

# Insurance: Billing & Collections

Do it right to get paid faster.



1 Day: 9:00 a.m. – 5:00 p.m.

## Setting Up Insurance in Dentrix

- Adding an insurance plan to Dentrix
- Assigning insurance coverage to a patient
- Updating a coverage table
- Entering deductibles met/benefits used
- Editing insurance claim information
- Understanding insurance estimates in Dentrix

## Managing Insurance Claims

- Creating and deleting pre-authorizations, primary claims, and secondary claims
- Splitting primary insurance claims
- Updating secondary insurance information
- Editing and deleting insurance payments
- Entering an additional insurance payment
- Entering adjustments to insurance payments
- Creating claims using the Batch Primary Insurance Claims Utility
- Adding and editing claim information, including claim remarks and attachments
- Setting and editing insurance claim status and notes
- Adding explanation of benefits to the Document Center
- Finding a closing claims without assignment of benefits
- Entering batch insurance payments
- Editing a pre-treatment authorization

## Customizing Up Claim Defaults

- Setting the default signature on file options for new subscribers
- Adding, editing, and deleting claim formats and assigning claim formats to insurance plans
- Specifying where information prints on DX2007, DX2012, or DX2018 forms
- Adding and editing provider insurance IDs and signature options
- Setting up default claim providers and insurance payment options
- Setting up claim remark templates
- Setting up direct processing and fast checkout options

## Monitoring Insurance Claims

- Understanding the Insurance Claim Aging Report
- Understanding the Preauthorization Aging Report
- Understanding the Procedures Not Attached to Insurance Claims Report
- Understanding the Secondary Insurance Claims not Created Report
- Understanding the Insurance Claims to Process Report
- Understanding the Preauthorizations to Process Report