

Practice Success



Collect Payment Faster with Online Patient Payments

Presented by Kelly Harper



1

Webinar Controls



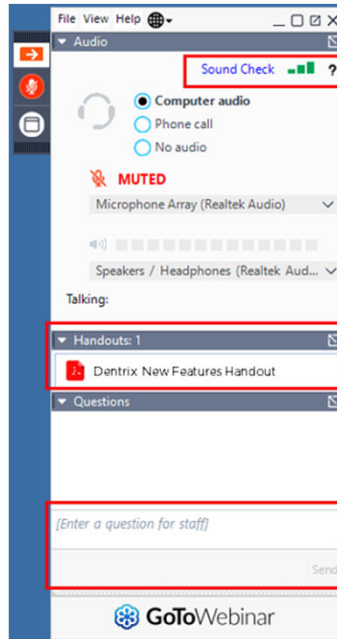
Use the Sound Check to test your audio for the webinar



Click the PDF link to download the webinar handout



To ask a question, type your question in the box



2



Today's Presenter: Kelly Harper

- Over 30 years of experience working in the dental industry
- 16 years as Dentrrix Certified trainer, 10 years as eServices trainer
- Provides practices across the US with a well-rounded training experience
- Passionate about training on Henry Schein products

3

Make It Easy for Patients to Pay

- Healthy cash flow is fundamental to keep your practice open and functioning well
- Timely collections is a big part of that
- Ideally, patients would pay the full amount at time of service—but that's not always possible
- If you must bill a patient, make it as easy for them to pay as possible



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Give Patients Payment Options

- Give patients payment options that fit their lifestyle
- They pay other bills online—they want to pay your bill that way too
- If patients can't pay immediately after seeing their statement, there's a good chance they'll forget about it
- QuickBill Premium gives patients the option to pay online anytime, anywhere



5

What Can I Do with QuickBill Premium?

In this webinar we'll discuss:

- Sending Billing Statement Emails and Texts
- Viewing Email Statements from the Patient's Perspective
- Processing Online Payments
- Tracking Statement History

6



Send Statement Emails and Texts

7

Problem: Patients Aren't Aware of Balances They Owe

- Insurance has paid, but there is a remaining balance
- Patients paid an estimated amount up front, due still owe a balance
- Patients don't answer phone calls or check their postal mail regularly for statements
- Patients on payment plans have payments that are due



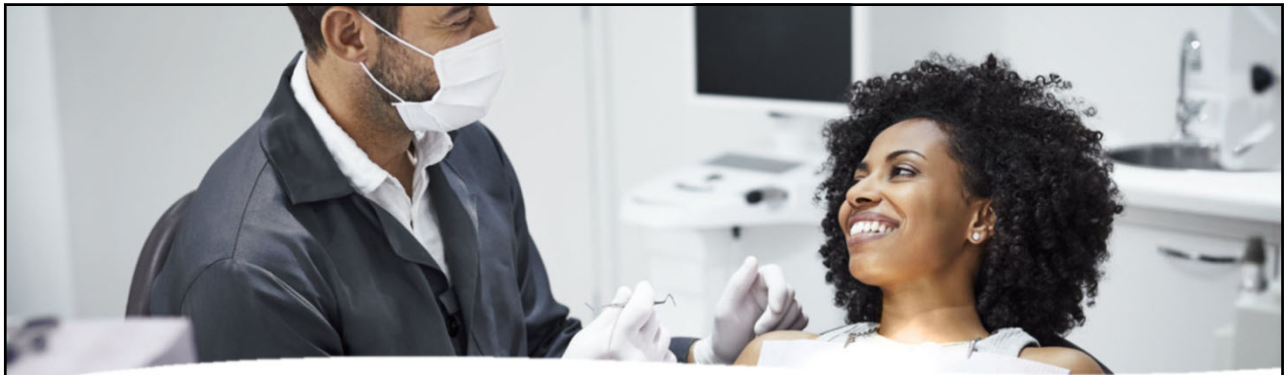
8



Solution: Allow Patients to Pay Online

- Patients always have their phones
- Not everybody checks the mail every day, but they check their email and texts several times a day
- Patient pay other bills online, why not their dental bill
- Give them the option to pay right now from their phone

9

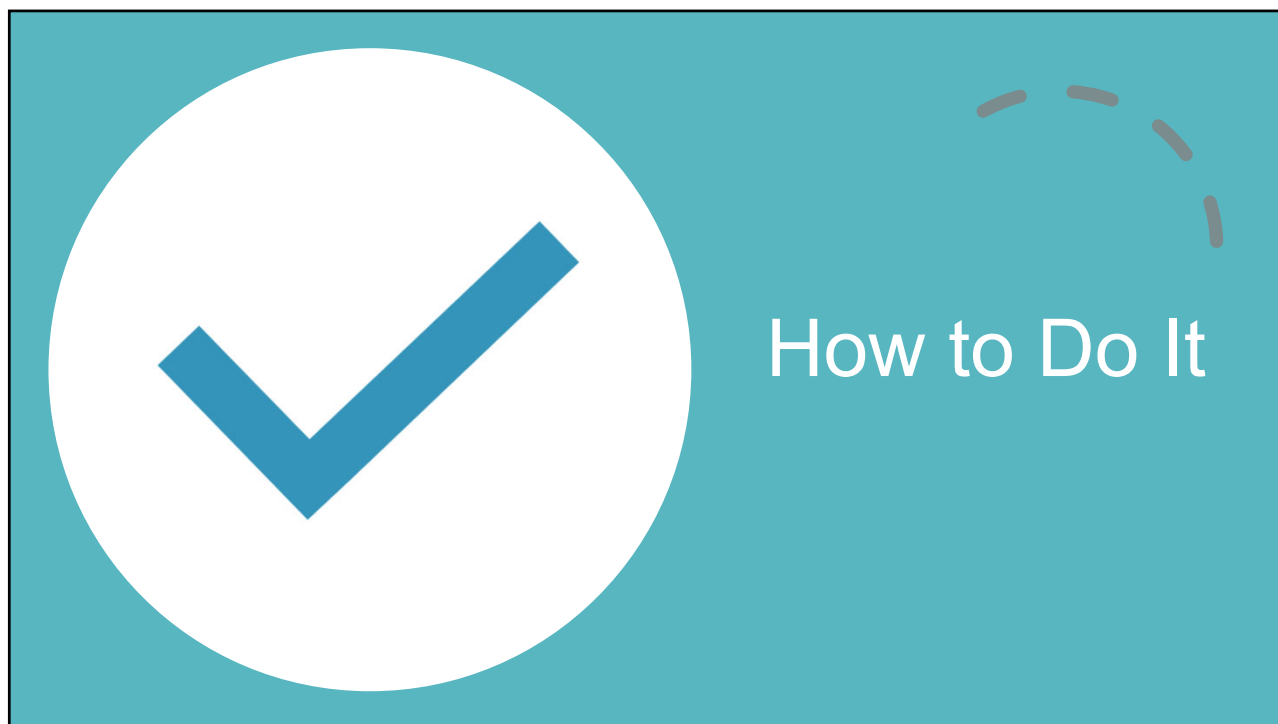


Example:

- A patient came in for an extensive treatment plan.
- She paid her estimated payment amount at time of service but knew she would meet her insurance maximum with a balance.
- She asked you to bill her for the amount she owed.

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10



11

Setting Up Statement Options

The screenshot shows the "Batch Processor" window in Dentrix Office Manager. The window title is "Dentrix Office Manager - Dentrix Dental Practice". The menu bar includes "File", "Reports", "Letters & Custom Lists", "Maintenance", "Analysis", and "Help". The toolbar contains various icons for file operations and printing. The main area displays a table with the following data:

Date	Description	Status
03/25/2022	Operator Appointment List	Printed
03/25/2022	Aging Report	Printed
03/25/2022	Birthday List	Displayed
03/25/2022	Prim Dent Ins: [IX-2012] Brown, Mary-Ameikas	Not Sent
03/25/2022	Sec Dent Ins: [IX-2012] Gleason, Gay N-Guardian	Not Sent

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12

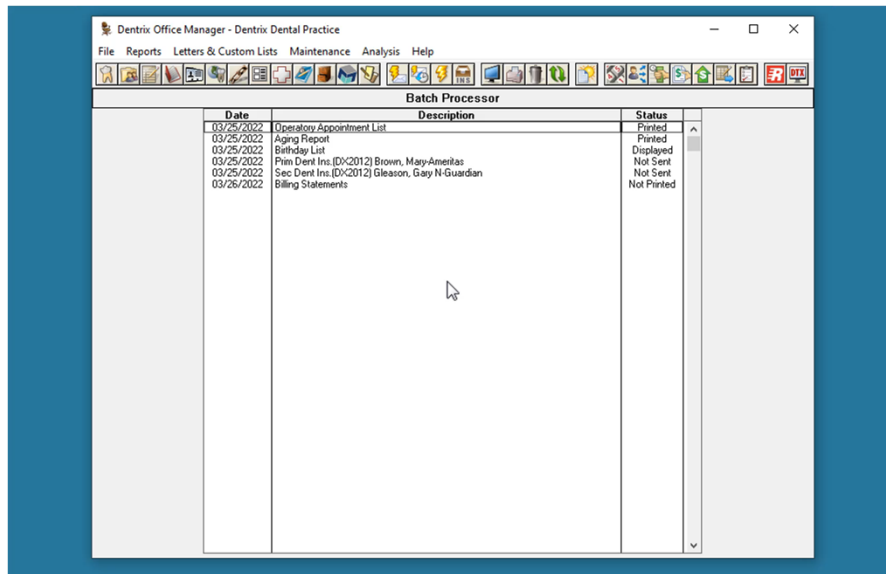
Tip: Move the **Balance Forward Date** back a few months so patients can see a history of treatment and payments.

Tip: Include procedures that are attached to a pending claim so patients can see what has been billed to insurance.

Setting Up Statement Options

1. In the Office Manager, click **Maintenance > Practice Setup > Preferences**.
2. Click the **Print Options** tab.
3. Check **Verify Billing Statements to Send** and **Copy Billing Statements to Document Center**.
4. Generate statements as you normally would.

Verifying Statements to Send



Date	Description	Status
03/25/2022	Operator Appointment List	Printed
03/25/2022	Aging Report	Printed
03/25/2022	Birthday List	Displayed
03/25/2022	Prim Dent Ins [D\C2012] Brown, May-Ameritas	Not Sent
03/25/2022	Sec Dent Ins [D\C2012] Gleason, Gay N-Guardian	Not Sent
03/26/2022	Billing Statements	Not Printed

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15

Verifying Statements to Send

Guarantors appear in the Verify Statements to Send window based on your previous Statement Options.

1. Preview how the statement will look when send by mail or electronically by email or text message.
2. Check the option(s) for how the statement will be delivered: mail, email, and/or text.
3. Update missing patient information as needed:
 - Email address
 - Mobile #
 - Consent to received text messages
4. Click Send.

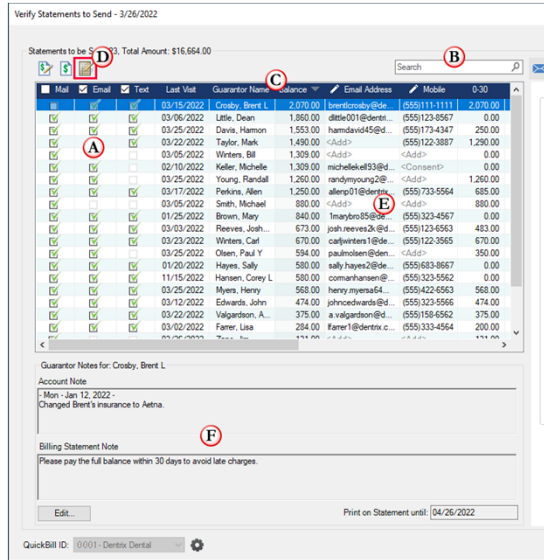
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16

Verifying Statements to Send – Things To Remember

- Select statement delivery method(s)
- Search for names, email addresses, or phone numbers in the list
- Sort columns of information
- Select an account and click Ledger button to see account details
- Add missing email addresses or mobile numbers
- Add or edit Guarantor Note or Billing Statement Note



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17

Tip: Set Preferred Statement Delivery Method

- Set a preferred delivery method for each guarantor
- If you make changes in the Verify Statements window, Dentrix will update this field to reflect that change

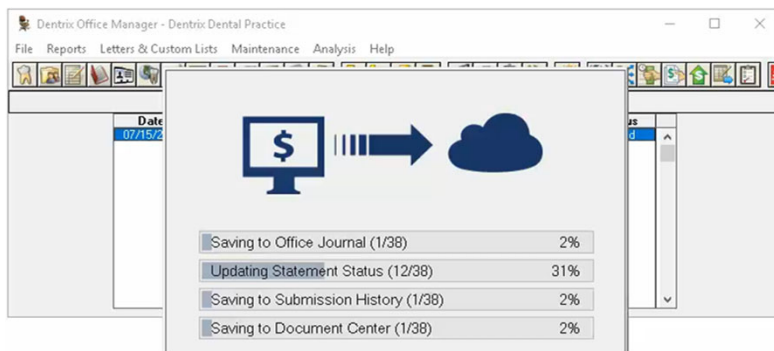
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18

Sending Statements

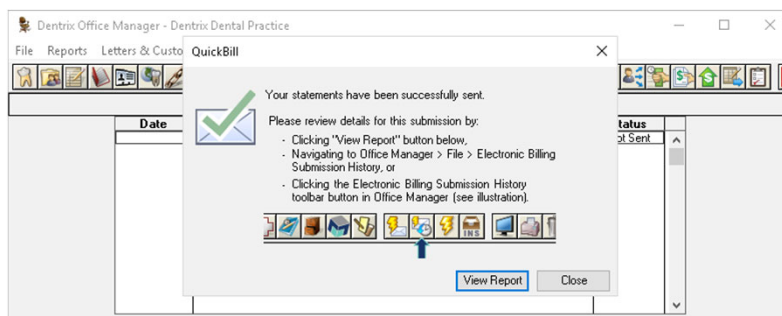
Statements will be sent to the clearinghouse to be printed and mailed, emailed, or texted to patients, depending on your settings.



Sending Statements

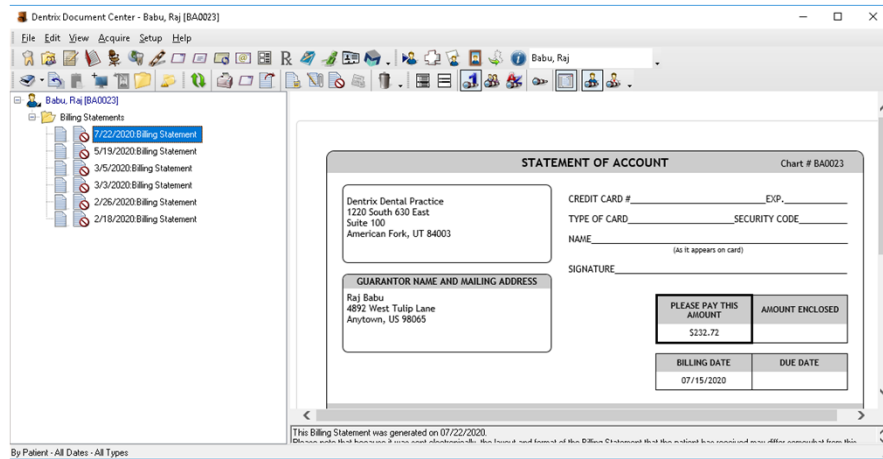
When statements are sent, you'll see a pop-up to view the statement report.

We will discuss this later in the webinar.



Sending Statements

A copy of the statement will be added to the guarantor's Document Center (when that option is selected during setup).



Questions about what we've covered so far?

Resources for Additional Information



Video: [Setting Up QuickBill and QuickBill Preferences](#)



Video: [Generating Billing Statements in the Office Manager](#)



Video: [Verifying and Sending Billing Statements Electronically](#)



Blog Post: [Use QuickBill Premium to Send Statements Via Mail, Email, or Text](#)



Article: [5 Reasons You Should Be Sending Text and Email Billing Statements](#)

23



What it Looks Like for Patients

24

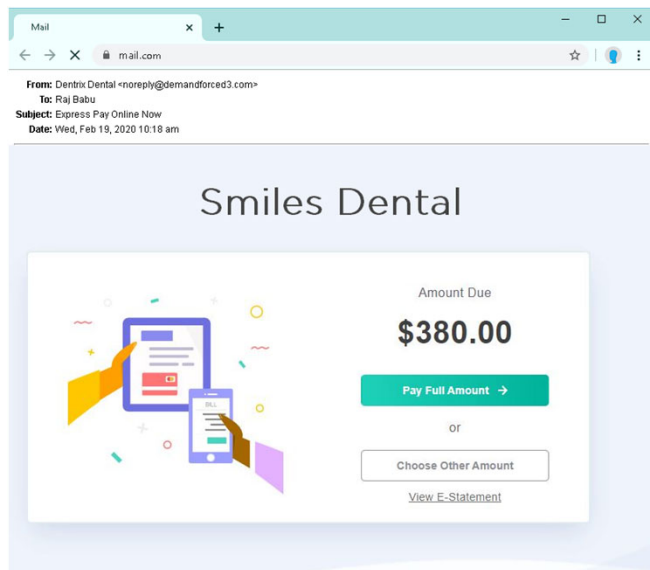
Emailed Statements



25

Receive the Email

- Patients will receive an email from your practice
- Email will include links to view their statement and pay online



26

Click the Link to View Statements

- Patients are asked to verify their name and birthdate
- Once verified, their statement is displayed

Verify your identity
Please verify your identity below.

The name and date of birth entered should be for the guarantor or individual with financial responsibility for the account corresponding to this E-Statement.

First Name *

Last Name *

Date of Birth *

NEXT >

STATEMENT OF ACCOUNT Chart # BA0023

Dentrix Dental Practice
1220 South 630 East
Suite 100
American Fork, UT 84003

CREDIT CARD # _____ EXP. _____
TYPE OF CARD _____ SECURITY CODE _____
NAME _____ (As it appears on card)
SIGNATURE _____

GUARANTOR NAME AND MAILING ADDRESS
Raj Babu
4892 West Tulip Lane
Anytown, US 98065

PLEASE PAY THIS AMOUNT \$332.72	AMOUNT ENCLOSED
BILLING DATE 07/15/2020	DUE DATE

TO ENSURE PROPER CREDIT, PLEASE DETACH AND RETURN THIS PORTION OF THE STATEMENT WITH YOUR PAYMENT

PLEASE RETAIN THIS PORTION OF THE STATEMENT FOR YOUR RECORDS

DATE	DESCRIPTION	PATIENT NAME	AMOUNT	BALANCE
15 Jun 2020	Balance Forward			372.72
Charges over 90 days past due.				
BALANCE 0-30 DAYS	BALANCE 30-60 DAYS	BALANCE 60-90 DAYS	BALANCE 90+ DAYS	TOTAL BALANCE
\$0.00	\$0.00	\$0.00	\$372.72	\$372.72
				ESTIMATED INSURANCE
				\$140.00
				PATIENT PORTION
				\$232.72

Statement Message
Dentrix Dental Practice - 1220 South 630 East Suite 100 - American Fork, UT 84003 - (801)763-9300



27

Make the Payment

Smiles Dental

Amount Due
\$380.00

Pay Full Amount →

or

Choose Other Amount

[View E-Statement](#)

Dentrix Dental
1200 S 630 E American Fork, UT (801) 555-4031

*Card Number: 0000-0000-0000-0000
*Expiration: March 2023
CVV: 555
Amount: \$372.72
Name: Raj Babu
Address: 483 N Main St.
City: Anytown
State: US
Zip: 10101
Email: RBabu@myemail.com
Phone: (801) 555-4891

Pay Now

- Patients can pay the full amount or choose a different amount
- Both payment links open a web page to enter their payment information



28

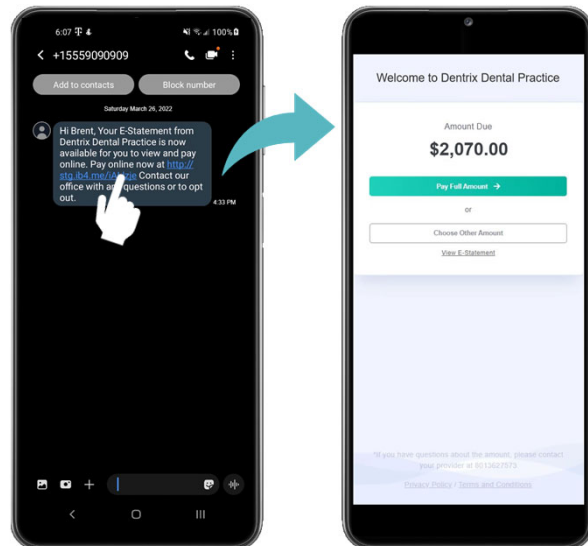
Text Message Statements



29

Receive the Text Message

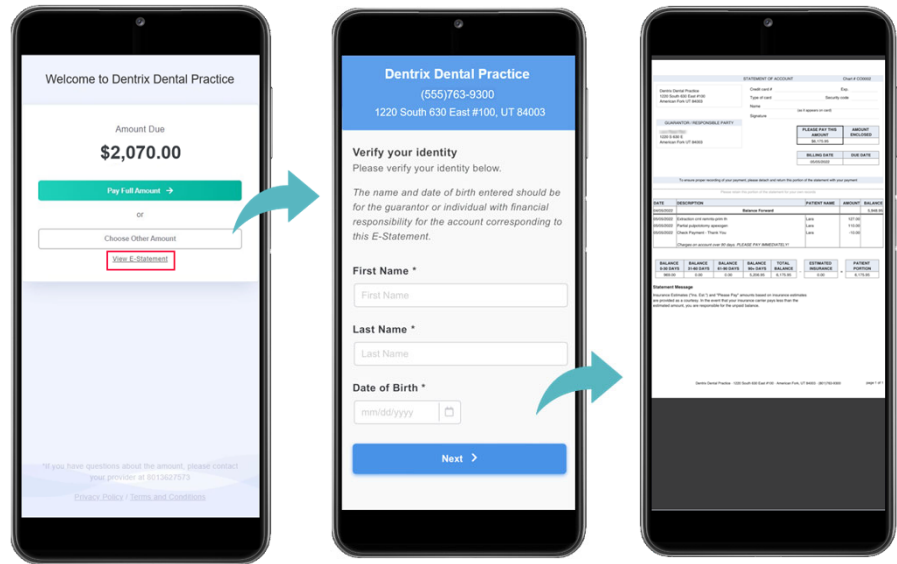
- Patients will receive a text from your practice
- Text includes link to view their statement and pay online
- Patients click the link to view their amount due



30

View the Statement

- Patients can click a link to view their statement and are prompted to verify their identity.
- Once verified, their statement is shown.



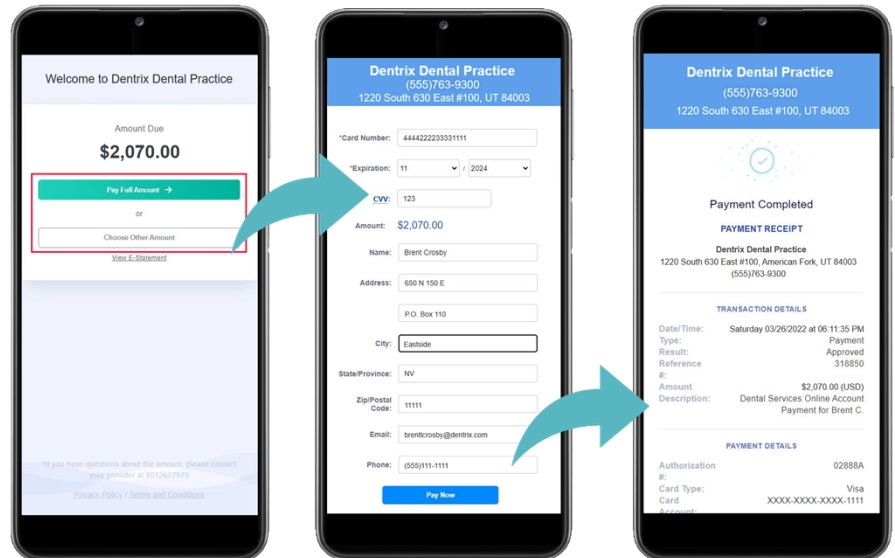
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31

Make the Payment

- Patients can pay the full amount or choose a different amount
- Both payment options open a web page where patient's can enter their credit card information and submit payment



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32



Questions?



Processing Online
Payments

Problem: Patients Make Payments 24/7

- Patients are making payments after hours, overnight, and over the weekend
- You may not be in the office when a payment is processed
- You need to know who paid, when, and how much



35



Solution: Process Payments Manually or Automatically

- Choose to process payments automatically
- Choose to be notified of payments and have the option to post them in the Ledger
- Manage online payments inside the Ledger just like any other payment

36

Example:

- A patient paid her full amount due online.
- Her amount due included balances for her and her son.
- You need to post the payment and split it so that it is applied to both accounts.



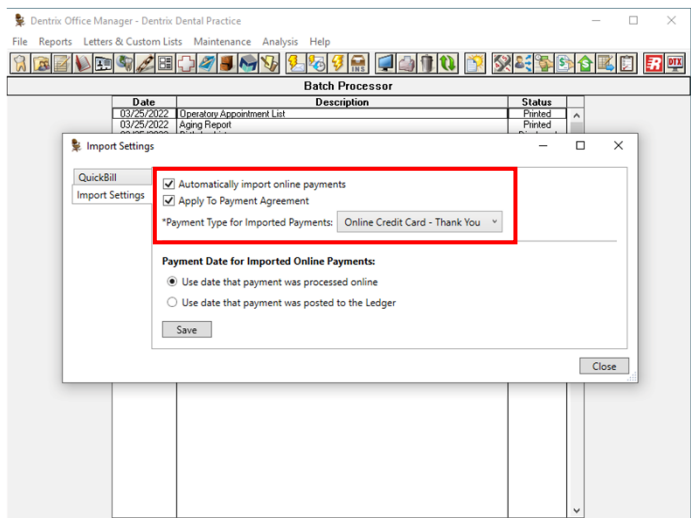
37



38

Import Payments Automatically

1. In the Office Manager, select **Maintenance > Practice Setup > Import Payment Settings**.
2. Select **Automatically Import Online Payments**
3. Under **Payment Type for Imported Payments**, select the payment type that online payments should be posted as in the Ledger.



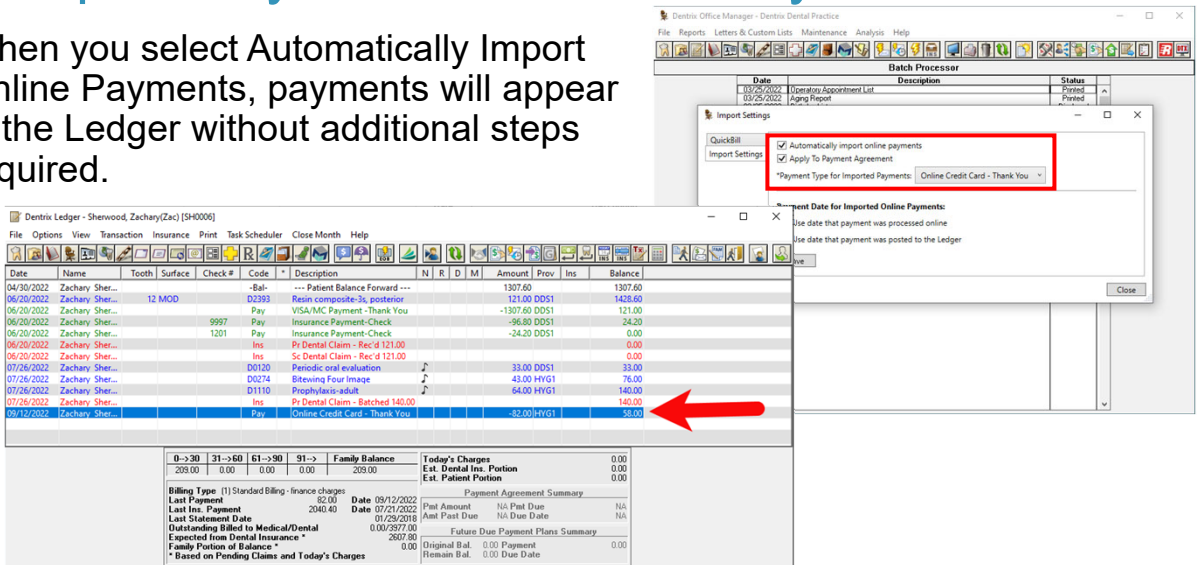
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39

Import Payments Automatically

When you select Automatically Import Online Payments, payments will appear in the Ledger without additional steps required.



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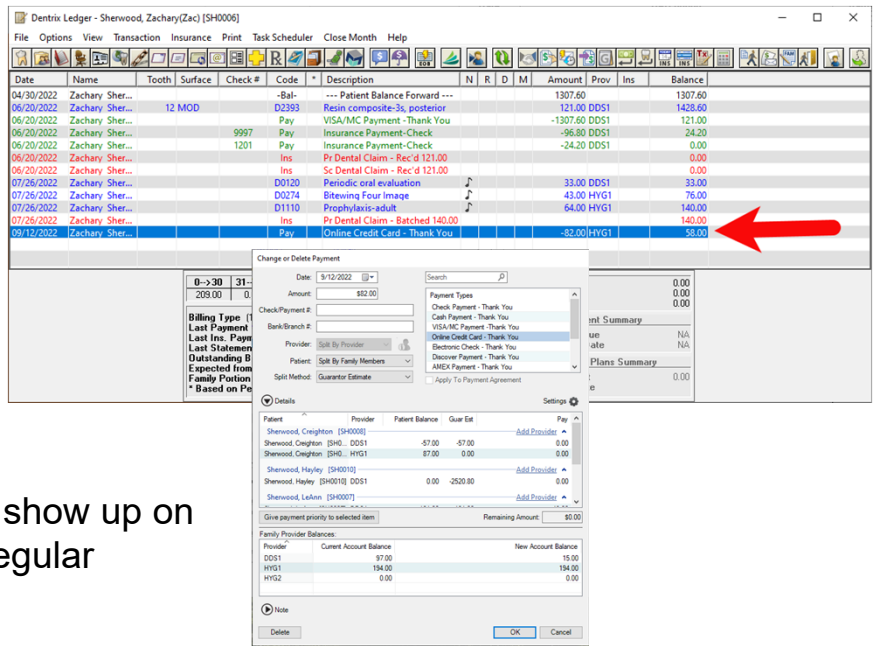
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40

Payments posted automatically are just like any other payment you enter manually.

Double-click the payment to edit, split, or reallocate as needed.

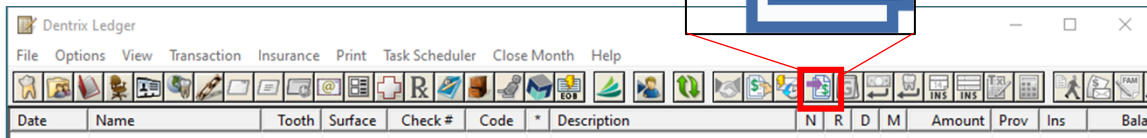
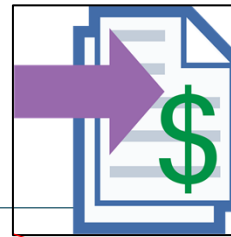
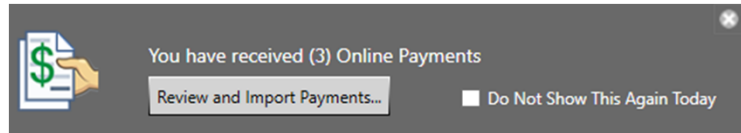
These payments also show up on the same reports as regular payments.



Import Payments Manually

If you don't select **Automatically Import Online Payments**, when online payments are received, and alert will appear.

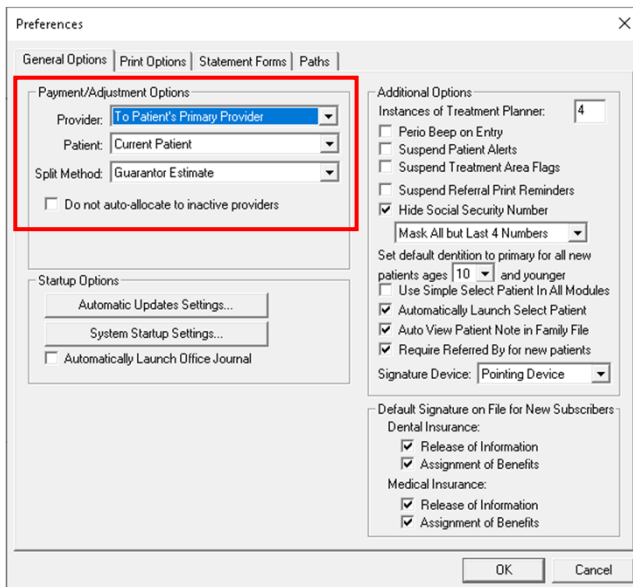
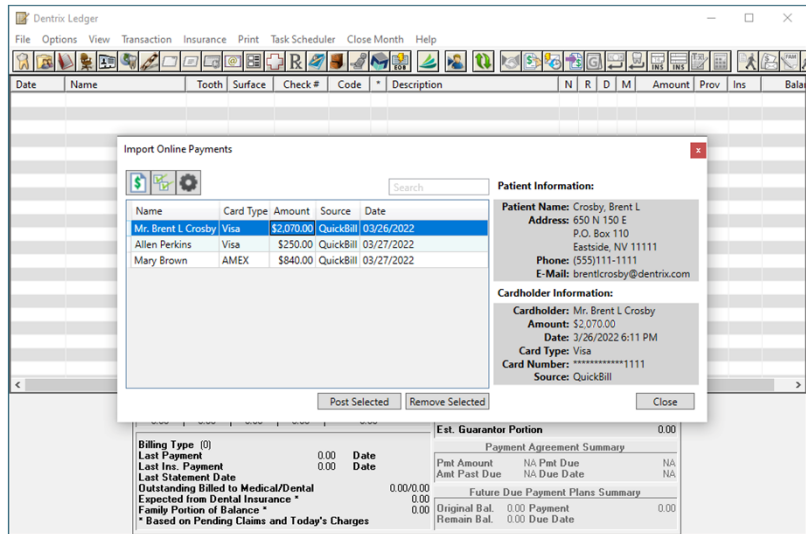
Click the button in the alert or click **Import Online Payment** from the Ledger toolbar.



Post Selected Payments

1. Select the account payment(s) you want to post.
2. Click **Post Selected**.

The payments will be posted to each guarantor's Ledger.



Online Payments will be split according to your Payment/Adjustment Options.

Manage these settings in the Office Manager under **Maintenance > Practice Setup > Preferences**, under **General Options**.

Split or Manage Payments

1. After payment is posted, open the guarantor's Ledger and open the online payment.
2. Split the payment or edit the payment details as needed.

The screenshot shows the Dentrix Ledger interface for patient Babu, Raj [BA0023]. The main window displays a table of transactions with columns for Date, Name, Tooth, Surface, Check #, Code, Description, N, R, D, M, Amount, Prov, Ins, and Balance. A 'Change or Delete Payment' dialog box is open, showing the date 5/30/2020, amount \$372.20, and a list of payment types including 'Web Patient Payment - Thank You'. The dialog also includes fields for Check/Payment #, Bank/Branch #, Provider (Split By Provider), Patient (Babu, Raj [BA0023]), and Split Method (Split By Family Members).

Date	Name	Tooth	Surface	Check #	Code	Description	N	R	D	M	Amount	Prov	Ins	Balance
04/01/20...	Raj Babu				D0120	Periodic oral evaluation					33.00	DD51	No	33.00
04/01/20...	Raj Babu				D0274	Bitewing Four Image					43.00	DD51	No	76.00
04/01/20...	Raj Babu				D1110	Prophylaxis-adult					64.00	DD51	No	140.00
04/01/20...	Raj Babu			6923	Pay	Check Payment - Thank You					-50.00	DD51		90.00
05/30/20...	Raj Babu			4598	Pay	Web Patient Payment - Thank You					-372.20	DD51		-282.20

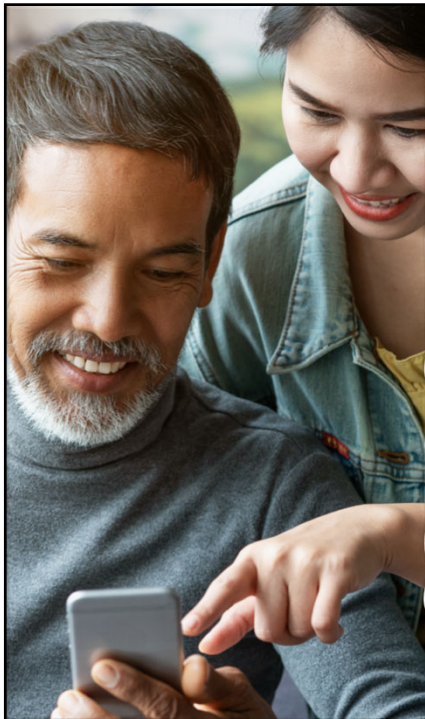


Questions?



Tracking Statement History

47



Problem: You Need to Have Access to Statement History

- When patients call with questions, it's easier to answer them if you can see the same statement they're seeing
- Patients may claim they didn't receive a statement
- You need to know who received a statement, when they received it, and what it looked like

48

Solution: View the QuickBill Statement History Report

- See who received a statement, when it was sent, amount billed, status of the statement, and a copy of the actual statement
- Helps you communicate with patient about their balance
- Makes it easier to understand and answer patient questions so you can encourage them to pay



49



Example:

- A patient called to ask about her balance.
- She said she didn't get a statement.
- View the statement history to see when and how it was sent and see a copy of the statement.

50



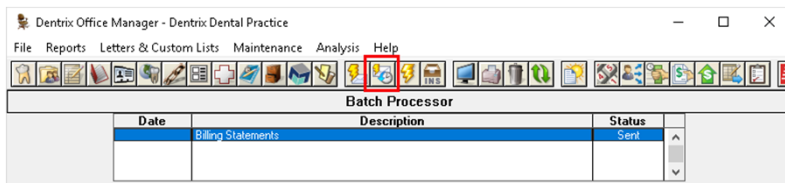
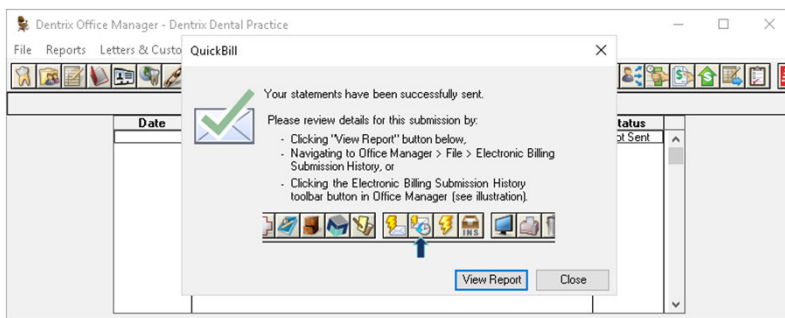
51

Open Submission History

- Click **View Report** after you submit the batch to view the statement history immediately

OR

- Click the **Statement History** button to see the history of previous batches



52

View the Status of Statements

Easily determine the status of each delivery method.

Use this information to follow up on accounts as needed or answer patient questions.

Electronic Statement Submission History for: Each Guarantor's Most Recent Submission

Submissions

Include Statements Not Sent

Date	Guarantor Name	Total	Mail Status	Email Status	Text Status	Notes
03/26/2022	Crosby, Brent	2,070.00	Not Sent	Sent	Payment Posted	
03/26/2022	Little, Dean	1,860.00	Submitted	Sent	Sent	
03/26/2022	Davis, Harmon	1,553.00	Submitted	Email Opened	Sent	
03/26/2022	Taylor, Mark	1,490.00	Submitted	Not Sent	Viewed	
03/26/2022	Winters, Bill	1,309.00	Submitted	Not Sent	Not Sent	
03/26/2022	Keller, Michelle	1,309.00	Submitted	Sent	Not Sent	
03/26/2022	Young, Randall	1,260.00	Submitted	Viewed	Not Sent	
03/26/2022	Perkins, Allen	1,250.00	Submitted	Sent	Payment Posted	
03/26/2022	Smith, Michael	890.00	Submitted	Not Sent	Not Sent	
03/26/2022	Brown, Mary	840.00	Submitted	Payment Posted	Sent	
03/26/2022	Reeves, Joshua	673.00	Submitted	Viewed	Sent	
03/26/2022	Winters, Carl	670.00	Submitted	Sent	Paid	
03/26/2022	Olsen, Paul Y	594.00	Submitted	Viewed	Not Sent	
03/26/2022	Hayes, Sally	590.00	Submitted	Patient Logged In	Viewed	
03/26/2022	Hansen, Corey L	590.00	Submitted	Sent	Viewed	
03/26/2022	Myers, Henry	568.00	Submitted	Paid	Sent	
03/26/2022	Edwards, John	474.00	Submitted	Sent	Sent	
03/26/2022	Valgardson, Adrian	375.00	Submitted	Viewed	Sent	
03/26/2022	Farrer, Lisa	284.00	Submitted	Email Opened	Sent	
03/26/2022	Zane, Jim	131.00	Submitted	Not Sent	Not Sent	
03/26/2022	Gleason, Gary N	131.00	Submitted	Sent	Sent	
03/26/2022	Johnson, Rachelle	65.00	Submitted	Sent	Patient Logged In	
03/26/2022	Schow, Lawrence P	38.00	Submitted	Not Sent	Sent	

Total Statements Sent by Mail: 22 Total Statements Sent by Email: 18 Total Statements Sent by Text: 17

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53

View a Copy of the Statement

Right-click the guarantor's name and select the option to view the billing statement history for the guarantor.

Note: The **View QuickBill Invoice** button takes you to the site to view your practice's QuickBill invoices.

Electronic Statement Submission History for:

Submissions

7/15/2020

Date	Guarantor Name	Total Billed	Mail Status	Email Status
07/15/2020	Abernathy, David	246.21	Not Sent	Sent
07/15/2020	Abjeet, Padma	673.77	Not Sent	Email Opened
07/15/2020	Adamson, Marla	154.53	Not Sent	Not Sent
07/15/2020	Aleksis, Miquelma	134.69	Not Sent	Sent
07/15/2020	Al-Hussein, Dina	1,073.03	Not Sent	Sent
07/15/2020	Al-Karagholi, Dunia	1,583.34	Not Sent	Not Sent
07/15/2020	Alman, Camila	388.39	Not Sent	Sent
07/15/2020	Alvarez, Manuel	1,347.53	Not Sent	Sent
07/15/2020	Armstrong, Jeremiah	2,100.00	Not Sent	Not Sent
07/15/2020	Aspen, Paul	918.96	Not Sent	Paid
07/15/2020	Atkins, Sr., Monte	1,009.93	Sent	Not Sent
07/15/2020	Babu, Raj	232.72	Not Sent	Not Sent
07/15/2020	Baker, Andre	3,239.03	Not Sent	Viewed
07/15/2020	Bar, Ken	740.74	Not Sent	Sent
07/15/2020	Barker, Desiree	606.70	Not Sent	Not Sent
07/15/2020	Barker, Michael	255.50	Not Sent	Paid
07/15/2020	Barnes, Kevin	115.39	Not Sent	Email Opened
07/15/2020	Beardall, Ryan	201.00	Not Sent	Not Sent
07/15/2020	Bernard, Arthur	45.75	Not Sent	Sent
07/15/2020	Bieliki, Jennifer	681.63	Not Sent	Sent
07/15/2020	Blalaney, Carl	1,136.96	Not Sent	Not Sent
07/15/2020	Breasco, Scott	131.87	Not Sent	Sent
07/15/2020	Brink, Fabio	351.31	Not Sent	Sent
07/15/2020	Brown, May	2,112.84	Not Sent	Not Sent
07/15/2020	Bruzzese, Vincent	887.03	Not Sent	Viewed
07/15/2020	Butler, Claudia	131.87	Not Sent	Sent
07/15/2020	Cackowski, Melinda	1,277.37	Not Sent	Sent

Total Statements Sent by Mail: 76 Total Statements Sent by Email: 76

View QuickBill Invoice Close

STATEMENT OF ACCOUNT

Henry Schein Practice
1000 South Hill Road
Rt 18
Americus, GA 30403
909-751-8800

STATEMENT PERIOD: 07/15/2020

STATEMENT END DATE: 07/15/2020

STATEMENT START DATE: 07/15/2020

ADD TO THIS STATEMENT FOR THE CURRENT OR NEXT PERIOD

DATE	DESCRIPTION	PAYMENT NAME	CHARGE	CREDIT
06/15/2020	Balance Forward		246.21	

Charges over 90 days past due

PENDING BALANCE	CURRENT CREDITS	CURRENT CHARGES	NET BALANCE
246.21	0.00	0.00	246.21

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Henry Schein Practice | 1000 South Hill Road | Rt 18 | Americus, GA, 30403 | 909-751-8800

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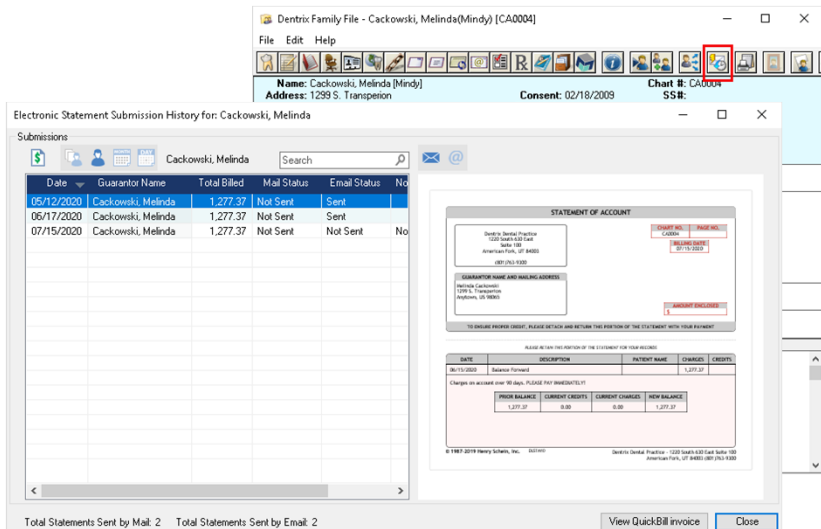
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54

View Statement History for a Specific Patient

You can view statement history for a specific guarantor from the Family File.

1. Select the patient in Family File.
2. Click the **Statement History** button.



55

Electronic Statement Submission History for: Each Guarantor's Most Recent Submission

Submissions

Include Statements Not Sent

Date	Guarantor Name	Total	Mail Status	Email Status	Text Status	Notes
03/26/2022	Crosby, Brent	2,070.00	Not Sent	Sent	Payment Posted	
03/26/2022	Little, Dean	1,860.00	Submitted	Sent		
03/26/2022	Davis, Harmon	1,553.00	Submitted	Email Opened	Sent	
03/26/2022	Taylor, Mark	1,490.00	Submitted	Not Sent	Viewed	
03/26/2022	Winters, Bill	1,309.00	Submitted	Not Sent	Not Sent	
03/26/2022	Keller, Michelle	1,309.00	Submitted	Sent	Not Sent	
03/26/2022	Young, Randall	1,260.00	Submitted	Viewed	Not Sent	
03/26/2022	Perkins, Allen	1,250.00	Submitted	Sent	Payment Posted	
03/26/2022	Smith, Michael	880.00	Submitted	Not Sent	Not Sent	
03/26/2022	Brown, Mary	840.00	Submitted	Payment Posted	Sent	
03/26/2022	Reeves, Joshua	673.00	Submitted	Viewed	Sent	
03/26/2022	Winters, Carl	670.00	Submitted	Sent	Paid	
03/26/2022	Olsen, Paul Y	594.00	Submitted	Viewed	Not Sent	
03/26/2022	Hayes, Sally	580.00	Submitted	Patient Logged In	Viewed	
03/26/2022	Hansen, Corey L	580.00	Submitted	Sent	Viewed	
03/26/2022	Myers, Henry	568.00	Submitted	Paid	Sent	
03/26/2022	Edwards, John	474.00	Submitted	Sent	Sent	
03/26/2022	Valgardson, Adrian	375.00	Submitted	Viewed	Sent	
03/26/2022	Farrer, Lisa	284.00	Submitted	Email Opened	Sent	
03/26/2022	Zane, Jim	131.00	Submitted	Not Sent	Not Sent	
03/26/2022	Gleason, Gary N	131.00	Submitted	Sent	Sent	
03/26/2022	Johnson, Rachelle	65.00	Submitted	Sent	Patient Logged In	
03/26/2022	Schow, Lawrence P	38.00	Submitted	Not Sent	Sent	

Total Statements Sent by Mail: 22 Total Statements Sent by Email: 18 Total Statements Sent by Text: 17

Tip: Use Filters

To find specific information on the list, use filters to:

- View each guarantor's most recent submission
- View submissions by a selected guarantor
- View submissions by month
- View submissions by specific date

56



Questions?

Conclusion

- Use QuickBill Premium to send statements to your patients the way it's convenient for them
- Give them the option to pay online
- Accelerate your collections process and keep up a steady cash flow in your practice





Next Steps

59

Quick Start Videos

- Visit www.Dentrix.com/resource-center
- Under **Insurance & Patient Billing Videos** click **Dentrix QuickBill**
- Watch video tutorials and read articles to get started with QuickBill.

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- Dentrix G7 Series Release Guide (All Versions)
- Patient Engage/Demand Force - How To Reset Your Password
- All About the Year-End Process in Dentrix
- Year-End Reports in Dentrix



Dentrix Videos

Learn how to do routine tasks in Dentrix.

- Appointment Book
- Document Center
- Family File
- Ledger
- Critical Manager
- Patient Chart & Perio Chart
- Treatment Planner



Insurance & Patient Billing Videos

Learn how to do routine insurance and patient billing using solutions for Dentrix.

- Dentrix eClaims
- Dentrix ERAs
- Dentrix Pay
- Dentrix QuickBill



Patient Communication Videos

Learn how to manage routine patient communications using solutions for Dentrix.

- Patient Engage Patient Communication
- Patient Engage Forms
- Patient Engage Online Booking
- Patient Engage Mobile
- Patient Engage Live
- Patient Engage Reputation Management



Clinical Efficiency Videos

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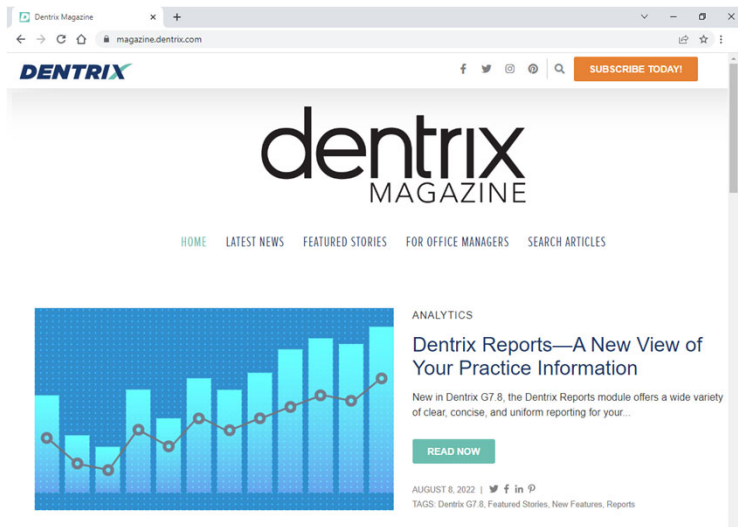
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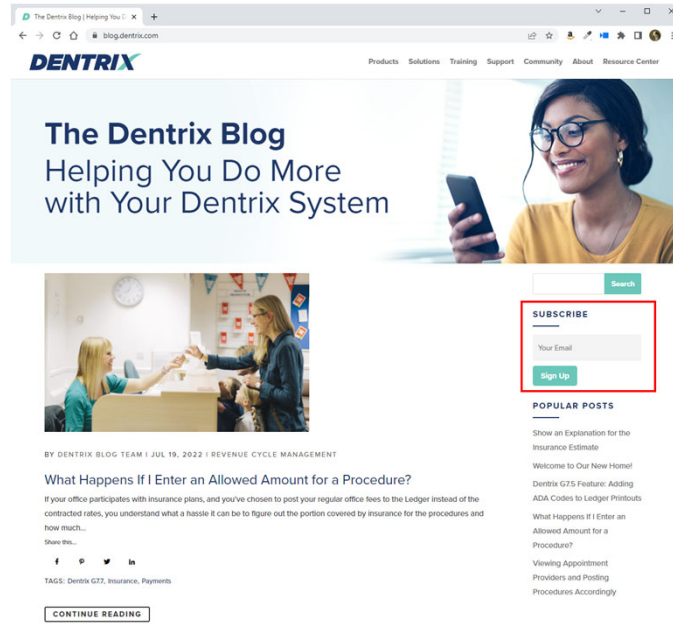
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Dentrix eRisk
Dentrix Pay
Dentrix QuickBill

Ledger
Collecting payments from patients and insurance is an important responsibility in the dental practice. Watch these videos to learn how to manage financial tasks like patient billing and insurance claim management in the Dentrix Ledger.

Ledger Overview (Duration 3:47)

Posting and Editing a Procedure in the Ledger (Duration 1:19)

Posting and Editing Payments (Duration 2:59)

Posting an Adjustment (Duration 1:22)

Creating a Primary Insurance Claim (Duration 0:38)

Creating a Secondary Insurance Claim (Duration 1:26)

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63

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64

Activate QuickBill Premium

If you want to get started texting patient billing notifications, click here to [learn how to activate QuickBill Premium!](#)



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