Dentrix Overview

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Agenda

- What is Dentrix
- Dentrix Ledger vs. Dentrix Office Manager
- How to get access to Dentrix
- Overview of Dentrix Ledger
- MHS Genesis 1DOD Dental Workflows
- Workflows
  - Adding insurance
  - Creating a dental claim
  - Posting payments and adjustments
  - Generating a billing statement
- Dentrix reports

What is Dentrix?

- Dentrix is the dental billing solution utilized within the MHS Genesis electronic health record system.

- Dentrix Ledger vs. Dentrix Office Manager:
  - **The Dentrix Ledger** is where patient accounts and billing activities are managed, including claim creation, posting of payments and adjustments, and patient statement creation.
  - **The Dentrix Office Manager** is the "home page" for the Dentrix module. Within the Office Manager, you can see the batch processor and view document previews for your facility.
    - For example, if a statement is generated from the Dentrix Ledger and sent to batch, it will be visible from Dentrix Office Manager and the print preview can be viewed.

P0630 Dentrix Ledger

P0630 Dentrix Office Manager

1DOD Dental Workflows

[MHS Genesis Workflow Library Link](#)

- **Message Center, Patient Documents, and Demographics**
  - 1DOD – Dental – Insurance Claims Generation, Review, and Submission (Patient Accounting)
  - 1DOD – Dental – Manage Message Center
  - 1DOD – Dental – Review or Add a Document in the Dentrix Document Center (Patient Accounting)
  - 1DOD – Dental – Add or Modify a Dental Health Plan (Patient Accounting)
- **Claims, Insurance Payments, Adjustments, and Statements**
  - 1DOD – Dental – Insurance Claims Generation, Review, and Submission (Patient Accounting)
  - 1DOD – Dental – Insurance Payment Processing and Posting (Patient Accounting)
  - 1DOD – Dental – Insurance Batch Payment Posting (Patient Accounting)
  - 1DOD – Dental – Applying Debit and Credit Adjustments (Patient Accounting)
  - 1DOD – Dental – Insurance Payment Processing and Posting (Patient Accounting)
  - 1DOD – Dental – Applying Debit and Credit Adjustments (Patient Accounting)
  - 1DOD – Dental – Insurance Payment Processing and Posting (Patient Accounting)
  - 1DOD – Dental – Patient Billing Statement Generation (Patient Accounting)

1DOD Dental Workflows (continued)

- **Patient Payments, Non-Covered Procedures, and Payment Plans**
  - 1DOD – Dental – Elective (Non-Covered) Dental Procedure – Billable (Patient Accounting)
  - 1DOD – Dental – Self-Pay and Patient Balance Posting (Patient Accounting)
- **Dental Patient Accounting Reports**
  - 1DOD – Dental – Patient Account Reconciliation (Patient Accounting)
  - 1DOD – Dental – Create or Adjust a Patient Payment Plan (Patient Accounting)
  - 1DOD – Dental – Patient Account Reconciliation (Patient Accounting)
  - 1DOD – Dental – Adjust Incorrect Postings (Patient Accounting)
  - 1DOD – Dental – Patient Billing Statement Generation (Patient Accounting)
  - 1DOD – Dental – Revenue Cycle Management Reporting (Patient Accounting)
  - 1DOD – Dental – Day Sheet Report – General Ledger (Patient Accounting)
  - 1DOD – Dental – Suspended Credits – Refunds – Negative Balances (Patient Accounting)

Additional Dentrix Resources

- Within the Dentrix Ledger, select Help > Contents from the menu bar.
  - Similar to the "Learning Live" function in PowerChart, the Contents option will bring you to a library of tip sheets on various Dentrix processes.
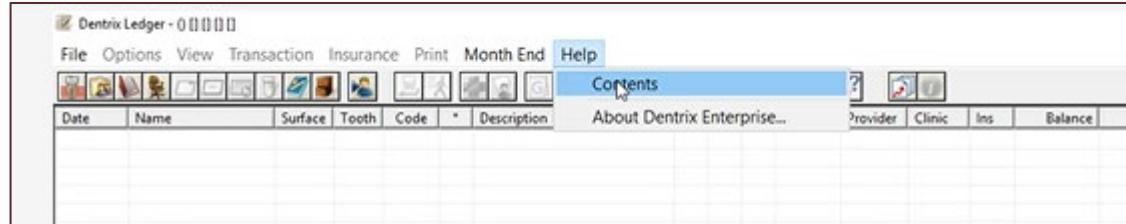
How to access Dentrix

- Dentrix can be accessed from the Citrix storefront.
  - [Citrix Storefront link](#)
  - If you do not currently have access to Dentrix, please work with your local Training Roles Manager (TRM) to open an account request. You may be required to complete a training course in JKO prior to your access being approved.
- To log in, select your Clinic ID which will be your UBO and your DMIS ID
- Select Sign In.

DENTRIX Enterprise Security

Enter Clinic ID that you want to enter

Clinic ID: UBOENT

☐ Save Clinic ID as Default

Sign In   Cancel

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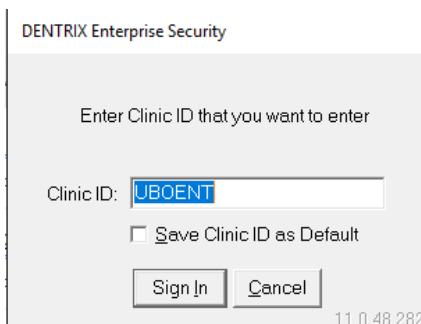
Overview of Dentrix Ledger

- **The Dentrix Ledger** is where patient accounts and billing activities are managed, including claim creation, posting of payments and adjustments, and patient statement creation.
    - **Viewing Financial Transactions:** Provides a detailed log of all charges, payments, and adjustments for each patient account.
    - **Payment Posting:** Streamlines the process of entering payments received from insurance and patients directly into their respective accounts.
    - **Claims Management:** Displays the status of submitted claims and allows for adjustments as necessary.
    - **Balance Reconciliation:** Enables easy comparison of account balances against transactions for better accuracy.
    - **Generating Reports:** Supports the creation of financial reports for auditing and reconciliation purposes.
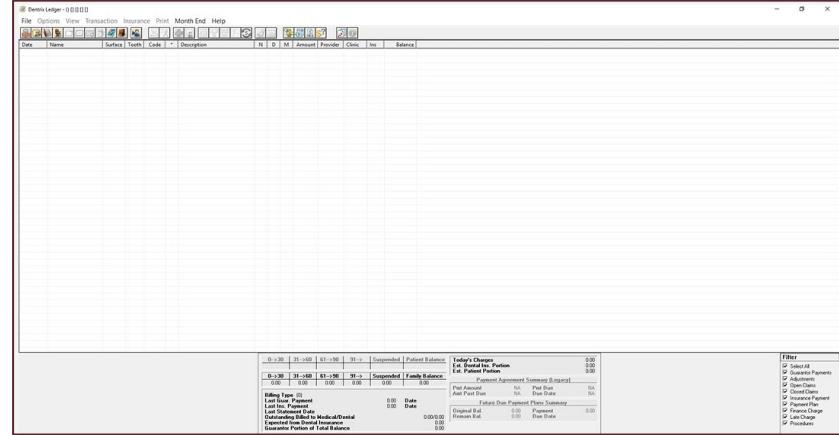
Menu Options

- The Dentrix Ledger window consists of the menu bar, toolbar, transaction log, and various sections containing financial information.
  - The toolbar contains several buttons you can click to access certain areas or features of Dentrix.
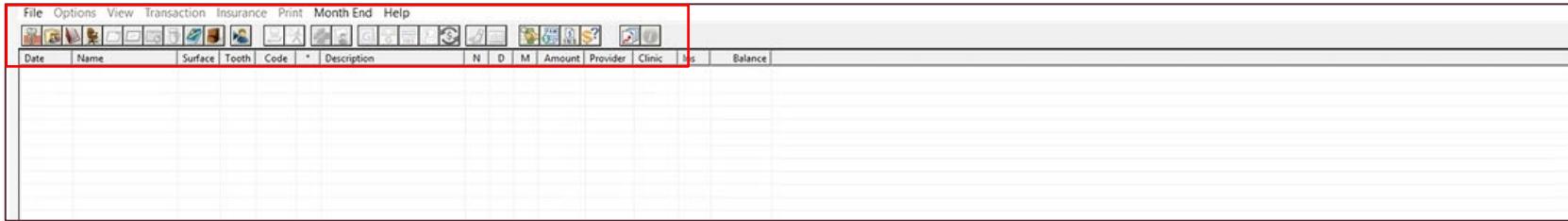
Menu Options

- The same options from the menu bar can also be located by selecting File > Switch To
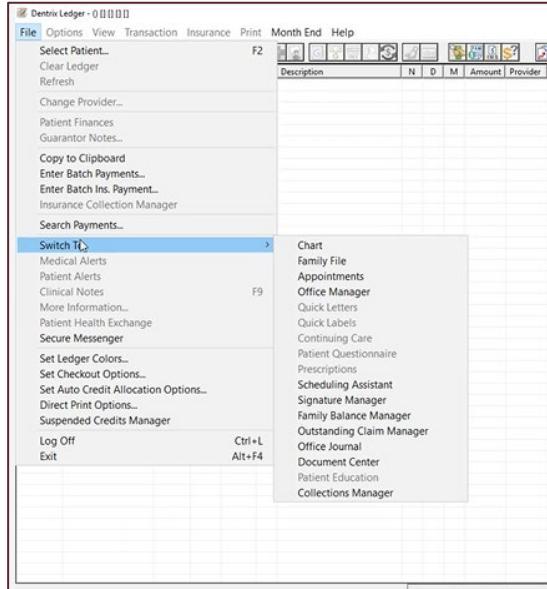
Family File

- The Family File (button with a file folder and two people) contains demographic and insurance information for the patient and associated family members.

- Within the Family File, you can expand the different sections by double clicking into that section

Family File (2)

- Family File > Patient Information section expanded:

Document Center

- The Document Center is where patient documentation is uploaded (ex: scanned insurance cards). Documents in the Dentrix Document Center can also typically be found in the Images tab in PowerChart.
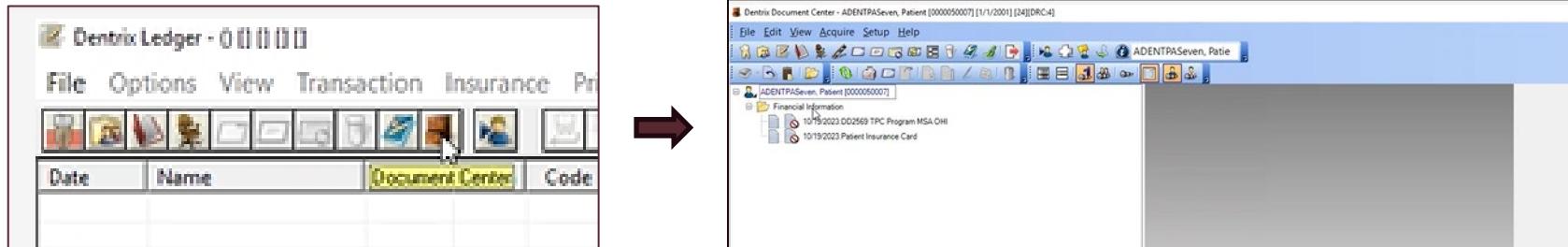
Document Center – Viewing Scanned Insurance Cards

- To view a document, such as an insurance card in the Documents Center, double click on the document name to view.
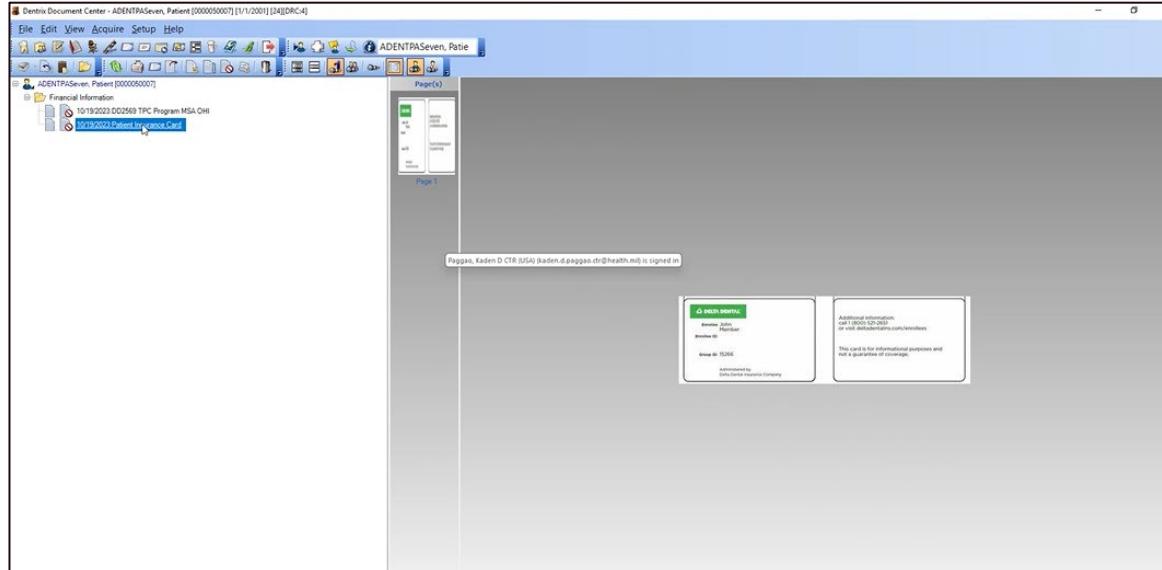
Searching for a Patient

- To search for a patient in the Dentrix ledger, select File > Select Patient, OR click the Select Patient button from the menu bar
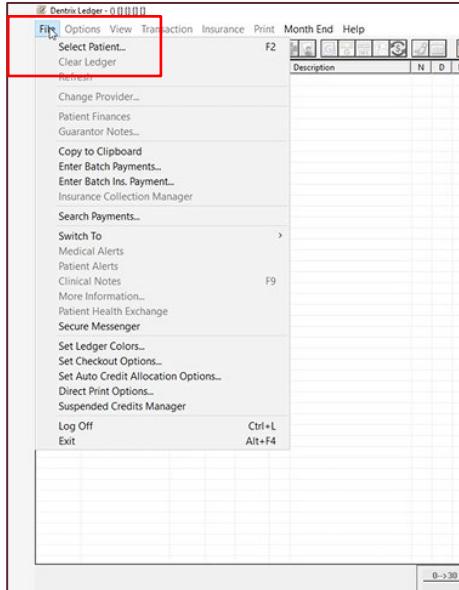
Searching for a Patient (2)

- It is recommended to use the Advanced Search option, as this allows you to search using multiple patient identifiers.
  - Search for a patient by their DoD ID by selecting ID type of EDI PI
  - Under Clinic, select This Clinic to only search for your facility
  - Select Search to search for the patient

Searching for a Patient

- Search Results will populate
- Once you have located the patient, highlight the line item and select OK

Ledger

- Once a patient is selected, the ledger will populate.
  - The ledger is a running list of all procedures, payments, and adjustments for that patient

Ledger Key:
- Red: Primary dental claim that was sent but not received
- Blue: Primary dental insurance payment
- Purple: Dental claim that has been received
- Green: Patient payment
- Black: Completed treatment

Ledger

- To filter items in the Ledger, select View > Transaction Filter

Ledger

- The following information will populate at the bottom of the ledger, and can be filtered if needed:
  - Billing Type
  - Patient Balance and Family Balance
  - Outstanding Billed to Dental
  - Last Statement Date
  - And more

MHS Genesis Dental Workflows

- Workflows
  - Adding Dental Insurance
  - Creating a Dental Claim
 - Posting payments and adjustments
  - Generating a billing statement

Adding Dental Insurance

- Click the Family File button
- Double-click the Insurance Information pane from the Family File
- Coverage Order: Select the coverage order where you would like to add the Dental Plan
- Click the Subscriber Search button (double greater than icon)
- Click Current Patient
- Click the Carrier Search button (double greater than icon)
- Enter Carrier Name box: Enter name of dental plan
- Click the Search button (double greater than icon)
- Carriers Name list
- Select the desired plan then click Ok
- Subscriber ID box: Enter the patient's subscriber ID
- Signature on File list box: Check the Release of Information checkbox if patient has a current & signed DD form 2569 in the Insurance Information dialog box.
- Check the Assignment of Benefits Checkbox if your office supports it.
- Relation to Subscriber list box: Self or subscriber of dental plan
- Click Ok

Adding Dental Insurance (2)

Adding Dental Insurance (3)

Note: If you can't find the plan you're looking for, do not click "New Insurance Plan". Please notify DHA NCR J-1/8 Mailbox UBO-Health-Plan-Requests dha.ncr.j-1-8.mbx.ubo-health-plan-requests@health.mil. DHA UBO must approve new health plan additions.

Creating a Dental Claim

- Generate a Dental Claim
  - From the Ledger, click desired treatment (or multiple treatment) to create an insurance claim
  - Click the Ins. Select button
  - Double – click Prim Dental Claim in the description column
  - Click Print
  - Click Send to Batch
  - Click the Close button (X icon) to close the Primary Dental Insurance Claim dialog box
  - Click the Office Manager button
  - Batch Processor list: Dental Insurance Claim form
  - Double click the claim in the Batch Processor to generate a print preview
  - Click the Print button
  - Click the Close button (X icon) to close the Print Preview window
  - Click the Close button (X icon) to close the Office Manager
- **Note:** The majority of dental services will be for Tricare beneficiaries. These procedures are automatically adjusted off with a Tricare adjustment.

Creating a Dental Claim (2)

Date	Name	Surface	Tooth	Code	*	Description	N	D	M	Amount	Provider	Clinic	Ins	Balance
01/06/2022	Patient ADENTPAFive			D0120		Periodic oral evaluation				50.00	AOMFS...	MHSGE...		50.00
01/06/2022	Patient ADENTPAFive			D0330		Panoramic film				125.00	AOMFS...	MHSGE...		175.00
01/06/2022	Patient ADENTPAFive			Ins		Prim Dental Claim - Sent 175.00						MHSGE...		175.00
01/14/2022	Patient ADENTPAFive	MOD	3	D2393		Resin composite-3s, posterior				250.00	AOMFS...	MHSGE...	No	425.00
01/14/2022	Patient ADENTPAFive	MOD	4	D2393		Resin composite-3s, posterior				250.00	AOMFS...	MHSGE...	No	675.00
01/14/2022	Patient ADENTPAFive	MOD	14	D2393		Resin composite-3s, posterior				250.00	AOMFS...	MHSGE...	No	925.00

Date	Name			Code		Description				Amount	Provider	Clinic	Ins	Balance
07/15/2022	Patient ADENTPAFive			D0274		Bitewings-four films				60.00	AOMFS...	MHSGE...	No	2110.00
07/15/2022	Patient ADENTPAFive			D0120		Periodic oral evaluation				50.00	AOMFS...	MHSGE...	No	2160.00
04/04/2025	Patient ADENTPAFive			Ins		Prim Dental Claim - Sent 750.00						MHSGE...		2160.00

Creating a Dental Claim (3)

Creating a Dental Claim (4)

Posting Payments & Adjustments

- Post a Dental Insurance Payment
  - Double – click the desired claim
  - Click enter payment in the Insurance Claim dialog box
  - Amount box: Amount of Insurance payment
  - Apply a payment method (Check, Bank/Branch #, Etc.)
  - Review the balance for each procedure
  - Double – click the cell in the Applied column of the procedure
  - Applied Amount box: Desired amount to apply from payment
  - Click OK

Posting Payments

Posting Payments (2)

Posting Payments (3)

Date	Th	Surface	Code	Description	Provider	Charge	Oth Ins	Guar Cr	Ins Est	Ins Amt	Applied	Balance
01/14/22	3	MOD	D2393	Resin composite-3s, posterior	AOMFSDR10	250.00	0.00	0.00	0.00	0.00	0.00	250.00
01/14/22	4	MOD	D2393	Resin composite-3s, posterior	AOMFSDR10	250.00	0.00	0.00	0.00	0.00	0.00	250.00
01/14/22	14	MOD	D2393	Resin composite-3s, posterior	AOMFSDR10	250.00	0.00	0.00	0.00	0.00	0.00	250.00

Edit Ins Payment Amount For Procedure

Insurance Amount: 0.00

Update Payment Table

Applied Amount: 80.00

OK

Pre-Treat Estimate: 0.00

Current Coverage: 0.00

Cancel

Applied

0.00

Date	Th	Surface	Code	Description	Provider	Charge	Oth Ins	Guar Cr	Ins Est	Ins Amt	Applied	Balance
01/14/22	3	MOD	D2393	Resin composite-3s, posterior	AOMFSDR10	250.00	0.00	0.00	0.00	0.00	80.00	170.00
01/14/22	4	MOD	D2393	Resin composite-3s, posterior	AOMFSDR10	250.00	0.00	0.00	0.00	0.00	120.00	130.00
01/14/22	14	MOD	D2393	Resin composite-3s, posterior	AOMFSDR10	250.00	0.00	0.00	0.00	0.00	120.00	130.00

Posting a Payment from Patient

- Post a Patient Payment
  - Click the Enter Payment button from the Dentrix Ledger
  - Amount box: Amount of the payment
  - Check # box: If applicable
  - Type list: Select Payment Type
  - Review/verify the amount in the table
  - Click OK/Post

Posting a Payment from Patient (2)

Note: It is crucial to select the procedure(s) the payment is being applied to prior to selecting OK/Post. If you do not specify where the payment should be applied, the payment will not be applied appropriately.

Adjustments

- Enter an Adjustment from the Enter Payment Window
  - Enter Adjustment list: Credit (-)
  - Enter Adjustment box: Allotted adjustment amount
  - Click OK/Post
  - Type list: Select an adjustment type
  - Note box: Add any applicable notes into the notes field
  - Click OK/Post to post the insurance payment and corresponding adjustment
  - Click the Close button (X icon) to close the Primary Dental Insurance Claim window

- Post an Additional Approved Adjustment
  - Dentrix Ledger Transaction menu: Enter Adjustment
  - Select Adjustment Type dialog box: Select Credit (-) or Charge (+)
  - Click OK
  - Amount box: Adjustment amount
  - Type list: Select Type of adjustment
  - Double – click the cell in the applied column of desired procedure
  - Applied Amount box: Amount desired for adjustment for each or one procedure
  - Click the check mark button
  - Note box: Add in any applicable notes into the field
  - Click OK/Post

Enter and Adjustment

# Additional Approved Adjustment

Generating a Billing Statement

- Generate a Single Billing Statement
  - Click Print Statement to send the statement to Batch Processor (only click once)
  - Click the Office Manager button
  - Description column of the Batch Processor: the patient's Single Billing Statement
  - Click the Print Report button
  - Click OK
  - Click the Close button (X icon) to close the Office Manager

Generating a Billing Statement (2)
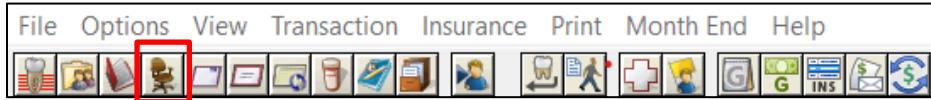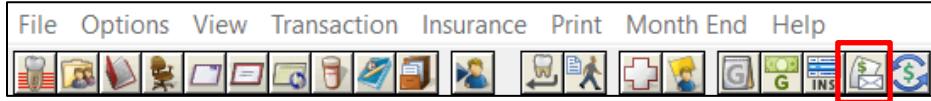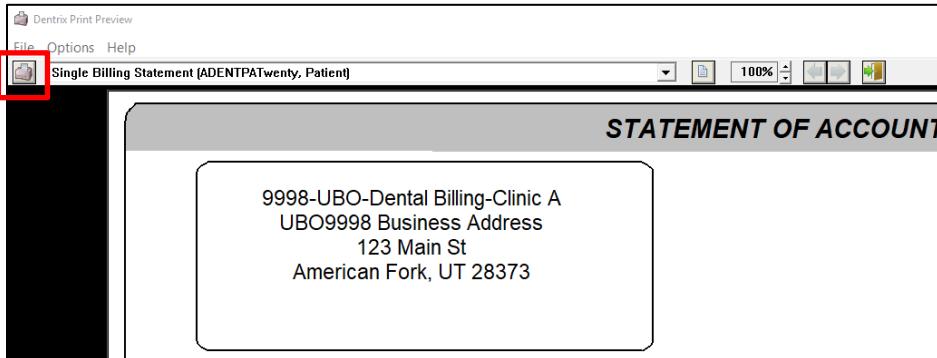
Collections Manager

- Generate the Collections Manager List
  - Click the Collections Manger button from the Dentrix Ledger
  - Select Billing Type list: Select Billing Types (non-active-duty billing types 3-28, active-duty 1&2)
  - List accounts section: by click
  - Click the Clinic section search button (double greater than icon) to select specific clinics
  - Select the rendering clinic or multiple dependent on report use
  - Click OK
  - Minimum Days Past Due section: Select Option
  - Ins Min Days Past Due section: Select Option
  - Select # of Pmts missed section: Select Option
  - Click Show Columns
  - Available Columns list: Add
  - Show these columns in this order list: Remove anything necessary
  - Click OK
  - Click OK
  - Click the Minimize button (minus sign icon) to minimize the Collections Manager

Collections Manager (2)

Collections Manager Report

DxOne Reports

- Dentrix DxOne Reports can be accessed by selecting the DxOne reports button from the menu bar
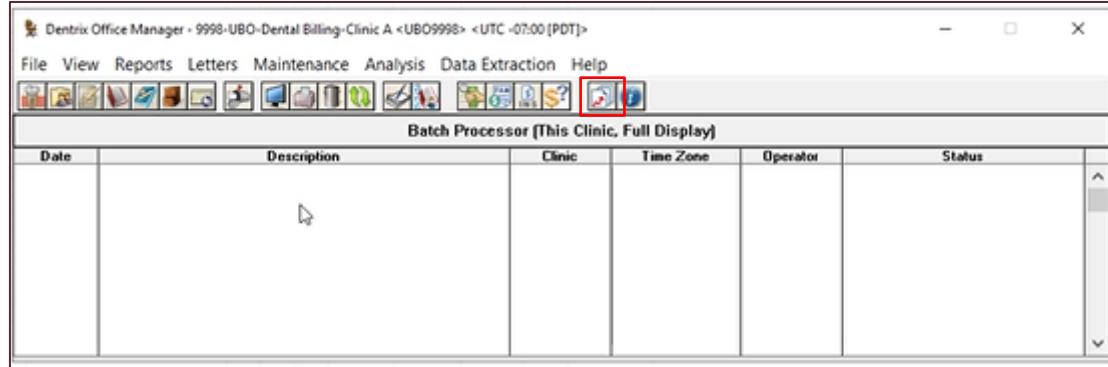
Aging / Credit Report

- Generate Aging/Credit Report
  - Click the DXOne Reports button from the Dentrix Enterprise Ledger
  - Select Report Category: Ledger
  - Double-click Aging/Credit Balance
  - Date Type list box: Entry Date
  - Balance Range list: <Exclude Zero Balances>
  - Click the Clinic pane: Select desired clinics for report
  - Click Add
  - Click OK
  - Billing Type ID dialog box: Select the desired billing types for the report
  - Click Add
  - Click OK
  - Click Print
  - Click the Close button (X icon) to close the Report Preview window
  - Click the Close button (X icon) to close the Aging/Credit Balance dialog box

Dentrix Patient Accounting Reports

- Dentrix Enterprise Report Overview
  - Aging/Credit Balance: Use this report to reconcile accounts receivables, including patient balances, balances for patients with outstanding claims, and errors in posting.
    - ✓ You can also use this report to locate balances over 120 days that need to be sent to collections.
  - Insurance Claim Aging: This report lists all outstanding claims and their respective ages.
  - Day Sheet: Run this report lists to show the total cost of care for individual billing types.
  - Suspended Credits: This report lists all accounts with unapplied credits.
  - Utilization: Use this report to show the full value of services rendered, as well as reduced charges for interagency billing.

- DXOne Reports Overview
  - You can preview reports created from DXOne Reporting, and print them, save them to a file, and export them.
  - They do not go to the Batch Processor.
  - The patient billing type must be verified at check in.
  - Failure to update the billing type for non-DOD active-duty dental patients from the default Type 1 negatively affects all reports.
  - The Save as Default option retains filter selections as a template for future use.
  - You can use the Schedule and Template Only option to create report templates for each provider.
  - Rename the report template to differentiate between providers.

Aging / Credit Report (2)

Insurance Claim Aging Report

- Generate an Insurance Claim Aging Report
  - Select Report Category list: Ledger
  - Double-click Insurance Claim Aging
  - Click the Clinic Search button
  - ID column: Select desired clinics
  - Click Add
  - Click OK
  - Click the Select Bill Type search button
  - ID column: Select desired billing types
  - Click Add
  - Click OK
  - Review the Dental Insurance Claim Aging Report

Aging Report Preview

Day Sheet Report

- Generate a Day Sheet Report
  - Select Report Category list: Management
  - Double-click Day Sheet
  - Date Range section: Relative Date Range or Date Range
  - Relative Date Range list: make a selection from the drop-down or include a date range
  - Date Type: Entry Date
  - Click the Clinic Search button (double greater than icon) to select specific clinics
  - ID column: Select desired clinics
  - Click Add
  - Click OK
  - Clinic list box: Rendering Clinic
  - Provider/Staff dialog box: All
  - ID and Description columns: select desired billing types
  - Group by section: Billing Type
  - Layout Options section: Chart #
  - Click OK
  - Click the Print Report button (printer icon)
  - Click the close button (X icon) to close the Print Preview window

Day Sheet Report (2)

Suspended Credits Report

- Generate a Suspended Credits Report
  - Select Report Category list: Ledger
  - Double-click Suspended Credits
  - Select the report options
  - Click OK
  - Review the report
  - Click the Close button (X icon) to close the Report Preview window
  - Click the Close button (X icon) to close the Suspended Credits dialog box

Suspended Credits Report (2)

Utilization Report

- Generate a Utilization Report
  - Select Report Category list: Ledger
  - Double-click Utilization
  - Date Range from box: ten years prior
  - Click the Select Clinics button (double greater than icon)
  - ID column: Select desired clinics
  - Click Add
  - Click OK
  - Click the Select Billing Type button (double greater than icon)
  - ID column: the 3 Coast Guard TRICARE Dental – 4 Coast Guard TRICARE Family Dental billing types for Coast Guard only
  - Click Add
  - Click OK
  - Click the Fee Schedule button (double greater than icon)
  - Fee Schedule list: IOR – Interagency
  - Click OK
  - Click the Print Report button (printer icon)
  - Review the report
  - Click the Print button
  - Click the Close button (X icon) to close the Report Preview window
  - Click the Close button (X icon) to close the Utilization dialog box
  - Click the Close button (X icon) to close the DXOne Reporting window

Utilization Report (2)

Utilization Report (3)

Dentrix Resources

- [Adoption Central Sharepoint Site](#)
  - [MHS Genesis Workflow Library Link](#)
  - [Knowledge Center Link](#)
- [JKO Training](#)
  - Dental Patient Accounting VILT (MHSG-US601-SUST-EHRu)

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