

# FLOW: How to add forwarded balance from previous software

1 You will need to create a service code

Click on the gear to open SETUP

The screenshot displays a web-based dashboard for a dental practice. The browser's address bar shows the URL 'TESTE000 - Teddy test'. The dashboard is divided into several sections:

- Daily Revenue Goal:** A progress bar showing a current value of \$0 and a target of \$0.00.
- Office Recall Percentage:** A card indicating 'No recalls set up'.
- Today's Tasks:** A card indicating 'No tasks today'.
- Practice Stats (YTD):** A section with a pie chart and several metrics:
  - Patients Seen: 2
  - New patients: 0
  - Services Provided: 9
  - Completed Appointments: 4
  - Missed Appointments: 0
  - Unscheduled Treatment: 0Two circular gauges show '0% New Patients' (Total: 0) and '100% Existing Patient...' (Total: 2).
- Common Reports:** A section with a list icon.
- Helpful Resources:** A section with a list icon.
- Insurance Management:** A section with a list icon.

A gear icon in the top right corner of the dashboard is highlighted with a red circle, indicating where to click to open the SETUP menu.

## 2 Click Setup

The screenshot shows a web application dashboard for a dental practice. The browser address bar indicates the user is logged in as 'User: Tiffany Nichols'. The dashboard includes several widgets:

- Daily Revenue Goal:** Shows a current revenue of \$0 and a target of \$0.00.
- Office Recall Percentage:** Shows 'No recalls set up'.
- Today's Tasks:** Shows 'No tasks today'.
- Practice Stats (YTD):** Displays a bar chart for appointment types and two circular gauges for 'New Patients' (0%) and 'Existing Patient...' (100%).
- Common Reports, Helpful Resources, and Insurance Management:** Each with a list icon.

A 'Practice Setup' menu is highlighted in the top right corner, listing options: 'User: Tiffany Nichols', 'User Profile Settings', 'Account Settings', and 'Logout'.

## 3 On the left menu at the bottom click Service Codes

The screenshot shows the 'Service Codes' setup page. The left-hand navigation menu includes sections for 'Additional Setup', 'Patient Communication', 'Patient Portal', and 'Accounting Setup'. The 'Service Codes' option under 'Accounting Setup' is highlighted with a tooltip that says 'Service and charge codes'.

The main content area contains 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

The browser address bar shows the URL: <https://xatanastaging.dentimax.com/setup/serviceCodes>.



## 6 Select code type

Account Code Entry

Code  
Dbal

Type Description  Inactive

## 7 Click Fee for Service

Account Code Entry

Code  
Dbal

Type Description  Inactive

- Fee for Service
- Other Fee
- Outside Lab Fee
- Inside Lab Fee
- Adjustment
- Automatic Payment Redistribution
- Insurance Adjustment

## 8 Enter description of code: Dentrix Balance Forwarded

The screenshot shows the 'Account Code Entry' form in a web browser. The 'Code' field contains 'Dbal'. The 'Type' dropdown is set to 'Fee for Service'. The 'Description' field is empty and highlighted with an orange circle. The 'Service Category' dropdown is set to 'Type to search'. The 'Treatment Area' dropdown is empty. There are also fields for 'Abbreviation', 'Code 2', 'Code 3', and 'Code 4'. At the bottom, there are checkboxes for 'Taxable', 'Inactive', 'Recall Transaction', 'Use Assigned Hygienist for this service', and 'Do Not Bill Insurance'.

## 9 You do not need to add a service category

The screenshot shows the 'Account Code Entry' form in a web browser. The 'Code' field is empty. The 'Type' dropdown is set to 'Fee for Service'. The 'Description' field contains 'Dentrix Balance Forwarded' and is highlighted with an orange circle. The 'Service Category' dropdown is set to 'Type to search'. The 'Treatment Area' dropdown is empty. There are also fields for 'Abbreviation', 'Code 2', 'Code 3', and 'Code 4'. At the bottom, there are checkboxes for 'Taxable', 'Inactive', 'Recall Transaction', 'Use Assigned Hygienist for this service', and 'Do Not Bill Insurance'.

## 10 For treatment area select Mouth

The screenshot shows a web application interface for creating a service code. The page title is "TESTE000 - Teddy test". The main form has the following fields:

- Description: **Dentrix Balance Forwarded**
- Service Category: Type to search
- Treatment Area: **Mouth** (selected from a dropdown menu)
- Code 2: [Empty]
- Code 3: [Empty]
- Appointment Length (Minutes): [Empty]
- Checkboxes: Taxable, Inactive, Recall Transaction, Use Assigned Hygienist for this service, Do Not Bill Insurance

The "Treatment Area" dropdown menu is open, showing the following options: Surface, Tooth, Root, Mouth (highlighted), Quadrant, Sextant.

## 11 Click "Save Changes"

The screenshot shows the "Account Code Entry" form in the web application. The page title is "TESTE000 - Teddy test". The form has the following fields:

- Code: **Dbal**
- Type: **Fee for Service**
- Description: **Dentrix Balance Forwarded**
- Service Category: Type to search
- Treatment Area: **Mouth**
- Abbreviation: [Empty]
- Code 2: [Empty]
- Code 3: [Empty]
- Code 4: [Empty]
- Appointment Length (Minutes): [Empty]
- Checkboxes: Taxable, Inactive, Recall Transaction, Use Assigned Hygienist for this service, Do Not Bill Insurance

The left sidebar contains the following options: General, **Save Changes** (highlighted), Cancel Changes.

## 12 Go to selected patient's ledger

The screenshot shows the 'Service Codes' page in the Flow by Dentimax software. The left sidebar contains a navigation menu with categories like 'Practice Setup', 'Additional Setup', 'Patient Communication', and 'Patient Portal'. The 'Teddy's Ledger' option is highlighted in the sidebar, and a dropdown menu is open over it, showing options like 'Selected Patient', 'Teddy's Info', 'Teddy's Chart', 'Teddy's Ledger', 'Teddy's Perios', 'Teddy's Prescriptions', 'Change Selected Patient', and 'Clear Selected Patient'. The main content area displays a table of service codes with columns for Code, Description, and Amount.

Code	Description	Amount
00112	Comp Exam Child	
11111	Cigna Upgrade Fee	
125	Perio Chart	\$0.00
130	Chart Patient / HH	\$0.00
2123	Omni Products	\$0.00
22222	EDS Lab Fee	\$0.00
2323	Bleach Tray Impressions	\$0.00
5006	adjustment	\$0.00
6999	unspecified fixed prosthodontic procedure by repor	\$0.00
9431	Office Visit	\$0.00
C0001	Cracked Tooth	\$0.00
C0002	Impacted Mesial	\$0.00
C0003	Impacted Distal	\$0.00
C0004	Abcess	\$0.00
C0005	Watch Tooth	\$0.00
C0006	Hypersensitive	\$0.00

## 13 Click "New Transaction"

The screenshot shows the 'Ledger' page in the Flow by Dentimax software. The left sidebar contains a navigation menu with categories like 'General', 'Transactions', 'Patient Info', 'Claim Info', and 'Print'. The 'New Transaction' option is highlighted in the sidebar. The main content area displays the 'Ledger' page for patient 'test, Teddy - TESTE000'. It includes a 'Billing Information' section with insurance details and a table for transactions.

Insurance	Est Due	Charges:
Ins 1: Aetna	\$0.00	Adjustments:
Ins 2: None	\$0.00	Ins Pmts:
HOH: test, Teddy	\$0.00	Patient Pmts:
		Total:
		Current
		\$0.00

Date	Note	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj
No data to display														

## 14 Enter the new code just created: DBAL

**Charge Detail**

**Details**

Patient: test, Teddy - TESTE000 | Date: 08/06/2025 | Billing: 6, 8/5/25 | Provider: Nichols, Tiffanye - NIC00 | Status: Comp

Account Code: dba (selected) | Description: | Tooth: | Fee:

**Claim & Billing Info**

Place of Service: Office | Unit of Time: |  Do Not Bill Insurance |  Do Not Bill Patient |  Insurance 1 Completed Payment |  No Insurance 2

**Diagnosis**

Diagnosis 1 |  Diagnosis 2 |  Diagnosis 3 |  Diagnosis 4

## 15 Enter the amount of the previous balance to be added to the account

**Charge Detail**

Date: 08/06/2025 | Billing: 6, 8/5/25 | Provider: Nichols, Tiffanye - NIC00 | Status: Completed

Description: Dentrix Balance Forwarded | Fee: \$0.00 |  Follow Up

**Diagnosis**

Diagnosis 1 |  Diagnosis 2 |  Diagnosis 3 |  Diagnosis 4

**Estimated Responsibility**

Override Estimate | Insurance 1: | Insurance 2:

## 16 Click "Save Changes"

The screenshot shows the 'Charge Detail' form for patient 'test, Teddy - TESTE000'. The 'Details' section includes fields for Patient, Date (08/06/2025), Billing (6, 8/5/25), Provider (Nichols, Tiffanye - NIC00), and Status (Comp). The Account Code is 'Dbal - Dentrinx Balance Forwarded' and the Description is 'Dentrinx Balance Forwarded'. The Fee is set to 2000, and the 'Follow Up' checkbox is unchecked. The 'Claim & Billing Info' section shows 'Office' as the Place of Service and 'Unit of Time' as empty. The 'Diagnosis' section has four empty fields. The left sidebar contains buttons for 'General', 'Save Changes' (highlighted), 'Save and New', and 'Cancel Changes'.

## 17 You will now see the forwarded balance on the patients account

The screenshot shows the patient account summary for 'test, Teddy'. The 'Billing Information' section displays a table with the following data:

Insurance	Est Due	Charges:	Primary	Individual
Ins 1: Aetna	\$0.00	\$2,000.00	Balance	\$2,000.00
Ins 2: None	\$0.00	Adjustments: \$0.00	Std Ded	\$0.00/\$0.00
HOH: test, Teddy	\$2,000.00	Ins Pmts: \$0.00	Prv Ded	\$0.00
		Patient Pmts: \$0.00	Other Ded	\$0.00
		Total: \$2,000.00	Ins 1 Used	\$0.00
			Ins 1 Max	\$1,000.00

Summary of Current Balances:

Current	30 Days	60 Days	90+ Days
\$2,000.00	\$0.00	\$0.00	\$0.00

The table below shows the transaction details:

Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Inst Paid	Ins2 Paid	Collections In Date	Collections Phase
6	Dbal	Dentrinx Balance Forwarded	NIC00			\$2,000.00	Completed	\$0.00				\$2,000.00				

18 To add a payment to the forwarded balance

From ledger Click "New Pat Payment/Adj"

The screenshot shows the 'Ledger' page for patient 'test, Teddy - TESTE000'. The left sidebar has a menu where 'Enter a Payment' is expanded, and 'New Pat Payment/Adj' is highlighted with an orange circle. The main area shows a table with one transaction:

Date	Note	Name	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj
8/6/25		Teddy	6	Dbal	Dentrix Balance Forwarded	NIC00			\$2,000.00	Completed		\$0.00		

19 Enter the total payment information: type of payment and amount

The screenshot shows the 'Payment Amounts' form. The 'Total Payment' field is highlighted with an orange circle. The form contains the following information:

- Payment Date: 08/06/2025
- Payment Code: PATCHECK - Patient Check Pymt
- Adjustment Code: PATADJ - Adjustment
- Patient Estimate Due: \$2,000.00
- Account Balance: \$2,000.00
- Distributed Payment: \$0.00
- Total Payment: (field highlighted with orange circle)
- Total Adjustment: \$0.00
- Check/Payment Number: (field)
- Buttons: Pay Amount, Process Card
- Options: Force CC Payment, Save Card Info

Below the form is a table with the following data:

Tooth	Surface	Provider	Fee	Ins Est	Ins Adj	Ins Paid	Pat Est	Pat Adj	Pat Paid	Balance	Ins Due	Pat Due	Pmt Tdy	Adj Tdy
		NIC00	\$2,000.00				\$2,000.00			\$2,000.00		\$2,000.00		

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Apply the payment amount to the selected procedure

Financial summary and ledger table.

Financial Summary:

- Patient Estimate Due: **\$2,000.00**
- Account Balance: **\$2,000.00**
- Distributed Payment: **\$150.00**
- Total Payment: **\$150.00**
- Total Adjustment: **\$0.00**

Buttons: Pay Amount, Process Card, Force CC Payment, Save Card Info.

Tooth	Surface	Provider	Fee	Ins Est	Ins Adj	Ins Paid	Pat Est	Pat Adj	Pat Paid	Balance	Ins Due	Pat Due	Pmt Tdy	Adj Tdy
		NIC00	\$2,000.00				\$2,000.00			\$2,000.00		\$2,000.00	-\$150.00	
			\$2,000.00	\$0.00	\$0.00	\$0.00	\$2,000.00	\$0.00	\$0.00	\$2,000.00	\$0.00	\$2,000.00	-\$150.00	\$0.00

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Click "Save Changes"

Flow by Dentimax Patient Payment Entry interface.

Navigation: General, **Save Changes**, Cancel Changes.

Payment Info:

- Patient: test, Teddy - TESTE000
- Only Charges At: All facilities
- Hide Zero Balance Charges:
- Hide Pending Ins Charges:
- Hide Items With Credit Balance:
- Show Family Charges:
- Show Only Today's Charges:
- Only Show Billing:

Payment Amounts:

- Payment Date: 08/06/2025
- Payment Code: PATCHECK - Patient Check Pymt
- Patient Estimate Due: **\$2,000.00**
- Account Balance: **\$2,000.00**
- Distributed Payment: **\$150.00**
- Total Payment: **\$150.00**
- Check/Payment Number: [Field]

Patient Charges Table:

Date	Name	Billing	Code	Tooth	Surface	Provider	Fee	Ins Est	Ins Adj	Ins Paid	Pat Est	Pat Adj	Pat
8/6/25	Teddy	6	Dbal			NIC00	\$2,000.00				\$2,000.00		

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This payment will be listed under the balance forwarded amount

### Save Changes

Sort by Date

Ins 1:	Aetna	\$0.00	Adjustments:	\$0.00	Balance	\$1,850.00
Ins 2:	None	\$0.00	Ins Pmts:	\$0.00	Std Ded	\$0.00/\$0.00
HOH:	test, Teddy	\$1,850.00	Patient Pmts:	-\$150.00	Prv Ded	\$0.00
			Total:	\$1,850.00	Other Ded	\$0.00
					Ins 1 Used	\$0.00
					Ins 1 Max	\$1,000.00

Current	30 Days	60 Days	90+
\$1,850.00	\$0.00	\$0.00	\$0.00

  

line	Billing	Code	Description	Provider	Tooth	Surface	Amount	Status	Ins Pd	Pat Pd	Ins Adj	Pat Adj	Bal	Inst Paid	Ins2 Paid	Collections In Date	Collections Pha
1	6	Dbal	Dentrix Balance Forwarded	NIC00			\$2,000.00	Completed	\$0.00	-\$150.00			\$1,850.00			<input checked="" type="checkbox"/>	
2	6	PATCHECI	Patient Check Pymt	NIC00			-\$150.00	Completed									

Complete payment of \$150.00 made on 8/6/25.