over the 'Accounting Codes' menu item, displaying the text 'Adjustment and payment codes'.

#### 4 Click the green + on the upper right



#### 5 Enter the code you would like to use

example: PTDBT



## 6 Select the type of Accounting Code from the drop-down menu

The screenshot shows the 'Account Code Entry' form in the FLOW by Dentimax system. The 'Code' field contains 'PTDBT'. The 'Type' field is a drop-down menu with a blue circle highlighting it. The 'Description' field is empty. There is an 'Inactive' checkbox.

## 7 This example would use Patient Credit Card Payment

The screenshot shows the 'Account Code Entry' form in the FLOW by Dentimax system. The 'Code' field contains 'PTDBT'. The 'Type' field is a drop-down menu with a list of options. 'Patient Credit Card Payment' is highlighted with a blue circle.

- Insurance Adjustment
- Patient Check Payment
- Patient Cash Payment
- Patient Credit Card Payment
- Patient Care Credit Payment
- Insurance Check Payment
- Insurance Electronic Payment
- Insurance Card Payment

## 8 Enter the full Description

Example: Patient Debit Card Payment

Account Code Entry

Code  
PTDBT

Type  
Patient Credit Card Payment

Description

Inactive

## 9 To Save Changes you have two options:

Click Save Changes from the left menu bar or

Account Code Entry

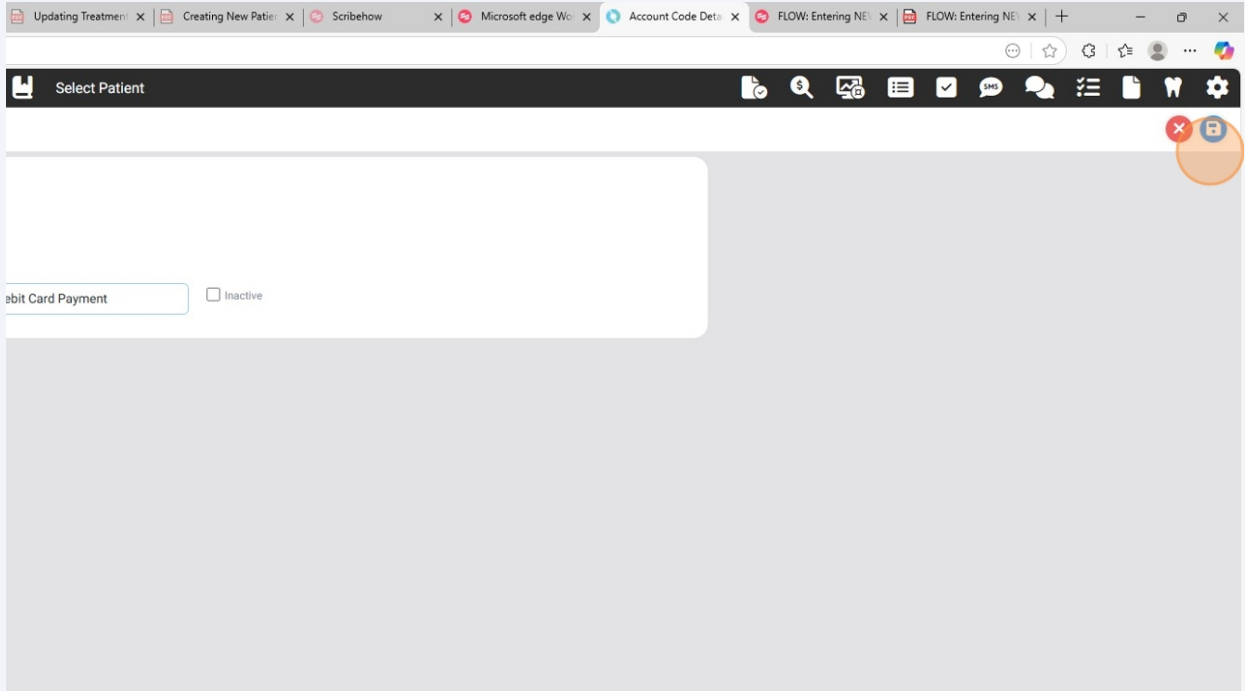
Code  
PTDBT

Type  
Patient Credit Card Payment

Description  
Patient Debit Card Payment

Inactive

## 10 Click the Save icon in the right corner



## 11 You will now see the Accounting Code available on the list

CODE	DESCRIPTION	TYPE
MAXUN	Insurance Denied due to Maximum Reached	Note
MAXDNL	Insurance Denied-Maximum Reached	Note
NCB	Insurance Denied-Not a covered benefit	Note
NCBDNL	Insurance Denied-Not a covered benefit	Note
NONDP	Insurance Denied-Non Duplication of Coverage	Note
NOTE	Ledger Note	Note
PATADJ	Adjustment	Adjustment
PATCARD	Patient Card Payment	Patient Credit Card Payment
PATCASH	Patient Cash Payment	Patient Cash Payment
PATCHECK	Patient Check Pymt	Patient Check Payment
PROCO	Professional Courtesy	Adjustment
PROCOURT	Professional Courtesy	Adjustment
PTDBT	Patient Debit Card Payment	Patient Credit Card Payment
PTDBT	Patient Debit Card Payment	Patient Credit Card Payment
REFDC	Referral Discount	Adjustment
REFDISC	Referral Discount	Adjustment
REFUND	Refund to Patient	Patient Check Payment
RESUB	Resubmission to Insurance	Note
RFI	Insurance Request for more information	Note
STMT	Statement Printed	Note
TAKEB	Insurance Takeback	Insurance Adjustment
TAX	Tax	Adjustment
TAX	Tax	Adjustment
TCRFR	Credit Transfer from patient	Adjustment
TCRTO	Credit Transfer to Patient	Adjustment

## 12 Close Setup

The screenshot displays the 'Accounting Codes' configuration page. The browser address bar shows the URL: <https://katanastaging.dentimax.com/setup/accountCodes>. The page title is 'Accounting Codes'. A search bar is located at the top of the table area. The table lists various accounting codes with their descriptions and types.

Code	Description	Type
MAXDN	Insurance Denied due to Maximum Reached	Note
MAXDNL	Insurance Denied-Maximum Reached	Note
NCB	Insurance Denied-Not a covered benefit	Note
NCBDNL	Insurance Denied-Not a covered benefit	Note
NONDP	Insurance Denied-Non Duplication of Coverage	Note
NOTE	Ledger Note	Note
PATADJ	Adjustment	Adjustment
PATCARD	Patient Card Payment	Patient Credit Card Payment
PATCASH	Patient Cash Payment	Patient Cash Payment
PATCHECK	Patient Check Pymt	Patient Check Payment
PROCO	Professional Courtesy	Adjustment
PROCCOURT	Professional Courtesy	Adjustment
PTDBT	Patient Debit Card Payment	Patient Credit Card Payment
PTDBT	Patient Debit Card Payment	Patient Credit Card Payment
REFDC	Referral Discount	Adjustment
REFDISC	Referral Discount	Adjustment
REFIND	Refund to Patient	Patient Check Payment