

DENTRIX[®]

G4

T R A N S I T I O N G U I D E

W E L C O M E

Dear Doctor,

Inspiration is what drives us to do incredible things. Inspiration is what drove people like Michelangelo to paint the Sistine Chapel and Thomas Edison to invent the light bulb. Inspiration led Ludwig van Beethoven to write his 5th Symphony and Stephen Hawking to explain Quantum Physics. Just as these revolutionary thinkers were inspired to bring something great into the world, Henry Schein Practice Solutions sought inspiration, and found it in you, our valued customer. With more than 170 user requests built into DENTRIX G4, you'll be inspired by enhancements such as:

- Downloadable updates
- Practice Analysis and Production Summary reports by procedure code range
- Print Appointment Reminder labels from Fast Checkout
- Edit insurance benefits and deductibles met outside of an insurance claim
- Enhanced user interface in the Treatment Presenter and Guru patient education
- Easy access to the DENTRIX Support Knowledge Base

Another exciting new enhancement in DENTRIX G4 is the ability to register your software electronically. During the G4 installation process you will be prompted to enter your unique activation code located inside the flap of the outer G4 shipping box. After entering your code your software will be automatically registered, allowing us to better serve you with support issues and DENTRIX updates.

For a full, detailed list of enhancements, please refer to the Transition Guide inside this book.

With these and many other user-inspired enhancements and improvements, we know you'll be delighted as G4 improves your practice! Please don't hesitate to call 1-800-DENTRIX if you have any questions about your new G4 software!

We wish you and your practice much success.

Sincerely,



Kevin Bunker

VICE PRESIDENT & GENERAL MANAGER
HENRY SCHEIN PRACTICE SOLUTIONS

TABLE OF CONTENTS

DENTRIX G4 New Features	7
Additional G4 New Features	11
Registration/Activation	14
Check for Updates/Smart Upgrades	16
Patient Alerts	18
General Option Preferences	20
Billing Statements	22
Unscheduled Treatment Plans	24
Insurance Information	26
Procedure Buttons Setup	28
Presenter Player Toolbar	30
Perio Data Entry Panel	32
Split Payment	34
Batch Insurance Payments	36
Direct Processing Options Setup	38
Fast Checkout Options Setup	40
Search Payments	42

The DENTRIX G4 release contains several enhancements and new features. Some of these new features and enhancements may affect the work routines you are currently using. To help you make a smooth transition from DENTRIX G3 to DENTRIX G4 and get your office up and running faster, this Transition Guide illustrates, describes, and compares existing DENTRIX G3 features to the new features in DENTRIX G4.

The DENTRIX G4 Transition Guide includes a detailed new features list. It includes thirteen comparisons that provide visual representations and text explanations of the way features have changed from DENTRIX G3 to DENTRIX G4. It also includes a detailed explanation of two of the important, complex new features.

For more information about the features listed in this guide, refer to the DENTRIX G4 User's Guide (available for download at www.dentrix.com).

DENTRIX G4 contains several major enhancements and new features. The following enhancements and new features are illustrated and described in more detail in this guide:

- **Registration/Activation:** Registration/activation is required with dentrix G4. Registering/activating your software allows the Check for Updates feature to know which version of the software you are using to provide you with key software updates. Registration/activation also allows HSPS Customer Support Representatives to know which version of dentrix you are using in order to provide better service when answering your questions. (page 14)
- **Check for Updates:** Check for Updates allows you to install the most current version of DENTRIX without having to manually download or use a DVD. From the Quick Launch, you can use the Check for Updates feature to compare your DENTRIX software to the most recent version available on the DENTRIX website and check for updates that need to be installed on your system. Once you have checked for updates, you can select to install the available updates to keep your system up to date. (page 16)

- **Smart Upgrades:** With DENTRIX G4, you only need to install updates on one computer on the network. If an update is installed on any computer (server or workstation) all other computers on the network display a message saying that an update is available. Depending on the nature of the update, some updates will be required to be installed and some will be optional. (page 16)
- **Family Alerts:** You can apply patient alerts to a patient's family members so that you only have to create one alert instead of several alerts. You can save time by using custom alert note templates to enter alert notes, and you can track when alert notes were added by inserting a dateline. And, with DENTRIX G4, there is no limit to the number of patient or family alerts you can create for each patient. (page 18)
- **Default Payment Allocation:** You can set a default payment allocation to either the guarantor's provider or a split payment option (e.g. split payment percentage, split payment FIFO, split payment guarantor/account estimate, or split payment equal payments), so you don't have to select a split payment method every time you split a payment. (page 21)
- **Default Signature on File:** You can store a default signature on file for all new subscribers for both the release of information and assignment of benefits in dental and/or medical insurance so that you don't have to check the check box for those signatures for each subscriber. (page 21)
- **Billing Statements:** When setting up billing statements, you can specify whether you want to send the statement to batch, print the statement, or send the statement electronically. (page 22)

- **Unscheduled Treatment Plan Report:** You can generate the Unscheduled Treatment Plan report based on patient status or treatment plan amount to narrow the results of the report. You can also exclude continuing care procedures from the report to view just treatment plan procedures. (page 24)
- **Insurance Information:** You can edit deductibles from the Insurance Information dialog. And, you can set the default patient insurance claim information from the Insurance Information dialog in the Family File in addition to the Appointment Book. (page 26)
- **Procedure Button Sets:** You can create and manage custom procedure button sets that can be selected on any computer on the network, allowing you to select and use your preferred procedure buttons on any computer on the network without having to recreate the buttons on each computer. (page 28)
- **Treatment Plan Presenter Player:** Since the same player is used in all parts of the Presenter, you can use the slider bar, thumbnail tray, color tool, text tool, and undo function with both DENTRIX information and Guru patient education topics. (page 30)
- **Perio Data Entry Buttons:** You can return to the first site on the first tooth when entering Perio measurements and delete incorrect measurements using the new Perio data entry buttons. You can also open the Furcation Grade dialog from which you can enter furcation grades for all surfaces of the tooth at once by clicking a button in the Data Entry panel. (page 32)

- **Split Payment:** You can split payments within the Enter Payments dialog without having to open the Split Payments dialog. (page 34)
- **Fast Checkout Options:** You can specify if you want to send claims electronically and if you want to print an appointment reminder label when you use the Fast Checkout option. (page 40)
- **Batch Insurance Payment:** In the Batch Insurance Payment Entry dialog, you can split claims with multiple procedures into multiple claims, and you can search for pending claims by patient. (page 36)
- **Direct Processing Options:** In addition to batch and print, you can set insurance claims to be sent electronically by default, and you can specify if you want to receive a real-time notice when you submit real-time electronic claims. (page 38)
- **Search Payments:** In the Ledger, you can search for specific payments by check number, amount, date, insurance carrier, or guarantor, and you can print a report of the results. (page 42)

A D D I T I O N A L N E W F E A T U R E S

The following enhancements and new features are included in the DENTRIX G4 release, but are not illustrated in this guide:

- **View/Hide Expired Alerts:** Expired alerts are hidden by default in the Patient Alerts dialog. If you want to view all alerts (both current and expired) for a patient, you can check the option to view expired alerts in the Patient Alerts dialog. Otherwise, the Patient Alerts dialog only displays current patient alerts so that you know exactly what the patients' needs are at that time.
- **Sort Adjustments:** You can sort the adjustment types in the Enter Adjustments dialog by credit/debit or adjustment name to make it easier to find the adjustment you want.
- **Referral ID Number Type:** In addition to the License Number, UPIN, and Social Security Number, you can enter an NPI number or Federal Tax ID as the referral ID number.
- **Second Claim ID Number:** You can enter a second claim ID number in the Insurance Claim Information dialog on the Medical tab.
- **Ledger + History:** If you are viewing the Ledger with History, the view setting is saved when you close the Ledger and the module will open in that view the next time you access it.

- **Claim Statuses in Ledger:** To help you see the status of your insurance claims at a glance in the Transaction Log in the Ledger, one of four new, descriptive claim statuses are listed next to insurance claims: Created, Batched, Printed, or eSent. The existing status of Received is also displayed along with the new claim statuses.
- **Production Summary Report:** You can use the Production Summary to see your office's production based on specific procedures by using the new filter to run the report by procedure code range.
- **Deposit Slip:** You can combine family payments on the Deposit Slip to save time during end-of-day reconciliation.
- **Insurance Claims to Process Report:** You can include rejected claims along with the Created claims on the Insurance Claims to Process Report (formerly the Insurance Claims not Sent report) so that all claims are displayed on the report.
- **Route Slip:** Archived patients are not listed on the family Route Slip; only patients with an active, inactive, or non-patient status are displayed on the Route Slip.
- **Consent Forms:** You can exclude procedure codes from consent forms if the forms do not require procedure codes. And, all consent forms are viewable in both the Treatment Planner and the Document Center.
- **Perio Display Theme:** By default, the display theme in the Perio Chart is the new Blue Haven Contrast theme, which makes it easier to read perio measurements in the Data Chart.

- **Global Settings:** Customization settings in the Patient Chart, Treatment Planner, and Perio Chart that used to be workstation-specific (e.g. Patient Chart display themes, Perio Chart display themes, Patient Chart layouts, Treatment Case Report settings, Perio display setup settings, Case Presentation Outline Setup) are now global settings that you can set up once and select on any computer on the network.
- **Password Setup:** The names of several password rights have been changed and are now more descriptive of the password function, so it is easier for you to assign appropriate password rights to the correct individuals.
- **Help Menu:** You can access several important pages on the DENTRIX website through the Help menu in every module. The Help menu includes links to the Support Knowledgebase, the On-demand Training page, and the Enhancement Request form.

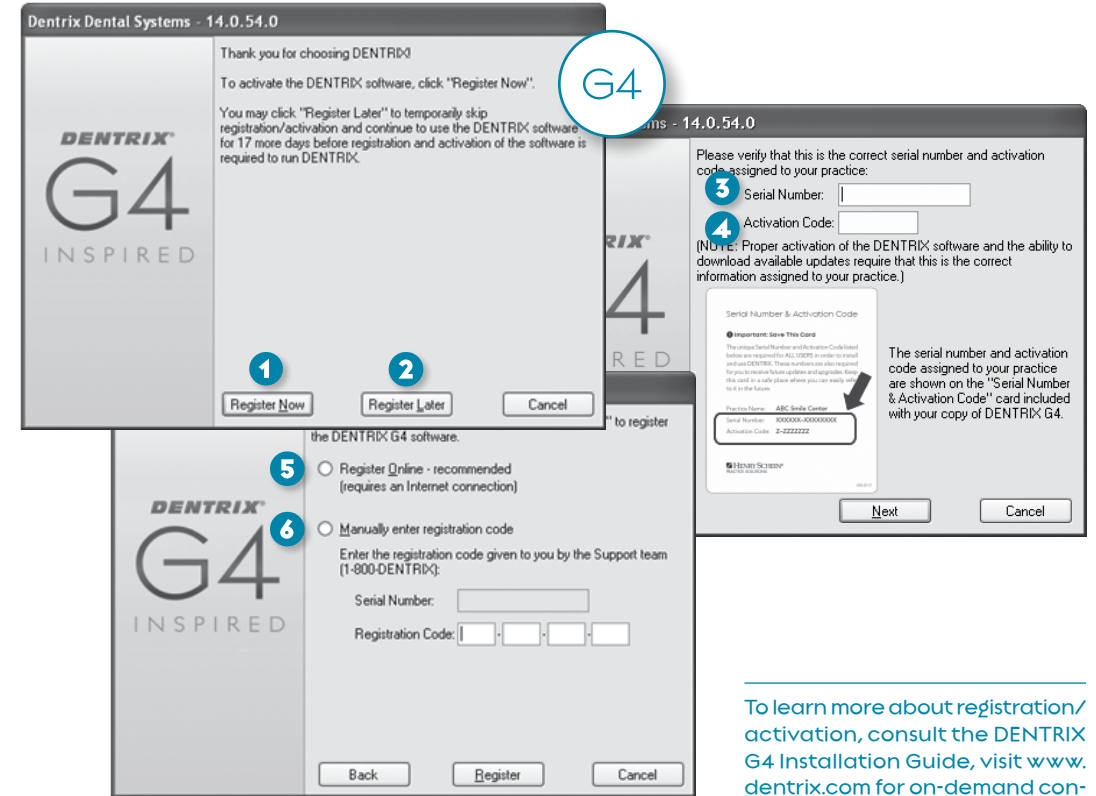
Registration/Activation

Registration/activation is required for DENTRIX G4. Registering/activating DENTRIX G4 allows you to receive version-specific communication and upgrades from Henry Schein Practice Solutions. You can register/activate DENTRIX at the time of installation, or you can delay registration/activation for up to 30 days after the installation. After 30 days, you cannot access DENTRIX without registering/activating your software.

- 1 Click to begin the registration/activation process.
- 2 Click to ignore the registration/activation and close the dialog, so you can access DENTRIX without registering/activating your software. You will be prompted to register once a day until you register your DENTRIX software.
- 3 Verify that the serial number in this field is the serial number assigned to your office. You can find the serial number assigned to your office on the card that was included on the inside flap of the shipping box in which you received DENTRIX G4.

- 4 Enter the activation code assigned to your office. You can find the activation code assigned to your office on the card that was included on the inside flap of the shipping box in which you received DENTRIX G4.
- 5 Mark to send your serial number, activation code, and practice information to HSPS via the Internet and have your software automatically registered/activated.
- 6 If you do not have an Internet connection, mark to manually enter the registration code you received when you called DENTRIX Support at 1-800-DENTRIX.

● = Existing Feature ● = New feature in DENTRIX G4

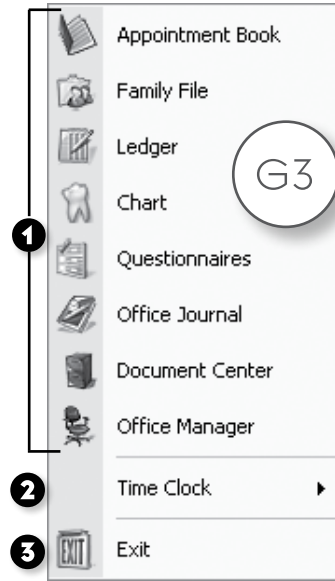


To learn more about registration/activation, consult the DENTRIX G4 Installation Guide, visit www.dentrix.com for on-demand content, or call 1-800-DENTRIX to speak to a Customer Service Representative.

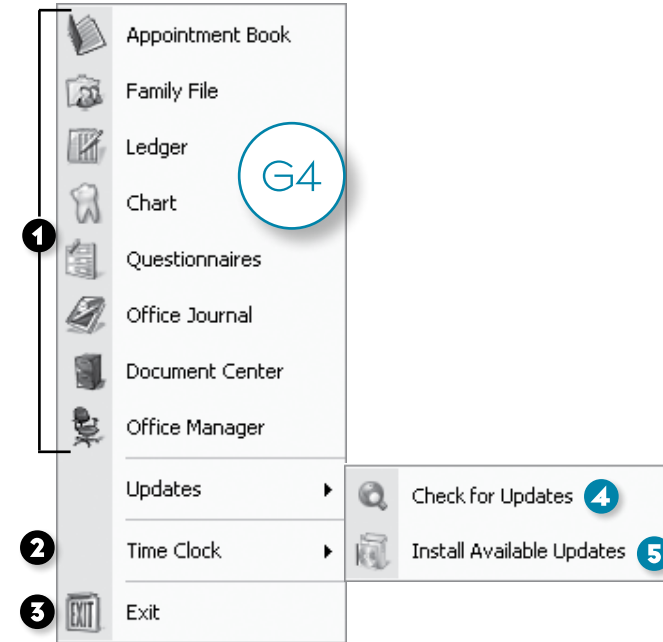
Check for Updates/Smart Upgrades

The Quick Launch menu that existed in DENTRIX G3 still exists in DENTRIX G4, but includes a new option to compare your DENTRIX software to the most recent version available on the DENTRIX website and check for updates that need to be installed on your system. The images compare the Quick Launch menu in both versions of DENTRIX, and the text describes the features of each menu.

- 1 Select a DENTRIX module name to open that module.
- 2 Select to expand the Time Clock menu, set up the time clock, or clock an employee in or out.
- 3 Select to exit and close the Quick Launch, so it is no longer displayed in your System Tray.
- 4 Select to have the system compare your DENTRIX software to the most recent version available on the DENTRIX website and check for updates.



● = Existing Feature ● = New feature in DENTRIX G4



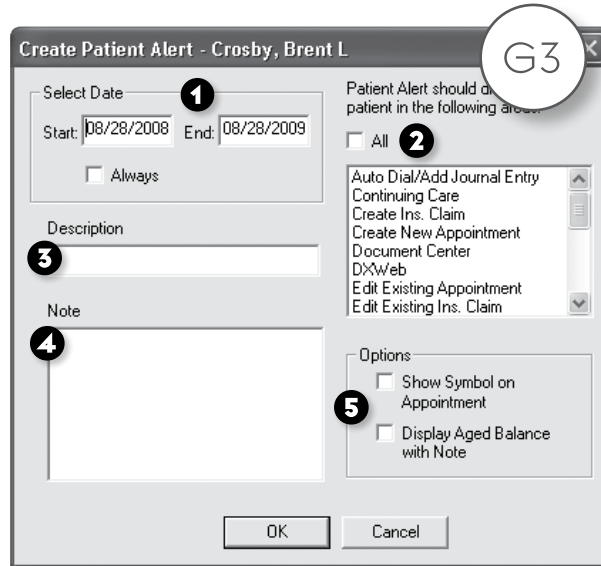
- 5 Click to install any available updates on the current workstation or server. When you have installed updates on one computer on the network, the next time you open DENTRIX on another computer on the network, the Smart Upgrades feature will check the other computers on the network to see if the updates have been installed. If updates have been installed on any other computer on the network, a notification that lists the updates appears. You can install the updates from this notification dialog. You must install the required updates if they have been installed on another computer on the network.

To learn more about the Check for Updates feature, consult the Other Features chapter of the DENTRIX G4 User's Guide, call 1.800.336.8749 to schedule office training with a certified trainer, or visit www.dentrix.com for other training options and on-demand content.

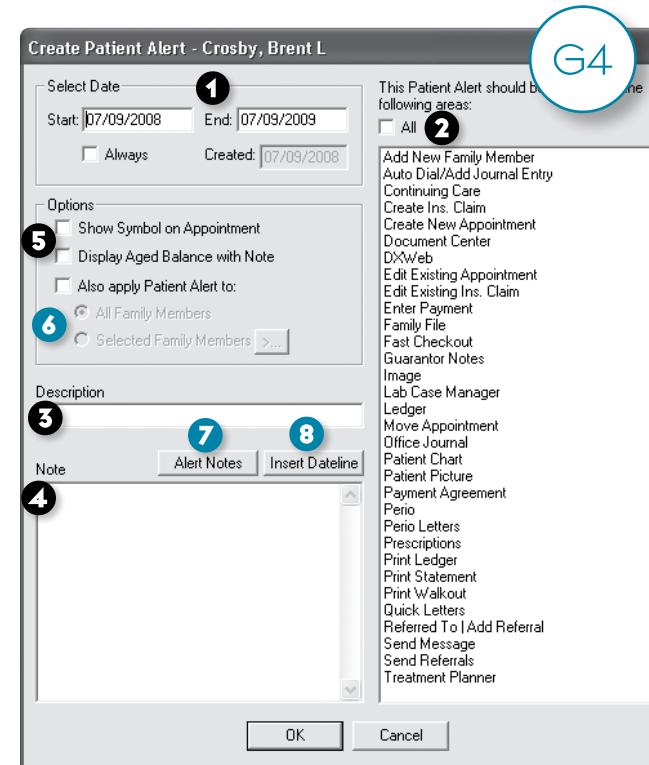
Patient Alerts

The Create Patient Alert dialog that existed in DENTRIX G3 still exists in DENTRIX G4, but three additional options have been added to save your office time. The images compare the Create Patient Alert dialog in both versions of DENTRIX, and the text describes the features of each dialog.

- 1 Set a start and end date for time-sensitive patient alerts so out-of-date alerts are not displayed.
- 2 Select which places in DENTRIX to display the alert, so the alert is only displayed in the modules it affects.
- 3 Enter a description of the alert that will appear on the alert pop-up.
- 4 Enter a note containing information about the alert to help you keep track of the circumstances and details surrounding the alert.



● = Existing Feature ● = New feature in DENTRIX G4



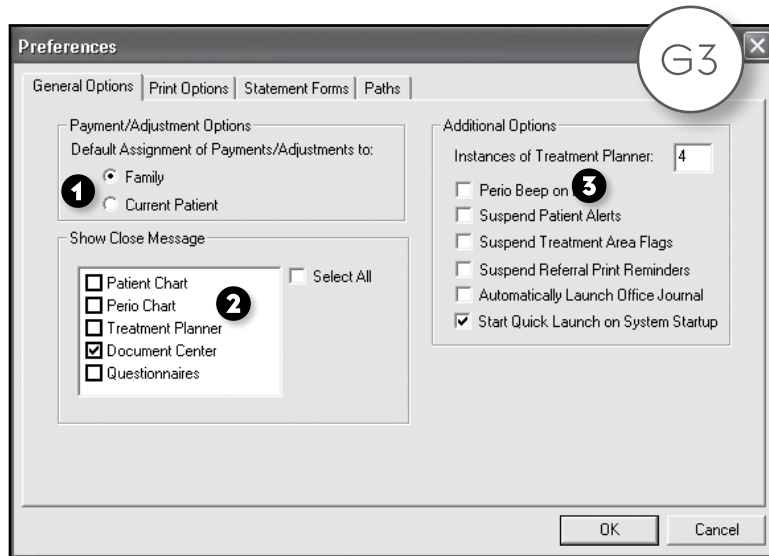
- 5 Check if you want to show an alert symbol on the appointments of patients who have patient alerts and/or display the account's aged balance with the alert note.
- 6 Mark if you want to apply the patient alert to some or all of the patient's family members, so you can use the same alert for family members instead of creating several duplicate alerts.
- 7 Select pre-defined alert notes from the list instead of typing notes each time you create common alerts.
- 8 Insert a dateline in the alert note so you can see when each alert note was written in case you have several different alert notes.

To learn more about patient alerts, consult the Other Features chapter of the DENTRIX G4 User's Guide, call 1.800.336.8749 to schedule office training with a certified trainer, or visit www.dentrix.com for other training options and on-demand content.

General Options Preferences

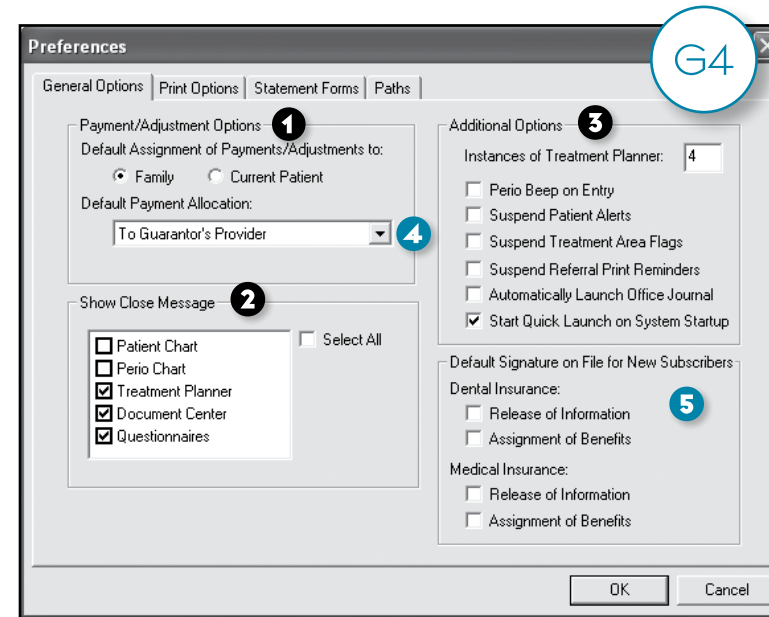
The General Options tab in the Preferences dialog that existed in the DENTRIX G3 Office Manager still exists in DENTRIX G4, but two features have been added. The images compare the General Options tab in both versions of DENTRIX, and the text describes the features of each dialog.

- 1 Mark to assign payments and adjustments, by default, to either the Family or the Current Patient.
- 2 Check the modules for which you want the Close Message to appear when closing that module.



● = Existing Feature ● = Feature new to DENTRIX G4

- 3 Check any additional preferences you want to set for your DENTRIX system.
- 4 Expand the drop-down to select a default for payment allocation, so you don't have to select a split payment method every time you split a payment.
- 5 Check to have the corresponding check boxes checked by default, for new subscribers, in the Insurance Information dialog in the Family File, so you don't have to check the options each time you enter a default signature on file.



To learn more about payment allocations and signature on file options, consult the Ledger chapter and Family File chapter (respectively) of the DENTRIX G4 User's Guide, call 1.800.336.8749 to schedule office training with a certified trainer, or visit www.dentrix.com for other training options and on-demand content.

Billing Statements

The Billing Statements report filters that existed in the DENTRIX G3 Office Manager still exist in DENTRIX G4, but one additional feature has been added. The images compare the Billing Statements dialog in both versions of DENTRIX, and the text describes the features of each dialog.

- 1 Select a range of guarantors for your search criteria, so only the desired guarantors are included in the statement.
- 2 Select a range of primary providers for your search criteria, so only the desired providers are included in the statement.
- 3 Select a range of billing types for your search criteria, so only the desired billing types are included in the statement.
- 4 Check the search criteria you want to use to make sure the desired information is included on the billing statement.

● = Existing Feature ● = Feature new to DENTRIX G4

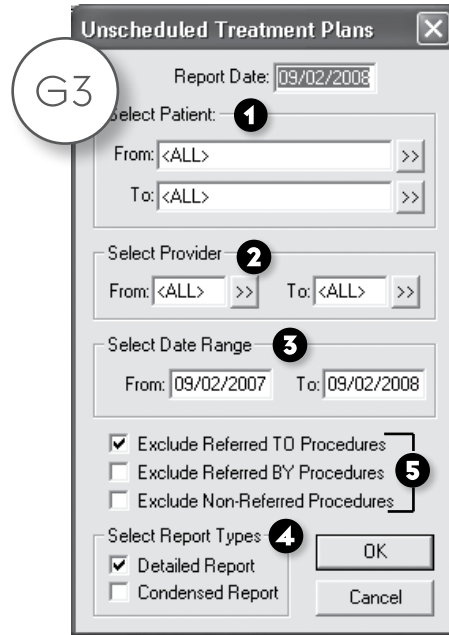
- 5 Mark to sort transactions by Patient Name or Date on the billing report.
- 6 Check the report types you want to generate. You can generate both billing statements and mailing labels at the same time.
- 7 Edit the default statement message as desired if you want to include a message on all the billing statements.
- 8 Mark to send billing statements to the Batch Processor, the printer, or to send the statements electronically. (You can only send statements electronically if you have set up QuickBill.)

To learn more about generating billing statements, consult the Other Features chapter of the DENTRIX G4 User's Guide, call 1.800.336.8749 to schedule office training with a certified trainer, or visit www.dentrix.com for other training options and on-demand content.

Unscheduled Treatment Plans

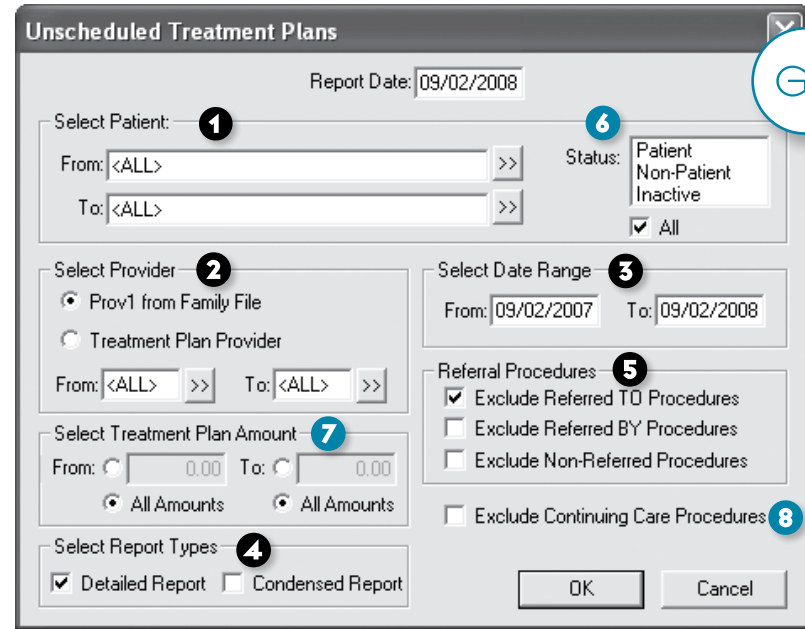
The Unscheduled Treatment Plans dialog that existed in DENTRIX G3 still exists in the DENTRIX G4 Office Manager but has been enhanced with the ability to search by non-patients and inactive patients. The images compare the Unscheduled Treatment Plans dialog in both versions of DENTRIX, and the text describes each feature.

- 1 Select the patient or patient range by which you want to run the report.
- 2 Select the provider or range of providers whose patients you want to include on the report. In DENTRIX G4, you can select to run the report by a patient's Family File or treatment plan provider.
- 3 Enter a date range by which you want to run the report to narrow the results of the report.
- 4 Check to generate a detailed and/or condensed report.
- 5 Check to exclude referred procedures from the report.



● = Existing Feature ● = New feature in DENTRIX G4

- 6 Select one or more statuses to include only patients with those status(es) on the report.
- 7 Select a treatment plan amount or an amount range by which you want to run the report.
- 8 Check to exclude continuing care procedures from the report.

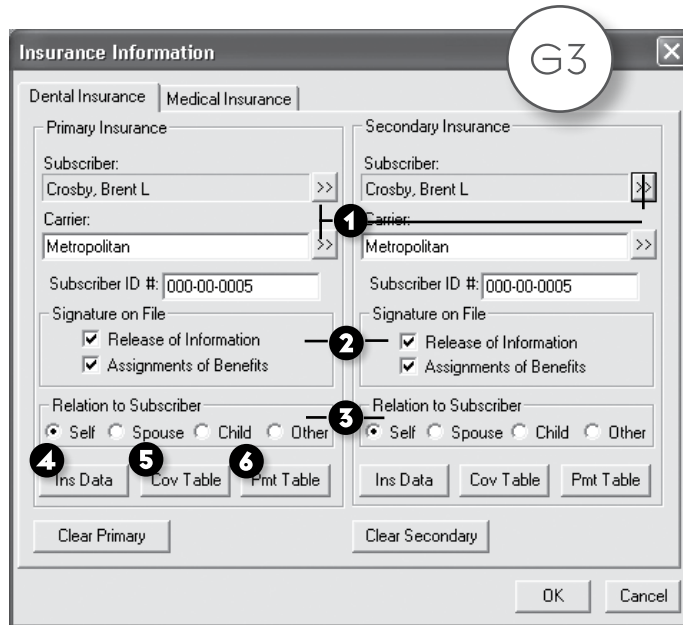


To learn more about generating the unscheduled treatment plans report, consult the Office Manager chapter of the DENTRIX G4 User's Guide, call 1.800.336.8749 to schedule office training with a certified trainer, or visit www.dentrix.com for other training options and on-demand content.

Insurance Information

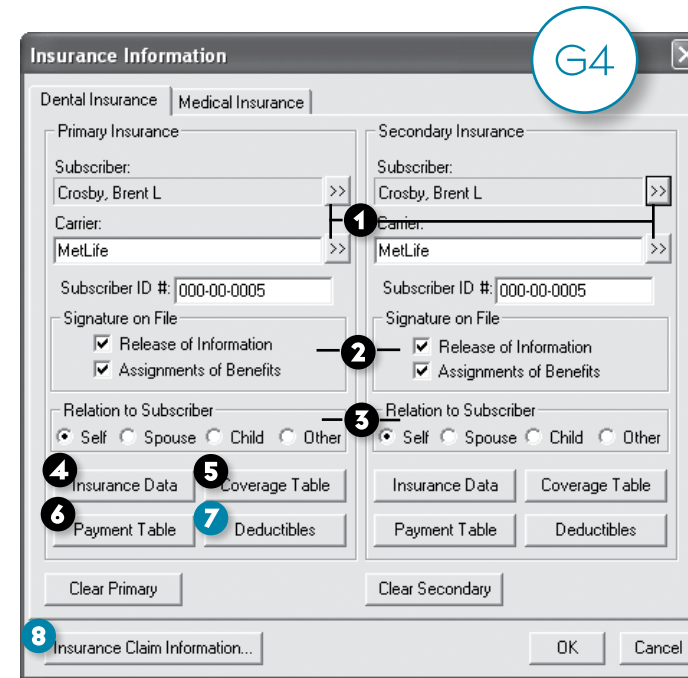
The Insurance Information dialog that existed in DENTRIX G3 still exists in the DENTRIX G4 Family File but has been enhanced with several new features. The images compare the Insurance Information dialog in both versions of DENTRIX, and the text describes each feature.

- 1 Click the search buttons to select a subscriber and carrier.
- 2 Check to release the patient's information and assign benefits.
- 3 Mark the relationship of the patient to the subscriber.



● = Existing Feature ● = New feature in DENTRIX G4

- 4 Click to edit the insurance information.
- 5 Click to set coverage tables for the insurance plan.
- 6 Click to add or edit insurance payment tables.
- 7 Click to edit deductibles met/benefits used for the selected insurance plan.
- 8 Click to set the default insurance claim information (e.g. student status or disability status) for the selected patient.

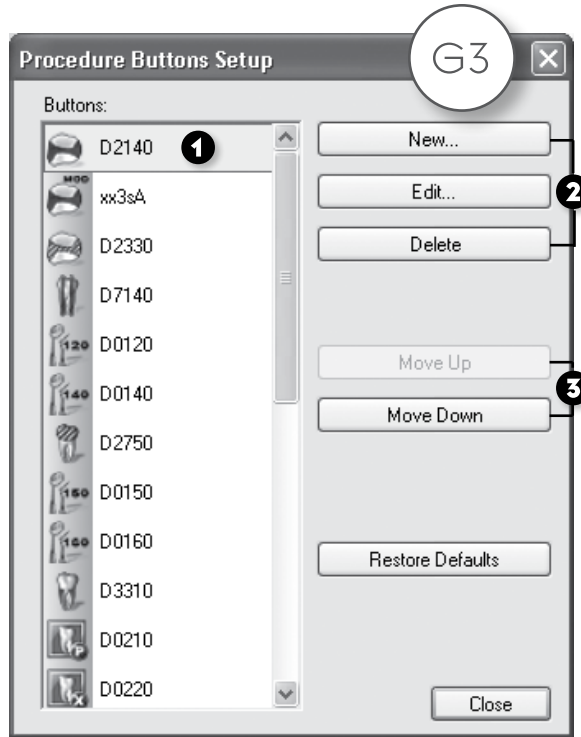


To learn more about setting up insurance information, consult the Family File chapter of the DENTRIX G4 User's Guide, call 1.800.336.8749 to schedule office training with a certified trainer, or visit www.dentrix.com for other training options and on-demand content.

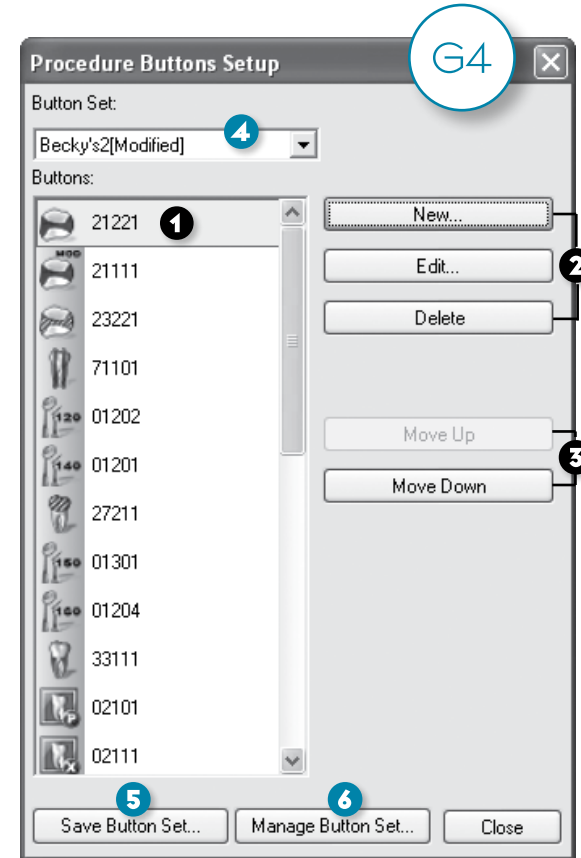
Procedure Buttons Setup

The Procedure Buttons Setup dialog that existed in DENTRIX G3 still exists in the DENTRIX G4 Patient Chart but has been enhanced so users can save their customized procedure buttons set. The images compare the Procedure Buttons Setup dialog in both versions of DENTRIX, and the text describes each feature.

- 1 View a list of available procedure buttons.
- 2 Click to create a new procedure button. Or, click to edit or delete the highlighted procedure button.
- 3 Click to move the procedure button up or down in the list, so buttons appear in the procedure buttons panel in the order that is most convenient for you.



● = Existing Feature ● = New feature in DENTRIX G4



- 4 Expand the drop-down to select a procedure button set to use on the current workstation.
- 5 Click to save the current procedure button set as a custom set and make the set available for use on any other workstation.
- 6 Click to delete or edit the existing procedure button sets, so only the current, useful procedure button sets are listed.

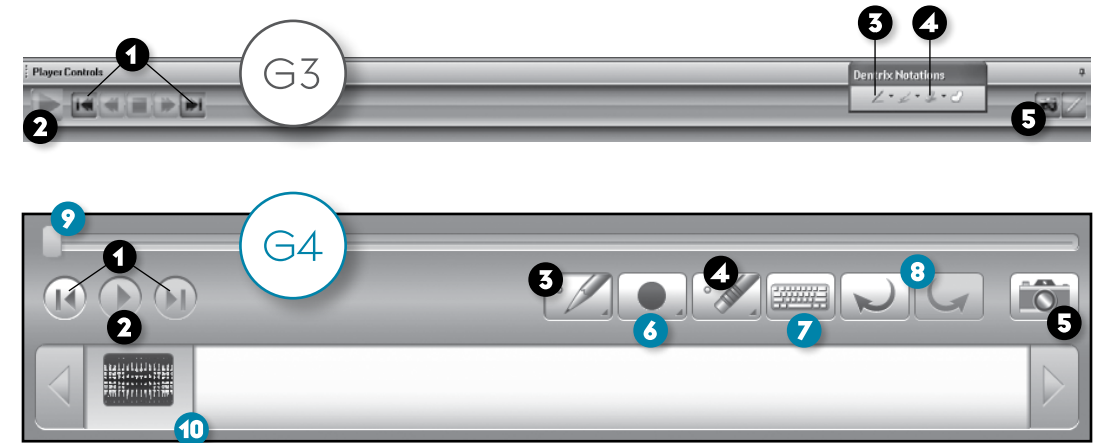
To learn more about procedure button sets, consult the Patient Chart chapter of the DENTRIX G4 User's Guide, call 1.800.336.8749 to schedule office training with a certified trainer, or visit www.dentrix.com for other training options and on-demand content.

Presenter Player Toolbar

The player toolbar in the Presenter that existed in DENTRIX G3 still exists in DENTRIX G4 but has been enhanced to include the features of the GURU player. The images compare the Presenter player toolbar in both versions of DENTRIX, and the text describes each feature.

- ❶ Click to move to the next or previous slide in the presentation.
- ❷ Click to play the animation.
- ❸ Click to select the weight of the pen tool to make your notations appear the way you want on the screen.
- ❹ Click to erase notations in the presentation, so irrelevant notations are not displayed on the screen.
- ❺ Click to take a snapshot of the current screen and make it available for you to display with those notations at a later point during the presentation.
- ❻ Click to change the color of your notation tool to make your notations appear the way you want on the screen.
- ❼ Click to type notation text to ensure that notations are clear and easy to read.
- ❽ Click to undo or redo a notation.
- ❾ Click and drag to move the animation forward or backward if you want to skip to relevant segments of the animation during the presentation.
- ❿ Click a thumbnail to open slides of which you took snapshots or on which created notations, so you can return to that slide with the notations just as you left them.

● = Existing Feature ● = Feature new to DENTRIX G4

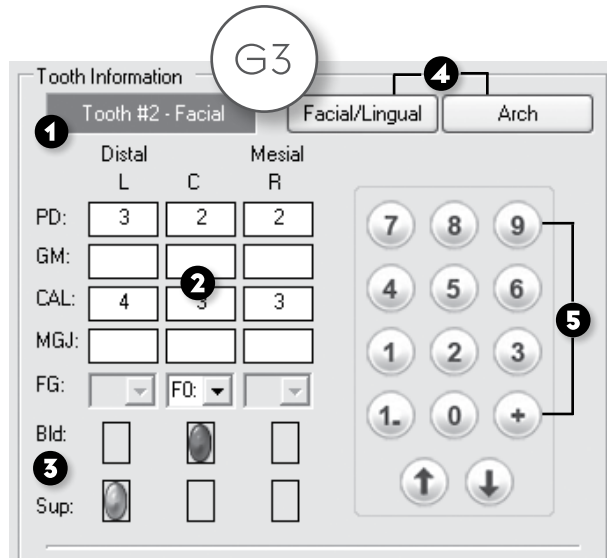


To learn more about the Presenter player toolbar, consult the Presenter chapter of the DENTRIX G4 User's Guide, call 1.800.336.8749 to schedule office training with a certified trainer, or visit www.dentrix.com for other training options and on-demand content.

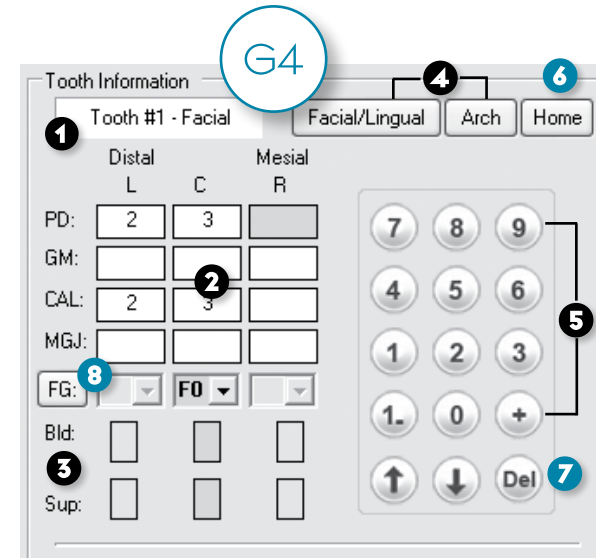
Perio Data Entry Panel

The on-screen buttons that existed in the DENTRIX G3 Perio Chart Data Entry panel still exist in DENTRIX G4, but three additional Data Entry buttons have been added to enhance Perio entry. The images compare the Perio Data Entry panels in both versions of DENTRIX, and the text describes the features of each panel.

- 1 View the number of the selected tooth and surface for which you are entering measurements.
- 2 Enter probing depths, gingival margins, clinical attachment levels, mucogingival junction measurements, furcation grades, and bleeding and suppuration points for the left, center, and right sides of the selected tooth.
- 3 Click the 'Bld' or 'Sup' box to indicate a bleeding or suppuration point on the tooth. A red or yellow oval that corresponds to the selected tooth and site appears.



● = Existing Feature ● = New feature in DENTRIX G4



- 4 Click the Facial/Lingual button to switch to the opposite surface and the Arch button to switch to the upper or lower arch.
- 5 Click to enter measurements in the Perio Chart with a mouse.
- 6 Click to go to the first entry point on the script, so you don't have to move to that point manually.
- 7 Click to delete a measurement without pushing the Delete key on the keyboard.
- 8 Click to open the Furcation Grade dialog to enter all applicable furcation information for the tooth from one dialog.

To learn more about entering perio measurements, consult the Perio chapter of the DENTRIX G4 User's Guide, call 1.800.336.8749 to schedule office training with a certified trainer, or visit www.dentrix.com for other training options and on-demand content.

Split Payment

The split payment feature in the Enter Payments dialog that existed in the DENTRIX G3 Ledger still exists in DENTRIX G4, but has become more accessible when entering payments. The images compare the Enter Payments dialog in both versions of DENTRIX, and the text describes each feature.

- 1 Enter the Date, Amount, Check #, and Bank/Branch # in the corresponding fields.
- 2 Highlight the type of payment.
- 3 Select the provider to whom you want to apply the entire payment.

● = Existing Feature ● = New feature in DENTRIX G4

- 4 Expand the drop-down to apply the payment to a patient or the entire family.
- 5 Enter a note for the payment if you want to document additional information about the payment.
- 6 Click to view the Split Payment dialog to split a payment manually or view split payment amounts.
- 7 Mark the radio button and expand the drop-down to select the method by which you want to split the payment.

To learn more about splitting payments, consult the Ledger chapter of the DENTRIX G4 User's Guide, call 1.800.336.8749 to schedule office training with a certified trainer, or visit www.dentrix.com for other training options and on-demand content.

Batch Insurance Payments

The Batch Insurance Payment Entry dialog that existed in DENTRIX G3 still exists in the DENTRIX G4 Ledger but has been enhanced to include the ability to search by patient and to split insurance claims. The images compare the Batch Insurance Payment Entry dialog in both versions of DENTRIX, and the text describes each feature.

1 Enter the date, amount, check number, or bank/branch number of the claim payment.

- 2** Select to search for the pending claims by dental or medical insurance.
- 3** Click to select the insurance carrier from which you received the payment.
- 4** All pending claims for the selected insurance carrier appear in this list box.
- 5** Once a payment is entered for a pending claim, it appears in this list box.

● = Existing Feature ● = New feature in DENTRIX G4

6 Click to split claims with multiple procedures into multiple claims, so any procedures not included in the payment remain as pending.

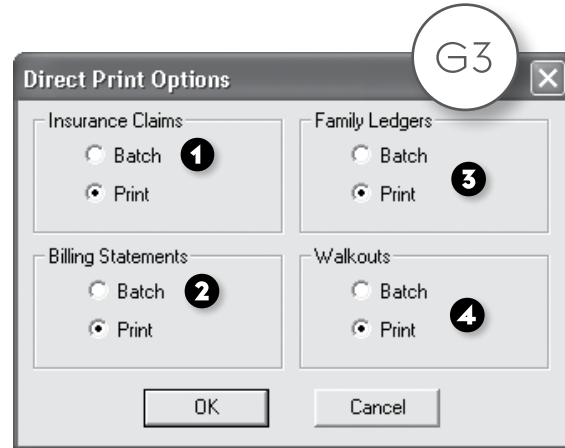
7 Click to select the patient for whom you want to open any pending claims.

To learn more about insurance payments and other features, consult the Ledger chapter of the DENTRIX G4 User's Guide, call 1.800.336.8749 to schedule office training with a certified trainer, or visit www.dentrix.com for other training options and on-demand content.

Direct Processing Options Setup

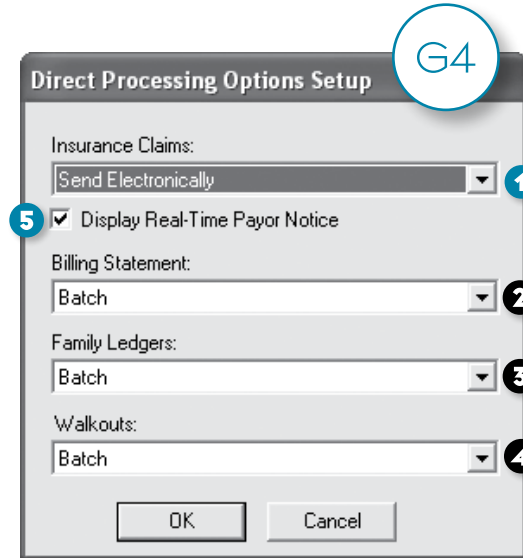
The Direct Print Options dialog that existed in the DENTRIX G3 Ledger still exists in DENTRIX G4 but has been reorganized and renamed to the Direct Processing Options Setup dialog. The images compare the Direct Print Options dialog to the Direct Processing Options Setup dialog, and the text describes each feature.

- 1 Select the default method by which you want to send insurance claims when claims are created, so you don't have to select the method each time you create a claim with the Ins. Today's Proc. or Ins. Selected Proc. button. In DENTRIX G4, you can also select to send insurance claims electronically and real-time electronically, in addition to batch and print.



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- 2 Select the method by which you want to send billing statements, so you don't have to select the method each time you create a billing statement using the Process Billing Statement button.
- 3 Select the method by which you want to send family ledgers when you create a family ledger report using the Print Family Ledger button.
- 4 Select the method by which you want to send walkout statements when you create walkout statements using the Print Walkout button.
- 5 Check if you want to have a payor notice message appear by default when you send a claim real-time electronically.

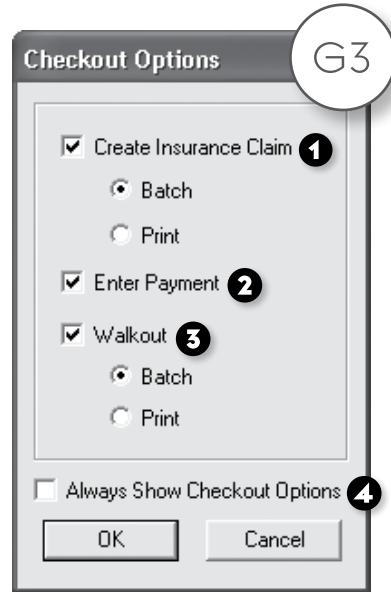


To learn more about creating insurance claims, billing statements, family ledgers, and walkout statements, consult the Other Features chapter of the DENTRIX G4 User's Guide, call 1.800.336.8749 to schedule office training with a certified trainer, or visit www.dentrix.com for other training options and on-demand content.

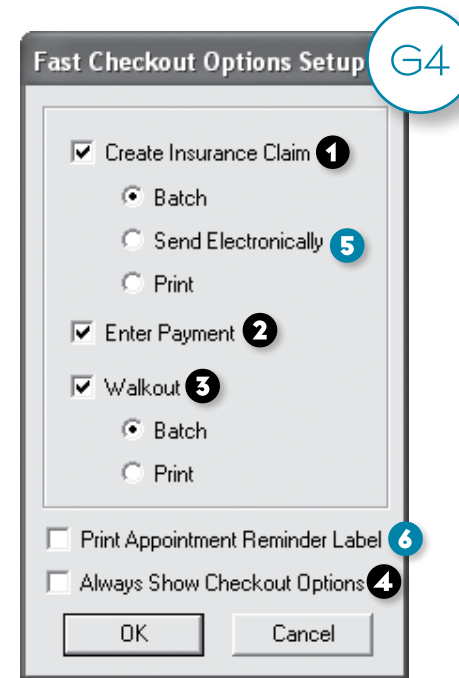
Fast Checkout Options Setup

The Checkout Options dialog that existed in the DENTRIX G3 Ledger still exists in DENTRIX G4 but has been renamed to the Fast Checkout Options Setup dialog and has additional settings. The images compare the Checkout Options dialog to the Fast Checkout Options Setup dialog, and the text describes each feature.

- 1 Check to create an insurance claim when you click the Fast Checkout button, so you don't have to create a claim manually.
- 2 Check to enter a payment when you click a Fast Checkout option, so you don't have to enter a payment manually.
- 3 Check to create a walkout statement when you click the Fast Checkout button, so you don't have to create a walkout statement manually.
- 4 Check to always show this dialog when you click the Fast Checkout button if you want to specify which options you want to use each time you click the Fast Checkout button.



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- 5 Mark to send the insurance claim electronically when you click the Fast Checkout button, so you don't have to send the insurance claim manually. (You can only send the statement electronically if you have set up eServices.)
- 6 Check to print an appointment reminder label when you click the Fast Checkout button.

To learn more about using the Fast Checkout options and other features, consult the Other Features chapter of the DENTRIX G4 User's Guide, call 1.800.336.8749 to schedule office training with a certified trainer, or visit www.dentrix.com for other training options and on-demand content.

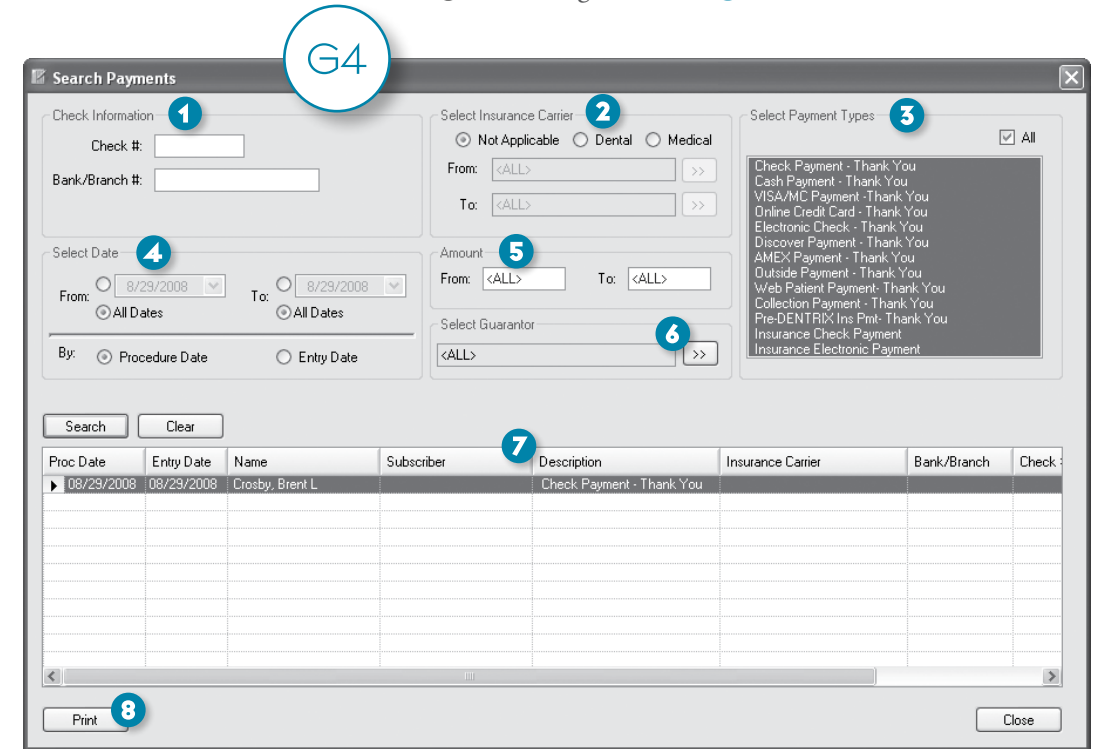
Search Payments

Search payments is a new feature in the Ledger that allows you to search for payments posted in the Ledger. This section displays the Search Payments dialog and describes each feature.

- 1 Enter the check number or bank/branch number if you want to search for a payment by check number.
- 2 Select dental or medical insurance and select a carrier or a range of carriers by which you want to search.
- 3 Highlight the payment types you want to include in the search, or check All to include all payment types.
- 4 Select a date or date range by which you want to search. Mark whether to search by procedure date or entry date.

- 5 Enter an amount or amount range to search for a payment by the amount.
- 6 Click the search button to select a guarantor by which you want to search.
- 7 Search results are listed in this list box. Click any column heading to sort the list by that column. You can also click and drag columns to rearrange the order of the columns, so they match your preferred workflow.
- 8 Click to print a report of the results of your search, so you have a list of payments that match your search criteria.

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To learn more about the Search Payments feature, consult the Ledger chapter of the DENTRIX G4 User's Guide, call 1.800.336.8749 to schedule office training with a certified trainer, or visit www.dentrix.com for other training options and on-demand content.

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