

Dentrix 2025 Canada

RELEASE GUIDE

Includes information about new features, enhancements, and fixes
in the following versions of Dentrix Canada: 25.16, 25.15, 25.14,
25.13, 25.12, 25.11, 25.10, 25.9, 25.8, 25.7, 25.6, 25.5, 25.4, 25.3, 25.2,
25.1

PUBLICATION DATE

August 2025

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Dentrix 25.16 Canada

Overview and New Features

This Dentrix 25.16 Canada Release Guide provides information about the Dentrix 25.16 Canada 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 25.16 Canada.

Note: For information about using the new features in Dentrix 25.16 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.16 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.16 Canada includes the following enhancements:

THE REDESIGNED FAMILY FILE WINDOW

The redesigned Family File window is now available for all Beta offices to view and try out. We invite your feedback. You can preview the latest features in this Release Guide:

- You can customize the Family File toolbar by inserting separators and adding, removing, or rearranging toolbar buttons. You can reverse any changes you make to the toolbar at any time.

MISCELLANEOUS

- You can now more easily revalidate and reinstall your Windows network credentials when a workstation cannot access the Common Share folder on the server.

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 features and enhancements, refer to the Dentrix Help.

Previewing the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. You can preview the proposed changes.

Note: Currently, the new Family File window consists of several cards (Contact Information, Patient Information, Continuing Care, Primary Dental Insurance, Notes, Billing Information, and so on).

To preview the redesigned Family File

1. Open the Family File and select a patient.

Dentrix Family File - Allard, Nathalie J (Nat)

File Edit Help

Try the New Family File (Beta) You can switch back anytime if it's not the right fit. ☐ Try the New Family File

Name: Allard, Nathalie J (Nat) Address: 4253 Wilson Ave. Montreal, PQ R3D-9J7 Phone: H (514)555-8596, W (514)555-4985 Status: Active, F, Single, Guar, Ins, H-of-H		Chart #: SIN: 595-745-856 DL#: Birthday: 1983-04-01, 42 Provider: MJL1 Fee Sched: <Prov Default>													
Health History	Employer Y M C A	E-Mail: Cont. Care													
Primary Dental Insurance Company: Zurich Group Plan: Y M C A Group #: 44587 Div: 15 Fee Sched: Coverage: 2500.00 Ded. S/P/O: 0/0/0 Other Max:		Patient Notes View													
<table border="1"> <thead> <tr> <th>0-->30</th> <th>31-->60</th> <th>61-->90</th> <th>91--></th> <th>Balance</th> </tr> </thead> <tbody> <tr> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table>		0-->30	31-->60	61-->90	91-->	Balance	0.00	0.00	0.00	0.00	0.00	Referred By Yellow Pages Ad. 2003-02-24 Referred To Dr. Corbett, Janice (Orthodontist) 2006-09-07			
0-->30	31-->60	61-->90	91-->	Balance											
0.00	0.00	0.00	0.00	0.00											
Payment Amt: NA Bill Type: 3 Last Payment: 9.45 Amt Past Due: NA 2006-11-27															
<table border="1"> <thead> <tr> <th>Status</th> <th>Name</th> <th>Position</th> <th>Gender</th> <th>Patient</th> <th>Birthday</th> </tr> </thead> <tbody> <tr> <td>HofH Guar Ins</td> <td>Allard, Nathalie J</td> <td>Single</td> <td>Female</td> <td>Yes</td> <td>1983-04-01</td> </tr> </tbody> </table>	Status	Name	Position	Gender	Patient	Birthday	HofH Guar Ins	Allard, Nathalie J	Single	Female	Yes	1983-04-01			
Status	Name	Position	Gender	Patient	Birthday										
HofH Guar Ins	Allard, Nathalie J	Single	Female	Yes	1983-04-01										

2. To preview the new Family File, click the **Try the New Family File** toggle.
The new Family File window appears.

Family File

File Edit Help

Using the new Family File? We'd love your [feedback](#).

New Family File

Family Member

Nathalie J Allard

Patient

Contact Information

Home Phone #

(514)555-8596

Work Phone #

(514)555-4985

Email

-

Address

4253 Wilson Ave., Montreal

Patient Information

Chart #

-

Gender

Female

Birthday

1983-04-01, 42

SIN

595-745-856

Provider

MJL1

Fee Schedule

<Prov Default>

DL #

-

HofH / Guarantor

Yes

Insurance Subscriber

Yes

Position

Single

Continuing Care

There is no continuing care information on file for this patient.

ADD CONTINUING CARE

Primary Dental Insurance

1 dental

Company

Zurich

Group Plan

Y M C A

Group #

44587

Fee Schedule

-

Coverage

2500.00

Used

0.00

Ded S/P/O

0/0/0

Met

0/0/0

Other Coverage

-

DETAILS

Notes

HIDE NOTES

pt. is away from Jun-Sept.

Billing Information

Payment Amount

-

Amount Past Due

-

Billing Type

3

Last Payment

9.45

Aging Schedule

0 → 30

31 → 60

61 → 90

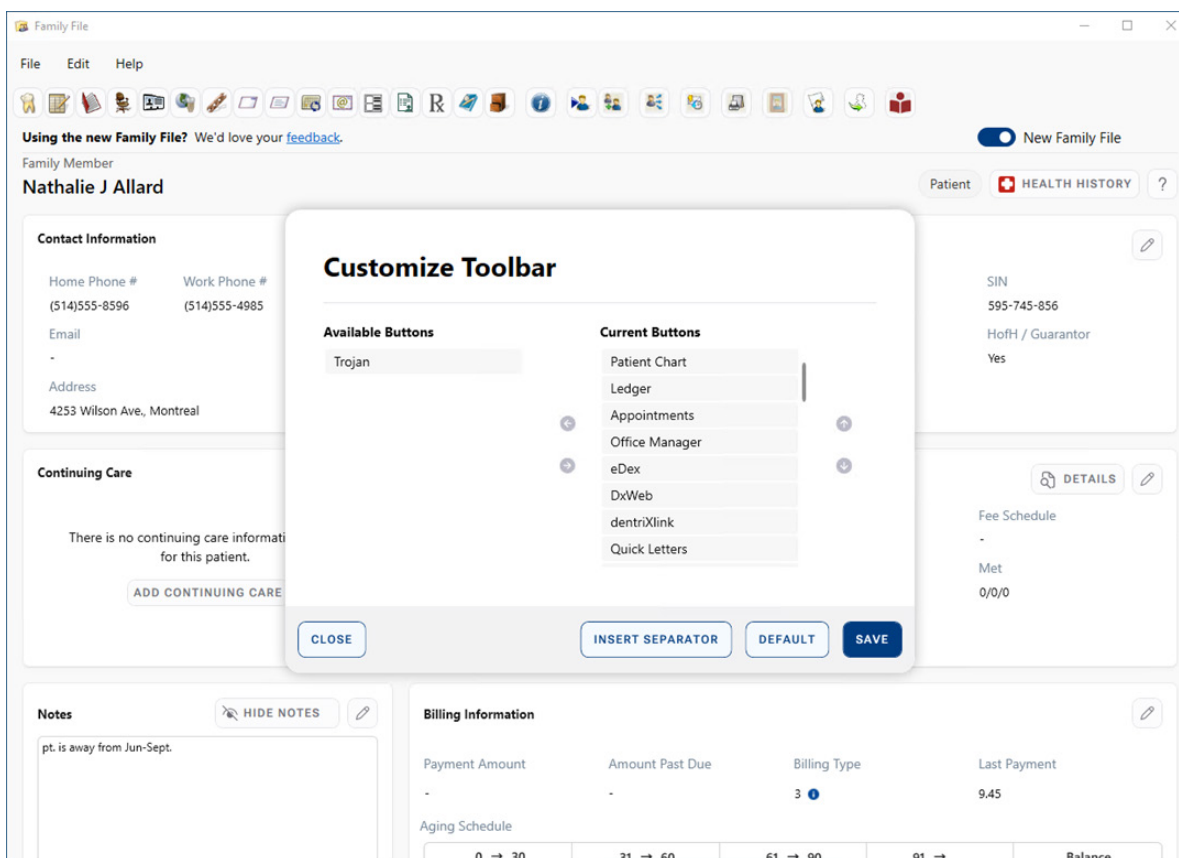
91 →





Balance

3. To customize the toolbar, right-click the blank space to the right of the toolbar, and then click **Customize Toolbar**.

The **Customize Toolbar** dialog box appears.

Dentrix 2025 Canada Release Guide



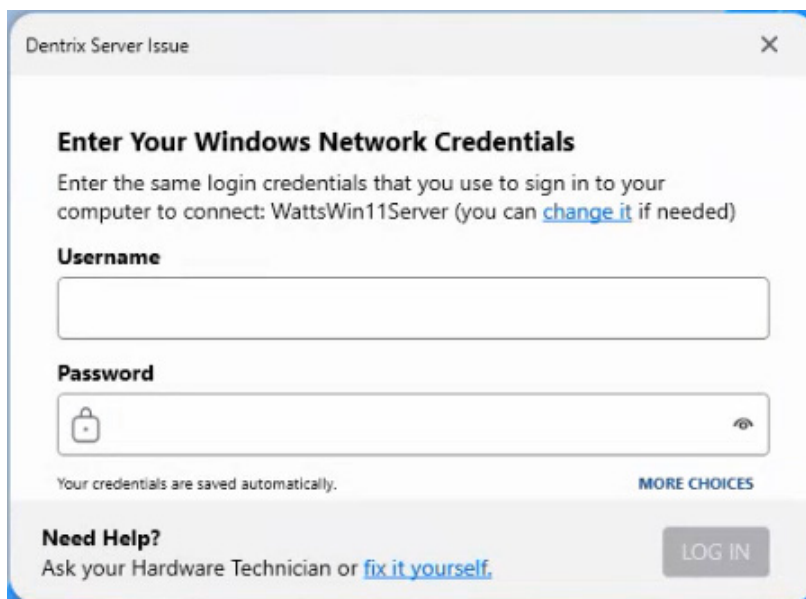
4. Do one or more of the following:
 - Insert a separator – In the **Current Buttons** list, click the desired button name, and then click **Insert Separator**.
 - Add a button – In the **Available Buttons** list, click the desired button name, and then click the **Move to Document** button .
 - Remove a button – In the **Current Buttons** list, click the desired button name, and then click the **Move to Available** button .
 - Rearrange toolbar buttons – In the **Current Buttons** list, click the desired button name, and then click the **Move Up**  or the **Move Down** button .
5. To save your changes, click **Save**.
6. To reverse your changes at any time, open the **Customize Toolbar** dialog box, click **Default**, and then click **Save**.

Revalidating and Reinstalling the Windows Network Credentials

You can now more easily revalidate and reinstall your Windows network credentials when a workstation cannot access the Common Share folder on the server

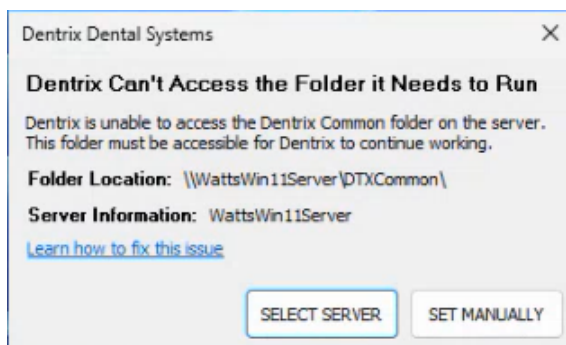
To revalidate and reinstall your Windows network credentials

1. If your workstation cannot access the Common Share folder, the **Dentrix Server Issue** dialog box appears.



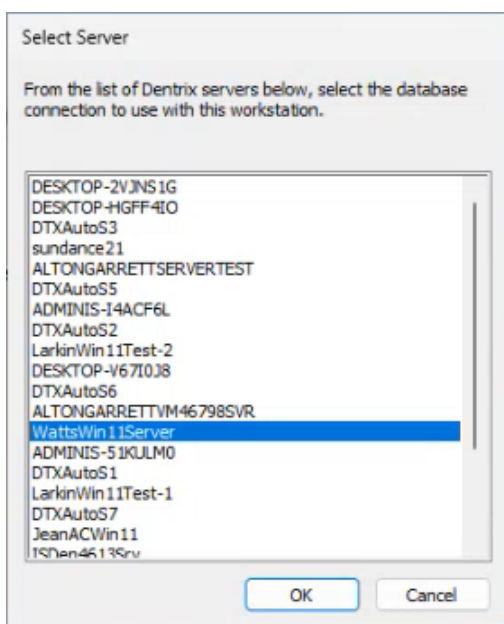
A dialog box titled "Dentrix Server Issue" with a close button (X) in the top right corner. The main heading is "Enter Your Windows Network Credentials". Below it, a message states: "Enter the same login credentials that you use to sign in to your computer to connect: WattsWin11Server (you can [change it](#) if needed)". There are two input fields: "Username" and "Password". The "Password" field has a lock icon on the left and an eye icon on the right. Below the password field, a message says "Your credentials are saved automatically." and a link "MORE CHOICES" is on the right. At the bottom, there is a "Need Help?" section with the text "Ask your Hardware Technician or [fix it yourself.](#)" and a "LOG IN" button.

2. Type your username and password, and then click **Log In**.
Your credentials are saved automatically to the Microsoft Windows Credential Manager.
3. If you want to change servers, click the **change it** link.
The following dialog box appears.

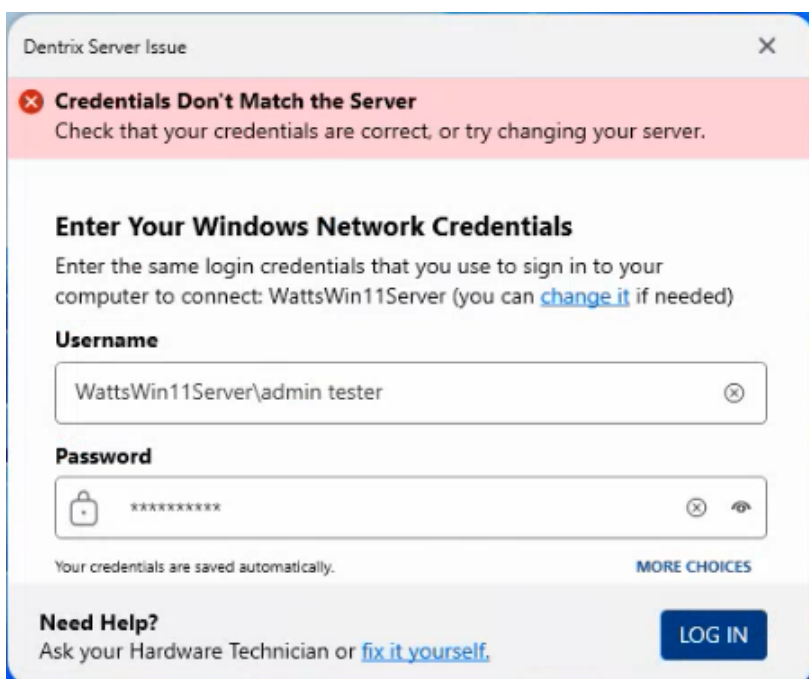


An error dialog box titled "Dentrix Dental Systems" with a close button (X) in the top right corner. The main heading is "Dentrix Can't Access the Folder it Needs to Run". Below it, a message states: "Dentrix is unable to access the Dentrix Common folder on the server. This folder must be accessible for Dentrix to continue working." There are two lines of text: "Folder Location: \\WattsWin11Server\PTXCommon\" and "Server Information: WattsWin11Server". Below these, there is a link "[Learn how to fix this issue](#)". At the bottom, there are two buttons: "SELECT SERVER" and "SET MANUALLY".

4. Click **Select Server**.
The **Select Server** dialog box appears.



5. Select the desired server, and then click **OK**.
The **Dentrix Server Issue** dialog box appears.
6. Type your username and password, and then click **Log In**.
If the credentials you entered are incorrect, a banner appears in the **Dentrix Server Issue** dialog box.



7. Re-enter your credentials, and then click **Log In**.
The module that you tried to open when the error occurred and the **Credential Manager** dialog box open. To save your credentials for the server you selected, refresh the Credential Manager.

Note: If you want to resolve the issue yourself, click the fix it yourself link. A Knowledge Base article opens explaining how to resolve the issue.

Dentrix 25.15 Canada

Overview and New Features

This Dentrix 25.15 Canada Release Guide provides information about the Dentrix 25.15 Canada 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 25.15 Canada.

Note: For information about using the new features in Dentrix 25.15 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.15 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.15 Canada includes the following enhancements:

THE REDESIGNED FAMILY FILE WINDOW

The redesigned Family File window is now available for all Beta offices to view and try out. We invite your feedback. You can preview the latest features in this Release Guide:

- You can now click the **Try the New Family File** toggle to close the classic Family File and open the new Family File.
- You can now click the **New Family File** toggle to close the new Family File and open the classic Family File.
- The new Family File now includes toolbar buttons from which you can open other Dentrix modules or select a patient.
- The new Family File now includes an **Edit** menu from which you can edit family relations or delete a patient or a family.

MISCELLANEOUS

- When you open Dentrix Imaging, a splash screen appears announcing an improved workflow for taking X-rays using your DEXIS sensor. Also included is a video tour of Dentrix Imaging.

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 features and enhancements, refer to the Dentrix Help.

Previewing the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. You can preview the proposed changes.

Note: Currently, the new Family File window consists of several cards (Contact Information, Patient Information, Continuing Care, Primary Dental Insurance, Notes, Billing Information, and so on).

To preview the redesigned Family File

1. Open the Family File and select a patient.

Dentrix Family File - Allard, Nathalie J (Nat)

File Edit Help

Try the New Family File (Beta) You can switch back anytime if it's not the right fit. ☐ Try the New Family File

Name: Allard, Nathalie J (Nat) Address: 4253 Wilson Ave. Montreal, PQ R3D-9J7 Phone: H (514)555-8596, W (514)555-4985 Status: Active, F, Single, Guar, Ins, H-of-H		Chart #: SIN: 595-745-856 DL#: Consent: 2003-02-24 First Visit: 2003-02-24 Last Visit: 2006-02-08 Missed Appt: Fee Sched: <Prov Default>													
Health History	Employer: Y M C A	E-Mail: Cont. Care													
Primary Dental Insurance Company: Zurich Group Plan: Y M C A Group #: 44587 Div: 15 Fee Sched: Coverage: 2500.00 Ded. S/P/O: 0/0/0 Other Max: Used: 0.00 Met: 0/0/0		Patient Notes View													
<table border="1"> <thead> <tr> <th>0-->30</th> <th>31-->60</th> <th>61-->90</th> <th>91--></th> <th>Balance</th> </tr> </thead> <tbody> <tr> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table>		0-->30	31-->60	61-->90	91-->	Balance	0.00	0.00	0.00	0.00	0.00	Referred By Yellow Pages Ad. 2003-02-24 Referred To Dr. Corbett, Janice (Orthodontist) 2006-09-07			
0-->30	31-->60	61-->90	91-->	Balance											
0.00	0.00	0.00	0.00	0.00											
Payment Amt: NA Bill Type: 3 Last Payment: 9.45 Amt Past Due: NA 2006-11-27															
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Status	Name	Position	Gender	Patient	Birthday										
HofH Guar Ins	Allard, Nathalie J	Single	Female	Yes	1983-04-01										

2. To preview the new Family File, click the Try the New Family File toggle.
The new Family File window appears.

Family File

File Edit Help

Using the new Family File? We'd love your [feedback](#).

Family Member **Nathalie J Allard** Patient **HEALTH HISTORY** ?

Contact Information

Home Phone # (514)555-8596 Work Phone # (514)555-4985

Email -

Address 4253 Wilson Ave, Montreal

Patient Information

Chart # - Gender Female Birthday 1983-04-01, 42 SIN 595-745-856

Provider MJL1 Fee Schedule <Prov Default> DL # - HofH / Guarantor Yes

Insurance Subscriber Yes Position Single

Continuing Care

There is no continuing care information on file for this patient.

ADD CONTINUING CARE

Primary Dental Insurance 1 dental

Company Zurich Group Plan Y M C A Group # 44587 Fee Schedule -

Coverage 2500.00 Used 0.00 Ded S/P/O 0/0/0 Met 0/0/0

Other Coverage -

Notes HIDE NOTES

pt. is away from Jun-Sept.

Billing Information

Payment Amount - Amount Past Due - Billing Type 3 Last Payment 9.45

Aging Schedule

0 → 30 31 → 60 61 → 90 91 → Balance

- Click Edit.
- The Edit menu appears.

Family File

File Edit Help

Using the new Family File? We'd love your [feedback](#).

Family Member **Nathalie J Allard** Patient **HEALTH HISTORY** ?

Edit

- Set Head Of House
- Edit Family Relations
- Delete Patient
- Delete Family
- Continuing Care Defaults

Contact Information

Home Phone # (514)555-8596 Work Phone # (514)555-4985

Email -

Address 4253 Wilson Ave, Montreal

Patient Information

Chart # - Gender Female Birthday 1983-04-01, 42 SIN 595-745-856

Provider MJL1 Fee Schedule <Prov Default> DL # - HofH / Guarantor Yes

Insurance Subscriber Yes Position Single

Continuing Care

There is no continuing care information on file for this patient.

ADD CONTINUING CARE

Primary Dental Insurance 1 dental

Company Zurich Group Plan Y M C A Group # 44587 Fee Schedule -

Coverage 2500.00 Used 0.00 Ded S/P/O 0/0/0 Met 0/0/0

Other Coverage -

Billing Information

Payment Amount - Amount Past Due - Billing Type 3 Last Payment 9.45

Aging Schedule

0 → 30 31 → 60 61 → 90 91 → Balance

- Click Edit Family Relations.
- The Edit Family Relations dialog box appears.

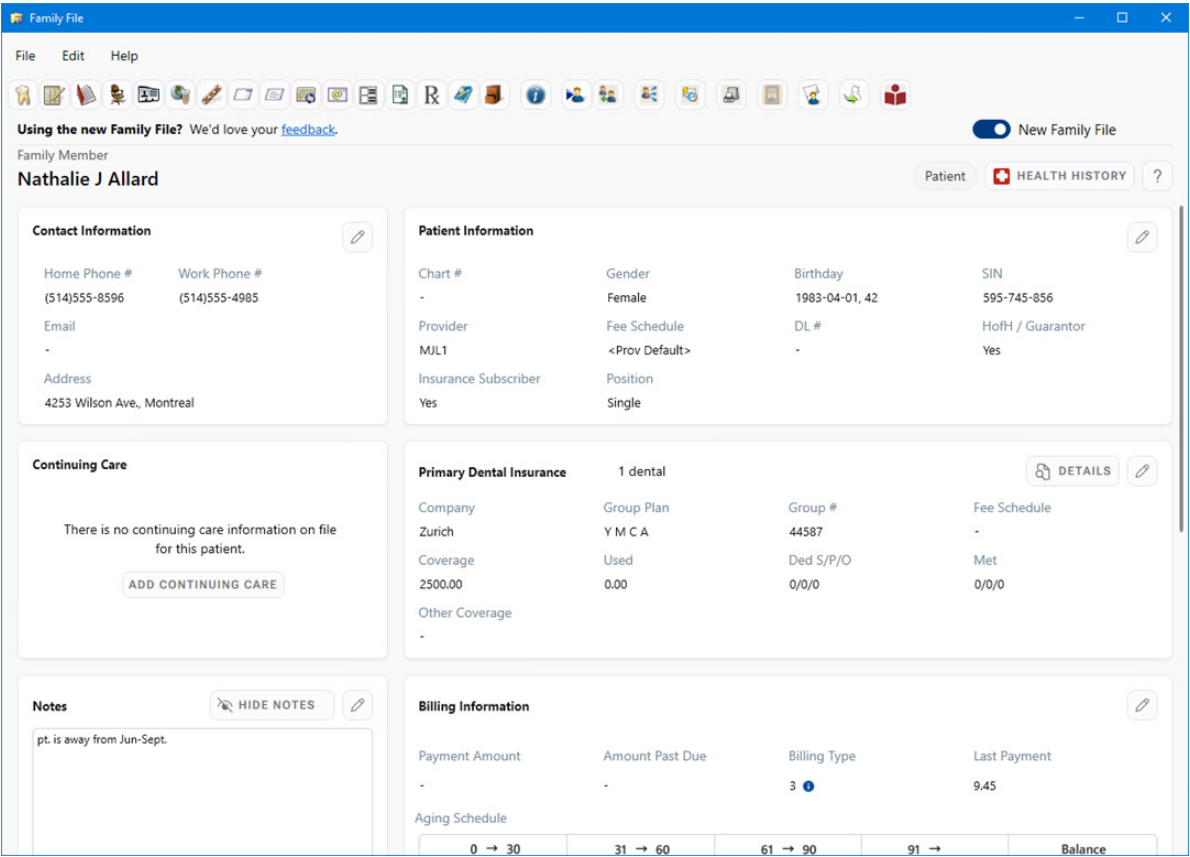
Note: You can use the Edit Family Relations dialog box move a patient to a new account or combine two accounts. For more information, please refer to [Editing family relationships](#) in the Dentrix Help.

Switching to the Classic Family File

You can now click the New Family File toggle to switch from the redesigned Family File to the classic Family File.

To switch from the new Family File to the classic Family File

1. Open the Family File, select a patient, and then switch to the new Family File.
The new Family File window appears.



2. To switch back to the classic Family File, click the **New Family File** toggle.
- The new Family File window closes, and the classic Family File window appears.

Opening Dentrix Modules Using the New Family File Toolbar

The new Family File now includes toolbar buttons from which you can open other Dentrix modules or select a patient.

To open a Dentrix module using the new Family File toolbar

1. Open the new Family File.
- The new Family File window appears.

Family File

File Edit Help

Using the new Family File? We'd love your [feedback](#).

Family Member **Nathalie J Allard** Patient **HEALTH HISTORY**

Contact Information

Home Phone # (514)555-8596 Work Phone # (514)555-4985

Email -

Address 4253 Wilson Ave., Montreal

Patient Information

Chart # - Gender Female Birthdate 1983-04-01, 42 SIN 595-745-856

Provider MJ/L1 Fee Schedule <Prov Default> DL # - HofH / Guarantor Yes

Insurance Subscriber Yes Position Single

Continuing Care

There is no continuing care information on file for this patient.

ADD CONTINUING CARE

Primary Dental Insurance 1 dental

Company Zurich Group Plan Y M C A Group # 44587 Fee Schedule -

Coverage Used Ded S/P/O 0/0/0 Met 0/0/0

Other Coverage -

Notes HIDE NOTES

pt. is away from Jun-Sept.

Billing Information

Payment Amount - Amount Past Due - Billing Type 3 Last Payment 9.45

Aging Schedule

0 → 30 31 → 60 61 → 90 91 → Balance

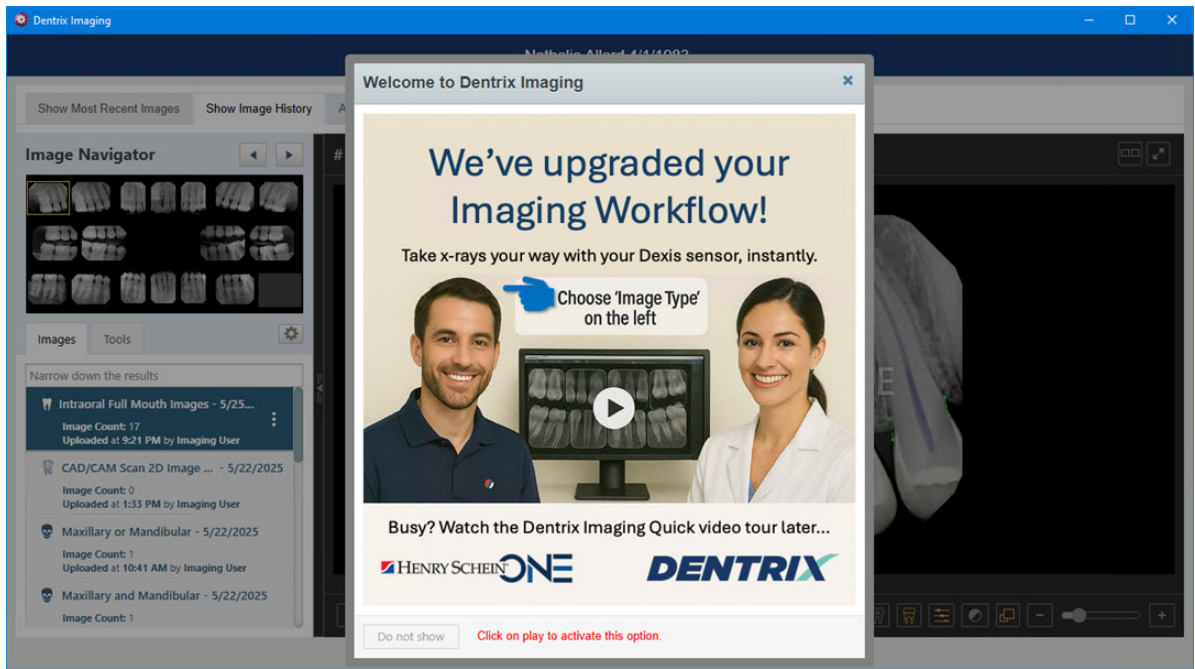
- To open another Dentrix module, click the toolbar button corresponding to the desired module.

Viewing the Dentrix Imaging Tour

When you open Dentrix Imaging, a splash screen appears announcing an improved workflow for taking X-rays using your DEXIS sensor. Also included is a video tour of Dentrix Imaging.

To view the Dentrix Imaging tour

- Open the Patient Chart, and select a patient.
The Patient Chart window opens.
- In the Imaging toolbar, click the Launch Dentrix Imaging toolbar button.
Dentrix Imaging opens, and the **Welcome to Dentrix Imaging** dialog box appears.



3. To view the tour, click the Play icon.

Dentrix 25.14 Canada

Overview and New Features

This Dentrix 25.14 Canada Release Guide provides information about the Dentrix 25.14 Canada 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 25.14 Canada.

Note: For information about using the new features in Dentrix 25.14 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.14 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.14 Canada includes the following enhancements:

THE REDESIGNED FAMILY FILE WINDOW

The redesigned Family File window is now available for all Beta offices to view and try out. We invite your feedback. You can preview the latest features in this Release Guide:

MISCELLANEOUS

- In the Office Journal, the Info panel now has a minimum size limitation.
- In the Treatment Planner, the **Update Current Case Status** dialog box and **Update Current Case Status** in the **Case Status History** tab were modified.
- In the Patient Chart, the Smart Image panel has been renamed to Imaging.

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 features and enhancements, refer to the Dentrix Help.

Previewing the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. You can preview the proposed changes.

Note: Currently, the new Family File window consists of several cards (Contact Information, Patient Information, Continuing Care, Primary Dental Insurance, Notes, Billing Information, and so on).

To preview the redesigned Family File

1. Open the Family File and select a patient.

Dentrix Family File - Murray, James

File Edit Help

Name: Murray, James
Address: 723 Oak Lane
 Calgary, AB T2P-9K8
Phone: M (746)555-0982
Status: Non-Pat, M, Married, Guar, H-of-H
Consent: 2025-02-04
First Visit:
Last Visit:
Missed Appt:
Chart #:
SIN:
DL#:
Birthday: 1995-10-13, 29
Provider: JLD1
Fee Sched: <Prov Default>
E-Mail: jmmurray@email.com

Health History **Employer** **Cont. Care**

Primary Dental Insurance
Company:
Group Plan:
Group #:
Fee Sched:
Coverage: 0.00
Ded. S/P/O: 0/0/0
Other Max:
Used: 0.00
Met: 0/0/0

Patient Notes
 (No Note)

0-->30	31-->60	61-->90	91-->	Balance
0.00	0.00	0.00	0.00	0.00

Payment Amt: NA **Amt Past Due:** NA
Bill Type: 1 **Last Payment:** 0.00

Referred By
 Dacro, Jack 2025-02-04

Referred To

Status	Name	Position	Gender	Patient	Birthday
HofH Guar	Murray, James	Married	Male	No	1995-10-13
	Murray, Jenny	Married	Female	No	1996-06-02

2. Click **File**, point to **Switch To**, and then click **Preview New Family File**.

The new Family File window appears.

Family File

File Help

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member

Nathalie J Allard

Patient

HEALTH HISTORY

Contact Information

Home Phone #
(514)555-8596

Work Phone #
(514)555-4985

Email
-

Address
4253 Wilson Ave., Montreal

Patient Information

Chart #
-

Gender
Female

Provider
MJL1

Insurance Subscriber
Yes

Birthday
2006-04-01, 19

Fee Schedule
<Prov Default>

Position
Single

SIN
595-745-856

HofH / Guarantor
Yes

Continuing Care

There is no continuing care information on file for this patient.

ADD CONTINUING CARE

Notes

SHOW NOTES

Notes are Hidden

Click "Show Notes" to see any notes on file.

Primary Dental Insurance

1 dental

DETAILS

Company
Zurich

Coverage
2500.00

Other Coverage
-

Group Plan
Y M C A

Used
0.00

Group #
44587

Ded S/P/O
0/0/0

Fee Schedule
-

Met
0/0/0

Billing Information

Payment Amount
-

Amount Past Due
-

Aging Schedule

0 → 30	31 → 60	61 → 90	91 →	Balance
0.00	0.00	0.00	0.00	0.00

Billing Type
3

Last Payment
9.45

3. Click File.
- The File menu appears.

Family File

File Help

new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member

Nathalie J Allard

Patient

HEALTH HISTORY

Contact Information

Home Phone #
(514)555-8596

Work Phone #
(514)555-4985

Email
-

Address
4253 Wilson Ave., Montreal

Patient Information

Chart #
-

Gender
Female

Provider
MJL1

Insurance Subscriber
Yes

Birthday
2006-04-01, 19

Fee Schedule
<Prov Default>

Position
Single

SIN
595-745-856

HofH / Guarantor
Yes

Continuing Care

There is no continuing care information on file for this patient.

ADD CONTINUING CARE

Notes

SHOW NOTES

Notes are Hidden

Click "Show Notes" to see any notes on file.

Primary Dental Insurance

1 dental

DETAILS

Company
Zurich

Coverage
2500.00

Other Coverage
-

Group Plan
Y M C A

Used
0.00

Group #
44587

Ded S/P/O
0/0/0

Fee Schedule
-

Met
0/0/0

Billing Information

Payment Amount
-

Amount Past Due
-

Aging Schedule

0 → 30	31 → 60	61 → 90	91 →	Balance
0.00	0.00	0.00	0.00	0.00

Billing Type
3

Last Payment
9.45

Select Patient
F2

Clear Family

Refresh
F5

New Family

Add New Family Member

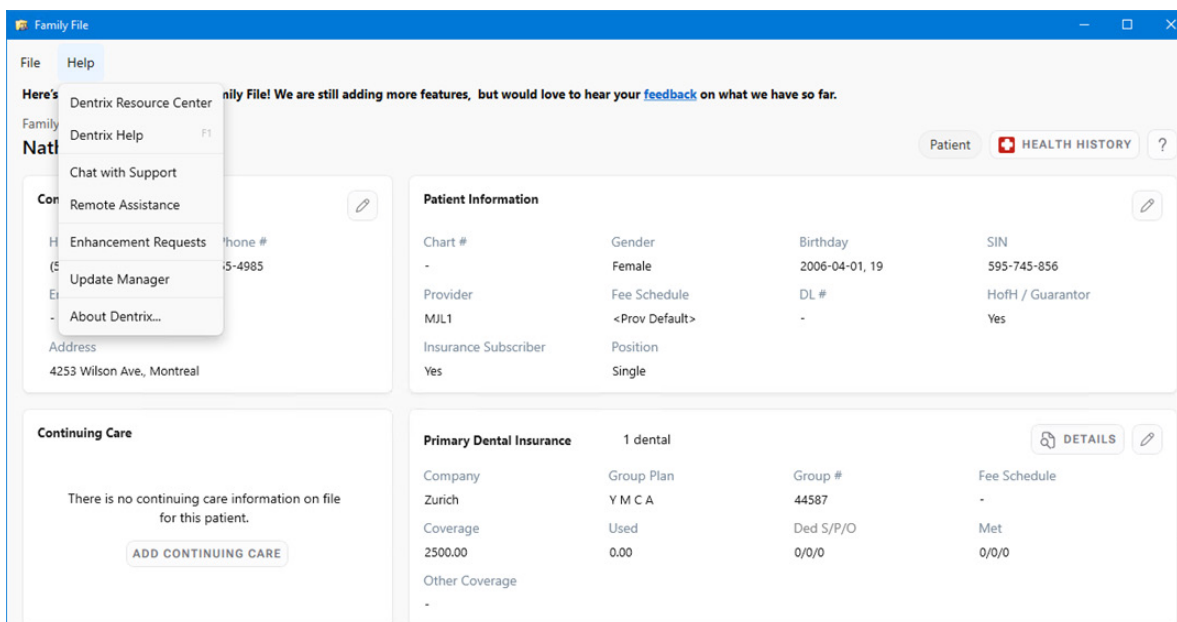
Referral Analysis

Submission History

Print Patient Notes

Exit

4. Click Help.
- The Help menu appears.



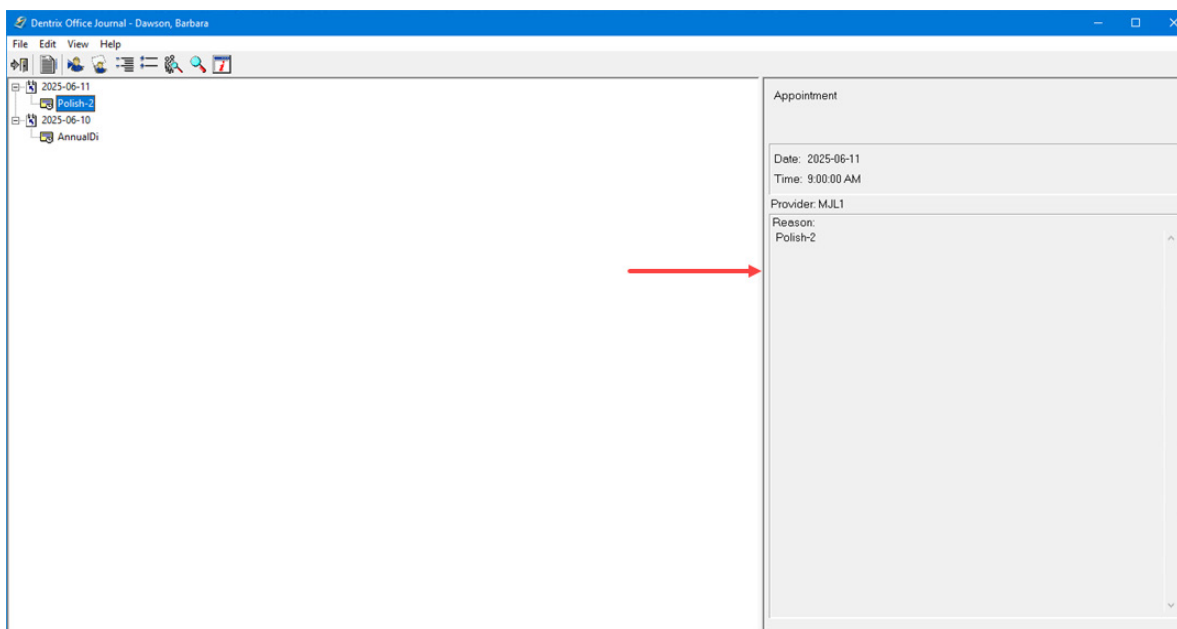
Note: To open the Help file that is specific to the redesigned Family File, click the question mark icon to the right of the Health History button.

Resizing the Office Journal Info Panel

The Info panel in the Office Journal was modified to have a minimum size limitation.

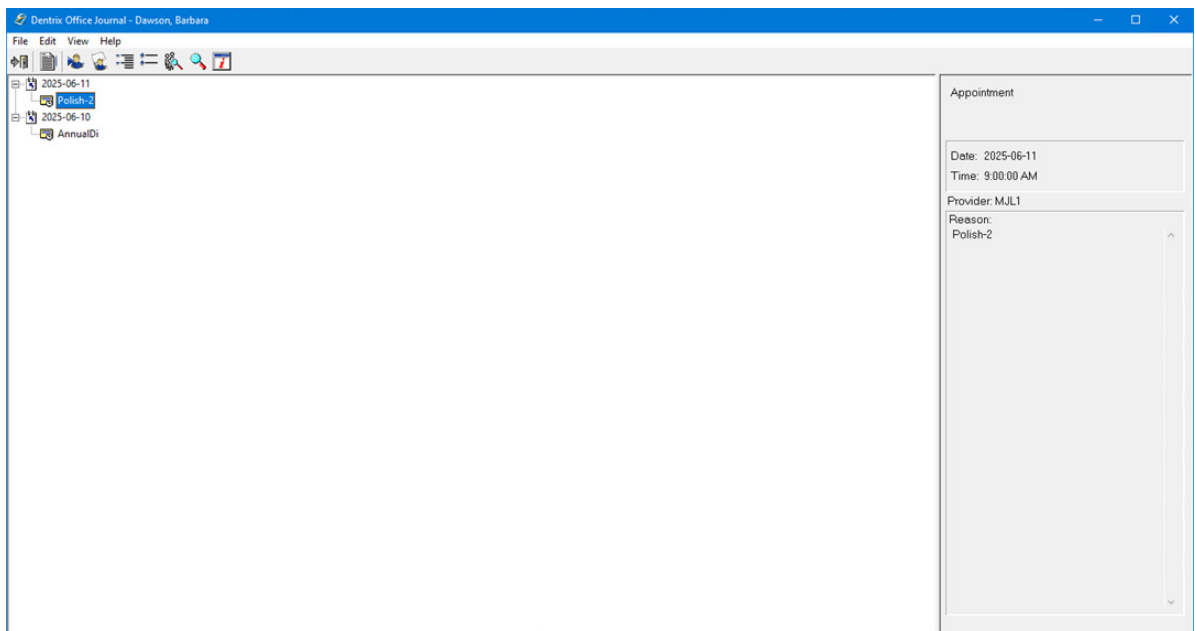
To resize the Office Journal info panel

1. From any Dentrix module except the Office Manager, open the Office Journal.
The Office Journal window appears.



Note: If necessary, click the Show Info toolbar button to open the Info panel.

2. Click the separator line, and then drag the line to the left to increase or to the right to decrease the size of the Info panel.



Note: When you next open the Office Journal, the Info panel will remain sized the way you modified it.

Updating Case Status in the Treatment Planner

The Update Current Case Status dialog box and Update Current Case Status in Case Status History were modified.

To update case status in the Treatment Planner

1. In the Treatment Planner, select the desired case, click the Update Case Status toolbar button, and then from the menu, click **Proposed**.

The Update Current Case Status dialog box appears.

 The dialog box is titled 'Update Current Case Status'. It contains the following fields:

- New Case Status:** A dropdown menu currently showing 'Proposed'.
- Date:** A date picker showing '2025-07-22'.
- Rejection Reason:** A dropdown menu showing '<Select Reason>'.
- Comment:** A large text area for entering a comment.

 At the bottom are 'OK' and 'Cancel' buttons.

2. To select a rejection reason, click <Select Reason>, and then from the menu, click the reason the patient rejects the proposed treatment.

Update Current Case Status

New Case Status: Proposed

Date: 2025-07-22

Rejection Reason: <Select Reason>

Comment: <Select Reason>
Money
Urgency
Sense of Fear
Time
Trust
Other

OK Cancel


Note: If the patient's reason is **Other**, you must describe the reason in the **Comment** text box.

3. Click OK.

Note: You can also update case status in **Case Status History**.


4. To update case status in **Case Status History**, click the **Case Study History** tab.
The **Case Status History** panel appears.

Case Status History

Case  **Treatment Plan**
Created: 2022-01-13

Case Status History:

Date	Status	Reason	Comment
2022-01-13	Created		Case created by database con

<  >


Update Current Case Status


New Case Status: Referred ▼


Referred: <Select Provider> >...


Comment:


Update


 **Treatment Plan Case Setup**

 **Insurance/Case Amounts**

 **Supporting Information**

 **Case Status History**

 **Case Presentation Setup**

 **Settings**

- Under **Update Current Case Status**, click a status from the **New Case Status** list.

Note: Depending on the status you chose, you may need to provide a reason the case was rejected, or if you referred the patient to another provider, select a provider.

- Click **Update**.

Dentrix 25.13 Canada

Overview and New Features

This Dentrix 25.13 Canada Release Guide provides information about the Dentrix 25.13 Canada 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 25.13 Canada.

Note: For information about using the new features in Dentrix 25.13 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.13 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.13 Canada includes the following enhancements:

THE REDESIGNED FAMILY FILE WINDOW

The redesigned Family File window is now available for all Beta offices to view and try out. We invite your feedback. You can preview the latest features in this Release Guide:

- The File and Help menus were added.

MISCELLANEOUS

- The Practice Notifications window is now anchored to the Appointment Book.
- The Terms and Conditions disclaimer is now located at the bottom of the **What’s New** dialog box.
- The Info panel in the Office Journal was modified allowing you to resize it.
- The **E-mail Address** text box in the **Print Treatment Case** dialog box has been modified to allow more characters.
- Dentrix now performs a verification check of completed procedure codes to prevent posting codes twice.

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 features and enhancements, refer to the Dentrix Help.

Previewing the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. You can preview the proposed changes.

Note: Currently, the new Family File window consists of several cards (Contact Information, Patient Information, Continuing Care, Primary Dental Insurance, Notes, Billing Information, and so on).

To preview the redesigned Family File

1. Open the Family File and select a patient.

Dentrix Family File - Murray, James

File Edit Help

Name: Murray, James
Address: 723 Oak Lane
 Calgary, AB T2P-9K8
Phone: M (746)555-0982
Status: Non-Pat, M, Married, Guar, H-of-H
Consent: 2025-02-04
First Visit:
Last Visit:
Missed Appt:
Chart #:
SIN:
DL#:
Birthday: 1995-10-13, 29
Provider: JLD1
Fee Sched: <Prov Default>
E-Mail: jmmurray@email.com

Health History **Employer** **Cont. Care**

Primary Dental Insurance
Company:
Group Plan:
Group #:
Fee Sched:
Coverage: 0.00
Ded. S/P/O: 0/0/0
Other Max:
Used: 0.00
Met: 0/0/0

Patient Notes
 (No Note)

0-->30	31-->60	61-->90	91-->	Balance
0.00	0.00	0.00	0.00	0.00

Payment Amt: NA **Amt Past Due:** NA
Bill Type: 1 **Last Payment:** 0.00

Referred By
 Dacro, Jack 2025-02-04

Referred To

Status	Name	Position	Gender	Patient	Birthday
HofH Guar	Murray, James	Married	Male	No	1995-10-13
	Murray, Jenny	Married	Female	No	1996-06-02

2. Click **File**, point to **Switch To**, and then click **Preview New Family File**.


The new Family File window appears.

Family File

File Help

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member
Nathalie J Allard

Patient  HEALTH HISTORY ?

Contact Information

Home Phone # (514)555-8596
Work Phone # (514)555-4985
Email -
Address 4253 Wilson Ave., Montreal

Patient Information

Chart #	Gender	Birthday	SIN
-	Female	2006-04-01, 19	595-745-856
Provider	Fee Schedule	DL #	HofH / Guarantor
MJL1	<Prov Default>	-	Yes
Insurance Subscriber	Position		
Yes	Single		

Continuing Care

There is no continuing care information on file for this patient.

[ADD CONTINUING CARE](#)

Notes

[SHOW NOTES](#)

Notes are Hidden
Click "Show Notes" to see any notes on file.

Primary Dental Insurance 1 dental

[DETAILS](#)

Company	Group Plan	Group #	Fee Schedule
Zurich	Y M C A	44587	-
Coverage	Used	Ded S/P/O	Met
2500.00	0.00	0/0/0	0/0/0
Other Coverage			
-			

Billing Information

Payment Amount	Amount Past Due	Billing Type	Last Payment
-	-	3	9.45

Aging Schedule

0 → 30	31 → 60	61 → 90	91 →	Balance
0.00	0.00	0.00	0.00	0.00


- Click **File**.
The **File** menu appears.

Family File

File Help

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member
Nathalie J Allard

Patient  HEALTH HISTORY ?

Contact Information

Home Phone # (514)555-8596
Work Phone # (514)555-4985
Email -
Address 4253 Wilson Ave., Montreal

Patient Information

Chart #	Gender	Birthday	SIN
-	Female	2006-04-01, 19	595-745-856
Provider	Fee Schedule	DL #	HofH / Guarantor
MJL1	<Prov Default>	-	Yes
Insurance Subscriber	Position		
Yes	Single		

Continuing Care

There is no continuing care information on file for this patient.

[ADD CONTINUING CARE](#)

Notes

[SHOW NOTES](#)

Notes are Hidden
Click "Show Notes" to see any notes on file.

Primary Dental Insurance 1 dental

[DETAILS](#)

Company	Group Plan	Group #	Fee Schedule
Zurich	Y M C A	44587	-
Coverage	Used	Ded S/P/O	Met
2500.00	0.00	0/0/0	0/0/0
Other Coverage			
-			

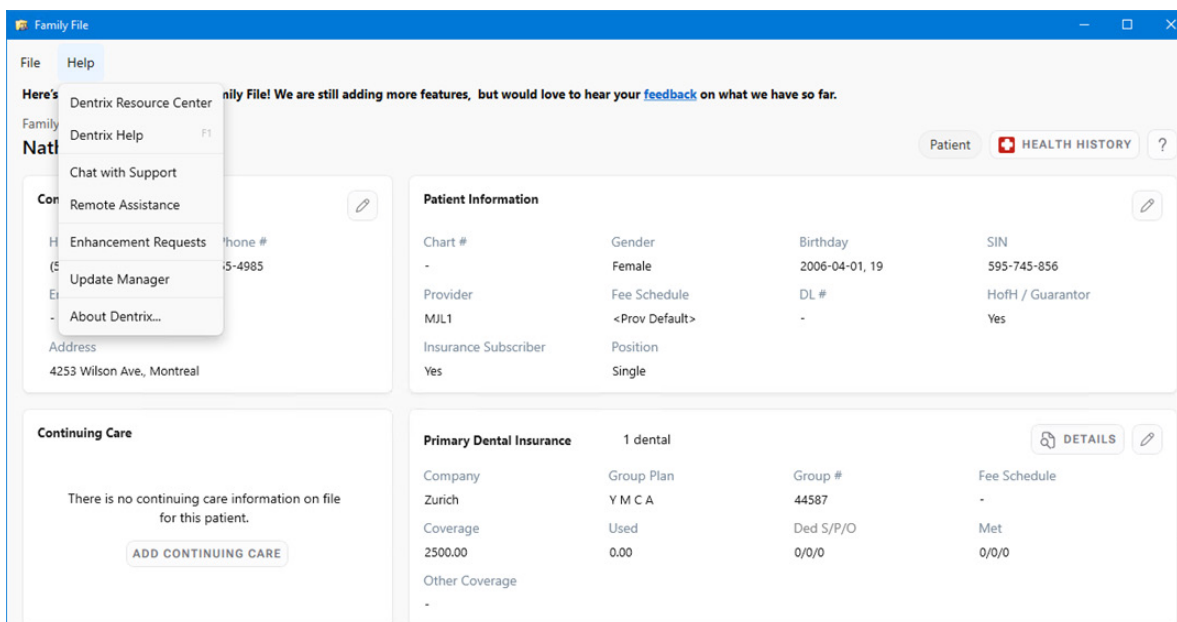
Billing Information

Payment Amount	Amount Past Due	Billing Type	Last Payment
-	-	3	9.45

Aging Schedule

0 → 30	31 → 60	61 → 90	91 →	Balance
0.00	0.00	0.00	0.00	0.00

- Click **Help**.
The **Help** menu appears.



Note: To open the Help file that is specific to the redesigned Family File, click the question mark icon to the right of the Health History button.

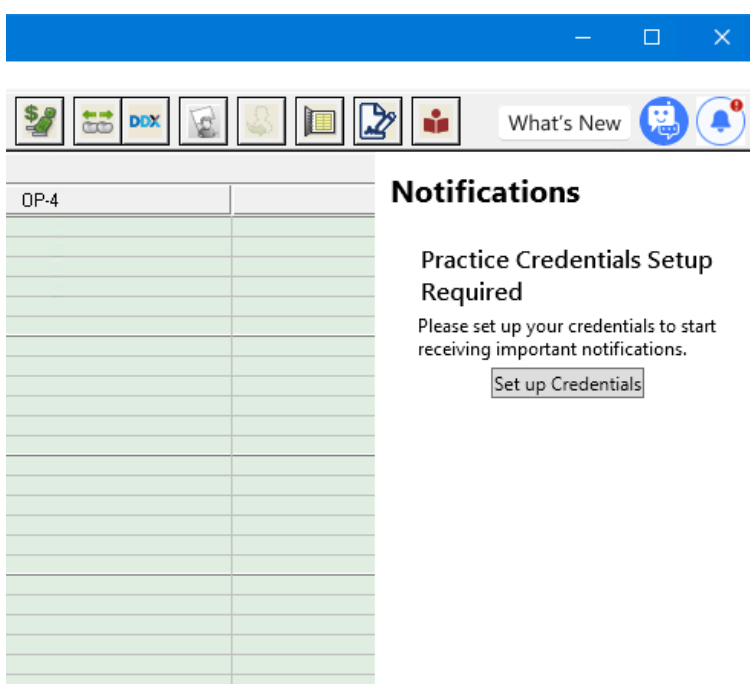
Opening and Closing Practice Notifications

The Practice Notifications window is now anchored to the Appointment Book.

To open Practice Notifications

1. Open the Appointment Book.
2. Click the Practice Notifications button.

The Practice Notifications window appears.



3. To close the Practice Notifications window, click anywhere outside the window.

Reviewing the Terms and Conditions Disclaimer

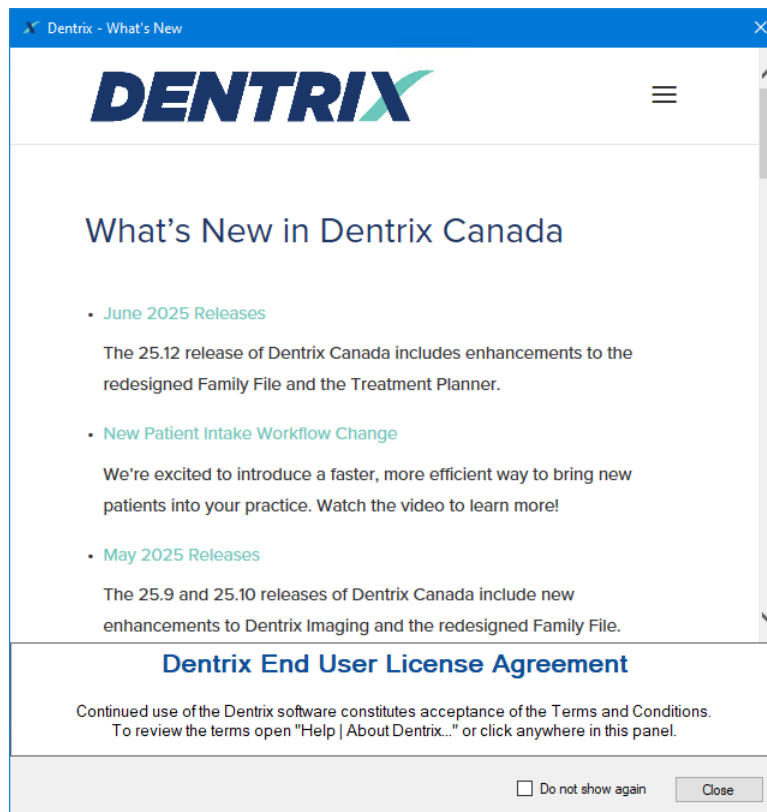
The Terms and Conditions disclaimer now appears at the bottom of the **What's New** dialog box.

To review the Terms and Conditions disclaimer

1. Open any Dentrix module.

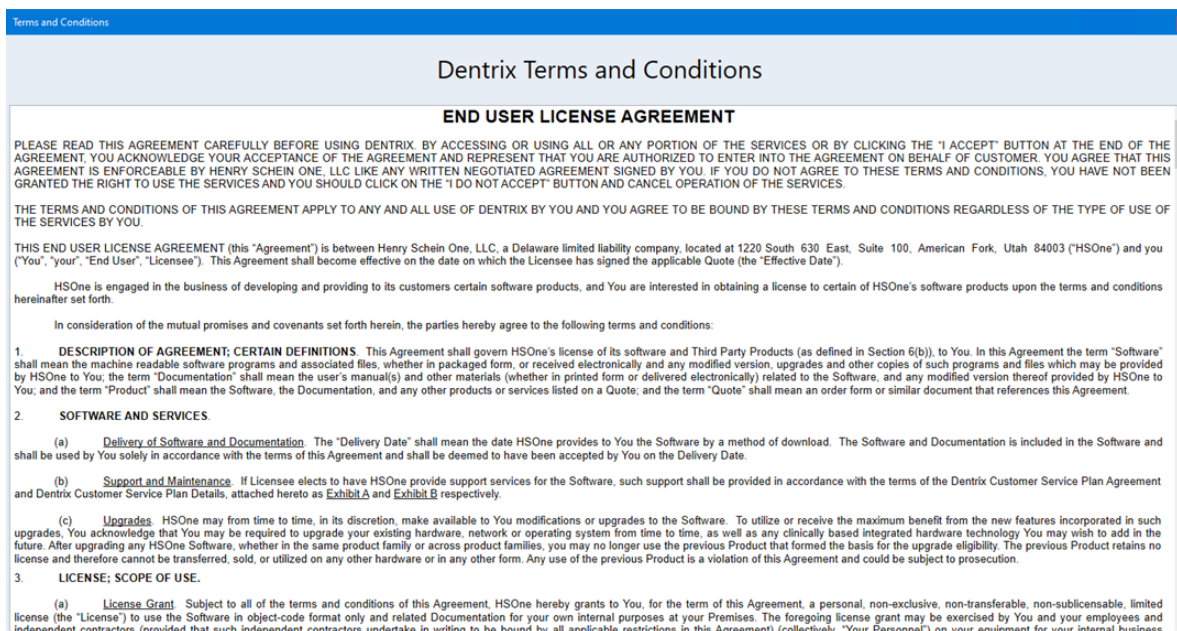
Note: If you have already opened a Dentrix module, in the Help menu of any Dentrix module, click **About Dentrix**, and then in the **About Dentrix** dialog box, click the **Terms and Conditions** button.

The Dentrix - What's New dialog box appears.



2. Click Dentrix End User License Agreement.

The **Terms and Conditions** disclaimer appears.



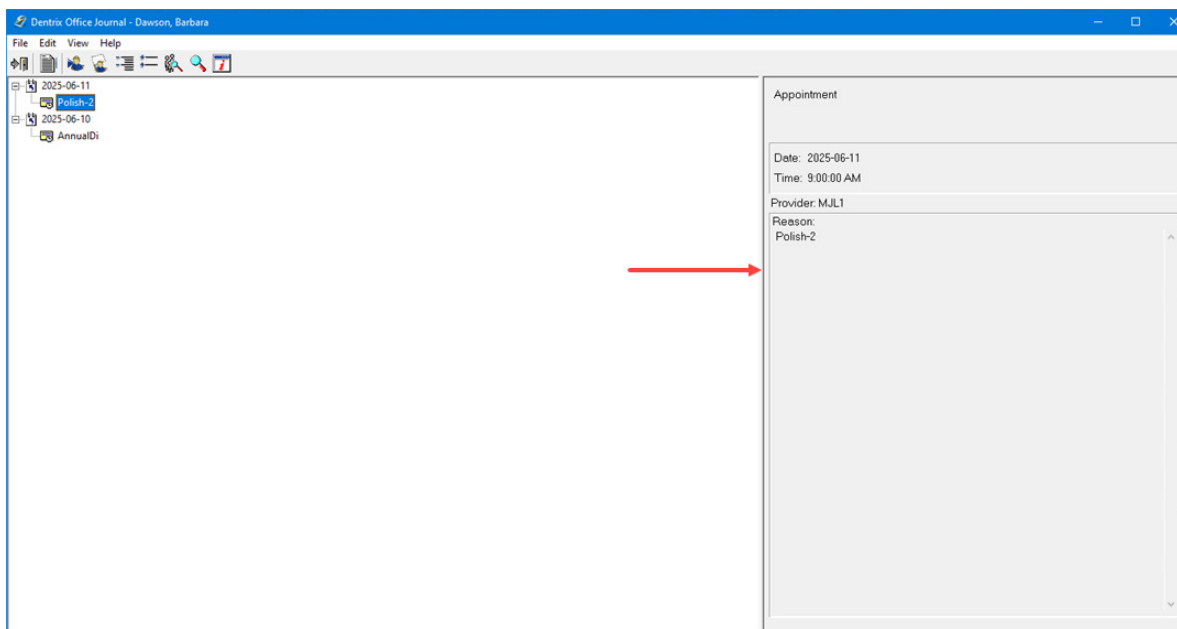
Resizing the Office Journal Info Panel

The Info panel in the Office Journal was modified allowing you to resize it.

To resize the Office Journal info panel

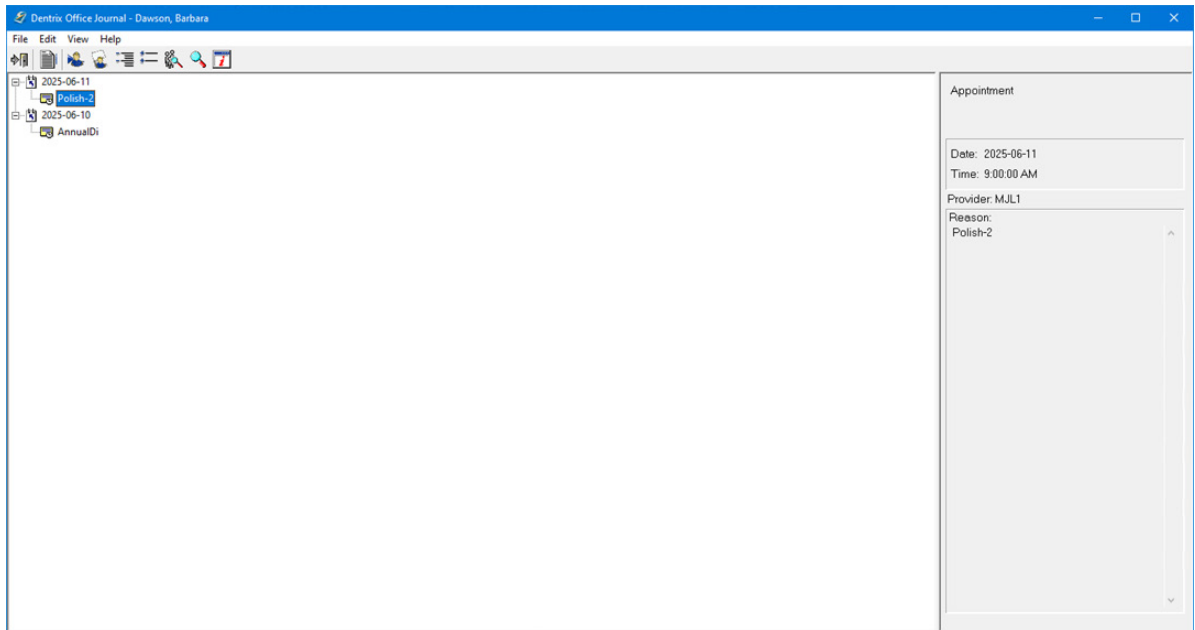
- From any Dentrix module except the Office Manager, open the Office Journal.

The Office Journal window appears.



Note: If necessary, click the Show Info toolbar button to open the Info panel.

2. Click the separator line, and then drag the line to the left to increase or to the right to decrease the size of the Info panel.



Note: When you next open the Office Journal, the Info panel will remain sized the way you modified it.

Dentrix 25.12 Canada

Overview and New Features

This Dentrix 25.12 Canada Release Guide provides information about the Dentrix 25.12 Canada 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 25.12 Canada.

Note: For information about using the new features in Dentrix 25.12 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.12 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.12 Canada includes the following enhancements:

THE REDESIGNED FAMILY FILE WINDOW

The redesigned Family File window is now available for all Beta offices to view and try out. We invite your feedback. You can preview the latest features in this Release Guide:

- You can now add or edit a patient’s emergency contact information from the **Emergency Contact** card.
- The new **Upcoming Appointments** card shows the patient’s next two upcoming appointments.
- You can now view and revert any updates from Dentrix Forms to the fields in the **Patient Information** card.

MISCELLANEOUS

- In the Treatment Planner, you can now select the reason a procedure was rejected from a menu, and a **Reason** column now appears in the **Case Status History** table.
- The **Birthday** field in the **Add New Patient** dialog box now uses the Microsoft Windows short date format.

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 features and enhancements, refer to the Dentrix Help.

Previewing the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. You can preview the proposed changes.

Note: Currently, the new Family File window consists of several cards (Contact Information, Patient Information, Continuing Care, Primary Dental Insurance, Notes, Billing Information, and so on).

To preview the redesigned Family File

1. Open the Family File and select a patient.

Dentrix Family File - Murray, James

File Edit Help

Name: Murray, James
Address: 723 Oak Lane
 Calgary, AB T2P-9K8
Phone: M (746)555-0982
Status: Non-Pat, M, Married, Guar, H-of-H
Consent: 2025-02-04
First Visit:
Last Visit:
Missed Appt:
Chart #:
SIN:
DL#:
Birthday: 1995-10-13, 29
Provider: JLD1
Fee Sched: <Prov Default>
E-Mail: jmmurray@email.com

Health History **Employer** **Cont. Care**

Primary Dental Insurance
Company:
Group Plan:
Group #:
Fee Sched:
Coverage: 0.00
Ded. S/P/O: 0/0/0
Other Max:
Used: 0.00
Met: 0/0/0

Patient Notes
 (No Note)

0-->30	31-->60	61-->90	91-->	Balance
0.00	0.00	0.00	0.00	0.00

Payment Amt: NA **Amt Past Due:** NA
Bill Type: 1 **Last Payment:** 0.00

Referred By
 Dacro, Jack 2025-02-04

Referred To

Status	Name	Position	Gender	Patient	Birthday
HofH Guar	Murray, James	Married	Male	No	1995-10-13
	Murray, Jenny	Married	Female	No	1996-06-02

2. Click **File**, point to **Switch To**, and then click **Preview New Family File**.

The new Family File window appears.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member

Nathalie J Allard

Patient

Health History

?

Contact Information

Home Phone # (514)555-8596

Work Phone # (514)555-4985

Email -

Address 4253 Wilson Ave., Montreal

Patient Information

Chart # -

Gender Female

Birthday 2006-04-01, 19

SIN 595-745-856

Provider MJL1

Fee Schedule <Prov Default>

DL # -

HofH / Guarantor Yes

Insurance Subscriber Yes

Position Single

Continuing Care

There is no continuing care information on file for this patient.

Add Continuing Care

Primary Dental Insurance < 1 dental >

Details

Company Zurich

Group Plan Y M C A

Group # 44587

Fee Schedule -

Coverage 2500.00

Used 0.00

Ded S/P/O 0/0/0

Met 0/0/0

Other Coverage -

Notes

Show Notes

Notes are Hidden

Click "Show Notes" to see any notes on file.

Billing Information

Payment Amount -

Amount Past Due -

Billing Type 3

Last Payment 9.45

Aging Schedule

0 → 30	31 → 60	61 → 90	91 →	Balance
0.00	0.00	0.00	0.00	0.00

ADDING OR EDITING A PATIENT'S EMERGENCY CONTACT INFORMATION

You can now add and edit a patient's emergency contact information from the new Family File window.

To add or edit a patient's emergency contact information

1. Open the new Family File.

2. Click the Edit icon in the upper-right corner of the **Emergency Contact** card.

The **Select from Family Emergency Contacts** dialog box appears.

Select from Family Emergency Contacts

Current Contact:

Emergency Contact:

Name

Phone number

Emergency Contact's Relationship to patient:

New

Edit

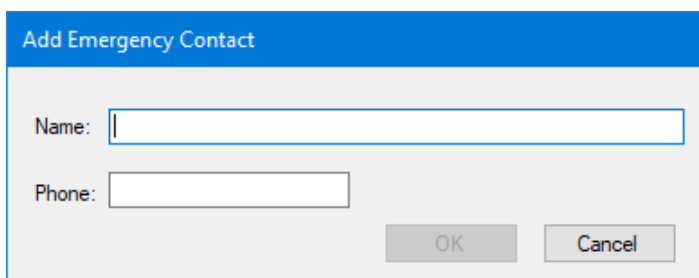
Remove

OK

Cancel

3. To create an emergency contact, click **New**.

The **Add Emergency Contact** dialog box appears.

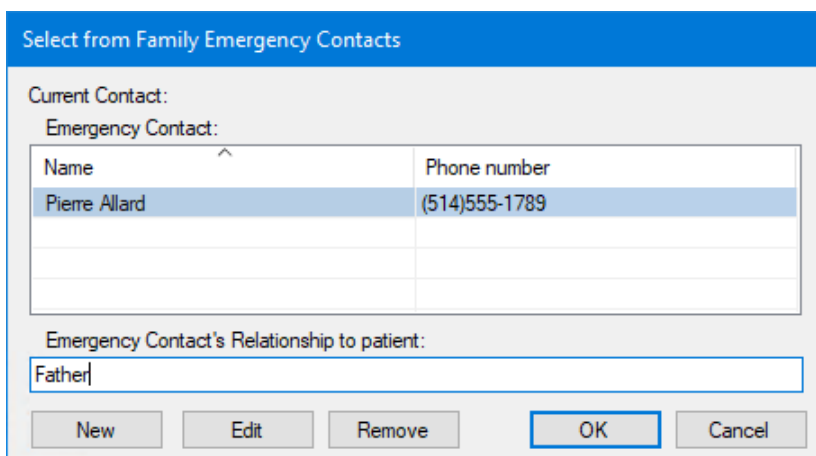


Add Emergency Contact

Name:

Phone:

4. Type the contact's name and phone number, and then click **OK**.
The **Select from Family Emergency Contacts** dialog box reappears.



Select from Family Emergency Contacts

Current Contact:

Emergency Contact:

Name	Phone number
Pierre Allard	(514)555-1789

Emergency Contact's Relationship to patient:

Father

5. Under **Emergency Contact's Relationship to patient**, type the kind of relationship, and then click **OK**.
The emergency contact's information appears in the Health History window.

VIEWING A PATIENT'S UPCOMING APPOINTMENTS

You can view a patient's next two upcoming appointments.

To view upcoming appointments

1. Open the new Family File.
2. Navigate to the **Upcoming Appointments** card.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member

Ken S Abbott ▾

Patient HEALTH HISTORY ?

- Wed - Jun 4, 2025 -
Patient has been observed to come overly well dressed.
This is an internal note to all staff: do NOT engage in etiquette conversation with him. He'll coerce you to wear a tuxedo to work, which makes putting scrubs really difficult.
Ask me how I know.

Payment Amount: - Amount Past Due: - Billing Type: 4 ⓘ Last Payment: 0.00

Aging Schedule

0 → 30	31 → 60	61 → 90	91 →	Balance
0.00	0.00	0.00	0.00	0.00

Appointment Details ⓘ

First Visit: 03/05/2022 Last Visit: 03/05/2022
Next Visit: 06/05/2025 Missed Appointments: 0 Missed, 0 Broken

Emergency Contact ⓘ

Contact Name: Someone Relationship:
Phone #: (555)555-5332

Employer ⓘ

AT&T

Upcoming Appointments

Day	Time	Description	Provider
06/05/2025	8:00 AM	DiagCasts	DDS1
06/06/2025	8:00 AM	PntcPrCer# 3	DDS1

Referrals ⓘ

Referral Type	Individual or Source	Date of Referral
Referred By		
Patient	Dr. Lisa Farrer	06/04/2025
Referred To		
Doctor / Other	Dr. Robert S Clark	06/04/2025

Setting Rejection Reasons in the Treatment Planner

You can now set the reason a patient rejected a treatment plan in the Treatment Planner.

To set the reason for rejecting a treatment plan

1. In the Treatment Planner, select the desired treatment plan.

Dentrix Treatment Planner - Allard, Nathalie J (Nat)

File Edit Options View Insurance Help

Treatment Plan Case Setup

Created
Printed
PreAuth (Prim)
PreAuth (Sec)
Follow-Up Made
Referred
Proposed
Accepted
Rejected
Completed

☐ Include Com
☒ Include Reje

Treatment
Insurance/Case Amounts
Supporting Information
Case Status History
Case Presentation Setup
Settings

Case Status: Created: 2025-06-24 Case Severity

Visit 1

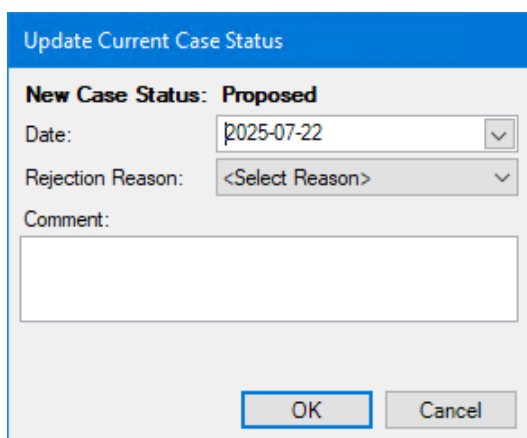
Code	Th	Surf	Description	Fee	Pat. Port
27211	36		Crown restoration made of porcelain fused to noble metal	438.38	438.

Primary Insurance:
The procedure is not covered by insurance. Estimate = 0.00

Secondary Insurance:
No secondary insurance coverage. Estimate = 0.00

- Click the Update Case Status toolbar button, and then from the menu, click **Rejected**.

The Update Current Case Status dialog box appears.



Update Current Case Status

New Case Status: Proposed

Date: 2025-07-22

Rejection Reason: <Select Reason>

Comment:

OK Cancel

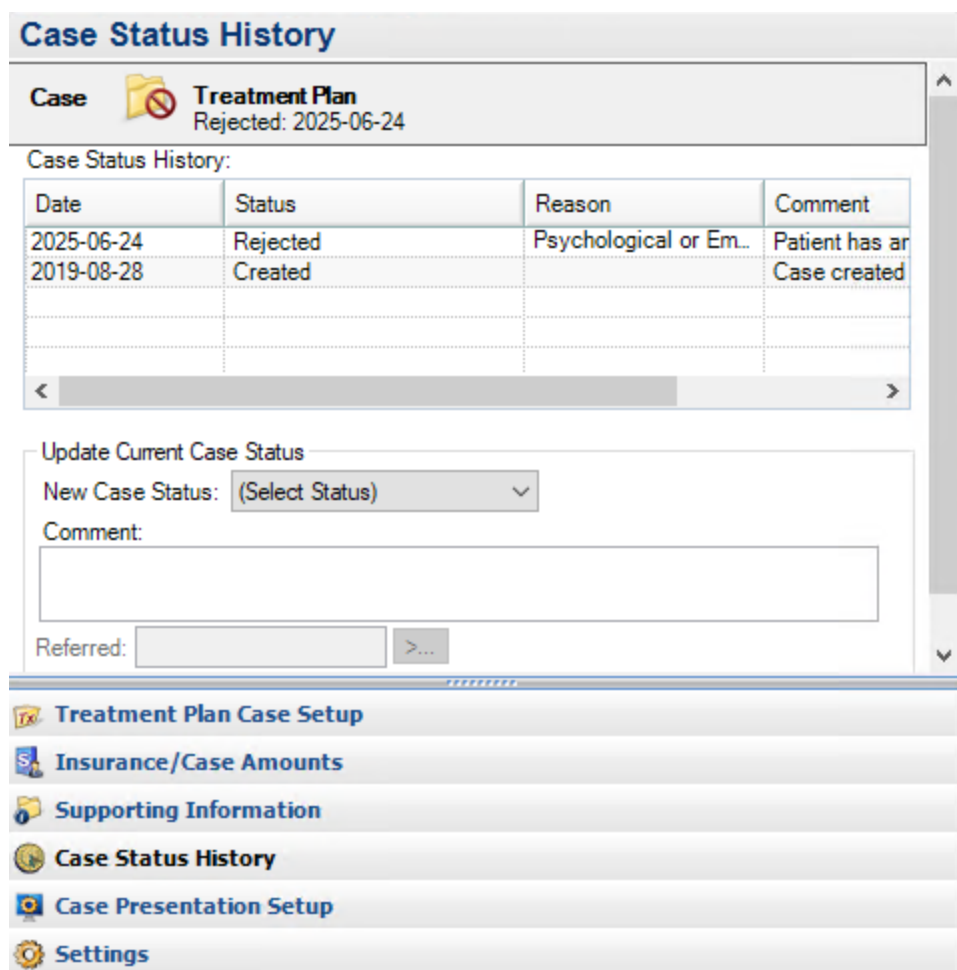
- From the Rejection Reason menu, select the desired option, type a comment, and then click **OK**.

- Select **Include Rejected Cases**.


Any rejected treatment plans appear under **Treatment Plan Case Setup**.

- Select the desired rejected plan, click the **Case Status History** tab, and then click the Refresh toolbar button.

The reason for the rejection appears in the **Reason** column.



Case Status History

Case  **Treatment Plan**
Rejected: 2025-06-24

Case Status History:

Date	Status	Reason	Comment
2025-06-24	Rejected	Psychological or Em...	Patient has ar
2019-08-28	Created		Case created

Update Current Case Status

New Case Status: (Select Status)

Comment:

Referred: >...

Treatment Plan Case Setup

Insurance/Case Amounts

Supporting Information

Case Status History

Case Presentation Setup

Settings

Dentrix 25.11 Canada

Overview and New Features

This Dentrix 25.11 Canada Release Guide provides information about the Dentrix 25.11 Canada 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 25.11 Canada.

Note: For information about using the new features in Dentrix 25.11 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.11 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.11 Canada includes the following enhancements:

THE REDESIGNED FAMILY FILE WINDOW

The redesigned Family File window is now available for all Beta offices to view and try out. We invite your feedback. You can preview the latest features in this Release Guide:

- You can now add or edit a patient’s emergency contact information from the **Emergency Contact** card.
- The new **Upcoming Appointments** card shows the patient’s next two upcoming appointments.
- You can now navigate through the Family File controls with the Tab key.

CLAIMS MANAGER

- The Dentrix Claims Manager is now available to help you view the details of claims, add and/or edit claim statuses, and view information about a patient or an insurance plan.

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 features and enhancements, refer to the Dentrix Help.

Previewing the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. You can preview the proposed changes.

Note: Currently, the new Family File window consists of several cards (Contact Information, Patient Information, Continuing Care, Primary Dental Insurance, Notes, Billing Information, and so on).

To preview the redesigned Family File

1. Open the Family File and select a patient.

Dentrix Family File - Murray, James

File Edit Help

Name: Murray, James
Address: 723 Oak Lane
 Calgary, AB T2P-9K8
Phone: M (746)555-0982
Status: Non-Pat, M, Married, Guar, H-of-H
Consent: 2025-02-04
First Visit:
Last Visit:
Missed Appt:
E-Mail: jmmurray@email.com
Chart #:
SIN:
DL#:
Birthday: 1995-10-13, 29
Provider: JLD1
Fee Sched: <Prov Default>

Health History **Employer** **Cont. Care**

Primary Dental Insurance
Company:
Group Plan:
Group #:
Fee Sched:
Coverage: 0.00
Ded. S/P/O: 0/0/0
Other Max:
Used: 0.00
Met: 0/0/0

Patient Notes
 (No Note)

0-->30	31-->60	61-->90	91-->	Balance
0.00	0.00	0.00	0.00	0.00

Payment Amt: NA **Amt Past Due:** NA
Bill Type: 1 **Last Payment:** 0.00

Referred By
 Dacro, Jack 2025-02-04

Referred To

Status	Name	Position	Gender	Patient	Birthday
HofH Guar	Murray, James	Married	Male	No	1995-10-13
	Murray, Jenny	Married	Female	No	1996-06-02

2. Click **File**, point to **Switch To**, and then click **Preview New Family File**.

The new Family File window appears.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member

Nathalie J Allard

Patient

Health History

?

Contact Information

Home Phone # (514)555-8596

Work Phone # (514)555-4985

Email -

Address 4253 Wilson Ave., Montreal

Patient Information

Chart # -

Gender Female

Birthday 2006-04-01, 19

SIN 595-745-856

Provider MJL1

Fee Schedule <Prov Default>

DL # -

HofH / Guarantor Yes

Insurance Subscriber Yes

Position Single

Continuing Care

There is no continuing care information on file for this patient.

Add Continuing Care

Primary Dental Insurance < 1 dental >

Details

Company Zurich

Group Plan Y M C A

Group # 44587

Fee Schedule -

Coverage 2500.00

Used 0.00

Ded S/P/O 0/0/0

Met 0/0/0

Other Coverage -

Notes

Show Notes

Notes are Hidden

Click "Show Notes" to see any notes on file.

Billing Information

Payment Amount -

Amount Past Due -

Billing Type 3

Last Payment 9.45

Aging Schedule

0 → 30	31 → 60	61 → 90	91 →	Balance
0.00	0.00	0.00	0.00	0.00

ADDING OR EDITING A PATIENT'S EMERGENCY CONTACT INFORMATION

You can now add and edit a patient's emergency contact information from the new Family File window.

To add or edit a patient's emergency contact information

1. Open the new Family File.

2. Click the Edit icon in the upper-right corner of the **Emergency Contact** card.
- The **Select from Family Emergency Contacts** dialog box appears.

Select from Family Emergency Contacts

Current Contact:

Emergency Contact:

Name

Phone number

Emergency Contact's Relationship to patient:

New

Edit

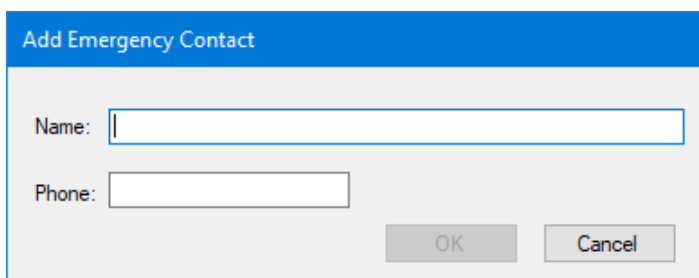
Remove

OK

Cancel

3. To create an emergency contact, click **New**.

The **Add Emergency Contact** dialog box appears.

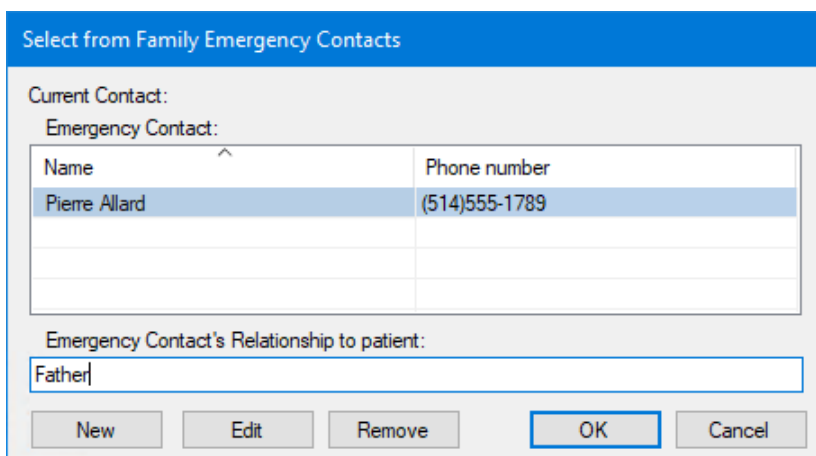


Add Emergency Contact

Name:

Phone:

4. Type the contact's name and phone number, and then click **OK**.
The **Select from Family Emergency Contacts** dialog box reappears.



Select from Family Emergency Contacts

Current Contact:

Emergency Contact:

Name	Phone number
Pierre Allard	(514)555-1789

Emergency Contact's Relationship to patient:

5. Under **Emergency Contact's Relationship to patient**, type the kind of relationship, and then click **OK**.
The emergency contact's information appears in the Health History window.

VIEWING A PATIENT'S UPCOMING APPOINTMENTS

You can view a patient's next two upcoming appointments.

To view upcoming appointments

1. Open the new Family File.
2. Navigate to the **Upcoming Appointments** card.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member
Ken S Abbott ▾

Patient HEALTH HISTORY ?

- Wed - Jun 4, 2025 -
Patient has been observed to come overly well dressed.
This is an internal note to all staff: do NOT engage in etiquette conversation with him. He'll coerce you to wear a tuxedo to work, which makes putting scrubs really difficult.
Ask me how I know.

Payment Amount Amount Past Due Billing Type Last Payment
- - 4 0.00

Aging Schedule

0 → 30	31 → 60	61 → 90	91 →	Balance
0.00	0.00	0.00	0.00	0.00

Appointment Details ✎

First Visit	Last Visit
03/05/2022	03/05/2022
Next Visit	Missed Appointments
06/05/2025	0 Missed, 0 Broken

Upcoming Appointments

Day	Time	Description	Provider
06/05/2025	8:00 AM	DiagCasts	DDS1
06/06/2025	8:00 AM	PntcPrCer# 3	DDS1

Emergency Contact ✎

Contact Name	Relationship
Someone	
Phone #	
(555)555-5332	

Referrals ✎

Referral Type	Individual or Source	Date of Referral
Referred By		
Patient	Dr. Lisa Farrer	06/04/2025
Referred To		
Doctor / Other	Dr. Robert S Clark	06/04/2025

Employer ✎

AT&T

NAVIGATING FAMILY FILE CONTROLS WITH THE TAB KEY

You can navigate the Family File controls with the Tab key.

To navigate the Family File controls

1. Open the new Family File.
2. Press the Tab key.

A box appears around the control.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member
Barbara Dawson ▾

Patient Health History ?

Contact Information ✎

Mobile Phone #	Home Phone #
-	(604)555-5635
Email	
-	
Address	
258 Cedarville Road, Apt 203	

Patient Information ✎

Chart #	Gender	Birthday	SIN
-	Female	1962-12-26, 62	-
Provider	Fee Schedule	DL #	HofH / Guarantor
MJL1, MHY1	<Prov Default>	-	No
Insurance Subscriber	Position		
No	Married		

3. Press the Tab key again to move to the next control.

Claims Manager

Using the Claims Manager, you can view all claims and sort or search them by status. The Claims Manager also features an interactive aging report.

To open the Claims Manager

1. In the Ledger or the Office Manager, click the Claims Manager toolbar button.

The Claims Manager window appears.

Beta version: some information(*) may not populate.

Patient Information

Chart Family File Ledger Document Center Insurance Data Benefits and Coverage

Type: Primary/Dental Treatment Date: 2015-02-17
 Current Status: Created Sent Date: N/A
 EOB Received: No Age (days): N/A

Patient: Young, David DOB: 1991-04-10
 Subscriber: Young, Stephen Subscriber ID: 452169587
 Billing Provider: JLD1 Davidson, James L Billing Unique #: 0678765500

Insurance: Manulife Carrier ID: 123456
 Carrier Phone: (306)458-1258 Claim Sequence #:

Procedures: Billed Amount: 818.40

Date	Procedure	Fee	Tooth/Surface	Ins Paid
2015-02-17	01202	37.96		0.00
2015-02-17	12101	18.03		0.00
2015-02-17	11101	36.07		0.00

Attachments - None

Claim Status Notes: Add/Edit Status

Date	Status	Notes
------	--------	-------

Claims Loaded: 2

2. To view more claims, adjust the date range under **Sent Date** by typing the desired range in the **From** and **To** text boxes, or by clicking the respective calendar icons and selecting a date range.

Note: You can also search for claims by the following data points: **Sent**, **Last Updated**, **Patient Name**, **Carrier Name**, **Status**, or **Age**.

All claims in the date range appear.

Dentrax Claims Manager

Refresh Copy to Clipboard

Appointments Office Manager Collections Manager Pmt Agreement Manager Resource Center

Sent Date: 2025-05-23 - 2025-06-06 Search Columns

Sent/Batched	Last Updated	Patient Name	Carrier Name	Status	Pre-Auth	EOB
N/A	N/A	Young, David	Manulife	Created		No
N/A	2024-12-09	Dawson, Barbara	Canada Life	Created		No

Claims Loaded: 2

Beta version: some information(*) may not populate.

Patient Information

Chart Family File Ledger Document Center Insurance Data Benefits and Coverage

Type: Primary/Dental Treatment Date: 2024-12-09
 Current Status: Created Sent Date: N/A
 EOB Received: No Age (days): N/A

Patient: Dawson, Barbara DOB: 1962-12-26
 Subscriber: Dawson, Brian Subscriber ID: 65829
 Billing Provider: MJL1 Lang, Michael J Billing Unique #: 067289200
 Insurance: Canada Life Carrier ID: 000014
 Carrier Phone: (604)525-5653 Claim Sequence #:

Procedures: Billed Amount: 56.94

Date	Procedure	Fee	Tooth/Surface	Ins Paid
2024-12-09	01103	56.94		0.00

Attachments:

Date Sent: 2024-12-09 Type: Periodontal Charts (2), Support Data for Claim, Radiology Films

Attachment Status:

Attachment ID	Status	Notes

Claim Status Notes: Add/Edit Status

Date	Status	Notes
2024-12-09	Created	

- To view a specific claim, select it from the list.
The details of the selected claim appear, including Procedures, Attachments, and Claim Status Notes.
- To add or edit a Claim Status Note, select a patient from the claims list.

Dentrax Claims Manager

Refresh Copy to Clipboard

Appointments Office Manager Collections Manager Pmt Agreement Manager Resource Center

Sent Date: 2025-05-23 - 2025-06-06 Search Columns

Sent/Batched	Last Updated	Patient Name	Carrier Name	Status	Pre-Auth	EOB
N/A	N/A	Young, David	Manulife	Created		No
N/A	2024-12-09	Dawson, Barbara	Canada Life	Created		No

Claims Loaded: 2

Beta version: some information(*) may not populate.

Patient Information

Chart Family File Ledger Document Center Insurance Data Benefits and Coverage

Type: Primary/Dental Treatment Date: 2024-12-09
 Current Status: Created Sent Date: N/A
 EOB Received: No Age (days): N/A

Patient: Dawson, Barbara DOB: 1962-12-26
 Subscriber: Dawson, Brian Subscriber ID: 65829
 Billing Provider: MJL1 Lang, Michael J Billing Unique #: 067289200
 Insurance: Canada Life Carrier ID: 000014
 Carrier Phone: (604)525-5653 Claim Sequence #:

Procedures: Billed Amount: 56.94

Date	Procedure	Fee	Tooth/Surface	Ins Paid
2024-12-09	01103	56.94		0.00

Attachments:

Date Sent: 2024-12-09 Type: Periodontal Charts (2), Support Data for Claim, Radiology Films

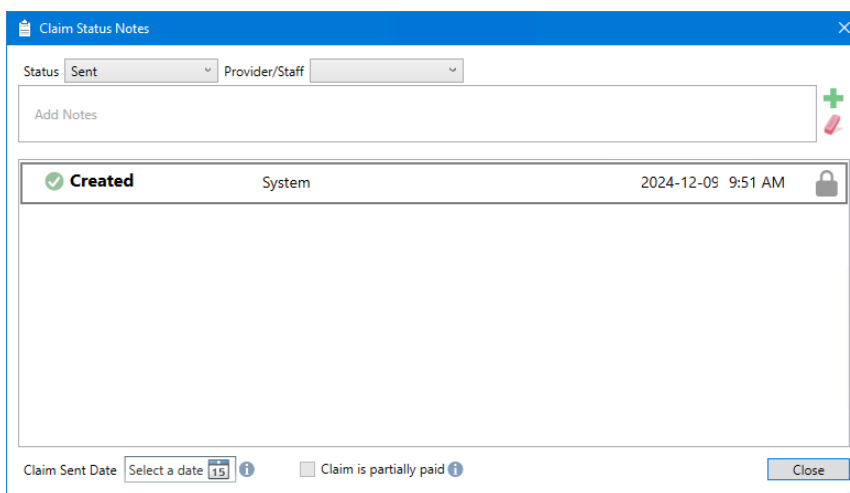
Attachment Status:

Attachment ID	Status	Notes

Claim Status Notes: Add/Edit Status

Date	Status	Notes
2024-12-09	Created	

- Under Patient Information, click Add/Edit Status.
The Claim Status Notes dialog box appears.



Claim Status Notes

Status: **Sent** Provider/Staff:

Add Notes

Created System 2024-12-09 9:51 AM

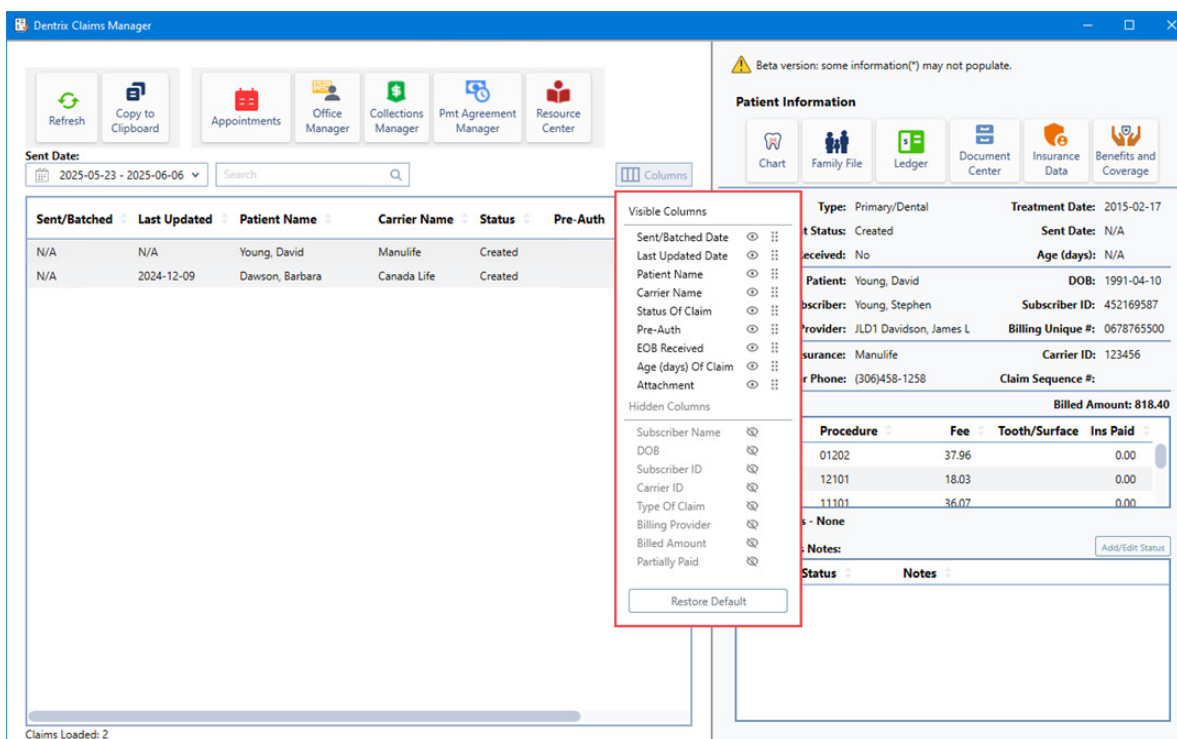
Claim Sent Date: Select a date **15** ☐ Claim is partially paid

Close

6. Do one of the following:
 - To add a note, type the note in the **Add Notes** text box.
 - To edit a note, select it, and then click the Edit Note button.

7. To change the listed columns, click **Columns**.

A list of the visible and hidden columns appears.



Dentrix Claims Manager

Beta version: some information(*) may not populate.

Patient Information

Chart Family File Ledger Document Center Insurance Data Benefits and Coverage

Sent Date: 2025-05-23 - 2025-06-06 Search

Columns

Sent/Batched	Last Updated	Patient Name	Carrier Name	Status	Pre-Auth
N/A	N/A	Young, David	Manulife	Created	
N/A	2024-12-09	Dawson, Barbara	Canada Life	Created	

Visible Columns

- Sent/Batched Date
- Last Updated Date
- Patient Name
- Carrier Name
- Status Of Claim
- Pre-Auth
- EOB Received
- Age (days) Of Claim
- Attachment

Hidden Columns

- Subscriber Name
- DOB
- Subscriber ID
- Carrier ID
- Type Of Claim
- Billing Provider
- Billed Amount
- Partially Paid

Restore Default

Type: Primary/Dental **Treatment Date:** 2015-02-17

Status: Created **Sent Date:** N/A

Received: No **Age (days):** N/A

Patient: Young, David **DOB:** 1991-04-10

Subscriber: Young, Stephen **Subscriber ID:** 452169587

Provider: JLD1 Davidson, James L **Billing Unique #:** 0678765500

Insurance: Manulife **Carrier ID:** 123456

Phone: (306)458-1258 **Claim Sequence #:**

Billed Amount: 818.40

Procedure	Fee	Tooth/Surface	Ins Paid
01202	37.96		0.00
12101	18.03		0.00
11101	36.07		0.00

Notes:

Status: **Notes**

Claims Loaded: 2

8. To make a column visible, under **Hidden Columns**, click the icon to the right of the desired column name.
The column appears in **Visible Columns** and the claims list.
9. To hide a column, under **Visible Columns**, click the icon to the immediate right of the desired column name.
10. To rearrange the columns in the claims list, click the column name or the six dot icon corresponding to the name and drag the column to the desired location.
The order of the columns in the claims list changes.

Dentrix 25.10 Canada

Overview and New Features

This Dentrix 25.10 Canada Release Guide provides information about the Dentrix 25.10 Canada 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 25.10 Canada.

Note: For information about using the new features in Dentrix 25.10 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.10 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.10 Canada includes the following enhancements:

THE REDESIGNED FAMILY FILE WINDOW

The redesigned Family File window is now available for all Beta offices to view and try out. We invite your feedback. You can preview the latest features in this Release Guide:

- You can now view and edit a patient’s emergency contact information.

DENTRIX IMAGING

- A Show/Hide AI Findings button and patient view was added to Big Template Mode and SuperFMX allowing you to toggle between AI findings and patient view across all images.
- A Welcome to Dentrix Imaging video appears when you open Dentrix Imaging providing you with an overview of Dentrix Imaging. A Don’t show this again option was added for those who are not first-time users.
- Dentrix Imaging now supports direct integration with Titanium/KaVo sensors enabling you to acquire images directly without having to rely on third-party setup.
- A pre-populated set of favorite procedures now ensures that you have quick access to essential imaging options.
- The compare mode was modified to display the images that only match the modality that you specified (IOX, IOC, EOX, EOC) and tooth selection.
- In the **Preferences** dialog box, you can now select an option to filter acquisition devices based on DEXIS-equivalent settings to pre-select the appropriate device for intraoral and extraoral X-ray procedures.
- The layout of the Modality View was modified to position elements relative to the x-axis instead of using a fixed-center template.
- The Endo Mode was updated to support a “one tooth series” selection to enhance flexibility for endodontic imaging.
- Code posting options were added for billing selection to ensure integration with Smart Image and posting to the Patient Chart.
- A **Create associated DDX lab case** check box was added for CAD/CAM acquisitions to prevent duplicate codes from being posted to the Patient Chart.
- The **Post codes** and **Apply charges** check boxes were added to prevent duplicate codes and charges from being posted to the Patient Chart.
- Options for posting codes in Dentrix Imaging were removed for when you acquire images through Smart Image to prevent duplicate billing/charges/DDX codes from being posted to the Patient Chart.

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 features and enhancements, refer to the Dentrix Help.

Previewing the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. You can preview the proposed changes.

Note: Currently, the new Family File window consists of several cards (Contact Information, Patient Information, Continuing Care, Primary Dental Insurance, Notes, Billing Information, and so on).

To preview the redesigned Family File

1. Open the Family File and select a patient.

Dentrix Family File - Murray, James

File Edit Help

Name: Murray, James
Address: 723 Oak Lane
 Calgary, AB T2P-9K8
Phone: M (746)555-0982
Status: Non-Pat, M, Married, Guar, H-of-H
Consent: 2025-02-04
First Visit:
Last Visit:
Missed Appt:
E-Mail: jmmurray@email.com
Chart #:
SIN:
DL#:
Birthday: 1995-10-13, 29
Provider: JLD1
Fee Sched: <Prov Default>

Health History **Employer** **Cont. Care**

Primary Dental Insurance
Company:
Group Plan:
Group #:
Fee Sched:
Coverage: 0.00
Ded. S/P/O: 0/0/0
Other Max:
Used: 0.00
Met: 0/0/0

0-->30	31-->60	61-->90	91-->	Balance
0.00	0.00	0.00	0.00	0.00

Payment Amt: NA **Amt Past Due:** NA
Bill Type: 1 **Last Payment:** 0.00

Patient Notes
 (No Note)

Referred By
 Dacro, Jack 2025-02-04

Referred To

Status	Name	Position	Gender	Patient	Birthday
HofH Guar	Murray, James	Married	Male	No	1995-10-13
	Murray, Jenny	Married	Female	No	1996-06-02

2. Click **File**, point to **Switch To**, and then click **Preview New Family File**.

The new Family File window appears.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member

Nathalie J Allard

Patient

Health History

?

Contact Information

Home Phone #
(514)555-8596

Work Phone #
(514)555-4985

Email
-

Address
4253 Wilson Ave., Montreal

Patient Information

Chart #
-

Gender
Female

Birthday
2006-04-01, 19

SIN
595-745-856

Provider
MJL1

Fee Schedule
<Prov Default>

DL #
-

HofH / Guarantor
Yes

Insurance Subscriber
Yes

Position
Single

Continuing Care

There is no continuing care information on file for this patient.

Add Continuing Care

Primary Dental Insurance

< 1 dental >

Details

Company
Zurich

Group Plan
Y M C A

Group #
44587

Fee Schedule
-

Coverage
2500.00

Used
0.00

Ded S/P/O
0/0/0

Met
0/0/0

Other Coverage
-

Notes

Show Notes

Notes are Hidden

Click "Show Notes" to see any notes on file.

Billing Information

Payment Amount
-

Amount Past Due
-

Billing Type
3

Last Payment
9.45

Aging Schedule

0 → 30	31 → 60	61 → 90	91 →	Balance
0.00	0.00	0.00	0.00	0.00

CREATING OR EDITING A PATIENT'S EMERGENCY CONTACT INFORMATION

You can now create and edit a patient's emergency contact information from the new Family File window.

To create or edit a patient's emergency contact information

- 1. Click the Health History button.
The Health History window appears.

Health History - Allard, Nathalie J (Nat)

Medical Conditions

Description	Status	Reported Date	Inactivated Date	Pop-up	Critical	Note
*See Patient Notes	Active	2019-10-28			+	

Allergies

Description	Status	Reported Date	Inactivated Date	Pop-up	Critical	Note

Patient Reported Medications

Description	Status	Reported Date	Inactivated Date	Pop-up	Critical	Note

Prescriptions

Description	Provider	Prescribe Date	NS	eRx

Health History Note Edit Note

Contacts

Emergency Contact: ➤ ✎

Name:
 Relationship:
 Phone:
 Physician Contact: ➤ ✎

Name:
 Specialty:
 Phone:
 Preferred Pharmacy: ➤ ✎

Name:
 Fax:
 Phone:
 Location:
 Health History Questionnaire Forms ☑

Form Name	Response Date

- Under **Contacts**, click the **Emergency Contact** blue chevron.
The **Select from Family Emergency Contacts** dialog box appears.

Select from Family Emergency Contacts

Current Contact:

Emergency Contact:

Name	Phone number

Emergency Contact's Relationship to patient:

New Edit Remove OK Cancel

- To create an emergency contact, click **New**.
The **Add Emergency Contact** dialog box appears.

Add Emergency Contact

Name:

Phone:

OK Cancel

4. Type the contact's name and phone number, and then click **OK**.
The **Select from Family Emergency Contacts** dialog box reappears.

Select from Family Emergency Contacts

Current Contact:

Emergency Contact:

Name	Phone number
Pierre Allard	(514)555-1789

Emergency Contact's Relationship to patient:

Father

5. Under **Emergency Contact's Relationship to patient**, type the kind of relationship, and then click **OK**.
The emergency contact's information appears in the Health History window.
6. Close the Health History window, and navigate to the patient's **Emergency Contact** card in the Family File.

The patient's emergency contact information you entered appears in the card.

Family File

File

for this patient.

Coverage

Coverage	Used	Ded S/P/O	Met
2500.00	0.00	0/0/0	0/0/0

Other Coverage
-

Notes

Notes are Hidden
Click "Show Notes" to see any notes on file.

Billing Information

Payment Amount	Amount Past Due	Billing Type	Last Payment
-	-	3	9.45

Aging Schedule

0 → 30	31 → 60	61 → 90	91 →	Balance
0.00	0.00	0.00	0.00	0.00

Appointment Details

First Visit	Last Visit
2003-02-24	2006-02-08

Next Visit
-

Missed Appointments
0 Missed, 0 Broken

Emergency Contact

Contact Name	Relationship
Pierre Allard	Father

Phone #
(514)555-1789

Referrals

Referral Type	Individual or Source	Date of Referral
Referred To		
Doctor / Other	Dr. Corbett, Janice	2006-09-07
Referred By		
Doctor / Other	Ad.	2003-02-24

Employer

Y.M.C.A.

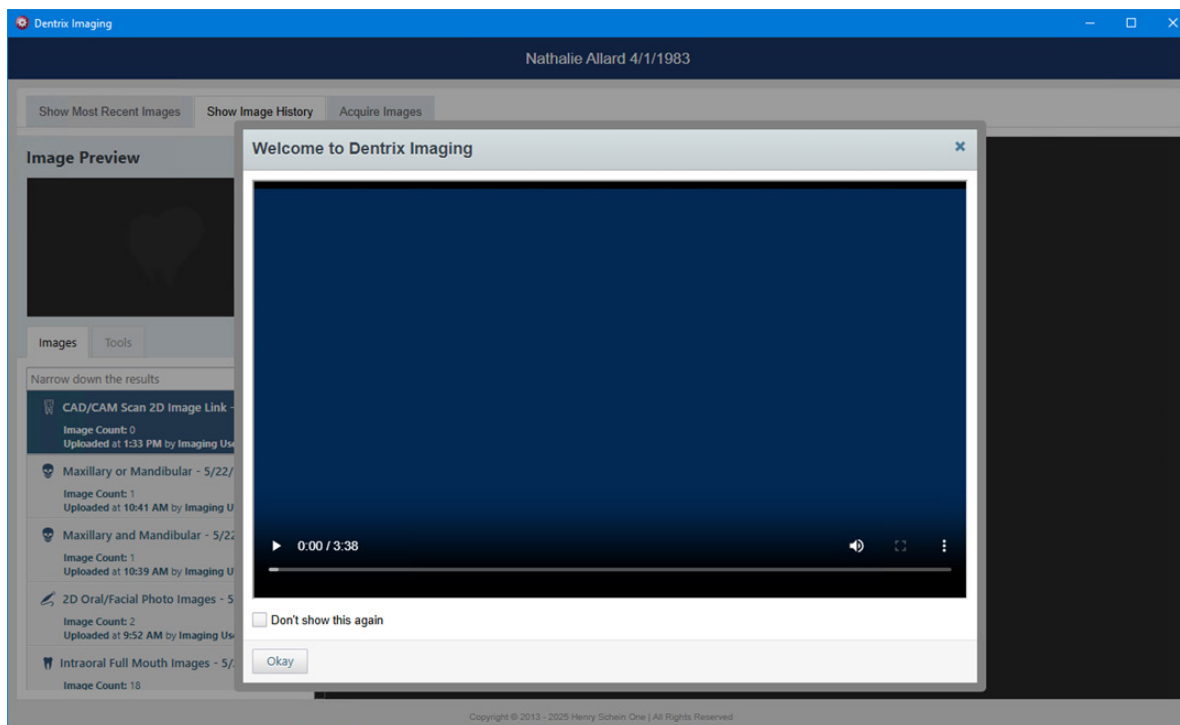
Dentrix Imaging Enhancements

Dentrix Imaging includes several new features and enhancements.

To view the new features and enhancements

1. Open the Patient Chart and select a patient.
2. Click the Launch Dentrix Imaging button in the Smart Image toolbar.

The Dentrix Imaging screen appears.

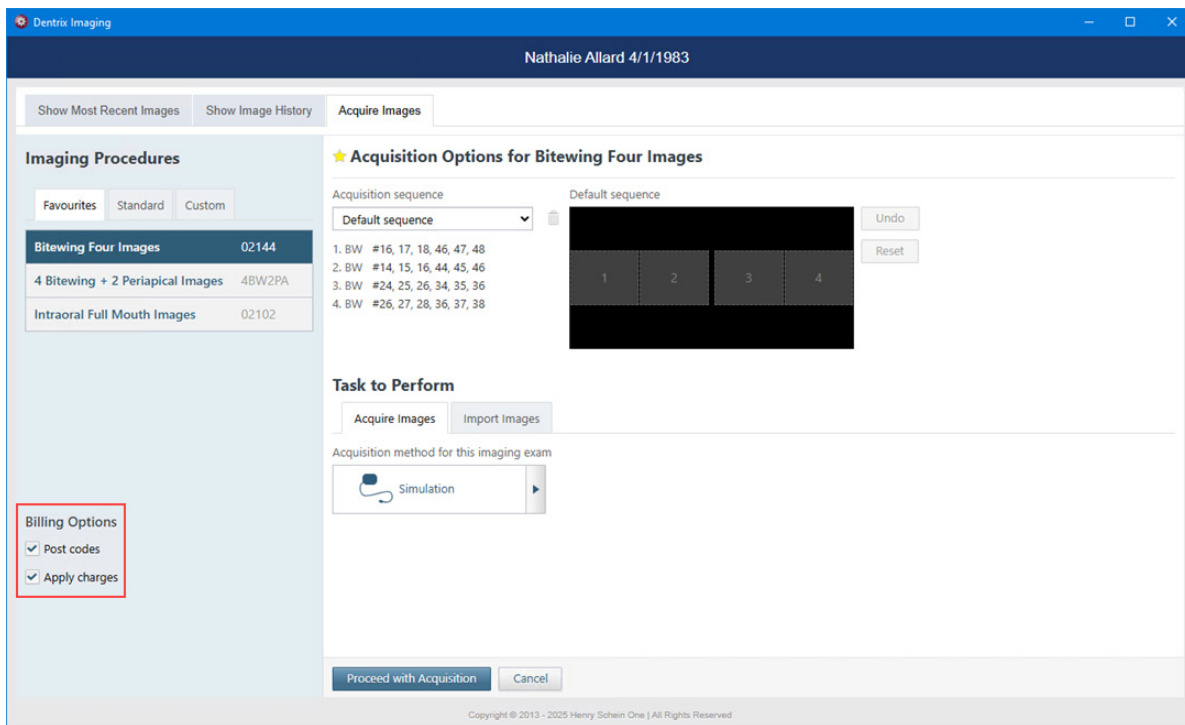


3. Click the Play button to view a brief introduction to Dentrix Imaging.

Note: To prevent the video from appearing the next time you open Dentrix Imaging, select **Don't show this again**, and then close the dialog box.

4. Click the **Acquire Images** tab.

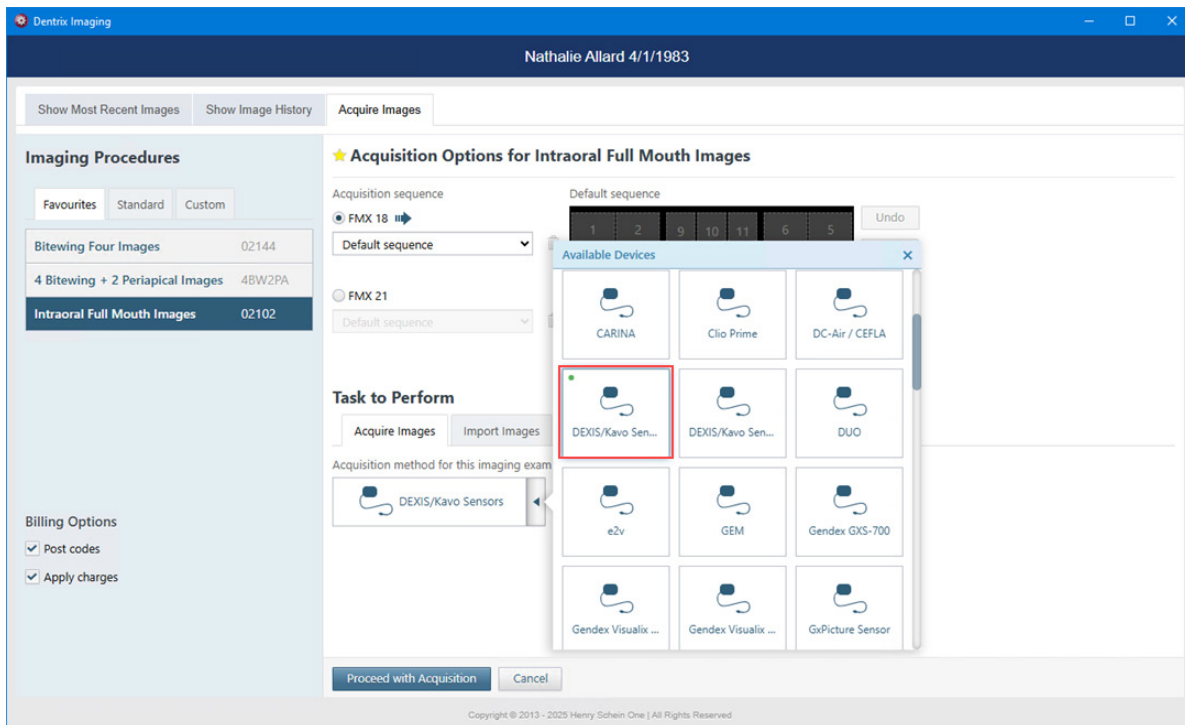
By default, the **Favourites** tab is selected and pre-populated with a set of the most commonly used procedures. Under **Billing Options**, the **Post codes** and **Apply charges** options are selected by default to prevent duplicate codes and charges from being posted to the Patient Chart.



TITANIUM/KAVO DIRECT INTEGRATION

Dentrux Imaging now supports direct integration with Titanium/KaVo sensors enabling you to acquire images directly without having to rely on third-party setup.

1. Open Dentrux Imaging, and then click the **Acquire Images** tab.



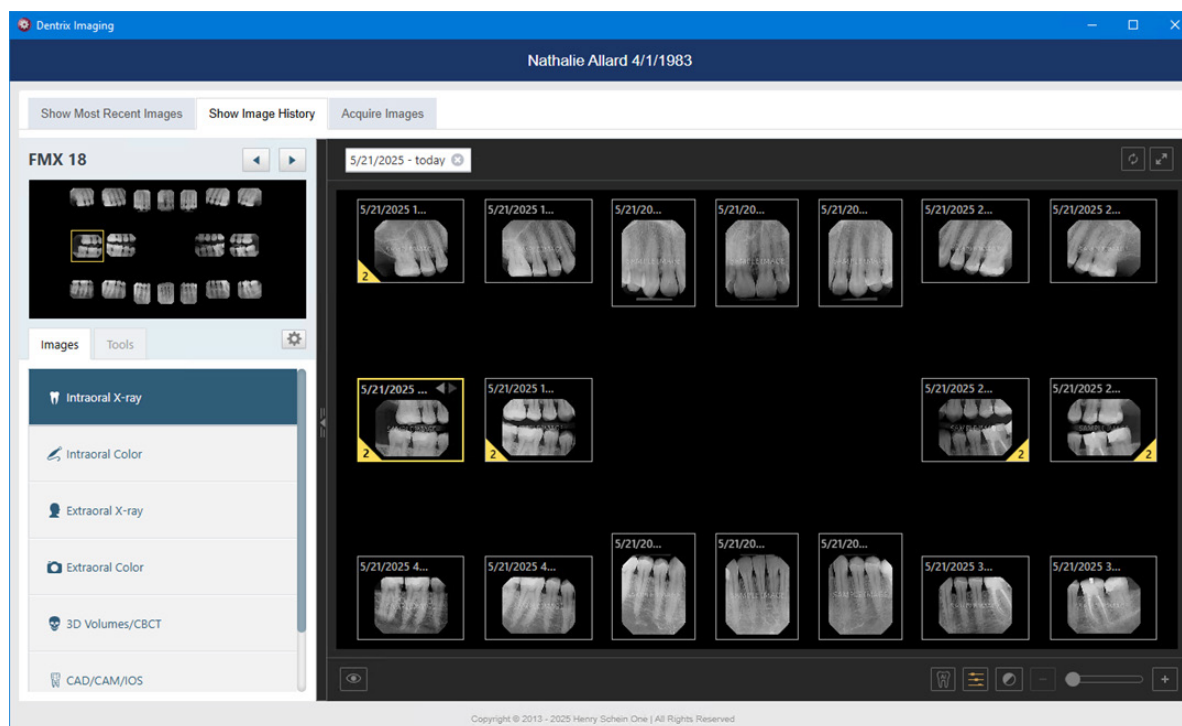
2. From the **Favourites** list, click **Intraoral Full Mouth Images**.
3. From the **Available Devices** menu, click **DEXIS/KaVo Sensors**, and then click **Proceed with Acquisition**.

BIG TEMPLATE/SUPER FMX

The Show/hide AI Findings and Show/hide Patient View buttons were added to the Big Template and Super FMX modes, which allows you to toggle AI findings and Patient view across all images.

1. Open Dentrix Imaging, and then click the **Show Image History** tab.
2. From the **Images** list, select a set of images, click the Settings button, select **Use Modality View** and **Load full size images in templates**, and then click **Confirm**.

Note: The layout of the Modality View now positions elements relative to the x-axis instead of using a fixed-center template.

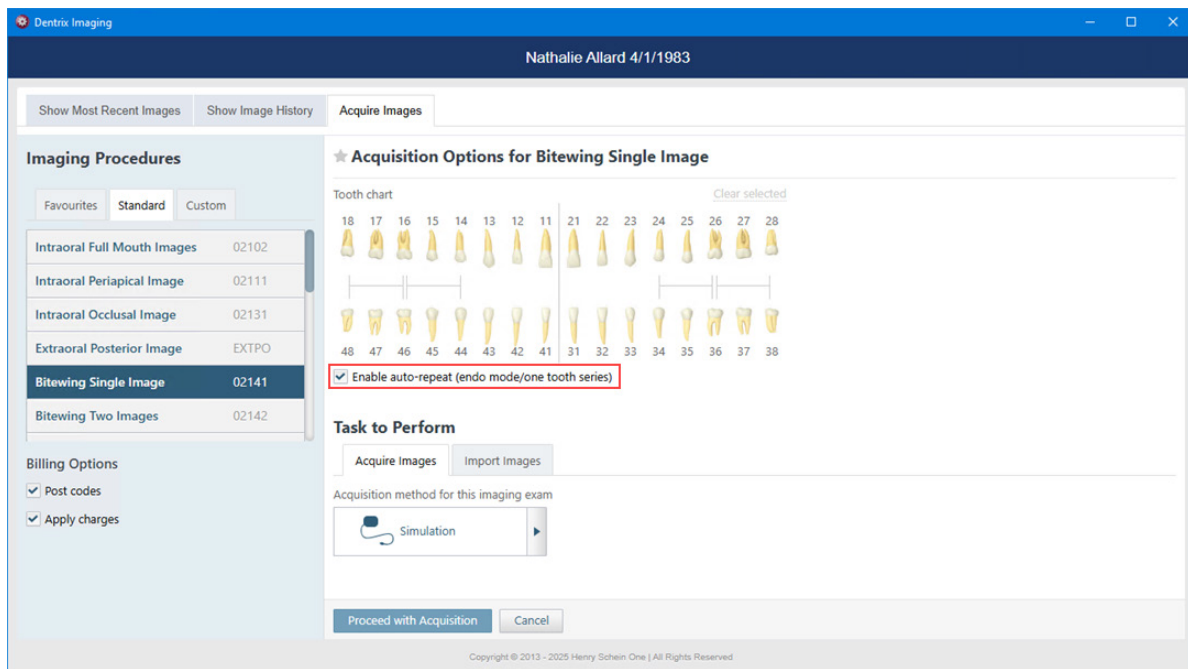


3. Select an image.
The Show/hide AI Findings and Show/hide Patient View buttons appear.

ENDO MODE

The Endo mode now supports “one tooth series,” enhancing flexibility for endodontic imaging.

1. Open Dentrix Imaging, and then click the **Acquire Images** tab.
2. From the **Standard** list, click **Bitewing Single Image**.

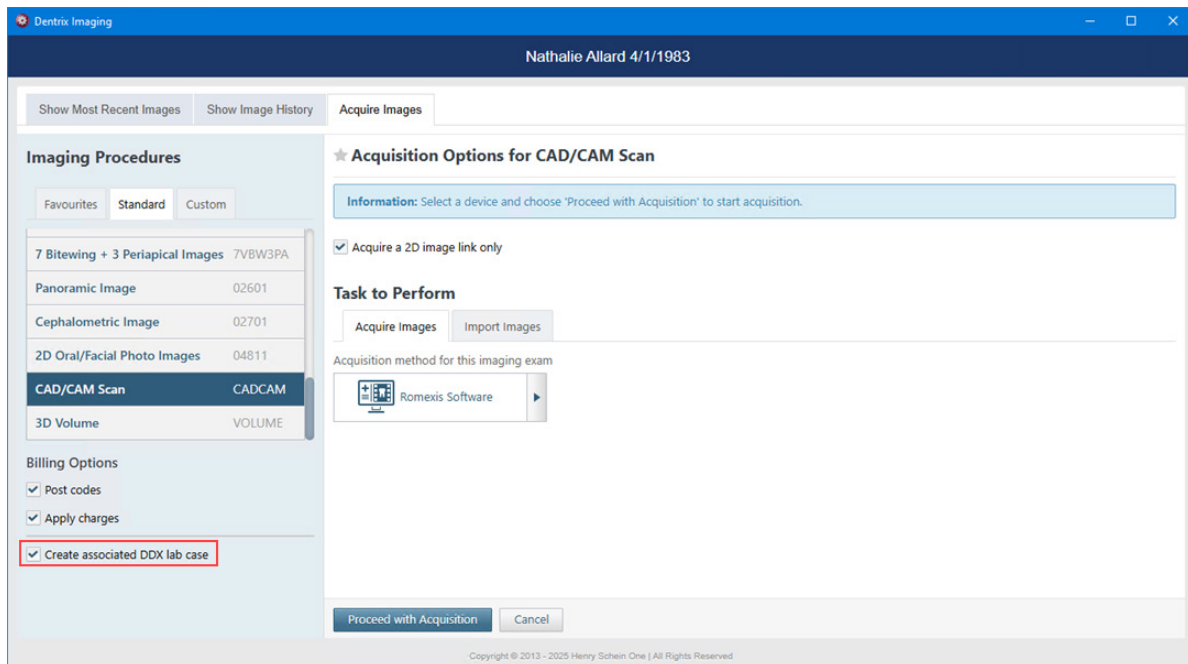


3. From the **Tooth chart**, select the teeth you want to image.
4. Select **Enable auto-repeat (endo mode/one tooth series)**, and then click **Proceed with Acquisition**.

DDX LAB CASE

A **Create associated DDX lab case** check box was added for CAD/CAM acquisitions to ensure that no duplicate codes are posted to the Patient Chart.

1. Open Dentrix Imaging, and then click the **Acquire Images** tab.
2. From the **Standard** list, click **CAD/CAM Scan**.



3. Select **Create associated DDX lab case**.

PREFERENCES

You can now set a preference to filter acquisition devices based on DEXIS-equivalent settings to preselect the appropriate device for intraoral and extraoral X-rays.

1. In the Windows task bar, click the Acquisition Agent icon, and then click **Preferences**.

The **Preferences** dialog box appears.

The screenshot shows the 'Preferences' dialog box with the 'General' tab selected. The 'Filter device list to DEXIS devices' checkbox is checked and highlighted with a red box. Other visible settings include 'Joy Number' set to 0, 'Use Joystick with Generic Camera' unchecked, 'Use still pin with Generic Camera' unchecked, '3D Volume Download Directory' with a 'Download Path' field and 'Browse' button, 'Enable simulation devices' checked, 'Show Log Files' button, 'Grayscale JPEG Compression' section with 'Device' dropdown and 'Use JPEG Compression' unchecked, 'Alternate Button Workflow' section with 'Device' dropdown and 'Use Pause/Capture Workflow' unchecked, 'iTero Settings' button, and the IP address '119.1.9265.16117'. The 'Done' button is at the bottom.

2. Select **Filter device list to DEXIS devices**, and then click **Done**.

Dentrix 25.9 Canada

Overview and New Features

This Dentrix 25.9 Canada Release Guide provides information about the Dentrix 25.9 Canada 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 25.9 Canada.

Note: For information about using the new features in Dentrix 25.9 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.9 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.9 Canada includes the following enhancements:

THE REDESIGNED FAMILY FILE WINDOW

The redesigned Family File window is now available for all Beta offices to view and try out. We invite your feedback. You can preview the latest features in this Release Guide:

- You can now view and reactivate archived patients from the new Family File window.
- You now add an employer to a patient from the new Family File window.
- Whenever a patient’s information is updated in Dentrix Forms, a notification banner now appears under the selected patient’s name.
- You can reverse updates from Dentrix Forms to a patient’s **Contact Information**.

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 features and enhancements, refer to the Dentrix Help.

Previewing the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. You can preview the proposed changes.

Note: Currently, the new Family File window consists of several cards (Contact Information, Patient Information, Continuing Care, Primary Dental Insurance, Notes, Billing Information, and so on).

To preview the redesigned Family File

1. Open the Family File and select a patient.

Dentrix Family File - Murray, James

File Edit Help

Name: Murray, James
Address: 723 Oak Lane
 Calgary, AB T2P-9K8
Phone: M (746)555-0982
Status: Non-Pat, M, Married, Guar, H-of-H
Consent: 2025-02-04
First Visit:
Last Visit:
Missed Appt:
Chart #:
SIN:
DL#:
Birthday: 1995-10-13, 29
Provider: JLD1
Fee Sched: <Prov Default>
E-Mail: jmmurray@email.com

Health History **Employer** **Cont. Care**

Primary Dental Insurance
Company:
Group Plan:
Group #:
Fee Sched:
Coverage: 0.00
Ded. S/P/O: 0/0/0
Other Max:
Used: 0.00
Met: 0/0/0

Patient Notes
 (No Note)

0-->30	31-->60	61-->90	91-->	Balance
0.00	0.00	0.00	0.00	0.00

Payment Amt: NA **Amt Past Due:** NA
Bill Type: 1 **Last Payment:** 0.00

Referred By
 Dacro, Jack 2025-02-04

Referred To

Status	Name	Position	Gender	Patient	Birthday
HofH Guar	Murray, James	Married	Male	No	1995-10-13
	Murray, Jenny	Married	Female	No	1996-06-02

2. Click **File**, point to **Switch To**, and then click **Preview New Family File**.

The new Family File window appears.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member

Barbara Dawson

Patient

Contact Information

Mobile Phone #
-

Home Phone #
(604)555-5635

Email
-

Address
258 Cedarville Road, Apt 203

Patient Information

Chart #
-

Gender
Female

Provider
MJL1, MHY1

Insurance Subscriber
No

Birthday
1962-12-26, 62

Fee Schedule
<Prov Default>

DL #
-

Position
Married

SIN
-

HofH / Guarantor
No

Continuing Care

2025-09-10 RECALL

Primary Dental Insurance

< 1 dental >

Details

Company
Canada Life

Group Plan
Vancouver Sun-Management

Group #
95235

Fee Schedule
-

Coverage
0.00

Used
0.00

Ded S/P/O
0/0/0

Met
0/0/0

Other Coverage
-

Notes

Show Notes

Notes are Hidden

Click "Show Notes" to see any notes on file.

Billing Information

Payment Amount
-

Amount Past Due
-

Billing Type
3 ⓘ

Last Payment
175.21

Aging Schedule

0 → 30	31 → 60	61 → 90	91 →	Balance
56.94	0.00	0.00	80.63	137.57

REACTIVATING ARCHIVED PATIENTS

You can now view and reactivate archived patients from the new Family File window.

To reactivate an archived patient

- 1. To reactivate an archived patient, click **File**, and then click **Select Patient**.
The **Select Patient** dialog box appears.
- 2. Select **Include Archived Patients**, select the archived patient you want to reactivate, and then click **OK**.

Select Patient

Search By: Appointments Advanced Search

Show On Screen Keyboard

☒ Last Name (Last, First)
 ☐ Phone
☐ First Name (First, Last)
 ☐ Chart #
☐ Preferred Name
 ☐ SIN

Enter Last Name (Last, First):

☒ Include Archived Patients

First Name	MI	Preferred Name	Phone	Chart #	SIN	Birthday	Status
Dennis	L		(403)555-8515 [H]		957-412-568	1956-10-11	Patient
Nathalie	J	Nat	(514)555-8596 [H]		595-745-856	1983-04-01	Patient
Carol			(519)-1245 [H]			1968-05-08	(Archived)
Colin			(519)555-7954 [H]			1998-06-07	Patient
Jeffery	L	Jeff				1968-07-21	Non-Patient
Linda			(519)555-7954 [H]			1970-08-16	Patient
Jennifer			(905)555-1111 [H]			1979-08-27	Patient
Rebecca	L	Becky	(604)555-5687 [H]		526-158-745	1980-08-25	Inactive
George							Non-Patient
Time							Patient

Previously Selected Patients

HoH	Last Name	First Name	MI	Preferred Name	Phone	Chart #	SIN	Birthday
*	Allard	Nathalie	J	Nat	(514)555-8596 [H]		595-745-856	1983-04-01
	Dawson	Barbara			(604)555-5635 [H]			1962-12-26
*	Murray	James			(746)555-0982 [M]			1995-10-13
*	Zimmerman	Francis			(403)555-1594 [H]		662-315-948	1939-09-23

More Info New Family

The selected patient's name appears in the Family File window.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member

Carol Andrews Archived

Contact Information

Home Phone # (519)425-1245 Work Phone # (519)485-4658

Email -

Address 897 Ulrich Dr., Belmont

Patient Information

Chart # - Gender Female Birthday 1968-05-08, 57 SIN -

Provider JLD1 Fee Schedule <Prov Default> DL # - HoH / Guarantor Yes

Insurance Subscriber No Position Married

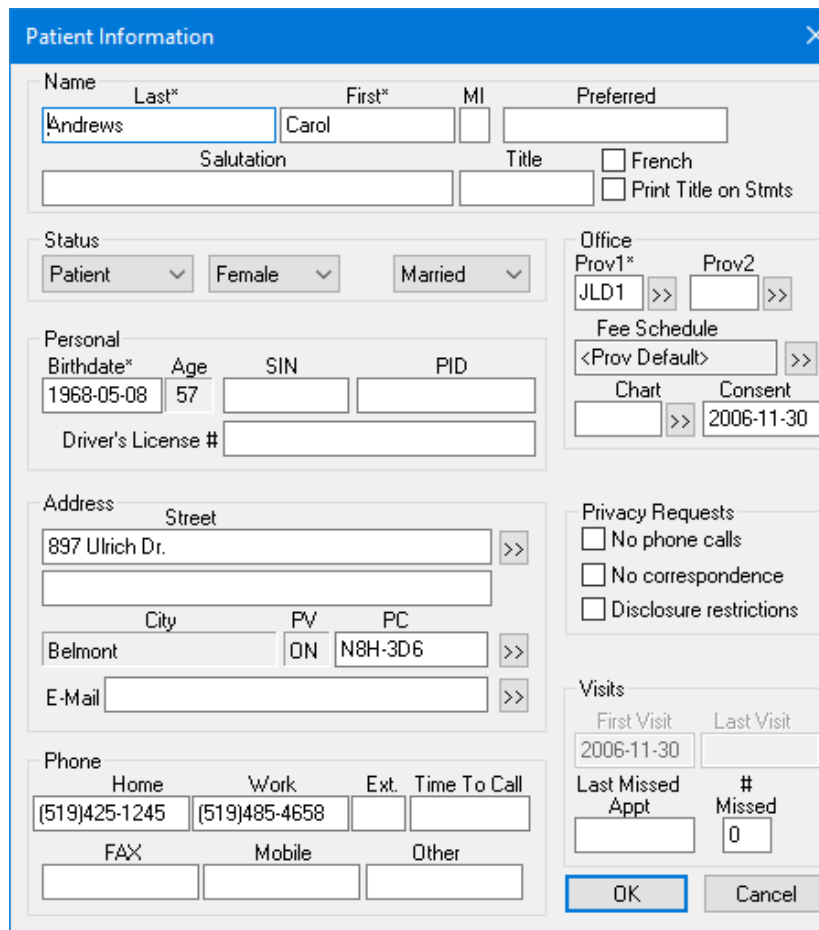
- To change the patient's status, in the Patient Information card, click the Edit icon.
A message appears.

Dentrix

Information for an archived patient cannot be edited. Would you like to reactivate this patient?

- To reactivate the patient, click OK.

The Patient Information dialog box appears.



The Patient Information dialog box is a form for entering patient data. It includes fields for Name (Last, First, MI, Preferred), Salutation, Title, French checkbox, and Print Title on Stmts checkbox. Status is set to Patient, Female, and Married. Office is JLD1, Prov1 is JLD1, Prov2 is empty. Fee Schedule is <Prov Default>. Chart is empty, Consent is 2006-11-30. Personal info includes Birthdate (1968-05-08), Age (57), SIN, PID, and Driver's License #. Address includes Street (897 Ulrich Dr.), City (Belmont), PV (ON), PC (N8H-3D6), and E-Mail. Phone includes Home (519)425-1245, Work (519)485-4658, Ext., Time To Call, FAX, Mobile, and Other. Privacy Requests include No phone calls, No correspondence, and Disclosure restrictions. Visits include First Visit (2006-11-30), Last Visit, Last Missed Appt, and # Missed (0). OK and Cancel buttons are at the bottom.

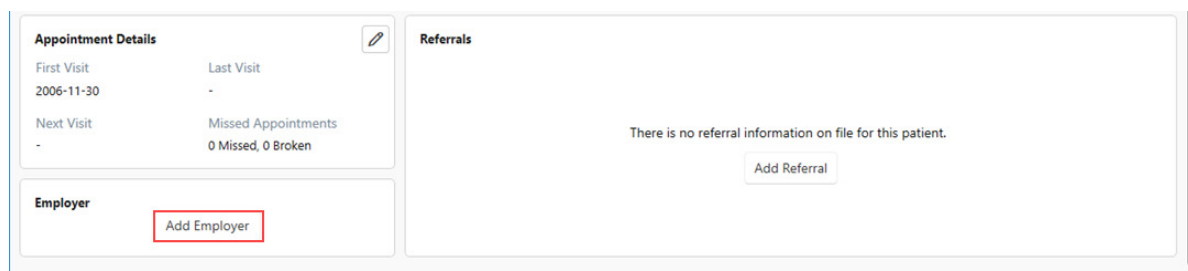
- To reactivate the patient, click OK.
The patient's status changes to **Patient**.

ADDING EMPLOYERS TO PATIENTS

You now add an employer to a patient from the new Family File window.

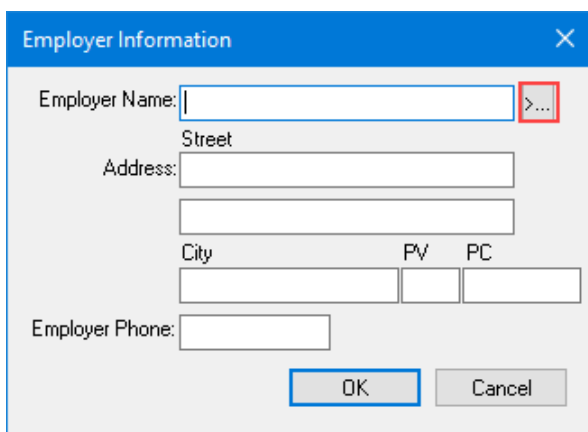
To add an employer to a patient

- To add an employer to a patient, navigate to the **Employer** card.



The Employer card is part of the Family File window. It shows Appointment Details (First Visit: 2006-11-30, Last Visit: -, Next Visit: -, Missed Appointments: 0 Missed, 0 Broken) and a Referrals section with a message: "There is no referral information on file for this patient." and an Add Referral button. The Employer section has an Add Employer button highlighted with a red box.

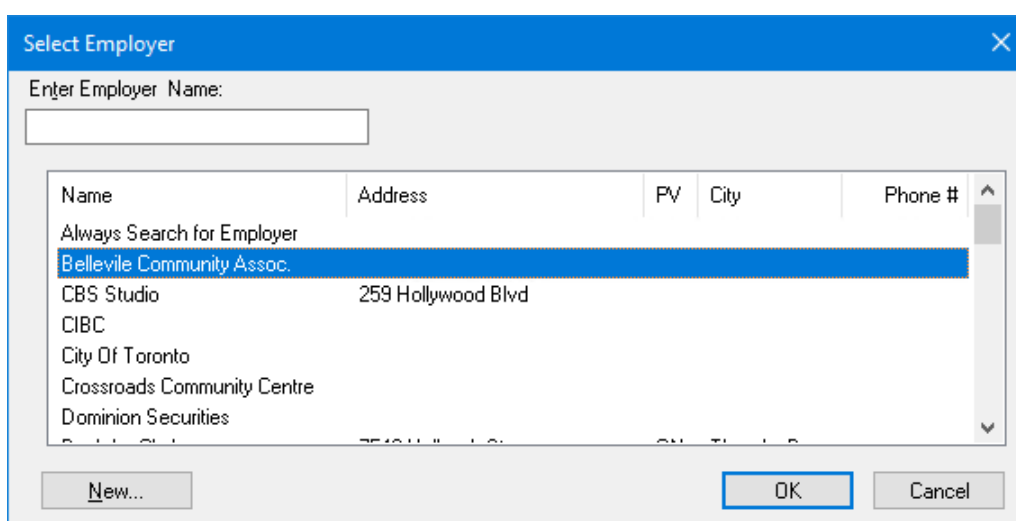
- Click Add Employer.
The Employer Information dialog box appears.



The **Employer Information** dialog box contains the following fields:

- Employer Name:** A text input field with a red-bordered chevron button to its right.
- Street:** A text input field.
- Address:** A text input field.
- City:** A text input field.
- PV:** A small text input field.
- PC:** A small text input field.
- Employer Phone:** A text input field.
- Buttons:** **OK** and **Cancel** buttons at the bottom.

- Click the **Employer Name** chevron.
The **Select Employer** dialog box appears.



The **Select Employer** dialog box contains the following elements:

- Enter Employer Name:** A text input field at the top.
- Table:** A table with columns: **Name**, **Address**, **PV**, **City**, and **Phone #**.

Name	Address	PV	City	Phone #
Always Search for Employer				
Belleville Community Assoc.				
CBS Studio	259 Hollywood Blvd			
CIBC				
City Of Toronto				
Crossroads Community Centre				
Dominion Securities				
- Buttons:** **New...**, **OK**, and **Cancel** buttons at the bottom.

- Click **OK** twice.
The **Select Employer** and **Employer Information** dialog boxes close respectively, and the selected employer appears in the **Employer** card.

DISMISSING OR REVERSING UPDATES FROM DENTRIX FORMS

Whenever a patient's information is updated in Dentrix Forms, a notification banner now appears under the selected patient's name. If desired, you can reverse these updates.

To dismiss or reverse an update

- Open the New Family File.
If a patient's contact information has been updated a notification banner appears.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member
Ken S Abbott ▾

Patient

New Information to Review Review information marked with a purple dot. Dismiss

Contact Information	Patient Information
<p>Home Phone # (666)666-6666</p> <p>Work Phone # (801) -1751</p> <p>Email 1KenAbb@dentrix.com</p> <p>Address 608 S 500 W, Apt. 101, Eastside</p>	<p>Chart # AB0001</p> <p>Gender Male</p> <p>Birthday 05/02/1987, 38</p> <p>Social Security # 000-00-0001</p> <p>Provider DDS1</p> <p>Fee Schedule <Prov Default></p> <p>DL # 11591446</p> <p>HofH / Guarantor Yes</p> <p>Insurance Subscriber Yes</p> <p>Position Married</p>

Continuing Care	Primary Dental Insurance
<p>01/30/2023 BITEWINGS</p> <p>04/11/2024 PROPHY</p> <p>04/11/2024 SCREENING</p> <p>12/01/2025 FMX</p> <p>01/02/2027 PANOREX</p>	<p>< 2 dental > Details</p> <p>Company Blue Cross Blue Shield</p> <p>Group Plan AT&T</p> <p>Group # 21440</p> <p>Fee Schedule -</p> <p>Coverage 1000.00</p> <p>Used 0.00</p> <p>Ded S/P/O 25/0/0</p> <p>Met 0/0/0</p> <p>Other Coverage -</p>

Notes	Billing Information
<p>There is no note information on file for this patient.</p> <p>Add Note</p>	<p>Payment Amount -</p> <p>Amount Past Due -</p> <p>Billing Type 4</p> <p>Last Payment 0.00</p> <p>Aging Schedule</p>

- To close the banner, click **Dismiss**.
The banner closes and will not reappear unless you close and reopen the Family File.
- To reverse an update, click the desired purple dot.
The **Patient Updated** screen appears.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member

Ken S Abbott ▾ Patient

Contact Information

Home Phone # (666)666-6666

Work Phone #

Email 1KenAbb@dentrix.com

Address 608 S 500 W, Apt. 101, E

Patient Information

Chart #

Gender Male

Birthday 05/02/1987, 38

Fee Schedule <Prov Default>

DL # 11591446

Position Married

Insurance Subscriber

Social Security # 000-00-0001

HofH / Guarantor Yes

Continuing Care

01/30/2023 BITEWINGS

04/11/2024 PROPHY

04/11/2024 SCREENING

12/01/2025 FMX

01/02/2027 PANOREX

Primary Dental Insurance < 2 dental >

Company Blue Cross Blue Shield

Group Plan AT&T

Group # 21440

Coverage 1000.00

Used 0.00

Ded S/P/O 25/0/0

Fee Schedule -

Met 0/0/0

Other Coverage -

Notes

There is no note information on file for this patient.

[Add Note](#)

Billing Information

Payment Amount -

Amount Past Due -

Billing Type 4

Last Payment 0.00

Aging Schedule

0 → 30	31 → 60	61 → 90	91 →	Balance
0.00	0.00	0.00	0.00	0.00

- Click Revert to previous.

Dentrix 25.8 Canada

Overview and New Features

This Dentrix 25.8 Canada Release Guide provides information about the Dentrix 25.8 Canada 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 25.8 Canada.

Note: For information about using the new features in Dentrix 25.8 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.8 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.8 Canada includes the following enhancements:

THE REDESIGNED FAMILY FILE WINDOW

The redesigned Family File window is now available for all Beta offices to view and try out. We invite your feedback. You can preview the latest features in this Release Guide:

- You can now open the **Add a New Patient** dialog box from the new Family File window.
- A status indicator now appears above the Patient Information card indicating whether a patient is a **New Patient**, **Patient**, **Non-Patient**, **Inactive**, or **Archived**.
- A tooltip appears to notify you when Exceptions and/or Notes were added to the **Dental Insurance Benefits and Coverage** dialog box. The same tooltip also appears in the **Dental Insurance Benefits and Coverage** 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 features and enhancements, refer to the Dentrix Help.

Previewing the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. You can preview the proposed changes.

Note: Currently, the new Family File window consists of several cards (Contact Information, Patient Information, Continuing Care, Primary Dental Insurance, Notes, Billing Information, and so on).

To preview the redesigned Family File

1. Open the Family File and select a patient.

Dentrix Family File - Murray, James

File Edit Help

Contact Information:
 Name: Murray, James
 Address: 723 Oak Lane
 Calgary, AB T2P-9K8
 Phone: M (746)555-0982
 Status: Non-Pat, M, Married, Guar, H-of-H
 Consent: 2025-02-04
 First Visit:
 Last Visit:
 Missed Appt:
 E-Mail: jmmurray@email.com

Chart #:
 SIN:
 DL#: 1995-10-13, 29
 Birthday: 1995-10-13, 29
 Provider: JLD1
 Fee Sched: <Prov Default>

Health History **Employer**

Primary Dental Insurance:
 Company:
 Group Plan:
 Group #:
 Fee Sched:
 Coverage: 0.00
 Ded. S/P/O: 0/0/0
 Other Max:
 Div:
 Used: 0.00
 Met: 0/0/0

Patient Notes:
 (No Note)

Referred By:
 Dacro, Jack 2025-02-04

Referred To:

0-->30	31-->60	61-->90	91-->	Balance
0.00	0.00	0.00	0.00	0.00

Payment Amt: NA **Amt Past Due:** NA
Bill Type: 1 **Last Payment:** 0.00

Status	Name	Position	Gender	Patient	Birthday
HofH Guar	Murray, James	Married	Male	No	1995-10-13
	Murray, Jenny	Married	Female	No	1996-06-02

2. Click **File**, point to **Switch To**, and then click **Preview New Family File**.

The new Family File window appears.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member

Barbara Dawson

Patient

Contact Information

Mobile Phone #
-

Home Phone #
(604)555-5635

Email
-

Address
258 Cedarville Road, Apt 203

Patient Information

Chart #
-

Gender
Female

Provider
MJL1, MHY1

Insurance Subscriber
No

Birthday
1962-12-26, 62

Fee Schedule
<Prov Default>

DL #
-

Position
Married

SIN
-

HofH / Guarantor
No

Continuing Care

2025-09-10 RECALL

Primary Dental Insurance

< 1 dental >

Details

Company
Canada Life

Group Plan
Vancouver Sun-Management

Group #
95235

Fee Schedule
-

Coverage
0.00

Used
0.00

Ded S/P/O
0/0/0

Met
0/0/0

Other Coverage
-

Notes

Show Notes

Notes are Hidden

Click "Show Notes" to see any notes on file.

Billing Information

Payment Amount
-

Amount Past Due
-

Billing Type
3

Last Payment
175.21

Aging Schedule

0 → 30	31 → 60	61 → 90	91 →	Balance
56.94	0.00	0.00	80.63	137.57

- 3. To add a new patient, click **File**, and then click **Select Patient**.
The **Select Patient** dialog box appears.
- 4. Click **New Family**.
The **Add a New Patient** dialog box appears.

Add a New Patient

Patient Details Address & Contact Info

Patient Details

First Name * Middle initial Last Name * Preferred Name

Birthdate * Please use MM/DD/YYYY format. Gender

Family Position Patient Status

Family File

Select an option to add the patient to a family file *

☒ Create New Family ☐ Add to an Existing Family

Provider Information

Primary Provider *

Contact Details

Email address Mobile Phone Number

Referred By

CANCEL SAVE PATIENT

5. Complete the required information (an asterisk denotes required information), and then click **Save Patient**.
6. To change a patient's status, in the **Patient Information** card, click the Edit icon.
The **Patient Information** dialog box appears.

Patient Information

Name Last* First* MI Preferred
 Dawson Barbara [] []
 Salutation Title ☐ French ☐ Print Title on Strms

Status Patient ☐ Female ☐ Married ☐
 Patient Non-Patient Inactive Archived
 1962-12-26 1962-12-26
 SIN PID
 Driver's License #

Office Prov1* Prov2
 MJL1 >> MHY1 >>
 Fee Schedule <Prov Default> >>
 Chart Consent
 >> 2006-09-13

Address Street
 258 Cedarville Road >>
 Apt 203
 City PV PC
 >>
 E-Mail >>

Privacy Requests
☐ No phone calls
☐ No correspondence
☐ Disclosure restrictions

Visits First Visit Last Visit
 2006-09-13 2024-12-09
 Last Missed #
 Appt Missed
 2019-03-01 1

Phone Home Work Ext. Time To Call
 (604)555-5635 [] [] []
 FAX Mobile Other
 [] [] []

OK Cancel

7. Under **Status**, select the desired status, and then click **OK**.
 In the Family File window, the patient's status changes.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member
Barbara Dawson ☐ Inactive

Contact Information

Mobile Phone # Home Phone #
 - (604)555-5635
 Email
 -
 Address
 258 Cedarville Road, Apt 203

Patient Information

Chart # Gender Birthday SIN
 - Female 1962-12-26, 62 -
 Provider Fee Schedule DL # Hoff / Guarantor
 MJL1, MHY1 <Prov Default> - No
 Insurance Subscriber Position
 No Married

Note: A tooltip appears in the insurance card if a patient's insurance plan contains exceptions or plan notes. The same tooltip appears in the **Dental Insurance Benefits and Coverage** dialog box.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member
Barbara Dawson Inactive

Contact Information

Mobile Phone # Home Phone #
- (604)555-5635

Email
-

Address
258 Cedarville Road, Apt 203

Patient Information

Chart # Gender Birthday SIN
- Female 1962-12-26, 62 -

Provider Fee Schedule DL # HofH / Guarantor
M/L1, MHY1 <Prov Default> - No

Insurance Subscriber Position
No Married

Continuing Care

2025-09-10 RECALL

Primary Dental Insurance < 1 dental >

Company Group Plan Group # Fee Schedule
Canada Life Vancouver Sun-Management 95235 -

Coverage Used Ded S/P/O Met
0.00 0.00 0/0/0 0/0/0

Other Coverage
-

Notes Show Notes

Notes are Hidden
Click "Show Notes" to see any notes on file.

Billing Information

Payment Amount Amount Past Due Billing Type Last Payment
- - 3 175.21

Aging Schedule

0 → 30	31 → 60	61 → 90	91 →	Balance
56.94	0.00	0.00	80.63	137.57

8. To view the exceptions and/or notes, click the **Details** button.
The **Dental Insurance Benefits and Coverage** dialog box appears.

Dental Insurance Benefits and Coverage - Canada Life / Vancouver Sun-Management / 95235 [Primary Insurance]

Insurance Plan Subscriber: Brian Dawson Benefit Begin Date* 27/05/2020 Subscriber ID: 65829 Signature on File: []
 Deductibles/Maximums Patient: Barbara Dawson Benefit Begin Date* 27/05/2020 [x] Release of Information [x] Assignment of Benefits Continuing Care

Coverage Table Exceptions Table* Search Select Insurance Plan to Copy From: []

Beg Proc	End Proc	Service	Waiting Period	Downgrade Procedure	Downgrade Tooth Types	Age Max	Age Min	Covers Only Tooth Type	Frequency Limits	Shares Freq?	Same Day?	Exception Note
01021	01204	Description	6 month/s									

Exceptions Insurance Plan Notes Payment Table & Allowed Amounts

Updating any benefit and coverage information will affect all patients who have this insurance plan.
*Information only - not included for insurance estimate calculations.

Refresh Save Close

9. To view the exceptions or notes, click **Exceptions** or **Insurance Plan Notes**, respectively.

Dentrix 25.7 Canada

Overview and New Features

This Dentrix 25.7 Canada Release Guide provides information about the Dentrix 25.7 Canada 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 25.7 Canada.

Note: For information about using the new features in Dentrix 25.7 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.7 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.7 Canada includes the following enhancements:

MISCELLANEOUS

- (Limited Beta Only) The Edit icons in the new Family File window now appear whenever a card contains information about the selected patient.
- (Limited Beta Only) Any card in the new Family File window that does not contain patient information about the selected patient now has an Add button.
- (Limited Beta) The new Family File window resizes automatically based on the resolution/scaling of the monitor so that the window always fits in the viewable screen area.
- Dentrix Imaging now installs automatically when you install Dentrix.

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 features and enhancements, refer to the Dentrix Help.

Previewing the New Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. You can preview the proposed changes.

To preview the new Family File

1. Open the Family File and select a patient.

Dentrix Family File - Murray, James

File Edit Help

Name: Murray, James
Address: 723 Oak Lane
 Calgary, AB T2P-9K8
Phone: M (746)555-0982
Status: Non-Pat, M, Married, Guar, H-of-H
Consent: 2025-02-04
First Visit:
Last Visit:
Missed Appt:
E-Mail: jmurray@email.com
Chart #:
SIN:
DL#:
Birthdate: 1995-10-13, 29
Provider: JLD1
Fee Sched: <Prov Default>

Health History **Employer** **Cont. Care**

Primary Dental Insurance
Company:
Group Plan:
Group #:
Fee Sched:
Coverage: 0.00
Ded. S/P/O: 0/0/0
Other Max:
Div:
Used: 0.00
Met: 0/0/0

0-->30	31-->60	61-->90	91-->	Balance
0.00	0.00	0.00	0.00	0.00

Payment Amt: NA **Amt Past Due:** NA
Bill Type: 1 **Last Payment:** 0.00

Patient Notes
 (No Note)

Referred By
 Dacro, Jack 2025-02-04

Referred To

Status	Name	Position	Gender	Patient	Birthdate
HofH Guar	Murray, James	Married	Male	No	1995-10-13
	Murray, Jenny	Married	Female	No	1996-06-02

2. Click **File**, point to **Switch To**, and then click **Preview New Family File**.

The new Family File window appears.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member
Nathalie J Allard

Contact Information		Patient Information																
Home Phone # (514)555-8596	Work Phone # (514)555-4985	Chart # -	Gender Female															
Email -		Provider MJL1	Fee Schedule <Prov Default>															
Address 4253 Wilson Ave, Montreal		Insurance Subscriber Yes	Position Single															
Continuing Care		Primary Dental Insurance < 1 dental >																
There is no continuing care information on file for this patient. Add Continuing Care		Company Zurich	Group Plan Y M C A															
		Coverage 2500.00	Group # 44587															
		Other Coverage -	Fee Schedule -															
			Ded S/P/O 0/0/0															
			Met 0/0/0															
Notes		Referrals																
Show Notes Notes are Hidden Click "Show Notes" to see any notes on file.		<table border="1"> <thead> <tr> <th>Referral Type</th> <th>Individual or Source</th> <th>Date of Referral</th> </tr> </thead> <tbody> <tr> <td>Referred To</td> <td></td> <td></td> </tr> <tr> <td>Doctor / Other</td> <td>Dr. Corbett, Janice</td> <td>2006-09-07</td> </tr> <tr> <td>Referred By</td> <td></td> <td></td> </tr> <tr> <td>Doctor / Other</td> <td>Ad.</td> <td>2003-02-24</td> </tr> </tbody> </table>		Referral Type	Individual or Source	Date of Referral	Referred To			Doctor / Other	Dr. Corbett, Janice	2006-09-07	Referred By			Doctor / Other	Ad.	2003-02-24
Referral Type	Individual or Source	Date of Referral																
Referred To																		
Doctor / Other	Dr. Corbett, Janice	2006-09-07																
Referred By																		
Doctor / Other	Ad.	2003-02-24																
Appointment Details																		

Note: Currently, the new Family File window consists of several cards (Contact Information, Patient Information, Continuing Care, Primary Dental Insurance, and so on).

- To add continuing care, click **Add Continuing Care**.
The **Continuing Care** dialog box appears.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member
Nathalie J Allard

Contact Information

Home Phone # (514)555-8596

Work Phone # (514)555-4985

Email -

Address 4253 Wilson Ave., Montreal

Patient Information

Chart # -

Gender Female

Birthday 1983-04-01, 42

SIN 595-745-856

HofH / Guarantor Yes

Continuing Care

There is no continuing care information on file for this patient.

Add Continuing Care

Notes

Show Notes

Notes are Hidden

Click "Show Notes" to see any notes on file.

Referrals

Referral Type	Individual or Source	Date of Referral
Referred To		
Doctor / Other	Dr. Corbett, Janice	2006-09-07
Referred By		
Doctor / Other	Ad.	2003-02-24

Appointment Details

Dentrix Continuing Care - Allard, Nathalie J(Nat)

Date	Type	Appt?	Status	Prior Treat	Prov
	RECALL				
	SCALING				

Set... Clear... Close

Fee Schedule

-

Met 0/0/0

- Select the type of continuing care, and then click **Set**.
The **Set Continuing Care** dialog box appears.
- Click **OK**.
The continuing care type you selected appears in the **Continuing Care** card.

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member
Nathalie J Allard

Contact Information

Home Phone # (514)555-8596

Work Phone # (514)555-4985

Email -

Address 4253 Wilson Ave., Montreal

Patient Information

Chart # -

Gender Female

Birthday 1983-04-01, 42

SIN 595-745-856

Provider MJL1

Fee Schedule <Prov Default>

DL # -

HofH / Guarantor Yes

Insurance Subscriber Yes

Position Single

Continuing Care

2026-01-16	RECALL
2026-01-16	
2026-01-16	RECALL
2026-01-16	RECALL
2026-01-16	RECALL

Primary Dental Insurance < 1 dental >

Company	Group Plan	Group #	Fee Schedule
Zurich	Y M C A	44587	-
Coverage	Used	Ded S/P/O	Met
2500.00	0.00	0/0/0	0/0/0
Other Coverage			
-			

- To provide your thoughts of and suggestions for the new Family File design, please click the [feedback](#) link.

Dentrix 25.6 Canada

Overview and New Features

This Dentrix 25.6 Canada Release Guide provides information about the Dentrix 25.6 Canada 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 25.6 Canada.

Note: For information about using the new features in Dentrix 25.6 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.6 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.6 Canada includes the following enhancements:

MISCELLANEOUS

- The **Add a New Patient** dialog box was modified to aid you in collecting a more complete profile of new patients.
- The preview of the new Family File window was modified to include new cards.
- Dentrix Imaging now installs automatically when you install Dentrix.

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 features and enhancements, refer to the Dentrix Help.

Adding New Family Accounts

In Dentrix, patient files are organized by family. When you add new patients, you must first enter the head of household or guarantor, even if that person is not a patient. After entering the head of household, you can add other family members.

To add a new family account

1. In the Family File, click **File**, and then click **New Family**.

The **Select Patient** dialog box appears.

2. Enter the family's last name to verify that the family is not already entered in the system.
3. Click **New Family**.

The **Add a New Patient** dialog box appears.

4. Provide the following mandatory information:
 - Type the patient's first and last names in the corresponding fields.
 - Type the patient's **Birthdate**.

- Select one of the following options:
 - **Create New Family** – Creates a new family.
 - **Add to an Existing Family** – Adds the new patient as a member of an existing family.
 - Select the new patient's **Primary Provider** from the provider list.
5. Provide the following information:
- Select the patient's **Gender**.
 - Select the patient's **Family Position (Single, Married, Child, Other)**.
 - Type the patient's **Email address**.
 - Type the patient's **Mobile Phone Number**.
 - Select the patient's **Referral Source**.
6. To complete the new patient's contact information, click **Address & Contact Info**.
The **Address & Contact Info** page appears.

Add a New Patient

Patient Details **Address & Contact Info**

Contact Information

Street Address

City Province Postal Code

Home Phone Other Phone

Emergency Contact

Emergency Contact Emergency Contact #

CANCEL SAVE PATIENT

7. Enter following patient information:
- **Street Address** – The patient's street address.
 - **City** – The patient's city.
 - **Province** – The patient's province.
 - **Postal Code** – The patient's postal code.
 - **Home Phone** –
 - **Other Phone** –
 - **Emergency Contact** – (Entering the patient's address makes this field mandatory.)

- **Emergency Contact #** – Emergency contact's phone number. (Entering the patient's address or an emergency contact makes this field mandatory.)

8. Click **SAVE PATIENT**.

Previewing the New Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. You can preview the proposed changes.

To preview the new Family File

1. Open the Family File and select a patient.

Dentrix Family File - Murray, James

File Edit Help

Name: Murray, James
Address: 723 Oak Lane
 Calgary, AB T2P-9K8
Phone: M (746)555-0982
Status: Non-Pat, M, Married, Guar, H-of-H
Consent: 2025-02-04
First Visit:
Last Visit:
Missed Appt:
Chart #:
SIN:
DL#:
Birthday: 1995-10-13, 29
Provider: JLD1
Fee Sched: <Prov Default>
E-Mail: jmurray@email.com

Health History **Employer** **Cont. Care**

Primary Dental Insurance
Company:
Group Plan:
Group #: **Div:**
Fee Sched:
Coverage: 0.00 **Used:** 0.00
Ded. S/P/O: 0/0/0 **Met:** 0/0/0
Other Max:

0-->30	31-->60	61-->90	91-->	Balance
0.00	0.00	0.00	0.00	0.00

Payment Amt: NA **Amt Past Due:** NA
Bill Type: 1 **Last Payment:** 0.00

Patient Notes
 (No Note)

Referred By
 Dacro, Jack 2025-02-04

Referred To

Status	Name	Position	Gender	Patient	Birthday
HoH Guar	Murray, James	Married	Male	No	1995-10-13
	Murray, Jenny	Married	Female	No	1996-06-02

2. Click **File**, point to **Switch To**, and then click **Preview New Family File**.

The new Family File window appears.

Note: Currently, the new Family File window consists of several cards (**Contact Information**, **Patient Information**, **Continuing Care**, **Primary Dental Insurance**, and so on).

Family File

File

Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.

Family Member

James Murray

Contact Information

Mobile Phone #

(746)555-0982

Home Phone #

-

Email

jmurray@email.com

Address

723 Oak Lane, Calgary

Patient Information

Chart #

-

Gender

Male

Birthday

10-13-1995, 29

Social Security #

-

Provider

JLD1

Fee Schedule

<Prov Default>

DL #

-

HofH / Guarantor

Yes

Insurance Subscriber

No

Position

Married

Continuing Care

There is no continuing care information on file for this patient.

Add Continuing Care

Dental Insurance

There is no insurance information on file for this patient.

Add Insurance

Notes

Show Notes

Notes are Hidden

Click "Show Notes" to see any notes on file.

Family File

Add Continuing Care

Add Insurance

Notes

Show Notes

Notes are Hidden

Click "Show Notes" to see any notes on file.

Appointment Details

First Visit

0001-01-01

Last Visit

0001-01-01

Next Visit

-

Missed Appointments

0 Missed, 0 Broken

Employer

Referrals

Referral Type

Individual or Source

Date of Referral

Referred By

Doctor / Other

Dacro, Jack

2025-02-04

3. To edit the contents of a card, hover your mouse pointer over the desired card.
An Edit icon appears in the upper-right corner of the card.



- Click the Edit icon.

The dialog box corresponding to the card appears.

The screenshot shows the 'Family File' window with a patient card for James Murray. A 'Patient Information' dialog box is open, displaying various fields for patient data. The background window includes sections for Contact Information, Continuing Care, and Notes.

Family File Window:

- File:** Here's a sneak peek of the new Family File! We are still adding more features, but would love to hear your [feedback](#) on what we have so far.
- Family Member:** James Murray
- Contact Information:**
 - Mobile Phone #: (746)555-0982
 - Home Phone #: -
 - Email: jmurray@email.com
 - Address: 723 Oak Lane, Calgary
- Continuing Care:**
 - There is no continuing care information on file for this patient.
 - Button: Add Continuing Care
- Notes:**
 - Button: Show Notes
 - Notes are Hidden
 - Click "Show Notes" to see any notes on file.

Patient Information Dialog Box:

- Name:** Last* (Murray), First* (James), MI (), Preferred ()
- Salutation:** (), **Title:** (), ☐ French, ☐ Print Title on Strips
- Status:** Non-Patient, **Male:** (), **Married:** ()
- Office:** Prov1* (JLD1), Prov2 (), **Fee Schedule:** (Prov Default), **Chart:** (), **Consent:** (2025-02-04)
- Personal:** Birthdate* (1995-10-13), Age (29), SIN (), PID (), Driver's License # ()
- Address:** Street (723 Oak Lane), City (Calgary), PV (AB), PC (T2P-9K8), E-Mail (jmurray@email.com)
- Privacy Requests:** ☐ No phone calls, ☐ No correspondence, ☐ Disclosure restrictions
- Visits:** First Visit (), Last Visit (), Last Missed Appt. (), # Missed (0)
- Phone:** Home (), Work (), Ext. (), Time To Call (), FAX (), Mobile ((746)555-0982), Other ()
- Buttons:** OK, Cancel

- To provide your thoughts of and suggestions for the new Family File design, please click the [feedback](#) link.

Dentrix 25.5 Canada

Overview and New Features

This Dentrix 25.5 Canada Release Guide provides information about the Dentrix 25.5 Canada 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 25.5 Canada.

Note: For information about using the new features in Dentrix 25.5 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.5 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.5 Canada includes the following enhancements:

MISCELLANEOUS

- You can now reset provider and staff passwords from the **Practice Resource Setup** dialog box.
- DDX Referrals, an online platform that allows you to communicate digitally with dental specialist practices, is now available.
- Dentrix Imaging now installs automatically when you install Dentrix.

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 features and enhancements, refer to the Dentrix Help.

Resetting Provider and Staff Passwords

You can now reset provider and staff passwords from the **Practice Resource Setup** dialog box.

To reset a provider or staff password

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

The **Practice Resource Setup** dialog box appears.

Practice Resource Setup

Operatories

Search Operatories

ID	Title
OP-1	Operator 1
OP-2	Operator 2
OP-3	Operator 3
OP-4	Operator Four
OP-5	Operator Five

Providers

Search Providers ☐ Show Inactive

ID	Name	Title	Class
JHY1	Donna S. Mills	R.D.H.	Secondary
JLD1	James L. Davidson	D.D.S.	Primary
MHY1	Helen W. Patton	R.D.H.	Secondary
MUL1	Michael J. Lang	DDS	Primary

Staff Members

Search Staff Members ☐ Show Inactive

ID	Name	Title	Class
CDA1	Nancy Hill	CDA Level II	Staff
PT01	Suzan I. Goodstaff	Part time reception	Staff
ST01	Gail Smith	Admin	Staff

Henry Schein Dental Clinic

345 Townline Road
Niagara On The Lake, ON L0S-1J0
(905) 555-1711

Administrative Contact: Not Set
HIPPA Officer: Not Set
Fiscal Year: January
Bank Number: 2345-003

2. Click the provider whose password you want to reset.
3. Click **Manage**, and then from the list, click **Reset Password**.

The **Create a Temporary Password** dialog box appears.

Create a Temporary Password

Create and confirm a temporary password. The user's existing password will expire, and they'll use the temporary password to log in and set a new one. Please ensure it meets the password criteria below.

Temporary Password

Temporary password criteria:

- At least 8 characters
- At least 1 alphabetical upper case character (A-Z)
- At least 1 alphabetical lower case character (a-z)
- At least 1 number (0-9)
- At least 1 keyboard symbol (ex., !, @, \$)

Confirm Temporary Password

CANCEL **RESET PASSWORD**

4. Under **Temporary Password**, type a password.
5. Under **Confirm Temporary Password**, re-type the temporary password, and then click **Reset Password**.

The next time the provider logs in, he or she must create a new, more permanent password.

Enabling DDX Referrals

DDX Referrals is an online platform that allows you to communicate digitally with dental specialist practices. Features include:

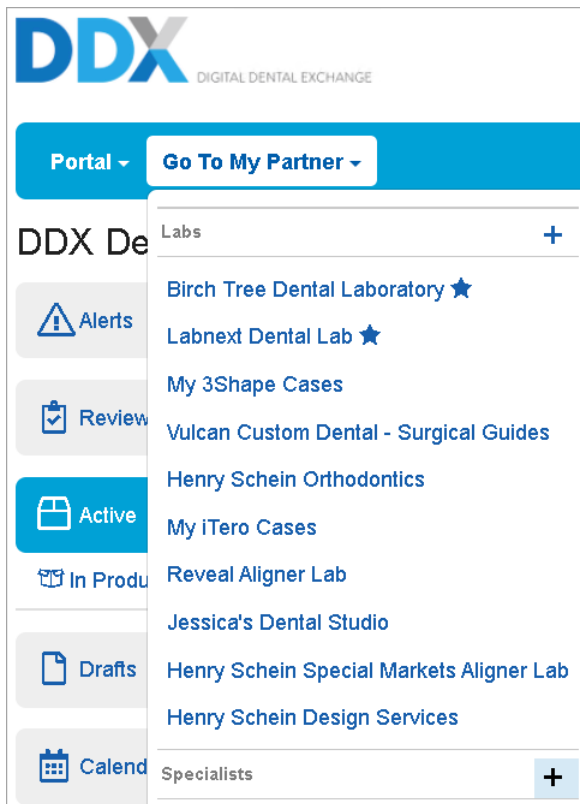
- An online referrals form that your practice completes. You can then select the appropriate treatments offered by the dental specialist.
- Dental specialists receive patient referrals digitally through DDX.
- Bidirectional communication between your practice and the dental specialist provides referrals information on:
 - Changes in status (new, accepted, completed).
 - Notes or messages online and through email notifications.
 - File sharing of photos, digital impressions, insurance forms, and treatment summaries.
- Referral data appears in the Patient Chart, Clinical Notes, and the Document Center.

LINKING YOUR PRACTICE TO DENTAL SPECIALISTS

You can link your practice to dental specialists using DDX Referrals.

To link your practice to a dental specialist

1. Log in to your DDX dental practice account at <https://ddxdental.com/login>.
2. Click **Go To My Partner**, and then in the **Specialists** section, click the plus sign +.



3. Use the search tool to find your dental specialist.
4. Under **Results**, click the blue button to the right of the specialist you want to add.

The screenshot shows the DDX Partner Search interface. At the top, there is a header with the DDX logo and navigation links: 'Invite a Colleague', 'Help', 'Main Doc', and '@ DDX Demo Practice'. Below the header, there is a blue bar with 'Portal', 'Go To My Partner', 'New Task', and a search bar. The main section is titled 'Partner Search' and includes a 'Partner Details' section with a 'Partner Type' dropdown set to 'Specialist'. Below this is a 'Search' section with filters: 'Search in' (United States), 'By' (Specialist Name), 'Name' (dr endo), and 'Specialty' (All Specialties). A 'Search' button is at the bottom of the search filters. The 'Results' section shows a table with the following data:

Specialist	City	State	Telephone	Specialties
DDX Demo - Dr Endo	American Fork	UT	801-888-9999	Endodontics

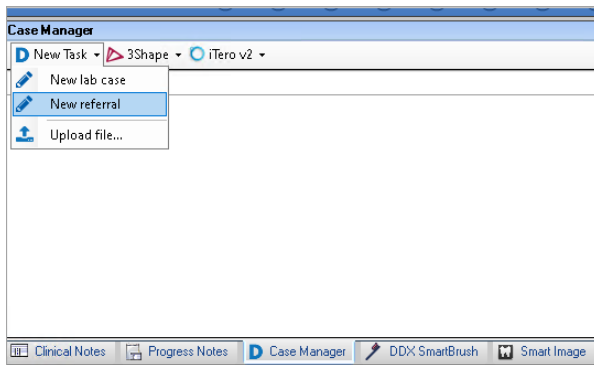
A blue button with a plus sign is located to the right of the 'Endodontics' specialty in the results table.

SENDING DDX REFERRALS

You can use DDX Referrals to refer a patient to a dental specialist.

To send a DDX Referral

1. Open the Patient Chart, and then select the desired patient.
2. Open the **Case Manager** panel.



3. Click **New Task**, and then click **New Referral**.
Your browser opens the DDX website.
4. If prompted, enter your login credentials.
5. From the **My Specialists** list, select the desired specialist, and then click **Use Specialist**.

DDX DIGITAL DENTAL EXCHANGE

Invite a Colleague Help Main Doc @DDX Demo Practice

Portal Go To My Partner New Task Search

Request A New Referral

Select A Specialist

My Specialists

- DDX Demo - Dr Endo
- Lyons Ortho
- Main Street Ortho
- Perio Test Dental GC
- QA Test Dental

Find A Specialist

Country: United States by: All Specialties

by: Specialist Name Term:

Search

Specialist Details

DDX Demo - Dr Endo American Fork, UT 801-888-9999	Specialties Endodontics	<input checked="" type="button" value="Use Specialist"/>
--	-----------------------------------	--

Dentrix enters the patient's details on the DDX referral form automatically.

DDX DIGITAL DENTAL EXCHANGE Invite a Colleague Help Main Doc @DDX Demo Practice

Portal Go To My Partner New Task Search

New Referral

Specialist Details

Specialist * DDX Demo - Dr Endo **Specialist Provider** Fred Endo

Patient Details

Provider	Main Doc	Gender	Female
First Name	Mary	Patient Chart *	HO0006
Last Name *	Horton	Birth Date	1972-08-15
Email	maryh@email.com	Telephone	8019021234

6. Select the **Procedure** that corresponds to the treatment you are requesting.

Procedures

Procedure *

Teeth

Endodontics

- Patient is swollen. Please evaluate for Endo
- Patient is in pain. Please evaluate for Endo**
- Pulp is exposed and needs Endo
- Tooth Avulsed
- Previous Endodontic Treatment Failing
- Possible abscess around tooth
- Traumatic injury
- Apicoectomy
- Tooth decay - crown anticipated - complete endo
- Incomplete endo fill - please evaluate
- Other - See Notes

Attach Files

7. Complete one or more of the following optional tasks:

- Specify the affected tooth or teeth and/or arches.

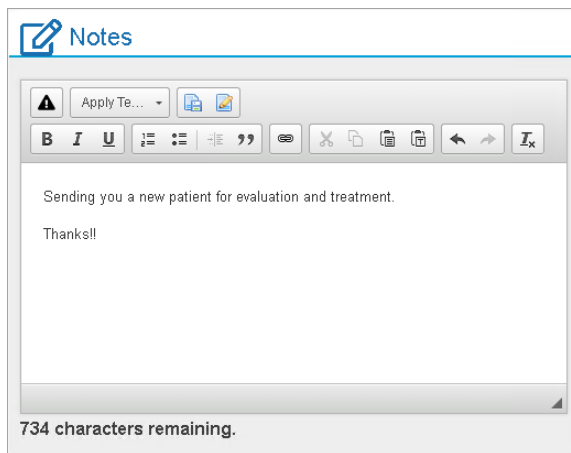
Procedures

Procedure * Patient is in pain. Ple

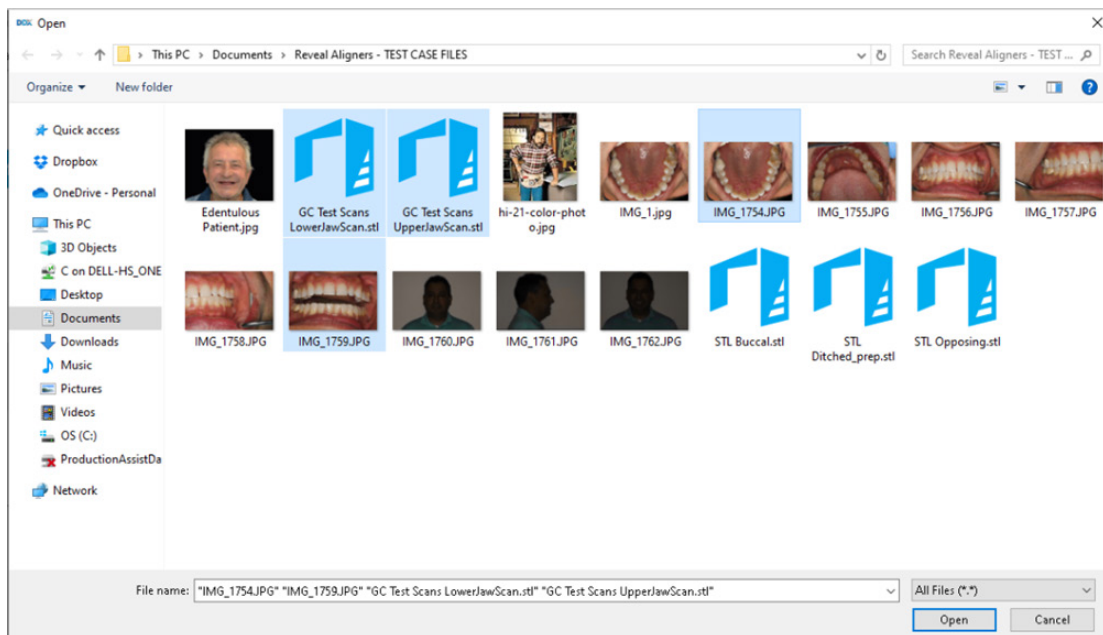
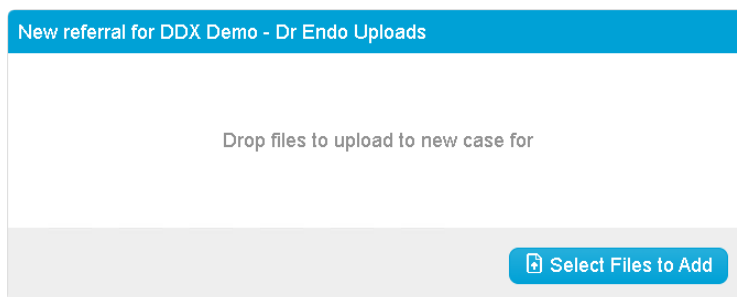
Teeth 13-11

+ Add Another Procedure

- Create a note.



- Click **Attach Files**, and then click **Select Files to Add** to attach any digital files you want to send.



- Select the files you want to add, and then click **Submit Referral**.

The referral is sent digitally to the selected specialist.

New Referral

Specialist Details

Specialist *

DDX Demo - Dr Endo

Specialist Provider

Fred Endo

Patient Details

Provider

Main Doc

Gender

Female

First Name

Mary

Patient Chart *

HO0006

Last Name *

Horton

Birth Date

1972-08-15

Email

maryh@email.com

Telephone

8019021234

Files

Procedures

Procedure *

Patient is in pain. Ple

Teeth

13-11

+ Add Another Procedure

Notes

Apply T...

B *I* U

Sending you a new patient for evaluation and treatment.

Thank!!

735 characters remaining.

Attach Files

Submit Referral

Dentrix 25.4 Canada

Overview and New Features

This Dentrix 25.4 Canada Release Guide provides information about the Dentrix 25.4 Canada 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 25.4 Canada.

Note: For information about using the new features in Dentrix 25.4 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.4 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.4 Canada includes the following enhancements:

MISCELLANEOUS

- An option allowing you to automatically print iTrans responses including EOBs was added to **Print Options** in the **Preferences** dialog box.
- In the Update Manager, **Automatic Updates** is now set to **On** by default.
- DDX now installs automatically when you install Dentrix.

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 features and enhancements, refer to the Dentrix Help.

Setting Up Print Options

You can now select an option to print iTrans responses including EOBs automatically.

To set up print options

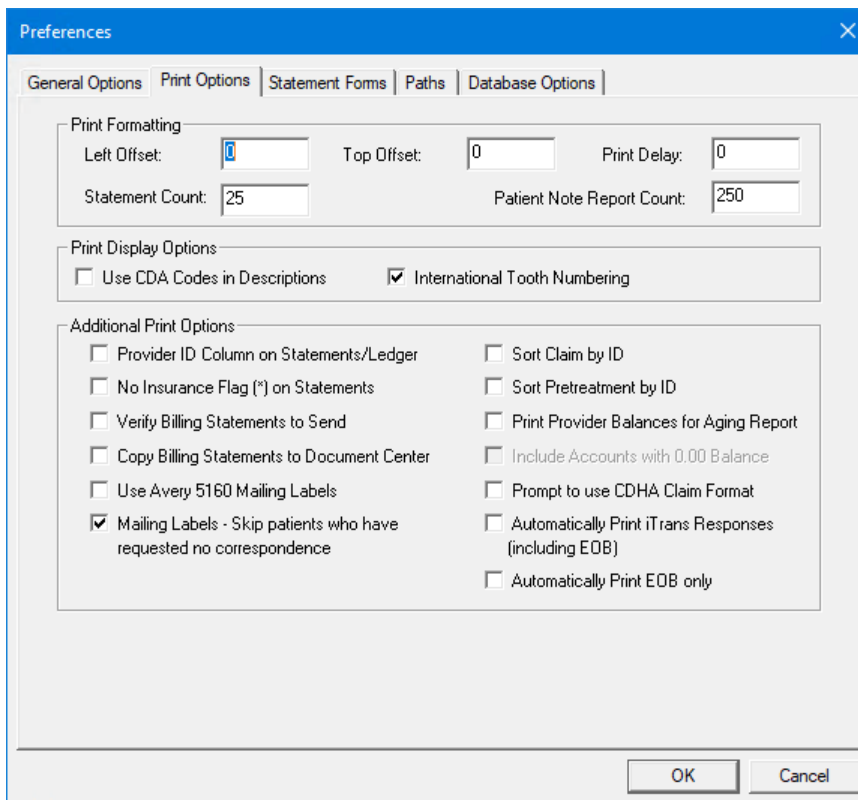
1. In the Office Manager, click **Maintenance**, point to **Practice Setup**, and then click **Preferences**.

The **Preferences** dialog box appears.

The screenshot shows the 'Preferences' dialog box with the 'Print Options' tab selected. The dialog has a blue title bar and a close button (X) in the top right corner. The tabs are 'General Options', 'Print Options', 'Statement Forms', 'Paths', and 'Database Options'. The 'Print Options' tab contains several sections: 'Payment/Adjustment Options' with dropdowns for 'Provider' (To Guarantor's Primary Provider), 'Patient' (Family Account), and 'Split Method' (Guarantor Estimate), along with a checkbox for 'Do not auto-allocate to inactive providers' and a 'Payment Agreement Settings...' button; a note about payment allocation; 'Startup Options' with buttons for 'Automatic Updates Settings...' and 'System Startup Settings...', and a checkbox for 'Automatically Launch Office Journal'; 'Default Signature on File for New Subscribers' with checkboxes for 'Release of Information' and 'Assignment of Benefits'; and 'Additional Options' with a numeric field for 'Instances of Treatment Planner' (4), several unchecked checkboxes (Perio Beep on Entry, Suspend Patient Alerts, Suspend Treatment Area Flags, Suspend Referral Print Reminders, Hide Patient SIN), a dropdown for 'Set default dentition to primary for all new patients ages 10 and younger', checkboxes for 'Use Simple Select Patient In All Modules', 'Automatically Launch Select Patient' (checked), 'Auto View Patient Note in Family File', 'Require Referred By for new patients', and 'Require Date of Birth for new patients' (checked), and a dropdown for 'Signature Device' (Pointing Device). At the bottom are 'OK' and 'Cancel' buttons.

2. Click the **Print Options** tab.

The **Print Options** page appears.



The image shows the 'Preferences' dialog box with the 'Print Options' tab selected. The 'Print Formatting' section includes input fields for 'Left Offset' (0), 'Top Offset' (0), 'Print Delay' (0), 'Statement Count' (25), and 'Patient Note Report Count' (250). The 'Print Display Options' section has checkboxes for 'Use CDA Codes in Descriptions' (unchecked) and 'International Tooth Numbering' (checked). The 'Additional Print Options' section contains two columns of checkboxes: 'Provider ID Column on Statements/Ledger' (unchecked), 'No Insurance Flag (*) on Statements' (unchecked), 'Verify Billing Statements to Send' (unchecked), 'Copy Billing Statements to Document Center' (unchecked), 'Use Avery 5160 Mailing Labels' (unchecked), 'Mailing Labels - Skip patients who have requested no correspondence' (checked), 'Sort Claim by ID' (unchecked), 'Sort Pretreatment by ID' (unchecked), 'Print Provider Balances for Aging Report' (unchecked), 'Include Accounts with 0.00 Balance' (unchecked), 'Prompt to use CDHA Claim Format' (unchecked), 'Automatically Print iTrans Responses (including EOB)' (unchecked), and 'Automatically Print EOB only' (unchecked). The 'OK' and 'Cancel' buttons are at the bottom right.

Preferences

General Options | **Print Options** | Statement Forms | Paths | Database Options

Print Formatting

Left Offset: 0 Top Offset: 0 Print Delay: 0

Statement Count: 25 Patient Note Report Count: 250

Print Display Options

☐ Use CDA Codes in Descriptions ☒ International Tooth Numbering

Additional Print Options

☐ Provider ID Column on Statements/Ledger ☐ Sort Claim by ID

☐ No Insurance Flag (*) on Statements ☐ Sort Pretreatment by ID

☐ Verify Billing Statements to Send ☐ Print Provider Balances for Aging Report

☐ Copy Billing Statements to Document Center ☐ Include Accounts with 0.00 Balance

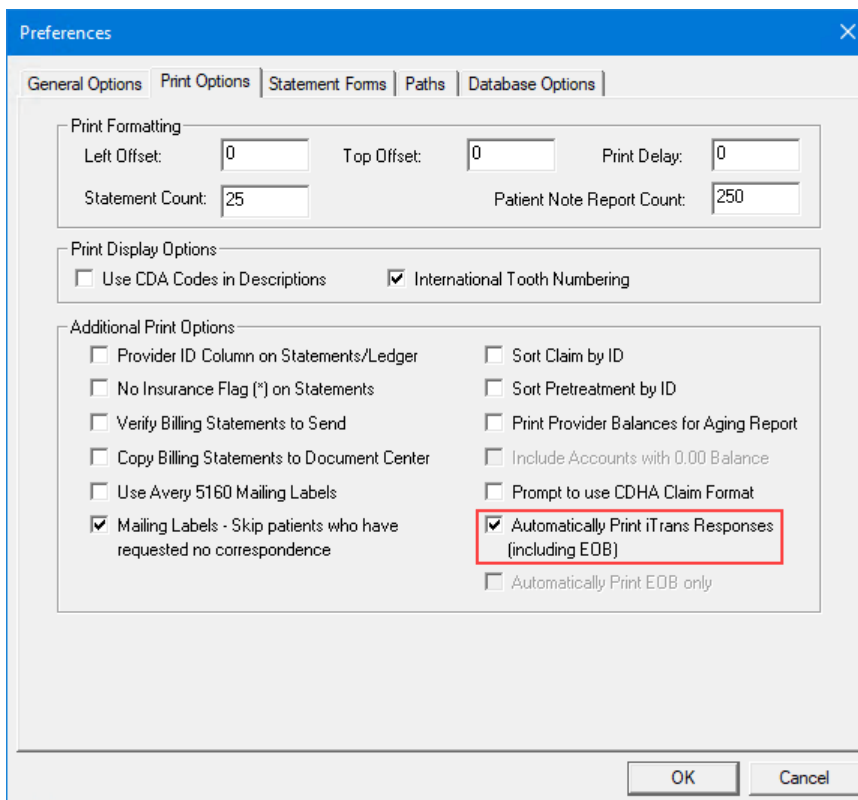
☐ Use Avery 5160 Mailing Labels ☐ Prompt to use CDHA Claim Format

☒ Mailing Labels - Skip patients who have requested no correspondence ☐ Automatically Print iTrans Responses (including EOB)

☐ Automatically Print EOB only

OK Cancel

3. Select **Automatically Print iTrans Responses (including EOB)**, and then click OK.



This image is identical to the previous one, but with the checkbox for 'Automatically Print iTrans Responses (including EOB)' checked and highlighted by a red rectangle. All other settings and the dialog box structure remain the same.

Preferences

General Options | **Print Options** | Statement Forms | Paths | Database Options

Print Formatting

Left Offset: 0 Top Offset: 0 Print Delay: 0

Statement Count: 25 Patient Note Report Count: 250

Print Display Options

☐ Use CDA Codes in Descriptions ☒ International Tooth Numbering

Additional Print Options

☐ Provider ID Column on Statements/Ledger ☐ Sort Claim by ID

☐ No Insurance Flag (*) on Statements ☐ Sort Pretreatment by ID

☐ Verify Billing Statements to Send ☐ Print Provider Balances for Aging Report

☐ Copy Billing Statements to Document Center ☐ Include Accounts with 0.00 Balance

☐ Use Avery 5160 Mailing Labels ☐ Prompt to use CDHA Claim Format

☒ Mailing Labels - Skip patients who have requested no correspondence ☒ Automatically Print iTrans Responses (including EOB)

☐ Automatically Print EOB only

OK Cancel

Dentrix 25.3 Canada

Overview and New Features

This Dentrix 25.3 Canada Release Guide provides information about the Dentrix 25.3 Canada 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 25.3 Canada.

Note: For information about using the new features in Dentrix 25.3 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.3 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.3 Canada includes the following enhancements:

MISCELLANEOUS

- (Beta only) In the Appointment Book, the **Add a New Patient** dialog box has been redesigned allowing you to enter all the new patient information you need to create a minor’s new patient file while simultaneously creating an appointment for a new patient. The redesigned **Add a New Patient** dialog box was also added to the Family File to streamline the process for creating a minor’s new patient file.
- In the Office Manager, you can now replace the default operatory titles in the Appointment Book with more descriptive ones, and in the **Setup View** dialog box in Appointment Book, you can change the order of the columns to be more reflective of how your office is set up.
- In the Office Manager, the **Practice Resource Setup** dialog box has been modified to make setting up resources in Dentrix more intuitive.

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

You can schedule new patient appointments for minors from the Appointment Book and create a new family account in the Family File simultaneously.

1. In the Appointment Book, locate an open schedule space, and then double-click the appropriate operator at the desired time.

The **Select Patient** dialog box appears.

Select Patient

Search By:

- ☒ Last Name (Last, First)
- ☐ Phone
- ☐ First Name (First, Last)
- ☐ Chart #
- ☐ Preferred Name
- ☐ SIN

Show On Screen Keyboard

Enter Last Name (Last, First):

HoH	Last Name /	First Name	MI	Preferred Name	Phone	Chart #	SIN	Birthday

< >

Previously Selected Patients

	HoH	Last Name	First Name	MI	Preferred Name	Phone	Chart #	SIN	Birthday	
▶	*	Murray	James			(746)555-0982 [M]			1995-10-13	▲
	*	Allard	Nathalie	J	Nat	(514)555-8596 [H]		595-745-856	1983-04-01	
	*	Crosby	Brent	L			CRO101		1965-05-17	
	*	Caims	George			(705)555-6543 [H]			1976-07-27	▼

< >

More Info New Patient Create Appointment Cancel

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 Patient**.

The **Add a New Patient** dialog box appears.

Add a New Patient

Patient Details [More Info](#)

Patient Details

First Name * Last Name *

Birthdate * Gender

Please use DD/MM/YYYY format.

Family File

Select an option to add the patient to a family file *

☒ Create New Family ☐ Add to an Existing Family

Provider Information

Primary Provider *

Contact Details

Email address Mobile Phone Number

Referred By

Referral Source

CANCEL **SAVE PATIENT**

3. Provide the following mandatory information:

- Type the patient's First and Last names in the corresponding fields.
- Type the patient's **Birthdate**.

If the new patient is a minor, an additional option appears under Family File in the **Add a New Patient** dialog box.

Add a New Patient

Patient Details More Info

Patient Details

First Name * Last Name *

Birthdate * Gender

Please use DD/MM/YYYY format.

Family File

Select an option to add the patient to a family file *

☒ Create New Family ☐ Add to an Existing Family

Is this minor the head of household?

☒ Yes ☐ No

Provider Information

Primary Provider *

Contact Details

Email address Mobile Phone Number

Referred By

Referral Source

- Select one of the following options:
 - **Create New Family** – Creates a new family.
 - **Add to an Existing Family** – Adds the new patient as a member of an existing family.
- **Is this minor the head of household?** – Select **Yes** or **No**.

Note: You might consider a minor as the head of household if the minor was the only patient.

If you select **No**, the **Head of Household Details** section appears in the **Add a New Patient** dialog box.

Add a New Patient

Patient Details [More Info](#)

Select an option to add the patient to a family file *

☒ Create New Family ☐ Add to an Existing Family

Is this minor the head of household?

☐ Yes ☒ No

Head of Household Details

First Name * Last Name *

Birthdate * Please use DD/MM/YYYY format. Gender

Provider Information

Primary Provider *

Contact Details

Email address Mobile Phone Number

Referred By

Referral Source

- Select the new patient's **Primary Provider** from the provider list.
- If desired, provide the following information:
 - Select the patient's **Gender**.
 - Type the patient's **Email address**.
 - Type the patient's **Mobile Phone Number**.
 - Select the patient's **Referral Source**.
 - To complete the new patient's contact information, click **More Info**. The **More Info** page appears.

Add a New Patient

Patient Details More Info

Contact Information

Street Address

City Province Postal Code

Home Phone Other Phone

Emergency Contact

Emergency Contact Emergency Contact #

CANCEL SAVE PATIENT

6. Enter following patient information:
- **Street Address** – The patient's street address.
 - **City** – The patient's city.

The City Information dialog box appears.

City Information

Enter: PC

By City PC

List All

K9L-5T5	Winnipeg	MB
L4N-8M3	Barrie	ON
L5S-8G6	Brandon	MB
L8N-4R6	Hamilton	ON
M3V-2H3	Kitchener	ON
N6V-4B5	Toronto	AB
N7G-8K6	Ottawa	ON
N9H-7S6	London	ON
N9K-0Y7	Toronto	ON
R3D-3J7	Montreal	PQ
R3S-8I9	Victoria	BC
R6V-5T4	Regina	SK

Delete New Select Close

- **Province** – The patient's province.
- **Postal Code** – The patient's Postal Code.
- **Home Phone** –
- **Other Phone** –
- **Emergency Contact** – Name of the patient's emergency contact.
- **Emergency Contact #** – Emergency contact's phone number.

7. Click **SAVE PATIENT**.

A family account for the new patient is created in the Family File, and the **Appointment Information** dialog box appears.

The screenshot shows the 'Appointment Information - (Stephens, Brad) <New Patient>' dialog box. It contains several sections:

- Provider:** JLD1, with a dropdown arrow.
- Continuing Care:** empty field with a dropdown arrow.
- Add'l Provider:** empty field with a dropdown arrow.
- Use Reason to Auto Update CC:** checked checkbox.
- Reason:** A list box containing 'Initial', 'Pc', and 'Exam Permanent'. Buttons for 'Delete', 'Del. All', 'Add Tx', and 'Misc.' are present.
- Appointment Description:** NP Perm.
- Appt Length:** 60 min.
- Amount:** 56.94.
- Status:** <none>.
- Op:** OP-1.
- Eligible:** empty field.
- Schedule:** FIDED.
- Date:** 2025-02-04.
- Staff:** empty field.
- Type:** General.
- Time:** 9:00am.
- Notes:** A large text area with an 'Insert Dateline' button and a red checkmark icon.
- Checkboxes at the bottom:**
 - ☐ Xrays Rec'd
 - ☐ Finances/Ins. Info
 - ☐ Parking/Directions
 - ☐ No Show
 - ☐ Canceled w/o Notice
 - ☐ Canceled w/ Notice
- Right-hand buttons:** Created, Last Changed, History..., More Info (Dial), Patient Info, Other Appt(s), Ins Claim Info, Schd. Next, Wait/Will Call, Find, Pinboard, Lab Case, Patient Lab Cases, OK, Cancel.

8. Schedule the new patient's appointment, and then click **OK**.

The **Appointment Information** dialog box closes, the appointment information is saved, and the appointment is added to the Appointment Book.

Setting Up Views

In Dentrux, you can create up to twelve separate views on each computer in your office with unique view settings for providers, operators, calendars, and appointment display information. Views are computer-specific, making it possible for you to see different information when you are in a hygiene operator than when you are at the front desk or at another computer on the network.

To set up a view

1. In the Appointment Book, click **View**.

The **Select View** dialog box appears.

The screenshot shows the 'Select View' dialog box. It has a large empty rectangular area on the left. On the right side, there are four buttons stacked vertically: 'Select', 'Edit', 'New', and 'Delete'. At the bottom of the dialog box, there are two buttons: 'OK' and 'Cancel'.

2. Click **New**.

The **Setup View** dialog box appears.

3. Do the following:

- **Provider(s)** – Select the providers you want to assign to this view.
- **Month Time View** – Type a start and an end time.
- **Select Days** – Select the days of the week that you work.
- **Operators** – From the **Hidden** column, select the operators you want to view, and then click **Add** to add them to the **Displayed** column. To change the order of the displayed operators in the Appointment Book, click **Move Up** or **Move Down** until the operators are in the order you desire.

Note: You can view up to 20 operators at a time.

4. Depending on the length of an appointment, up to nine lines of information can appear on the face of an appointment. The **Appointment Display Info** option allows you to customize and prioritize the text lines for each appointment.

In each **Line #** box, select the information that you want to display on that line.

- **[None]** – Inserts a blank line.
- **Name** – Displays the patient's name. Typically this item is assigned to the first position.

- **Appt Reason** – Displays the reason for the appointment. If you frequently schedule several different procedures in an appointment, you can use two or three back-to-back lines for the Appointment Reason item. That way, if the description will not fit on one line, Dentrix will wrap it to the next line. (The wrap ability is limited to the Appointment Reason item.)
- **Phone** – Displays the patient's home phone number.
- **Provider** – Displays the provider ID.
- **Amount** – Displays the production amount for the appointment.
- **Appt Type** – Displays the appointment type (general or high, medium, or low production).
- **Staff** – Displays the staff member assigned to the appointment.
- **Work Phone** – Displays the patient's work phone number.
- **SIN #** – Displays the patient's Social Insurance Number.
- **Pref Name** – Displays the patient's preferred name. (Do not substitute preferred name for name, since the line is left blank if the patient does not have a preferred name.)
- **Chart Num** – Displays the patient's Chart Number on the appointment.
- **Name/Pref** – Displays the patient's first name and preferred name on the same line.
- **Referred By** – Displays the patient's referral source.

Note: On average, most appointments display two to four information lines; therefore, assign the most important items to the first lines.

5. Select one or more of the following:

- **View Operatory Title** – Replaces the operatory ID with the operatory title as the description at the top of each column in the Appointment Book. If you select this option, and you have not assigned a title to an operatory, the operatory displays the ID instead of appearing blank. You can edit or assign operatory titles in the **Practice Resource Setup** dialog box.
- **View Amount** – Adds a small box to the upper-right corner of the Appointment Book that displays the scheduled production amount for the day, week, or month depending on the selected view.

Note: Production amounts are rounded to the nearest dollar and camouflaged by adding a zero in front of the amount, making it less likely that patients will associate the number with revenue.

- **View Appt Notes** – Adds a note symbol in the upper-right corner of any appointment that you assigned an Appointment Note to.
- **View Alerts** – Adds a red cross in the upper-right corner of an appointment for patients with medical conditions or allergies.
- **View Provider Columns** – Adds color-coded columns to the left side of the Appointment Book corresponding to providers and their appointment blocks. Clear the checkbox to remove the columns.

6. To save your settings, click OK.

Adding or Editing Operatories

Dentrix comes pre-set with following default operatories: OP-1, OP-2, OP-3, and so on. Through the **Practice Resource Setup** dialog box, you can add, edit, or rearrange operatories to suit your preferences.

Note: The **Practice Resource Setup** dialog box was redesigned in this release of Dentrix to make setting up your practice resources more intuitive.

To add, edit, or rearrange an operator

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

The **Practice Resource Setup** dialog box appears.

Practice Resource Setup

Operatories

Search Operatories

MANAGE **+ ADD**

ID	Title
OP-1	Operator 1
OP-2	Operator 2
OP-3	Operator 3
OP-4	Operator Four
OP-5	Operator Five

Providers

Search Providers ☐ Show Inactive

MANAGE **+ ADD**

ID	Name	Title	Class
JHY1	Donna S. Mills	R.D.H.	Secondary
JLD1	James L. Davidson	D.D.S.	Primary
MHY1	Helen W. Patton	R.D.H.	Secondary
MJL1	Michael J. Lang	DDS	Primary

Staff Members

Search Staff Members ☐ Show Inactive

MANAGE **+ ADD**

ID	Name	Title	Class
CDA1	Nancy Hill	CDA Level II	Staff
PT01	Suzan I. Goodstaff	Part time reception	Staff
ST01	Gail Smith	Admin	Staff

Henry Schein Dental Clinic

345 Townline Road
Niagara On The Lake, ON L0S-1J0
(905) 646-1711

Administrative Contact: Not Set
HIPPA Officer: Not Set
Fiscal Year: January
Bank Number: 2345-003

2. Under **Operatories**, do one of the following:
 - To create a new operatory, click **Add**.
 - To edit an operatory, select one from the list, click **Manage**, and then click **Edit Operatory**.

The **Operatory Information** dialog box appears.

Operatory Informa...

ID:

Operatory Title:

Tip: By default, operatories in the Appointment Book appear alphabetically according to their IDs. To can change that, refer to "Setting Up Views" in this Release Guide.

3. If you are adding an operatory, type an ID for the operatory.

Note: IDs are limited to four alphanumeric characters and must be unique. Once you create an operator, you cannot edit the ID in the **ID** field.

4. To change the **Operator Title** from the default to a more descriptive one, type a new name, such as the dentist's or hygienist's.

Note: When you are setting views in the Appointment Book, selecting **View Operator Title** replaces the default operator ID as the description at the top of each Appointment Book column.

5. Click **OK**.

Dentrix 25.2 Canada

Overview and New Features

This Dentrix 25.2 Canada Release Guide provides information about the Dentrix 25.2 Canada 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 25.2 Canada.

Note: For information about using the new features in Dentrix 25.2 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.2 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.2 Canada includes the following enhancements:

MISCELLANEOUS

- In the Appointment Book, the **Add a New Patient** dialog box has been redesigned to allow you to enter all the new patient information you need to create a new patient file while simultaneously creating an appointment for the new patient. The redesigned Add a New Patient dialog box was also added to the Family File to streamline the process for creating a new patient.
- A minimum size limit was added to the Appointment Book to prevent the What’s New, Chat, and Practice Notifications icons from being hidden when you re-size the Appointment Book.
- If you re-size and/or relocate the Practice Notifications window and then close the Practice Notifications window or the Appointment Book, the Practice Notifications window reopens in the same size and location as you closed it.
- In the Signature Manager, the **Note Date** in Clinical Notes is now the same date as the appointment date.

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 features and enhancements, refer to the Dentrix Help.

Scheduling New Patient Appointments

You can schedule an appointment for a new patient from the Appointment Book and create a new family account in the Family File simultaneously.

To schedule a new patient appointment

1. In the Appointment Book, locate an open schedule space, and then double-click the appropriate operatory at the desired time.

The **Select Patient** dialog box appears.

Select Patient

Search By: **Appointments** | Advanced Search

Show On Screen Keyboard

☒ Last Name (Last, First)
 ☐ Phone
☐ First Name (First, Last)
 ☐ Chart #
☐ Preferred Name
 ☐ SIN

Enter Last Name (Last, First):

HoH	Last Name	First Name	MI	Preferred Name	Phone	Chart #	SIN	Birthday

Previously Selected Patients

HoH	Last Name	First Name	MI	Preferred Name	Phone	Chart #	SIN	Birthday
*	Murray	James			(746)555-0982 [M]			1995-10-13
*	Allard	Nathalie	J	Nat	(514)555-8596 [H]		595-745-856	1983-04-01
*	Crosby	Brent	L			CRO101		1965-05-17
*	Caims	George			(705)555-6543 [H]			1976-07-27

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 Patient**.

The **Add a New Patient** dialog box appears.

Add a New Patient

Patient Details [More Info](#)

Patient Details

First Name * Last Name *

Birthdate * Gender

Please use DD/MM/YYYY format.

Family File

Select an option to add the patient to a family file *

☒ Create New Family ☐ Add to an Existing Family

Provider Information

Primary Provider *

Contact Details

Email address Mobile Phone Number

Referred By

Referral Source

CANCEL **SAVE PATIENT**

3. Provide the following mandatory information:
 - Type the patient's First and Last names in the corresponding fields.
 - Type the patient's **Birthdate**.
 - Select one of the following options:
 - **Create New Family** – Creates a new family.
 - **Add to an Existing Family** – Adds the new patient as a member of an existing family.
 - Select the new patient's **Primary Provider** from the provider list.
4. Provide the following information:
5. To complete the new patient's contact information, click **More Info**.
The **More Info** page appears.

Add a New Patient

Patient Details More Info

Contact Information

Street Address

City Province Postal Code

Home Phone Other Phone

Emergency Contact

Emergency Contact Emergency Contact #

CANCEL SAVE PATIENT

6. Enter following patient information:
 - **Street Address** – The patient’s street address.
 - **City** – The patient’s city.

The City Information dialog box appears.

City Information

Enter: PC

By City PC

List All

City	Province	Postal Code
K9L-6T5	Winnipeg	MB
L4N-8M3	Barrie	ON
L5S-8G6	Brandon	MB
L8N-4R6	Hamilton	ON
M3V-2H3	Kitchener	ON
N6V-4B5	Toronto	AB
N7G-8K6	Ottawa	ON
N9H-7S6	London	ON
N9K-0Y7	Toronto	ON
R3D-3J7	Montreal	PQ
R3S-8I9	Victoria	BC
R6V-5T4	Regina	SK

Delete New Select Close

- **Province** – The patient’s province.
 - **Postal Code** – The patient’s Postal Code.
 - **Home Phone** –
 - **Other Phone** –
 - **Emergency Contact** – Name of the patient’s emergency contact.
 - **Emergency Contact #** – Emergency contact’s phone number.
7. Click **SAVE PATIENT**.

A family account for the new patient is created in the Family File, and the **Appointment Information** dialog box appears.

The screenshot shows the 'Appointment Information - (Stephens, Brad) <New Patient>' dialog box. The interface includes the following sections:

- Provider/Continuing Care:** Fields for 'Provider' (JLD1) and 'Continuing Care'.
- Add'l Provider:** A field for additional providers.
- Reason:** A section with buttons for 'Initial', 'Pc', 'Exam Permanent', 'Delete', 'Add Tx', 'Misc.', and 'Del. All'. A checkbox 'Use Reason to Auto Update CC' is checked.
- Appointment Description:** A text field containing 'NP Perm'.
- Appt Length:** A field set to '60 min'.
- Amount:** A field set to '56.94'.
- Status:** A dropdown menu set to '<none>'.
- Op:** A dropdown menu set to 'OP-1'.
- Eligible:** A checkbox that is unchecked.
- Schedule:** A dropdown menu set to 'FIXED'.
- Date:** A field set to '2025-02-04'.
- Staff:** A field with a dropdown arrow.
- Type:** A dropdown menu set to 'General'.
- Time:** A field set to '9:00am'.
- Notes:** A large text area with an 'Insert Dateline' button and a red checkmark icon.
- Bottom Checkboxes:**
 - ☐ Xrays Rec'd
 - ☐ Finances/Ins. Info
 - ☐ Parking/Directions
 - ☐ No Show
 - ☐ Canceled w/o Notice
 - ☐ Canceled w/ Notice
- Right Panel:** A vertical stack of buttons including 'Created', 'Last Changed', 'History...', 'More Info (Dial)', 'Patient Info', 'Other Appt(s)', 'Ins Claim Info', 'Schd. Next', 'Wait/Will Call', 'Find', 'Pinboard', 'Lab Case', 'Patient Lab Cases', 'OK', and 'Cancel'.

8. Schedule the new patient's appointment, and then click **OK**.

The **Appointment Information** dialog box closes, the appointment information is saved, and the appointment is added to the Appointment Book.

Dentrix 25.1 Canada

Overview and New Features

This Dentrix 25.1 Canada Release Guide provides information about the Dentrix 25.1 Canada 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 25.1 Canada.

Note: For information about using the new features in Dentrix 25.1 Canada, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s New in Dentrix 25.1 Canada?” in the Dentrix Help. For information on installing Dentrix Canada, refer to the Installation Guide.

New Features

Dentrix 25.1 Canada includes the following enhancements:

MISCELLANEOUS

- Dentrix Smart Image has been updated to include the modality view, which introduces a new level of flexibility and efficiency to viewing intraoral images. From the modality view, you can navigate intraoral X-ray and intraoral image stacks.
- System requirements minimums have been updated in the Dentrix Installer.
- The Canadian Dental Association’s CDA codes have been updated for 2025. If you have an active Dentrix Customer Service Plan and use Dentrix G7.5 or later, Dentrix automatically downloads and installs the new codes.

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 features and enhancements, refer to the Dentrix Help.

Dentrix Smart Image

Dentrix Smart Image has been updated to include the modality view, which introduces a new level of flexibility and efficiency to viewing intraoral images. From the modality view, you can navigate intraoral X-ray and intraoral image stacks.

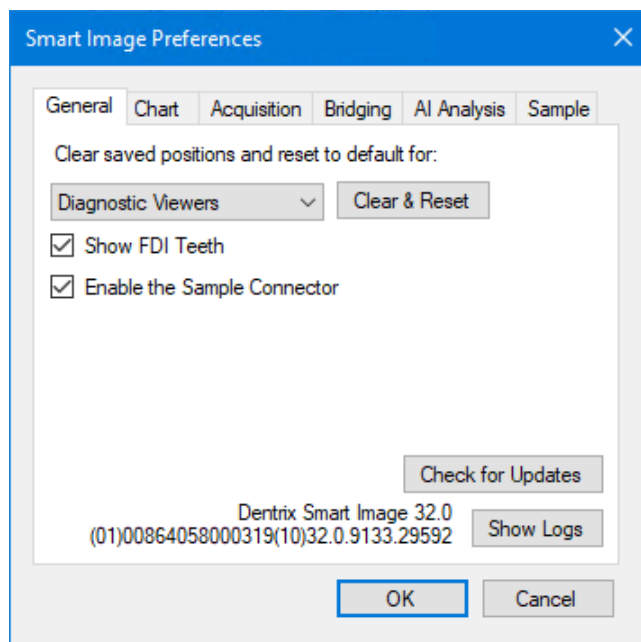
SWITCHING TO THE MODALITY VIEW

The modality view introduces a new level of flexibility and efficiency to imaging workflows. The modality view is only valid for intraoral X-ray and intraoral color photographs and defaults to FMX 18.

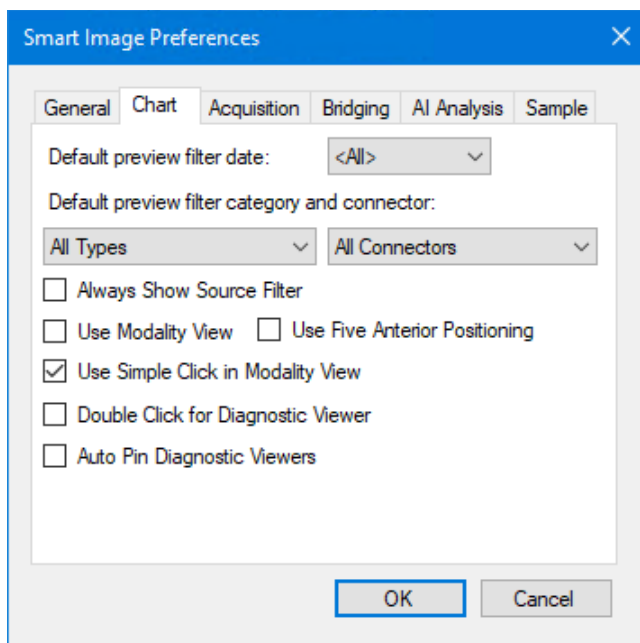
To switch to the modality view

1. In the **Smart Image** panel, click the Show Smart Image Preferences button.

The **Smart Image Preferences** dialog box appears.



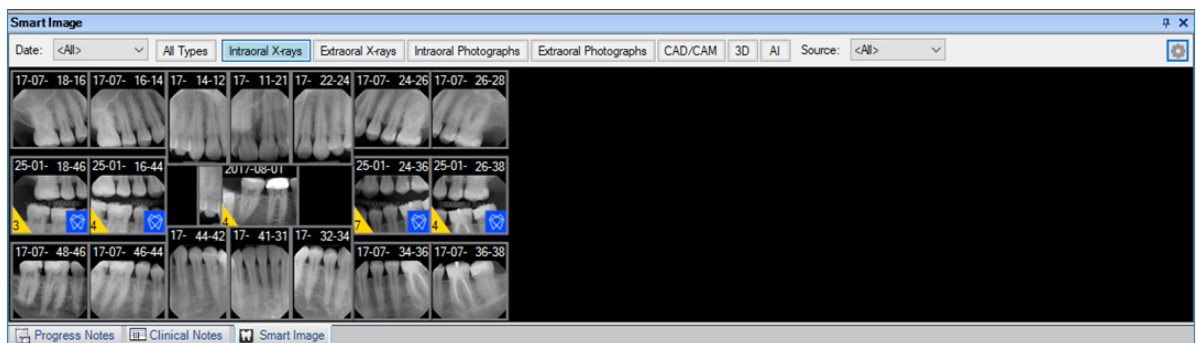
2. Click the **Chart** tab.



3. Select **Use Modality View**, and then click **OK**.

The **Smart Image** panel switches to the modality view for **Intraoral X-rays** and **Intraoral Photographs**.

Note: Multiple images of the same image are stacked from the most to the least recent. You can navigate through these stacked images so you can compare subtle changes and details in the same area across different images taken over time.



4. To switch back to the default view, open the **Smart Image Preferences** dialog box, clear the **Use Modality View** checkbox, and then click **OK**.

NAVIGATING IMAGE STACKS

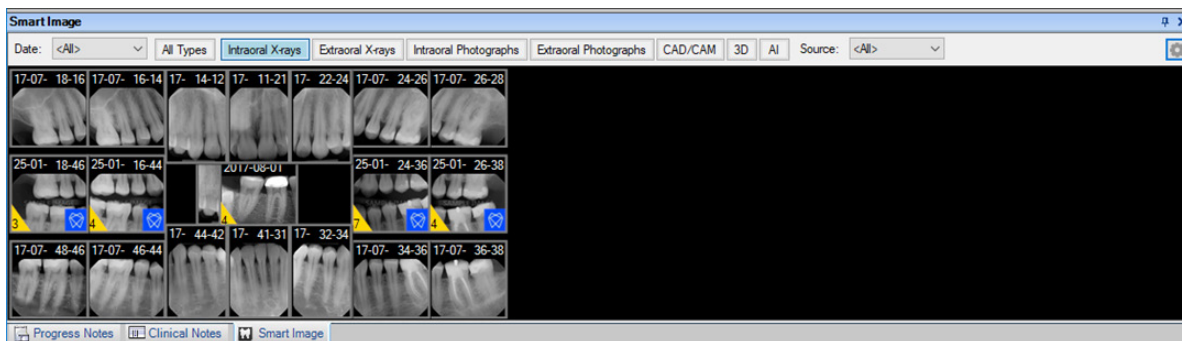
An “image stack” refers to a collection of images that are grouped together by tooth number in the same exam. This grouping facilitates a layered display within the imaging software, allowing you to navigate through the images by using the UI controls. The arrangement of the stack ensures that the most 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

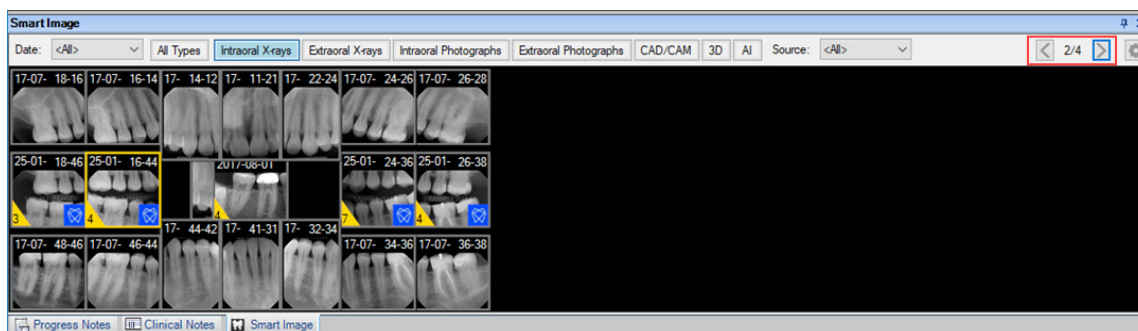
1. Switch to the modality view.

The **Smart Image** panel switches to the modality view for **Intraoral X-rays** and **Intraoral Photographs**.

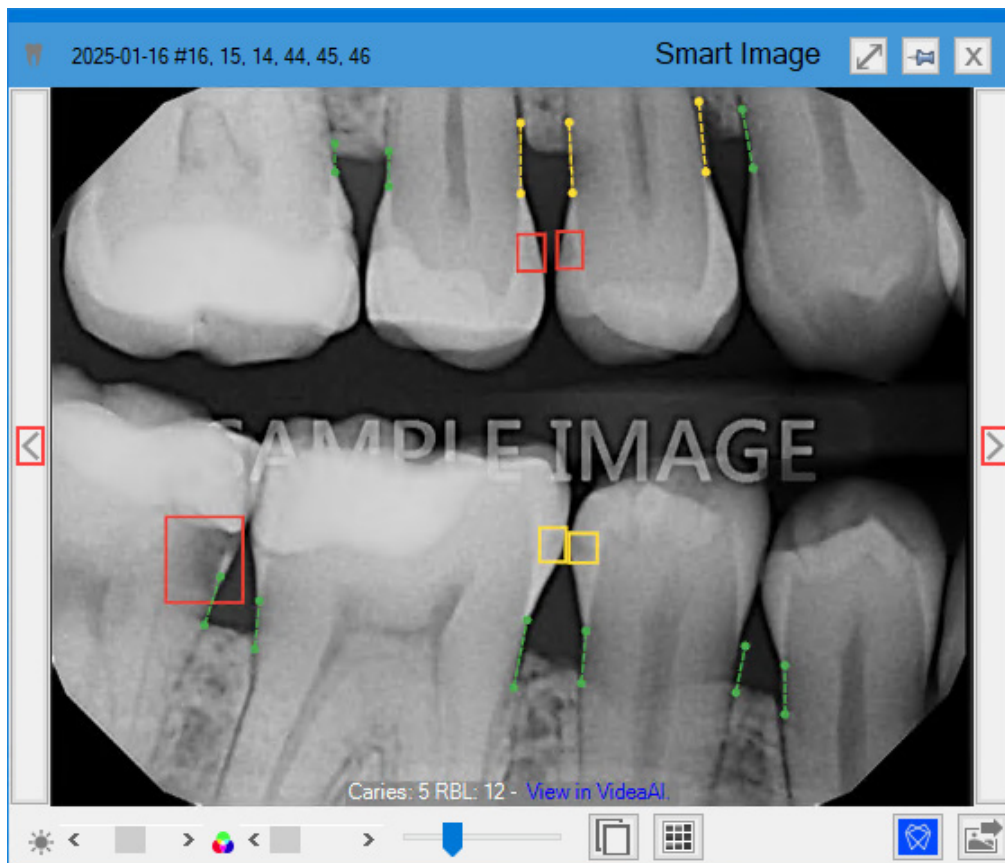
Note: Image stacks are indicated by a number inside a yellow triangle in the bottom-left corner of the image thumbnail.



2. To navigate the image stack, do one of the following:
 - Click the stack that you want to navigate, and then click the desired arrow in the upper-right corner of the Smart Image panel to navigate the selected thumbnail images.



- Click the stack a second time to open the Diagnostic Viewer. Click the arrows to navigate the images.

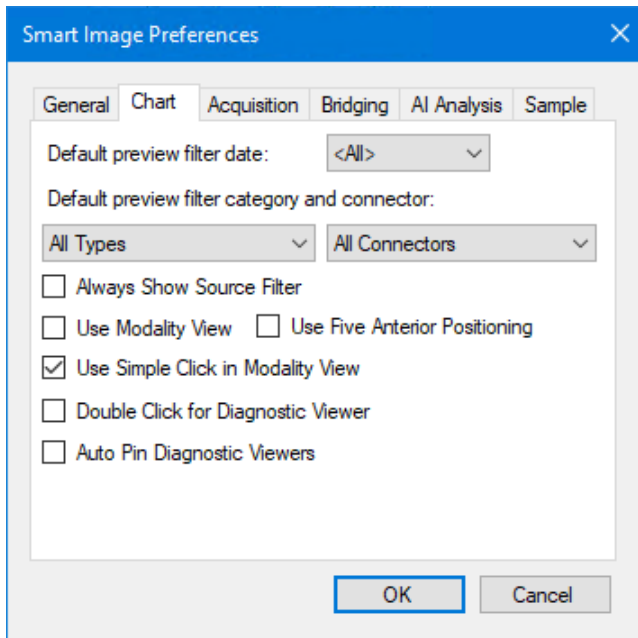


ENABLING FIVE ANTERIOR POSITIONING

The Five Anterior Positioning option allows you to look at five anterior views as opposed to the standard three views of FMX 18.

To enable five anterior positioning

1. Switch to the modality view.
2. Click the **Chart** tab.



3. Select **Use Five Anterior Positioning**, and then click **OK**.

The modality view in the **Smart Image** panel changes to **Five Anterior Positioning** or FMX 21.

