

Dentrix 2024 RELEASE GUIDE

Includes information about new features and enhancements in the following versions of Dentrix: 24.24, 24.23, 24.22, 24.21, 24.20, 24.19, 24.18, 24.17, 24.16, 24.15, 24.14, 24.13, 24.12, 24.11, 24.10, 24.9, 24.8, 24.7, 24.6, 24.5, 24.4, 24.3, 24.2, 24.1



PUBLICATION DATE

December 2024

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Dentrix 24.24

Overview and New Features

This Dentrix 24.24 Release Guide provides information about the Dentrix 24.24 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.24.

Note: For information about using the new features in Dentrix 24.24, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.24?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.24 includes the following enhancements:

MISCELLANEOUS

- Enhancements to Dentrix Eligibility include:
 - Added an On Demand "Eligibility Check is Complete" notification.
- Added a new tool called Practice Notifications. Using Practice Notifications, Henry Schein One can notify practices of new releases, hot fixes, or urgent situations, such as outages.
- For 2025, Dentrix system requirements have been updated to meet Windows 11 requirements and to ensure that Dentrix continues to perform optimally. The updated requirements appear in the Dentrix 2024 System Requirements document, so you can prepare for the new year. After October 14, 2025, Microsoft will no longer provide free software updates from Windows Update, technical assistance, or security fixes for Windows 10. For more information, click <u>Dentrix System Requirements</u>.
- The American Dental Association's CDT codes have been updated for 2025. Henry Schein One maintains a licensing agreement with the ADA that allows us to bring those changes to your practice management system as a software update. If you have an active Dentrix Customer Service Plan and use Dentrix G7.5 or later, Dentrix automatically downloads and installs the new codes. For more information, click <u>Updating CDT Codes in Dentrix for 2025</u>.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Dentrix Insurance Eligibility Enhancements



• Added an On Demand "Eligibility Check is Complete" notification.

Viewing Practice Notifications

The Practice Notifications tool allows HenrySchein One to push real-time notifications to your practice about new features, important updates, and critical issues. A new icon was added to the Appointment Book to alert you of new notifications.

To view a practice notification

1. From the Windows desktop, open the Appointment Book.

If you have received a notification, a red dot appears next to the Practice Notifications icon.

0P-1	0P-2	0P-3	Friday - December 6, 20	i 🖻 🔍 🗊 🚺 😼 🚟	😬 🔟 🔍 🛄 💆	i	What's Ne	ew 📢
0P-1	0P-2	0P-3	Friday - December 6, 20	24				
0P-1	0P-2	0P-3		6.4				
			0P-4	0P-5	0P-6	0P-7	OP-8	
								8:00a
								20
								:40
								9.00a
								:10
								:30
								- 50
								10.00
								20
								:40
								11.00
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								12.00
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2. To view the notification, click the Practice Notifications icon.

The **Practice Notifications** dialog box appears.

Practice Notifications	—		×
Yar Pirate Ipsum Jib splice the main brace scuttle prow yo-ho-ho draf boom square-rigged parrel. Pieces of Eight careen la Chain Shot Corsair swing the lead pressgang mizzen of the Coast loot haul wind interloper main sheet kee Yellow Jack aft.	t handso od hail-s furl. Bro el gango	omely hot ethren way jack	•
24 hours ago		Learn n	nore
Yar Pirate Ipsum Jib splice the main brace scuttle prow yo-ho-ho draf boom square-rigged parrel. Pieces of Eight careen la Chain Shot Corsair swing the lead pressgang mizzen of the Coast loot haul wind interloper main sheet ker Yellow Jack aft. 24 hours ago	t handso od hail-s furl. Bre el gangs	omely hot ethren way jack <u>Learn n</u>	• nore
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		Learn n	
			Close

3. To learn more about the notification, click Learn more.

Your browser opens to a website with a further explanation of the notification.

- 4. To mark the notification as having been read, click the blue dot to the upper-right of the notification.
- 5. To close the Practice Notifications dialog box, click Close.

Dentrix 24.23

Overview and New Features

This Dentrix 24.23 Release Guide provides information about the Dentrix 24.23 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.23.

Note: For information about using the new features in Dentrix 24.23, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.23?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.23 includes the following enhancements:

MISCELLANEOUS

- Enhancements to Dentrix Eligibility include:
 - Added an On Demand "Response Received" notification.
 - Changed the "Eligibility Pro Payer Maintenance" label to "Payer Connection Portal" and moved the menu position.
 - Updated the Eligibility Pro On Demand text and removed the 30-day snooze option.
 - Updated the Eligibility Response HTML file to more accurately reflect the "Source" of the eligibility.
 - Added co-pay entries to the Eligibility Response HTML file for DHMO/HMO plans.
- If you have enabled passwords, setting up security questions is now mandatory. You can skip setting up security questions for no more than three days.
- For 2025, Dentrix system requirements have been updated to meet Windows 11 requirements and to ensure that Dentrix continues to perform optimally. The updated requirements appear in the Dentrix 24.23 System Requirements document, so you can prepare for the new year. After October 14, 2025, Microsoft will no longer provide free software updates from Windows Update, technical assistance, or security fixes for Windows 10. For more information, click <u>Dentrix System Requirements</u>.
- The American Dental Association's CDT codes have been updated for 2025. Henry Schein One maintains a licensing agreement with the ADA that allows us to bring those changes to your practice management system as a software update. If you have an active Dentrix Customer Service Plan and use Dentrix G7.5 or later, Dentrix automatically downloads and installs the new codes. For more information, click <u>Updating CDT Codes in Dentrix for 2025</u>.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Dentrix Insurance Eligibility Enhancements

- Added an On Demand "Response Received" notification.
- Changed the "Eligibility Pro Payer Maintenance" label to "Payer Connection Portal" and moved its menu position.



• Updated the Eligibility Pro On Demand text and removed the 30-day snooze option.



- Updated the Eligibility Response HTML file to more accurately reflect the "Source" of the eligibility.
- Added co-pay entries to the Eligibility Response HTML file for DHMO/HMO plans.

Coverage					
Service Type	Description	IN NETWORK	OUT OF NETWORK	Ded Applies	Waiting Period
Diagnostic					
D0120	Routine dental exam to examine overall oral health and check for any necessary treatment needed	100%/\$25	100%/\$50	No	None
D0140	Problem focused dental exam for a specific issue	100%/\$25	100%/\$50	No	None
D0150	A thorough oral examination of the patient's dental history, usually performed on new patients	100%/\$25	100%/\$50	No	None
D0180	An examination detailing a patient's periodontal health	100%/\$25	100%/\$50	No	None
D0210	X-rays of all the teeth in the mouth	100%/\$25	100%/\$50	No	None
D0220	A diagnostic image of a single tooth that includes the tooth structure	100%/\$25	100%/\$50	No	None
D0230	An additional diagnostic image of a single tooth that	100%/\$25	100%/\$50	No	None

Setting up Security Questions

If you have enabled passwords, setting up security questions is now mandatory. You can skip setting up security questions for no more than three days. Once you have exceeded the three-day limit, you won't be able to log in to Dentrix until you set up your security questions.

To set up security questions

1. From the Windows desktop, double-click the icon, such as Office Manager, of the Dentrix module you want to open.

Password - Office Manager, Open		×
User ID:		
Password:		
Reset Password	OK	Cancel

The Password - [Office Manager], Open dialog box appears.

- 2. Type your user ID in the User ID field.
- 3. Type your password, and then click OK.

The Set up your security questions dialog box appears.

Note: If you have exceeded the three-day skip limit, the **Skip** button is no longer active, and you cannot close the **Set up your security questions** dialog box.

Dentrix	×
Set up your security questions These questions will be used to verify your identity and reset your password Each answer must be at least 3 characters long.	
Security Question 1	
Question	
Select	~
Answer	
Security Question 2 Question Select	~
Answer	
Security Question 3 Question Select	~
Answer	
SKIP • You have 3 skips remaining SAV	Έ

- 4. Under Security Question 1, select the desired question form the Question list.
- 5. Under Answer, type your answer to the selected question.

Note: The answers to these questions are used to verify your identity and reset your password. Answers must be at least three characters long.

- 6. Repeat steps 4 and 5 for security questions 2 and 3.
- 7. Click Save.

SKIPPING SETTING UP SECURITY QUESTIONS

When you skip setting up security questions, a warning message appears.

Dentrix	
Set up your security questions These questions will be used to verify your identit Each answer must be at least 3 characters long.	ty and reset your password.
Security Question 1	
Question	
Select	~
Answer	
Security Question Select Answer SKIP Security Question 3 Counties	estions nt won't be ant to skip?
Select	~
Answer	
SKIP • You have 3 skips remaining	SAVE

SETTING UP SECURITY QUESTIONS MANUALLY

If skipped setting up the security questions when you initially logged in, you can set them up manually using either of the following methods:

• In the Office Manager menu bar, click Maintenance > Practice Setup > Passwords > Practice Passwords Setup.

• From any Dentrix module displaying the logged in user's name, click the name, and then click **Password Security Questions Setup**.

The Set up your security questions dialog box appears.

entrix	\times
Set up your security questions These questions will be used to verify your identity and reset your password. Each answer must be at least 3 characters long.	
Security Question 1	
Question	
Select ~	
Answer	
Security Question 2	
Answer Security Question 3	
Question	
Select ~	
Answer	
CANCEL	

REVIEWING YOUR SECURITY QUESTIONS

If you have previously set up your security questions, you can review them, but not your answers. If you want, you can change your questions.

To review your security questions

1. If you have previously set up your security questions, you can review them, but not your answers. If you want, you can change your questions.

The Review Your Security Questions dialog box appears.



2. To change your security questions, click Change Questions.

The **Set up your security questions** dialog box appears from which you can change your questions and answers.

Dentrix 24.22

Overview and New Features

This Dentrix 24.22 Release Guide provides information about the Dentrix 24.22 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.22.

Note: For information about using the new features in Dentrix 24.22, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.22?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.22 includes the following enhancements:

MISCELLANEOUS

- New and updated features to Dentrix Eligibility include:
 - Added **Deductible Met** and **Max Reached** indicators to the Eligibility Response HTML file. This enhancement provides a visual indicator when patients meet their deductibles or reach their maximum benefits for the plan year.
 - Updated the header in the Eligibility Response HTML file to make the **Source** label more prominent. It now appears in the top-right corner of the file and the font size is larger. The term "Essentials" or "Pro" also appears in the label to identify which Eligibility solution your office is using.

COMING SOON

- The 2025 update to the CDT codes for Dentrix versions G.7 and higher.
- An update to Dentrix system requirements. These changes to system requirements are being made to meet Windows 11 requirements and to ensure that Dentrix continues to perform optimally. After October 14, 2025, Microsoft will no longer provide free software updates from Windows Update, technical assistance, or security fixes for Windows 10.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Viewing Dentrix Eligibility New Features and Updates

New and updated features to Dentrix Eligibility include the following:

- Added **Deductible Met** and **Max Reached** indicators to the Eligibility Response HTML file. This enhancement provides a visual indicator when patients meet their deductibles or reach their maximum benefits for the plan year.
- Updated the header in the Eligibility Response HTML file to make the **Source** label more prominent. It now appears in the top-right corner of the file and the font is larger. The term "Essentials" or "Pro" also appear in the label to identify which Eligibility solution your office is using.

DEDUCTIBLE MET

In the Eligibility Response HTML file, the **Deductible Met** indicator (green check mark in a green circle with a white background) provides a visual sign that patients have met their deductibles.

Deductibles and Maximums		⊘ Deductible Met	🛞 Max Reached
Deductibles	Category	In network	Out of network
Individual			
Lifetime Amount	Dental care	\$25.00 🥝	\$65.00
Lifetime Remaining	Dental care	\$0.00	\$40.00
Family			
Lifetime Amount	Dental care	\$75.00	\$185.00
Lifetime Remaining	Dental care	\$25.00	\$135.00
Maximums	Category	In network	Out of network
Individual			
Lifetime Amount	Dental care	\$2500.00	\$1500.00
Lifetime Remaining	Dental care	\$0.00 🛞	\$460.60

MAXIMUM REACHED

In the Eligibility Response HTML file, the **Max Reached** indicator (red X in a red circle with a white background) provides a visual sign that patients have reached their maximum benefits for the plan year.

Deductibles and Maximums		⊘ Deductible Met	🛞 Max Reached
Deductibles	Category	In network	Out of network
Individual			
Lifetime Amount	Dental care	\$25.00 ⊘	\$65.00
Lifetime Remaining	Dental care	\$0.00	\$40.00
Family			
Lifetime Amount	Dental care	\$75.00	\$185.00
Lifetime Remaining	Dental care	\$25.00	\$135.00
Maximums	Category	In network	Out of network
Individual			
Lifetime Amount	Dental care	\$2500.00	\$1500.00
Lifetime Remaining	Dental care	\$0.00 🛞	\$460.60

SOURCE LABEL IN THE ELIGIBILITY RESPONSE HTML FILE

The header in the Eligibility Response HTML file was updated to make the **Source** label more prominent. The label now appears in the top-right corner of the file. The font is larger in size, and the terms "Essentials" or "Pro" also appear in the label to identify which Eligibility solution your office is using.



Dentrix 24.21

Overview and New Features

This Dentrix 24.21 Release Guide provides information about the Dentrix 24.21 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.21.

Note: For information about using the new features in Dentrix 24.21, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.21?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.21 includes the following enhancements:

MISCELLANEOUS

- Henry Schein One has added a new vendor partner to our current group of claim processing partners. This announcement is for your awareness only. It will not change your existing service, payment, or delivery, and there is no action needed on your part.
- The transition from the Vyne (NEA) claims attachment services to DentalXChange began the week of 11/4/2024. This transition is expected to be completed with all payers in early December, 2024. Please note the following:
 - Henry Schein One will still use Vyne (NEA) to submit attachments for some payers that DentalXChange cannot. Moving attachment processing for these payers to DentalXChange would result in a temporary downgrade of functionality, so Henry Schein One is not transitioning all payers at the same time.
 - Because this process will be fairly fluid throughout the transition (possibly changing daily), a list of when payers will have their attachment processing transitioned to DentalXChange will not be available; however, if need be, you can contact Customer Support during this transition to learn which attachment service your attachments are routing through.
 - This transition will all be done by Henry Schein One on the backend and will require no changes to the practice management software setup by the customer. The workflow for adding and sending attachments will also not change.
 - This change will not affect pricing.
- The only change you may notice will be that claims and attachment reports will begin to display a DentalXChange (DXC) Number instead of an NEA Number (for those attachments routed through DentalXChange). You'll need to reference this number when dealing directly with payers.
- New and updated features to Dentrix Eligibility include:
 - Updated the logic for the import process so that one plan level maximum displays rather than multiple when an insurer returns the same plan maximum for different service types in the **Dental Insurance Benefits and Coverage** dialog box.
 - Updated the Payer ID in the HTML file to the Dentrix Payer ID rather than the Tuuthfairy Payer ID.
 - Updated the **Missing Tooth Clause** and **Downgrades** indicators in the HTML file to reflect when they apply to an insurance plan.
 - Refresh the Eligibility icon in the Appointment Book automatically to update the status more quickly.
- When it's open, the Signature Manager **Settings** dialog box no longer prevents you from accessing other Dentrix modules that are already open.
- The Signature Manager no longer resets the filters you selected to the default settings when you close the Signature Manager.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Electronic Attachments Migration

Henry Schein One has added a new vendor partner to our current group of claim processing partners. This announcement is for your awareness only. It will not change your existing service, payment, or delivery, and there is no action needed on your part.

The transition from the Vyne (NEA) claims attachment services to DentalXChange began the week of 11/4/2024. This transition is expected to be completed with all payers in early December, 2024. Please note the following:

- Henry Schein One will still use Vyne (NEA) to submit attachments for some payers that DentalXChange cannot. Moving attachment processing for these payers to DentalXChange would result in a temporary downgrade of functionality, so Henry Schein One is not transitioning all payers at the same time.
- Because this process will be fairly fluid throughout the transition (possibly changing daily), a list of when payers will have their attachment processing transitioned to DentalXChange will not be available; however, if need be, you can contact Customer Support during this transition to learn which attachment service your attachments are routing through.
- This transition will all be done by Henry Schein One on the backend and will require no changes to the practice management software setup by the customer. The workflow for adding and sending attachments will also not change.
- This change will not affect pricing.

The only change you may notice will be that claims and attachment reports will begin to display a DentalXChange (DXC) Number instead of an NEA Number (for those attachments routed through DentalXChange). You'll need to reference this number when dealing directly with payers.

Example of Current Attachment ID

Status/	Patient/	Birth Date/	Prov ID	/ Claim ID/
Attachment ID	Payer	Service Da	te View [Date Req Nbr
ACCEPTED	Doxy, Scott	11000101	231C	DNT11111111
NEA1111111	5) BCBS	20241016		

Example of New Attachment ID

Status/	Patient/	Birth Date/	Prov ID	/ Claim ID/
Attachment ID) Payer	Service Da	te View D	Date Req Nbr
ACCEPTED	Doxy, Scott	11000101	231C	DNT11111111
DXC11111111	5 BCBS	20241016	5	

Viewing Dentrix Eligibility New Features and Updates

New and updated features to Dentrix Eligibility include the following:

- Updated the logic for the import process so that one plan level maximum displays rather than multiple when an insurer returns the same plan maximum for different service types in the **Dental Insurance Benefits and Coverage** dialog box.
- Updated the Payer ID in the Eligibility Response HTML file to the Henry Schein One Payer ID rather than the Tuuthfairy Payer ID.
- Updated the **Missing Tooth Clause** and **Downgrades** indicators in the Eligibility Response HTML file to reflect when they apply to an insurance plan.
- Refresh the Eligibility icon in the Appointment Book automatically to update the status more quickly.

IMPORTING MAXIMUMS

When an insurance provider returns the same plan maximum for different service types, one plan maximum appears in the **Dental Insurance Benefits and Coverage** dialog box rather than multiple maximums. In the following example, the **Standard** maximum of \$1200.00 appears because it applies to all of the other services.

insurance Plan	Subscriber			Benefit	Begin Date*	5/27/	2020 🗸 S	ubsoriber)	D 92431	7668	Signal	ure on File: Release of In	formation			
Deductibles Maximums	Patient			Benefit	Begin Date*	5/27/	2020 ~				8	Assignment o	f Benefits	Continuin	g Care	
overage Table													Select	Insurance P	lan to Copy	From:
inceptions	Current Yea	r's Previous	Year's													
nsurance Plan Notes	Deduct	Annual Required	Individual Annual Met	Individual Lifetime Required	Individual Lifetime Met	Family Annual Required	Family Annual Met	1	Maxim	Annual Benefit	ndividual Annual Used	Individual Lifetime Benefit"	Individual Lifetime Used"	Family Annual Benefit	Family Annual Used	
Payment Table &	Standard	75.00	75.00	0.00	0.00	150.00	75.00	X	Standard	1200.00	1945.24	0.00	0.00	0.00	1946.24	
/ment Table & swed Amounts e-Of-Network	Preventi.	0.00	0.00	0.00	0.00	0.00	0.00		adjuncti	1200.00	0.00	0.00	0.00	0.00	0.00	11
ut-Of-Network	Other	75.00	75.00	0.00	0.00	150.00	75.00		crowns*	1200.00	0.00	0.00	0.00	0.00	0.00	
ut-Of-Network eductibles/Maximums ut-Of-Network overage Table	adjuncti	75.00	0.00	0.00	0.00	0.00	0.00		dagnost.	1200.00	0.00	0.00	0.00	0.00	0.00	
	crowns*	75.00	0.00	0.00	0.00	0.00	0.00		endodo	1200.00	0.00	0.00	0.00	0.00	0.00	
ut-Of-Network	dagnost.	75.00	75.00	0.00	0.00	150.00	75.00		implants*	1200.00	0.00	0.00	0.00	0.00	0.00	
xceptions	endodo	75.00	0.00	0.00	0.00	0.00	0.00	·	oral_sur_	1200.00	0.00	0.00	0.00	0.00	0.00	1
ut-Of-Network	implants"	75.00	0.00	0.00	0.00	0.00	0.00		Other*	0.00	0.00	1500.00	0.00	0.00	0.00	
ayment Table & Bowed Amounts	oral_sur	75.00	0.00	0.00	0.00	0.00	0.00		periodo	1200.00	0.00	0.00	0.00	0.00	0.00	
	nation	76.44	0.00	0.00	0.00	0.00	0.00		Pressent	1000.00	0.00	0.00	0.00	0.00	0.00	

UPDATED THE PAYER ID IN THE ELIGIBILITY RESPONSE HTML FILE

The Payer ID in the Eligibility Response HTML file in the Document Center now reports the Dentrix Payer ID, rather than the Tuuthfairy Payer ID.

Plan		D0180	An examination detailing a patient's periodontal health	1 per 6 months	02-15-2024	None
Plan Name Dentalguard Preferred	Insurance Type PPO	D0210	X-rays of all the teeth in the mouth	1 per 60 months	02-15-2024	None
Effective Date 09-16-2024	Plan Period Calendar Year	D0220	A diagnostic image of a single tooth that includes the tooth structure	None	None	None
Plan Start 01-01-2024	Plan End 12-31-2024	D0230	An additional diagnostic image of a single tooth that include the root structure	None	None	None
COB Rule - Downgrades	Missing Tooth Clause No Pays on Prep or Seat	D0272	2 diagnostic bitewing x-ray images used to check for tooth decay	1 per 12 months	02-15-2024	None
No	Plan Date	D0274	4 diagnostic bitewing x-ray images used to check for tooth decay	1 per 12 months	02-15-2024	None
Payer Payer ID		D0330	X-ray of the entire mouth	1 per 60 months	02-15-2024	None
64246		Preventive				
		D1110	Professional teeth cleaning for adults	1 per 6 months	05-20-2024	Min Age: 12
Provisions		D1120	Professional teeth cleaning for children	1 per 6 months	05-20-2024	None
Threshold:\$1000 Maximum rollover	amount\$500	D1206	Application of Fluoride to all teeth using a varnish	1 per 6 months	None	Max Age: 19
 Rollover amount if network:\$0 Maximum rollover 	all benefits paid in-	D1208	Application of fluoride to all teeth excluding varnish	1 per 6 months	None	Max Age: 19
Personal maximum	n rollover account:\$0.0	D1351	Surfaces of tooth sealed with a resin to help prevent tooth decay	1 per 36 months	None	Max Age: 16
		Restorative	Basic			

UPDATED MISSING TOOTH CLAUSE AND DOWNGRADES

Updated the **Missing Tooth Clause** and **Downgrades** indicators in the Eligibility Response HTML file to reflect whether they apply to an insurance plan.

Plan		D0180	An examination detailing a patient's periodontal health	1 per 6 months	02-15-2024	None
Plan Name Dentalguard Preferred	Insurance Type PPO	D0210	X-rays of all the teeth in the mouth	1 per 60 months	02-15-2024	None
Effective Date 09-16-2024	Plan Period Calendar Year	D0220	A diagnostic image of a single tooth that includes the tooth structure	None	None	None
Plan Start 01-01-2024	Plan End 12-31-2024	D0230	An additional diagnostic image of a single tooth that include the root structure	None	None	None
COB Rule Downgrades	No Pays on Prep or Seat	D0272	2 diagnostic bitewing x-ray images used to check for tooth decay	1 per 12 months	02-15-2024	None
No	Plan Date	D0274	4 diagnostic bitewing x-ray images used to check for tooth decay	1 per 12 months	02-15-2024	None
Payer Payer ID		D0330	X-ray of the entire mouth	1 per 60 months	02-15-2024	None
64246		Preventive				
		D1110	Professional teeth cleaning for adults	1 per 6 months	05-20-2024	Min Age: 12
Provisions Threshold:\$1000 Maximum rollover amount \$500		D1120	Professional teeth cleaning for children	1 per 6 months	05-20-2024	None
	amount:\$500	D1206	Application of Fluoride to all teeth using a varnish	1 per 6 months	None	Max Age: 19
 Rollover amount if network:\$0 Maximum rollover 	all benefits paid in-	D1208	Application of fluoride to all teeth excluding varnish	1 per 6 months	None	Max Age: 19
Personal maximum	n rollover account:\$0.0	D1351	Surfaces of tooth sealed with a resin to help prevent tooth decay	1 per 36 months	None	Max Age: 16
		Restorative	Basic			

6 Dentrix 24.21

Dentrix 24.20

Overview and New Features

This Dentrix 24.20 Release Guide provides information about the Dentrix 24.20 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.20.

Note: For information about using the new features in Dentrix 24.20, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.20?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.20 includes the following enhancements:

MISCELLANEOUS

- New and updated features to Dentrix Eligibility include:
 - Displaying one plan amount deductible rather than multiple amounts when an insurer returns the same plan deductible for different service types in the **Dental Insurance Benefits and Coverage** dialog box.
 - Providing three options rather than two when you exit importing benefit details.
 - Updating the Eligibility Response HTML file to include a Benefit Notes indicator and section when a procedure code or service category is returned with a benefit note.
 - Updating the color of the Eligibility icon in the Appointment List window to match the color of the Eligibility icon in the Appointment Book.

Note: You cannot check insurance eligibility from the Appointment List window.

- Returning errors in Tuuthfairy related to validation, such as invalid NPI or DOB. Eligibility requests that return one of these validation errors do not change the Eligibility icon color to orange.
- (Beta only) Beta offices can get a sneak peek of the new Family File module.
- A new procedure code category called **Sleep Apnea** was added to the **Procedure Code Setup** dialog box. As a result, the total number of procedure code categories in the **Practice Definitions** dialog box was increased from 15 to 20.
- In the Signature Manager's **Settings** dialog box, clicking **Cancel** now closes the dialog box without saving changes.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Viewing Dentrix Eligibility New Features and Updates

New and updated features to Dentrix Eligibility include the following:

- Displaying one plan amount deductible rather than multiple amounts when an insurer returns the same plan deductible for different service types in the **Dental Insurance Benefits and Coverage** dialog box.
- Providing three options rather than two when you exit importing benefit details.
- Updating the Eligibility Response HTML file to include a Benefit Notes indicator and section when a procedure code or service category is returned with a benefit note.
- Updating the color of the Eligibility icon in the Appointment List window to match the color of the Eligibility icon in the Appointment Book.

Note: You cannot check insurance eligibility from the Appointment List window.

• Returning errors in Tuuthfairy related to validation, such as invalid NPI or DOB. Eligibility requests that return one of these validation errors do not change the Eligibility icon color to orange.

IMPORTING DEDUCTIBLES

When an insurance provider returns the same plan deductible for different service types, one plan deductible appears in the **Dental Insurance Benefits and Coverage** dialog box rather than multiple deductibles. In the following example, the **Standard** deductible of \$75.00 appears because it applies to all of the other services.

nsurance Plan	Subscriber Patient	bscriber: Benefit Begin Date" 5/27/2020 v Subscriber (D S24317668 Sent: Benefit Begin Date" 5/27/2020 v								7668	Signal	ure on File Release of In	formation	Continuing Care		
Coverage Table	Current Year	A Desired	Varia									and part of	Select	Insurance P	lan to Copy I	From:
Exceptions Insurance Plan Notes	Deduct	Amual Required	Individual Annual Met	Individual Lifetime Required	Individual Lifetime Met	Family Annual Required	Family Annual Met	+	Maxim	Annual Benefit	hdividual Annual Used	Individual Lifetime Benefit"	Individual Lifetime Used"	Family Annual Benefit	Family Annual Used	
Payment Table &	Standard	75.00	75.00	0.00	0.00	150.00	75.00	X	Standard	1200.00	1945.24	0.00	0.00	0.00	1946.24	
Bowed Amounts	Preventi.	0.00	0.00	0.00	0.00	0.00	0.00		adjuncti	1200.00	0.00	0.00	0.00	0.00	0.00	
e-Of-Network ductibles Maximums	Other	75.00	75.00	0.00	0.00	150.00	75.00		crowns*	1200.00	0.00	0.00	0.00	0.00	0.00	
evolution in a constant	adjuncti	75.00	0.00	0.00	0.00	0.00	0.00		dagnost.	1200.00	0.00	0.00	0.00	0.00	0.00	
ut-Of-Network overage Table	crowns'	75.00	0.00	0.00	0.00	0.00	0.00		endodo	1200.00	0.00	0.00	0.00	0.00	0.00	
of Of Natural	dagnost.	75.00	75.00	0.00	0.00	150.00	75.00		implants*	1200.00	0.00	0.00	0.00	0.00	0.00	
xceptions	endodo	75.00	0.00	0.00	0.00	0.00	0.00	·	oral_sur_	1200.00	0.00	0.00	0.00	0.00	0.00	1
ut-Of-Network	implants"	75.00	0.00	0.00	0.00	0.00	0.00		Other*	0.00	0.00	1500.00	0.00	0.00	0.00	
ayment Table & Bowed Amounts	oral_sur_	75.00	0.00	0.00	0.00	0.00	0.00		periodo	1200.00	0.00	0.00	0.00	0.00	0.00	
	nation	74.44	0.00	0.00	0.00	0.00	0.00		Pressent	1000.00	0.00	0.00	0.00	0.00	0.00	22

EXITING AN INSURANCE BENEFIT DETAILS IMPORT

You now have three options to choose from when you exit importing insurance benefit details:

 Mark as Done – Marks the import as done, closes the Insurance Benefit Details dialog box, and changes the Eligibility icon color to green

- Exit without Importing Leaves the status of the import as not done, closes the Insurance Benefit Details dialog box, and does not change the color of the Eligibility icon as a reminder that the import was postponed
- **Cancel** Cancels the exit from the **Insurance Benefit Details** dialog box.

Leaving Insurance	benefit details Import	?
How would you like to proc	eed?	
Mark as Done	Exit without Importing	Cancel

ELIGIBILIITY RESPONSE HTML FILE

The Eligibility Response HTML file in the Document Center now contains a section called **Benefit Notes**. A Benefit Notes indicator appears next to any procedure code that has a note attached. The same indicator appears next to **Benefit Notes**.

a Dentrix Document Center - Pellegrini, Robert (PE0005)							-	o ×
Ele Edit View Acquire Setup Help								
🕅 🕼 🕼 🐌 💺 🧠 🛵 🗆 🖅 🖼 🔛 🖳 R. 🥒 🕖 💷 🚱 🏜 🗟 . 🌬 😵 🚳 40 Pelegrini, Robert								
I I I I I I I I I I I I I I I I I I I								
B Pollecini, Robert (PE000)	D6058	Crown made of	0%	No	None			
E 😥 Insurance Eligibility		porcelain/ceramic,						
State		abutment on an						
9302024 Insurance Bigibility		implant						
§ 9302024 Insurance Bigibility	D6064	Crown made of cast	0%	No	None			
9272024 Insurance Eligibility		by an abutment on an						
S 9272024 Insurance Bigibility		implant						
9272024 Insurance Eligibility	D6194	Titanium retainer	0%	No	None			
D 2172024 Insurance Bigblildy		partial denture,						
9272024 Insurance Eligibility		supported by an						
S 9272024 Insurance Eligibility		implant						
927/2024 Insurance Bigblildy	Oral Surgery							
9272024 Insurance Eligibility	07111.0	Removal of a baby	85%	Vet	None			
927/2024 Insurance Bi-piblity	0.111	tooth that has some of	4374	147				
9/27/2024 Insurance Eligibility		the crown under the gums						
9272024 Insurance Eligibility	D7230	Surpical removal of a	25%	Ves	None			
9272024 Insurance Eligibility	0.000	tooth that is covered						
927/2024 Insurance Eligibility		gums and partially						
9272024 Insurance Eligibility		covered by bone						
§ 927/2024 Insurance Bi-piblity	D7963	Removal of excess	85%	Yes	None			
9272024 Insurance Eligibility		tissue and removal or repositioning of						
§272024 Insurance Bigblity		muscle inside the						
§ 9272024 Insurance Eligibility		invoir.						
§ 9272024 Insurance Elipibility	D8010	Limited orthodontic	0%	No	None			
S 3272024 Insurance Eligibility		treatment for a child						
S 927/2024 Insurance Elipticity	Adjunctive							
Statistics English	D9230	Use of nitrous oxide	0%	No	None			
Survey and the second s	D9944	Removable dental	85%	Yes	None			
		guard to minimize						
S d'Arcela Insurance Disputs		teeth or for other				R		
		treatment						
A default and a default of the second s								
S 9272022 Insurance Exhibitor	Benefit Note	s 🛅						
\$ 927/2024 Insurance Bisibility		-						
A 9272024 Insurance Eisability	D0140			Test One				
S 927/2024 Insurance Biobility	D0220			Test Two				
A 9272024 Insurance Biobility	D7111			Another Test				
S 927/2024 Insurance Bipbility	D8010			Without category				
\$ 927/2024 Insurance Bigbliny	Endodontics			Whitout Procedures				
9272024 Insurance Bigibility								

Previewing the New Family File (Beta Sites Only)

The Family File module has been redesigned to be more intuitive and modern looking. Currently, the preview of the new Family File is only available to Beta offices.

To preview the new Family File

1. Open the Family File.

Eile L	Pentrix ramily rile - Abbott, Ken S (ABD	001						-	~
rile	Select Patient F2 Clear Family Refresh F5	bbott, Ken S 500 W Co	nsent: 03/05/2	8022	Chart #: A SS#: 0	80001	a	ŵ	R
	New Family Add New Family Member	01 Firs ide, IV 1111 Las 1/297-1586, W (801)797-1751 Missed 1)797-1700 - M. Married, Guar, Ins, H-ol-H I	t Visit: 03/05// t Visit: 03/05// I Appt: E-Mail: 1KenAb	2022 2022 I Fee b@dentrix.cr	DL#: 1 Birthday: 0 Provider: 0 e Sched: < om	1591446 5/02/1987, 37 DS1 Prov Default>			
	Submission History	Employer AT&T	Cont. 01/3 Care 04/1	0/23 BITE 1/24 PRO	WINGS PHY	04/11/24 12/01/25 FM	SCREENING, ⋉		
	Print Patient Notes	nsurance View Sec	Patient Note	8					
	Switch To >	Chart							
	Exit	Appointments							
	0>30 31	eDex	Referred By						
	Paymen Bill Type: 4	Questionnaires	Referred To						
	Status	Health History	Position	Gender	Patient	Birthday			
	HofH Guar In Ins	Quick Letters Quick Labels Continuing Care Send Message Prescriptions Office Journal Document Center Patient Picture Patient Alerts Patient Referrals	Married Married Child	Male Female Male	Yes Yes Yes	05/02/1987 11/28/1989 02/14/2011	I		
		Trojan Preview New Family File							

2. In the menu bar, click File, point to Switch To, and then click Preview New Family File. The new Family File window appears.

🚙 Family File File				- 0	×
Here's a sneak peek of the new Family File! We are still addir Family Member Ken S. Abbott	ng more features, but would lov	re to hear your <u>feedback</u> on	what we have so far.		
Contact Information	Patient Information				
Home Phone # Work Phone # (801) -1751	Chart # AB0001	Gender Male	Birthday 05/02/1987, 37	Social Security # 000-00-0001	
Email 1KenAbb@dentrix.com	Provider DDS1	Fee Schedule <prov default=""></prov>	DL# 11591446	HofH / Guarantor Yes	
Address 608 S 500 W, Apt. 101, Eastside	Insurance Subscriber Yes	Position Married			
Continuing Care	Primary Dental Insurance				
01/30/2023 BITEWINGS	Company Blue Cross Blue Shield	Group Plan AT&T	Group Number 21440	Fee Schedule	
04/11/2024 SCREENING	Coverage 1000.00	Used 0.00	Deductible S/P/O 25/0/0	Met 0/0/0	
01/02/2027 PANOREX	Other Coverage Ortho" (\$500)				

3. To edit a card, such as Contact Information, hover your mouse pointer over the card, and then click the Edit icon in the upper-right corner.

ranny rite				-	>
e					
ere's a sneak peek of the new Family File! We are	still adding more features, but would lov	e to hear your <mark>feedback</mark> on	what we have so far.		
mily Member S. Abbott					
Contact Information	Patient Information				
Home Phone # Work Phone # (801)797-1586 (801)797-1751	Chart # AB0001	Gender Male	Birthday 05/02/1987, 37	Social Security # 000-00-0001	
Email 1KenAbb@dentrix.com	Provider DDS1	Fee Schedule <prov default=""></prov>	DL# 11591446	HofH / Guarantor Yes	
Address 608 S 500 W, Apt. 101, Eastside	Insurance Subscriber Yes	Position Married			
Continuing Care	Past Due Primary Dental Insurance				
01/30/2023 BITEWINGS	Company Blue Cross Blue Shield	Group Plan	Group Number 21440	Fee Schedule	
04/11/2024 SCREENING	Coverage 1000.00	Used 0.00	Deductible S/P/O 25/0/0	Met 0/0/0	
12/01/2025 FMX 01/02/2027 PANOREX	Other Coverage Ortho* (\$500)				

4. To provide feedback, please click the "feedback" link.

The following feedback survey window appears.

	^	You've been invited to participate × +						-	0	×
×	: (ttps://usabi.li/do/2c370c251526/84e1			Cþ	£≞	Ē	~		•
		Beta Family Fi We're developing we've released a s to hear your first in Please take a mon This survey will tak Provide Feedbar	ile Feedbar an improved f sneak peek wi mpressions sc nent to share y nent to share y net 2 - 4 minut rck	ck St amily f th limi we c your fe es to o	lile, ar ted fu an kee eedba compl	/ nction p mak ck. ete.	art of ality. V	this, Ve'd k	ove ;	

5. Click Provide Feedback to open a survey.

Viewing the Sleep Apnea Procedure Code Category

A new procedure code category called **Sleep Apnea** was added to the **Procedure Code Setup** and **Practice Definitions** dialog boxes.

To view the Sleep Apnea procedure code category

1. In the Office Manager, click Maintenance, point to Practice Setup, and then click Procedure Code Setup.

The Procedure Code Setup dialog box appears.
Procedure	Code Setup	Medi	ical ICD-9-0	см Іср-10-см	Modifier Service		×
	Procedure Code Category (None] Diagnostic Preventive Restorative Endodontics Periodontics Periodontics Prosth, remov Maxillo Prosth Implant Serv Prostho, fixed Dral Surgery Orthodontics Adjunct Serv Sleep Apnea Conditions	*	Search: ADA D9947 D9948 D9943 D9953 D9954 D9955 D9956 D9957	User Code CstSIApAp AdjSIApAp RepSIApAp RinSIpApI FbOtMoRDe OATTtrVst AdHSIpTst ScnSIpBDs	Description Cust sleep apnea appl fab&pla Adj cust sleep apnea applan Repair cust sleep apnea appl Reline custom sleep apnea ap Fab/del (OAT) morn rposit dvi Oral appli thrpy (OAT) trt vst Admin home sleep apnea test Scrn slp-reltd breath disorders	Curre Clear ace ee opl ce	ent Version: 2024
			New	Edit	CDT Update	What's N	lew
							Close

- 2. To view the codes associated with sleep apnea, under Procedure Code Category, click Sleep Apnea.
- 3. To open the **Practice Definitions** dialog box, in the Office Manager, click **Maintenance**, and then click **Definitions**.

The **Practice Definitions** dialog box appears.

Practice Definitions	×
Definition Type Procedure Code Categories	
ID Definition Text	
13 Sleep Apnea	Add
1: Diagnostic 2: Preventive	Change
3: Restorative 4: Endototics	Delete
5: Periodontics 6: Prosth remov	
7: Maxillo Prosth 8: Imolant Sarv	
9: Prostho, fixed	
11: Orthodontics	
12. Adjunct Selv 13: Sleep Aprea	
14: Londitions 15: Other	
	Close

4. To view the Sleep Apnea category, under Definition Type, click Procedure Code Categories.

Note: You can now add up to five more custom Procedure Code Categories for a total of 20.

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Dentrix 24.19

Overview and New Features

This Dentrix 24.19 Release Guide provides information about the Dentrix 24.19 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.19.

Note: For information about using the new features in Dentrix 24.19, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.19?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.19 includes the following enhancements:

MISCELLANEOUS

- You can now import additional insurance benefit data (insurance plan details and exceptions and limitations) to the **Dental Insurance Benefits and Coverage** dialog box.
- In the Perio Chart, you can now select multiple teeth and chart probing depth, clinical attachment level, and bleeding with a single mouse click.
- An available updates indicator (green dot) now appears next to **Help** in the menu bar and the **Update Manager** option in the **Help** menu in the Patient Chart, Perio Chart, Treatment Planner, List Manager, and Appointment List.
- The Other Integrated Products for Dentrix pop-up screen was removed. (This screen appeared when you closed the DentrixLink screen.)

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Importing Insurance Plan Details and Exceptions and Limitations

You can now import additional eligibility and benefits data from the Appointment Book, the **Appointment Information** dialog box, or the Family File. If eligibility and benefits data are available to import, the eligibility icon appears as a green E on a white background (with a small red bubble in the upper-right corner of the icon).

To import insurance plan details and exceptions and limitations

- 1. In the Appointment Book, Family File, or Appointment Information dialog box, click the elegibility icon.
- 2. From the menu, click Import Insurance Benefit Details.

The Insurance Benefit Details dialog box appears.

- 3. Under Choose Network Plan, select the desired insurance plan from the list.
- 4. (Optional) To review the data before importing, click the desired tab.

Abbott, Ken - Insurance Benefit Details Import			-		×
=	Insurance Plan		Imp	ort	
Choose Network Plan*	Details				
Delta Dental PPO ~	Subscriber - Benefit Begin Date	01/01/2024			
Devicest Destalls	Patient - Benefit Begin Date	12/31/2024			
Patient Details	Insurance Plan Type	PPO			
O Deductibles and Maximums	Out of Network Benefits?	Yes			
= Coverages	Coordination of Benefits?	Standard			
/_ contrages	Missing Tooth Clause	Yes			
	Crowns /Bridge Paid On	Seat Date			

5. To import the data, click the **Import** button.

The **Do you want to Import?** dialog box appears.

6. To import, click Yes.

Note: By default, all options are selected. To restrict the import of an option, clear the appropriate check box.

7. To review the imported data, open the **Dental Insurance Benefits and Coverage** dialog box, and then click the appropriate tab.

Insurance Plan

Dental Insurance Benefit	s and Coverage	- Anthem BCBS Conr	ecticut / Test Plan /	[Primary Insura	nce]				×
Insurance Plan	Subscriber:		Benefit Begin Date	v <mark>√ 1/ 1/2024 ∨</mark> Sub	scriber ID C8Z09	71957175	Signature on File:		
Deductibles/Maximums	Patient:		Benefit Begin Date	✓ 12/31/2024			Assignment of Benefits	Continuing Care	
Coverage Table	Carrier:	Anthem BCBS Conne	cticut	Eligibility Coverage Level:	Family	•			
Exceptions	Group Plan:	Test Plan		Benefit Renewal	January	•			
Insurance Plan Notes	Phone:	Ext		Participating Providers*	Does not a	apply			
Payment Table &	Fax: Contact			Out-Of-Network Benefits*?	Yes	•			
Out-Of-Network	Web Page:			Claim Deadline					
Out-Of-Network	Email:			Waiting Period*	0 months				
Out-Of-Network	Carrier Contact By Prov/Staff ID	ted On: 8/28	2024 ~	Missing Tooth Clause*?	0 Yes	•			
Exceptions Out-Of-Network	Insurance Repr	resentative:		Crowns/Bridges Paid On	Seat Date	•			
Payment Table & Allowed Amounts									
8	Und	to	Updating any ber *Information only	nefit and coverage information - not included for insurance es	will affect all patient timate calculations.	nts who have th	is insurance plan.	Save	Close

Exceptions

E - Eligibility Benefit Details								- 0 X
Choose Network Plan*	Exceptions	& Limitatio	ns					Import
	Beg Proc	End Proc	Service Type	Waiting Period	Age Max	Age Min	Frequency Limits	Exception Note
Patient Details	D0120	D0120	Diagnostic				2 visit(s) per 1 year	
Deductibles and Maximums	D0140	D0140	Diagnostic				2 visit(s) per 1 year	
Coverages	D0150	D0150	Diagnostic	6 Months	36	16	2 visit(s) per 1 year	The maximums and deductibles for these services may be combined with other types of procedures, such as TMJ or Perio.
	D0180	D0180	Diagnostic				2 visit(s) per 1 year	
	D0210	D0210	Diagnostic				1 visit(s) per 60 month	
	D0220	D0220	Diagnostic				1 visit(s) per 60 month	
	D0230	D0230	Diagnostic				1 visit(s) per 60 month	
	D0270	D0270	Diagnostic				1 visit(s) per 12 month	
	D0272	D0272	Diagnostic				1 visit(s) per 12 month	
	D0274	D0274	Diagnostic				1 visit(s) per 12 month	
	D0330	D0330	Diagnostic				1 visit(s) per 60 month	

Selecting Multiple Teeth During Perio Exams

You can select multiple teeth and chart probing depth, clinical attachment level, and bleeding with a single mouse click.

To select multiple teeth during a Perio exam

1. Open the Perio Chart.

Note: If this is the selected patient's first perio exam, a new perio exam opens and the Data Chart is blank. If you saved a previous perio exam for the selected patient, that exam appears in the Data Chart. To save time, you can change only those measurements that have changed since the previous



exam. When you save your changes, a new exam is created with the current date, and both the changes you made and the unchanged measurements from the previous exam are saved.

- 2. From the Script Selection list on the toolbar, click **Dentrix Default Script**.
- 3. Click the upper-left corner of the Data Chart, and then drag the mouse pointer to the right.

A dotted-line rectangle appears, the selected tooth numbers change appearance, and yellow rectangles indicate PD and Bld.



 Under Tooth Information, enter a value for probing depth (PD), and if bleeding is present, click Bld. The probing depth measurement, clinical attachment level, and the bleeding indicator appear for all the selected teeth.

	entrix	Perio (Chart -	Davis	Karen	DDS1	1 (New	/ Exam	ı: 9/26,	/2024)							- 🗆 X
<u>F</u> ile	<u>V</u> iew	<u>S</u> etup	<u>H</u> el	p De	nnis S												
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		_				-	-	-	-	-	-	_	-	_	_		Perio 📮 🗙
	(1)	(2)	3	(4)	(5)	6	(7)	8	9	10	(11)	(12)	(13)	(14)) (15)	(16)	Data Entry
F PD	<u> </u>	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	Perio Navigation
GM		2	2	2	_	_	2	_	2	2	_	2	2	2	2		Current: 1 - F/D/PD
MGJ	i i	2	ľ	ľ	2	2	2	2	2	2	2	2	2	2	2	2	Next:
FG Bld		i -	i -		-					<u> </u>		<u> </u>		i -		<u>i</u> - 1	Prev:
Sup		•	-	-	· -	•	-	·	· -	-	-	· -	•	•	· -	·	Resume: 2 - F/D/PD
Sup	_																
Bld			•		•						•	•		•	•	•	Facial/ inqual Arch Home
FG MGJ	-	-	-		-	• • •					•••	-		-	· ·	-	Distal Mesial
CAL		2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	L C R
PD		2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	PD 2 7 8 9
L	M																
РМВ																	CAL: 4 5 6
РМВ																	MGJ: 1 2 3
L	M																
PD																	
CAL																	Clear Previous Bleeding
MGJ																	Sup:
Bld																	· · · · · · · · · · · · · · · · · · ·
Sup																	Mobility: 0 0 1 0 2 0 3 0 4
Sup																	Plaque: O None O Light O Moderate O Heavy
Bld FG																	Bone Loss: O None O Mild O Moderate O Severe
MGJ																	A Data Entry
GM						· ·			-								Exam Information
PD F	L							I	l					-			Summary
	(32)	(31)	30	(29)	(28)	(27)	(26)	(25)	(24)	(23)	(22)	(21)	(20)	19	18	(17)	×
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- 5. To change the probing depth and/or the bleeding indication for a tooth, select the desired tooth, and then under **Tooth Information**, do the following:
 - Type the desired PD measurement.

Note: The CAL measurement changes automatically to match the PD measurement.

• Click the **Bld** indicator to clear the bleeding icon in the Data Chart.

	entrix	Perio (Chart -	Davis	, Karer	DDS	1 (New	Exam	: 9/26/	(2024)								×
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1	0	1 2	0 1	6	Dav	is, Kare	en											
-						\sim	\sim	\sim	\sim		\sim	\sim	\sim	\sim	\sim	\sim	Perio 9	×
_	(1)	(2)	3	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	Data Entry	
F PD		1	2	2	2	2	2	2	2	2	2	2	2	2	2	2	Perio Navigation	^
GM			2	2	2	2	2	2	2	2	2	2	2	2	2	2	Current: 2 - F/C/PD	
MGJ		ľ	2	2	2	2	2	2	2	2	2	2	2	2	2	٤	Next: 2 - F/M/PD	
FG Bld	•	•	i -	i	• -	i	<u>.</u>	<u>.</u>		• • •		•	. · ·	i -	i -	· ·	← ↓ → Prev: 2 - F/D/PD	
Sup			•	Ť.	•	•	•	•	•	•	•	•	•	•	Ľ	•	Resume: 2 - F/C/PD	
Sup																	Tasik lafamatian	
Bld		•	•	•	•	0	0	•	•	•	•	•	•	•	•	•	Tooth #2 - Facial Facial/Lingual Arch Home	
FG MGJ	-	-	-		-							-		-	-	-	Distal Mesial	
CAL		2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	L C R	
PD		2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	PD 1 7 8 9	
L	M																	
РМВ																	CAL: 1	
PMB																	MGJ: 1 2 3	
L	M																FG: V F0: V	
PD																		
CAL																	Clear Previous Bleeding	
MGJ FG																	Sup:	
Bld																		
Sup																	Mobility:	
Sup																	Plaque: None Light Moderate Heavy	
FG																	Bone Loss: None Mild Moderate Severe	~
MGJ																	Pata Entry	
GM					· · · · · · · · · · · · · · · · · · ·				_								Exam Information	
PD F							I								I		🐉 Summary	
	32	31	30	29	28	(27)	26	25	24	23	22	(21)	20	19	18	(17)		»
Cli	nical N	otes																

Opening the Update Manager

A new menu item was added to the **Help** menu in the the Patient Chart, Perio Chart, Treatment Planner, List Manager, and Appointment List. Also, when an update is available a green dot now appears in the menu bar to the left of **Help**. The same green dot appears to the left of the **Update Manager** option in the **Help** menu.

To open the Update Manager

1. In the Patient Chart, Perio Chart, Treatment Planner, List Manager, or Appointment List, click Help, and then from the menu, click Update Manager.

Dentrix Office Manager - Dentrix Dental Practice					– 🗆 X
File Reports Letters & Custom Lists Maintenance Analysis Help					Dennis S
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The Update Manager appears.

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			Appointment Lists		~
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If an update is available, a green dot appears.

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	Chat with Support		
	Remote Assistance		
	Enhancement Request		
•	Update Manager		
	About Dentrix		

10 Dentrix 24.19

Dentrix 24.18

Overview and New Features

This Dentrix 24.18 Release Guide provides information about the Dentrix 24.18 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.18.

Note: For information about using the new features in Dentrix 24.18, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.18?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.18 includes the following enhancements:

MISCELLANEOUS

- If they are applicable, insurance plan provision details now appear under **Provisions** in a patient's eligibility details documentation in the Document Center. If no plan provision details are provided by the patient's insurance carrier, the phrase "**No Information Provided**" appears. A **Ded Applies** column was added to the eligibility details document to indicate whether a deductible applies to a procedure.
- An Import Progress indicator now appears in the lower-right of your screen when you import insurance benefit details. Depending on the amount of data being imported, the indicator may only appear briefly.
- The import confirmation text was updated to account for all import cases.
- Setting up the Payer Connection Portal now requires fewer mouse clicks.
- An available updates indicator now appears next to **Help** in the menu bar and the **Update Manager** option in the **Help** menu in the Office Manager, the Appointment Book, and the Family File.
- You can now change the date filter in the Signature Manager.
- By default, the Signature Manager now sorts by date instead of patient ID.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Viewing Plan Provisions and the Ded Applies Column

If they are applicable, insurance plan provision details now appear under **Provisions** in a patient's eligibility details documentation in the Document Center. If no plan provision details are provided by the patient's insurance carrier, the phrase "**No Information Provided**" appears. A **Ded Applies** column was added to the eligibility details document to indicate whether a deductible applies to a procedure.

To view Plan Provisions and the Ded Applies column

- In the Appointment Book or the Family File, click the desired eligibility icon. A menu appears.
- 2. Click View Eligibility Detail in Document Center.

The PDF document for the selected request opens detailing the patient's eligibility information.

3. Navigate to the Provisions and Coverage panels.

Notes:

- The **Provisions** panel displays up to 10 provisions. If no provisions were returned, the phrase "**No Information Provided**" appears in the panel.
- The **Ded Applies** column displays a **Yes** or **No** to indicate whether a deductible applies to a procedure. If no deductible information is returned (null or empty), the column is blank.

Downgrades? No	Pays on Prep or Seat Date	Lifetime Ma	ximum Used	\$0 \$3500	\$0 \$3500		\$0 \$3500			
NO	Seat	Lifetime De	ductible	\$500	\$500		\$350			
		Age Limit		< 18	< 18		< 18			
Payer Insurance Name Delta Dental	Payer ID Delta Dental of California	Coverage Service Type	Description		PPO	Premier	Out of Ded. r Network Applies		Waiting Period	
		Diagnostic Ser	vices							
Provisions • Waiting Period does not apply. • Second Molar Sealants - Permanent		D0120	Dental exam to asse identify necessary tr	ss oral health and eatments.	80%	90%	50%	No	None	
		D0140	Focused dental exa	m for a specific issue.	80%	90%	50%	No	None	
molars only, excl teeth.	molars only, excluding wisdom teeth.		Comprehensive ora history, typically for	l exam of dental r new patients.	80%	90%	50%	No	None	
molars only, excl teeth.	uding wisdom	D0180	Periodontal health	examination.	80%	90%	50%	No	None	
 Multi-visit proce the seat date. 	dures are pain on	D0210	Full-mouth teeth X-	rays.	80%	90%	50%	No	None	
 Composites are of Porcelain is not of 	downgraded. downgraded on	D0220	Single-tooth diagno	ostic image.	80%	90%	50%	No	None	
 Porcelain is down 	ngraded on molars.	D0230	Root structure diagr tooth.	nostic image of a single	80%	90%	50%	No	None	
		D0272	Two bitewing X-rays decay.	for checking tooth	80%	90%	50%	No	None	

Provisions	PPO	Premier	Out of Network	Ded. Applies	Waiting Period
	80%	90%	50%		None
No Information Dravided	80%	90%	50%	No	None
No Information Provided	80%	90%	50%	No	None
	80%	90%	50%	No	None
	80%	90%	50%	No	None
	80%	90%	50%	No	None
	80%	90%	50%	No	None
	80%	90%	50%	No	None

Import Progress Indicator and Import Confirmation Text

An Import Progress indicator now appears in the lower-right of your screen when you import insurance benefit details. Depending on the amount of data being imported, the indicator may only appear briefly. When the import is complete, the Import Progress indicator turns green and a green check mark appears next the phrase "Import Is Complete."

 			Tuesday - Septeni	ser 3, 2024			
 0P-1	0P-2	0P-3	0P4	OP-5	0P-6	0P-7	09-8
Robert Pellegrini - Eligibilit	y Benefit Details		-			- 0 X	
-							
Change Natural Real		Coverages				Import	
		IMPORTANT: A category marked	with an asterisk (")indicates a coverage % was n	ot returned by the insurance for one or mor	e code ranges.		
CISNA DPPO ADVANTASE		Therefore, the current coverage	& as saved in Dentrix is being used for those rang	es.			
		Diagnostic* (D0100 - D0999				~	
2 Patient Details							
(9) Deductibles and I	Assimume	Preventive* (D1000 - D1999)				~	
	Hadringing	Restorative* (D2000 - D299	9)			\sim	
III Coverages		Endodontics* (D3000 - D39	99)			~	
		Periodontics" (D4000 - D49	44)			~	
		Prosthodontics* (D5000 - D	5999)			~	
		Implants* (D6000 - D6199)				~	
		Oral Surgeont (D2000 - D29	99)			~	
		Gran Surgery (proco - pro	771			-	
		Orthodontics* (D8000 - D8	999)			~	
		Adjunctive* (D9000 - D9995	0			~	N
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							Terration of the second se

The import confirmation text was updated to account for all import cases.

Choose Network Plan*	Coverages	Do you want to import?	Import
CIGNA DPPO ADVANTAGE	IMPORTANT: A category ma Therefore, the current cover	Importing plan level benefit and coverage information will affect all patients who are tied to this insurance plan. Patient utilization and	or one or more code ranges.
	Diagnostic* (D0100 - D	history details are specific to the patient and will add the information to this patient only. Would you like to proceed?	~
Patient Details	Preventive* (D1000 - D	Select All	~
Deductibles and Maximums	Restorative* (D2000 - [Deductibles and Maximums	~
✓≡ Coverages	Endodontics* (D3000 -	Coverages	~
	Periodontics* (D4000 -		~
	Prosthodontics* (D500		~
	Implants* (D6000 - D6		~
	Oral Surgery* (D7000 -		~
	Orthodontics* (D8000		~
	Adjunctive* (D9000 - E	Yes No	~

Eligibility Pro Payer Maintenance

Setting up the Payer Connection Portal now requires fewer mouse clicks.

💺 Dentrix Office Manager - Dentrix De	ntal Practice		- 0	×
File Reports Letters & Custom Lists	Maintenance Analysis Help			
Image: Weight of the second	Reference Practice Setup Task Scheduler(Month End) Audit Trail Report(Standard)	>	Employer Maintenance Fee Schedule Maintenance Insurance Maintenance Eligibility Pro Payer Maintenance Referral Maintenance	2
	Audit Irail Report(Prov/Staff) Purge Exported Files Delete Finance Charges		Dental Ins Coverage Tables Insurance Claim Requirements	
	Delete Late Charges		Purge Dental Ins Benefits Used Zip Code/Area Code Change Utility	

Opening the Update Manager

A new menu item was added to the **Help** menu in the Office Manager, the Appointment Book, and the Family File to make it more convenient to open the Update Manager. Also, when an update is available a green dot now appears in the menu bar to the left of **Help**. The same green dot appears to the left of the **Update Manager** option in the **Help** menu.

To open the Update Manager

1. In the Office Manager, the Appointment Book, or the Family File, click **Help**, and then from the menu, click **Update Manager**.

File Reports Letters & Custom Lists Maintenance Analysis Help Dentrix Resource Center Dentrix Resource Center Dentrix Resource Center Image: Control of the
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04/20/2021 Depoter Sap 04/20/2021 Data Collections Disolaved
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04/21/2021 Deposit Sip Not Printed
04/27/2021 Day Steel Composing Not Printed

The Update Manager appears.

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Updates			Current version: 2	24.17.0.264	198
Updates Updates Settings For To	Update(s) Available New Codes Required update available Dentix 99.9.9 Required update available Older Update(s) Installed (2) Dentix 24.17.0.26499 Server First] Required update installed Server First] Required update installed Server First] Required update installed Server First] Required update installed	New Codes Required update available What's New in Dentrix Learn how to enter a new patient using the new update	Current version: Search IORE ESOURCES Dentrix Magazine Ventrix Magazine ystem Requirements	.00	MB
Ready			entrix Resource lenter Appointment Lists		~

If an update is available, a green dot appears.



Signature Manager Improvements

By default, the Signature Manager now sorts by date instead of patient ID. Previously, if you left the Signature Manager open at the end of the day, you could not refresh the date filter to include today's date. To refresh the filter you had to close the Signature Manager, and then reopen it. You can now click the **Refresh** button to refresh the date filter.

Important: If you enabled passwords, you must have the Modify Clinical Notes permission to open the Signature Manager and create or edit a clinical note.

To view the improvements to the Signature Manager

1. Open the Signature Manager.

Entries are sorted by date starting with the most recent.

-g-rate	and tyle	anager										0
n	/	•	•	$\overline{\mathbb{W}}$	Family File	Continuing Care	Lab Case Manager	Questionnaires	Health History	Treatment Planner	0	Suarantor Note
Sign/V Signat	iew	Print	Refresh	Chart	E Ledger	Appointments	Confice Manager	Perio Chart	R Prescriptions	Office Journal	8	Jocument Cen
	Sign	a & Mana	ige				De	entrix Modules				
<u>ه</u>	3/12/2	2024 - 9/1	1/2024 ¥	+ Filte	ers				Search note:		Q	🔯 Settings
		Appt. I	Date		Note Date		Patient	Provider		Status		
>		09/11/2	024		N/A	J	Winters, Carl	DDS1 - Sm	iith, Dennis	Missing		
>		09/11/2	024		N/A	3	oung, Bridgette	DDS1 - Sm	iith, Dennis	Missing		
>		09/04/2	024		N/A	l	Abernathy, Dolores	DDS3 - Co	ok, Maria	Missing		
>		09/04/2	024		N/A	E	lood, Teddy	DDS1 - Sm	iith, Dennis	Missing		
>		09/03/2	024		N/A	ç	<u> Sleason, Alice</u>	DDS1 - Sm	iith, Dennis	Missing		
>		09/03/2	024		N/A	1	Keller, Michelle	DDS1 - Sm	iith, Dennis	Missing		
>		09/03/2	024		N/A	E	ish, Dori	DDS3 - Co	ok, Maria	Missing		
>		08/29/2	024		08/29/2024	S	Gleason, Alice	DDS1 - Sm	iith, Dennis	Unsigned		
>		08/29/2	024		N/A	8	Keller, Michelle	DDS1 - Sm	iith, Dennis	Missing		

- 2. To change the sort order from most recent to least recent, click Appt. Date.
- 3. To refresh the date filter to include today's date, click the **Refresh** button.

8 Dentrix 24.18

Dentrix 24.17

Overview and New Features

This Dentrix 24.17 Release Guide provides information about the Dentrix 24.17 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.17.

Note: For information about using the new features in Dentrix 24.17, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.17?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.17 includes the following enhancements:

MISCELLANEOUS

- You can now change your password and set up security questions from any module by clicking the logged in user's name and selecting the desired option from the menu.
- The Update Manager window was modified to only show the most recent Dentrix update under **Update(s)** Available. Previous updates are listed under a new category called **Older Update(s)**.
- In the **Clinical Notes** panel, clinical notes created in the Signature Manager now include a time stamp indicating when they were created.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Changing Passwords and Setting Up Security Questions

You can now change your password and set up security questions from any module by clicking the logged in user's name and selecting the desired option from the menu.

To change a password and set up a security question

1. From a Dentrix module, click the logged in user's name on the right side of the menu bar.

A menu appears.

Dentrix Office Manager - Dentrix Dental Practice -	
File Reports Letters & Custom Lists Maintenance Analysis Help	Dennis S
	Ver User Display Preference > Change Password
Data Data Status	Password Security Questions Setup
02/03/2021 Daily Collectons Orginary Anno 2000	Log Out & Close Dentrix
02/09/2021 Daily Collections Displayed	
02/17/2021 Adding Report Disloved	
04/12/2021 Day Sheet [Dironological] Not Printed	
04/12/2021 [Day Sheet (Applicational) Displayed 04/12/2021 [Receiptin Day Sheet Net Pinked	
04/12/2021 Adjustment Day Sheet Not Printed	
04/12/2021 Deposit Sip 04/12/2021 Deposit Sip	
04/12/2021 Day Sheet (Dronological) Not Printed	
04/13/2021 Day Sheet (Alphabetical) Not Printed	
04/13/2021 Fleetept Day Sheet Net Firsted	
04/13/2021 Department of the method of the m	
04/13/2021 Daily Collections Not Printed	
04/14/2021 Uay Sheet [Livronological] Not Finited 04/14/2021 Day Sheet (Missianitan) Not Printed	
04/14/2021 Receipt Day Sheet Not Printed	
04/14/2021 Adjustment Day Sheet Not Printed	
04/14/2021 Deport bip Not Finited	
04/15/2021 Day Sheet (Chonological) Not Printed	
04/15/2021 Day Sheet (Alphabetical) Not Printed	
04/15/2021 Preceptor Volume Day Sheet Not Printed	
04/15/2021 Deposit Slip Not Piinted	
04/15/2021 Daily Collections Not Printed	
04/20/2021 [24] Sheet (Abinabetical] Not Printed	
04/20/2021 Receipts Day Sheet Not Printed	
04/20/2021 Adjustment Day Sheet Not Printed Not Printed	
04/20/2012 Date Collections Dislowed	
04/21/2021 Day Sheet (Chronological) Not Printed	
04/21/2021 [Day Sheet (Aphiobetical] Not Printed	
04/21/2021 Adduttment Day Sheet Not Pinted	
04/21/2021 Deposit Stp Not Printed	
04/21/2021 Day Sheet Discontinued Net Printed	

2. To change the user's password, click Change Password.

The Change Password dialog box appears.

Change Password	×
<u>U</u> ser ID:	DDS1
Current Password:	•••••
New Password:	•••••
Confirm Password:	•••••
A password must be a uppercase letter(A to number(0 to 9), and a Or, be more than 12 characters.	at least 8 characters consisting of at least 1 Z), at least 1 lowercase letter(a to z), at least 1 at least 1 other keyboard symbol(c.g. !, @, \$). characters and not have 2 consecutive 'space'
	OK Cancel

- 3. Complete the following, and then click OK.
 - Type the user's current password.
 - Type the user's new password.
 - Confirm the user's new password by retyping it.
- 4. To set up the user's security questions, click Password Security Questions Setup.

The Password - Password Administration dialog box appears.

Password - Pa	ssword Administration	×
User ID:	DDS1	
Password:		
		_
	OK Cancel	

5. Type the user's password, and then click OK.

The **Setup Security Questions** dialog box for the logged in user appears.

Setup Security Questions - DDS1		×
Security Questions	Please set up security identity and help rese	y questions. These questions will be used to verify your et your password if you ever forget it.
	An answer must be ty must be at least 5 ch	yped for each of the 3 selected questions. Each answer aracters.
	Security Questions Setu	.p
	Question 1:	– Please select a question – V
	Answer:	
	Question 2:	– Please select a question – $\qquad \lor$
	Answer:	
	Question 3:	– Please select a question – V
	Answer:	
		Save Cancel

6. Select a question from the list for each question, type an answer for each question, and then click Save.

The Update Manager

The Update Manager was modified to only list the most recent Dentrix update under **Update(s)** Available. Previous updates are listed under a new category called **Older Update(s)**. Any required update that is not the most recent update to Dentrix appears in the **Older Update(s)** list. Updates, such as CDA code updates, do not appear in this list.

To open the Update Manager

1. In any Dentrix module, click Help, and then from the menu, click About Dentrix.

The About Dentrix window appears.

2. Click Check for Updates.

The Update Manager appears.

C Update M	Manager			- 🗆 X
Updates				Current version: 24.17.0.26498
Updates	Update(s) Available Image: Second S	•	New Codes Required update available	
Pow To	Older Update(s) Installed (2) Dentris 24.17.0.26498 Generics 24.17.0.26498 Generics 24.17.0.26498	•	What's New in Dentrix	Search MORE RESOURCES
Ready	Vering Yrais (A-1/A) Server First) Required update Installed		Not Angelene Andel Not Angelene Andel	Dentrix Blog Dentrix Magazine System Requirements Dentrix Resource Center TAGS Appointment Lists

3. To view the Older Update(s) list, click the corresponding Down arrow.

Creating a Clinical Note Using the Signature Manager

A time stamp now appears in the **Clinical Notes** panel for clinical notes created in the Signature Manager.

Important: If you enabled passwords, you must have the Modify Clinical Notes permission to open the Signature Manager and create or edit a clinical note.

To create a clinical note using the Signature Manager

- 1. Open the Signature Manager.
- 2. To create and sign a clinical note, click a missing note for the desired patient.
- Click the Edit Note or Create Note icon in the upper-left corner of the text box. The Clinical Note dialog box appears.

n! 😑	•	Clinical Note for Abbott, Patricia (Pat): 9/3	/2024 11:27:51 AM [DDS2]		freatment Planner	Guarantor Notes
ign/View Print ignature	Refresh	📃 🧇 隆 🤜 🖊 🕎 🕹 🗳 Note :	2) 🙆 2/ 21 🖡 🔟 💇 - 🐁		Office Journal	Document Center
Sign & Manag	ge 2024 ¥			Administrative Anesthetics Clinical Exams Endedentics		२ 💱 Setting
Appt. D	ate 🔅			Fixed Prosthetics Hygiene	itus 👙	
> 03/14/20)24			Health History Orthodontics	sing	
• 03/14/20	024			Pedodontics Periodontics	sing	
Fo Missing n	ote.			Prescriptions Recommendations		
moonign				Removable Prostnetics Restorative Treatment		
> 03/14/20)24	1		• X-rays	sing	
> 03/14/20	024	1			sing	
> 03/14/20)24			Strue & Classe	sing	

4. Type or select a note from the template list.

- 5. Click Save & Close.
- In the Signature Manager, click Sign Note.
 The Sign Clinical Note dialog box appears.

Sign Clinical Note		
pen 5_	~	Clear
Name: Dennis Smith Junior, D.D.S.	>	Date: 9/3/2024
WARNING: Adding a signature to Clinical Note will prohibit any editing of the Clinical Note.	ОК	Cancel

- 7. Sign the note, and then click OK.
- 8. In the Patient Chart, click the Refresh toolbar button.

The time-stamped clinical note appears in the **Clinical Notes** panel.

Clinical Notes				1	X
💷 🗾 📾 🌚 🖉 🖾	9 & A 🗎 🏟				
Notes: 🔚 📄 Note :	k	創業 国 サーム		Ъ.	
9/3/2024 The patie	ient was given 3.50 total carpules of Articaine, 4% with Epinephrine 1:100,000, to achieve satisfactor	ory local anesthesia	🗆 Adminis	trative	^
11:27:51 AM [DDS2] results.			Cancelleo	Appt < 24-Hr Notice	
± 4/28/2023	Signed on Tuesday, September 3, 2024 by Dennis Smith Junior, D.D.S		Patient D	ismissed	
⊕ 12/16/2022 ⊕ 10/4/2022			Patient Fa	ailed Confirmed Appt	
L TOTOLOLL			Return Ap	opointment	
			New		
			Anesthe	etics	~
Progress Notes E Clinical Notes	Smart Image				

Dentrix 24.16

Overview and New Features

This Dentrix 24.16 Release Guide provides information about the Dentrix 24.16 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.16.

Note: For information about using the new features in Dentrix 24.16, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.16?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.16 includes the following enhancements:

MISCELLANEOUS

- Henry Schein One is introducing new insurance eligibility solutions in 2024. This new eligibility approach will replace our existing eligibility solution, which uses the eCentral Insurance Manager (and requires eSync and WebSync). Our new eligibility approach is an integrated and automated workflow that greatly simplifies the process of obtaining insurance eligibility information, delivering reliable and timely eligibility responses from top insurance payers. Eligibility information received from payers is formatted and saved in the Document Center.
- A Help button has been added to the Billing/Payment Agreement Information dialog box.
- The Use Office Fee column was removed from the Office fee schedule in the View/Edit Fee Schedule dialog box.
- A What's New button was added to the Appointment Book, the Family File, and the Office Manager.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

New Insurance Eligibilities Workflow

Tracking your patients' insurance information can be time consuming. You must verify that your patients' insurance plans are active and ensure that payment estimates are accurate. This may require your office staff to visit multiple insurance websites daily.

We've designed new features to make your eligibility workflow more efficient.

For existing customers, this new feature replaces our current eCentral Insurance Manager, which requires eSync and WebSync. To use this new service, your office must upgrade to Dentrix 24.16.

We're simplifying the process of requesting insurance eligibility information with an integrated and automated workflow—all within Dentrix. You'll receive reliable, timely responses from top insurance payers, all in a standardized form that's automatically saved to the Document Center.

More accurate, detailed, and faster eligibility responses help your staff provide patients with clear coverage details and enable you to provide quicker treatment decisions.

KEY FEATURES

- Stay in Dentrix: No more logging into eCentral.
- Higher rates of successful responses from payers.
- Real-time eligibility checks up to seven days before the patient appointment.
- Standard reports automatically saved to the Document Center.
- Writebacks to coverage tables for deductibles, maximums, and coverage percentages.
- Color-coded eligibility icons that easily indicate the patient's eligibility status in the Appointment Book and the Family File.

All these features will be available to you in Eligibility Essentials; however, with Eligibility Essentials, payers decide what data they provide you, and sometimes that isn't enough. That's why Henry Schein One is also offering Eligibility Pro to provide you with all the data you need. For example, Eligibility Pro provides all of the functionality of Eligibility Essentials, plus:

- Advanced Searches: Our API scours full insurance portals, pulling in data beyond traditional EDI, like patient history, frequency limitations, and procedure code level coverage percentages.
- Broader Coverage: Works with more payers and provides greater access to additional data.
- Flexible Payment Options:
 - **On-Demand:** Pay \$3.00 per eligibility request, with no minimum use or time commitment.
 - **Subscription:** Choose a monthly package for a lower cost per request. To learn more, please call 1-866-955-5694.

SETTING UP THE PAYER CONNECTION PORTAL

Before you can use Dentrix Eligibility Pro and obtain enhanced eligibility responses, you must set up your insurance website credentials through the Payer Connection Portal. By doing so, you can obtain the benefits and coverage data you need without having to visit each insurance website separately.

Notes:

• When you submit an eligibility request to an insurance carrier that supports web crawler, your credentials are used to access the carrier's website from which you can collect benefit and coverage details.

• Through the Payer Connection Portal, you can also maintain your credentials as they expire over time.

To set up the Payer Connection Portal

1. In the Office Manager, click Maintenance, point to Reference, point to Eligibility Pro Maintenance, and then click Launch Payer Connection Portal.

💺 Dentrix Office Manager - Dentrix Dent	tal Practice						
File Reports Letters & Custom Lists	Maintenance Analysis Help						
🕱 🕼 📔 🕼 🕰	Reference	>	Employer Maintenance	1 24 9	s s 🔉 🗊 🗊	INTX .	
	Practice Setup	p > Fee Schedule Maintenance		······································	-		
	Task Scheduler (Month End)		Insurance Maintenance				
	Audit Trail Report (Standard)		Eligibility Pro Maintenance	> Laun	ch Payer Connection Portal		
	Audit Trail Report (Prov/Staff)	Referral Maintenance					
	Purce Exported Files		Dental Ins Coverage				
	Delete Finance Charges		Insurance Claim Requirements				
Delete Late Charges			Purge Dental Ins Benefits Used				
			Zip Code/ Area Code Change Utility				
· · · · · · · · · · · · · · · · · · ·			-, ,				

You are logged in automatically to the Dentrix Payer Connection Portal, and your credentials are passed to tuuthfairy and stored. The **Payer Connection Portal** appears.

ONE Payer Connectio	n Portal		Hill-Davis De	ntal Group	Log Out
Payer Creden	tials	retrieval	l≩ + Net	v Payer Cri	edential
Payer Connection ©	Status ¢	Last Updated 😄	Payer Group	Actio	ns
AFLAC	⊘ Connected	Jun 18, 2024, 3:07 PM	AFLAC, AFLAC New York	0	Ō
Cigna	 Authentication Failed 	Jun 18, 2024, 3:06 PM	Cigna	õ	σ
Delta Dental Ins Co	Connected	Jun 13, 2024, 12:20 PM	AARP Dental Insurance Plan, Delta Dental Ins - Alabama, Delta Dental of California, Delta Dental of Delaware, Delta Dental Ins - Florida, Delta Dental ins - Georgia, Delta Dental Ins, Delta Dental Ins - Louisiana, Delta Dental of Maryind, Delta Dental Ins - Mississippi, Delta Dental Ins - Montana, Delta Dental Ins - Nevada, Delta Dental of New York, Delta Dental of Pennsylvania, Delta Dental Ori Puerto Rico, Delta Dental Ins - Texas, Delta Dental of Delta Dental of West Virginia	2	ō
Delta Dental of Idaho	Ocnnected	Jun 18, 2024, 3:08 PM	Delta Dental of Idaho	<u>ø</u>	ō
Delta Dental of Oregon	⊘ Connected	Jun 18, 2024, 3:11 PM	Delta Dental of Oregon	<u>ø</u>	ō

 From the Payer Connection Portal, click New Payer Credential. The New Payer Credentials dialog box appears.

Select	~
yer Username *	
Enter Username	
yer Password *	
Enter Password	٢
yer Password *	

3. From the Payer Connection list, select the desired payer.

A message appears explaining that several payers are included under the umbrella of the payer connection you selected.

Aetna	× ~
Aetna Connection Includes the fo	ollowing:
Aetna DMO, Aetna Medicare, Bell A	Atlantic, Choice Plus, Coventry
Health Plan, FlexCare, Mail Handle	rs Benefit Plan - MHBP, Marriott,
Preferred Dental Organization (PDC)), Prudential Administered by
Aetna, Southwestern Bell Exec - Ci	ustom Care, TWR, Varian Health
Gare Plan	
Payer Username	
Enter Username	
Enter Username Payer Password *	
Enter Username Payer Password * Enter Password	۲

4. Enter the **Payer Username** and **Payer Password** that your office uses to log in to the selected website, and then click **Save**.

If the payer requires two-factor authentication, the following notice appears.

NE Payer Connect	ion Portal		Primary Dental Hee	alth Group - Lehi, UT	Log
Payer Creden	tials			+ New Payer 0	Credenti
Payer Connection +	Status ÷	Last Updated ÷	Payer Group	Act	tions
Aetna	Connected	Oct 4, 2023, 6:27 AM	Aetra DMCA.etra Medicare, Bel Attaróc. Choice Pus, Cowerty Heath Par, FacCare, Mai Handles Benett Pan - MHBR Marriett, Perferred Dental Organization (PDO), Prudential Administered by Aetra, Southwestern Bel Exec - Custom Care, TWR, Varian Heath Care Pan	Ľ	0
AFLAC	Two-Factor Auth Required	Dec 14, 2023, 6:27 AM	AFLAC New York, AFLAG	Ľ	0

5. Once you receive the required authentication code, click **Two-Factor Auth Required**, enter the code, and then click **Verify**.

Dentrix completes the connection to the payer, and the **Payer Connection Portal** appears reporting your connection status with the payer websites.

NE Payer Connectio	on Portal		Hill-Davis De	ntal Group Log
ease provide the payers to co	onfigure credentials used for data r	etrieval		ar uyer oredenin
Payer Connection \$	Status #	Last Updated \$	Payer Group	Actions
AFLAC	⊘ Connected	Jun 18, 2024, 3:07 PM	AFLAC, AFLAC New York	2 0
Cigna	Authentication Failed	Jun 18, 2024, 3:06 PM	Cigna	2 ō
Delta Dental Ins Co	© Connected	Jun 13, 2024, 12:20 PM	AARP Dental Insurance Plan, Delta Dental Ins - Alabama, Delta Dental of California, Delta Dental of Delaware, Delta Dental Ins - Florida, Delta Dental Ins - Georgia, Delta Dental Ins - Delta Dental Ins - Louisiana, Delta Dental of Maryland, Delta Dental Ins - Mississippi. Delta Dental Ins - Mointana, Delta Dental Ins - Nevada, Delta Dental Ins - Mississippi. Dental Dental Ins - Mointana, Delta Dental Ins - Nevada, Delta Dental Ins - Mississippi. Dental Dental Ins - Mointana, Delta Dental Ins - Nevada, Delta Dental of New York, Delta Dental of Penenglyknaia, Delta Dental of West Virginia	2 0
Delta Dental of Idaho	O Connected	Jun 18, 2024, 3:08 PM	Delta Dental of Idaho	2 0
Delta Dental of Illinois	· Authenticatid	Jun 19, 2024, 1:07 PM	Delta Dental of Illinois	2 0
Delta Dental of Oregon	⊘ Connected	Jun 18, 2024, 3:11 PM	Delta Dental of Oregon	2 0
Delta Dental of Virginia	O Connected	Jun 18, 2024, 3:19 PM	Delta Dental of Virginia	1 5

6. If an authentication fails, click the Edit icon to the right of the payer list and verify the credentials you entered in the Edit Payer Credentials dialog box.

If an Eligibility Pro request is sent to a payer (either in a batch or on-demand), and that payer has a web connection, and the requesting office's web credentials are established, then tuuthfairy queries the web first to try to get the eligibility and benefits information from that web source (as it's the most complete).

Note: If the payer supports an EDI connection, tuuthfairy will access both web and EDI sources and merge the data to provide the most complete response possible as follows:

- If tuuthfairy can access data from both connections, the "source" in the PDF file will appear as "Web & EDI."
- If tuuthfairy can access data from only the web, the "source" in the PDF file will appear as "Web."
- If tuuthfairy is unable to access data from the web, it will try the EDI connection (if the payer has one). If the EDI is successful, the "source" in the PDF file will appear as "EDI."

Notes:

- Even though an Eligibility Pro response is requested, the software still returns EDI if it can't get a web response, so your office still receives a response. (You are only charged for Eligibility Pro responses if they are returned with a source of "Web" or "Web+EDI."
- Some payers (such as BCBSTX, Delta SD, Delta OR) do not support an EDI connection and are web only. In this case, if a web request fails, then EDI will return "Payer Not Participating." Our payer list will indicate what payers support which type of response.

VERIFYING ELIGIBILITY AND VIEWING ELIGIBILITY STATUS

When eligibility responses are returned, an eligibility indicator icon appears automatically in the Appointment Book and the Family File based on status. Eligibility indicator icons are color-coded (and independent of the color coding used for Appointment Book appointment background color, designating the provider) as follows:

• White E on Green Background – Patient is Eligible, and current data is already saved to the coverage tables.

	[
Mrs. Jones, Sandra	
LimitedEx	
H: (801)	
Delta Dental	
DTD1	
General	

E

• White E on Red Background – Patient is not eligible but was found successfully.

	E
NP-Gutierrez	_
CompEx	
H: (555)-555-5555	
Blue Cross Blue Shield	
DDS1	
General	
	224

• White E on Orange Background – Patient was not found (hover detail recommends verifying that the patient's name is correct).

	E
Mrs. Abbott, Sara	
PerioExam	
H: (801)1586	
Blue Cross Blue Shield	
DDS1	
General	
	24

• Green E on White Background (with small red corner box) – Patient is eligible, and new eligibility data is ready for review and approval to be saved to the coverage tables. (Once data is saved to the coverage tables, the icon changes to a white E on green background.) This icon appears for a patient whose eligibility has never been checked, or for one whose previous eligibility status has expired and the current eligibility request has returned new data.

	E
Mr. Jones, Steve	
LimitedEx	
H: (801)	
Delta Dental	
DTD1	
General	

Eligibility verification occurs automatically based on upcoming appointments:

- Eligibility requests run in batches every three hours for all appointments scheduled within the next seven days of the current month.
- Same-day appointments made within the current seven-day period are checked immediately without having to wait for the next batch of requests to run.
- Eligibility requests for appointments scheduled for the first six days of the following calendar month are held and checked on the first day of the new month. This ensures that you receive the most accurate results.

To verify eligibility and view eligibility status

1. In the Appointment Book or the Family File, hover your mouse pointer over the desired eligibility indicator icon.

A text box appears with details applicable to the request.

Note: Alternatively, you can click the appointment in the Appointment Book and open the Appointment Information dialog box.

2. To view eligibility detail, click the eligibility indicator.

A menu appears.

 Cooney, Dara PeriodicX, ProphyAd 	Request Eligibility Essentials Response	
• H: • DDS1	Request Eligibility Pro Response	
	View Eligibility Detail in Document Center	
	Enter Eligibility Status	
	Previous Eligibility Status	>

- 3. Click one of the following options:
 - Request Eligibility Essentials Response Click to update a patient's insurance information.
 - **Request Eligibility Pro Response** Click to download a more detailed eligibility report to the Document Center.

Note: If your office has Eligibility Essentials and you select **Request Eligibility Pro Response**, the following message appears:

Eligibility Pro requests require a Please complete this before pro transaction fee associated with t	n insurance connection setup, ceeding, as there is a these requests.
Do not show this warning f	for 30 days
Do not show this warning for the second s	for 30 days

4. Click Continue.

VIEWING ELIGIBILITY RESPONSES IN THE DOCUMENT CENTER

When eligibility responses are returned, they are automatically saved to the Document Center as PDF files.

To view an eligibility response

1. In the Appointment Book or the Family File, click the desired eligibility icon.

A menu appears.

 Bobertson, Annette N PeriodicX, ProphyAd H: DDS1 	Request Eligibility Essentials Response Request Eligibility Pro Response
	View Eligibility Detail in Document Center
	Enter Eligibility Status
	Previous Eligibility Status

2. Click View Eligibility Detail in Document Center.

The PDF document for the selected request opens detailing the patient's eligibility information.

C Eligible					Created: June 11, 2024 at 11:08 AM
				Transa	action ID: clxanojzg0jsot5uw7wdkq22l
Roberto Pere	egrino				Source: EDI
Patient		Deductibles and M	laximums		
First Name	Last Name	Deductible	Category	IN NETWORK	OUT OF NETWORK
Date of Pirth	Peregnito	Individual			
04-05-1972		Annual Amount	Dental Care	\$25	\$65
		Annual Remaining	Dental Care	\$25	\$65
Subscriber					
First Name	Last Name	Family			
Roberto	Peregrino	Annual Amount	Dental Care	\$75	\$185
Subscriber ID	Date of Birth	Annual Remaining	Dental Care	\$75	\$185
U69987195	04-05-1972				
Group Name	Group #	Maximum	Category	IN NETWORK	OUT OF NETWORK
HENRY SCHEIN ONE,	-	Individual			
lic		Annual Amount	Dental Care	\$2,500	\$1,500
		Annual Remaining	Dental Care	\$2,500	\$1,500

IMPORTING ELIGIBILITY AND BENEFITS DATA

You can import eligibility and benefits data from the Appointment Book, the **Appointment Information** dialog box, or the Family File. If eligibility and benefits data are available to import, the eligibility icon appears as a green E on a white background (with a small red bubble in the upper-right corner of the icon). The following conditions trigger the display of the icon:

- New patient eligibility request
- Existing patient eligibility request has expired

Caution: Importing the eligibility and benefits data for one patient on a selected plan updates that data for all patients on that plan.

Important: Importing eligibility and benefits data is optional. If available, the following data are imported:

- Deductibles Individual annual required and met, Individual lifetime required and met, and Family annual required and met.
- Maximums Individual annual benefit and used, Individual lifetime benefit and used, and Family annual benefit and used.
- Coverages Beg/End Procedure Code range, Benefit category, Coverage %, Deductible that applied (preventive, for example), and Co-pay.

To import eligibility and benefits data

1. In the Appointment Book, Family File, or **Appointment Information** dialog box, click the icon.

The following menu appears.

* Hanson, Brandy P * PeriodicX, ProphyAd	Import Insurance Benefit Details	
- H: - DDS1	Request Eligibility Essentials Response	
	Request Eligibility Pro Response	
	View Eligibility Detail in Document Center	
	Enter Eligibility Status	
	Previous Eligibility Status	>

2. Click Import Insurance Benefit Details.

Note: The information under **Patient Details** is pulled from Dentrix, is for information only, and is not imported.

The Insurance Benefit Details dialog box appears.

Patient Details Patient Details Deta Dentail PPO	Patient Details Patient Details Insurance Type Deta Denail Patient Details Patient Details </th <th> Choose Network Plan Deta Dental PPO Choose Network Plan Patient Details Patient Details Patient Details Patient Details Coverages Provider Name Tuuh Story NPI Tuuh Story NPI Tuuh Story Tuuh Story</th> <th>Dentrix - Insurance Benefit Details - Jones, Steve</th> <th></th> <th></th> <th></th> <th>- 0</th>	 Choose Network Plan Deta Dental PPO Choose Network Plan Patient Details Patient Details Patient Details Patient Details Coverages Provider Name Tuuh Story NPI Tuuh Story NPI Tuuh Story Tuuh Story	Dentrix - Insurance Benefit Details - Jones, Steve				- 0
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Tay ID 123455789	Tax ID 123456789	Tax ID 123456789		NPI	1234567	Group #	123456789
123-30103				Tax ID	123456789		

- 3. Under Choose Network Plan, select the desired insurance plan from the list.
- 4. To review the data before importing, click the following tabs:
Deductibles and Maximums

	Deductibles and	d Maximums					Import
noose Network Plan Delta Dental PPO ~	Deductibles	Individual Annual Required	Individual Annual Met	Individual Lifetime Required	Individual Lifetime Met	Family Annual Required	Family Annual Met
	Standard	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
Patient Details	Preventive	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
Deductibles and Maximums	Other	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
Coverages	Maximums	Individual Annual Benefit	Individual Annual Used	Individual Lifetime Benefit	Individual Lifetime Used	Family Annual Benefit	Family Annual Used
	Standard	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
	Other	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
	"Individual Annual ! Family Annual Used	Met, Individual Lifetime Met, provided via an insurance ver	Family Annual Met, Indiv ification request will not r	idual Annual Used, Individ eflect any unprocessed or o	ual Lifetime Used, and outstanding claims.		

Coverages

	Coverages					Import			
hoose Network Plan	Diagnostic Services	(D0100-D0999)							
Delta Dental PPO ~	Beg Proc	End Proc	Coverage %	Deductible	Co-Pay	Pre-Auth Required			
	D0120	D0999	80	Preventative	Not Provided	Not Provided			
Patient Details	Preventive Services	Preventive Services (D1000-D1999)							
Deductibles and Maximums	Restorative Service	s (D2000-D2699)		•					
Coverages	Endodontics (D3000	Endodontics (D3000-D3999)							
	Peridontics (D4000-	D4999)							
	Removable Prostho	Removable Prosthodontics (D5000-D5899)							
	Implant Services (D6000-D6199)								
	Fixed Prosthodontics (D6200-D6999)								
	Oral and Maxillofacial Surgery (D7000-D7999)								
	Orthodontics (D8000-D8999)								
	Adjunctive General	Services (D9000-D9999)							

To import the data, click the Import button.
 The Do you want to Import? dialog box appears.



6. To import Deductibles and Maximums and Coverages, click Yes.

Note: By default, both options are selected. To restrict the import of an option, clear the appropriate check box.

If the import was successful, a green check mark appears next to the option or options you chose to import. You can review the changes in the **Dental Insurance Benefits and Coverage** dialog box.

Billing/Payment Agreement Information Help Button

A Help button was added to the top-right corner of the **Billing/Payment Agreement Information** dialog box.

0-30	31-60	61-90	>90	Balance	Billing Type			
\$571.34	\$0.00	\$0.00	\$0.00	\$571.34	1: Standard Billi	ng - finance c	harges	
ast Payment:	\$25.00 - 5/12	/2023				Guar	rantor Notes	
Agreement Date: 8/17/2024 🔍 🛪 Agreement Templates Copy Agreement to Note								
	Interval:	Monthly ~	/			Agreemen	t Notes	
Annual Fina	ince Charge %	0.00	D			Late Charge	s	
Total A	greed Amount:	509.7	4	Annual Late Charge %:			000	
First	Payment Due:	8/17/2024		Grace Period (Days):			(
Pa	yment Amount:	0.0	D	Minim	um Late Charge:	0	0.00	
#	f of Payments:	0		Minimum Ba	lance to Charge:	().01	
Balance Rema	aining Rema	ning # of Payments	Missed Payments	Monthly Payment	Amount Past Due	Payment Due	Due Dat	
509.74		0	0	0.00	0.00	0.00	8/17/202	

Change to the View/Edit Fee Schedule Dialog Box

The Use Office Fee column was removed from the Office fee schedule in the View/Edit Fee Schedule dialog box.

View/Edit Fee Sc	hedule				×
Fee Schedule N Find Procedure					
Procedure Code	Fee #1 Office BEFORE	Fee #1 Office AFTER	Difference	^	Clear Clipboard
20999	\$0.00	\$0.00	\$0.00		Conv Erom
209999	\$0.00	\$0.00	\$0.00		Copy From
64550	\$0.00	\$0.00	\$0.00		Сору То
90620	\$0.00	\$0.00	\$0.00		Export
95831	\$0.00	\$0.00	\$0.00		Import
95868	\$0.00	\$0.00	\$0.00		import
97700	\$0.00	\$0.00	\$0.00		
CADCAMSI	\$0.00	\$0.00	\$0.00		
D0120	\$46.00	\$46.00	\$0.00		
D0140	\$70.00	\$70.00	\$0.00		
D0145	\$65.00	\$65.00	\$0.00		
D0150	e00.00	e90.00	e0.00	×	
			Save		Close

The What's New Button

A What's New button was added to the Family File, the Appointment Book, and the Office Manager. Clicking the button opens the What's New in Dentrix blog.

👼 Dentrix Family File - Crosby	y, Brent L [CR0	01]								×
File Edit Help									D)ennis S
🕅 🛃 🔌 💺 🗊 🖣	S & 🗆	🖅 🗔 @ 🗄 🗟 R 🧳 🕯]	2	8		I 😰 🕹		What's	New
,	Name: Mr. Cr Address: 6501 P.O. E Cisco Phone: H (80 F (801 Status: Active	rosby, Brent L E Oak Co Sox 110 Firs , UT 84515 Las 1)555-5663, W (801)555-6600 Missed 1)555-6669, M (801)555-1212, D (801)555-5901 (901)555-1212, D (801)555-5901	Static Chart # Choro pnsent: 03/07/2017 St#: 000-00-0005 st Visit: 03/07/2017 DL#: 11597894 st Visit: 07/24/2024 Birthday: 07/16/1976,48 J Appt: 03/06/2018.1 Provider: DD51 Fee Sched: Prov Default> E-Mail: IBrenCro@dentrix.com 10.10.102.00.000.000							
He	Health History Employer Chevron			Cont. 01/09/21 PANOREX 10/12/22 PROPHY Care 04/29/21 PERIO 04/12/23 BITEWINGS						
Pri	Primary Dental Insurance			Patient Notes						
G F D	Company: MetLife Group Plan: Chevron Group #: 87663 Fee Sched: Eligible: E Coverage: 1500.00 Used: 1480.00 Ded. S/P/O: 50/0/0 Met: 50/0/0 I Other Max:			(No Note)						
)>30 31>	60 61>90 91> Balance	Referred By							
В	Payment Ar Bill Type: 1 L	nt: NA Amt Past Due: NA ast Payment: 25.00 05/12/2023	Referred To							
	Status	Name	Position	Gender	Patient	Birthday				
	10rH Guar Ins	Litosby, Brent L Crosby, Shirley H	Married	Female	Yes	11/06/1979	Î			
							~			

14 Dentrix 24.16

Dentrix 24.15

Overview and New Features

This Dentrix 24.15 Release Guide provides information about the Dentrix 24.15 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.15.

Note: For information about using the new features in Dentrix 24.15, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.15?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.15 includes the following enhancements:

MISCELLANEOUS

- Henry Schein One is introducing new insurance eligibility solutions in 2024. This new eligibility approach will replace our existing eligibility solution, which uses the eCentral Insurance Manager (and requires eSync and WebSync). Our new eligibility approach is an integrated and automated workflow that greatly simplifies the process of obtaining insurance eligibility information, delivering reliable and timely eligibility responses from top insurance payers. Eligibility information received from payers is formatted and saved in the Document Center.
- The Chart # and SS# search options have been restored to the Select Patient dialog box.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

New Insurance Eligibilities Workflow

Tracking your patients' insurance information can be time consuming. You must verify that your patients' insurance plans are active and ensure that payment estimates are accurate. This may require your office staff to visit multiple insurance websites daily.

We've designed new features to make your eligibility workflow more efficient.

For existing customers, this new feature replaces our current eCentral Insurance Manager, which requires eSync and WebSync. To use this new service, your office must upgrade to the latest version of Dentrix.

We're simplifying the process of requesting insurance eligibility information with an integrated and automated workflow—all within Dentrix. You'll receive reliable, timely responses from top insurance payers, all in a standardized form that's automatically saved to the Document Center.

More accurate, detailed, and faster eligibility responses help your staff provide patients with clear coverage details and enable you to provide quicker treatment decisions.

KEY FEATURES

- Stay in Dentrix: No more logging into eCentral.
- Higher rates of successful responses from payers.
- Real-time eligibility checks up to seven days before the patient appointment.
- Standard reports automatically saved to the Document Center.
- Writebacks to coverage tables for deductibles, maximums, and coverage percentages.
- Color-coded eligibility icons that easily indicate the patient's eligibility status in the Appointment Book and the Family File.

All these features will be available to you in Eligibility Essentials; however, with Eligibility Essentials, payers decide what data they provide you, and sometimes that isn't enough. That's why Henry Schein One is also offering Eligibility Pro to provide you with all the data you need. For example, Eligibility Pro provides all of the functionality of Eligibility Essentials, plus:

- Advanced Searches: Our API scours full insurance portals, pulling in data beyond traditional EDI, like patient history, frequency limitations, and procedure code level coverage percentages.
- Broader Coverage: Works with more payers and provides greater access to additional data.
- Flexible Payment Options:
 - **On-Demand:** Pay \$3.00 per eligibility request, with no minimum use or time commitment.
 - **Subscription:** Choose a monthly package for a lower cost per request. To learn more, please call 1-866-955-5694.

SETTING UP THE PAYER CONNECTION PORTAL

Before you can use Dentrix Eligibility Pro and obtain enhanced eligibility responses, you must set up your insurance website credentials through the Payer Connection Portal. By doing so, you can obtain the benefits and coverage data you need without having to visit each insurance website separately.

Notes:

• When you submit an eligibility request to an insurance carrier that supports web crawler, your credentials are used to access the carrier's website from which you can collect benefit and coverage details.

• Through the Payer Connection Portal, you can also maintain your credentials as they expire over time.

To set up the Payer Connection Portal

1. In the Office Manager, click Maintenance, point to Reference, point to Eligibility Pro Maintenance, and then click Launch Payer Connection Portal.

Lentrix Office Manager - Dentrix Der	ntal Practice			
	Reference Practice Setup	>	Employer Maintenance Fee Schedule Maintenance	1 4 🛸 🗈 🕁 🛒 🗊 🕮
	Audit Trail Report (Standard) Audit Trail Report (Prov/Staff)		Eligibility Pro Maintenance Referral Maintenance	> Launch Payer Connection Portal
	Purge Exported Files Delete Finance Charges		Dental Ins Coverage Insurance Claim Requirements	
	Delete Late Charges	_	Purge Dental Ins Benefits Used Zip Code/ Area Code Change Utility	

You are logged in automatically to the Dentrix Payer Connection Portal, and your credentials are passed to tuuthfairy and stored. The **Payer Connection Portal** appears.

2. From the Payer Connection Portal, click New Payer Credential.

The New Payer Credentials dialog box appears.

	n Portal		Hill-Davis Den	tal Group	Log O
Payer Credent lease provide the payers to co	tials nfigure credentials used for data	retrieval	↓ New	Payer Cre	dential
Payer Connection \$	Status ¢	Last Updated 🌣	Payer Group	Actio	ns
AFLAC	⊘ Connected	Jun 18, 2024, 3:07 PM	AFLAC, AFLAC New York	<u>o</u>	ō
Cigna	Authentication Failed	Jun 18, 2024, 3:06 PM	Cigna	ø	o
Delta Dental Ins Co	⊘ Connected	Jun 13, 2024, 12:20 PM	AARP Dental Insurance Plan, Delta Dental Ins - Alabama, Delta Dental of California, Delta Dental of Delaware, Delta Dental Ins - Florida, Delta Dental Ins - Georgia, Delta Dental Ins, Delta Dental Ins - Louisiana, Delta Dental of Mayland, Delta Dental Ins - Missiaspip. Delta Dental Ins - Montana, Delta Oental Ins - Nevada, Delta Dental of New York, Delta Dental of Pennsylvania, Delta Dental Of Puerto Rico, Delta Dental Ins - Vissiaspi Delta Dental of Dental Ins - Montana, Delta Dental Ins - Nevada, Delta Dental of New York, Delta Dental of Dental Of Puerto Rico, Delta Dental Ins - Texas, Delta Dental Ins - Utah, Delta Dental of West Virginia	Ľ	ō
Delta Dental of Idaho	O Connected	Jun 18, 2024, 3:08 PM	Delta Dental of Idaho	2	ō
Delta Dental of Oregon	⊘ Connected	Jun 18, 2024, 3:11 PM	Delta Dental of Oregon	2	ō

3. From the Payer Connection list, select the desired payer.

A message appears explaining that several payers are included under the umbrella of the payer connection you selected.

Select	~
	· ·
Payer Username *	
Enter Username	
Payer Password *	
Enter Password	۲

4. Enter the **Payer Username** and **Payer Password** that your office uses to log in to the selected website, and then click **Save**.

If the payer requires two-factor authentication, the following notice appears.

		Primary Dental Hea	alth Group - Lehi, UT	Log Out
als jure credentials used for data retrieval.			+ New Payer O	Sredential
Status ÷	Last Updated ÷	Payer Group	Act	tions
Connected	Oct 4, 2023, 6:27 AM	Aetra DMO, Aetra Medicare, Beli Atlantic, Choice Pua, Coverlay Health Rav, FiexCare, Mai Handlers Benefit Pian - MHBP, Marriott, Preferred Dental Organization (PDO), Prudential Administend by Aetra, Southwestern Bel Exec - Custom Care, TWR, Varian Health Care Pian	Ľ	Ū
1 Two-Factor Auth Required	Dec 14, 2023, 6:27 AM	AFLAC New York, AFLAC	Ľ	0
	315 us credentais used for sites refreed. Status = @ Devented Text-Status Auth Resulted	Status :: Last Updated :: © Developmentation Oct 4, 2023, 6:27 AM © Two Factor Auth Resulted Dec 14, 2023, 6:27 AM	Status * Last Updated * Payer Group @ Downested Oct 4, 2023, 6:27 AM Artis Medicare, Bel Attrotic, Choice Plus, Covertry Health Plus, FlexCare, Mail Handlers Benetit Plan - MHBP Mannatt, Preferred Danata Organization (POL), Prudential Administed by Antra, Southweatern Bel Eare - Custom Care, TMR, Varian Health Care Plan @ Two-Exotor Auth. Heauted Dec 14, 2023, 6:27 AM APLCA New York, ALAC	Beneficial Status * Last Updated * Payer Group Act Coversy testin Pay. PiscQare, Mail Handlers Benefit Pain - MetBP Marriet, Pieterred Oct 4, 2023, 6:27 AM Arta DMO, Anna Medicare, Bel Atteric, Cooker Pus, Southerstern Bel Ease - Custon Care, YUR, Waran Heath Care Pian Dec 14, 2023, 6:27 AM Arta DMO, Anna Medicare, Bel Atterice, Cooker Pus, Southerstern Bel Ease - Custon Care, YUR, Waran Heath Care Pian Dec 14, 2023, 6:27 AM Arta DMO, Anna Medicare, Bel Atterice, Cooker Pus, Southerstern Bel Ease - Custon Care, YUR, Waran Heath Care Pian Dec 14, 2023, 6:27 AM Arta DMO, Artic Vertice, AFAC

5. Once you receive the required authentication code, click **Two-Factor Auth Required**, enter the code, and then click **Verify**.

Dentrix completes the connection to the payer, and the **Payer Connection Portal** appears reporting your connection status with the payer websites.

ONE Payer Connection Portal Hill-Davis Denta					
Please provide the payers to co	onfigure credentials used for data r	etrieval	+ ne	w Payer Gre	aenuai
Payer Connection \$	Status ¢	Last Updated \$	Payer Group	Action	15
AFLAC	⊘ Connected	Jun 18, 2024, 3:07 PM	AFLAC, AFLAC New York	<u>e</u>	Ō
Cigna	 Authentication Failed 	Jun 18, 2024, 3:06 PM	Cigna	0	Ō
Delta Dental Ins Co	Connected	Jun 13, 2024, 12:20 PM	AARP Dental Insurance Plan, Delta Dental Ins - Alabama, Delta Dental of California, Delta Dental of Delaware, Delta Dental Ins - Florida, Delta Dental Ins - Georgia, Delta Dental Ins - Louisana, Delta Dental Ortal Maryland, Delta Dental Ins - Mississiph, Delta Dental Ins - Mointana, Delta Dental of Maryland, Delta Dental Ins - Mississiph, Dental Dental Ins - Mointana, Delta Dental Ins - Nevada, Delta Dental Ins - Mississiph, Dental Dental Ins - Mointana, Delta Dental Ins - Nevada, Delta Dental Ins - Mississiph, Dental of Pensylvania, Delta Dental of West Virginia	Ż	ō
Delta Dental of Idaho	⊘ Connected	Jun 18, 2024, 3:08 PM	Delta Dental of Idaho	<u>ø</u>	Ô
Delta Dental of Illinois	· Authenticatid Pending	Jun 19, 2024, 1:07 PM	Delta Dental of Illinois	Ø	Ō
Delta Dental of Oregon	 Connected 	Jun 18, 2024, 3:11 PM	Delta Dental of Oregon	<u>ø</u>	Ō
Delta Dental of Virginia	O Connected	Jun 18, 2024, 3:19 PM	Delta Dental of Virginia	i	Ē

6. If an authentication fails, click the Edit icon to the right of the payer list and verify the credentials you entered in the Edit Payer Credentials dialog box.

VERIFYING ELIGIBILITY AND VIEWING ELIGIBILITY STATUS

When eligibility responses are returned, an eligibility indicator icon appears automatically in the Appointment Book and the Family File based on status. Eligibility indicator icons are color-coded

(and independent of the color coding used for Appointment Book appointment background color, designating the provider) as follows:

• White E on Green Background – Patient is Eligible, and current data is already saved to the coverage tables.



• White E on Red Background – Patient is not eligible but was found successfully.



• White E on Orange Background – Patient was not found (hover detail recommends verifying that the patient's name is correct).

Mrs. Abbott, Sara	
PerioExam	
H: (801)	
Blue Cross Blue Shield	
DDS1	
General	
	20

• Green E on White Background (with small red corner box) – Patient is eligible, and new eligibility data is ready for review and approval to be saved to the coverage tables. (Once data is saved to the coverage tables, the icon changes to a white E on green background.) This icon appears for a patient whose eligibility has never been checked, or for one whose previous eligibility status has expired and the current eligibility request has returned new data.

Mr. Jones, Steve LimitedEx H: (801)	ľ
General	**

Eligibility verification occurs automatically based on upcoming appointments:

- Eligibility requests run in batches every three hours for all appointments scheduled within the next seven days of the current month.
- Same-day appointments made within the current seven-day period are checked immediately without having to wait for the next batch of requests to run.
- Eligibility requests for appointments scheduled for the first six days of the following calendar month are held and checked on the first day of the new month. This ensures that you receive the most accurate results.

To verify eligibility and view eligibility status

1. In the Appointment Book or the Family File, hover your mouse pointer over the desired eligibility indicator icon.

A text box appears with details applicable to the request.

Note: Alternatively, you can click the appointment in the Appointment Book and open the Appointment Information dialog box.

2. To view eligibility detail, click the eligibility indicator.

A menu appears.

Mr. Abbot, Ken PeriodicX H: (801)-797-1586 Delta Dental DTD1 General	Request Eligibility Essentials Response Request Eligibility Pro Response View Eligibility Detail (PDF) Enter Eligibility Status
---	--

3. Click View Eligibility Detail (PDF).

The Eligibility Detail Form appears.

© Eligible Ken Abbo	ot				Crea	ted: Apr 23, Transact	2024 at 3 ion ID: 123 Sour
Patient		Orthodontics	*				
First Name	Last Name	Service Type	PPO	Premier		Out of Netw	ork
Date of Birth	Relationship to	Orthodontics Coverage	50%			25%	
06-29-1982	Subscriber Spouse	Coverage					
Cubarillas		Service Type		PPO	Premier	Out of Network	Period
Subscriber		Diagnostic Services		80%		50%	
First Name Ken	Last Name Abbot	Preventative Services		80%		50%	
Subscriber ID	Date of Birth	Restorative Services		80%		50%	
987654321	04-2-1983	Endodontics		80%		50%	
Group Name	Group #	Peridontics		80%		50%	
HSI	123456789	Removable Prosthodontics		80%		50%	
		Implant Services		80%		50%	
Provider		Fixed Prosthodontics		80%		50%	
First Name Daniel	Last Name Howser	Oral and Maxillofacial Surgery		80%		50%	
NDI		Orthodontics		80%		50%	
4566539726		Adjunctive General Services		80%		50%	
Plan Plan Name Delta Dental PPO Effective Date 0/01/2024 Plan Start 0/01/2024	Insurance Type PPO Plan Period Calendar Plan End 12/31/2024						

4. Click Close.

Searching for Patients Using Advanced Search

You can search for patients by last name, first name, preferred name, home phone number, chart number, or Social Security number.

To search for a patient using advanced search

- In the File menu of any Dentrix module except the Office Manager, click Select Patient. The Select Patient dialog box appears.
- 2. Click the Advanced Search tab.

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						Show On Screen Keyl	poard 💽		
	Loot N	Inmo:		Chart #]				
	Last								
	First N	lame:		SS #:					
Pi	referred N	lame:	E	Birthday:	/_/				
	s	tatus: Z Patient		Phone					
		Non-Pati	ent	(Mobile	Home Work Other)				
		Inactive	_	(mobile,	monie, mone, ealery				
		Archived		Search	Clear				
	HoH	Last Name	First Name	MI	Preferred Name	Phone	Chart #	SSN	Birthday
	HoH *	Last Name Davis	/ First Name Karen	MI	Preferred Name	Phone	Chart # DA0003	SSN 000-00-0007	Birthday 1/15/1984
	HoH *	Last Name Davis	/ First Name Karen	MI	Preferred Name	Phone	Chart # DA0003	SSN 000-00-0007	Birthday 1/15/1984
net	HoH •	Last Name Davis	/ First Name Karen	MI	Preferred Name	Phone	Chart # DA0003	SSN 000-00-0007	Birthday 1/15/1984
rev	HoH • viously Se	Last Name Davis	First Name	MI	Preferred Name Preferred Name	Phone	Chart # DA0003	SSN 000-00-0007 SSN	Birthday Birthday
re	Viously Se	Last Name Davis	/ First Name Karen First Name Karen	MI	Preferred Name Preferred Name	Phone Phone (801)555-1781 [M]	Chart # DA0003	SSN 000-00-0007 SSN 000-00-0007	Birthday 1/15/1984 Birthday 1/15/1984
re	Viously Se HoH	Last Name Davis	/ First Name Karen First Name Karen Brent	MI	Preferred Name Preferred Name	Phone Phone Phone (01)555-1781 [M] (01)555-1781 [M] (01)555-1781 [M]	Chart # DA0003	SSN 000-00-0007 SSN 000-00-0007 000-00-0007 000-00-0007	Birthday 1/15/1984 Birthday 1/15/1984 1/15/1984
nev	Viously Se HoH	Last Name Davis lected Patients Last Name Davis Crosby Frazier	First Name Karen First Name Karen Bient John	MI	Preferred Name Preferred Name	Phone Phone (801)555-1781 [M] (801)555-1781 [M] (801)555-7255 [M] (801)555-7255 [M]	Chart # DA0003	SSN 000-00-0007 SSN 000-00-0007 000-00-0007 000-00-0007 000-00-0007	Birthday 1/15/1984 Birthday 1/15/1984 7/16/1976 11/15/1985

- 3. To search for a patient, in the corresponding text box, specify one of the following:
 - Last Name Type the patient's last name.

Note: You can also search by the patient's first or preferred names.

- Status Select one of the available options to narrow your search.
- Chart # Type the first few characters of the patient's chart.
- **SS #** Type the first few numbers of the patient's Social Security number.
- Birthday Type the patient's birthdate.
- Phone Type the first few digits of the patient's phone number.

The patient's name and information appear in the list.

4. Click OK.

Dentrix 24.14

Overview and New Features

This Dentrix 24.14 Release Guide provides information about the Dentrix 24.14 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.14.

Note: For information about using the new features in Dentrix 24.14, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.14?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.14 includes the following enhancements:

MISCELLANEOUS

- A new paint type with the user code "Hydrxyapa" commonly referred to as "remineralization" has been added to Dentrix. The paint type is assigned to procedure code D2991 and marks selected teeth in the Patient Chart with the letter "R." For more information, please refer to "Adding treatment using the Procedure Codes panel" in the Dentrix Help.
- If a patient's mobile phone number is saved in the Family File, you can send the patient a text reminder using the **Form Status** dialog box.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Applying Treatment in the Procedure Codes Panel

A new paint type with the user code "Hydrxyapa" commonly referred to as "remineralization" has been added to Dentrix. The paint type is assigned to procedure code D2991 and marks selected teeth in the Patient Chart with the letter "R."

To apply treatment in the Procedure Codes panel

- 1. In the Patient Chart, click the tooth or teeth that require treatment.
- 2. In the **Procedure Codes** panel, type at least three characters of the desired procedure code in the search box.

Codes corresponding to the characters you typed appear.



- 3. Click the desired code, and then click the Post icon in the Procedure Codes panel.
- Click the Completed icon in the Charting toolbar. The selected tooth and/or teeth are painted with the letter R.

🖇 Dentrix Patient Chart - Crosby, Brent L [CR001]		– 🗆 X
<u>File Options View Setup H</u> elp Dennis S		
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The Research Nation In Chinad Maters III Constantian		

Progress Notes E Clinical Notes Smart Image

Viewing Patient Forms Status in the Appointment Book

The current status of online patient forms is received through eSync and automatically updated in the Appointment Book for forms corresponding to patients' appointments. A form status indicator appears in the Appointment Book for any appointments that have received patient form updates. Form status indicators are color coded as follows:

- A green checkmark means that the patient has completed all forms.
- X A red X means that one or more patient forms are incomplete.
- A yellow checkmark means that one or more patient forms need to be synced online.
- No indicator means that patient forms have not been created or made available for the patient or that no status updates have yet been received for the patient's forms.

To view the status of a patient's forms in the Appointment Book

1. In the Appointment Book, hover your mouse pointer over the desired form status indicator to see a brief explanation of the status of the patient's forms.

	LimitedEx, FMX La La LongEx, FMX L H:(555)555-5555 Form(s) Incomplete 7-332 DDS1
XXX	U189 X U418 General X General Mr. Winters, Carl III X
XXX	CompEx, FMX, Pano X Wk: H:(801)797-5495 X 000-00-0026 DDS1
X	0300

2. Click the form status indicator on the appointment to see details regarding the status of each patient form, sync forms as applicable, and send a text reminder to the patient to complete their forms online as needed.

The Form Status dialog box appears showing the status for each patient form and any applicable actions depending on status.

- If the form has a **Complete** status, a view form (eye) icon appears in the **Actions** column.
- If one or more forms has an Incomplete status, a **Remind Patient** button appears at the bottom of the dialog box.
- If one of more forms has a **Sync Required** status, a **Sync Forms** button appears at the bottom of the dialog box.

Form Status: Crosby, Brent				>	×
Form	Status	Reminder Sent		Actions	
Patient Registration Form	Complete			۲	
Insurance Information Form	A Incomplete				
Medical History Form	A Sync Required				
			Sync Forms	Remind Patient	

3. To view a completed form, click the view form (eye) icon in the Actions column.

The Document Center window appears with the completed online form selected under the **Patient Information** type.

[
a Dentrix Document Center - Crosby, Brent L [CR0001]			- 0	\times
<u>File E</u> dit <u>V</u> iew <u>A</u> cquire <u>S</u> etup <u>H</u> elp John S				
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🔒 🧟 🖪 📣 🕡 Crosby, Brent L				
🔗 • 🗟 🖡 늘 🔟 📁 🔎 🚺 🎒 🗗 😭 🐘	à 📾 👖 .			
Crosby, Brent L [CR0001] Page(s)				^
- 🏷 Patient Information				
7/17/2024:Patient Registration For				
	Dentrix Dental Practice			
Partie and Parties	Phone: (801)555-0100			
Market	Address: 1220 South 630 East	American Fork UT US 84003		
ter i Er Er	Patient Registration Form			
Page 1	Response Date: 07/17/2024 1	0.33.23		
	Response Source: Other	0.0020		
	Hote.			
	Patient Information			
	Review Patient Information		Patient Address	
			 Address Street 	
	Patient Demograph	ics	O Address City	
	First Name	Brent	G Zin Code	
	Last Name	Crosby	S Zip Code	~
				>
Page 1 of 1		4	🕷 📡 💠 🔎 🖉 🙆 60%	~
By Patient - All Dates - All Types				.:

4. To send a text reminder to the patient to fill out any forms that are incomplete, click the **Remind Patient** button.

A text message with a link to complete the forms online is sent to the patient's mobile number (as entered in Family File) and the current date and time is displayed in the **Reminder Sent** column.

Note: If the patient does not have a mobile number entered in the Family File, the **Remind Patient** button is disabled. Once a mobile number has been entered for the patient, the button will become enabled.

Form Status: Crosby, Brent					×
Reminder Sent					
Form	Status	Reminder Sent		Actions	
Patient Registration Form	Complete			۲	
Insurance Information Form	A Incomplete	July 23, at 2:31 pm			
Medical History Form	A Sync Required				
			Sync Forms	Remind Patient	
Insurance Information Form	▲ Incomplete	July 23, at 2:31 pm	Sync Forms	Remind Patient	

5. To sync the data for any forms that require it, click the **Sync Forms** button.

The patient forms website opens, allowing you to perform the necessary sync for your patient forms.

Dentrix 24.13

Overview and New Features

This Dentrix 24.13 Release Guide provides information about the Dentrix 24.13 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.13.

Note: For information about using the new features in Dentrix 24.13, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.13?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.13 includes the following enhancements:

BUG FIXES

- If you previewed a claim and printed it, only a "Yes" box appeared in Box 43 of the 2024 claim format instead of a "No" and "Yes" box.
- If you entered an invalid reason code, secondary claims failed to validate through DentalXChange.
- If you clicked the subscriber selection icon in the **Insurance Information** dialog box, you could select the same plan both for Primary and Secondary insurance coverage. This is no longer allowed.
- If you closed the **More Information** dialog box, the selected patient was removed from the Patient Chart.
- If you clicked the More Information toolbar button in the Patient Chart, the **Smart Image** panel was disabled.
- If you created an appointment from a completed new patient appointment, the appointment was labeled a new patient appointment until you reopened the Appointment Book.
- If you opened the **Dental Insurance Benefits and Coverage** dialog box from an appointment block to update Deductibles/Maximums, an error occurred.
- If you did not save changes in the **Dental Insurance Benefits and Coverage** dialog box, the dialog box stopped responding.
- If you changed the payment date or payment amount of a claim, the Ledger stopped responding.
- Resolved search result inconsistencies in the **Select Patient** dialog box.

Dentrix 24.12

Overview and New Features

This Dentrix 24.12 Release Guide provides information about the Dentrix 24.12 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.12.

Note: For information about using the new features in Dentrix 24.12, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.12?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.12 includes the following enhancements:

MISCELLANEOUS

• Dentrix Eligibility Pro (Beta) helps ensure that you have access to the most accurate insurance eligibility information.

Important: Dentrix Eligibility Pro is currently in Beta testing and is limited to a selected group of offices. As the Beta testing continues, more offices will be added. Additionally, to use Dentrix Eligibility Pro, you must have an eTrans ID and be on the latest version of Dentrix.

- If your patients make changes online to their medical conditions, allergies, medications, or contacts in Patient Forms, those changes are now reflected in Health History. These changes are marked by a purple badge to the right of the section header and a purple dot next to the updated item. For more information, please refer to <u>Health History overview</u> or <u>Patient Forms overview</u> in the Dentrix Help.
- If you have a current Customer Service Plan (CSP), you can now contact Customer Support using Dentrix Chat. For more information, please refer to <u>Contacting Customer Support using Dentrix Chat</u> in the Dentrix Help.
- The Select Patient dialog box was modified to open faster. The available search options in the Search By and Advanced Search tabs were also modified. You can no longer search for patients by their Social Security number or Chart number. For more information, please refer to <u>Selecting and searching for patients overview</u> in the Dentrix Help.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Dentrix Eligibility Pro (Beta)

Tracking your patients' insurance information can be time consuming. You must verify that your patients' insurance plans are active and ensure that payment estimates are accurate. This may require your office staff to visit multiple insurance websites daily.

Verifying a patient's insurance eligibility and understanding a patient's insurance plan benefits are key to ensuring that you are compensated appropriately for the care you provide your patients and that your patients enjoy the full benefits to which they are entitled.

SETTING UP THE PAYER CONNECTION PORTAL

Before you can use Dentrix Eligibility Pro and obtain enhanced eligibility responses, you must set up your insurance website credentials through the Payer Connection Portal. By doing so, you can obtain the benefits and coverage data you need without having to visit each insurance website separately.

Notes:

- When you submit an eligibility request to an insurance carrier that supports web crawler, your credentials are used to access the carrier's website from which you can collect benefit and coverage details.
- Through the Payer Connection Portal, you can also maintain your credentials as they expire over time.

To set up the Payer Connection Portal

1. In the Office Manager, click **Maintenance**, point to **Reference**, point to **Eligibility Pro Maintenance**, and then click **Launch Payer Connection Portal**.

🐓 Dentrix Office Manager - Dentrix Der	ntal Practice					
File Reports Letters & Custom Lists	Maintenance Analysis Help					
	Reference	>	Employer Maintenance	1 2 4	8 6 A 🛛 🗊	
N 🔤 📓 🐨 🐭 🖉	Practice Setup	>	Fee Schedule Maintenance		🖉 🖸 📑 🎥 🛅	-
	Task Scheduler (Month End)		Insurance Maintenance			
	Audit Trail Report (Standard)		Eligibility Pro Maintenance	> Laun	ch Payer Connection Portal	
	Audit Trail Report (Prov/Staff)		Referral Maintenance			
	Purge Exported Files		Dental Ins Coverage			
	Delete Finance Charges		Insurance Claim Requirements			
	Delete Late Charges		Purge Dental Ins Benefits Used			
			Zip Code/ Area Code Change Utility			

You are logged in automatically to the Dentrix Payer Connection Portal, and your credentials are passed to tuuthfairy and stored. The **Payer Connection Portal** appears.

NE Payer Connectio	n Portal		Hill-Davis Der	ital Group	Log O
Payer Creden	tials onfigure credentials used for data	retrieval	L₂ + Nev	Payer Cri	edential
Payer Connection 😄	Status ¢	Last Updated 😄	Payer Group	Actio	ns
AFLAC	⊘ Connected	Jun 18, 2024, 3:07 PM	AFLAC, AFLAC New York	<u>o</u>	Ō
Cigna	 Authentication Failed 	Jun 18, 2024, 3:06 PM	Cigna	ð	σ
Delta Dental Ins Co	Oconnected	Jun 13, 2024, 12:20 PM	AARP Dental Insurance Plan, Delta Dental Ins - Alabama, Delta Dental of California, Delta Dental of Delaware, Delta Dental Ins - Florida, Delta Dental ins - Georgia, Delta Dental Ins - Delta Dental Ins - Louisiana, Delta Dental of Manyind, Delta Dental Ins - Missiaspi, Delta Dental Ins - Montana, Delta Dental Ins - Nevada, Delta Dental of New York, Delta Dental of Pennsylvania, Delta Denta Of Puerto Rico, Delta Dental Ins - Texas, Delta Dental of Delta Dental of West Virginia	Ľ	Ō
Delta Dental of Idaho	Connected	Jun 18, 2024, 3:08 PM	Delta Dental of Idaho	Ø	ō
Delta Dental of Oregon	⊘ Connected	Jun 18, 2024, 3:11 PM	Delta Dental of Oregon	ø	ō

2. From the Payer Connection Portal, click New Payer Credential.

The New Payer Credentials dialog box appears.

Payer Connection * (i)	
Select	~
Payer Username *	
Enter Username	
Payer Password *	
Enter Password	٢

3. From the Payer Connection list, select the desired payer.

A message appears explaining that several payers are included under the umbrella of the payer connection you selected.

rajor commodant ()	
Aetna	× ~
Aetna Connection Includes the follow	ving:
Aetna DMO, Aetna Medicare, Bell Atlan	tic, Choice Plus, Coventry
Health Plan, FlexCare, Mail Handlers Be	enefit Plan - MHBP, Marriott,
Preferred Dental Organization (PDO), Pr	udential Administered by
Aetna, Southwestern Bell Exec - Custor	m Gare, TWR, Varian Health
Gare Plan	
Payer Username	
	8
Enter Username	
Enter Username Payer Password *	
Enter Username Payer Password * Enter Password	۲

4. Enter the Payer Username and Payer Password that your office uses to log in to the selected website, and then click Save.

If the payer requires two-factor authentication, the following notice appears.

ONE Payer Connect	ion Portal		Primary Dental Hec	alth Group - Lehi, UT	Log Out
Payer Creden	itials onligure credentials used for data retrieval.			+ New Payer (Credential
Payer Connection +	Status +	Last Updated +	Payer Group	Ac	tions
Aetna	Connected	Oct 4, 2023, 6:27 AM	Aetra DMO, Aetra Medicare, Bell Atlantic, Choice Pus, Coventry Health Pan, FlexCare, Mail Handlers Benetit Pan - MHBR, Mamiett, Preterred Dental Organization (PDC), Prudential Administered by Aetra, Southwestern Bel Exec - Custom Care, TWR, Varian Health Care Plan	Ľ	Û
AFLAC	1 Two-Factor Auth Required	Dec 14, 2023, 6:27 AM	AFLAC New York, AFLAC	Ľ	0
	\checkmark				

5. Once you receive the required authentication code, click **Two-Factor Auth Required**, enter the code, and then click **Verify**.

Dentrix completes the connection to the payer, and the **Payer Connection Portal** appears reporting your connection status with the payer websites.

NE Payer Connection Portal Hell-Davis ase provide the payers to configure credentials used for data retrieval								
Payer Connection #	Status ¢	Last Updated \$	Payer Group	Actions				
AFLAC	⊘ Connected	Jun 18, 2024, 3:07 PM	AFLAC, AFLAC New York	2 0				
Cigna	 Authentication Failed 	Jun 18, 2024, 3:06 PM	Cigna	2 ō				
Delta Dental Ins Co	Connected	Jun 13, 2024, 12:20 PM	AARP Dental Insurance Plan, Delta Dental Ins - Alabama, Delta Dental of California, Delta Dental of Delaware, Delta Dental Ins - Florida, Delta Dental Ins - Georgia, Delta Dental Ins - Delta Dental Ins - Louisiana, Delta Dental of Maryland, Delta Dental Ins - Mississiph, Delta Dental Ins - Montana, Delta Dental of New York, Delta Dental of New York, Delta Dental of Pensylvania, Delta Dental of New Chico, Delta Dental Ins - Texas, Delta Dental Ins - Utah, Delta Dental of West Virginia	2 0				
Delta Dental of Idaho	⊘ Connected	Jun 18, 2024, 3:08 PM	Delta Dental of Idaho	2 0				
Delta Dental of Illinois	· Authenticatid	Jun 19, 2024, 1:07 PM	Delta Dental of Illinois	<u>/</u> Ō				
Delta Dental of Oregon	O Connected	Jun 18, 2024, 3:11 PM	Delta Dental of Oregon	2 0				
Delta Dental of Virginia	O Connected	Jun 18, 2024, 3:19 PM	Delta Dental of Virginia	<i>i</i> n				

6. If an authentication fails, click the Edit icon to the right of the payer list and check the credentials you entered in the Edit Payer Credentials dialog box.

VERIFYING ELIGIBILITY AND VIEWING ELIGIBILITY STATUS

When eligibility responses are returned, an eligibility indicator appears automatically in the Appointment Book and the Family File based on status. Eligibility indicators are color-coded as follows:

- A green E = Eligible
- A red E = Not Eligible
- An orange E = Error
- A yellow E = Eligibility Not Checked

Eligibility verification occurs automatically based on upcoming appointments:

- Eligibility requests run in batches every three hours for all appointments scheduled within the next seven days of the current month.
- Same-day appointments made within the current seven-day period are checked immediately without having to wait for the next batch of requests to run.
- Eligibility requests for appointments scheduled for the first six days of the following calendar month are held and checked on the first day of the new month. This ensures that you receive the most accurate results.

To verify eligibility and view eligibility status

 In the Appointment Book or the Family File, hover your pointer over the desired eligibility indicator. A text box appears with details applicable to the request.

Mr. Jones, Steve LimitedEx H: (801) 1586 Blue Cross Blue Shield DTD1 General	Request Patient Eligibility Status: Eligible Expiration Data: 02/19/2024 MetDife	NP-Gutierrez CompEx H: (509)0997 Blue Cross Blue Shield DDS1 General	quest Patient Bigbility atus: Not Eigible te: 02/19/2024 et.ife
	Mrs. Abbott, Sara PerioExam H: (801)	Request Patient Eligibility Status: Invalid Subscriber/Insured Name Expiration Date: 02/21/2024 MetLife Description: Verify that the subscriber's/insured name is correct in your practice management system. Resubmit your eligibility request if there are any changes.	

2. To request an on-demand eligibility check, click the desired eligibility indicator.

A menu appears.



- 3. Click one of the following options:
 - Request Basic Eligibility (EDI)
 - Request Enhanced Eligibility

Note: If your office is subscribed to Eligibility Essentials, and you select Request Enhanced Eligibility, the following message appears:

Enhanced eligibility requests are transaction fee. Are you sure you	subject to a \$2 per want to continue?
Do not show this warning fo	or 30 days

VIEWING ELIGIBILITY RESPONSES IN THE DOCUMENT CENTER

When eligibility responses are returned, they are automatically saved to the Document Center as PDF files.

To view an eligibility response

- 1. In the Appointment Book or the Family File, click the desired eligibility indicator.
 - A menu appears.



2. To view the eligibility detail in a PDF document, click View Eligibility Detail (PDF).

The PDF document for the selected request opens detailing the patient's eligibility information.

S Dentrix Document Center -											-		×
Eile Edit View Acquire Setup Help													
1 🕱 📾 🕼 💺 🧠 🧶 🗆 🖂 📼 🕞 🗟 🗘 R. 🖉	18		.										
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🗏 🗄 🎝 🆓 🏂 🖇 🔝 🍰 🍰 .													
Le Ligibility Ligibility Ligibility Ligibility	¢									Created: June 18, 202	M at 4:19 F	M	I
	0		Eligible						Trans	vaction ID:			
											Source: E	DI	
	Q												
			Patient		Deductibles	and Ma	kimums						
			First Name	Last Name	Deductible		Category	IN NETWORK		OUT OF NETWORK			
					Individual								
			Date of Birth		Annual Amo	ount	Dental Care	\$25		\$65			
					Annual Rem	naining	Dental Care	\$25		\$85			
			Subscriber		Family								
			First Name	Last Name	Annual Amo	sunt	Dental Care	5/0		\$185			
							Denai Gare	3/5		4100			
		4			Maximum		Category	IN NETWORK		OUT OF NETWORK			4
			Subscriber ID	Date of Birth	Individual								
					Annual Amo	ount	Dental Care	\$2,500		\$1,500			
			Group Name	Group #	Annual Rem	naining	Dental Care	\$2,500		\$1,500			
						1000000							
			Provider		Frequency,	History,	Limitations						
			Name		Service Type	Descriptio	in .	Frequency Restriction	History	Limitatio	ns		
					Diagnostic								
			NPI		D0120	Routine d overall or any neces	ental exam to examine al health and check for ssary treatment needed	None	None	None			
			Plan		D0140	Problem f for a spec	locused dental exam tific issue	None	None	None			
			Plan Name	Insurance Type	D0145	Dental ex years old	am for a child under 3	None	None	None			
			Dental PPO	PPO	D0150	A thoroug the patien	h oral examination of t's dental history.	None	None	None			

Viewing Changes from Patient Forms in Health History

If your patients make changes online to their medical conditions, allergies, medications, or contacts in Patient Forms, those changes are now reflected in Health History. These changes are marked by a purple badge to the right of the section header and a purple dot next to the updated item.

Note: The purple badges and dots signifying that changes were made appear for 10 days after a form was updated or until the patient's next appointment is set complete.

To view changes made in Patient Forms in Health History

1. In any module except the Office Journal and eDex, click File, point to Switch To, and then click Health History.

The Health History window and any changes made online in Patient Forms appear.

deal Conditions Comprised at	D DELOFIN								
edical Conditions CONDITIONS TO	Statue V	Reported Date V	Inactivated Date V	Pop-up ~	Critical	Note V	•		m
Type II Dishetes	Active	A/10/2024	mocuvated Date	Vec	cintical	P			4.00
Cancer	Active	4/10/2024		Ves	Ves	;		Shirley H. Crosb	у
Heart Disease	Active	4/1/2024		Vas	ies	;	-	Birthday: 11/6/1984	
Macular Digeneration	Active	4/1/2024		Ves		;		Home Phone: (801)797-5969	
Gum Disease	Active	4/1/2024		Yes		3		Mobile Phone:	
Covid 19	Active	4/1/2024		Yes		1	~		
	Pictific	47172024		103		•			
IGIES ALLERGIES TO REVIEW	6 1-1-1-1				a black of			Health History Note	
scription ~	Status V	Reported Date ~	Inactivated Date V	Pop-up ~	Critical ~	Note ~	^		Edit Note
flouride	Active	4/10/2024		Yes	•	1	_		
Peanuts	Active	4/10/2024		Yes					
Poultry	Active	4/1/2024		Yes		1			
emonade	Active	4/1/2024		Yes	•	1			
Aspirin	Active	4/1/2024		Yes		3			
Aspirin	Active	4/10/2024		Yes	-	4		Emergency Contact: Name:	O d
Aspirin Zoloft Sylenol Advil Methadone Insulin	Active Active Active Active Active Active	4/10/2024 4/1/2024 4/1/2024 4/1/2024 4/1/2024 4/1/2024		Yes Yes Yes Yes Yes Yes		2	_		04
Aspirin Zoloft Tylenol Advil Insulin escriptions escription	Active Active Active Active Active	4/10/2024 4/1/2024 4/1/2024 4/1/2024 4/1/2024 4/1/2024	Provider P	Yes Yes Yes Yes Yes Yes	- - - - NS	eRx	•	• Energency Cortact: Name: Phone: Physician Contact: Name: Specially: Phone: Prefered Pharmacy: Name: Fax: Phone: Location: Location:	04
Aspirin Zoloft Tyfenol Advil Methadone Insulin Insulin Insurptions	Active Active Active Active Active Active	4/10/2024 4/1/2024 4/1/2024 4/1/2024 4/1/2024 4/1/2024 4/1/2024	Provider P	Yes Yes Yes Yes Yes Yes	- - - - -	eRx	•	• Energency Cortact: Name: Phone: Physican Contact: Name: Specially: Phone: Prefered Phamacy: Name: Fax: Phone: Location: Health History Questionnaire Forms	0 4 0 4 0 4

Contacting Customer Support Using Dentrix Chat

If you have an active Customer Service Plan, and as an alternative to placing a call to Dentrix Customer Support, you can use Dentrix Chat to begin a chat session with a Customer Support Representative. Dentrix Chat is available from inside Dentrix or through the Dentrix website.

To contact Customer Support using Dentrix Chat

- 1. Do one of the following:
 - From any Dentrix module, click the Dentrix Chat icon 🥴 ۰



Open your browser to the Dentrix website, navigate to the Contact Support page, and then click • the Click to Chat icon or the Contact icon in the lower-right corner of the webpage.

The **Dentrix Chat** dialog box appears.



Type the name you want to be referred to by, and then click Begin Conversation.
 Once the Customer Support Representative verifies your account, type your question or issue.

Performing Searches Using the Select Patient Dialog Box

The **Select Patient** dialog box was modified to open faster. The Social Security number and Chart number search options were removed from the Search By and Advanced Search tabs. Also, these options no longer appear as columns in the list of patients.

To perform a search using the Search By tab

1. In any Dentrix module that requires you to select a patient, click the File menu, and then click Select Patient.

The Select Patient dialog box appears.

anby	Appointments Adva	anced Search		Show	On Screen Keyboard	2		
					(
	 Last Name (Last, 	, Firstj 🔾) Preferred	IName				
	 First Name (First, 	Last) 🤇) Phone					
	Enter Last Name (La	ist, First):						
	smith			Search				
	Include Archived	Patients						
HoH	Last Name /	First Name	MI	Preferred Name	Phone	Birthday	Status	
ж	Smiley	Jammie			(775)555-1812 [M]	7/2/1961	Patient	
×	Smith	Michael				6/30/1974	Patient	
×	Smith	Nicole	G		(406)555-0001 [M]	1/20/1970	Patient	
×	Smith	Olivia			(702)555-0001 [M]	9/4/1976	Patient	
м	Smith	Lucas			(775)555-5010 [M]	6/10/1988	Patient	
н	Smith	Mary	м		(305)555-2466 [M]	10/20/1968	Patient	
ы	Smith	Mason			(775)555-5030 [W]	1/18/1988	Patient	
ж	Smothers	Jaden			(702)555-4756 [M]	6/6/1990	Patient	
×	Sneed	Alyssa			(725)555-2027 [M]	6/4/1972	Patient	
н	Snell	Zane			(775)555-6633 [M]	3/6/1988	Patient	
м	Snell	Terry			(702)555-1624 [M]	4/12/1947	Patient	
н	Snider	Tanya			(725)555-1088 [M]	8/7/1989	Patient	
ы	Snook	Esme			(725)555-4925 [M]	6/7/1965	Patient	
*	Snow	Alexia			(725)555-0734 [M]	10/1/1958	Patient	
×	Snyder	Theo			(725)555-5174 [M]	2/1/1933	Patient	
8	Snyder	Lorraine	Т		(305)555-4849 [M]	11/30/1994	Patient	
м	Snyder	Callie			(775)555-0165 [M]	5/11/2001	Patient	
riously S	elected Patients							
HoH	Last Name	First Name	М	Preferred Name	Phone	Birthday	Status	

- 2. Select one of the following options:
 - Last Name Search by the patients last name.
 - First Name Search by the patient's first name.
 - **Preferred Name** Search by the patient's preferred name.
 - **Phone** Search by the patient's phone number.
- 3. Type the patient's name or number in the Search box.

As you type, possible matches appear in the table below.

To perform an advanced search

1. Click the Advanced Search tab.

The Advanced Search options appear.

La Fir: referre	st Name: smith st Name:	E						
Fin	st Name:		lithdar	1.1		•		
Fir eferre	st Name:		no ody	· _ · _				
eferre			Phone:					
	ed Name:		(Mo	ibile, Work, Uther, Fax				
	Status: 🔽 Patient							
	Inactive	ent						
	Archived	(Search	Clear				
нан	Last Name /	Eirst Name	м	Preferred Name	Phone	Bithdau	Statue	
×	Smith	Lucas	IMI	Freiened Name	(775)555-5010 (M)	6/10/1988	Patient	
×	Smith	Nicole	6		(406)555-0001 [M]	1/20/1970	Patient	
×	Smith	Maru	M		(305)555-2466 [M]	10/20/1968	Patient	
×	Smith	Michael	1-1		(000)000 2 100 [.1]	6/30/1974	Patient	
м	Smith	Olivia			(202)555-0001 (M1	9/4/1976	Patient	
н	Smith	Mason			(775)555-5030 Jw/1	1/18/1988	Patient	
	Shindi	mason			(110)000-0000 [44]	1710/1000	1 GUOIR	
iouslu	Selected Patients							
loasiy	Colocied Faderics							
HoH	Last Name	First Name	MI	Preferred Name	Phone	Birthday	Status	

2. Type the first few letters or numbers of the patient's name, birthdate, or phone number in the corresponding text boxes.

As you type, the possible matches appear in the table below.

Dentrix 24.11

Overview and New Features

This Dentrix 24.11 Release Guide provides information about the Dentrix 24.11 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.11.

Note: For information about using the new features in Dentrix 24.11, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.11?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.11 includes the following enhancements:

BUG FIXES

- Resolved an aging display issue for accounts with specific circumstances of having a zero balance and insurance claims in history.
- Corrected a discrepancy in rounding between locations where the Scheduled Production Amounts were displayed in the Appointment Book.
- When the office does not have Dentrix Pay, the **Send Payment Request by Text** option will no longer be available for selection.
- When you use the **Write to File** option in the Audit Trail Report settings, the Print Preview will now automatically close after generating the file.
- Added an additional fail-safe check during installs and upgrades to run logic that verifies the database version.
- Resolved an error where selecting the **Available Diagnostic Codes** menu option would cause the Office Manager to shut down unexpectedly.
- Modified the order of installation operations so that a serial number is recorded before the Dentrix Client Service restarts.
- Corrected an error found under specific circumstances where merged family balances were displayed incorrectly.
- Corrected a specific set of circumstances where the Last Payment Date and Last Payment Amount information were incorrectly cleared after running the Close Transactions month end task.

Dentrix 24.10

Overview and New Features

This Dentrix 24.10 Release Guide provides information about the Dentrix 24.10 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.10.

Note: For information about using the new features in Dentrix 24.10, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.10?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.10 includes the following enhancements:

MISCELLANEOUS

- The **Practice Definitions** dialog box was modified from displaying seven rows of definition types to displaying 18 rows. For more information, please refer to "<u>Customizing practice definitions</u>" in the Dentrix Help.
- The Insurance Information dialog box was modified so that when you click the Subscriber additional information icon, the selected subscriber in the Subscriber list is selected by default in the Select Primary Subscriber (Insured Party) dialog box.
- The Insurance Information dialog box was modified so that you cannot change the selected insurance carrier by typing a name in the Carrier field. You must select a new carrier from the Select Primary Dental Insurance Plan or Select Secondary Dental Insurance Plan dialog boxes.
- The Insurance Information dialog box was modified so that when you select the New Insurance Plan option in the Subscriber list, the Subscriber ID # field is cleared. For more information, please refer to "Assigning insurance to subscribers" in the Dentrix Help.
Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Viewing Definition Types

Practice definitions are user-definable entries that allow you to customize Dentrix for the needs of your practice. Practice definitions include billing types, adjustment types, payment types, appointment types, alert notes, and so on. The **Practice Definitions** dialog box was modified from displaying seven rows of definition types to displaying 18 rows.

To view definition types

1. In the Office Manager, click Maintenance, point to Practice Setup, and then click Definitions.

The **Practice Definitions** dialog box appears.

Practice Definitions		×
Definition Type	_	
Adjustment Types	-	
ID Definition Text		
1 - Family/Friend Courtesy		Add
1: -Family/Friend Courtesy 2: -Full-Payment Courtesy	^	Change
3: -Professional Courtesy 4: -Seniar Diriter Courtesy		Delete
5: -Staff Courtesy		
7: +Sales Tax		
8: +Charge Adjustment 9: -Credit Adjustment		
10: +Electronic Check Credit 11: +Online Credit Card Credit		
12: +NSF Check		
13: +NSF Bank Fee 14: -In-office Write-off		
15: -Write-Off 16: -Bankruntcy Write-off		
17: +Collected - Bad Debt		
j to: +ratient herung	Ŧ	Close

Viewing the Changes to the Insurance Information Dialog Box

The Insurance Information dialog box was modified in the following ways:

- When you click the **Subscriber** additional information icon, the selected subscriber in the **Subscriber** list is selected by default in the **Select Primary Subscriber (Insured Party)** dialog box.
- You can no longer change the selected insurance carrier by typing a name in the **Carrier** field. You must select a new carrier from the **Select Primary Dental Insurance Plan** or **Select Secondary Dental Insurance Plan** dialog boxes.
- When you select the **New Insurance Plan** option in the **Subscriber** list, the **Subscriber ID #** field is cleared.

THE SUBSCRIBER ADDITIONAL INFORMATION ICON

1. In the Family File, double-click the Insurance Information block.

🗊 Dentrix Family File - Davis,	Karen [DA0003]					—	×
File Edit Help							Dennis S
🕅 📓 🔌 💺 🖽 🖣	🕅 🔏 🗖 🖅 🗔 🞯 🖺 🖳 💦	🦉 🗐 🕻	0	ê2 2	🗧 🌆 🛓		\$ i
Name	: Ms. Davis, Karen		017	Chart #: D	A0003		
Address	Cisco III 84515 Eirs	nsent: 03/06/2 t Visit: 03/06/2	017 017	55#:U	00-00-0007		
	Las	t Visit: 04/24/2	024 E	Birthday: 0	1/15/1984, 40		
Phone	Missec	 Appt : 10/04/2	022, 3 F	Provider: D	DS1		
Statue	M (801)555-1781 : Active E Single Guer Ins H-of-H	-Mail-	Fee	Sched: <	Prov Default>		
Health	Employer	Cont	10/19/	22 PROPI	IY		
History	Noble Finance	Care	04/25/2	5 BITEWIN	GS		
Primary De	ental Insurance	Patient Note	\$			View	
Compa	ny: Equicor Cigna						
Group Pl	an: Noble						
Fee Sch	ed: Eligible:						
Covera	ge: 3500.00 Used: 620.00						
Ded. S/P	/U: 25/0/0 Met: 0/0/0 🔍 🔝						
		Referred Ru					
2624.74	31>60 61>90 91> Balance	Mr	Little, Dear	(Patient) 03	3/06/2017		
Monthly F	Payment: 50.00 Amt Past Due: 338.87	Referred To					
Bill Type	: 1 Last Payment: 50.00 02/09/2021						
Statu	Name	Position	Gender	Patient	Birthday		
HofH Gua	r Ins Davis, Karen Davis Mark	Single Child	Female Male	Yes Yes	07/10/2005	^	
	Davis, Kelly	Child	Female	Yes	01/30/2007		
II	ns Davis, Harmon	Other	Male	No	12/05/1977		
						~	

The Insurance Information dialog box appears.

Insurance Information	×
Dental Insurance Medical Insurance	
Primary Insurance	Secondary Insurance
Subscriber:	Subscriber:
Davis, Karen 🗨 🛃	- 3
Carrier:	Carrier:
Equicor Cigna >>	>>>
Subscriber ID #: 000-00-0007	Subscriber ID #:
Signature on File	Signature on File
Release of Information	Release of Information
Assignment of Benefits	Assignment of Benefits
Relation to Subscriber	Relation to Subscriber
Image: Self ⊂ Spouse ⊂ Child ⊂ Other	C Self C Spouse C Child C Other
Insurance Data Benefits/Coverage	Insurance Data Benefits/Coverage
Clear Primary	Clear Secondary
Insurance Claim Information	OK Cancel

2. Click the Subscriber additional information icon.

The **Select Primary Subscriber (Insured Party)** dialog box appears with the subscriber's name selected.

Select Primary Subscriber (Insured Party)					×
Subscriber Name	Subscriber ID	Carrier Name	Employer Name	Group Plan Name	Group #	
Davis, Karen	000-00-0007	Equicor Cigna	Noble Finance	Noble	18550	
Davis, Harmon		Principal Financial Group	Solutions Group	Solutions Group	88446	
<						>
				OK	Cance	1

SELECTING A NEW CARRIER

1. To select a new primary carrier, in the **Insurance Information** dialog box, click the **Carrier** search button.

The Select Primary Dental Insurance Plan dialog box appears.

Select Primary Dental Insurance	Plan				×
Enter Carrier Name: Equicor Cigna		Search By Carrier Name C Group Plan C Employer C Group Number	C Local Num C Address	ber C Payor ID	
Carrier Name	Group Plan	Employer Name	Group #	Local # Payor ID	Address 🔺
Blue Cross Blue Shield Blue Cross Blue Shield Connecticut General Connecticut General Delta Dental Plan Delta Dental Plan Delta Dental Plan Dental Select Equicor Cigna	Allied Allied AT&T Columbia Columbia Diamond Diamond Diamond Pacific States Noble	Allied - Southwest Allied Architects Inc. AT&T Columbia Industries Columbia Healthcare Diamondback Management Diamond Welding Diamond Offshore Drilling Pacific States Noble Finance	21774 21009 21440 55001 65001 22331 12121 11009 95740 18550	84101 84101 62308 62308 77777 77777 77777 DSL01 62308	CD, Colorado S CD, Colorado S CD, Colorado S CA, Visalia CA, Visalia CA, San Franci CA, San Franci CA, San Franci UT, Salt Lake I IA, Des Moines
Kew				OK	Cancel

- 2. Do one of the following, and then click OK:
 - Under Enter Carrier Name, type the first few letters of the carrier's name. From the list, click the name of the carrier most closely resembling the name you type.

Note: The list may contain several plans associated with a single carrier, be sure to select the patient's specific plan.

• Navigate the list using the scroll bar, and then click the desired carrier.

SUBSCRIBER ID

1. To select a new insurance plan, in the **Insurance Information** dialog box, click the **Subscriber** down arrow, and then click *Subcriber Name*/**New Insurance Plan**.

Insurance Information	×
Dental Insurance Medical Insurance	
Primary Insurance	Secondary Insurance
Subscriber:	Subscriber:
Davis, Karen 🗾 🗾	<u>▼</u> .⊟
Davis, Karen / Equicor Cigna / 000-00-0007 Davis, Karen / Equicor Cigna / 000-00-0007 Davis, Harmon / Principal Financial Group /	
Assign dependent coverage outside family	
 Release of Information Assignment of Benefits 	 Release of Information Assignment of Benefits
Relation to Subscriber	Relation to Subscriber O Self O Spouse O Child O Other
Insurance Data Benefits/Coverage	Insurance Data Benefits/Coverage
Clear Primary	Clear Secondary
Insurance Claim Information	OK Cancel

The subscriber's previous plan and **Subcriber ID #** are cleared from the **Insurance Information** dialog box.

Insurance Information	×
Dental Insurance Medical Insurance	
Primary Insurance	Secondary Insurance
Subscriber:	Subscriber:
Davis, Karen 🗾 🗾	<u>-</u> ₽
Carrier:	Carrier:
<u> </u>	<u>}>></u>
Subscriber ID #:	Subscriber ID #:
Signature on File	Signature on File
Helease of Information	Release of Information
Relation to Subscriber	Relation to Subscriber
Insurance Data Benefits/Coverage	Insurance Data Benefits/Coverage
Clear Primary	Clear Secondary
Insurance Claim Information	OK Cancel

2. Select a new carrier for the selected patient.

The new carrier's name and subscriber ID appear in the **Insurance Information** dialog box.

Dentrix 24.9

Overview and New Features

This Dentrix 24.9 Release Guide provides information about the Dentrix 24.9 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.9.

Note: For information about using the new features in Dentrix 24.9, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.9?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.9 includes the following enhancements:

MISCELLANEOUS

- If you have enabled passwords, you can now choose how you want to display the logged in user's name in the menu bar. First name and last initial is the default setting. Other options include: full name, initials only, or user ID.
- The wording of the notification that was added to the **Practice Setup** menu in Dentrix 24.8 was changed to read: Changes may not reflect until reopening Dentrix.
- In the Appointment Book, two dialog boxes that were used to set up or edit views had the same name (Select View). To avoid confusion, the name of one of the dialog boxes was changed to **Setup View**. Please refer to "Setting up views" in the Dentrix Help.
- Dentrix Imaging Center now features image stacking—a collection of images grouped together by tooth number in the same exam. For more information, please refer to "Navigating image stacks" in the Dentrix Help.
- Dentrix Detect AI now includes FDA approved detections of the following:

For more information, please refer to "Viewing additional Dentrix Detect AI indications" in the Dentrix Help.

- Caries on all primary and secondary teeth of patients three years and older.
- Periodontal radiolucency (PRL) for patients 22 years and older to more effectively identify bone demineralization due to infections around root apices, cysts, and other causes. PRL is indicated by a red circle or oval.
- Interproximal calculus to educate your patients 12 years and older on the importance of scaling and root planing. Combined with measuring interproximal radiographic bone levels, Dentrix Detect AI illustrates disease prognosis for the patient and clinician. Interproximal calculus is indicated by an orange circle or oval.
- Restoration imperfections in patients 22 years and older, such as identifying imperfect crown and filling margins and voids. A restoration imperfection is indicated by a yellow rectangle.
- QuickBill Premium Website Payments is now available, which allows your patients to make payments through your practice's website. For more information, please refer to "Enabling QuickBill Premium Website Payments" in the Dentrix Help.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Setting Username Preferences in the Menu Bar

If you have enabled passwords, the logged in user's name appears in an open module's menu bar. You can choose how you want to display the user's name.

To set username preferences in the menu bar

- 1. In any open Dentrix module, click the logged in user's name. point to **User Display Preference**, and then click one of the following options:
 - First Name and Last Initial
 - Full Name
 - Initials Only
 - User ID



Viewing New Dentrix Detect Al Indications

Dentrix Detect AI helps you with the following FDA approved features:

- Measuring interproximal Radiographic Bone Levels in bitewings and Periapical Radiographs (PAs) for patients who are at least 12 years old. Bone level detection is only possible with mesial and distal surfaces. RBL measurements appear as green, yellow, orange, or red dotted lines.
- Detecting caries on all primary and secondary teeth of patients three years and older.
- Detecting periodontal radiolucency (PRL) for patients 22 years and older to more effectively identify bone demineralization due to infections around root apices, cysts, and other causes. PRL is indicated by a red circle or oval.
- Detecting interproximal calculus to educate your patients 12 years and older on the importance of scaling and root planing. Combined with measuring interproximal radiographic bone levels, Dentrix Detect AI illustrates disease prognosis for the patient and clinician. Interproximal calculus is indicated by an orange circle or oval.

- 4 Dentrix 24.9
 - Detecting restoration imperfections in patients 22 years and older by identifying imperfect crown and filling margins and voids. A restoration imperfection is indicated by a yellow rectangle.

To view the new Dentrix Detect AI indications

1. In the Patient Chart, click the Launch Dentrix Imaging toolbar button.

The Dentrix Imaging Center window appears.

2. Click the Acquire Images tab.

O Dentrix Imaging Center					
			Karen Davis 1/15/1984		
Show Most Recent Images Sho	ow Image History	Acquire Images			
Imaging Procedures		* Acquisition O	ptions for Bitewing Four Images		
Favorites Standard Custo	m	Acquisition sequence Default sequence	Default sequence Undo		
Intraoral Full Mouth Images	D0210	1. BW #3, 2, 1, 30, 31, 3	32 Reset		
Intraoral Periapical Image	D0220	2. BW #5, 4, 3, 28, 29, 3 3. BW #12, 13, 14, 21, 2	30 20,19 1 2 3 4		
Intraoral Occlusal Image	D0240	4. BW #14, 15, 16, 19, 1	18, 17		
Extraoral Posterior Image	D0251	U/thout intermentati	ion/anshurir uring and PA200		
Bitewing Single Image	D0270	- without interpretation	onvenerysa using code corvo		
Bitewing Two Images	D0272	Task to Perform			
Bitewing Four Images	D0274	Acquire Images	Import Images		
Bitewing Seven Images	D0277	Acquisition method for	this imaging exam		
		Simulation			
		Proceed with Acquisi	doon Cancel Copyright 6 2013 - 2022 Henry Solven One J All Rights Reserved		

- 3. Under Imaging Procedures, click the Standard tab, and then select the imaging procedure you want to perform.
- 4. Click Proceed with Acquisition.

Dentrix Imaging Center acquires the selected images, submits them to VideaHealth, and displays them in **Show Image History** automatically.

RBL and Calculus



Caries, RBL, PRL, and Restoration Imperfections



Navigating Image Stacks

An "image stack" refers to a collection of images that are grouped together by tooth number in the same exam. This grouping facilitates a layered display within the imaging software, allowing users to navigate through the images by interacting with UI controls. The arrangement of the stack ensures that the most recently captured image is typically displayed at the top, but you can easily access earlier images by using the arrow buttons to navigate through the images. This allows you to closely compare subtle changes and details within the same area across different images taken in the same exam.

To navigate an image stack

1. Click the Previous or Next buttons (to the right of the image count) to navigate the images.

The number of images in the stack appear in the upper-right corner of the image.



Enabling QuickBill Premium Website Payments

The QuickBill Premium Website Payments feature allows your patients to make payments through your website. To enable QuickBill Premium Website Payments, you must subscribe to QuickBill Premium and establish a Worldpay Merchant ID.

To enable QuickBill Premium Website Payments

 Contact your web designer to add a payment button to your website that is linked to the following URL: https://www.paymydentist.net/patientpay/[Customer ID]?dataservicesid=[eTrans ID]. For example, if your Customer ID was 67882 and your eTrans ID was 67894, the URL would be https:// www.paymydentist.net/patientpay/67882?dataservicesid=67894.

Important: The Customer ID and eTrans ID identify your specific practice. See steps 2 and 3 for instructions on where to find these IDs.

2. To find your Customer ID, in any Dentrix module, click Help, and then click About Dentrix.

The About Dentrix dialog box appears. Your Customer ID appears to the left of your Serial Number.

3. To find your eTrans ID, in the Office Manager, click **Maintenance**, point to **Practice Setup**, and then click **Electronic Claims Setup**.

The **eTrans Setup** dialog box appears, and the eTrans ID appears in the **User ID** box.

🙁 eTrans 6.1 Setup		×
User ID: 67894	Change Password	3
— File Transfer —		
Connection Method		
Internet 💌	Test Connection	
Dial-up Settings		
- Post Submission		
🔽 If no claims need attention, do not	display Error Report	
Show Advanced >>	OK Cancel Ap	ply

When a patient clicks the payment button on your website, a screen similar to the following appears.

Richard Sour	th Main St NH
(603)	
Enter the patient's inform payment is applied to the	nation below to ensure this e proper account.
Last Name	Last Name
Date of Birth	MM/DD/YYYY
Cardholder Details	
Zip Code	00000
Phone Number	(000) 000-0000
Payment Amount	\$0.00
Make	Payment
(R) Product o	f QuickBill Premium

4. Click Make Payment.

QuickBill Premium performs a series of validation checks, and the following screen appears.

Pi	chard		
	chara	Main C	+
		Main 5	
		NH	
(603)		
You are now in	secure lo transa	cation to co ction.	omplete your
Patient Last I	Name		
Payment Am	nount	\$5	50.00
Zip Code	e	1	ווווו
Card Information		* Denotes	a required field
* Card Number:			0
Expiration: Mo	onth 🖌 🛛 Y	ear 🗸	
* CVV:	0		
Transaction Infor	mation		
Amount: \$50.00			
Make Payment	Cancel 1	Transaction	
	Can	7 <mark>1</mark>	
	(R) Product of Qu	ickBill Premium	

5. To complete the transaction, the patient enters the required information, and then clicks Make Payment.

At your practice, the Online Payment Notification screen appears when a website payment is made.

_	Online Payment Notification	*
\$	You have received (4) Online	Payments
	Review and Import Payments	📕 Do Not Show This Again Today

6. Click Review and Import Payments.

The Import Online Payments dialog box appears.

Import Online Payme	Import Online Payments										
💲 ዥ 🛃 🗳	ł.			Search		Patient Information:					
Name	Card Type	Amount	Source	Status	Dat	Patient Name: Crosby, Brent L					
Mr. Brent L Crosby	Visa	\$2,070.00	QuickBill	Not Imported	03/2	P.O. Box 110					
Allen Perkins	Visa	\$250.00	QuickBill	Not Imported	03/2	Eastside, NV 11111					
Mary Brown	AMEX	\$840.00	QuickBill	Imported	03/2	Phone: (555)111-1111					
						E-Mail: brentlcrosby@dentrix.com					
						Cardholder Information:					
						Cardholder: Mr. Brent L Crosby Amount: \$2,070.00 Date: 3/26/2022 6:11 PM Card Type: Visa Card Number: **********1111 Source: QuickBill					
<					≥						
			Post Selected	Remove Sele	ected	Close					

7. To post an online payment to the corresponding account's Ledger, select it, and then click Post Selected.

Dentrix 24.8

Overview and New Features

This Dentrix 24.8 Release Guide provides information about the Dentrix 24.8 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.8.

Note: For information about using the new features in Dentrix 24.8, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.8?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.8 includes the following enhancements:

MISCELLANEOUS

- If you have enabled passwords, you can now log out of and close all open Dentrix modules at the same time instead of having to close each module separately.
- A notification was added to the **Practice Setup** menu warning that you may need to restart or refresh a Dentrix module before the changes you've made to settings appear.
- User permission templates were added to the **Setup User Permissions** dialog box to make setting up permissions faster and easier. In total, there are 5 templates:
 - Admin Template
 - Clinical Template
 - Doctor Template
 - Owner/Manager Template
 - Temp/Clinical Template
- The Select Patient dialog box has been updated so that it opens more quickly.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Logging Out of Dentrix and Closing All Open Modules

If you have enabled passwords, you can now log out of and close all of the Dentrix modules you have open at the same time instead of having to close each module separately.

To log out of Dentrix and close all open modules

1. In any open Dentrix module, click the logged in user's name, and then click Log Out & Close Dentrix.

🕼 Dentrix Ledger - Davis, Karen	[DA0003]	– 🗆 X
File Options View Transad		Dennis Smith
	🕱 Dentrix Office Manager - Dentrix Dental Practice	
🕅 🖾 🔊 🕱 🕅	File Reports Letters & Custom Lists Maintenance Analysis Help	Dennis Smith 🕺 📓 🕖 🗰
Date Name	Dentify Dentify Dentify Marco (DADDD)	
04/04/2023 Karen Davis	Dentrix Family File - Davis, Karen (DAU005)	
04/04/2023 Karen Davis	File Edit Help	Dennis Smith
04/04/2023 Karen Davis		Log Out & Close Dentrix
04/04/2023 Karen Davis	🕅 🔟 📡 🖽 👒 🌽 🗀 🖾 🖾 🖾 🖾 🦉 🔤 🖾 😨 🖉	
04/04/2023 Karen Davis	Name: Ms Davis Karen Chart #: DA0003	
05/01/2023 Karen Davis	Address: 1768 Northanger Consent: 03/06/2017 SS#: 000-00-0007	
05/01/2023 Karen Davis	Cisco, UT 84515 First Visit: 03/06/2017 DL#:	
06/15/2023 Karen Davis	Last Visit: 04/24/2024 Birthday: 01/15/1984, 40	
08/10/2023 Karen Davis	Missed App: 10/04/2022, 3 Provider: 0051 Missed App: 10/04/2022, 3 Provider: 0051	
08/14/2023 Karen Davis	Status: Active, F. Sinde, Guar, Ins. H-of-H E-Mail:	
08/30/2023 Karen Davis	HealthFmolover Cont 10/19/22 PROPHY	
08/30/2023 Karen Davis	History Noble Finance Care 04/25/25 BITEWINGS	
09/13/2023 Karen Davis	Primary Deptal Insurance Patient Notes Voice	
02/01/2024 Karen Davis		
02/01/2024 Karen Davis	Group Plan: Noble	
02/01/2024 Karen Davis	Group #: 18550	
03/01/2024 Karen Davis	Fee Sched: Eligible:	
04/01/2024 Karen Davis	Coverage: 350.00 Used: 520.00	
04/01/2024 Karen Davis	Diber Mary New (1500 00)	
04/24/2024 Karen Davis	Other Has. (1990-99) Pelanad Pr	
04/24/2024 Karen Davis	0-30 31-560 61-590 91-5 Balance Mt Little Dean (Patient) 03/06/2017	
04/24/2024 Karen Davis	2524/14 0.00 0.00 2524/14 Monthler Resmant: 50:00 And Past Due: 220.97 Referred To	
04/24/2024 Karen Davis	Bill Type: 1 Last Payment: 50.00 02/09/2021	
04/24/2024 Karen Davis	Statue Name Povition Gender Patient Birthdau	
04/24/2024 Karen Davis	Hoth Guar Ins Davis, Karen Single Female Yes 01/15/1984	
04/24/2024 Karen Davis	Davis, Mark Child Male Yes 07/10/2005	
04/24/2024 Karen Davis	Davis, Kelly Child Female Yes 01/30/2007	
04/24/2024 Karen Davis	ins Davis, namon Uther Male No 12/05/13/7	
04/24/2024 Karen Davis		
04/24/2024 Karen Davis		
04/24/2024 Karen Davis	· · · · · · · · · · · · · · · · · · ·	v
	04/21/2021 Adjustment Day Sheet Not Printed	
	04/21/2021 Deposit Stip Not Printed	
	04/21/2021 Daily Collections Not Printed	
	UNX 2012 UNX Street (UNX Stree	0.00
	Last Payment 50.00 Date 02/09/2021 Est. Patient Portion	0.00
	Last Ins. Payment Date 350.00 Date 04/12/2022 Payment Agreement Summar	ry
	Outstanding Billed to Medical/Dental 0.00/270.00 Monthly Pmt 50.00 Pmt Due	338.87
	Est. In-Network Adjustment *	04/2//2024
	Est. In-Network Allowed Amount * 50.00 Future Due Payment Plans Sum	imary
	Family Portion of Balance * 2564.74 Original Bal. 0.00 Payment	0.00
	* Based on Pending Claims and Today's Charges Remain Bal. 0.00 Due Date	
	r	

2. If unsaved work must be addressed before some Dentrix modules can be closed, Dentrix prompts you to take care of your unsaved work.

Note: The text of the notification dialog box will differ depending on what issue must be addressed.

Appointment Book									
One or more appointments scheduled for a day prior to today's date are on the Pinboard.									
Keep these scheduled appointments on the Pinboard.									
C Remove these scheduled appointments from the Pinboard (they will remain scheduled on the Appointment Book).									
OK Cancel									

3. If necessary, select the appropriate option, and then click **OK**. All open Dentrix modules close.

Practice Setup Menu Notification

A notification was added to the **Practice Setup** menu warning that you may need to restart or refresh a Dentrix module before the changes you've made to settings appear.

To view the Practice Setup menu notification

1. In the Office Manager, click Maintenance, and then point to Practice Setup.

The **Practice Setup** menu appears.

💺 Dentrix Office Manager - Dentrix Dental Practice	- 🗆 X
File Reports Letters & Custom Lists Maintenance Analysis Help	Dennis Smith
🔇 🕞 🖾 📭 🕲 🖉 Reference	· · · · · · · · · · · · · · · · · · ·
Practice Setup	Dentrix restart may be necessary to reflect changes
Task Scheduler(Month End)	Practice Resource Setup
	Procedure Code Setup
Audit Trail Report(Standard)	Dental Diagnostic Cross Code Setup ^
Audit Trail Report(Prov/Staff)	Medical Cross Coding Setup
Durge Exported Filer	Multi-Code Setup
Palge Exported Tries	Continuing Care
Delete Finance Charges	Passwords •
Delete Late Charges	Definitions
04/12/2021 Daily Collections 04/13/2021 Day Sheet (Chronol	Dunning Messages
04/13/2021 Day Sheet (Alphab	tical) Custom Notes
04/13/2021 Receipts Day Shee	Practice Defaults
04/13/2021 Deposit Slip	Fee Schedule Setup
04/13/2021 Daily Collections 04/14/2021 Day Sheet (Chrone)	Payment Agreement Template Setup
04/14/2021 Day Sheet (Chloho) 04/14/2021 Day Sheet (Alphabi	tical Dentrix Pay
04/14/2021 Receipts Day Shee	Request To Pay Setup
04/14/2021 Adjustment Day Sh 04/14/2021 Deposit Slip	Import Payment Settings
04/14/2021 Daily Collections	Electronic Claims Setup
04/15/2021 Day Sheet (Uhrono) 04/15/2021 Day Sheet (Alphah	Dgical) Electronic Billing Setup
04/15/2021 Receipts Day Shee	Auto Dial Settings
04/15/2021 Adjustment Day Sh 04/15/2021 Deposit Slip	Auto Chart Number Setup
04/15/2021 Daily Collections	Report Fonts Setup
04/20/2021 Day Sheet (Chronol 04/20/2021 Day Sheet (Alabab	ogical) Network Setup
04/20/2021 Receipts Day Shee	Server Administration Utility
04/20/2021 Adjustment Day Sh	Preferences
04/20/2021 Deposit Slip 04/20/2021 Daily Collections	Workstation Setup
04/21/2021 Day Sheet (Chronol	pgical) Not Printed
04/21/2021 Day Sheet (Alphabo 04/21/2021 Receipts Day Sheet	not Printed
04/21/2021 Adjustment Day Sh	Not Printed
04/21/2021 Deposit Slip 04/21/2021 Daily Collections	Not Printed
04/26/2021 Day Sheet (Chronol	ogical) Not Printed 🗸

Setting Up Permissions Using Templates

Role-based permissions templates were added to the **Setup User Permissions** dialog box to speed up and simplify setting up permissions.

To set permissions using a template

1. In the Office Manager, click Maintenance, point to Practice Setup > Passwords, and then click User Passwords Setup.

The Setup User Permissions dialog box appears.

2	Setup User Permissions X										
	DDS1	Smith, Dennis					0.				
								_Admin Tem	plate	iio 🛯 🖌	P
	Search Us	a pro	6	5				Admin Tem	plate polate		Ц
	Search be	3013			1			_Doctor Ten	plate		
	ID 🔺	Name	Title	Status	Admin	Pwd E	xpired	_Owner/Mar	nager Template		^
	DDS1	Smith, Dennis	D.D.S.	Primary	Yes			Administ	ration	select/Clear All 🔺	
	DDS2	Smith Junior, Dennis	D.D.S.	Primary				\checkmark	Administration	Password Administration	
	DDS3	Cook, Maria	D.D.S.	Primary		Ц			Administration	Procedure Log Report	
	DR99	DentrixDental, Pract	0.0.0	Primary				\checkmark	Administration	Utility Administration	
	ENDU HYG1	Evans, Enca	D.D.S.	Primary		님		Annointr	nents	Select/Clear All	
	MGR1	Taylor, Judy	Office M	Staff		H			Appointmente	Appointment Day Notes Medity	
	OFC1	Jones Susan	Front Desk	Staff					Appointments	Appointment Events Delete	
	ORTH	Oliverson, Oscar	THORE DOOR	Primary		H I			Appointments	Appointment Events, Delete	
	PEDO	Childs, Brenda	D.D.S.	Primary					Appointments	Appointment Events, Schedule New	
	PERI	Pearson, Paula	D.D.S.	Primary					Appointments	Appointment Views Add New	
	SURG	Sorensen, Steve		Primary					Appointments	Appointment Views, Delete	
									Appointments	Appointment Views, Edit	
									Appointments	Appointments, Break	
									Appointments	Appointments, Delete	
									Appointments	Appointments, Edit	
									Appointments	Appointments, Open	
								\checkmark	Appointments	Appointments, Open Lists	
									Appointments	Appointments, Purge	
								\checkmark	Appointments	Appointments, Schedule New	
									Appointments	Appointments, Set Complete	
								\checkmark	Appointments	Appointments, Setup Operatory	
									Appointments	Appointments, Setup Practice	
								\checkmark	Appointments	Appointments, Setup Providers	
									Appointments	Appointments, Setup Schedule	
								\checkmark	Appointments	Generate Appointment Book Views	
									Appointments	Generate Route Slips	
								\leq	Appointments	More Info / Family Appointment List	
									Appointments	Send Text	
								Billing an	d Collections	Select/Clear All	
								\checkmark	Billing and Collect	Billing Statement Notes Setup	
									Billing and Collect	Billing/Payment Agreement, Modify	
								\checkmark	Billing and Collect	Collections Manager, Open	
									Billing and Collect	Dunning Messages, Modify	
								\checkmark	Billing and Collect	Generate Aging/Patient Balance Reports	
									Billing and Collect	Generate Billing Statements	Υ.
										Save Close	

- 2. Select the user you want to grant permissions to.
- 3. Select the appropriate user permission template, and then click the Apply Permissions Template to User icon

The permissions associated with the template you selected are selected automatically.

4. Click Save.

6 Dentrix 24.8

Dentrix 24.7

Overview and New Features

This Dentrix 24.7 Release Guide provides information about the Dentrix 24.7 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.7.

Note: For information about using the new features in Dentrix 24.7, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.7?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.7 includes the following enhancements:

MISCELLANEOUS

In previous versions of Dentrix, you could only create a new patient file if you scheduled a new patient appointment, the patient kept the appointment, and you then set the appointment complete. You can now schedule a new patient appointment and create the new patient at the same time.

- When you create a new patient, a follow-up Continuing Care appointment is now scheduled automatically.
- The First Visit Date updates automatically when you set a new patient appointment complete.
- The Reports and Tasks Scheduler window now includes an automated task for archiving the broken appointment records of new patients.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Adding New Family Members to a Family

To make scheduling new patient appointments and gathering the relevant patient and insurance information easier, Henry Schein One has improved how you create new patients, add new family members to a family, schedule Continuing Care appointments, update First Visit dates, and archive new patient broken appointments.

To add a new family member to a family

1. In the Appointment Book, double-click an open schedule space.

The Select Patient dialog box appears.

Searc	h By Appoint	ments Advanced	Search	h									
					Show (On Screen Ke	evboard 🕥						
	● Last N	ame (Last, First)		O Home Phone									
	0.5			0.00)Chart #								
		lame (First, Last)		O Chart #									
	OPrefer	ed Name		⊖ss#									
				_									
	Enter Las	t Name (Last, Firs	t):										
	fr			Sear	rch								
							0001	D: 1	0.1				
оН	Last Name	First Name	<_ MI	Preferred Name	Phone	Chart #	SSN	Birthday	Status	Provide	4		
	Farrer	Lisa			(801)555-02	FA0001		10/28/1980	Patient	ENDO			
	Frazier	John				FR0002		11/15/1989	Patient	DDS1	I.		
ļ	Frazier	Mia				FR0003		10/9/1992	Patient	DDS1	ł		
ļ	Frazier	Michael			(004)555 05	FR0004		9/14/2009	Patient	DDS1			
_	Gleason	Alice			(801)555-85	GL0001	000-00-0008	8/10/1989	Patient	DDS1			
	Gleason	Gary	N		(801)555-85	GL0002	000-00-0009	9/15/1986	Patient	DDS1			
	Hansen	Corey	L		(801)555-17	HA0001	000-00-0010	10/17/1985	Patient	DDS1			
<u>.</u>	Hayes	Sally				HA0002		9/20/1992	Patient	DDS1			
	Jenkins	David		Dave		JE0001		10/15/1987	Patient	DDS1			
	Jenkins	Diane				JE0002		12/14/1989	Patient	DDS1			
	Johnson	Adria			(801)555-89	JO0002		5/4/2004	Patient	DDS1			
•	Johnson	Rachelle			(801)555-89	JO0001	000-00-0011	6/20/1980	Patient	DDS1			
1										>			
	augly Calastad I	Dationta											
ievi	Justy Selected I	duents											
юН	Last Name	First Name	M	Preferred Name	Phone	Chart #	SSN	Birthday	Status	Provide			
•	Davis	Karen	_			DA0003	000-00-0007	1/15/1984	Patient	DDS1	1		
	Fallon	Matt				EA0003		7/14/1986	Patient	DDS2			
	Brooks	James				BR0005		3/24/1988	Patient	DDS1			
÷	Looking	David		Dave		JE0001		10/15/1987	Patient	DDS1			
:		Davia		0070	(001) EEE 4E	00001	000 00 0004	7/15/10/01	Detirent	DDS1			
	Brown	Mary		Ms Brown	18011000-40	BRUUU		111011991	Patient				

2. Click Add Family Member.

The **Patient Information** dialog box appears.

Patient Information (Frazier Family)	×
Name Last* First*	MI Preferred Title Print Title on Stmts
Status Non-Patient V Male V S	Single
Birthdate* Age 55#	Other ID Chart Consent Chart Consent Statement Delivery Method KPractice Default> >>
1768 Vermont	Privacy Requests Privacy Requests No phone calls
Cisco UT 84515	
Phone Work Ext.	Time To Call Last Missed # Appt Missed Other
Referred By	>> Clear OK Cancel

- 3. Provide the following mandatory Information:
 - Under Name, type the patient's first name in the corresponding field.

Note: The default setting for the new family member's last name is the head-of-household's last name. If necessary, you can change the last name.

• Under **Personal** in the **Birthdate** field, type the patient's date of birth.

Notes:

- The new family member's status is set automatically to **Non-Patient**. When you set the appointment complete, the status updates automatically to **Patient**.
- The new family member's **First Visit** date is left blank. When you set the appointment complete, the **First Visit** date updates automatically.
- The new family member is automatically added to the head-of-household's family file.
- Under **Status**, the default settings are **Male** and **Single**. If necessary, you can change these settings.
- If you prefer not to require a new patient's birthdate, you can disable this requirement by clearing the option in the **Preferences** dialog box in the Office Manager.

eferences)
eferences - Payment/Adju Provider: Patient: Split Method: Do not a Payme	Print Options Statement Forms Paths Database Options ustment Options Instances of Treatment Planner: 4 To Guarantor's Primary Provider Instances of Treatment Planner: 4 Family Account Instances of Treatment Planner: 4 Guarantor Estimate Isuperior Beep on Entry Suspend Patient Alerts Suspend Treatment Area Flags Suspend Referral Print Reminders Hide Social Security Number ent Agreement Settings Image: Statement Settings Image: Statement Settings	
"It is recomme allocated to a Startup Optio Autor Sys Automat Default Signa Dental Insur Releas Releas Releas	ended that payments/adjustments be a specific patient and not the entire family. ns natic Updates Settings itically Launch Office Journal ature on File for New Subscribers se of Information ment of Benefits urance: se of Information	[
Assign	OK Cance	-

4. To close the Patient Information dialog box, click OK.

The Appointment Information dialog box appears.

Appointment Information - (Frazier, Michael) <new patient=""></new>	×
Provider: DDS1 > Continuing Care:	Created
Add'l Provider:	Last Changed
Initial	History
Add Tx Det. All	More Info (Dial)
Misc.	Patient Info
Appointment Description Appt Length	Other Appt(s)
0 min >	Ins Claim Info
Amount: 0.00 Status: Op: 0P-1 >	Schd. Next
Eligible: Schedule: FIXED Date: 04/11/2024 >	Wait/Will Call
Staff: > Type: <none> Ime: 3:00am ></none>	Find
Dentrix Pay Payment	Pinboard
Insert Dateline	🗌 Lab Case
^	Patient Lab Cases
	OK
	Cancel
×	
Confirmed Pre-Med 🔲 X-rays Requested 🔲 More Appts Schd 📃	Other Family Appts
Office Re-schd X-rays Received Update Health Hist Patient Re-schd Sent New Patient Pkg Update Ins Info	HIPAA Signed Review Finances

5. Under Reason, click Initial.

The Select Initial Reasons dialog box appears.



6. Select New Patient, and then click OK.

The following message appears.

Dentrix Continuing Care	×
One or more of the selected procedures is attached to a Continuing Care Type that was not set up for this patient. Set up Continuing Care for this patient using the default settings?	
Yes No	

7. Click Yes to set up continuing care for the patient using the default settings.

The Continuing Care procedures appear in the **Appointment Information** dialog box.

Appointment Information - (Frazier, Michael) <new< th=""><th>/ Patient></th><th>×</th></new<>	/ Patient>	×
Provider: DDS1 > Continuing PROPHY Care: FMX	04/11/2024 04/11/2024 >	Created
Reason Vise Re	ason to Auto Update CC	Last Changed
Initial Pc New Patient Appointment	Delete	History
Add Tx	Del. All	More Info (Dial)
Misc.	5	Patient Info
Appointment Description	Appt Length	Other Appt(s)
NewPat	90 min >	Ins Claim Info
Amount: 284.00 Status: <none></none>	0p: 0P-1 >	Schd. Next
Eligible: Schedule: FIXED	Date: 04/11/2024 >	Wait/Will Call
Staff: > Type: General 💌	1 ime: 9:00am >	Find
Netes	Dentrix Pay Payment	Pinboard
Notes	Insert Dateline	🗖 Lab Case
	~	Patient Lab Cases
		ОК
		Cancel
	~	
Confirmed Pre-Med X-rays Requested Office Re-schd X-rays Received Patient Re-schd Sent New Patient Pkg	More Appts Schd Update Health Hist Update Ins Info	Other Family Appts HIPAA Signed Review Finances

8. Click OK.

The appointment appears in the Appointment Book.

Managing New Patient Broken Appointments

A new option was added to the Appointment List window to help you manage broken appointments.

To manage new patient broken appointments

1. In the Appointment Book, click Appt List.

The Appointment List window appears.



- 2. In Select List, select Unscheduled New Patient.
- 3. To delete or archive one or more broken appointments, select them, and then click **Delete Patient(s)** or **Archive Patient(s)**.

🐻 Dentrix	Appointme	nt List								(-	- C X
File App	ointment	Status Setup	Help								Dennis S
1 🗟 📝	1	🧠 🗆 🗖	8 💷 🖪 🖪 R 🧳	7 🧸 🏒 🖭	0 55 DDX - 5	2210					
1 4 🖾	1	1 H SZ 1	Select Lis	t: Unschedule	d New Patient						
•	4/11/2024		Viewing: All			Search		م			
Date Date	Туре	A # Missed	Name	Prov	Reason	Mobile Phone	Phone	Work			
Broken											
4/11/20	24 Broken	1	Frazier, Cheryl	DDS1	NewPat						
4/11/20	24 Broken	1	Brooks, John	DDS1	NewPat			_			
									>		
<								>		14-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-	
									Set up auto management	Delete Patient(s)	Archive Patient(s)
								Production	for 2 Selected Appointm	ents: \$568.00 Total	Production: \$568.00

4. To set up a recurring task to archive broken appointments automatically, click **Set up auto** management.

The Reports and Tasks Scheduler window appears.



5. In the Available Tasks text box, search for and select Archive New Patient Records, and then click Add.

Dentrix 24.6

Overview and New Features

This Dentrix 24.6 Release Guide provides information about the Dentrix 24.6 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.6.

Note: For information about using the new features in Dentrix 24.6, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.6?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.6 includes the following enhancements:

MISCELLANEOUS

- The **Insurance Information** dialog box was improved so you can more easily assign insurance coverage to dependents outside of the family, and so you can assign insurance coverage from a dropdown list. Further improvements included:
 - Only the selected subscriber's name appears in the **Subscriber** field.
 - You can no longer select the same insurance plan for both your primary and secondary insurance.
- The List Manager window now includes an **Edit** menu from which you can change the status or fee schedule of a selected patient or several selected patients.
- You can now use a new workstation installation tool to set up your workstations.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Assigning Dependent Insurance Coverage Outside the Family

In the Family File, you can now more easily assign insurance coverage to dependents who are outside the family.

To assign dependent insurance coverage outside the family

1. In the Family File, select the dependent you want to assign insurance to from outside the family.

👼 Dentrix Family File - Smith, Michael [SM0001]					_	-		×
File Edit Help							Denni	s Smith
🕅 🔛 💺 🖪 🖏 🔏 🖅 🖅 🕼 🗑	🗟 R 🦪 📕	0	ê2 2	3			\$	
Address:	Consent: 03/0 First Visit: 03/0 Last Visit:	I/2024 I/2024	Chart #: S SS#: DL#: Birthday: 1	M0003 1/14/2014, 9				
Phone:	Missed Appt:		Provider: S	URG				
Status: Active, F, Child	E-Mail:	Fe	e Sched: <	Prov Default>				
Health History	Cont. Care							
Primary Dental Insurance View Med Company: Aetna Group Plan: Consumer Advocate Group Group #: 01278 Fee Sched: Eligible: Fee Sched: Eligible: E Coverage: 1500.00 Used: 0.00 Ded. S/P/0: 50/0/0 Met: 0/0/0 Other Max: Eligible: E	Patient No	Patient Notes [No Note]						
0>30 31>60 61>90 91> Balance 1029.52 0.00 0.00 0.00 1029.52	Referred I	y						
Payment Amt: NA Amt Past Due: NA Bill Type: 10 Last Payment: 0.00	Referred	0						
Status Name	Positio	n Gender	Patient	Birthday		1		
HofH Guar Ins Smith, Michael Smith, Kim	Single Child	Male Female	Yes Yes	06/30/1989 11/14/2014	^			
					>			

2. Double-click the Primary Dental Insurance block.

The Insurance Information dialog box appears.

🔯 Dentrix Family File - Smith, Michael [SM0001]					_		×
File Edit Help						Denni	s Smith
		2	: 🌆 🖌	7 🔲 🕼		3	
Insurance Information X		hart # S	M0003				
Dental Insurance Medical Insurance 03/04/202	4 4	SS#: DL#:					
Primary Insurance	Bi	irthday: 1	1/14/2014, 9				
Subscriber:	Fee	Sched: <	unia Prov Default≻				
Smith, Michael							
Carrier: Smith, Kim. / New Insurance Plan							
Aetna >>> Smith, Michael / Aetna /					-		
Subscriber ID #: Assign dependent coverage outside family							
Signature on File							
Release of Information		(No Note)				
Assignment of Benefits							
Relation to Subscriber Relation to Subscriber							
C Self C Spouse C Child C Other C Self C Spouse C Child C Other ed By							
Insurance Data Benefits/Coverage Insurance Data Benefits/Coverage red To					-		
Clear Primary Clear Secondary Secondary	iender	Patient	Birthday		-		
	Female	Yes	11/14/2014	<u>^</u>			
Insurance Claim Information OK Cancel							
				~			

3. Under Secondary Insurance, click the Subscriber down arrow, and then click Assign dependent coverage outside family.

The **Select Patient** dialog box appears.

ect P	atient										
Searc	h By Appointn	nents Advanced	Searc	h							
					Show (On Screen Ke	yboard 💽				
	Last Na	ime (Last, First)		O Home Phone							
	C First N	ame (Firet laet)		⊂ Chart #							
	0			0.00.1							
	OPreferre	ed Name		OSS#							
	Enter Last	Name (Last, First)	:								
	bar			Sea	rch						
	Include	e Archived Patients									
юН	Last Name /	First Name /	M	Preferred Name	Phone	Chart #	SSN	Birthday	Status	Provide	~
1	Abbott	Timothy	_	Tim	(801)555-15	AB0003	000-00-0003	2/13/2006	Patient	DDS1	•
	Barnes	Susan				BA0001		10/1/1990	Patient	DDS1	
•	Blank	Arthur				BI 0002			Patient	DDS1	
	Blank	David				BL0005			Patient	DDS1	
1	Blank	Kendra				BL0004			Patient	DDS1	
1	Blank	Melanie				BL0003			Patient	DDS1	
1	Blank	Tommy				BL0006			Patient	DDS1	
-	Bradford	Matt				BR0004		5/13/1986	Non-Patient	DDS1	
1	Bradford	Susie				BR0003		2/5/2010	Patient	DDS1	
•	Brown	Mary		Ms. Brown	(801)555-45	BR0001	000-00-0004	7/15/1991	Patient	DDS1	
•	Crosby	Brent	L		(801)555-59	CR001	000-00-0005	7/16/1976	Patient	DDS1	
	Crosby	Shirley	Н		(801)555-59	CR0002	000-00-0006	11/6/1979	Patient	DDS1	
-					Consider an				··· - ·	>	
revi	ously Selected F	atients									
юН	Last Name	First Name	MI	Preferred Name	Phone	Chart #	SSN	Birthday	Status	Provide	^
	Barnes	Susan				BA0001		10/1/1990	Patient	DDS1	1
•	Jones	David				JO0004		12/14/1998	Patient	DDS1	
•	Jones	John	P	JP		JO0003		12/14/1995	Patient	DDS2	
•	Crosby	Brent	L		(801)555-59	CR001	000-00-0005	7/16/1976	Patient	DDS1	
•	Jenkins	David		Dave		JE0001		10/15/1987	Patient	DDS1	4
2										>	

 Select the patient whose insurance plan will cover the dependent, and then click OK. The Choose one of the existing family plans dialog box appears.

Choose one of the existing f	amily plans				×
Subscriber Name Barnes, Susan	Subscriber ID	Carrier Name Blue Cross Blue Shield	Employer Name	Group Plan Name Allied	Group # 21774
<					>
				OK	Cancel

5. To assign the insurance to the dependent, select it, and then click OK.

The name of the patient and his or her insurance plan appear in the **Insurance Information** dialog box.

Insurance Information	×
Dental Insurance Medical Insurance	
Primary Insurance	Secondary Insurance
Subscriber:	Subscriber:
Smith, Michael 🗾 🗾	(Ext) Barnes, Susan 🗨 🖬
Carrier:	Carrier:
Aetna >>	Blue Cross Blue Shield
Subscriber ID #:	Subscriber ID #:
Signature on File	Signature on File
Release of Information	Release of Information
Assignment of Benefits	Assignment of Benefits
Relation to Subscriber	Relation to Subscriber
C Self C Spouse 📀 Child C Other	C Self C Spouse C Child 💿 Other
Insurance Data Benefits/Coverage	Insurance Data Benefits/Coverage
Clear Primary	Clear Secondary
Insurance Claim Information	OK Cancel

6. Click OK.

Note: (Ext) indicates that the subscriber is from outside the family.

Assigning Insurance Coverage in the Family File

You can now assign insurance coverage in the Family File from a dropdown list.

Important: You can no longer select and assign the same insurance plan for both Primary and Secondary Insurance. If, for example, you select the Primary Insurance Plan from that **Subscriber** dropdown list, that plan is disabled in the **Subscriber** dropdown list under **Secondary Insurance**.

To assign insurance coverage in the Family File

1. In the Family File, double-click the **Primary Dental Insurance** block.

The Insurance Information dialog box appears.

Insurance Information	×
Dental Insurance Medical Insurance	
Primary Insurance	Secondary Insurance
Subscriber:	Subscriber:
Abbott, Ken S 🗾 🖬	Abbott, Patricia 🗨 🖻
Abbott, Ken S / New Insurance Plan	
Abbott, Ken S / Blue Cross Blue Shield / UU Abbott, Patricia / Aetna / 000-00-0002	0-00-0001
Assign dependent coverage outside family	
 Release of Information Assignment of Benefits 	 ✓ Release of Information ✓ Assignment of Benefits
Relation to Subscriber	Relation to Subscriber
● Self ⊂ Spouse ⊂ Child ⊂ Other	C Self Spouse C Child C Other
Insurance Data Benefits/Coverage	Insurance Data Benefits/Coverage
Clear Primary	Clear Secondary
Insurance Claim Information	OK Cancel

- 2. To select an insurance carrier, click the dropdown arrow to the right of the subscriber's name, and then click *Patient Name*/New Insurance Plan.
- 3. Click the Carrier chevron icon.

The Select Primary Dental Insurance Plan dialog box appears.

Select Primary Dental Insuran	ce Plan				×
Enter Employer Name:	Sear O (C)	ch By Carrier Name C Group Plan Employer C Group Number	C Local Numb C Address	oer C Payor ID	
Carrier Name	Group Plan	Employer Name	Group #	Local # Payor ID	Address 🔺
Blue Cross Blue Shield Blue Cross Blue Shield Ameritas Blue Cross Blue Shield American Western Life American Western Life MetLife American Western Life Connecticut General	Allied Allied Allied Plumbing American Express AT&T Carmike Cinemas Central City Clinic Chevron Circuit City Columbia	Allied - Southwest Allied Architects Inc. Allied Plumbing American Express AT&T Carmike Cinemas Central City Clinic Chevron Circuit City Columbia Healthcare	21774 21009 11220 11515 21440 23445 41336 87663 98552 65001	84101 84101 47009 47009 84101 AHG01 65978 AHG01 65978 AHG01 62008	CO, Colorado S CO, Colorado S NE, Lincoln NE, Lincoln CO, Colorado S CA, San Matec CA, San Matec IL, Aurora CA, San Matec CA, San Matec CA, San Matec
New				OK	Cancel

4. Select the patient's new carrier, and then click OK.

The new carrier appears in the **Insurance Information** dialog box.

5. To assign the new carrier to the selected patient, click OK.

Opening the List Manager Edit Menu

The List Manager window now includes an **Edit** menu from which you can change the status or fee schedule of several selected patients at the same time. This new feature will help you manage the Dentrix database more easily. For example, you can now archive multiple inactive patient accounts simultaneously instead of one at a time.

To open the List Manager Edit menu

1. In the Office Manager, click Letters & Custom Lists.

The Letters & Lists dialog box appears.

Letters & Lists 🛛 🗙
Birthday
Continuing Care
Referral
Collection
Inactive Patient
Welcome
Misc
EXIT

2. Click a button, such as Birthday.

The Birthday Letters & Custom Lists dialog box appears.

Birthday Letters & Custo	om Lists		×
Select Letter or Custom Li	st		
Birthday - Adult Birthday - Child	dtxlm13.doc dtxlm14.doc		<u>E</u> dit
Dirtriday - Crilid	dialiti 4.000		New
			<u>D</u> elete
Birth Date Range			
- 1/1-1/31 (<-1993)	>>		
- Generate Letters or Custo			
denoiate Letters of Cust			
<u>C</u> reate Letters	Open in Notegad Open in Excel	Open List <u>M</u>	<u>M</u> anager
Add to Journal when	creating letters		
			Close

3. Click Open List Manager.

The List Manager window appears.

File Edit Preview/Print Heip Change Patient Status Construction Construction<	🛃 De	ntrix List Manager - Birthday - Adult											×
Patent Same Patent Same	File	Edit Preview/Print Help Change Patient Status		a 📕) [G] -		Group By	🐢 Column Nam	es			
Units Keen 1780 Northan Cloco UT 64515 H Karen! Ms. Denris Smith D.D.S. Myers Teresa 2303 Lincoln Cisco UT 84515 (801)555 2066 Terry Dear Ms. Myers. Ms. Denris Smith D.D.S. Revrets Johua 706 Garden Coco UT 84515 (801)555 2725 Mr. Denris Smith D.D.S. Writers Bit Denris Smith D.D.S. D.S. Young Tina 1855 Wahut Cleco UT 84515 (801)555:3043 Mrs. Mara Cook D.D.S.	Patient	Last Name Tablent Tractione MI	Patient Street 1 Patient Street 2	Patient City	Patient State	Patient Zip	Patient Home Phone	Patient Preferred Name	Patient Salutation	Patient Title	Provider 1 Name	Provide	r 1 Title
Myers Teresa 2303 Lincoln Osco UT 94515 (801)555-273 Mat. Dennis Smith D.D.S. Revers Jorhu 706 Garden Osco UT 84515 (801)555-273 Mr. Dennis Smith D.D.S. Writera Bil Dennis Smith D.D.S. D.S. D.S. D.S. D.S. Dennis Smith D.D.S. D.S.	Davis	Karen	1768 Northan	Cisco	UT	84515			Hi Karen!	Ms.	Dennis Smith	D.D.S.	
Reviews Johua 706 Garden Cisco UT 94515 (801)555-2729 Mr. Demis Smith D.D.S. Writens Bil 0 <	Myers	Teresa	2303 Lincoln	Cisco	UT	84515	(801)555-9066	Terry	Dear Ms. Myers,	Ms.	Dennis Smith	D.D.S.	
Writems Bil Dennis Smith D.D.S. Young Tina 1856 Wahut Cisco UT 84515 (801)555-3043 Mrs. Maria Cook D.D.S.	Reeves	Joshua	706 Garden	Cisco	UT	84515	(801)555-2729			Mr.	Dennis Smith	D.D.S.	
Young Tine 1856 Walnut Cisco UT 84515 (801)555-3043 Mm. Maria Cook D.D.S.	Winters	Bil									Dennis Smith	D.D.S.	
	Young	Tina	1856 Walnut	Cisco	υτ	84515	(801)555-3043			Mrs.	Maria Cook	D.D.S.	

- 4. Select a patient or patients, click Edit, and then click one of the following options:
 - Change Patient Status To change the selected patients' status to Patient, Inactive, Non-Patient, or Archive.
 - Change Fee Schedule To change the fee schedules for several patients simultaneously. The Select Fee Schedule dialog box appears.

Select Fee Schedule	×
<none></none> Office Aetna BC / BS Cigna OrlSurg 7. 	^
8. OK Cance	¥

Select the appropriate fee schedule, and then click **OK**.

Note: In the List Manager window, a red X appears for any changes that failed. Successful changes are signified by a green check mark.

5. Close the List Manager window.

Running the Workstation Setup Launcher

The Workstation Setup Launcher allows you to install a new workstation from a single executable file. The tool automatically locates the server on the network or prompts you for a name if it cannot locate one. Once you select a server, the install continues.

To run the workstation setup launcher

- 1. Click the following link to download the Workstation Setup Launcher.
- 2. Open the Workstation Setup Launcher.

When the Workstation Setup Launcher finds a server, the following dialog box appears.

Confirm Server Name
Dentrix Server Detected:
SERVERNAME
Install using this Dentrix server
Search for additional Dentrix servers
Manually enter your Dentrix server name
<u>C</u> ancel

- **3.** Do one of the following:
 - If the server name is correct, click Install using this Dentrix Server.
 - If the server name is incorrect, click **Search for additional Dentrix servers**.

The Workstation Setup Launcher searches for other Dentrix servers, and if one is found, the server's name appears in the **Confirm Server Name** dialog box.

• To enter a server name manually, click Manually enter your Dentrix server name.

The Manually Enter Server Name dialog box appears.

	ОК
Server Name	
Please enter the Dentrix server name	
Manually Enter Server Name	8

• Type the server's name, and then click **OK** to start the install.

10 Dentrix 24.6

Note: If you are prompted for a username and password, the **Windows Security** dialog box appears. Type your username and password, and then select Remember your credentials, or you'll be prompted to enter your credentials every time you open Dentrix.

Windows Security	×
Enter network credenti	als
Enter your credentials to connect	to: SERVER
User name	
Password	
Remember my credentials	
Always Check	Contri
UK .	Lancei
Overview and New Features

This Dentrix 24.5 Release Guide provides information about the Dentrix 24.5 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.5.

Note: For information about using the new features in Dentrix 24.5, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.5?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.5 includes the following enhancements:

MISCELLANEOUS

• You can now more easily open the new Patient Forms website from the Appointment Book, Ledger, Family File, and Office Manager toolbars.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Creating Custom Patient Forms

The Patient Forms feature offers a seamless way for your practice to manage patient forms online. Your patients can update pre-populated forms online before their appointments reducing waiting room time and eliminating the time spent filling in the same form at every visit.

The Patient Forms feature integrates with Dentrix to simplify patient registration, update data automatically, and reduce administrative tasks.

To create a custom patient form

1. In the Appointment Book, Ledger, Family File, or Office Manager, click the Patient Forms toolbar button.

8		Ж			Ø			b	@			R	2	1	i	8	÷.	25	\$			1	\$		
---	--	---	--	--	---	--	--	----------	---	--	--	---	---	---	---	---	----	----	-----------	--	--	---	----	--	--

The login page of the Dentrix Communications website appears.

9 54		0	🗖 🚺 Log in to	× +							
	С	ô	https://loginv2.lh360.com/au	realms/lh360/protocol/openid-connect/auth?client_id=bp-dentrix&sco	e=openid%20email%20profile&response	_type=code&redirect_uri=https% A [%]	Ф	£'≡	<u>ن</u>	··· ·	- 📀
				DEN	TRIX						Î
				Welcome to Dent	rix Communications						
				Email Address							
				Enter your email address							
				Password							
				Enter your password							
				Keep me logged in							
				s	GN IN						
				Forgo	password						
				By logging into your account. <u>Privacy Policy</u> , and to the us	ou agree to our <u>Terms of Use</u> and of cookies as described therein.						
											-

2. To log in, type your email address and password, and then click SIGN IN.

Notes:

- When you've finished using Patient Forms, if you simply close your browser without logging out, the next time you open Patient Forms (from your browser or the Patient Forms toolbar button) Patient Forms will open without requiring you to log in again.
- If you don't log out of Patient Forms, you will be logged out automatically 10 hours after your initial login time.
- To safeguard the confidentiality of patient records, we recommend that you log out of Patient Forms whenever you leave your computer.
- 3. Click Online Forms, and then click Forms Manager.

The **Online Forms** page appears.

			Evans Family~
Online Forms			
You have 11 Online Forms in total.			Q T
	9 .	×	9 .:
Medical History Update Published % Copy link	Copy of Medical History Unpublished % Copy link	Custom Form Unpublished % Copy link	Patient Registration Form Published & Copy link

4. To create a new form, click Add New.

The Select a Form Template page appears.

DENTRIX Communications										
2 Patients	← BACK									
Dnline Forms	Select A Form	Select A Form Template								
Form Manager										
Form Responses										
渝 Settings	Blank Form	Medical History Form	Patient Registration Form	Patient						
Evans Family Dental				Covid-						
185 South 5000 East, Orem Ut, 84128										

- 5. If one of the templates meets the needs of your practice, click it.
- 6. To customize the template, click the Edit icon.

DENTRIX Communications	9									
은 Patients	Medical Hist	Ory Form 🗹								
C Online Forms										
Form Manager	SYNCED QUESTIONS									
Form Responses	Employment Information									
Settings	II Patient Address	MEDICAL HIS PATIENT INFOACKNOWLED								
	Patient Demographics									
	Patient Health History	Medical History								
	II Patient Phone Information	Indicate which of the following conditions you have or have had. By								
Evans Family Dental	Primary Dental Insurance	indicate a "I response indicate a "YES" response, leaving blank will								
Ut, 84128	Primary Medical Insurance									

- 7. Type a patient-friendly name to describe the form.
- 8. To navigate the sections of the form, click the number corresponding to the section you want to edit.
- 9. To edit the contents of a section, click Edit Sections.

		Evans Family							
Dental/Medical History 🗹 🔹 💿 PREVIEW									
YNCED QUESTIONS A									
II Employment Information		Edit Sections							
II Patient Address	MEDICAL HIS PATIENT INFOACKNOWLED								
II Patient Demographics									
Patient Health History	PATIENT INFORMATION	t₁ 🗊 COLLAPSE -							
Patient Phone Information	Responses in this section are required only for fields marked with "*".								
Primary Dental Insurance	Please review other fields and provide responses if the information has changed.								
Primary Medical Insurance									

10. To add a synced question to the form, click and drag it to the form.

In the **Synced Questions** list, the selected question turns gray to indicate that you have added the question to the form.

Note: Synced questions automatically synchronize with Dentrix.

DENTRIX Communication	s	
A Patients	Dental/Medi	cal History 🗹
Form Manager	SYNCED QUESTIONS	
Form Responses ট্রি Settings	Employment Information Patient Address	1 2 3 + O O O O O O O O O O O O O O O O O O
	Patient Demographics	Medical History
	Patient Phone Information	Question
Evans Family Dental 185 South 5000 East, Orem Ut, 84128	Primary Dental Insurance	Employment Information For security reasons, please do not request credit card numbers
	II Primary Medical Insurance	

11. Navigate to the Custom Questions section.

Note: Custom questions can provide you with information tailored to your patients and your practice.

DENTRIX Communicatio	ons		and the strate of the						
2 Patients		N	Nedical History						
D Online Forms	Address								
Form Manager	11 Checkbox	1	Indicate which of the following conditions you have or have had. By checking the box it will indicate a "YES" response, leaving blank will indicate a "NO" response						
Form Responses	II Date								
ঞ্জ Settings	Dropdown List		Employment Information						
	Email	11	Employer name (XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX						
	File Upload		Address Street Address City						
	II Formatted Text		STATE * Zip Code						
	Multiple Textlines								
Evans Family Dental	11 Name		Patient Health History Pre-Med - Amox Pre-Med - Clind Pre-Med - Other						
185 South 5000 East, Orem Ut, 84128	II Number		Allergies Allergy - Aspirin Allergy - Codeine Allergy - Erythro Allergy - Hay Fever Allergy - Latex						

12. Click the custom question that you want to ask, clear any items you want to exclude, and then select the items you want to require an answer for.

Question									
Address									
For security reasons, plea	ase do not request credit card num	bers							
Edit Description Text	Edit Description Text								
Included	Hole/Discobalder Text	Described							
Street Address 1	Street Address 1								
Street Address 2	Count Million 2								
Street Address 2	Sureet Address 2								
City	City								
State	State								
Zip Code	Zīp								
Country	Country								

- 13. To rearrange the sections of the form, drag and drop a section to where you want it to appear.
- 14. To delete a section, click the Trash Can icon.
- 15. To add electronic signatures, from the Custom Questions list, drag Signature to the form.
- **16.** To preview the form, click **Preview**.
- 17. Review the form for any changes you may want to make, and then click Exit Preview.
- **18.** To save the form, click **Save**.

The form is saved to the **Form Manager**, and the newly created form is added to the **Online Forms** page.

Overview and New Features

This Dentrix 24.4 Release Guide provides information about the Dentrix 24.4 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.4.

Note: For information about using the new features in Dentrix 24.4, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.4?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.4 includes the following enhancements:

MISCELLANEOUS

- The number of staff members you can create is no longer restricted to a maximum of 250. While the number is not unlimited, you can, if necessary, create thousands of staff members.
- The "another database has been detected" and the **Dentrix API Udate** dialog boxes have been removed from the update installation process. The another database detected and API update occur automatically in the background and no longer require user interaction.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Setting Up Office Staff

You can set up each employee who uses Dentrix as a member of your office staff if you have not already set him or her up as a provider. You must assign each staff member a unique, four-character, alphanumeric ID.

To set up office staff

1. In the Office Manager, click Maintenance, point to Practice Setup, and then click Practice Resource Setup.

The Practice Resource Setup dialog box appears.

	De estrice D				
	Dentrix L	ental Practice			
	1220 South 630 East #100 American Fork, (555)555-0102	Administrative Contac HIPAA Officer Not Se Fiscal Year: January Bank Number Not Set	t Not Set		
🕤 Opera	tories				
Search	٩				÷
	Title			^	
OP.1	Pad			_	
OP-2	Blue				V
OP-3	Green				~
OP-4	Yellow				***
OP-5	Purple				
OP-6	Orange				r f f f f f f f f f f f f f f f f f f f
007	White			¥	
up ^	Name	т	ale de	Charlon A	
DDC1		1		Sidius "	
DDS1	Smith, Dennis	D	.D.S. 1	rimary Drimany	1
DD32	Cook Maria	D	DS 1	Drimony	
ENDO	Evane Erica	0	DS I	Primany	fiii
HYG1	Haves Sally	н	voiene (Secondary	E-0
ORTH	Oliverson Oscar		, giorito	Primary U	l 🛗
Staff M	lembers D				-
ID ^	Name		Title	Status	
MGR1	Taylor, Judy		Office M.	. Staff	
OFC1	Jones, Susan		Front Des	k Staff	
					Close
					ciose

2. To set up a new office staff employee, click the Add New Staff Member button.

The **Staff Information** dialog box appears.

Staff Info	ormation			×
Name: ID:	Last	Title:	First	MI Suffix
Address	City		ST Zip]
Phone:		Ext:		
E-Mail:				
SS#:			ОК	Cancel

- 3. Do the following:
 - Name Type the staff member's last and first names and middle initial.
 - ID Type a unique, four-character, alphanumeric ID, such as MGR1 or OFC1. Once you create a staff member, you cannot edit his or her ID.
 - Title Type the staff member's title, such as receptionist or office manager.
 - Address Type the staff member's home mailing address.
 - **Phone** Type the staff member's personal telephone number.
 - E-mail Type the staff member's email address.
 - **SS#** Type the staff member's Social Security number.
- 4. Click OK.

Overview and New Features

This Dentrix 24.3 Release Guide provides information about the Dentrix 24.3 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.3.

Note: For information about using the new features in Dentrix 24.3, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.3?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.3 includes the following enhancements:

MISCELLANEOUS

- The Select Patient dialog box has been enhanced and now opens more quickly.
- The Dentrix End-user License Agreement (EULA) has been updated.

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Reviewing the Dentrix End-user License Agreement (EULA)

The Dentrix EULA has been updated. You can review the EULA from any Dentrix module.

To review the Dentrix EULA

1. In any Dentrix module, click Help.

The Help menu appears.

📚 Dentrix Office Manager - Dentrix Dental Practice									
File Reports Letters & Custom Lists Maintenance Anal	ysis Help							Denni	s Smith
🕅 🕼 📓 🕼 🖭 🔍 🔏 🕄 🦪	Dentrix Resource Center	F1	1 1 🗘 📝 😒	25	S	2 📧 💭	B 🕎		8
	Dentitix Help		r						
Date	Chat with Support	ł		Status					
02/09/2021	Dail Remote Assistance	- 1		Displayed	^				
02/10/2021	Agir Cohenement Descurt			Displayed					
02/17/2021	Agir Ennancement Request			Displayed					
04/12/2021	Day About Dentrix			Not Printed Displayed					
04/12/2021	Receipts Day Sneet			Not Printed					
04/12/2021	Adjustment Day Sheet			Not Printed					
04/12/2021	Deposit Slip			Not Printed					
04/12/2021	Day Sheet (Chronological)			Not Printed					
04/13/2021	Day Sheet (Alphabetical)			Not Printed					
04/13/2021	Receipts Day Sheet			Not Printed					
04/13/2021	Adjustment Day Sheet			Not Printed					
04/13/2021	Deposit Slip			Not Printed					
04/13/2021	Day Sheet (Chronological)			Not Printed					
04/14/2021	Day Sheet (Alphabetical)			Not Printed					
04/14/2021	Receipts Day Sheet			Not Printed					
04/14/2021	Adjustment Day Sheet			Not Printed					
04/14/2021	Deposit Slip			Not Printed					
04/14/2021	Daily Collections			Not Printed					
04/15/2021	Day Sheet (Alphabetical)			Not Printed					
04/15/2021	Receipts Day Sheet			Not Printed					
04/15/2021	Adjustment Day Sheet			Not Printed					
04/15/2021	Deposit Slip			Not Printed					
04/15/2021	Daily Collections			Not Printed					
04/20/2021	Day Sheet (Alphabetical)			Not Printed					
04/20/2021	Receipts Day Sheet			Not Printed					
04/20/2021	Adjustment Day Sheet			Not Printed					
04/20/2021	Deposit Slip			Not Printed					
04/20/2021	Daily Collections			Uisplayed					
04/21/2021	Day Sheet (Alphabetical)			Not Printed					
04/21/2021	Receipts Day Sheet			Not Printed					
04/21/2021	Adjustment Day Sheet			Not Printed					
04/21/2021	Deposit Slip			Not Printed					
04/21/2021	Daily Collections			Not Printed	-				
04/26/2021	Day Sneet (Chlohological)			NUC FIINCED					

2. Click About Dentrix.

The About Dentrix dialog box appears.

DENTD	Customer ID:	Serial Number:	Installed Version
	68781	068781-DDF93V08	24.3.0.18888
1987-2024 Henry Schein, Inc.			
Dentrix Application Name	Common Name or Description	App Version \land	What's New
Abconv.exe	Appointment Book Conversion Utility	24.3.0.18888	
ActiveDirectoryUtility.exe	_ActiveDirectoryUtility	24.3.0.18888	Check for Updates
ChangePP.exe	ChangePP	24.3.0.18888	
Chartnum.exe	Chart Number Utility	24.3.0.18888	System Information
ClearDatabaseCorruptionWarning.	ClearDatabaseCorruptionWarning	24.3.0.18888	Due HCD Fureert
_Dbsweep.exe	Database Sweep Utility	24.3.0.18888	KUN HSD Export
DCPU.exe	DBConnectionProtocol	24.3.0.18888	Copyrights
Document.RepairUtils.exe	Document Center Repair Utility	24.3.0.18888	
DTXStartupApp.exe	DentrixStartupApplication	24.3.0.18888	Terms and Condition
ECNum.exe	ECNum	24.3.0.18888	
_edtot.exe	Edit Totals Utility	24.3.0.18888	
FSEATX.exe	FSEATX	24.3.0.18888	
HistEdit.exe	History Editor	24.3.0.18888	
Inscount.exe	Insurance Count Utility	24.3.0.18888 🔍	
		>	

3. Click Terms and Conditions.

The Terns and Conditions dialog box appears.

Terms and Conditions
Dentrix Terms and Conditions
END USER LICENSE AGREEMENT
PLEASE READ THIS AGREEMENT CAREFULLY BEFORE USING DENTRIX. BY ACCESSING OR USING ALL OR ANY PORTION OF THE SERVICES OR BY CLICKING THE 'I ACCEPT' BUTTON AT THE END OF THE AGREEMENT, YOU ACKNOWLEDGE YOUR ACCEPTANCE OF THE AGREEMENT AND REPRESENT THAT YOU ARE AUTHORIZED TO ENTER INTO THE AGREEMENT ON BEHALF OF CUSTOMER. YOU AGREE THAT THIS AGREEMENT IS ENFORCEABLE BY HENRY SCHEIN ONE. LUKE ANY WITTEN REGOTINETED AGREEMENT SINGHE BY YOU IF YOU DO NOT AGREE TO THESE TERMS AND CONDITIONS, YOU HAVE NOT BEEN GRANTED THE RIGHT TO USE THE SERVICES AND YOU SHOULD CLICK ON THE 'I DO NOT ACCEPT' BUTTON AND CANCEL OPERATION OF THE SERVICES.
THE TERMS AND CONDITIONS OF THIS AGREEMENT APPLY TO ANY AND ALL USE OF DENTRIX BY YOU AND YOU AGREE TO BE BOUND BY THESE TERMS AND CONDITIONS REGARDLESS OF THE TYPE OF USE OF THE SERVICES BY YOU.
THIS END USER LICENSE AGREEMENT (this "Agreement") is between Henry Schein One, LLC, a Delaware limited liability company, located at 1220 South 630 East, Suite 100, American Fork, Utah 84003 ("HSOne") and you ("You", "your", "End User", "Licensee"). This Agreement shall become effective on the date on which the Licensee has signed the applicable Quote (the "Effective Date").
HSOne is engaged in the business of developing and providing to its customers certain software products, and You are interested in obtaining a license to certain of HSOne's software products upon the terms and conditions hereinafter set forth.
In consideration of the mutual promises and covenants set forth herein, the parties hereby agree to the following terms and conditions:
1. DESCRIPTION OF AGREEMENT; CERTAIN DEFINITIONS. This Agreement shall govern HSOne's license of its software and Third Party Products (as defined in Section 6(b)), to You. In this Agreement the term "Software" shall mean the machine readable software programs and associated files, whether in packaged form, or received electronically and any modified version, upgrades and other copies of such programs and files which may be provided by HSOne to You; the term "Documentation" shall mean the user's manual(s) and other materials (whether in printed form or delivered electronically related to the Software, and any modified version thereof provided by HSOne to You; the term "Documentation" shall mean the user's manual(s) and other materials (whether in printed form or delivered electronically related to the Software, and any modified version thereof provided by HSOne to You; and the term "Product" shall mean the Software, the Documentation, and any other products or services listed on a Quote; and the term "Quote" shall mean an order form or similar document that references this Agreement.
2. SOFTWARE AND SERVICES.
(a) Delivery of Software and Documentation. The "Delivery Date" shall mean the date HSOne provides to You the Software by a method of download. The Software and Documentation is included in the Software and shall be used by You solely in accordance with the terms of this Agreement and shall be deemed to have been accepted by You on the Delivery Date.
(b) Support and Maintenance. If Licensee elects to have HSOne provide support services for the Software, such support shall be provided in accordance with the terms of the Dentrix Customer Service Plan Agreement and Dentrix Customer Service Plan Details, attached hereto as Exhibit B respectively.
(c) Upgrades. HSOne may from time to time, in its discretion, make available to You modifications or upgrades to the Software. To utilize or receive the maximum benefit from the new features incorporated in such

4. Review the EULA and Exhibits A and B for descriptions of the Dentrix Customer Service Plan Agreement and the Dentrix Customer Service Plan Details, respectively.

Overview and New Features

This Dentrix 24.2 Release Guide provides information about the Dentrix 24.2 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.2.

Note: For information about using the new features in Dentrix 24.2, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.2?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.2 includes the following enhancements:

MISCELLANEOUS

- If you have enabled passwords, you can now easily see who is currently logged in to the Lab Case Manager, Treatment Manager, Treatment Planner, Payment Agreement Manager, Collections Manager, Practice Analysis, Print Preview, and Appointment List.
- In the Appointment Book, when you schedule an appointment for a new patient, you can also create a new family account in the Family File at the same time. By default, you must enter the new patient's first and last names, assign a primary provider, and enter the new patient's birthdate. But, using a new setting in the **Preferences** dialog box, you can elect to not require the patient's date of birth.

Note: For information regarding bug fixes, click https://whatsnew.dentrix.com/blog/2024/02/08/ february-2024-release/

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Miscellaneous

If you have enabled passwords, you can now easily see who is currently logged in to the Lab Case Manager, Treatment Manager, Treatment Planner, Payment Agreement Manager, Collections Manager, Practice Analysis, Print Preview, and Appointment List.

Note: The logged-in user's name appears to the right of the module's toolbar or menu bar as shown by the red highlight box in the examples below.

LAB CASE MANAGER



TREATMENT MANAGER



TREATMENT PLANNER

🥩 Dentrix Treatment Planner - Abbott, Ken S [AB0001]		– 🗆 X
Eile Edit Options View Insurance Help Dennis Smith		
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Treatment Plan Case Setup		
۵ 🗄 🗏 着 🗞 🕸 🖉 🖉 🌾	Case Status: Created: 1/26/2022	Case Severity: None
E Dreatment Plan Created: 1/26/2022	Visit Not Set	
D2160: Amalgam-3 surf. prim/perm [#30 MOD]	Code Th Surf Description	Fee Pat. Portion 5.00 0.00

PAYMENT AGREEMENT MANAGER

l	훩 Payment Agreement Man	ager								-		×
	File Enter Payment Pri	nt Help									Dennis	Smith
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	Guarantor	Next Payment Date	Balance Remaining	Payment Amount	Amount Past Due	Payment Due	Missed Payments	Agreement Note	G N	Mobile Phone		
	Abbott, Ken S.	2/15/2024	\$1,586.71	\$100.00	\$1,510.59	\$1,510.59	16					

COLLECTIONS MANAGER

🏇 Dentrix Colle	ections Man	ager									_		×
File View Setup	Print H	lelp										Denni	s Smith
8 🗟	1	I	2 🗆			🕽 ℞ 🧳	1 📕 🖪)	: G	\$		
Guar Name	Balance	0->30) 31->60	61->90	91->	PA Rem	To Ins	Ins Est	Guar Est	Last Pmt	Pmt A	Amt	Amt D
Abbott, Ken S	1991.71	1991.71	0.00	0.00	0.00	1586.71	190.00	190.00	1801.71	02/17/2021	100	0.00	1510.

PRACTICE ANALYSIS

8	Dentrix Pra	ctice An	alysis (All)				—		×
File	Reports	Setup	Change Page	Comparison	Help			Dennis	Smith
Pro	duction Ar	nalysis	02/02/2024	-02/02/2024	MTD-Cur	AVG 11/2023-01/2024	· · · · ·	YTD-Cur	

PRINT PREVIEW

🍓 Dentrix Print Preview			×
File Options Help		Dennis	Smith
Daily Collections	Page: 1	of 1	

APPOINTMENT LIST

🔓 Dentrix Appointment List	- 0	×
File Appointment Status Setup Help	Der	nnis Smith
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其 🗸 🖾 🎁 🔯 🐏 🐏 🎥 💽 🛥 🔃 Select List: Unscheduled 🔹		
🛞 💮 💈 2/ 2/2024 💌 🌛 🛞 Viewing: All Search	م م	

Scheduling New Patient Appointments and Creating New Family Accounts

In the Appointment Book, when you schedule an appointment for a new patient, you can also create a new family account in the Family File at the same time.

To schedule a new patient appointment and create a new family account

1. In the Appointment Book, double-click an open schedule space.

The **Select Patient** dialog box appears.

iearcl	By Appoint	ments Advanced	d Search	h						
					Show (On Screen Ke	yboard 🕟			
	() and N	ama (Last Eirat)					•			
	C Last IV	ame (Last, First)		O Home Phone						
	⊖ First N	lame (First, Last)		⊖Chart #						
	O Prefer	red Name		⊖ss#						
	Enter Las	st Name (Last, Firs	st):							
	I			Sear	rch					
~н	l aet Name	First Name	M	Preferred Name	Phone	Chart #	SSN	Birthday	Statue	Provider
	Last Name	T fractivalitie	1MI	Treferred Name	THONE	Chart#	0014	Dirtitiday	Jiaius	Trovider
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revio	usly Selected	Patients				1				
revio	usly Selected	Patients						1	1_	
Previo IoH	usly Selected Last Name	Patients First Name	MI	Preferred Name	Phone	Chart #	SSN	Birthday	Status	Provide
Previo IoH	usly Selected Last Name Davis	Patients First Name Karen	MI	Preferred Name	Phone Contract Co	Chart # DA0003	SSN 000-00-0007	Birthday 1/15/1984	Status Patient	Provide DDS1
Previo IoH	usly Selected Last Name Davis Crosby	Patients First Name Karen Brent	MI	Preferred Name	Phone (801)555-59	Chart # DA0003 CR0001	SSN 000-00-0007 000-00-0005	Birthday 1/15/1984 7/16/1976	Status Patient Patient	Provide DDS1 DDS1
Previo	usly Selected Last Name Davis Crosby Smith	Patients First Name Karen Brent Michael	MI	Preferred Name	Phone (801)555-59	Chart # DA0003 CR001 SM0001	SSN 000-00-0007 000-00-0005	Birthday 1/15/1984 7/16/1976 6/30/1974	Status Patient Patient Patient	Provide DDS1 DDS1 SURG
revio oH	usly Selected Last Name Davis Crosby Smith Jenkins Peorfeed	Patients First Name Karen Brent Michael David Savia	MI	Preferred Name Dave	Phone (801)555-59	Chart # DA0003 CR001 SM0001 JE0001 BE0002	SSN 000-00-0007 000-00-0005	Birthday 1/15/1984 7/16/1976 6/30/1974 10/15/1987 2/6/2010	Status Patient Patient Patient Patient	Provide DDS1 DDS1 SURG DDS1 DDS1

2. Type the first few letters of the patient's last name to ensure that the patient's name is not in the Dentrix database already, and then click New Family File.

Th	e Heac	l-of-House	Information	dialog	box	appears.
----	--------	------------	-------------	--------	-----	----------

Head-of-House Information	×
Name Last* First* MI Jones David Salutation Title	Preferred
Status Patient Male Single Personal Birthdate* Age SS# Other ID	Office Prov1* Prov2 Fee Schedule <none> Chart Consent</none>
Driver's License #	Child Constraint Constraint
City ST Zip >> E-Mail >>	Ind conspondence Disclosure restrictions Visits First Visit Last Visit
FAX Mobile Other	Last Missed # Appt Missed
>> <u>C</u> lear	OK Cancel

- 3. Provide the following mandatory Information:
 - Type the patient's Last and First names in the corresponding fields.
 - Under Office, click the Prov1 search icon, select the patient's primary provider from the Select Provider dialog box, and then click OK.

Select Pro	ovider			×
ID	Name		Status	^
DDS1 DDS2 DDS3 DR99 END0 ORTH	Smith, Dennis Smith Junior, Dennis Cook, Maria DentrixDental, Practice Evans, Erica Oliverson, Oscar Childe, Denda		Primary Primary Primary Primary Primary Primary	
DEDI	OK	Cancel	Primary Drimary	~

• Under **Personal** in the **Birthdate** field, type the patient's date of birth.

Note: If you prefer not to require a new patient's birthdate, you can disable this requirement by clearing the option in the **Preferences** dialog box in the Office Manager.

 To close the Head-of-House Information dialog box, click OK. The Appointment Information dialog box appears.

Appointment Information - (Jones, David) <new patient=""></new>		×
Provider: DDS1 > Continuing Care:	>	Created
Add'I Provider: Beason Use Reason to Auto U	Jpdate CC	Last Changed
Initial Add Tx	Delete Del. All	History More Info (Dial)
Misc.		Patient Info
Appointment Description Ap	pt Length	Other Appt(s)
0	min ≻	Ins Claim Info
Amount: 0.00 Status: <none> • 0p: 0P-2</none>	>	Schd. Next
Eligible: Schedule: FIXED Date: 01/30	72024 >	Wait/Will Call
Staff: > Type: <none> Time: 9:00a</none>	am >	Find
Dentrix Pay F	Payment	Pinboard
Notes Insert Datelii	ne 💞	Lab Case
	~	Patient Lab Cases
		ОК
		Cancel
	~	
Confirmed Pre-Med X-rays Requested More Appts 5 0ffice Re-schd X-rays Received Update Heal Patient Re-schd Sent New Patient Pkg Update Ins In	õchd th Hist □ nfo □	Other Family Appts HIPAA Signed Review Finances

5. Click Initial.

The Select Initial Reasons dialog box appears.

Select Initial Rea	sons		×
Ex LimitEx CompEx FMX TopFlrideVar Pano Bwx2	Bwx4 DiagCast Prophy Prophy-Ch PerMaint EmergTx New Patient	CC-Prophy CC-Comp CC-Child PerioEx	
	ОК	Cancel	

6. Select New Patient, and then click OK.

The following message appears.

Dentrix Continuing Care	×
One or more of the selected procedures is attached to a Continuing Care Type that was not set up for this patient. Set up Continuing Care for this patient using the default settings?	
Yes No	

- 7. Click Yes to set up continuing care for the patient using the default settings.
- 8. To schedule the appointment and close the Appointment Information dialog box, click OK.

Overview and New Features

This Dentrix 24.1 Release Guide provides information about the Dentrix 24.1 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 24.1.

Note: For information about using the new features in Dentrix 24.1, refer to "Using the New Features and Enhancements" in this section of the Release Guide or "What's New in Dentrix 24.1?" in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 24.1 includes the following enhancements:

MISCELLANEOUS

- If you have enabled passwords, you can now easily see who is currently logged in to the Patient Chart, Perio Chart, Continuing Care, Office Journal, Questionnaires, and Document Center.
- You can now run a new report called the Patient Payment Report to review a patient's payments that were applied during a date range.
- The Sample or Tutor database has been renamed to the Demo database. The Demo database is a training tool that you can use to train you and your employees how to use the Dentrix modules without affecting your practice's "live" database.
- The CDT codes have been updated.

Note: For information regarding bug fixes, click https://whatsnew.dentrix.com/blog/2024/01/26/ january-2024-release/

Using the New Features and Enhancements

The following information will help you understand how to use the features and enhancements in this release. For a more complete explanation of the new features and enhancements, please refer to the Dentrix Help.

Miscellaneous

If you have enabled passwords, you can now easily see who is currently logged in to the Appointment Book, Family File, Ledger, and Office Manager.

Note: The logged-in user's name appears to the right of the module's toolbar or menu bar as shown by the red highlight box in the examples below.

PATIENT CHART



PERIO CHART

🚺 Dentrix Perio Chart - Crosby, Brent L. DDS1 (New Exam: 1/19/2024, Last Exam: 2/2/2022) —								
<u>File * View * Setup * H</u> elp * •								
🗓 🍺 🎡 🎒 🚺 🕼 🕅 🚦 🚺 🕵 📮 Script Dentrix Default Script 🔍 📮 Dennis Smith 🔹								
😼 🛑 🗟 🔲 🍐 🕡 Crosby, Brent L								

CONTINUING CARE

🧠 Dentrix Continuing Care - Crosby, Brent L [CR001]								-		
File Edit Views Status Office Journal De								Dennis Smi	th	
	ALL -> ALL								ALL	
	Date	Туре	Appt?	Status	Prior Treat.	Name	Age	Prov.	Phone	
	01/09/2021	PANOREX				*Crosby, Brent I	47	Prov1	301)555-5969	1

OFFICE JOURNAL

🖉 Dentrix Office Journal - Crosby, Brent L [CR001]	-		×
File Edit View Help		Denni	is Smith
গ 📄 🍓 🞏 🎞 🖏 🔍 📝			
□- 🖏 05/12/2023 └ 🚯 Amount: \$25.00, Check # 1256 Check Payment - Thank You	Patient Payr	ment	

QUESTIONNAIRES

🕮 Questionnaires - Davis, Karen [DA0003]		– 🗆 🗙
🕅 🙉 📓 🚺 💺 🖣 💋 🗆 🗔 🞯	🕂 😥 🖉 🗐 🐲 🖽 🗈 🛊 , 🌬 🙀 🖉 🍓 🕡 Davis, Karen 🛛 🖓	Dennis Smith 🔻
🔃 🍙 · 💀 🎎 ዬ 📴 📴 🐯 🐯	S № [0].	
Form Name Completed [1 item]	Response Date Expiration Date Update Patient I Dentrix Dental Practice	
Patient Information Form	12/20/2022 No Expiration Done 1220 South 630 East #100 • American Fork, UT 84003	(801)763-9300

DOCUMENT CENTER

🗸 Dentrix Document Center - Crosby, Brent L [CR001] -	-		×
Eile <u>E</u> dit <u>Vi</u> ew <u>A</u> cquire <u>S</u> etup <u>H</u> elp <u></u>		Dennis S	mith 🝷
🛛 🙀 🔯 📓 💺 🦓 🌽 🗂 🖅 🖾 🐼 🖶 뵭 🤉 🖉 🏄 語 🥎 🎲 💶 🐇 💆 Crosby, Brent L		-	
i 🛷 - 🔄 🖡 🐄 🏗 📁 🔎 🚺 🍓 🗆 🎦 🕒 🕼 🕲 🖓 🐁 👘 . 🗏 🖯 🛃 🖑 🖇 💿 🔲 🍰 🕹 .			

Dentrix Reports

You can now run a new report called the Patient Payment Report to review a patient's payments that were applied during a date range.

To run a Patient Payments Report

1. In the Office Manager toolbar, click the Dentrix Reports button.

The Dentrix Reports window appears.

📜 Dentrix Reports			
≜₽₽₽₩ 🕯 🖓			
Search D	Search	Q	
Reports	Date	Description	1
Accounts Receivable Trends Report	07/29/2022	. Accounts Receivable Trends Report	
Adjustment Summary	11/01/2022	Adjustment Summary	
Continuing Care Statistics	11/02/2022	Provider Aging Report	
Daily Provider Transactions Report	11/17/2022	Scheduled Production Forecast	
Insurance Payment Summary	08/02/2023	. Daily Provider Transactions Report	
Insurance Transaction Analysis	08/02/2023	. Patient Overview	
Patient Parmente			-
Payment Summary			
Practice Goals Analysis	-		
Procedure Summary			
Provider Aging Report			
Referral Analysis			
Schedule Summary Report			
Scheduled Production Forecast	2		
	-		
	-		
	<	>	>

2. Under Reports, double-click Patient Payments. The Patient Payments dialog box appears.

📮 Patient Payments	×
Options:	0
Default ~	۵ 🔮
Select Date	
O Range 12/01/2023	- 12/31/2023 31
Previous month	
Select Patient	
From: <all></all>	\diamond
To: <all></all>	♦
Save Options	OK Cancel

3. To run the report with the default settings, click OK.

The Patient Payments Report is listed, and a preview of the report appears.

Note: You may need to enlarge the Dentrix Reports window and go to the end of the report to view all of the data including the total amount.

📜 Dentrix Reports											×
≜₫₽₩ 🖬 🕻	3										
Search 🔎	Search	Q									
Reports ^ Accounts Receivable Trends Report Adjustment Summary	Date 07/29/2022 11/01/2022	Description Accounts Receivable Trends Report Adjustment Summary		Patient all payment typ	Payments ®	by entry date			Dentrix 1220 S Americ	Dental Pr outh 630 i an Fork, U	ractice East #100 JT 84003
Continuing Care Statistics	11/02/2022	Provider Aging Report		Payments for 1	2/01/2021 - 12/31/	2023					
Daily Provider Transactions Report	11/17/2022	Scheduled Production Forecast		Proc Date	Entry Date	Name	Description	Prov			Amount
Insurance Payment Summary	08/02/2023	. Daily Provider Transactions Report		01/31/2023	01/31/2023	Abbott, Ken S	Dental Ins Check Payment	DDS1			0.00
Insurance Transaction Analysis	08/02/2023	. Patient Overview		04/12/2022	04/12/2022	Davis, Karen	Dental Ins Check Payment	DDS1			-350.00
New Patient Summary	01/19/2024	. Patient Payments		01/31/2023	01/31/2023	Smith, Michael	Medical Ins Check Payment	SURG			-200.00
Patient Payments				04/07/2022	04/07/2022	Crosby, Brent L	Dental Ins Check Payment	DDS3			-140.00
Payment Summary				05/12/2023	05/12/2023	Crosby, Brent L	Check Payment - Thank You	DDS1			-25.00
Practice Goals Analysis											
Procedure Summary	-		-	Total							-715.00
Provider Aging Report											
Sebedule Summer Peret											
Scheduled Breduction Forecast											
Scrieduled Froduction Forecast											
			>								
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- 4. To modify the default settings in the **Patient Payments** dialog box and generate a new Patient Payment Report, double-click **Patient Payments** again, and then do one or more of the following:
 - Select Date You can set a specific date range or select a set of interval options.
 - **Range** Enter the start and end dates, or click the date icon, and then select the date from the calendar.
 - Date options Defaults to the **Previous month**. For example, if you generate a report on June 2, 2023 using this option, the report will contain data for May 1 through May 31. Other options include:
 - Current day Generates a report for the current day.

- **Previous day** Generates a report for the previous day. For example, if you generate a report on June 2, 2023 using this option, the report will contain data for June 1, 2023.
- **Previous week** Generates a report for the previous Sunday through Saturday. For example, if you generate a report on Monday, June 5, 2023 using this option, the report will contain data for Sunday, May 28 through Saturday, June 3.
- **Previous 3 months** Generates a report for the previous 3 months. For example, if you generate a report on June 2, 2023 using this option, the report will contain data for March 1 through May 31.
- **Previous 6 months** Generates a report for the previous 6 months. For example, if you generate a report on June 2, 2023 using this option, the report will contain data for December 1, 2022 through May 31, 2023.
- **Previous year** Generates a report for the previous year. For example, if you generate a report on June 2, 2023 using this option, the report will contain data for January 1, 2022 through December 31, 2022.
- Select Patient Defaults to all patients. To select a patient or a range of patients, click the search buttons, and then select the patient or patients from the Select Patient dialog box.
- 5. To save any changes you made to the default settings, click Save Options.
- 6. To manage any saved options, click the Manage Saved options icon.

The Manage Options dialog box appears.

🛃 Manage Options		×
Options:		
Default - 1		
		X
	Clo	se

- 7. Do one of the following:
 - To rename an option, select it, click the Rename Selected Item icon, and then type a new name.
 - To delete an option, select it, and then click the Delete Selected Item icon.

Important: You can only rename or delete options that you have created.

Demo Database

The Sample or Tutor database has been renamed to the Demo database.

To open the Demo database

 In the Office Manager, click Maintenance, point to Practice Setup, and then click Preferences. The Preferences dialog box appears.

eneral Options Print Options Statement Forms Paths [Database Options
Payment/Adjustment Options Provider: To Guarantor's Primary Provider Patient: Family Account Split Method: Guarantor Estimate Payment Agreement Settings This recommended that payments/adjustments be allocated to a specific patient and not the entire family. Startup Options Automatic Updates Settings System Startup Settings Automatically Launch Office Journal Default Signature on File for New Subscribers Dental Insurance: Release of Information Assignment of Benefits Medical Insurance: Release of Information Re	Additional Options Instances of Treatment Planner: Perio Beep on Entry Suspend Patient Alerts Suspend Referral Print Reminders Hide Social Security Number Set default dentition to primary for all new patients ages 10 Automatically Launch Select Patient Auto View Patient Note in Family File Require Referred By for new patients Signature Device: Pointing Device

2. Click the Database Options tab.

Preferences	×
General Options Print Options Statement Forms Paths Database Options	
Default Database	1
If you switch to a different database, you will need to restart Dentrix to apply the change.	
C Production Database	
Demo Database 1/19/2024	
A demo date will be used as the "current date" for the demo data.	
OK Canc	el

3. Select **Demo Database**, and then click **OK**. The following message appears.



- 4. Click OK to close the message and shut down eServices.
- 5. Do the following:
 - Close the Office Manager and any other Dentrix modules that you have open.
 - Re-open the Office Manager by double-clicking the Office Manager desktop icon. A message appears.
- Click OK to close the message and open the Demo database.
 The Office Manager window appears with the Demo database open.
- Open any other Dentrix modules that you want to improve your skills on.
- 8. To close the Demo database, close all of the Dentrix modules that you opened for training.
- 9. To switch to your "live" database re-open the Office Manager.