

Dentrix 2026

RELEASE GUIDE

Includes information about new features and enhancements
in the following versions of Dentrix: 26.10, 26.8, 26.7, 26.6,
26.5, 26.4, 26.3, 26.2, 26.1

PUBLICATION DATE

May 2026

COPYRIGHT

© 1987-2026 Henry Schein One. All rights reserved. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language in any form by any means without the prior written permission of Henry Schein One.

SOFTWARE LICENSE NOTICE

Your license agreement with Henry Schein One, which is included with the product, specifies the permitted and prohibited uses of the product. Any unauthorized duplication or use of Dentrix by Henry Schein One in whole or in part, in print, or in any other storage and retrieval system is forbidden.

LICENSES AND TRADEMARKS

Henry Schein One, the Henry Schein One logo, and Dentrix are registered trademarks of Henry Schein One. Microsoft and Windows are registered trademarks of Microsoft Corporation.

Contents

- Dentrix 26.10 1
- Overview and New Features..... 2
 - New Features 2
- Using the New Features and Enhancements 3
 - Opening the Redesigned Family File 3
 - Dentrix Imaging 4
- Dentrix 26.8 1
- Overview and New Features..... 2
 - New Features 2
- Using the New Features and Enhancements 3
 - Opening the Redesigned Family File 3
 - Claims Manager 3
 - Practice Pay 5
 - Redesigned Insurance Claim Window 9
- Dentrix 26.7 1
- Overview and New Features..... 2
 - New Features 2
- Using the New Features and Enhancements 3
 - Opening the Redesigned Family File 3
 - Previewing the Redesigned Ledger 4
 - Dental Savings Plans from DentalPlans 7
- Dentrix 26.6 1
- Overview and New Features..... 2
 - New Features 2
- Using the New Features and Enhancements 3
 - Opening the Redesigned Family File 3
 - Previewing the Redesigned Ledger 4
 - Dentrix Imaging 7
 - Dentrix Forms..... 8
- Dentrix 26.5 1
- Overview and New Features..... 2
 - New Features 2

Using the New Features and Enhancements	3
Opening the Redesigned Family File	3
Previewing the Redesigned Ledger	3
Dentrix Imaging	6
Dentrix 26.4	1
Overview and New Features.....	2
New Features	2
Using the New Features and Enhancements	3
Opening the Redesigned Family File	3
Previewing the Redesigned Ledger	3
Forms	6
Dentrix 26.3	1
Overview and New Features.....	2
New Features	2
Using the New Features and Enhancements	3
Opening the Redesigned Family File	3
Claims Manager	3
Enabling Surcharging in Dentrix Pay.....	7
Dentrix 26.2	1
Overview and New Features.....	2
New Features	2
Using the New Features and Enhancements	3
Opening the Redesigned Family File	3
Entering Itemized Payments in the Redesigned Insurance Claim Window.....	3
Running the Family Ledger Report	7
Dentrix Imaging	9
Dentrix 26.1	1
Overview and New Features.....	2
New Features	2
Using the New Features and Enhancements	3
Opening the Redesigned Family File	3
Previewing the Redesigned Insurance Claim Window.....	4
Patient Chart	7
Health History.....	8
Eligibility Disclaimer	10

Dentrix 26.10

Overview and New Features

This Dentrix 26.10 Release Guide provides information about the Dentrix 26.10 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 26.10.

Note: For information about using the new features in Dentrix 26.10, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s new in Dentrix 26.10?” in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 26.10 includes the following enhancements:

THE REDESIGNED FAMILY FILE

A guided tour of the redesigned Family File is now available. We invite your feedback. For more information, please refer to [Previewing the new Family File](#) in the Dentrix Help.

DENTRIX IMAGING

- In Comparison mode, the size of the layout changes dynamically as you add or remove images.
- The buttons in the Ortho Report were modified to be more visible.
- The **About Imaging** dialog box was modified for the United Kingdom, Australia, and Canada markets.
- The Videa name and logo were modified to reflect Videa’s rebrand.

SMART IMAGE

- The Smart Image viewer was modified to reflect Videa’s rebranding.

Using the New Features and Enhancements

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

Opening the Redesigned Family File

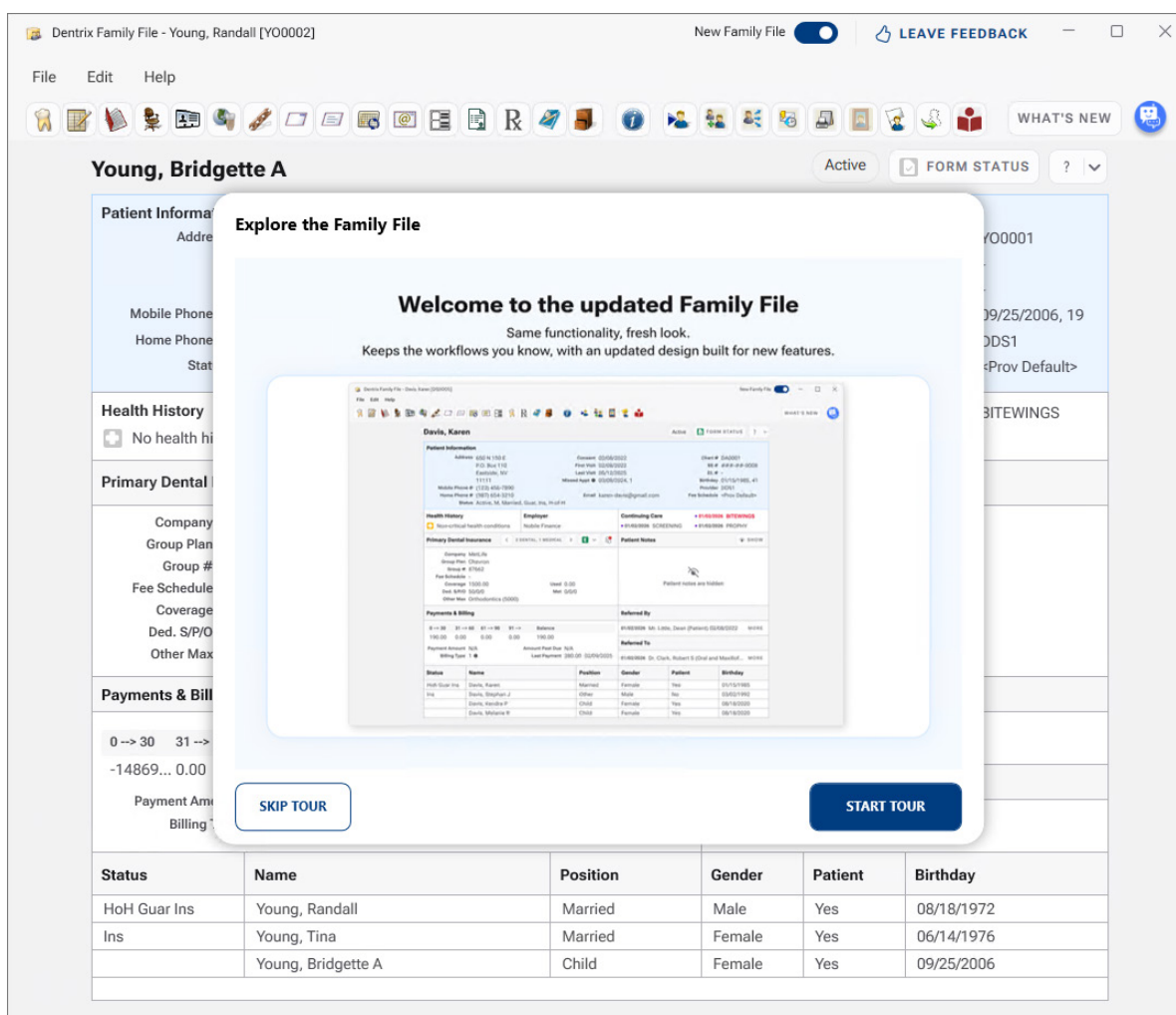
At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. The cards in the redesigned Family File have now been rearranged to mirror the layout of the legacy Family File window.

Note: 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 open the redesigned Family File

1. From your desktop, double-click the Family File icon, and then from the **Select Patient** dialog box, select the desired patient.

The redesigned Family File appears.



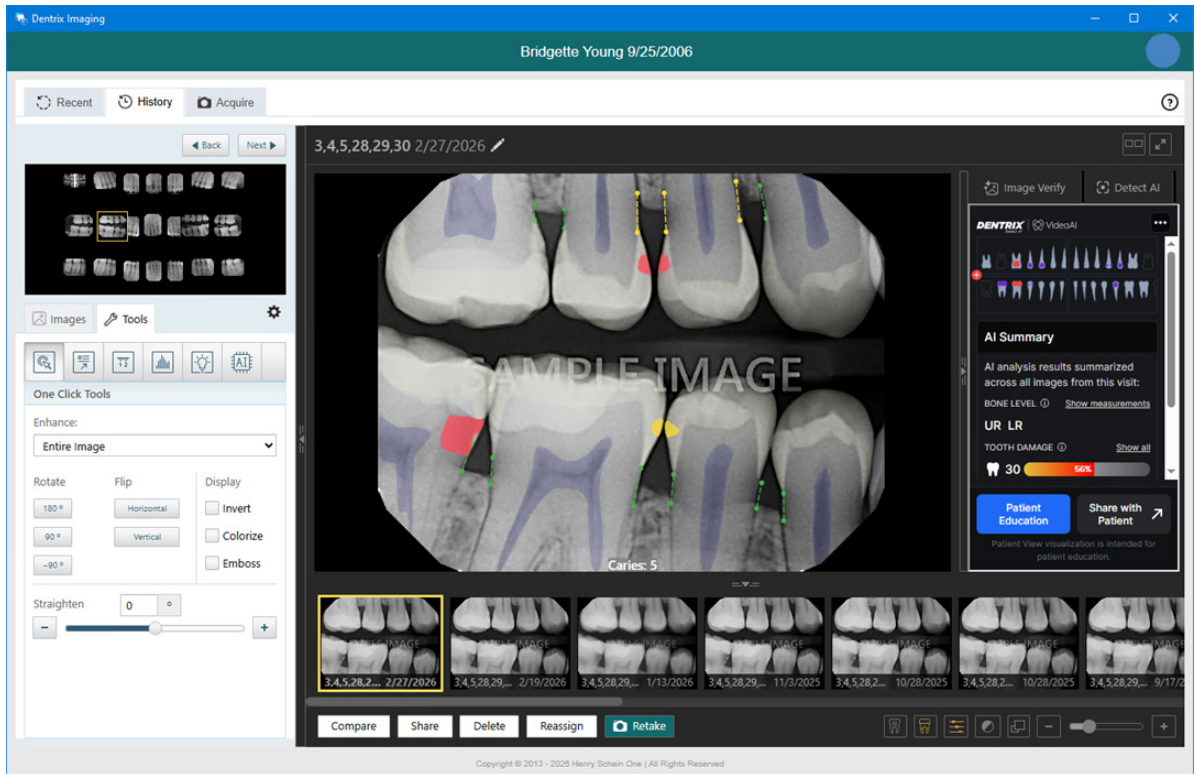
Dentrix Imaging

In Comparison mode, the size of the layout changes dynamically as you add or remove images.

To compare images

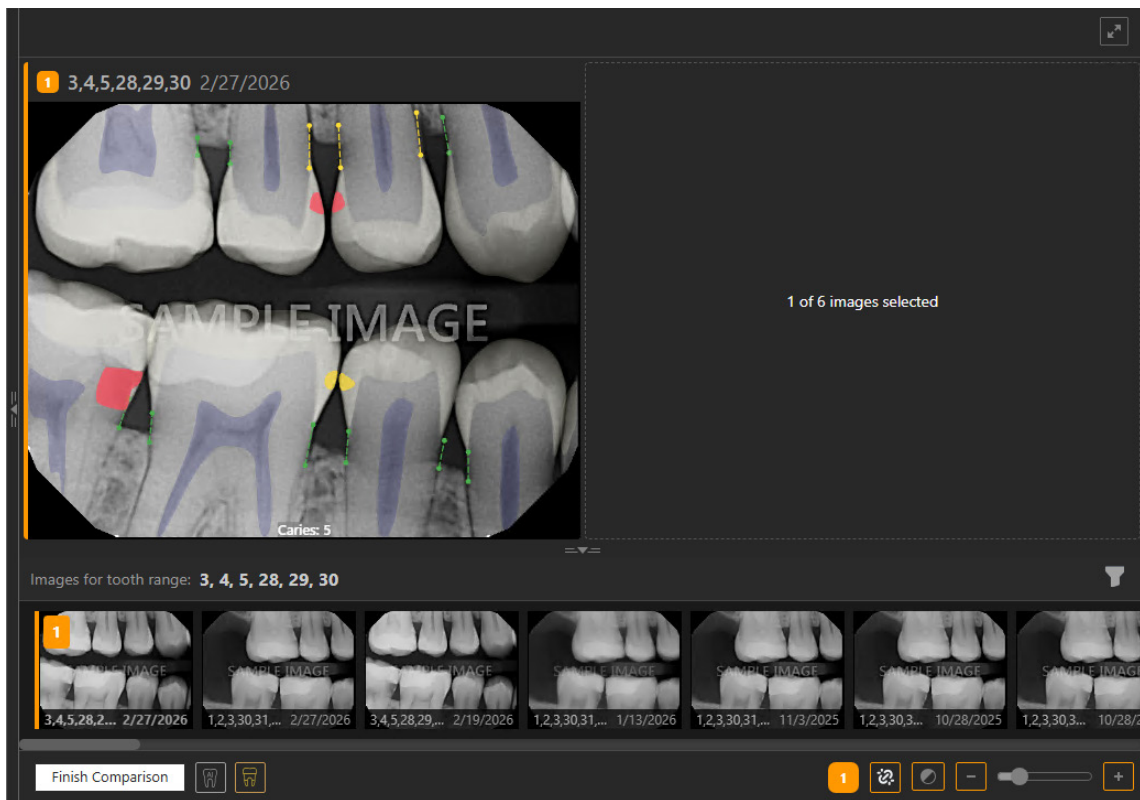
1. Open the Patient Chart and select a patient.
2. In the Imaging toolbar, click the Launch Dentrix Imaging icon.

The Dentrix Imaging window appears.

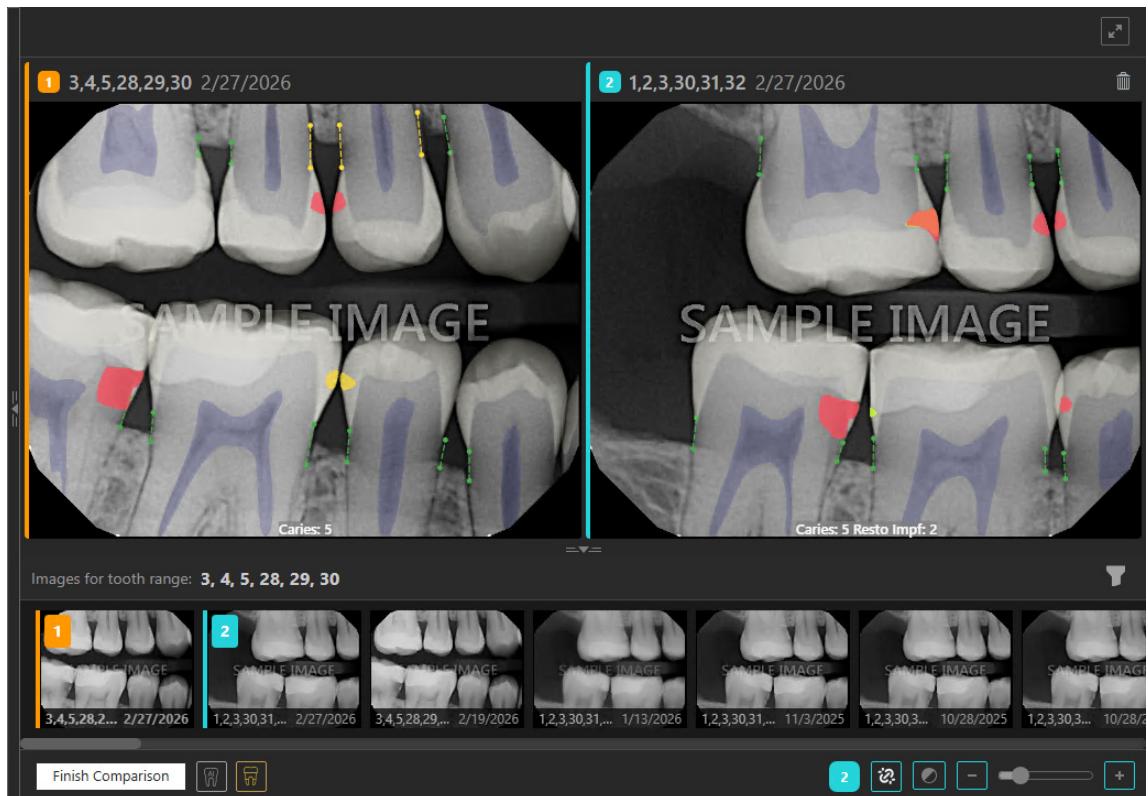


3. Click **Compare**.

The images that have tooth numbers in common with the selected image (the "Original") appear on the Images for tooth range panel. By default, the most recent image appears in the Compare panel.



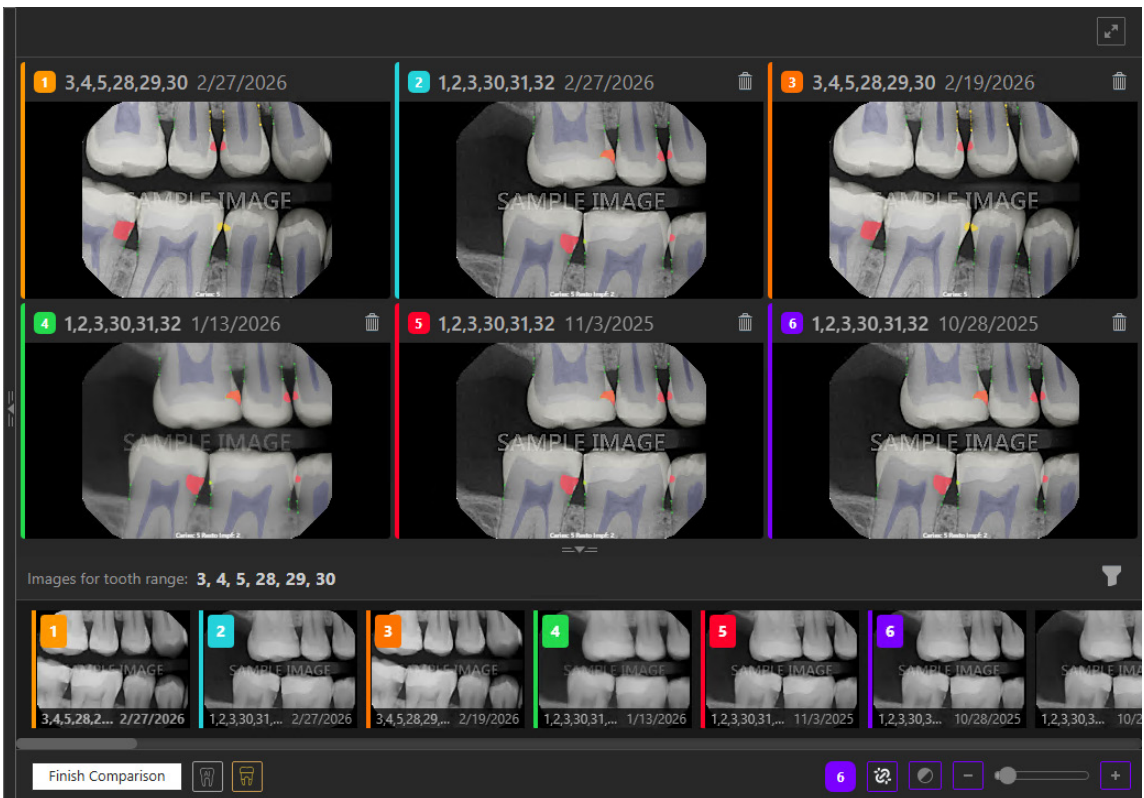
- a. To compare the most recent image to a second image, click the desired image.



- b. To compare three or four images, click another one or two desired images.



c. To compare five or six images, click another one or two desired images.



Note: If you are using Dentrix Detect AI, those results will also appear when you compare images.

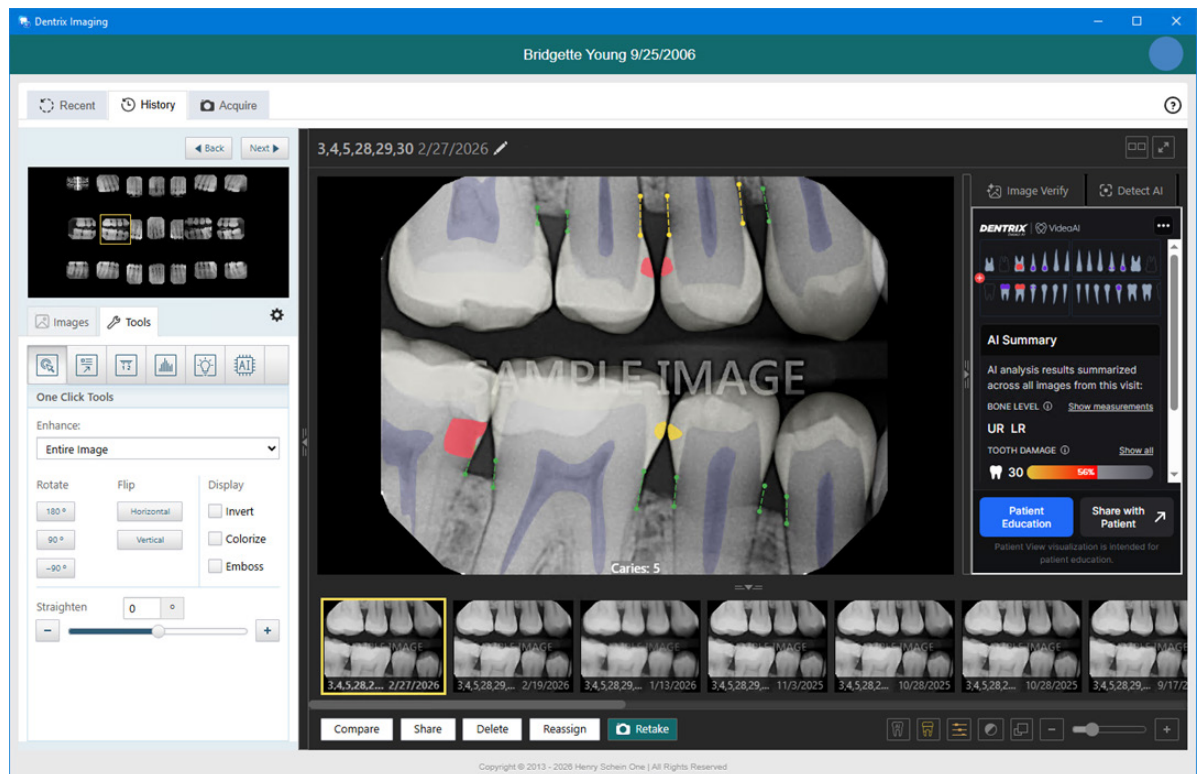
ORTHO REPORT

The buttons in the Ortho Report were modified to be more visible.

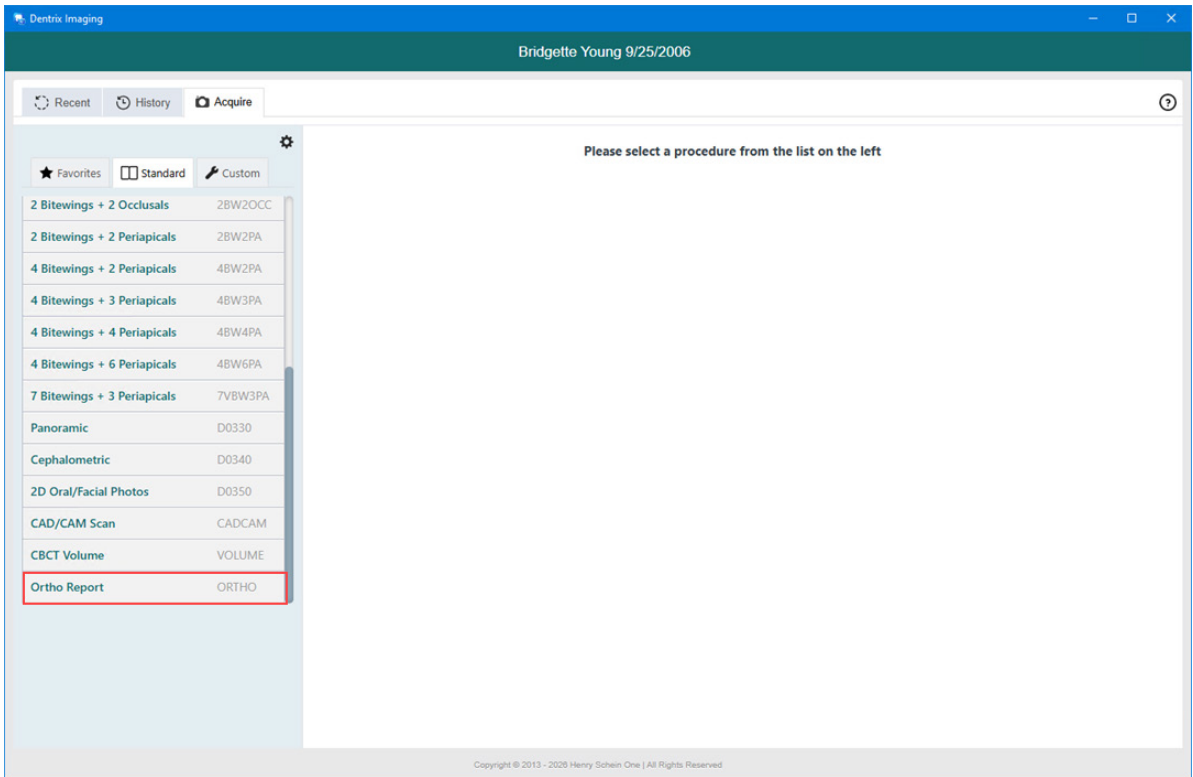
To open the Ortho Report

1. Open the Patient Chart and select a patient.
2. In the Imaging toolbar, click the Launch Dentrix Imaging icon.

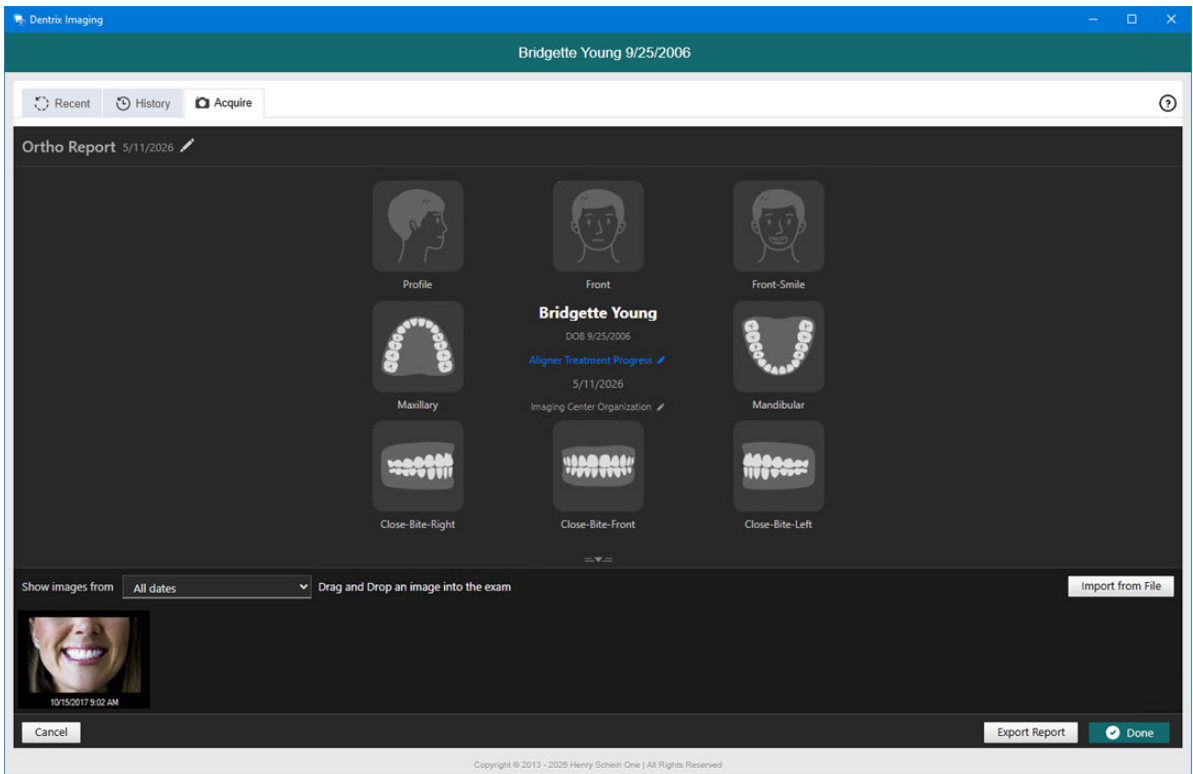
The Dentrix Imaging window appears.



3. Click the **Acquire** tab.
4. Click the **Standard** tab, and then click **Ortho Report**.



The Ortho Report view appears.

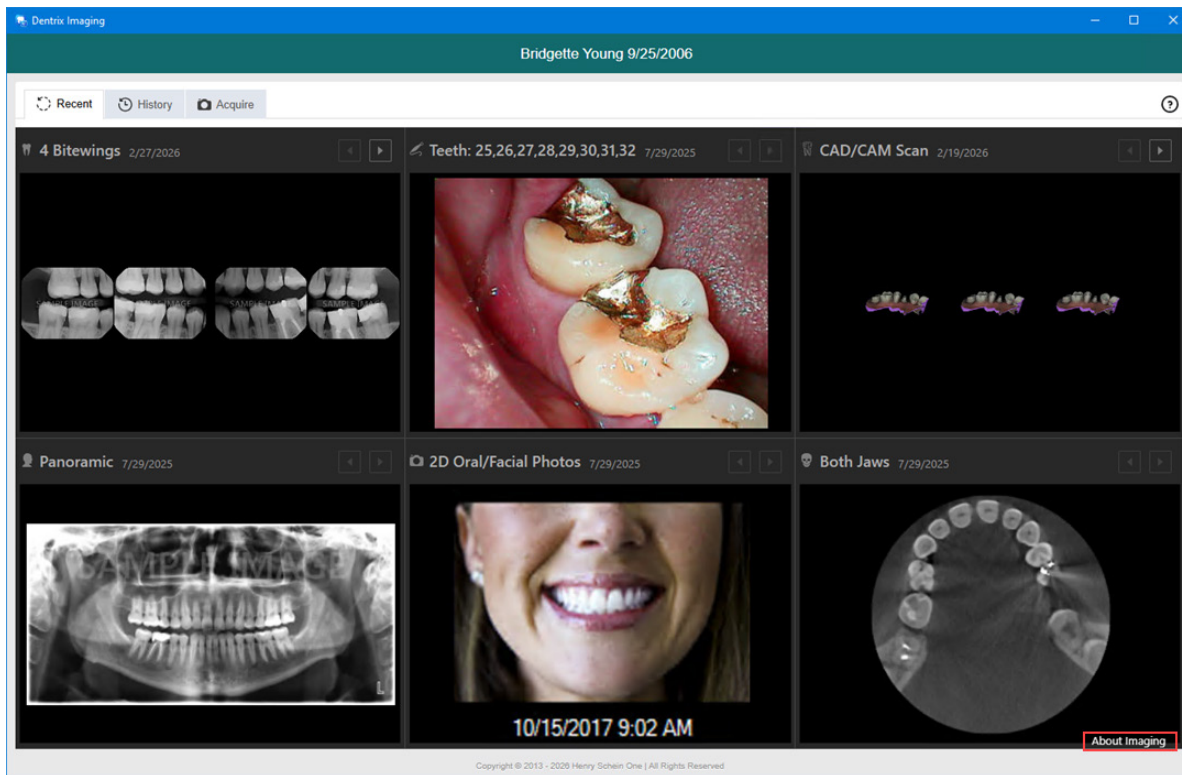


THE ABOUT IMAGING DIALOG BOX

The About Imaging dialog box was modified for the United Kingdom, Australia, and Canada markets.

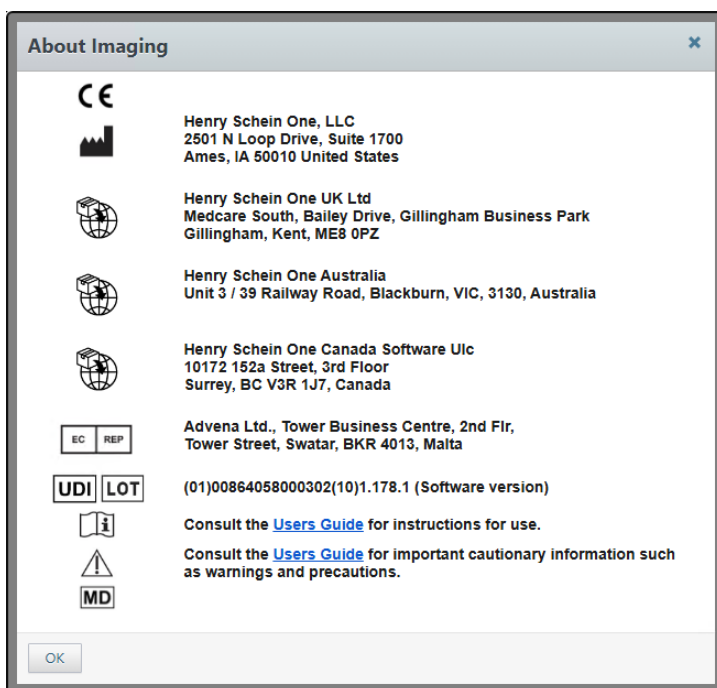
To view the About Imaging dialog box

1. In the Dentrix Imaging window, click the Recent tab.



2. Click About Imaging.

The About Imaging dialog box appears.



Dentrix 26.8

Overview and New Features

This Dentrix 26.8 Release Guide provides information about the Dentrix 26.8 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 26.8.

Note: For information about using the new features in Dentrix 26.8, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s new in Dentrix 26.8?” in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 26.8 includes the following enhancements:

THE REDESIGNED FAMILY FILE

The redesigned Family File is now available for all Beta offices to view and try out. We invite your feedback. For more information, please refer to [Previewing the new Family File](#) in the Dentrix Help.

CLAIMS MANAGER

- The Claims Manager guided tour no longer prevents new claims data from being updated while the tour is active.
- The phrase, “**Try the New Claims Manager Get paid faster**” was added to the legacy Claims Manager window to encourage practices to try the redesigned Claims Manager.
- The phrase, “**Get paid faster—submit and track claims directly in Dentrix with eClaims**” and a Learn More link were added to the redesigned Claims Manager window.

MISCELLANEOUS

- You can now save credit or debit cards on file to use with Practice Pay.
- A **Note** column was added to the **Claim Status** card in the redesigned Insurance Claim and Preauthorization windows.
- If your practice is registered to use Dentrix Forms but no forms records exist for the practice or the selected patient has no forms records, the Forms window is blank.

Using the New Features and Enhancements

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

Opening the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. The cards in the redesigned Family File have now been rearranged to mirror the layout of the legacy Family File window.

Note: 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 open the redesigned Family File

1. From your desktop, double-click the Family File icon, and then from the **Select Patient** dialog box, select the desired patient.

The redesigned Family File appears.

Young, Bridgette A Patient FORM STATUS HEALTH HISTORY ?

Patient Information				
Address	Consent	Missed Appointments	Chart #	Social Security #
185 N 640 E, Cisco, UT, 84515	08/07/2024	-	Y00001	-
Mobile Phone #	Home Phone #	First Visit	Last Visit	DL #
-	(801)555-3043	08/07/2024	01/27/2026	-
Status	Email	Provider	Fee Schedule	
Patient, F, Child	-	DDS1	<Prov Default>	

Health History	Employer	Continuing Care
<input type="checkbox"/> No health history on file	No employer information on file	01/28/2027 BITEWINGS
05/13/2026 PROPHY		

Primary Dental Insurance				Notes
Company	Group Plan	Group #	Fee Schedule	No patient notes yet
American Western Life	Central City Clinic	41336	-	
Coverage	Used	Ded. S/P/O	Met	
2500.00	122.00	50/0/0	0/0/0	
Other Maximums	-			

Payment & Billing Information				Referred By
Payment Amount	Amount Past Due	Billing Type	Last Payment	No incoming referrals
N/A	N/A	4 ●	N/A	
0 --> 30	31 --> 60	61 --> 90	91 -->	No outgoing referrals
-14869.00	0.00	0.00	Balance -14869.00	

Status	Name	Position	Gender	Patient	Birthdate
HoH Guar Ins	Young, Randall	Married	Male	Yes	08/18/1972
Ins	Young, Tina	Married	Female	Yes	06/14/1976
-	Young, Bridgette	Child	Female	Yes	09/25/2006

Claims Manager

The Claims Manager provides you with an interactive way to review, track, and manage insurance claims directly in Dentrix. The Claims Manager allows you to work with an interactive aging report and view the

status of printed and electronic claims. Recently, the Claims Manager was redesigned to allow you to submit and track claims directly in Dentrix with eClaims.

To open the Claims Manager

1. To open the Claims Manager, in the Office Manager or the Ledger, click **File**, and then click **Claims Manager**.

The legacy Dentrix Claims Manager window appears.

2. To open the redesigned Claims Manager, click the **New Claims Manager** toggle.

The redesigned Claims Manager appears.

- To learn more, click [Learn More](#) or [Unlock Full Access](#).

The Dentrix Claims webpage opens in your default browser.

DENTRIX For fast services call: 833-486-8228

Cleaner claims start here

Getting paid shouldn't depend on chasing errors, tracking down attachments, or fixing preventable issues after a claim is sent.

Dentrix Claims Processing helps practices submit more complete, accurate claims, so payments move forward with fewer interruptions.

You'll be able to:

- Catch claim issues earlier with smarter, built-in workflow checks
- Reduce rework with clearer, more actionable visibility into claim status and next steps
- Keep supporting images connected to the claim with Dentrix Imaging

Together, Claims Processing and Imaging help simplify submissions and support a more efficient revenue cycle.

FIRST NAME * **LAST NAME ***

EMAIL ADDRESS * **PRACTICE PHONE ***

PRACTICE NAME * **PRACTICE ZIP ***

NUMBER OF LOCATIONS * How can we help you?

Select...

I consent to be contacted by Henry Schein One, LLC and its affiliates regarding this request and to receive marketing messages by automated means, text and/or prerecorded messages at the number provided. Consent is not required as a condition of service.

By submitting this form, I agree to the [Terms of Use](#) and [Privacy Policy](#).

[Show Me How It Works](#)

- To learn more, complete the following:
 - Type your contact information in the form.
 - Select the consent to be contacted by Henry Schein One, LLC checkbox.
 - Click **Show Me How It Works**.

A representative from Henry Schein One will contact you.

Practice Pay

If you have enabled Dentrix Pay, you can use Practice Pay to accept a patient's credit or debit card payment without using a payment device, or when you cannot connect to a payment device. You can now save credit or debit cards on file to use with Practice Pay.

To save a credit or debit card on file to use with Practice Pay

- In the Ledger toolbar, click the Saved Credit Cards icon.

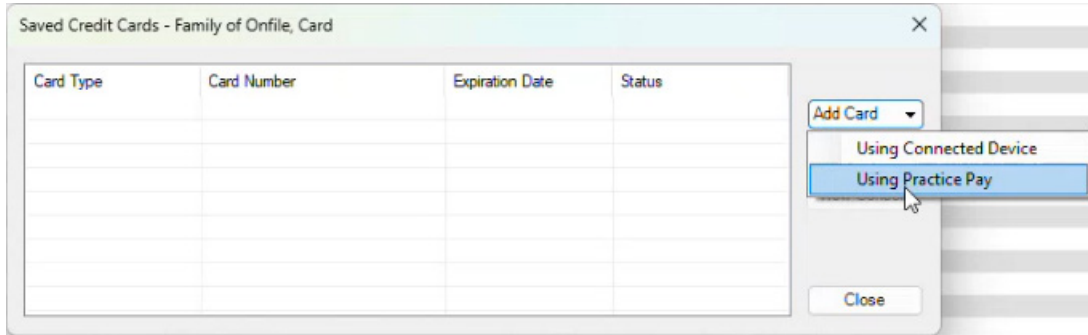
The **Saved Credit Cards** dialog box appears.

Saved Credit Cards - Family of Onfile, Card

Card Type	Card Number	Expiration Date	Status

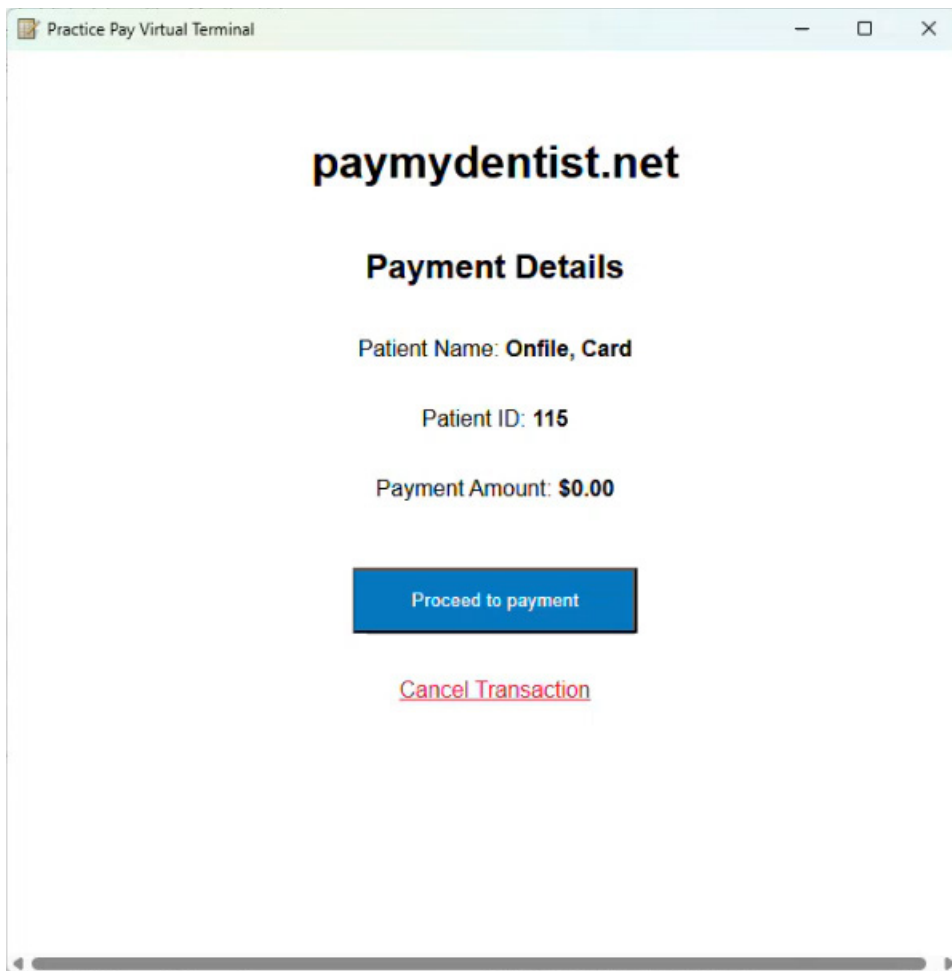
[Add Card](#) [View Consent](#)

- Click **Add Card**, and then from the menu, click **Using Practice Pay**.



The Credit Card on File Consent dialog box appears.

- In the **Patient/Representative signature** text box, have the patient sign the form, and then click **OK**. The Practice Pay Virtual Terminal dialog box appears.



Note: To save the card, you must make what is referred to as a \$0.00 dollar off payment.

4. Click Proceed to payment.
The Practice Pay Virtual Terminal dialog box changes to include card information.

Practice Pay Virtual Terminal

paymydentist.net

Payment Details

Patient Name: **Onfile, Card**

Patient ID: **115**

Payment Amount: **\$0.00**

Card Information * Denotes a required field

* Card Number:

* Expiration:

* CVV

Transaction Information

Amount: **\$0.00**

[Make Payment](#) [Cancel Transaction](#)

5. Type the card number, select the expiration date, type the CVV number, and then click **Make Payment**.
6. Close the Practice Pay Virtual Terminal dialog box, and then click **Yes** if the payment was successful. The **Saved Credit Cards** dialog box reappears listing the credit/debit card you just saved.

Saved Credit Cards - Family of Onfile, Card

Card Type	Card Number	Expiration Date	Status
Visa	*****0076	05/2030	Active

[Add Card](#) [Remove](#) [View Consent](#) [Close](#)

Note: The card you saved becomes the default payment method in the **Enter Payment** dialog box for the selected patient.

Redesigned Insurance Claim Window

A Note column was added to the Claim Status card in the redesigned Insurance Claim and Preauthorization windows.

To open the redesigned Insurance Claim window

1. In the Ledger, double-click the desired insurance claim.
If you have not previously opened the redesigned Insurance Claim window, the legacy Insurance Claim window appears.

Primary Dental Insurance Claim (01/27/2026) Received

File View Secondary Create Medical Enter Payment Remarks Submit Benefits/Cov Help

Try the New Claim Window
Get paid faster! Try the New Claim Window

Patient: Young, Bridgette A **Carrier:** American Western Life
Subscriber: Young, Randall **Group Plan:** Central City Clinic
Employer: Central City Clinic (Release of Info/Assign of Benefits) (Secondary Insurance)
eClaims Ready: (eClaims is not set up)

Billing Provider: Smith, Dennis **Claim Information:** Non-Standard
Rendering Provider: Smith, Dennis **Diagnostic Codes:**
Pay-To Provider: Smith, Dennis

Tooth Surface	Description	Date	Code	Fee	Ins Paid
	Intraoral Occlusal Image	01/27/2026	D0240	40.00	40.00
	Intraoral Occlusal Image	01/27/2026	D0240	40.00	40.00
	Bitewing Two Image	01/27/2026	D0272	42.00	42.00

Total Billed:	122.00	Pmt Date	Pmt Amt	Description	Prov
Est Ins Portion:	122.00	02/02/2026	122.00	Ck# 12345	DD51
Itemized Total:	122.00				
Total Paid:	122.00				
Total Credit Adj:	0.00				
Total Chrg Adj:	0.00				
Ded S/P/O:	0/0/0				

Adj Date **Adj Amt** **Type** **Prov**

Create: 01/27/2026 **Sent:** 02/02/2026 **Insurance Plan Note**
Partial Payment: This is a test note.

Claim Status [Add/Edit Status](#)

Date	Status	Remarks for Unusual Services
02/02/2026	Received	
01/27/2026	Created	

(No Note)

2. Click the Try the New Claim Window toggle.
The redesigned Insurance Claim window appears.

Young, Bridgette A - Primary Dental Insurance Claim (1/27/2026) Received
New Claim Window
LEAVE FEEDBACK

Young, Bridgette A
Primary Secondary
PLAN DETAILS ENTER PAYMENT
SUBMIT

Primary Insurance

Subscriber	Employer	Carrier	Group Plan	Payor ID	
Young, Randall	Central City Clinic	American Western Life	Central City Clinic		<input checked="" type="checkbox"/> Release of Info <input checked="" type="checkbox"/> Assignment of Benefits

Billing Provider	Rendering Provider	Pay-To-Provider	Claim Information
Smith, Dennis	Smith, Dennis	Smith, Dennis	Non-Standard

Procedures

Tooth	Surface	Description	Procedure Date	Code	Fee	Ins. Paid
		Intraoral Occlusal Image	01/27/2026	D0240	\$40.00	\$40.00
		Intraoral Occlusal Image	01/27/2026	D0240	\$40.00	\$40.00
		Bitewing Two Image	01/27/2026	D0272	\$42.00	\$42.00

Attachments	Diagnostic Codes				
<table style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 30%;">Type</th> <th>Description</th> </tr> <tr> <td>Radiology Films</td> <td>Imaging Attachment</td> </tr> </table>	Type	Description	Radiology Films	Imaging Attachment	When a diagnostic code is added, it will appear here.
Type	Description				
Radiology Films	Imaging Attachment				

Payments	Claim Financial Summary																						
<table style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 15%;">Date</th> <th style="width: 30%;">Description</th> <th style="width: 15%;">Provider</th> <th style="width: 40%;">Amount</th> </tr> <tr> <td>02/02/2026</td> <td>Ck# 12345</td> <td>DDS1</td> <td>\$122.00</td> </tr> </table>	Date	Description	Provider	Amount	02/02/2026	Ck# 12345	DDS1	\$122.00	<table style="width: 100%; border-collapse: collapse;"> <tr> <td>Total Billed</td> <td style="text-align: right;">\$122.00</td> </tr> <tr> <td>Est. Ins. Portion</td> <td style="text-align: right;">\$122.00</td> </tr> <tr> <td>Itemized Total</td> <td style="text-align: right;">\$122.00</td> </tr> <tr> <td>Total Paid</td> <td style="text-align: right;">\$122.00</td> </tr> <tr> <td>Total Credit Adj.</td> <td style="text-align: right;">\$0.00</td> </tr> <tr> <td>Total Charge Adj.</td> <td style="text-align: right;">\$0.00</td> </tr> <tr> <td>Ded S/P/O:</td> <td style="text-align: right;">0/0/0</td> </tr> </table>	Total Billed	\$122.00	Est. Ins. Portion	\$122.00	Itemized Total	\$122.00	Total Paid	\$122.00	Total Credit Adj.	\$0.00	Total Charge Adj.	\$0.00	Ded S/P/O:	0/0/0
Date	Description	Provider	Amount																				
02/02/2026	Ck# 12345	DDS1	\$122.00																				
Total Billed	\$122.00																						
Est. Ins. Portion	\$122.00																						
Itemized Total	\$122.00																						
Total Paid	\$122.00																						
Total Credit Adj.	\$0.00																						
Total Charge Adj.	\$0.00																						
Ded S/P/O:	0/0/0																						

Adjustments	Insurance Plan Note
When an adjustment is made, it will appear here.	This is a test note.

Claim Status	Remarks For Unusual Services															
<table style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 20%;">Created</th> <th style="width: 30%;">Sent</th> <th style="width: 50%;">Partial Payment</th> </tr> <tr> <td>01/27/2026</td> <td>02/02/2026</td> <td></td> </tr> <tr> <th>Date</th> <th>Claim Status</th> <th>Note</th> </tr> <tr> <td>02/02/2026</td> <td>Received</td> <td></td> </tr> <tr> <td>01/27/2026</td> <td>Created</td> <td></td> </tr> </table>	Created	Sent	Partial Payment	01/27/2026	02/02/2026		Date	Claim Status	Note	02/02/2026	Received		01/27/2026	Created		Click to add a remark.
Created	Sent	Partial Payment														
01/27/2026	02/02/2026															
Date	Claim Status	Note														
02/02/2026	Received															
01/27/2026	Created															

- To enter a Claim Status note, double-click the Claim Status card.
The Claim Status dialog box appears

Claim Status

Claim Status **Claim Sent**
2/2/2026

Update the claim's status, and view or add notes to status history.

Update Claim Status

Status: Provider / Staff Member:

Note:

ADD

Claim Status History Claim is Partially Paid

Status	Source	Date	Time	Actions
Received	System	2/2/2026	12:20 PM	
Created	System	1/27/2026	12:27 PM	

CANCEL **SAVE & CLOSE**

- To add a note, type the note in the **Note** text box, and then click **Save & Close**.

Dentrix 26.7

Overview and New Features

This Dentrix 26.7 Release Guide provides information about the Dentrix 26.7 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 26.7.

Note: For information about using the new features in Dentrix 26.7, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s new in Dentrix 26.7?” in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 26.7 includes the following enhancements:

THE REDESIGNED FAMILY FILE

The redesigned Family File is now available for all Beta offices to view and try out. We invite your feedback. For more information, please refer to [Previewing the new Family File](#) in the Dentrix Help.

LEDGER

The redesigned Ledger is available to a limited number of Beta offices to view and try out. We invite your feedback. For more information, please refer to [Previewing the new Ledger](#) in the Dentrix Help.




DENTAL SAVINGS PLANS FROM DENTALPLANS

- A QR code is now automatically included on treatment case printouts for uninsured patients:
 - No extra setup is required if you are using Dentrix 26.6 and later.
 - When patients scan the QR code, they are taken directly to the dental savings plans on the DentalPlans website that your office already accepts.
 - Each QR code is unique to your practice.
- Benefits to your practice include:
 - Increased treatment acceptance for uninsured patients from 40 to 80%
 - Simplified referral process with an automated solution
 - Improved patient outcomes by reducing financial barriers to care
 - Increased revenue by converting uninsured patients at the point of care, without adding operational burdens to your practice

DENTRIX IMAGING

- If you use Carestream devices to acquire images, they now appear first in the device list.
- If you use 3Shape, you can now use 3Shape Unite mDNS to discover your devices automatically.
- The filename extension for exported images was changed from JPEG to JPG.

MISCELLANEOUS

- In the Patient Chart, tooltips were added to the Referred By  and Referred To  icons in the Progress Notes panel.
- The Practice Notifications icon/button  was added to the Appointment Book, the Office Manager, and the Ledger.

- If you have enabled passwords, the logged-in provider or staff member is now automatically selected in the **Claim Status Notes** dialog box.
- In Dentrix Forms, you can now revert updated patient information to its previously blank state. This feature is useful when patients enter information that is incorrect, sensitive, inappropriate, or unrelated.

Using the New Features and Enhancements

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

Opening the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. The cards in the redesigned Family File have now been rearranged to mirror the layout of the legacy Family File window.

Note: 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 open the redesigned Family File

1. From your desktop, double-click the Family File icon, and then from the **Select Patient** dialog box, select the desired patient.

The redesigned Family File appears.

Dentrix Family File - Young, Randall [YO0002] New Family File LEAVE FEEDBACK

File Edit Help

What's New

Young, Bridgette A Patient FORM STATUS HEALTH HISTORY ?

Patient Information					
Address	Consent	Missed Appointments	Chart #	Social Security #	
185 N 640 E, Cisco, UT, 84515	08/07/2024	-	YO0001	-	
Mobile Phone #	Home Phone #	First Visit	Last Visit	DL #	Birthdate
-	(801)555-3043	08/07/2024	01/27/2026	-	09/25/2006, 19
Status	Email	Provider	Fee Schedule		
Patient, F, Child	-	DDS1	<Prov Default>		

Health History	Employer	Continuing Care
<input type="checkbox"/> No health history on file	No employer information on file	01/28/2027 BITEWINGS
05/13/2026 PROPHY		

Primary Dental Insurance				Notes
Company	Group Plan	Group #	Fee Schedule	No patient notes yet
American Western Life	Central City Clinic	41336	-	
Coverage	Used	Ded. S/P/O	Met	
2500.00	122.00	50/0/0	0/0/0	
Other Maximums				
-				

Payment & Billing Information				Referred By
Payment Amount	Amount Past Due	Billing Type	Last Payment	No incoming referrals
N/A	N/A	4 ●	N/A	
0 --> 30	31 --> 60	61 --> 90	91 -->	No outgoing referrals
-14869.00	0.00	0.00	Balance -14869.00	

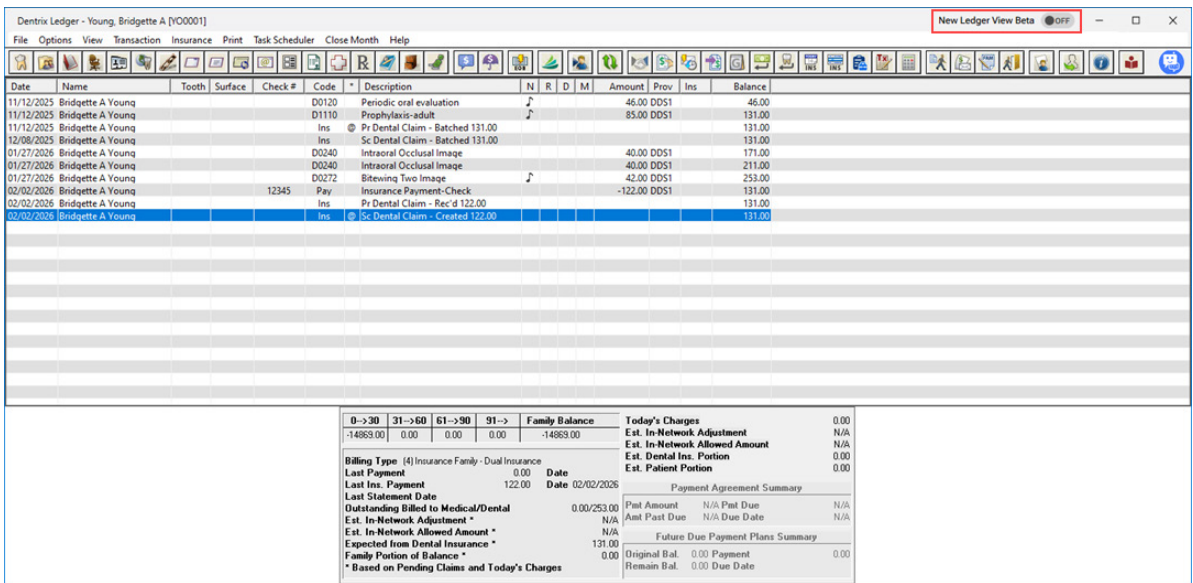
Status	Name	Position	Gender	Patient	Birthdate
HoH Guar Ins	Young, Randall	Married	Male	Yes	08/18/1972
Ins	Young, Tina	Married	Female	Yes	06/14/1976
-	Young, Bridgette	Child	Female	Yes	09/25/2006

Previewing the Redesigned Ledger

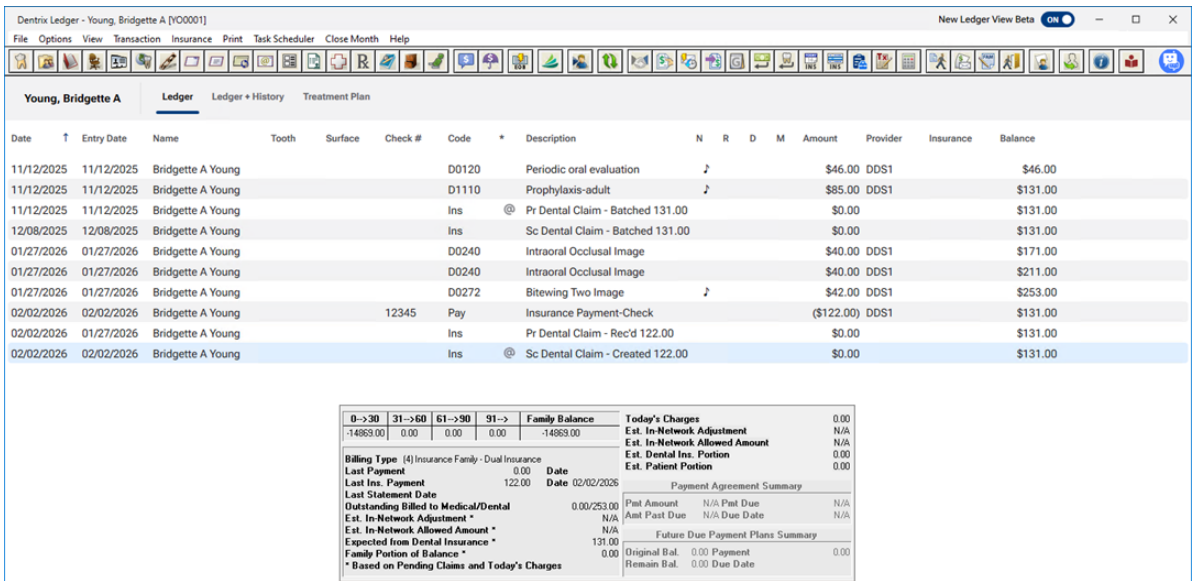
At Henry Schein One, we're redesigning the Ledger window to make it more intuitive and easier to use.

To preview the redesigned Ledger

1. Open the legacy Ledger, and select a patient.
The Ledger window appears.



- To preview the new Ledger, click the New Ledger View Beta toggle. The redesigned Ledger window appears.



- To view a claim, double-click it. If you have switched to the new claim window, the redesigned Insurance Claim window appears.

Young, Bridgette A - Primary Dental Insurance Claim (11/12/2025) Batched New Claim Window LEAVE FEEDBACK

Young, Bridgette A Primary Secondary [PLAN DETAILS](#) [ENTER PAYMENT](#) ?

Primary Insurance						<input checked="" type="checkbox"/> Release of Info <input checked="" type="checkbox"/> Assignment of Benefits	
Subscriber	Employer	Carrier	Group Plan	Payor ID			
Young, Randall	Central City Clinic	American Western Life	Central City Clinic				
Billing Provider	Rendering Provider	Pay-To-Provider	Claim Information				
Smith, Dennis	Smith, Dennis	Smith, Dennis	Non-Standard				
Procedures							
Tooth	Surface	Description	Procedure Date	Code	Fee	Ins. Paid	
		Periodic oral evaluation	11/12/2025	D0120	\$46.00	\$0.00	
		Prophylaxis-adult	11/12/2025	D1110	\$85.00	\$0.00	
Attachments				Diagnostic Codes			
Type	Description			When a diagnostic code is added, it will appear here.			
Radiology Films	Imaging Attachment						
Payments				Claim Financial Summary			
When a payment is made, it will appear here.				Total Billed	\$131.00		
				Est. Ins. Portion	\$131.00		
When an adjustment is made, it will appear here.				Itemized Total	\$0.00		
				Total Paid	\$0.00		
				Total Credit Adj.	\$0.00		
				Total Charge Adj.	\$0.00		
Ded S/P/O:				0/0/0			
Claim Status				Insurance Plan Note			
Created	Sent	Partial Payment		This is a test note.			
11/12/2025	11/12/2025						
Date	Claim Status			Remarks For Unusual Services			
01/16/2026	Sent						
11/12/2025	Batched						
11/12/2025	Created						
				Click to add a remark.			

4. To view all the transactions for the selected patient, click the **Ledger + History** tab.

Dentrix Ledger + History - Young, Bridgette A [Y00001] New Ledger View Beta

File Options View Transaction Insurance Print Task Scheduler Close Month Help

Young, Bridgette A Ledger Ledger + History Treatment Plan

Date	Entry Date	Name	Tooth	Surface	Check #	Code	Description	N	R	D	M	Amount	Provider	Insurance	Balance
11/12/2025	11/12/2025	Bridgette A Young				D0120	Periodic oral evaluation					\$46.00	DDS1		\$46.00
11/12/2025	11/12/2025	Bridgette A Young				D1110	Prophylaxis-adult					\$85.00	DDS1		\$131.00
11/12/2025	11/12/2025	Bridgette A Young				Ins	Pr Dental Claim - Batched 131.00					\$0.00			\$131.00
12/08/2025	12/08/2025	Bridgette A Young				Ins	Sc Dental Claim - Batched 131.00					\$0.00			\$131.00
01/27/2026	01/27/2026	Bridgette A Young				D0240	Intraoral Occlusal Image					\$40.00	DDS1		\$171.00
01/27/2026	01/27/2026	Bridgette A Young				D0240	Intraoral Occlusal Image					\$40.00	DDS1		\$211.00
01/27/2026	01/27/2026	Bridgette A Young				D0272	Biteewing Two Image					\$42.00	DDS1		\$253.00
02/02/2026	02/02/2026	Bridgette A Young			12345	Pay	Insurance Payment-Check					(\$122.00)	DDS1		\$131.00
02/02/2026	01/27/2026	Bridgette A Young				Ins	Pr Dental Claim - Rec'd 122.00					\$0.00			\$131.00
02/02/2026	02/02/2026	Bridgette A Young				Ins	Sc Dental Claim - Created 122.00					\$0.00			\$131.00

0->30	31->60	61->90	91->	Family Balance	Today's Charges	0.00
-14863.00	0.00	0.00	0.00	-14863.00	Est. In-Network Adjustment	N/A
					Est. In-Network Allowed Amount	N/A
					Est. Dental Ins. Portion	0.00
					Est. Patient Portion	0.00
Billing Type (4) Insurance Family- Dual Insurance						
Last Payment		0.00	Date	02/02/2026	Payment Agreement Summary	
Last Ins. Payment		122.00	Date	02/02/2026	Pat Amount	N/A Pat Due
Last Statement Date					Asst Past Due	N/A Due Date
Outstanding Billed to Medical/Dental		0.00/253.00			Future Due Payment Plans Summary	N/A
Est. In-Network Adjustment *		N/A				N/A
Est. In-Network Allowed Amount *		N/A				
Expected from Dental Insurance *		131.00				
Family Portion of Balance *		0.00			Original Bal.	0.00 Payment
* Based on Pending Claims and Today's Charges					Remain Bal.	0.00 Due Date

5. To view the selected patient's treatment plans, click the **Treatment Plan** tab.

Date	Entry Date	Name	Tooth	Surface	Check #	Code *	Description	N	R	D	M	Amount	Provider	Insurance	Balance
12/01/2025	12/01/2025	Bridgette A Young				D0120	Periodic oral evaluation					\$46.00	DDS1		\$46.00
12/01/2025	12/01/2025	Bridgette A Young				D0274	Bitewing Four Image					\$59.00	DDS1		\$105.00
12/01/2025	12/01/2025	Bridgette A Young				D1110	Prophylaxis-adult					\$85.00	DDS1		\$190.00
12/08/2025	12/08/2025	Bridgette A Young				Ins	Pr Dental PreAuth- Batched 190.00					\$0.00			\$190.00
12/08/2025	12/08/2025	Bridgette A Young				Ins	Sc Dental PreAuth- Created 190.00					\$0.00			\$190.00
12/16/2025	12/16/2025	Bridgette A Young	30			D2792	Crown-full cast noble metal					\$950.00	DDS1		\$1,140.00
12/16/2025	12/16/2025	Bridgette A Young	30			D3330	Endo therapy - molar (ex rest)					\$930.00	DDS1		\$2,070.00
12/16/2025	12/16/2025	Bridgette A Young				Ins	Pr Dental PreAuth- Created 1880.00					\$0.00			\$2,070.00

0->30	31->60	61->90	91->	Family Balance	Treatment Plan Total
-14893.00	0.00	0.00	0.00	-14893.00	2070.00

Billing Type: (4) Insurance Family - Dual Insurance		Date		Payment Agreement Summary	
Last Payment	0.00			Pat Amount	N/A Pat Due
Last Ins. Payment	122.00		02/02/2025	Amt Past Due	N/A Due Date
Last Statement Date				Future Due Payment Plans Summary	
Outstanding Billed to Medical/Dental	0.00/253.00			Original Bal.	0.00 Payment
Est. In-Network Adjustment *	N/A			Remain Bal.	0.00 Due Date
Est. In-Network Allowed Amount *	N/A				
Expected from Dental Insurance *	131.00				
Family Portion of Balance *	0.00				
* Based on Pending Claims and Today's Charges					

Dental Savings Plans from DentalPlans

You can enroll your uninsured or under insured patients in a dental savings plan from DentalPlans. Through the :DentalPlans.com portal, you can:

- Purchase Plans – Increase treatment plan acceptance rates.
- Verify Eligibility – Verify your patients' plan membership eligibility.
- Learn More – Learn more about how to reach new patients and reactivate dormant ones and how dental savings plans benefit you and your patients.
- Order Free Brochures – Grow your practice with free patient marketing materials.

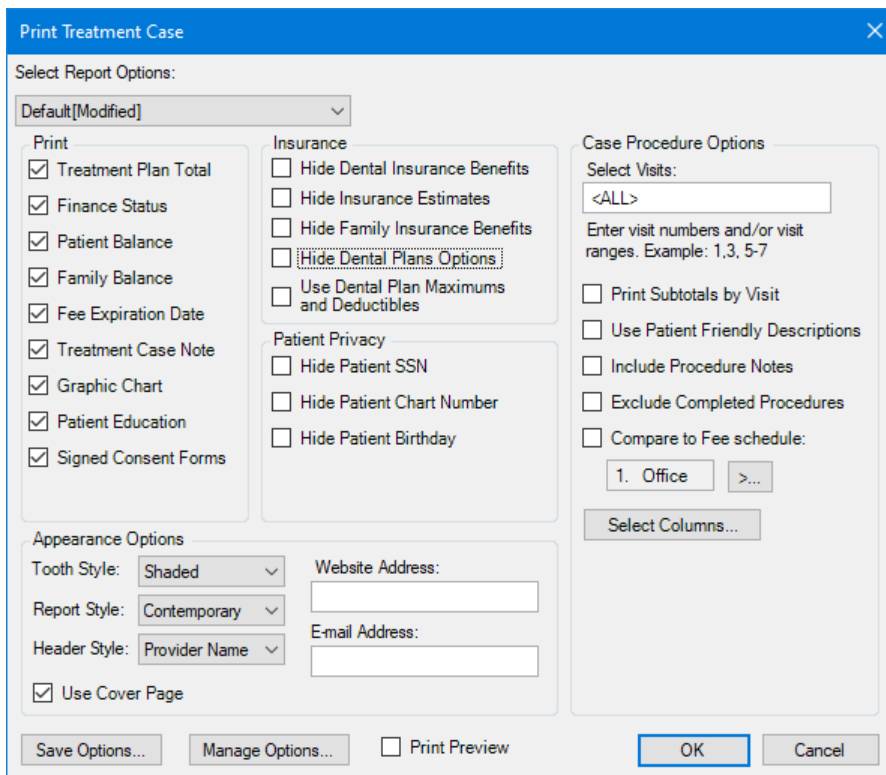
Benefits to your practice include:

- Increase treatment acceptance for uninsured patients from 40 to 80%
- Simplify your referral process with an automated solution
- Improve patient outcomes by reducing financial barriers to care
- Increase revenue by converting uninsured patients at the point of care, without adding operational burdens to your practice

You can now enroll your uninsured or under insured patients in a dental savings plan using a QR code specific to your practice that is automatically included on treatment case printouts for uninsured patients.

To enroll a patient in a dental savings plan using a QR code

1. In the Treatment Planner, click the **File** menu, point to **Print**, and then click **Print Treatment Case**. The **Print Treatment Case** dialog box appears.



Print Treatment Case

Select Report Options:

Default[Modified]

Print

- Treatment Plan Total
- Finance Status
- Patient Balance
- Family Balance
- Fee Expiration Date
- Treatment Case Note
- Graphic Chart
- Patient Education
- Signed Consent Forms

Insurance

- Hide Dental Insurance Benefits
- Hide Insurance Estimates
- Hide Family Insurance Benefits
- Hide Dental Plans Options
- Use Dental Plan Maximums and Deductibles

Patient Privacy

- Hide Patient SSN
- Hide Patient Chart Number
- Hide Patient Birthday

Case Procedure Options

Select Visits:

<ALL>

Enter visit numbers and/or visit ranges. Example: 1,3, 5-7

- Print Subtotals by Visit
- Use Patient Friendly Descriptions
- Include Procedure Notes
- Exclude Completed Procedures
- Compare to Fee schedule:

1. Office >...

Select Columns...

Appearance Options

Tooth Style: Shaded

Report Style: Contemporary

Header Style: Provider Name

- Use Cover Page

Website Address:

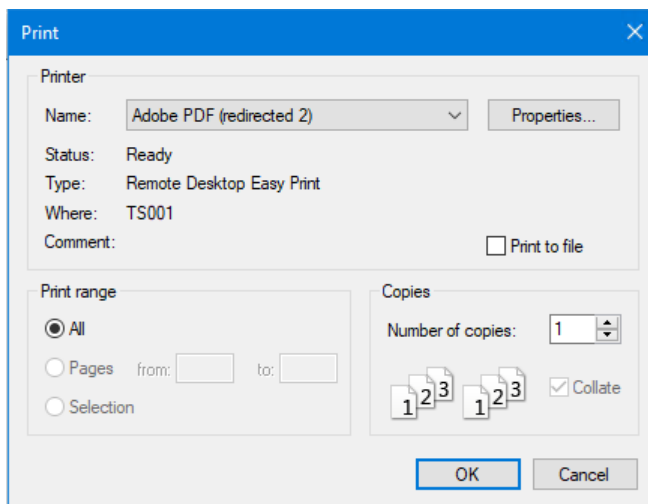
E-mail Address:

Save Options... Manage Options... Print Preview **OK** Cancel

Important: To prevent the DentalPlans QR code from printing, select **Hide Dental Plans Options**, and then click **OK**. You can also do this from the Office Manager.

- Click **OK**.

The **Print** dialog box appears.



Print

Printer

Name: Adobe PDF (redirected 2) Properties...

Status: Ready

Type: Remote Desktop Easy Print

Where: TS001

Comment: Print to file

Print range

- All
- Pages from: to:
- Selection

Copies

Number of copies: 1

Collate

OK Cancel

- From the **Name** list, select the desired printer, and then click **OK**.

The treatment case prints with the QR code.

Dennis Smith, D.D.S.

Name: Bridgette A. Young
 Birthdate: 09/25/2006
 Social Security Number: [REDACTED]
 Chart Number: YO0001

TREATMENT CASE

Treatment Plan

DATE	VISIT	TOOTH	SURF	CODE	PROV	DESCRIPTION	FEE	PATIENT	PRIMARY	SECONDARY
12/01/2025	0			D0120	DDS1	Periodic oral evaluation	46.00	0.00	46.00	0.00
12/01/2025	0			D0274	DDS1	Bitewing Four Image	59.00	0.00	59.00	0.00
12/01/2025	0			D1110	DDS1	Prophylaxis-adult	85.00	0.00	85.00	0.00
12/16/2025	0	30		D2792	DDS1	Crown-full cast noble metal	950.00	0.00	475.00	475.00
12/16/2025	0	30		D3330	DDS1	Endo therapy - molar (ex rest)	930.00	0.00	744.00	186.00

:: INSURANCE PROVIDER(S) ::

Primary	Secondary
American Western Life	MetLife

:: TOTALS ::

Fee	Patient	Primary	Secondary
2070.00	0.00	1409.00	661.00

:: FINANCIAL SUMMARY ::

Treatment Plan Total	2070.00
Estimated Deductible to be Applied	0.00
Estimated Insurance Payment	2070.00
Estimated Patient's Portion	0.00
Finance Status	
Patient Balance	131.00
Family Balance	-14869.00
Fee Expiration Date	08/25/2025

No Dental Insurance?

We accept dental savings plans, reducing your out-of-pocket costs on the spot. Call 844-371-2959 to join a plan and start saving.

Visit DentalPlans.com/PA/PA48711

SCAN ME

Alternate Cases:

Case notes:

DDS1 - 1220 South 630 East Suite #500
 American Fork, UT 84003 PHONE: (801)555-4121

- Have your patient scan the QR code and select the plan that best meets his or her needs (one of your office's preferred plans).

Notes:

- Patients can join individual or family plans.
- You can print a plan brochure for patients to learn more and join later.
- You can send a plan brochure through an email message.
- You select up to 5 plans as your practice's preferred plans.

Plan Accepted By Dr. Frank Butler at 5520 Old National Hwy Ste 100, ATLANTA, GA 30349

 Aetna Vital Savings?	Individual Plan \$169.95 Price Per Year	Select	Family Plan \$214.95 Price Per Year	Select	Plan Information
 iDental Discount Plan	Individual Plan \$154.95 Price Per Year	Select	Family Plan \$209.95 Price Per Year	Select	Plan Information
 Aetna Dental Access	Individual Plan \$154.95 Price Per Year	Select	Family Plan \$209.95 Price Per Year	Select	Plan Information
 Aetna Vital Savings? Plus	Individual Plan \$184.95 Price Per Year	Select	Family Plan \$219.95 Price Per Year	Select	Plan Information
 Humana Dental Access	Individual Plan \$154.95 Price Per Year	Select	Family Plan \$209.95 Price Per Year	Select	Plan Information

Dentrix 26.6

Overview and New Features

This Dentrix 26.6 Release Guide provides information about the Dentrix 26.6 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 26.6.

Note: For information about using the new features in Dentrix 26.6, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s new in Dentrix 26.6?” in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 26.6 includes the following enhancements:

THE REDESIGNED FAMILY FILE

The redesigned Family File is now available for all Beta offices to view and try out. We invite your feedback. For more information, please refer to [Previewing the new Family File](#) in the Dentrix Help.

LEDGER

The redesigned Ledger is available to a limited number of Beta offices to view and try out. We invite your feedback. For more information, please refer to [Previewing the new Ledger](#) in the Dentrix Help.

DENTRIX IMAGING

- Image Verify provides you with immediate, visual feedback on the quality and completeness of the images you capture so you can quickly identify any images you may need to retake before patients leave.
- Image Verify image and sensor types:
 - During acquisition – Intraoral X-ray (excluding phosphor plate)
 - Image viewer – All intraoral X-ray (including phosphor plate and 2D panoramic)
 - Not supported – CAD/CAM, CBCT, and Ceph
- Image Verify uses AI to evaluate each acquired image and assigns a 1 to 5 star rating based on image clarity.
 - Ratings from 1 to 3 stars trigger a message in a banner reading, “Consider Review or Retake.”
 - Ratings from 4 to 5 stars indicate that the image quality is acceptable, and the Feedback Panel to the right of the image indicates, “No Issues Detected.”
 - Edge cases (no AI response, for example) receive no stars, and the banner reads, “No Quality Information Available.”
- The Feedback Panel opens by default appearing automatically 5 seconds after images are acquired.
- Tooth structure assessment (full or part of tooth) detects key anatomical including crown, root, and missing teeth.

SMART IMAGE

- A conversion message (Conversion in Progress) was added for on-demand conversions.
- Smart Image no longer sends teeth to Dentrix Imaging for procedure posting.

DENTRIX FORMS

- Before you can send your patients text messages via SMS, mobile carrier regulations now require you to register your practice.

MISCELLANEOUS

- When claims are resent from the Claims Manager, the resent date of the claim is updated to the system date at the time of the resend, and a resend status note is created.
- By default, the date filter in the Claims Manager for unsent and sent claims is now set to **Last 30 days**.
- If you are creating a voice note in the Signature Manager, the Signature Manager refreshes automatically when you close it.

Using the New Features and Enhancements

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

Opening the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. The cards in the redesigned Family File have now been rearranged to mirror the layout of the legacy Family File window.

Note: 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 open the redesigned Family File

1. From your desktop, double-click the Family File icon, and then from the **Select Patient** dialog box, select the desired patient.

The redesigned Family File appears.

Dentrix Family File - Young, Randall [YO0002] New Family File LEAVE FEEDBACK

File Edit Help

What's New

Young, Bridgette A Patient FORM STATUS HEALTH HISTORY ?

Patient Information				
Address	Consent	Missed Appointments	Chart #	Social Security #
185 N 640 E, Cisco, UT, 84515	08/07/2024	-	YO0001	-
Mobile Phone #	Home Phone #	First Visit	Last Visit	DL #
-	(801)555-3043	08/07/2024	01/27/2026	-
Status	Email	Provider	Fee Schedule	<Prov Default>
Patient, F, Child	-	DDS1		

Health History	Employer	Continuing Care
<input type="checkbox"/> No health history on file	No employer information on file	01/28/2027 BITEWINGS
05/13/2026 PROPHY		

Primary Dental Insurance				Notes
2 DENTAL, 1 MEDICAL				No patient notes yet
Company	Group Plan	Group #	Fee Schedule	
American Western Life	Central City Clinic	41336	-	
Coverage	Used	Ded. S/P/O	Met	
2500.00	122.00	50/0/0	0/0/0	
Other Maximums	-			

Payment & Billing Information				Referred By
Payment Amount	Amount Past Due	Billing Type	Last Payment	No incoming referrals
N/A	N/A	4 ●	N/A	
0 --> 30	31 --> 60	61 --> 90	91 -->	No outgoing referrals
-14869.00	0.00	0.00	Balance -14869.00	

Status	Name	Position	Gender	Patient	Birthdate
HoH Guar Ins	Young, Randall	Married	Male	Yes	08/18/1972
Ins	Young, Tina	Married	Female	Yes	06/14/1976
-	Young, Bridgette	Child	Female	Yes	09/25/2006

Previewing the Redesigned Ledger

At Henry Schein One, we're redesigning the Ledger window to make it more intuitive and easier to use.

To preview the redesigned Ledger

1. Open the legacy Ledger, and select a patient.
The Ledger window appears.

Date	Name	Tooth	Surface	Check #	Code	Description	N	R	D	M	Amount	Prov	Ins	Balance
11/12/2025	Bridgette A Young				D0120	Periodic oral evaluation					46.00	DDS1		46.00
11/12/2025	Bridgette A Young				D1110	Prophylaxis-adult					85.00	DDS1		131.00
11/12/2025	Bridgette A Young				Ins	Pr Dental Claim - Batched 131.00								131.00
12/08/2025	Bridgette A Young				Ins	Sc Dental Claim - Batched 131.00								131.00
01/27/2026	Bridgette A Young				D0240	Intraoral Occlusal Image					40.00	DDS1		171.00
01/27/2026	Bridgette A Young				D0240	Intraoral Occlusal Image					40.00	DDS1		211.00
01/27/2026	Bridgette A Young				D0272	Bitewing Two Image					42.00	DDS1		253.00
02/02/2026	Bridgette A Young			12345	Pay	Insurance Payment-Check					-122.00	DDS1		131.00
02/02/2026	Bridgette A Young				Ins	Pr Dental Claim - Rec'd 122.00								131.00
02/02/2026	Bridgette A Young				Ins	Sc Dental Claim - Created 122.00								131.00

0->30	31->60	61->90	91->	Family Balance	-14893.00	0.00	0.00	0.00	0.00	-14893.00	Today's Charges	0.00		
											Est. In-Network Adjustment	N/A		
											Est. In-Network Allowed Amount	N/A		
											Est. Dental Ins. Portion	0.00		
											Est. Patient Portion	0.00		
											Payment Agreement Summary			
											Past Amount	N/A	Past Due	N/A
											Amt Past Due	N/A	Due Date	N/A
											Future Due Payment Plans Summary			
											Original Bal.	0.00	Payment	0.00
											Remain Bal.	0.00	Due Date	

- To preview the new Ledger, click the New Ledger View Beta toggle. The redesigned Ledger window appears.

Date	Entry Date	Name	Tooth	Surface	Check #	Code	Description	N	R	D	M	Amount	Provider	Insurance	Balance
11/12/2025	11/12/2025	Bridgette A Young				D0120	Periodic oral evaluation					\$46.00	DDS1		\$46.00
11/12/2025	11/12/2025	Bridgette A Young				D1110	Prophylaxis-adult					\$85.00	DDS1		\$131.00
11/12/2025	11/12/2025	Bridgette A Young				Ins	Pr Dental Claim - Batched 131.00					\$0.00			\$131.00
12/08/2025	12/08/2025	Bridgette A Young				Ins	Sc Dental Claim - Batched 131.00					\$0.00			\$131.00
01/27/2026	01/27/2026	Bridgette A Young				D0240	Intraoral Occlusal Image					\$40.00	DDS1		\$171.00
01/27/2026	01/27/2026	Bridgette A Young				D0240	Intraoral Occlusal Image					\$40.00	DDS1		\$211.00
01/27/2026	01/27/2026	Bridgette A Young				D0272	Bitewing Two Image					\$42.00	DDS1		\$253.00
02/02/2026	02/02/2026	Bridgette A Young			12345	Pay	Insurance Payment-Check					(\$122.00)	DDS1		\$131.00
02/02/2026	01/27/2026	Bridgette A Young				Ins	Pr Dental Claim - Rec'd 122.00					\$0.00			\$131.00
02/02/2026	02/02/2026	Bridgette A Young				Ins	Sc Dental Claim - Created 122.00					\$0.00			\$131.00

0->30	31->60	61->90	91->	Family Balance	-14893.00	0.00	0.00	0.00	0.00	-14893.00	Today's Charges	0.00		
											Est. In-Network Adjustment	N/A		
											Est. In-Network Allowed Amount	N/A		
											Est. Dental Ins. Portion	0.00		
											Est. Patient Portion	0.00		
											Payment Agreement Summary			
											Past Amount	N/A	Past Due	N/A
											Amt Past Due	N/A	Due Date	N/A
											Future Due Payment Plans Summary			
											Original Bal.	0.00	Payment	0.00
											Remain Bal.	0.00	Due Date	

- To view a claim, double-click it. If you have switched to the new claim window, the redesigned Insurance Claim window appears.

Young, Bridgette A - Primary Dental Insurance Claim (11/12/2025) Batched New Claim Window LEAVE FEEDBACK

Young, Bridgette A Primary Secondary [PLAN DETAILS](#) [ENTER PAYMENT](#) [SUBMIT](#) ?

Primary Insurance

Subscriber	Employer	Carrier	Group Plan	Payor ID	<input checked="" type="checkbox"/> Release of Info
Young, Randall	Central City Clinic	American Western Life	Central City Clinic		<input checked="" type="checkbox"/> Assignment of Benefits

Billing Provider	Rendering Provider	Pay-To-Provider	Claim Information
Smith, Dennis	Smith, Dennis	Smith, Dennis	Non-Standard

Procedures

Tooth	Surface	Description	Procedure Date	Code	Fee	Ins. Paid
		Periodic oral evaluation	11/12/2025	D0120	\$46.00	\$0.00
		Prophylaxis-adult	11/12/2025	D1110	\$85.00	\$0.00

Attachments	Diagnostic Codes				
<table border="0"> <tr> <th>Type</th> <th>Description</th> </tr> <tr> <td>Radiology Films</td> <td>Imaging Attachment</td> </tr> </table>	Type	Description	Radiology Films	Imaging Attachment	When a diagnostic code is added, it will appear here.
Type	Description				
Radiology Films	Imaging Attachment				

Payments	Claim Financial Summary														
When a payment is made, it will appear here.	<table border="0"> <tr> <td>Total Billed</td> <td>\$131.00</td> </tr> <tr> <td>Est. Ins. Portion</td> <td>\$131.00</td> </tr> <tr> <td>Itemized Total</td> <td>\$0.00</td> </tr> <tr> <td>Total Paid</td> <td>\$0.00</td> </tr> <tr> <td>Total Credit Adj.</td> <td>\$0.00</td> </tr> <tr> <td>Total Charge Adj.</td> <td>\$0.00</td> </tr> <tr> <td>Ded S/P/O:</td> <td>0/0/0</td> </tr> </table>	Total Billed	\$131.00	Est. Ins. Portion	\$131.00	Itemized Total	\$0.00	Total Paid	\$0.00	Total Credit Adj.	\$0.00	Total Charge Adj.	\$0.00	Ded S/P/O:	0/0/0
Total Billed	\$131.00														
Est. Ins. Portion	\$131.00														
Itemized Total	\$0.00														
Total Paid	\$0.00														
Total Credit Adj.	\$0.00														
Total Charge Adj.	\$0.00														
Ded S/P/O:	0/0/0														

Adjustments	Insurance Plan Note
When an adjustment is made, it will appear here.	This is a test note.

Claim Status	Remarks For Unusual Services																		
<table border="0"> <tr> <td>Created</td> <td>Sent</td> <td>Partial Payment</td> </tr> <tr> <td>11/12/2025</td> <td>11/12/2025</td> <td></td> </tr> <tr> <td>Date</td> <td>Claim Status</td> <td></td> </tr> <tr> <td>01/16/2026</td> <td>Sent</td> <td></td> </tr> <tr> <td>11/12/2025</td> <td>Batched</td> <td></td> </tr> <tr> <td>11/12/2025</td> <td>Created</td> <td></td> </tr> </table>	Created	Sent	Partial Payment	11/12/2025	11/12/2025		Date	Claim Status		01/16/2026	Sent		11/12/2025	Batched		11/12/2025	Created		Click to add a remark.
Created	Sent	Partial Payment																	
11/12/2025	11/12/2025																		
Date	Claim Status																		
01/16/2026	Sent																		
11/12/2025	Batched																		
11/12/2025	Created																		

4. To view all the transactions for the selected patient, click the **Ledger + History** tab.

Dentrix Ledger + History - Young, Bridgette A [Y00001] New Ledger View Beta

File Options View Transaction Insurance Print Task Scheduler Close Month Help

Young, Bridgette A Ledger Ledger + History Treatment Plan

Date	Entry Date	Name	Tooth	Surface	Check #	Code	Description	N	R	D	M	Amount	Provider	Insurance	Balance
11/12/2025	11/12/2025	Bridgette A Young				D0120	Periodic oral evaluation					\$46.00	DDS1		\$46.00
11/12/2025	11/12/2025	Bridgette A Young				D1110	Prophylaxis-adult					\$85.00	DDS1		\$131.00
11/12/2025	11/12/2025	Bridgette A Young				Ins	Pr Dental Claim - Batched 131.00					\$0.00			\$131.00
12/08/2025	12/08/2025	Bridgette A Young				Ins	Sc Dental Claim - Batched 131.00					\$0.00			\$131.00
01/27/2026	01/27/2026	Bridgette A Young				D0240	Intraoral Occlusal Image					\$40.00	DDS1		\$171.00
01/27/2026	01/27/2026	Bridgette A Young				D0240	Intraoral Occlusal Image					\$40.00	DDS1		\$211.00
01/27/2026	01/27/2026	Bridgette A Young				D0272	Biteewing Two Image					\$42.00	DDS1		\$253.00
02/02/2026	02/02/2026	Bridgette A Young			12345	Pay	Insurance Payment-Check					(\$122.00)	DDS1		\$131.00
02/02/2026	01/27/2026	Bridgette A Young				Ins	Pr Dental Claim - Rec'd 122.00					\$0.00			\$131.00
02/02/2026	02/02/2026	Bridgette A Young				Ins	Sc Dental Claim - Created 122.00					\$0.00			\$131.00

0->30	31->60	61->90	91->	Family Balance	Today's Charges	0.00
-14863.00	0.00	0.00	0.00	-14863.00	Est. In-Network Adjustment	N/A
					Est. In-Network Allowed Amount	N/A
					Est. Dental Ins. Portion	0.00
					Est. Patient Portion	0.00
Billing Type (4) Insurance Family- Dual Insurance						
Last Ins. Payment		0.00	Date	02/02/2026	Payment Agreement Summary	
Last Statement Date		122.00				
Outstanding Billed to Medical/Dental		0.00/253.00	Pat Amount	N/A	Pat Due	N/A
Est. In-Network Adjustment *		N/A	Asst Past Due	N/A	Due Date	N/A
Est. In-Network Allowed Amount *		N/A	Future Due Payment Plans Summary			
Expected from Dental Insurance *		131.00	Original Bal.	0.00	Payment	0.00
Family Portion of Balance *		0.00	Remain Bal.	0.00	Due Date	
<small>* Based on Pending Claims and Today's Charges</small>						

5. To view the selected patient's treatment plans, click the **Treatment Plan** tab.

Date	Entry Date	Name	Tooth	Surface	Check #	Code *	Description	N	R	D	M	Amount	Provider	Insurance	Balance
12/01/2025	12/01/2025	Bridgette A Young				D0120	Periodic oral evaluation					\$46.00	DDS1		\$46.00
12/01/2025	12/01/2025	Bridgette A Young				D0274	Bitewing Four Image					\$59.00	DDS1		\$105.00
12/01/2025	12/01/2025	Bridgette A Young				D1110	Prophylaxis-adult					\$85.00	DDS1		\$190.00
12/08/2025	12/08/2025	Bridgette A Young				Ins	Pr Dental PreAuth- Batched 190.00					\$0.00			\$190.00
12/08/2025	12/08/2025	Bridgette A Young				Ins	Sc Dental PreAuth- Created 190.00					\$0.00			\$190.00
12/16/2025	12/16/2025	Bridgette A Young	30			D2792	Crown-full cast noble metal					\$950.00	DDS1		\$1,140.00
12/16/2025	12/16/2025	Bridgette A Young	30			D3330	Endo therapy - molar (ex rest)					\$930.00	DDS1		\$2,070.00
12/16/2025	12/16/2025	Bridgette A Young				Ins	Pr Dental PreAuth- Created 1880.00					\$0.00			\$2,070.00

0->30	31->60	61->90	91->	Family Balance	Treatment Plan Total
-14863.00	0.00	0.00	0.00	-14863.00	2070.00

Billing Type (4) Insurance Family - Dual Insurance			
Last Payment	0.00	Date	
Last Ins. Payment	122.00	Date	02/02/2025
Last Statement Date			
Outstanding Billed to Medical/Dental	0.00/253.00	Past Amount	N/A
Est. In-Network Adjustment *	N/A	Am Past Due	N/A
Est. In-Network Allowed Amount *	N/A	Am Past Due	N/A
Expected from Dental Insurance *	131.00	Future Due Payment Plans Summary	
Family Portion of Balance *	0.00	Original Bal.	0.00
* Based on Pending Claims and Today's Charges		Remain Bal.	0.00

Dentrix Imaging

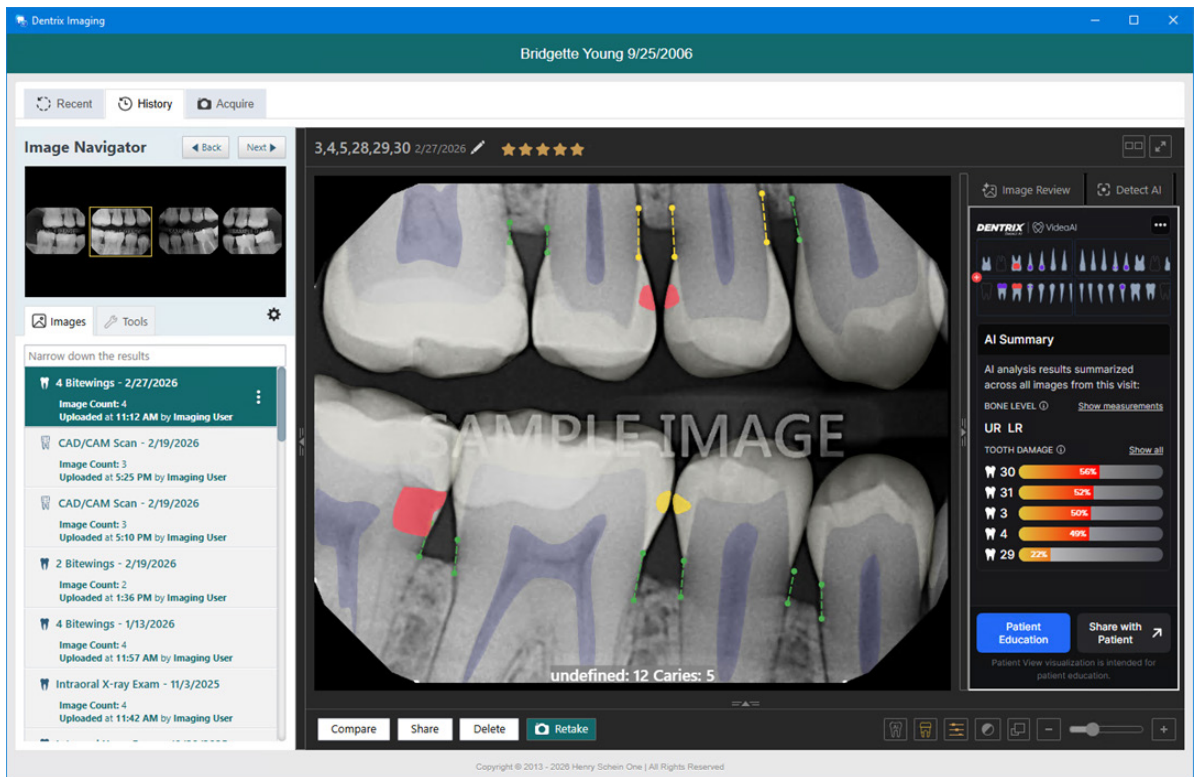
Image Verify provides you with immediate, visual feedback on the quality and completeness of the images you capture so you can quickly identify any images you may need to retake before patients leave.

Image Verify uses AI to evaluate each acquired image and assigns a 1 to 5 star rating based on image quality.

To acquire an image

1. Open the Patient Chart and select a patient.
2. In the Imaging toolbar, click the Launch Dentrix Imaging icon.
The Dentrix Imaging window appears.
3. Click **Acquire**, and then click the desired procedure group tab (**Favorites**, **Standard**, or **Custom**).
4. Click the desired procedure, such as **4 Bitewings**, and then under **Acquisition method for this imaging exam**, select the acquisition method from the list.
5. Click **Start**.

The Dentrix Imaging window appears with the **History** tab selected. A number of gold stars appears above the image to indicate the quality of the image.



Notes:

- 1 to 3 stars trigger a message in a banner reading, "Consider Review or Retake."
- 4 to 5 stars trigger a message to the right of the image in the Feedback Panel reading, "No Issues Detected."
- No stars trigger a message in a banner reading, "No Quality Information Available."

Dentrix Forms

Before you can send your patients text messages via SMS, mobile carrier regulations now require you to register your practice.

Mobile carriers mandate that all healthcare practices must complete this registration before sending application-to-person (A2P) text messages.

The registration process:

- Verifies your practice as a legitimates sender
- Helps prevent spam and protects patients
- Is required before any SMS features can be used

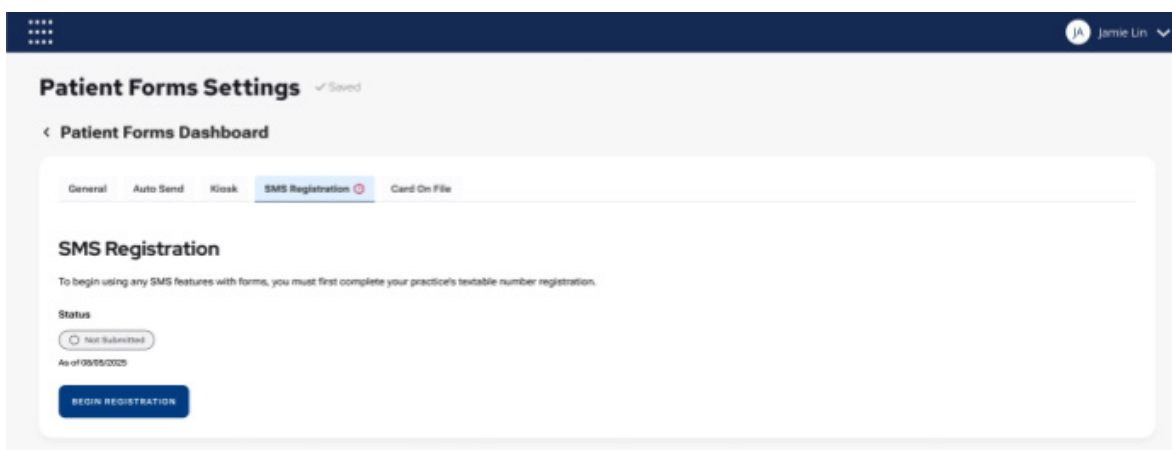
Once your registration is approved, Dentrix SMS features will automatically be enabled for your practice location.

To register your practice to send text messages via SMS

1. Have the following information ready before you begin. All details must exactly match your official legal or tax documents.

Field	Instructions
Legal Business Name	Must match IRS and legal documents exactly. Do not use DBA names unless they are registered.
Website URL	Example: https://yourpractice.com; If you do not have a website, a public business social media page (such as Facebook) is acceptable.
Business Type	Example: LLC, Corporation, Partnership, Non-Profit.
Employer Identification Number (EIN)	9-digit identification number in hyphenated format (12-3456789)
Company Type	Private; Public (NYSE ticker required); US Non-Profit.
Business Address	Must match your legal or tax records exactly.
Street Address	Legal business address.
City	Legal business address.
State	Legal business address.
Postal Code	Legal business address.
Country	Legal business address.

- In a Dentrix module, such as the Appointment Book, click the Forms toolbar button. The Forms Builder opens in your default browser.



- Click the Settings (gear) icon.
- Click the **SMS Registration** tab, and then click **Begin Registration**.
- To register, complete the following:
 - From the Form Builder, click the Settings (gear) icon.
 - Click the **SMS Registration** tab.
 - Click **Begin Registration**.
The **SMS Registration Form** appears.

The screenshot displays the 'Patient Forms Settings' dashboard with the 'SMS Registration' tab selected. A modal window titled 'SMS Registration Form' is open, containing the following fields:

- Business Information**
 - Legal Business Name (Text input: e.g. Ascend Dental Inc.)
 - Website URL (Text input: e.g. "https://www.dentrixascend.com")
 - Business Type (Dropdown menu: Select Item)
 - Business Registration Number (EIN) (Text input: e.g. 12-3456789)
 - Company Type (Dropdown menu: Select Item)
- Business Address**
 - Street Address Line 1 (Text input)
 - Street Address Line 2 (Optional) (Text input)
 - City (Text input)
 - State (Dropdown menu: Select Item)

A 'SUBMIT' button is located at the bottom of the form. The background dashboard shows a 'BEGIN REGISTRATION' button and a status indicator 'Not Submitted'.

- d. Type your **Business Information**.
- e. Type your **Business Address**.
- f. Click **Submit**.

Important:

- Do not close the window until you see a confirmation that your submission is complete.
 - You cannot edit submissions once they are submitted and are in a "pending" status.
6. To view your registration status, click the **SMS Registration** tab.

Dentrix 26.5

Overview and New Features

This Dentrix 26.5 Release Guide provides information about the Dentrix 26.5 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 26.5.

Note: For information about using the new features in Dentrix 26.5, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s new in Dentrix 26.5?” in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 26.5 includes the following enhancements:

THE REDESIGNED FAMILY FILE

The redesigned Family File is now available for all Beta offices to view and try out. We invite your feedback. For more information, please refer to [Previewing the new Family File](#) in the Dentrix Help.

LEDGER

The redesigned Ledger is available to a limited number of Beta offices to view and try out. We invite your feedback. For more information, please refer to [Previewing the new Ledger](#) in the Dentrix Help.

DENTRIX IMAGING

- You can now compare two, four, or six X-rays side by side enabling you to more easily evaluate changes over time with number and color indicators.
- The font size of the date in the image header was increased to be more readable.
- The vertical size of the procedure menu was increased to reduce scrolling.
- Support for workstation-level settings was added via the Acquisition Agent. Workstation settings apply to all users on a specific workstation.

Using the New Features and Enhancements

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

Opening the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. The cards in the redesigned Family File have now been rearranged to mirror the layout of the legacy Family File window.

Note: 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 open the redesigned Family File

1. From your desktop, double-click the Family File icon, and then from the **Select Patient** dialog box, select the desired patient.

The redesigned Family File appears.

Dentrix Family File - Young, Randall [Y00002] New Family File [LEAVE FEEDBACK](#)

File Edit Help

Young, Bridgette A Patient FORM STATUS HEALTH HISTORY ?

Patient Information		Consent	Missed Appointments	Chart #	Social Security #
Address	185 N 640 E, Cisco, UT, 84515	08/07/2024	-	Y00001	-
Mobile Phone #	-	First Visit	Last Visit	DL #	Birthdate
Home Phone #	(801)555-3043	08/07/2024	01/27/2026	-	09/25/2006, 19
Status	Patient, F, Child	Email	-	Provider	Fee Schedule
				DDS1	<Prov Default>

Health History	Employer	Continuing Care
<input type="checkbox"/> No health history on file	No employer information on file	01/28/2027 BITEWINGS
Primary Dental Insurance 2 dental, 1 medical		05/13/2026 PROPHY
Company	Group Plan	Group #
American Western Life	Central City Clinic	41336
Coverage	Used	Ded S/P/O
2500.00	122.00	50/0/0
Other Coverage		Fee Schedule
-		Met
		0/0/0

Payment & Billing Information	Referred By
Payment Amount	No incoming referrals
N/A	
Amount Past Due	Referred To
N/A	No outgoing referrals
Billing Type	
4	
Last Payment	
N/A	
0 --> 30	
31 --> 60	
61 --> 90	
91 -->	
Balance	
-14869.00	
0.00	
0.00	
0.00	
-14869.00	

Status	Name	Position	Gender	Patient	Birthdate
HoH Guar Ins	Young, Randall	Married	Male	Yes	08/18/1972
Ins	Young, Tina	Married	Female	Yes	06/14/1976
-	Young, Bridgette	Child	Female	Yes	09/25/2006

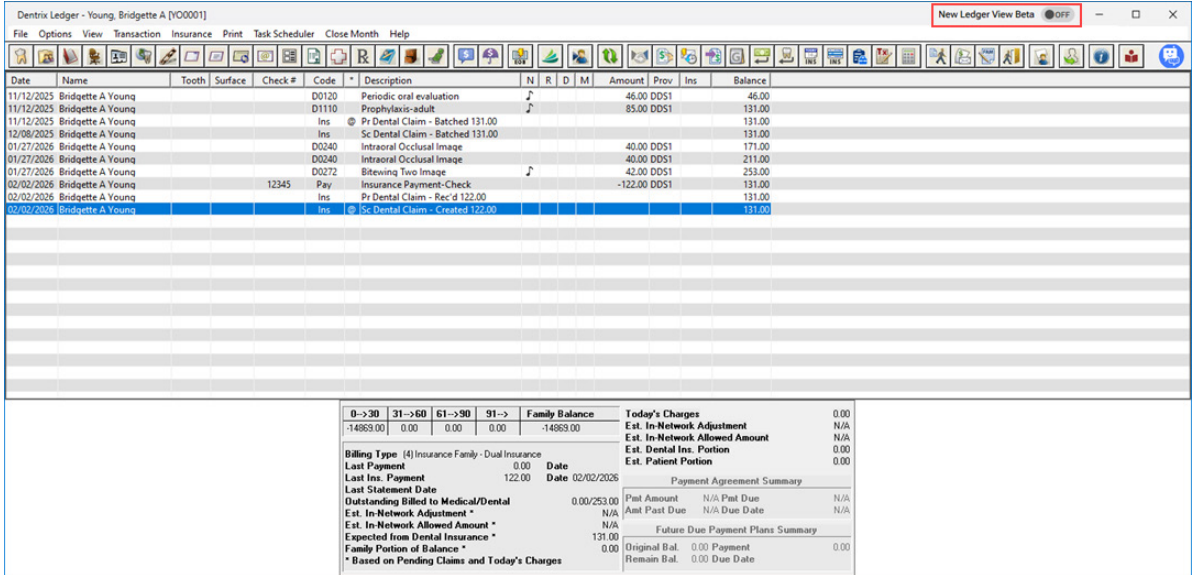
Previewing the Redesigned Ledger

At Henry Schein One, we're redesigning the Ledger window to make it more intuitive and easier to use.

To preview the redesigned Ledger

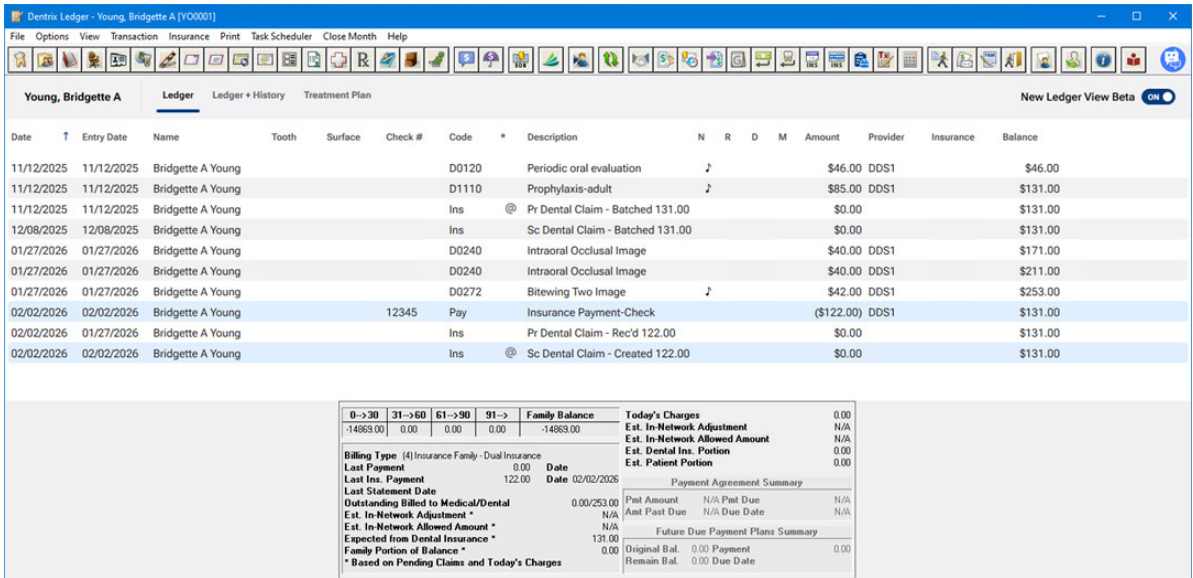
1. Open the legacy Ledger, and select a patient.

The Ledger window appears.



- To preview the new Ledger, click the New Ledger View Beta toggle.

The redesigned Ledger window appears.



- To view a claim, double-click it.

If you have switched to the new claim window, the redesigned Insurance Claim window appears.

Young, Bridgette A - Primary Dental Insurance Claim (11/12/2025) Batched New Claim Window LEAVE FEEDBACK

Young, Bridgette A Primary Secondary [PLAN DETAILS](#) [ENTER PAYMENT](#) ?

Primary Insurance						<input checked="" type="checkbox"/> Release of Info <input checked="" type="checkbox"/> Assignment of Benefits	
Subscriber	Employer	Carrier	Group Plan	Payor ID			
Young, Randall	Central City Clinic	American Western Life	Central City Clinic				
Billing Provider	Rendering Provider	Pay-To-Provider	Claim Information				
Smith, Dennis	Smith, Dennis	Smith, Dennis	Non-Standard				
Procedures							
Tooth	Surface	Description	Procedure Date	Code	Fee	Ins. Paid	
		Periodic oral evaluation	11/12/2025	D0120	\$46.00	\$0.00	
		Prophylaxis-adult	11/12/2025	D1110	\$85.00	\$0.00	
Attachments				Diagnostic Codes			
Type	Description			When a diagnostic code is added, it will appear here.			
Radiology Films	Imaging Attachment						
Payments				Claim Financial Summary			
When a payment is made, it will appear here.				Total Billed	\$131.00		
				Est. Ins. Portion	\$131.00		
				Itemized Total	\$0.00		
				Total Paid	\$0.00		
				Total Credit Adj.	\$0.00		
				Total Charge Adj.	\$0.00		
				Ded S/P/O:	0/0/0		
Adjustments				Insurance Plan Note			
When an adjustment is made, it will appear here.				This is a test note.			
				Remarks For Unusual Services			
				Click to add a remark.			
Claim Status							
Created	Sent	Partial Payment					
11/12/2025	11/12/2025						
Date	Claim Status						
01/16/2026	Sent						
11/12/2025	Batched						
11/12/2025	Created						

4. To view all the transactions for the selected patient, click the **Ledger + History** tab.

Dentrix Ledger + History - Young, Bridgette A [Y00001]

File Options View Transaction Insurance Print Task Scheduler Close Month Help

Young, Bridgette A Ledger Ledger + History Treatment Plan New Ledger View Beta

Date	Entry Date	Name	Tooth	Surface	Check #	Code	Description	N	R	D	M	Amount	Provider	Insurance	Balance
11/12/2025	11/12/2025	Bridgette A Young				D0120	Periodic oral evaluation					\$46.00	DDS1		\$46.00
11/12/2025	11/12/2025	Bridgette A Young				D1110	Prophylaxis-adult					\$85.00	DDS1		\$131.00
11/12/2025	11/12/2025	Bridgette A Young				Ins	Pr Dental Claim - Batched 131.00					\$0.00			\$131.00
12/08/2025	12/08/2025	Bridgette A Young				Ins	Sc Dental Claim - Batched 131.00					\$0.00			\$131.00
01/27/2026	01/27/2026	Bridgette A Young				D0240	Intraoral Occlusal Image					\$40.00	DDS1		\$171.00
01/27/2026	01/27/2026	Bridgette A Young				D0240	Intraoral Occlusal Image					\$40.00	DDS1		\$211.00
01/27/2026	01/27/2026	Bridgette A Young				D0272	Bitewing Two Image					\$42.00	DDS1		\$253.00
02/02/2026	02/02/2026	Bridgette A Young			12345	Pay	Insurance Payment-Check					(\$122.00)	DDS1		\$131.00
02/02/2026	01/27/2026	Bridgette A Young				Ins	Pr Dental Claim - Rec'd 122.00					\$0.00			\$131.00
02/02/2026	02/02/2026	Bridgette A Young				Ins	Sc Dental Claim - Created 122.00					\$0.00			\$131.00

<table border="0" style="width: 100%;"> <tr> <td>0->30</td> <td>31->60</td> <td>61->90</td> <td>91-></td> <td>Family Balance</td> <td>Today's Charges</td> <td>0.00</td> </tr> <tr> <td>-14869.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>-14869.00</td> <td>Est. In-Network Adjustment</td> <td>N/A</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Est. In-Network Allowed Amount</td> <td>N/A</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Est. Dental Ins. Portion</td> <td>0.00</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Est. Patient Portion</td> <td>0.00</td> </tr> </table>	0->30	31->60	61->90	91->	Family Balance	Today's Charges	0.00	-14869.00	0.00	0.00	0.00	-14869.00	Est. In-Network Adjustment	N/A						Est. In-Network Allowed Amount	N/A						Est. Dental Ins. Portion	0.00						Est. Patient Portion	0.00	<table border="0" style="width: 100%;"> <tr> <td colspan="2">Billing Type (4) Insurance Family - Dual Insurance</td> <td colspan="2">Payment Agreement Summary</td> </tr> <tr> <td>Last Payment</td> <td>0.00</td> <td>Date</td> <td>02/02/2025</td> </tr> <tr> <td>Last Ins. Payment</td> <td>122.00</td> <td>Date</td> <td>02/02/2025</td> </tr> <tr> <td>Last Statement Date</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Outstanding Billed to Medical/Dental</td> <td>0.00/253.00</td> <td>Pat Amount</td> <td>N/A Pat Due</td> </tr> <tr> <td>Est. In-Network Adjustment *</td> <td>N/A</td> <td>Amst Past Due</td> <td>N/A Due Date</td> </tr> <tr> <td>Est. In-Network Allowed Amount *</td> <td>N/A</td> <td></td> <td></td> </tr> <tr> <td>Expected from Dental Insurance *</td> <td>131.00</td> <td colspan="2">Future Due Payment Plans Summary</td> </tr> <tr> <td>Family Portion of Balance *</td> <td>0.00</td> <td>Original Bal.</td> <td>0.00 Payment</td> </tr> <tr> <td>* Based on Pending Claims and Today's Charges</td> <td></td> <td>Remain Bal.</td> <td>0.00 Due Date</td> </tr> </table>	Billing Type (4) Insurance Family - Dual Insurance		Payment Agreement Summary		Last Payment	0.00	Date	02/02/2025	Last Ins. Payment	122.00	Date	02/02/2025	Last Statement Date				Outstanding Billed to Medical/Dental	0.00/253.00	Pat Amount	N/A Pat Due	Est. In-Network Adjustment *	N/A	Amst Past Due	N/A Due Date	Est. In-Network Allowed Amount *	N/A			Expected from Dental Insurance *	131.00	Future Due Payment Plans Summary		Family Portion of Balance *	0.00	Original Bal.	0.00 Payment	* Based on Pending Claims and Today's Charges		Remain Bal.	0.00 Due Date
0->30	31->60	61->90	91->	Family Balance	Today's Charges	0.00																																																																						
-14869.00	0.00	0.00	0.00	-14869.00	Est. In-Network Adjustment	N/A																																																																						
					Est. In-Network Allowed Amount	N/A																																																																						
					Est. Dental Ins. Portion	0.00																																																																						
					Est. Patient Portion	0.00																																																																						
Billing Type (4) Insurance Family - Dual Insurance		Payment Agreement Summary																																																																										
Last Payment	0.00	Date	02/02/2025																																																																									
Last Ins. Payment	122.00	Date	02/02/2025																																																																									
Last Statement Date																																																																												
Outstanding Billed to Medical/Dental	0.00/253.00	Pat Amount	N/A Pat Due																																																																									
Est. In-Network Adjustment *	N/A	Amst Past Due	N/A Due Date																																																																									
Est. In-Network Allowed Amount *	N/A																																																																											
Expected from Dental Insurance *	131.00	Future Due Payment Plans Summary																																																																										
Family Portion of Balance *	0.00	Original Bal.	0.00 Payment																																																																									
* Based on Pending Claims and Today's Charges		Remain Bal.	0.00 Due Date																																																																									

5. To view the selected patient's treatment plans, click the **Treatment Plan** tab.

Date	Entry Date	Name	Tooth	Surface	Check #	Code *	Description	N	R	D	M	Amount	Provider	Insurance	Balance
12/01/2025	12/01/2025	Bridgette A Young				D0120	Periodic oral evaluation					\$46.00	DDS1		\$46.00
12/01/2025	12/01/2025	Bridgette A Young				D0274	Biting Four Image					\$59.00	DDS1		\$105.00
12/01/2025	12/01/2025	Bridgette A Young				D1110	Prophylaxis-adult					\$85.00	DDS1		\$190.00
12/08/2025	12/08/2025	Bridgette A Young				Ins	Pr Dental PreAuth- Batched 190.00					\$0.00			\$190.00
12/08/2025	12/08/2025	Bridgette A Young				Ins	Sc Dental PreAuth- Created 190.00					\$0.00			\$190.00
12/16/2025	12/16/2025	Bridgette A Young	30			D2792	Crown-full cast noble metal					\$950.00	DDS1		\$1,140.00
12/16/2025	12/16/2025	Bridgette A Young	30			D3330	Endo therapy - molar (ex rest)					\$930.00	DDS1		\$2,070.00
12/16/2025	12/16/2025	Bridgette A Young				Ins	Pr Dental PreAuth- Created 1880.00					\$0.00			\$2,070.00

0->30	31->60	61->90	91->	Family Balance	Treatment Plan Total
-14863.00	0.00	0.00	0.00	-14863.00	2070.00

Billing Type	(4) Insurance Family - Dual Insurance	Date	0.00	02/02/2026
Last Payment				
Last Ins. Payment	122.00			
Last Statement Date				
Outstanding Billed to Medical/Dental	0.00/253.00			
Est. In-Network Adjustment *	N/A			
Est. In-Network Allowed Amount *	N/A			
Expected from Dental Insurance *	131.00			
Family Portion of Balance *	0.00			
* Based on Pending Claims and Today's Charges				

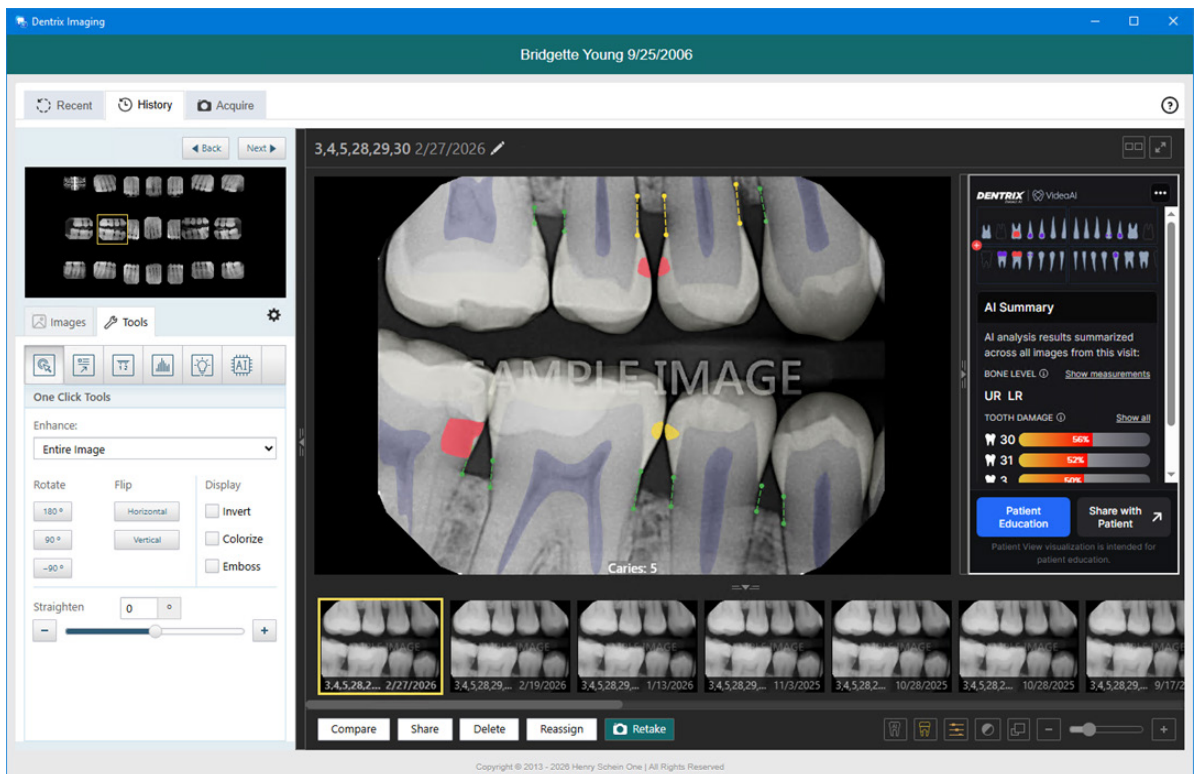
Dentrix Imaging

You can now compare two, four, or six X-rays side by side enabling you to more easily evaluate changes over time.

To compare images

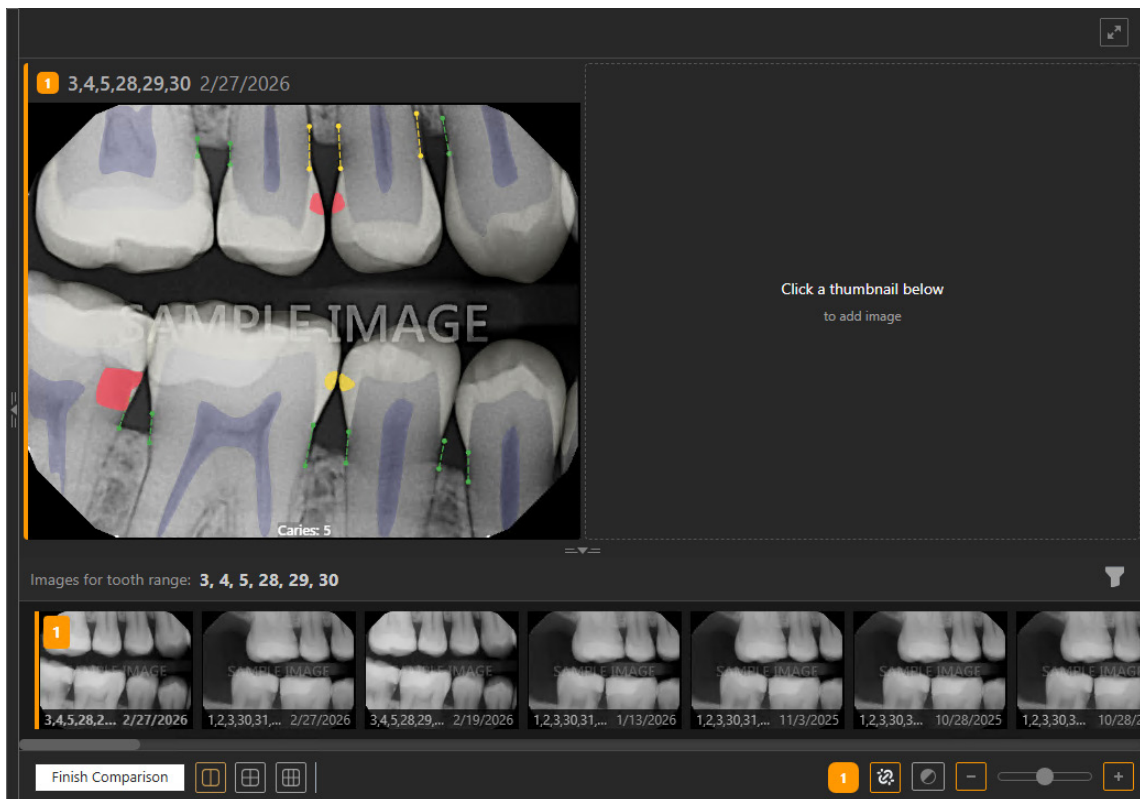
1. Open the Patient Chart and select a patient.
2. In the Imaging toolbar, click the Launch Dentrix Imaging icon.

The Dentrix Imaging window appears.

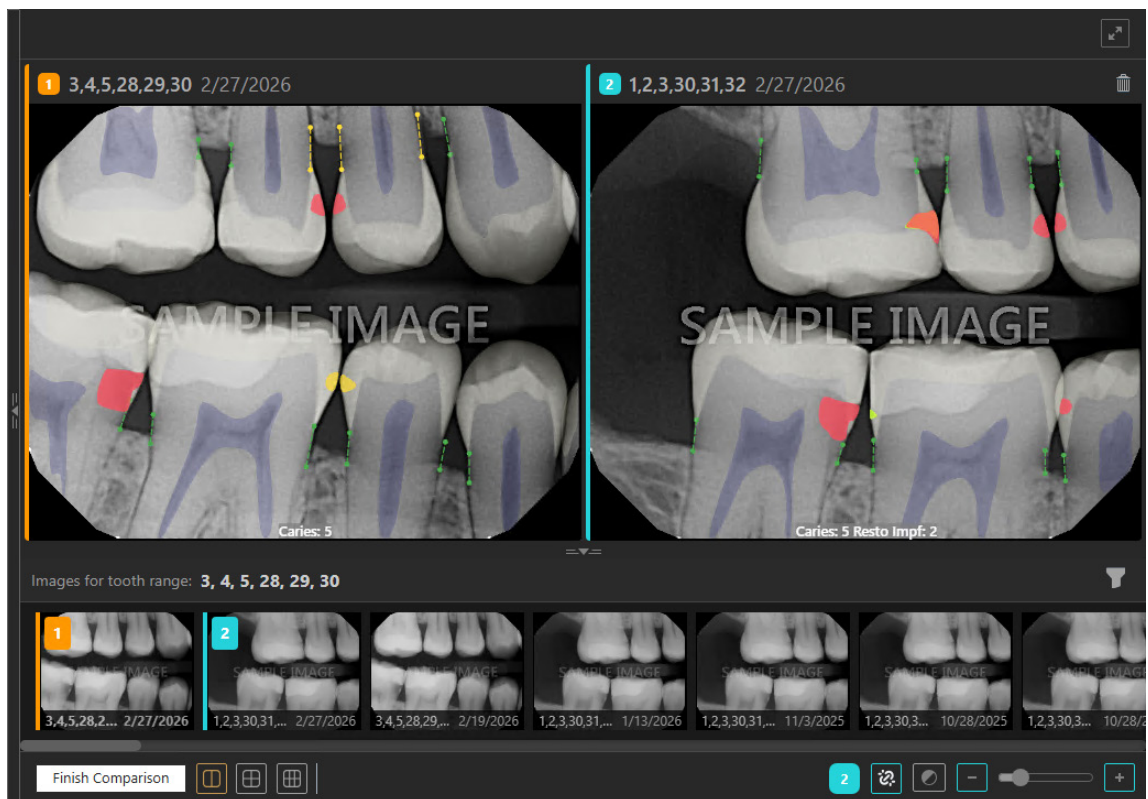


3. Click Compare.

The images that have tooth numbers in common with the selected image (the "Original") appear on the Images for tooth range panel. By default, the most recent image appears in the Compare panel.



- a. To compare the most recent image to a second image, click the desired image.



- b. To compare four images, click the Four images icon, and then click another two images.



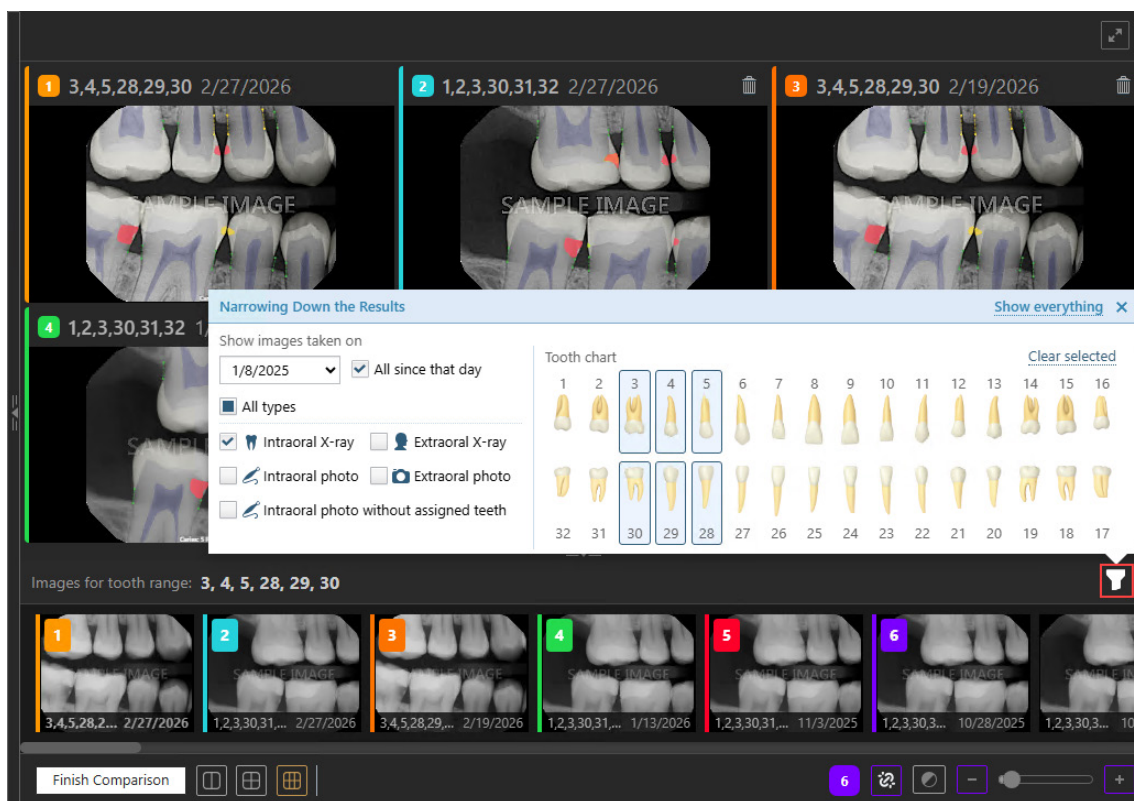
- c. To compare six images, click the Six images icon, and then click another two images.



Note: If you are using Dentrix Detect AI, those results will also appear when you compare images.

- If needed, you can filter the Images for tooth range panel to display only the images that match the filter criteria that you specify.

- a. Click the Filter images icon (at the top of the panel) to view the available filters.

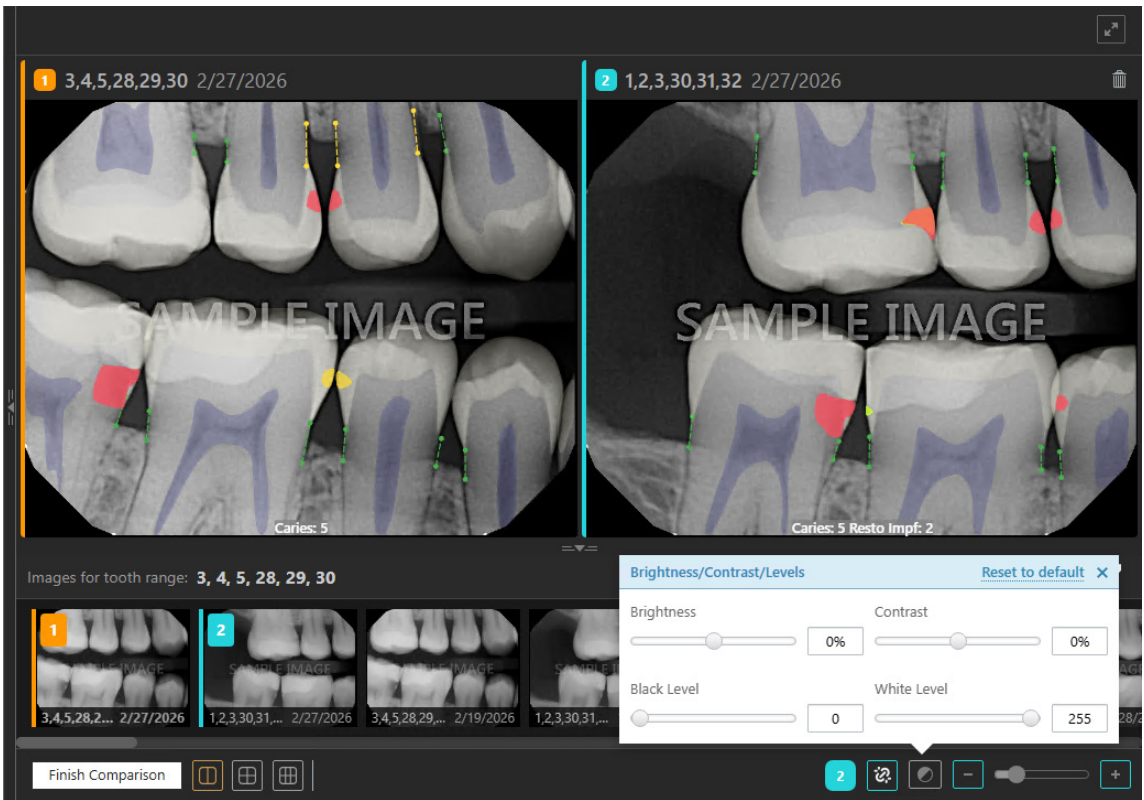


- b. Set up any of the following filters:

- **Date** – To view the images according to a different date, select the desired date in the list under **Show images taken on**. To view all images that have been acquired on and after the selected date, select the **All since that day** check box. To view the images that were acquired only on the selected date, clear the **All since that day** check box.
- **Type** – To view images in any category (intraoral X-rays, intraoral photos, intraoral photos without tooth numbers assigned, extraoral X-rays, extraoral photos, CAD/CAM/iOS scans, and 3D volumes), select the **All types** check box. To view images in only certain categories, make sure the check boxes of only those categories are selected; the other check boxes must be cleared.
- **Teeth** – If the Intraoral X-ray and/or Intraoral photo check boxes are selected, to view those types of images for specific teeth, select the desired teeth on the Tooth Chart. The tooth filter does not apply to intraoral photos that do not have tooth numbers assigned to them and extraoral X-rays (which apply to all teeth), and extraoral photos (which apply to all teeth). To clear all tooth selections, click the **Clear selected** link.
- **Show everything** – To set the filter options to their default states and display all the patient's images, click the **Show everything** link.

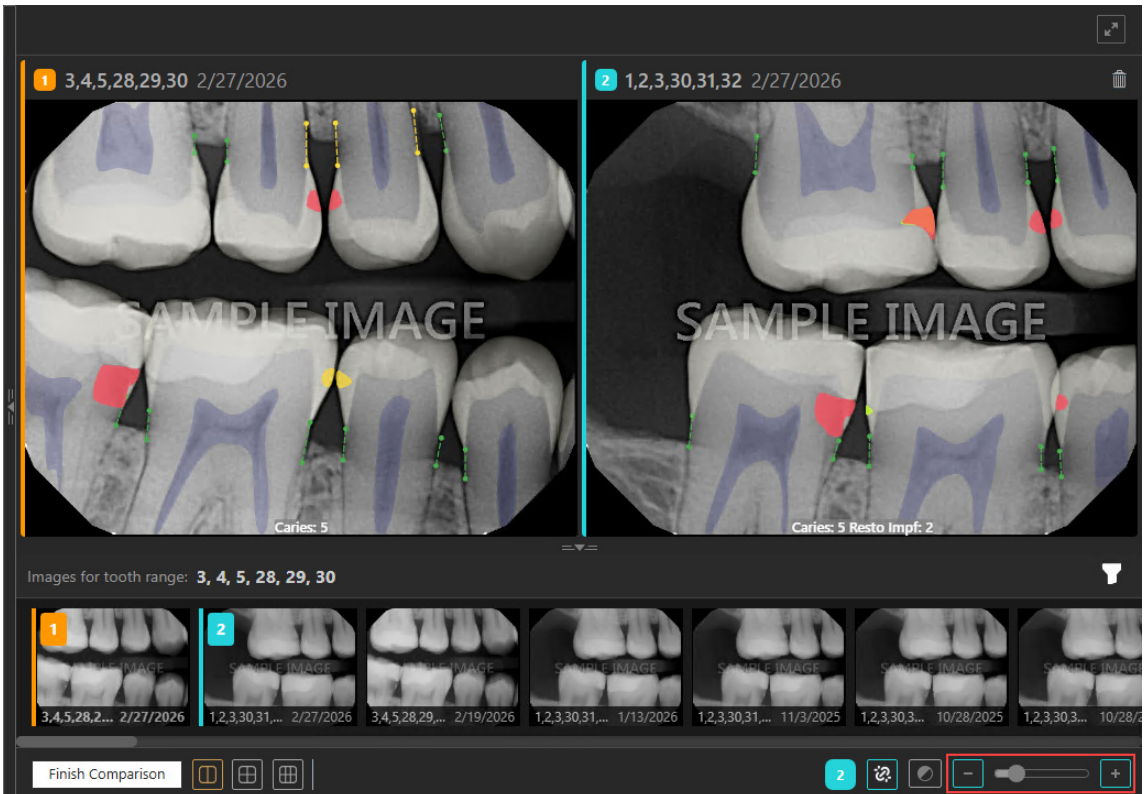
- c. To close the menu, click the X in the upper-right corner of or anywhere outside of the **Narrowing Down the Results** menu.

5. The first image on the Images for tooth range panel is selected by default, but you can select a different image to compare with the original.
6. To modify how an image is being viewed, in the Compare panel, click the desired numbered image (1-6), and then do any of the following for the selected image:
 - **Adjust the brightness, contrast, and black /white levels icon** – Click to change the brightness, contrast, and black and white levels of the selected image.

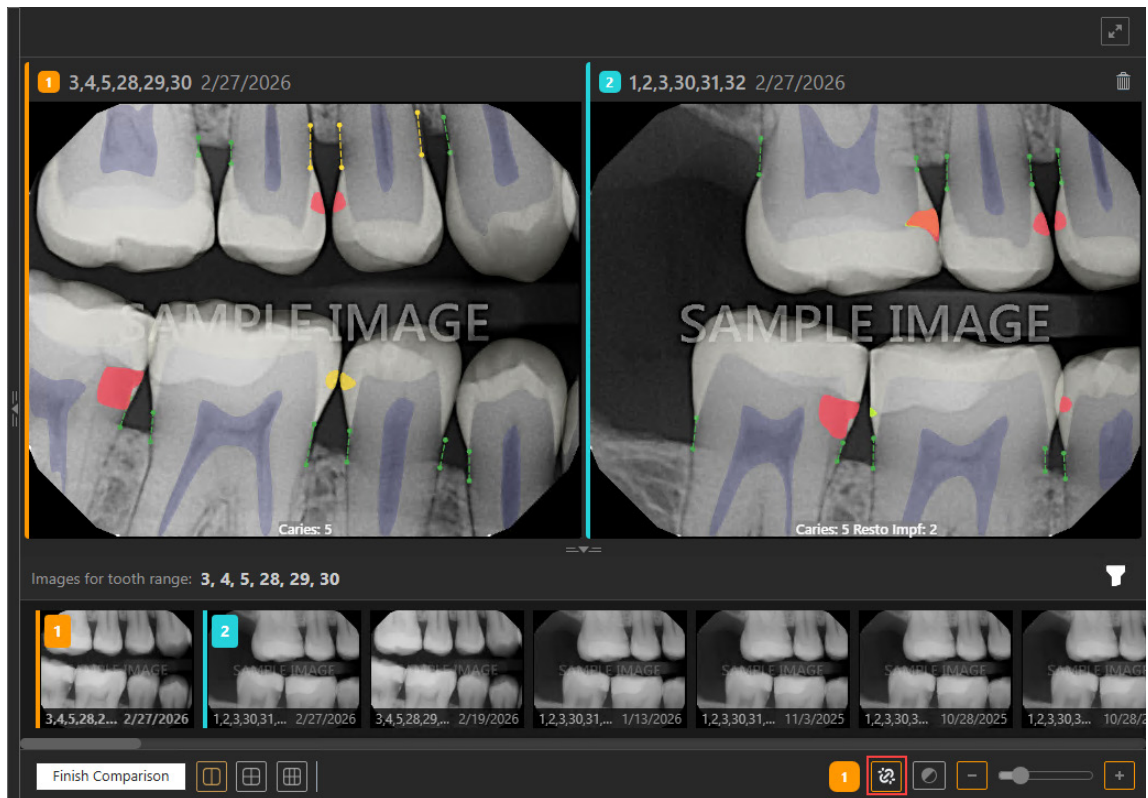


Note: You can perform brightness/contrast adjustments over the entire image area canvas. The zoomed size of the image does not affect the range of the brightness/contrast adjustments you make.

- Zoom slider – Use the Zoom slider to zoom in and out.



7. Linking the images being compared allows the zooming and panning of one image to be synchronized with the other. To link images, do the following:
 - a. Click the desired image (zoomed and panned or not).

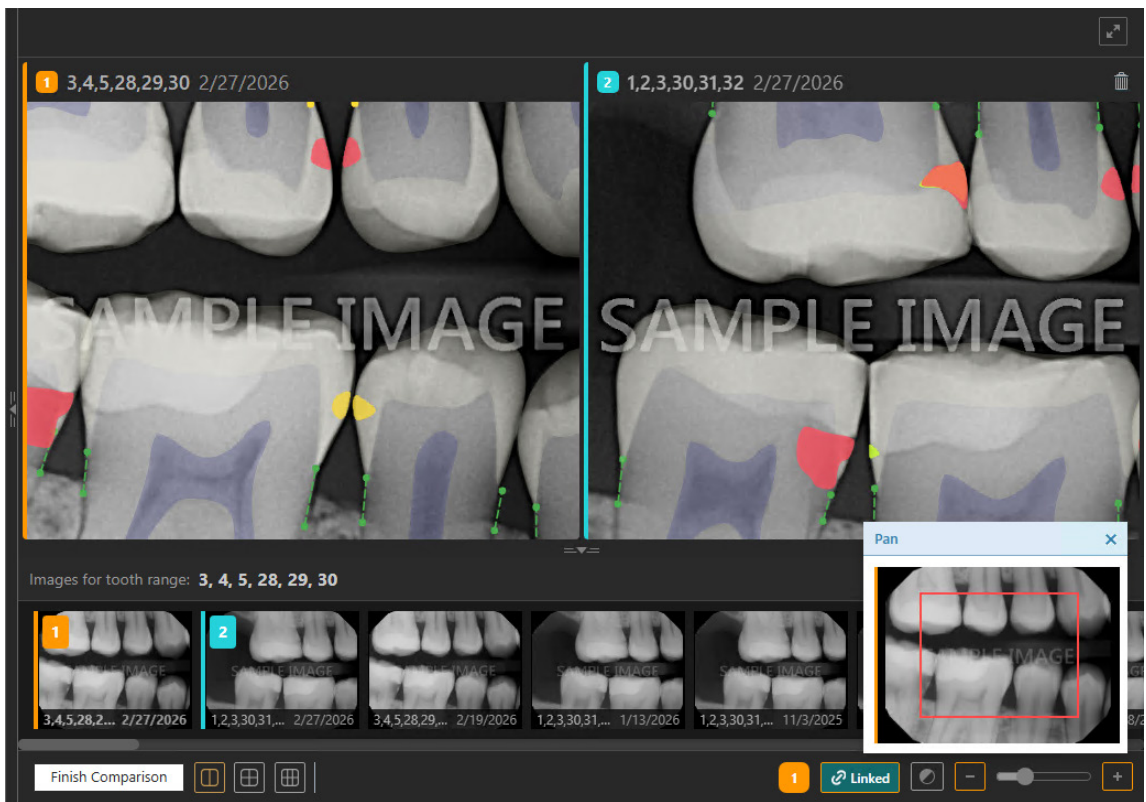


- b. Click the Link/unlink zoom factor icon.

The images are linked.

Note: If you alter the zoom and/or pan of an image before linking it to the other, when you link them, the zoom factor and the position of the pan box (red box) of the other image is synchronized to be the same as the first.

Now, as you zoom in and out and pan, both images are affected.



Note: To unlink the images, click the **Linked** button.

8. Click **Finish Comparison**.

Dentrix 26.4

Overview and New Features

This Dentrix 26.4 Release Guide provides information about the Dentrix 26.4 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 26.4.

Note: For information about using the new features in Dentrix 26.4, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s new in Dentrix 26.4?” in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 26.4 includes the following enhancements:

THE REDESIGNED FAMILY FILE

The redesigned Family File is now available for all Beta offices to view and try out. We invite your feedback. For more information, please refer to [Previewing the new Family File](#) in the Dentrix Help.

LEDGER

The redesigned Ledger is available to a limited number of Beta offices to view and try out. We invite your feedback. For more information, please refer to [Previewing the new Ledger](#) in the Dentrix Help.

FORMS

- You can now resend forms to patients whether they have a future scheduled appointment or not.
- The tooltip for the Send Reminder button in the Forms dialog box was updated to read, “Resend Forms that are Not Started.”

Using the New Features and Enhancements

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

Opening the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. The cards in the redesigned Family File have now been rearranged to mirror the layout of the legacy Family File window.

Note: 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 open the redesigned Family File

1. From your desktop, double-click the Family File icon, and then from the **Select Patient** dialog box, select the desired patient.

The redesigned Family File appears.

Dentrix Family File - Davis, Karen [DA0003] New Family File [LEAVE FEEDBACK](#)

File Edit Help

Davis, Karen Patient **FORM STATUS** **HEALTH HISTORY** ?

Contact Information		Appointment Details		Patient Information			
Mobile Phone #	Home Phone #	First Visit	Last Visit	Chart #	Gender	Birthdate	Social Security #
-	(801)555-1530	08/06/2024	09/22/2025	DA0003	Female	06/17/1977, 48	000-00-0007
Email	-	Next Visit	Missed Appointments	Provider	Fee Schedule	DL #	HofH / Guarantor
-	-	-	1 Missed, 1 Broken	DDS1	<Prov Default>	-	Yes
Address	1768 N 150 W, Cisco, UT, 84515			Ins. Subscriber	Position	Yes	
1 dental				Continuing Care			
Company	Group Plan	Group #	Fee Schedule	02/13/2026 PROPHY			
Equicor Cigna	Noble	18550	-	09/23/2026 BITEWINGS			
Coverage	Used	Ded S/P/O	Met				
3500.00	0.00	25/0/0	0/0/0				
Other Coverage	-			Employer			
				Noble Finance			
Payment & Billing Information				Emergency Contact			
Payment Amount	Amount Past Due	Billing Type	Last Payment	Contact Name	Relationship	Phone #	
-	-	1	0.00	-	-	-	
0 --> 30	31 --> 60	61 --> 90	91 -->	Balance			
1577.00	0.00	0.00	0.00	1577.00			
Notes				Referrals			
Notes are Hidden Click "Show Notes" to see any notes on file.				Referred	Referral Type	Individual or Source	Date of Referral
				By	Patient	Mr. Dean Little	08/06/2024
Upcoming Appointments							

Previewing the Redesigned Ledger

At Henry Schein One, we're redesigning the Ledger window to make it more intuitive and easier to use.

To preview the redesigned Ledger

1. Open the legacy Ledger, and select a patient.

The Ledger window appears.

Date	Name	Tooth	Surface	Check #	Code	Description	N	R	D	M	Amount	Prov	Ins	Balance
11/12/2025	Bridgette A Young				D0120	Periodic oral evaluation					46.00	DDS1		46.00
11/12/2025	Bridgette A Young				D1110	Prophylaxis-adult					85.00	DDS1		131.00
11/12/2025	Bridgette A Young				Ins	Pr Dental Claim - Batched 131.00								131.00
12/08/2025	Bridgette A Young				Ins	Sc Dental Claim - Batched 131.00								131.00
01/27/2026	Bridgette A Young				D0240	Intraoral Occlusal Image					40.00	DDS1		171.00
01/27/2026	Bridgette A Young				D0240	Intraoral Occlusal Image					40.00	DDS1		211.00
01/27/2026	Bridgette A Young				D0272	Bitewing Two Image					42.00	DDS1		253.00
02/02/2026	Bridgette A Young			12345	Pay	Insurance Payment-Check					-122.00	DDS1		131.00
02/02/2026	Bridgette A Young				Ins	Pr Dental Claim - Rec'd 122.00								131.00
02/02/2026	Bridgette A Young				Ins	Sc Dental Claim - Created 122.00								131.00

0->30	31->60	61->90	91->	Family Balance	Today's Charges
-14893.00	0.00	0.00	0.00	-14893.00	0.00
					Est. In-Network Adjustment
					N/A
					Est. In-Network Allowed Amount
					N/A
					Est. Dental Ins. Portion
					0.00
					Est. Patient Portion
					0.00

Billing Type 14) Insurance Family - Dual Insurance	Date 02/02/2026	Payment Agreement Summary	
Last Payment 0.00	Last Ins. Payment 122.00	Payment	Agmt
Last Statement Date	Outstanding Billed to Medical/Dental 0.00/253.00	Original Bal. 0.00	Payment 0.00
Est. In-Network Adjustment * N/A	Est. In-Network Allowed Amount * N/A	Remain Bal. 0.00	Due Date
Est. In-Network Allowed Amount * N/A	Expected from Dental Insurance * 131.00	Future Due Payment Plans Summary	
Family Portion of Balance * 0.00	* Based on Pending Claims and Today's Charges		

- To preview the new Ledger, click the New Ledger View Beta toggle. The redesigned Ledger window appears.

Date	Entry Date	Name	Tooth	Surface	Check #	Code	Description	N	R	D	M	Amount	Provider	Insurance	Balance
11/12/2025	11/12/2025	Bridgette A Young				D0120	Periodic oral evaluation					\$46.00	DDS1		\$46.00
11/12/2025	11/12/2025	Bridgette A Young				D1110	Prophylaxis-adult					\$85.00	DDS1		\$131.00
11/12/2025	11/12/2025	Bridgette A Young				Ins	Pr Dental Claim - Batched 131.00					\$0.00			\$131.00
12/08/2025	12/08/2025	Bridgette A Young				Ins	Sc Dental Claim - Batched 131.00					\$0.00			\$131.00
01/27/2026	01/27/2026	Bridgette A Young				D0240	Intraoral Occlusal Image					\$40.00	DDS1		\$171.00
01/27/2026	01/27/2026	Bridgette A Young				D0240	Intraoral Occlusal Image					\$40.00	DDS1		\$211.00
01/27/2026	01/27/2026	Bridgette A Young				D0272	Bitewing Two Image					\$42.00	DDS1		\$253.00
02/02/2026	02/02/2026	Bridgette A Young			12345	Pay	Insurance Payment-Check					(\$122.00)	DDS1		\$131.00
02/02/2026	01/27/2026	Bridgette A Young				Ins	Pr Dental Claim - Rec'd 122.00					\$0.00			\$131.00
02/02/2026	02/02/2026	Bridgette A Young				Ins	Sc Dental Claim - Created 122.00					\$0.00			\$131.00

0->30	31->60	61->90	91->	Family Balance	Today's Charges
-14893.00	0.00	0.00	0.00	-14893.00	0.00
					Est. In-Network Adjustment
					N/A
					Est. In-Network Allowed Amount
					N/A
					Est. Dental Ins. Portion
					0.00
					Est. Patient Portion
					0.00

Billing Type 14) Insurance Family - Dual Insurance	Date 02/02/2026	Payment Agreement Summary	
Last Payment 0.00	Last Ins. Payment 122.00	Payment	Agmt
Last Statement Date	Outstanding Billed to Medical/Dental 0.00/253.00	Original Bal. 0.00	Payment 0.00
Est. In-Network Adjustment * N/A	Est. In-Network Allowed Amount * N/A	Remain Bal. 0.00	Due Date
Est. In-Network Allowed Amount * N/A	Expected from Dental Insurance * 131.00	Future Due Payment Plans Summary	
Family Portion of Balance * 0.00	* Based on Pending Claims and Today's Charges		

- To view a claim, double-click it. If you have switched to the new claim window, the redesigned Insurance Claim window appears.

Young, Bridgette A - Primary Dental Insurance Claim (11/12/2025) Batched New Claim Window LEAVE FEEDBACK

Young, Bridgette A Primary Secondary [PLAN DETAILS](#) [ENTER PAYMENT](#) ?

Primary Insurance						<input checked="" type="checkbox"/> Release of Info <input checked="" type="checkbox"/> Assignment of Benefits	
Subscriber	Employer	Carrier	Group Plan	Payor ID			
Young, Randall	Central City Clinic	American Western Life	Central City Clinic				
Billing Provider	Rendering Provider	Pay-To-Provider	Claim Information				
Smith, Dennis	Smith, Dennis	Smith, Dennis	Non-Standard				
Procedures							
Tooth	Surface	Description	Procedure Date	Code	Fee	Ins. Paid	
		Periodic oral evaluation	11/12/2025	D0120	\$46.00	\$0.00	
		Prophylaxis-adult	11/12/2025	D1110	\$85.00	\$0.00	
Attachments				Diagnostic Codes			
Type	Description			When a diagnostic code is added, it will appear here.			
Radiology Films	Imaging Attachment						
Payments				Claim Financial Summary			
When a payment is made, it will appear here.				Total Billed	\$131.00		
				Est. Ins. Portion	\$131.00		
				Itemized Total	\$0.00		
				Total Paid	\$0.00		
				Total Credit Adj.	\$0.00		
				Total Charge Adj.	\$0.00		
				Ded S/P/O:	0/0/0		
Adjustments				Insurance Plan Note			
When an adjustment is made, it will appear here.				This is a test note.			
				Remarks For Unusual Services			
				Click to add a remark.			
Claim Status							
Created	Sent	Partial Payment					
11/12/2025	11/12/2025						
Date	Claim Status						
01/16/2026	Sent						
11/12/2025	Batched						
11/12/2025	Created						

4. To view all the transactions for the selected patient, click the **Ledger + History** tab.

Dentrix Ledger + History - Young, Bridgette A [Y00001]

File Options View Transaction Insurance Print Task Scheduler Close Month Help

Young, Bridgette A Ledger Ledger + History Treatment Plan New Ledger View Beta

Date	Entry Date	Name	Tooth	Surface	Check #	Code	*	Description	N	R	D	M	Amount	Provider	Insurance	Balance
11/12/2025	11/12/2025	Bridgette A Young				D0120		Periodic oral evaluation	J				\$46.00	DDS1		\$46.00
11/12/2025	11/12/2025	Bridgette A Young				D1110		Prophylaxis-adult	J				\$85.00	DDS1		\$131.00
11/12/2025	11/12/2025	Bridgette A Young				Ins	@	Pr Dental Claim - Batched 131.00					\$0.00			\$131.00
12/08/2025	12/08/2025	Bridgette A Young				Ins		Sc Dental Claim - Batched 131.00					\$0.00			\$131.00
01/27/2026	01/27/2026	Bridgette A Young				D0240		Intraoral Occlusal Image					\$40.00	DDS1		\$171.00
01/27/2026	01/27/2026	Bridgette A Young				D0240		Intraoral Occlusal Image					\$40.00	DDS1		\$211.00
01/27/2026	01/27/2026	Bridgette A Young				D0272		Bitewing Two Image	J				\$42.00	DDS1		\$253.00
02/02/2026	02/02/2026	Bridgette A Young			12345	Pay		Insurance Payment-Check					(\$122.00)	DDS1		\$131.00
02/02/2026	01/27/2026	Bridgette A Young				Ins		Pr Dental Claim - Rec'd 122.00					\$0.00			\$131.00
02/02/2026	02/02/2026	Bridgette A Young				Ins	@	Sc Dental Claim - Created 122.00					\$0.00			\$131.00

0->30	31->60	61->90	91->	Family Balance	Today's Charges	0.00
-14869.00	0.00	0.00	0.00	-14869.00	Est. In-Network Adjustment	N/A
					Est. In-Network Allowed Amount	N/A
					Est. Dental Ins. Portion	0.00
					Est. Patient Portion	0.00
Billing Type (4) Insurance Family - Dual Insurance						
Last Payment					0.00	Date
Last Ins. Payment					122.00	Date
Last Statement Date						02/02/2025
Outstanding Billed to Medical/Dental					0.00/253.00	
Est. In-Network Adjustment *					N/A	Pat Amount
Est. In-Network Allowed Amount *					N/A	N/A Pat Due
Expected from Dental Insurance *					131.00	Pat Past Due
Family Portion of Balance *					0.00	N/A Due Date
* Based on Pending Claims and Today's Charges						
					Payment Agreement Summary	
					Original Bal.	0.00
					Payment	0.00
					Remain Bal.	0.00
					Due Date	
					Future Due Payment Plans Summary	

5. To view the selected patient's treatment plans, click the **Treatment Plan** tab.

Date	Entry Date	Name	Tooth	Surface	Check #	Code *	Description	N	R	D	M	Amount	Provider	Insurance	Balance
12/01/2025	12/01/2025	Bridgette A Young				D0120	Periodic oral evaluation					\$46.00	DDS1		\$46.00
12/01/2025	12/01/2025	Bridgette A Young				D0274	Biting Four Image					\$59.00	DDS1		\$105.00
12/01/2025	12/01/2025	Bridgette A Young				D1110	Prophylaxis-adult					\$85.00	DDS1		\$190.00
12/08/2025	12/08/2025	Bridgette A Young				Ins	Pr Dental PreAuth- Batched 190.00					\$0.00			\$190.00
12/08/2025	12/08/2025	Bridgette A Young				Ins	Sc Dental PreAuth- Created 190.00					\$0.00			\$190.00
12/16/2025	12/16/2025	Bridgette A Young	30			D2792	Crown-full cast noble metal					\$950.00	DDS1		\$1,140.00
12/16/2025	12/16/2025	Bridgette A Young	30			D3330	Endo therapy - molar (ex rest)					\$930.00	DDS1		\$2,070.00
12/16/2025	12/16/2025	Bridgette A Young				Ins	Pr Dental PreAuth- Created 1880.00					\$0.00			\$2,070.00

0->30	31->60	61->90	91->	Family Balance	Treatment Plan Total
-14863.00	0.00	0.00	0.00	-14863.00	2070.00

Billing Type (4) Insurance Family - Dual Insurance		Date		Payment Agreement Summary	
Last Payment	0.00	Date	02/02/2026	Pat Amount	N/A Past Due N/A
Last Ins. Payment	122.00	Date	02/02/2026	Am't Past Due	N/A Due Date N/A
Last Statement Date	0.00/253.00	Original Bal.	0.00	Payment	0.00
Outstanding Billed to Medical/Dental	0.00/253.00	Remain Bal.	0.00	Due Date	
Est. In-Network Adjustment *	N/A				
Est. In-Network Allowed Amount *	N/A				
Expected from Dental Insurance *	131.00				
Family Portion of Balance *	0.00				

Forms

Enhancements to Forms include the following:

- You can now resend forms to patients whether they have a future scheduled appointment or not.
- The tooltip for the **Send Reminder** button in the **Forms** dialog box was updated to read, "Resend Forms that are Not Started."

Forms: Abbott, Ken

Resend Forms that are Not Started

Forms

ON-DEMAND FORM
SEND REMINDER

Form Name	Delivery	Sent Date	Status	Actions
Patient Registration Form	Automated	1/27/2026	IN PROGRESS	
Medical History Form	Automated	1/27/2026	COMPLETE	
Insurance Information	Automated	1/27/2026	NOT STARTED	

Dentrix 26.3

Overview and New Features

This Dentrix 26.3 Release Guide provides information about the Dentrix 26.3 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 26.3.

Note: For information about using the new features in Dentrix 26.3, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s new in Dentrix 26.3?” in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 26.3 includes the following enhancements:

THE REDESIGNED FAMILY FILE

At Henry Schein One, we’re redesigning the Family File to make it more intuitive and easier to use.

CLAIMS MANAGER

- The Claims Manager icon was redesigned to be more visible and distinctive in the Office Manager and Ledger toolbars. It also appears in the legacy Insurance Claim window and the taskbar when you minimize the Claims Manager.
- A tour of the redesigned Claims Manager is now available.

MISCELLANEOUS

- You can now enable surcharging in Dentrix Pay.
- In Dentrix Chat, you can now open hyperlinks sent through Chat.

Using the New Features and Enhancements

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

Opening the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. The cards in the redesigned Family File have now been rearranged to mirror the layout of the legacy Family File window.

Note: 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 open the redesigned Family File

1. From your desktop, double-click the Family File icon, and then from the **Select Patient** dialog box, select the desired patient.

The redesigned Family File appears.

Dentrix Family File - Davis, Karen [DA0003] New Family File LEAVE FEEDBACK

File Edit Help

Davis, Karen Patient FORM STATUS HEALTH HISTORY ?

Contact Information		Appointment Details		Patient Information			
Mobile Phone #	Home Phone #	First Visit	Last Visit	Chart #	Gender	Birthdate	Social Security #
-	(801)555-1530	08/06/2024	09/22/2025	DA0003	Female	06/17/1977, 48	000-00-0007
Email		Next Visit	Missed Appointments	Provider	Fee Schedule	DL #	HofH / Guarantor
-		-	1 Missed, 1 Broken	DDS1	<Prov Default>	-	Yes
Address				Ins. Subscriber	Position		
1768 N 150 W, Cisco, UT, 84515				Yes	Single		

Primary Dental Insurance				Continuing Care	
1 dental					
Company	Group Plan	Group #	Fee Schedule	02/13/2026	PROPHY
Equicor Cigna	Noble	18550	-	09/23/2026	BITEWINGS
Coverage	Used	Ded S/P/O	Met		
3500.00	0.00	25/0/0	0/0/0		
Other Coverage					
-					

Payment & Billing Information				Employer	
Payment Amount	Amount Past Due	Billing Type	Last Payment	Noble Finance	
-	-	1	0.00		
0 --> 30	31 --> 60	61 --> 90	91 -->	Balance	
1577.00	0.00	0.00	0.00	1577.00	

Notes SHOW NOTES

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

Emergency Contact			
Contact Name	Relationship	Phone #	
-	-	-	

Upcoming Appointments				Referrals			
				Referred	Referral Type	Individual or Source	Date of Referral
				By	Patient	Mr. Dean Little	08/06/2024

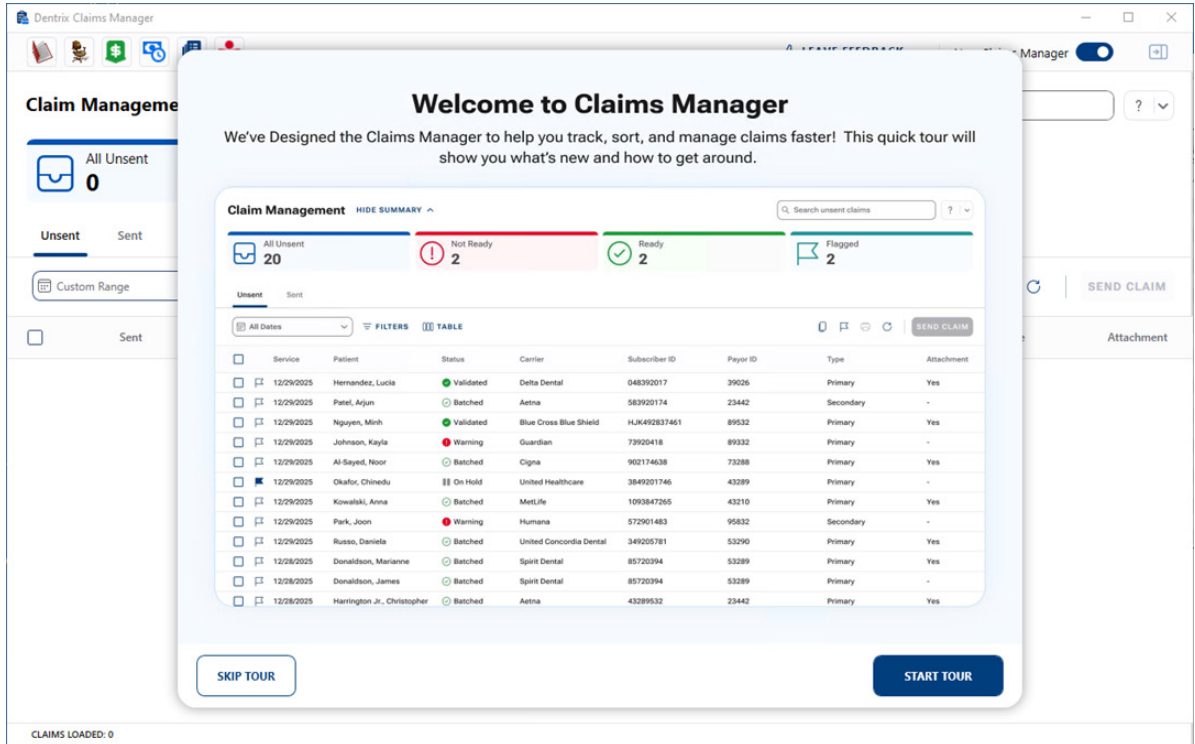
Claims Manager

At Henry Schein One, we've redesigned the Claims Manager window to make it more intuitive and easier to use.

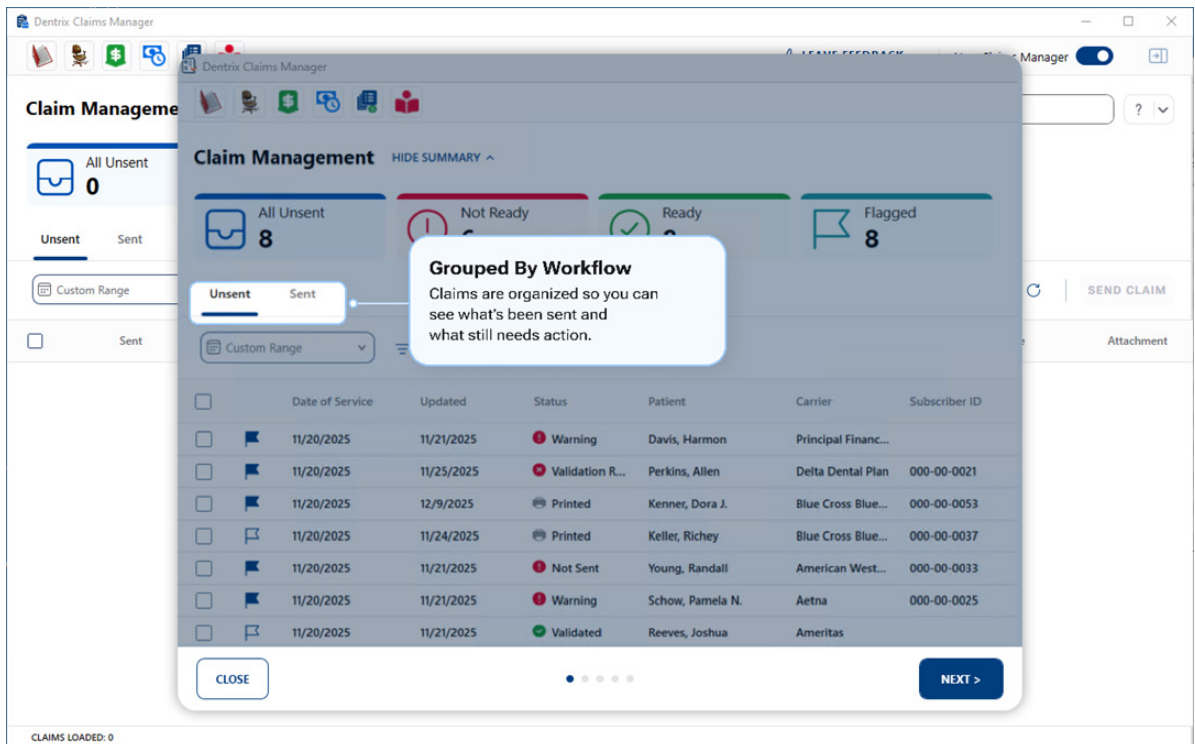
To open the Claims Manager

1. In the Ledger toolbar, click the Claims Manager icon .

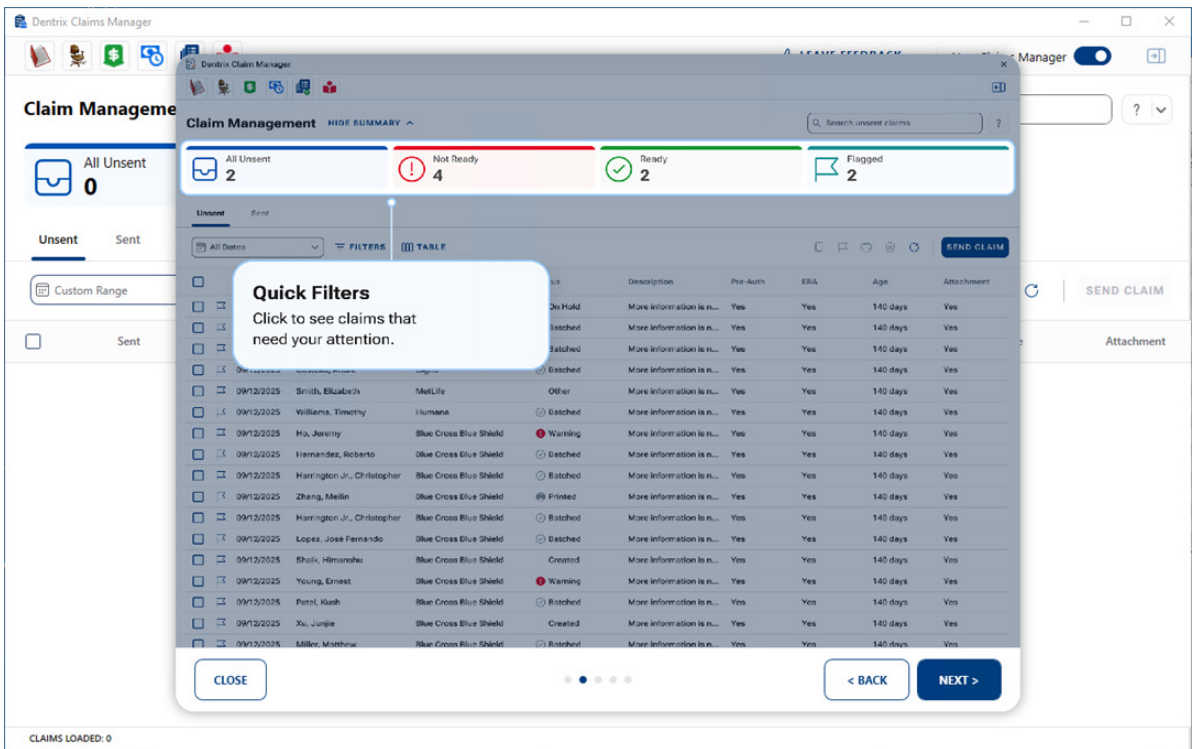
The Claims Manager window and the Claims Manager tour appear.



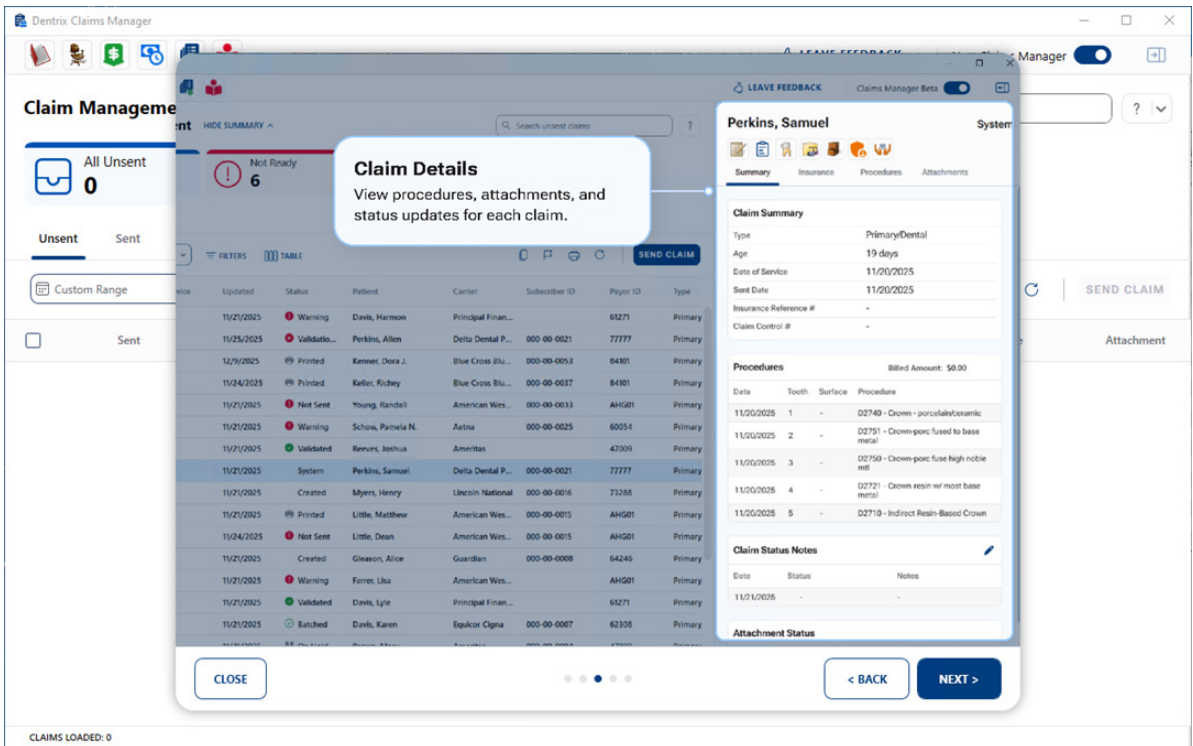
2. To view the tour, click **Start Tour**.



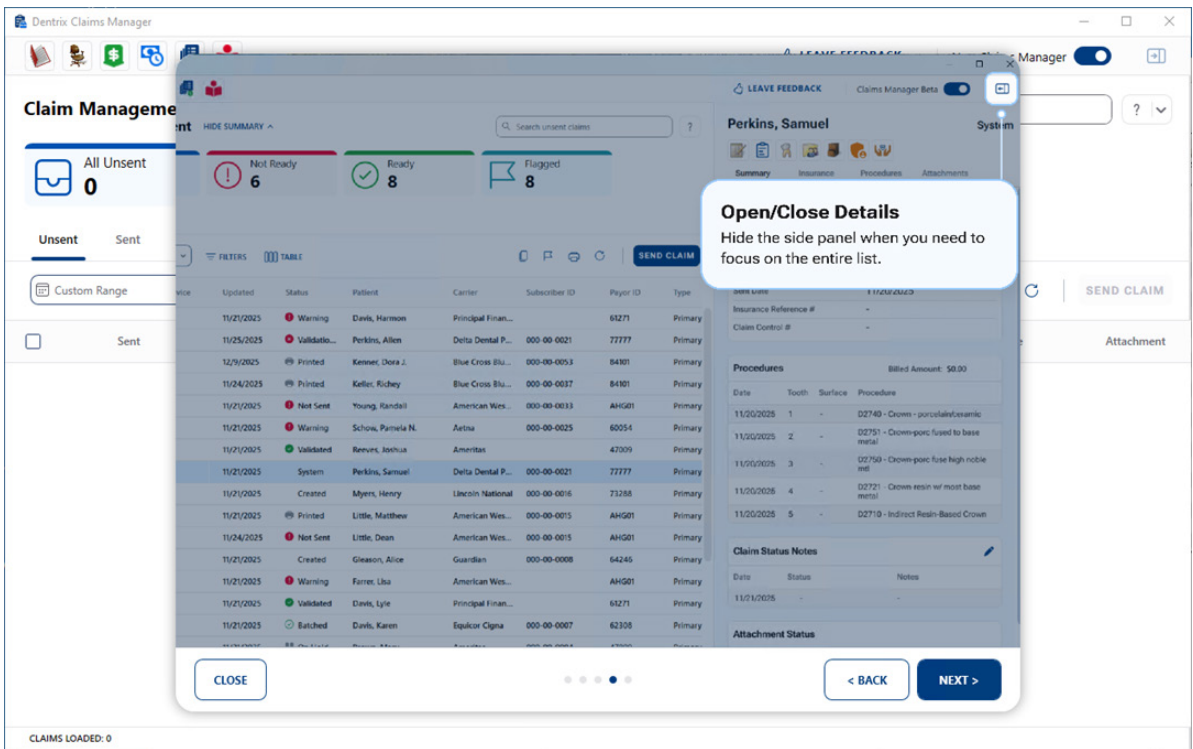
3. Click **Next**.



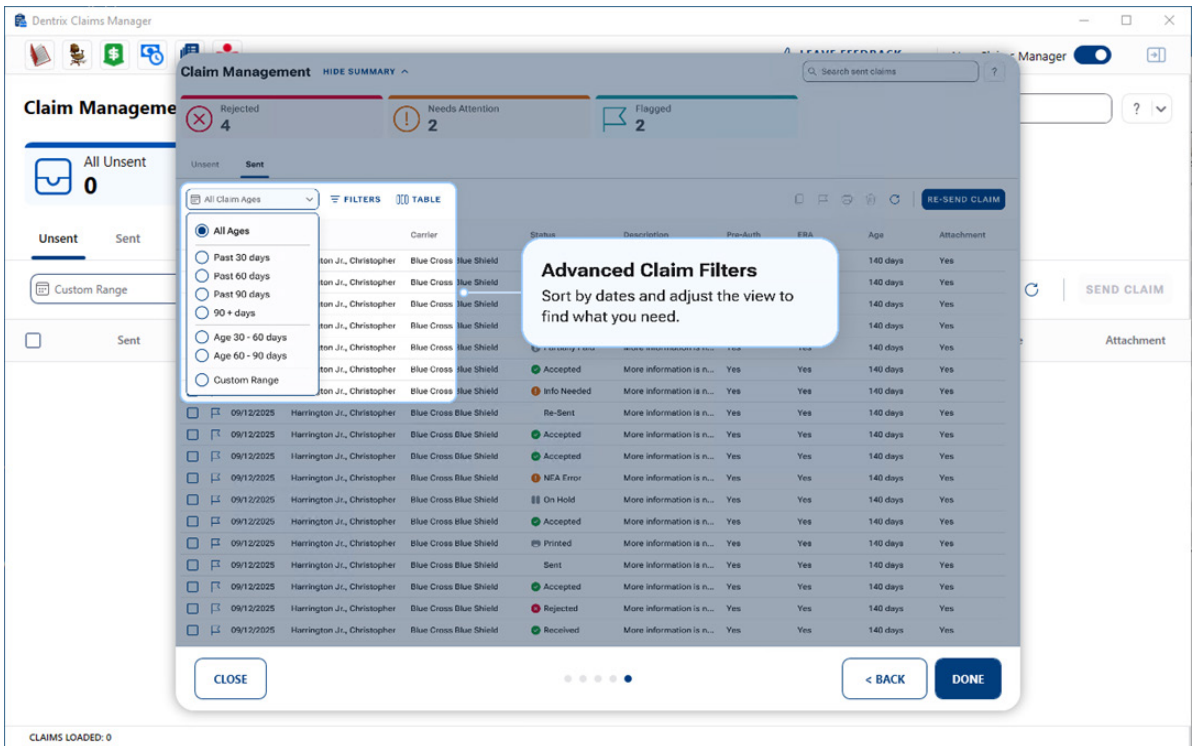
4. Click Next.



5. Click Next.



6. Click Next.



7. Click Done.
The Claims Manager appears.

Enabling Surcharging in Dentrix Pay

REQUIREMENTS

- Ingenico Lane 3600
- Dentrix 26.3 or higher

Note: Before enabling surcharging, you must notify both Worldpay and Mastercard using their required forms to ensure the Card Brands are properly informed, as each has specific timing rules that must be followed. Only after completing these notifications should you click the “Save Surcharge” button and then confirm “Yes” in the acknowledgement popup, which will configure Dentrix Pay and the payment device to allow surcharging.

Important: While Henry Schein One products facilitate surcharges, use of such products may be restricted by laws, rules, regulations, orders, directives, or other matters enacted, in force or effective by, for or with respect to any federal, state, local or other government, governing authority, agency or other body to which you may be subject. Where and when surcharging may be permitted, it may be subject to requirements, including customer notice and consent requirements, that are not addressed by or may conflict with the features of Henry Schein One products. By enabling surcharges and using the associated Dentrix features, you acknowledge and agree that you have independently reviewed applicable legal or other restrictions and requirements and you further acknowledge and agree that you remain solely responsible for determining whether and when you are permitted to surcharge, and for following any requirements associated with your choice to surcharge.

To enable surcharging in Dentrix Pay

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

The **Dentrix Pay Setup** dialog box appears.

The screenshot shows the 'Dentrix Pay Setup' dialog box with the 'Surcharging' tab selected. The dialog contains the following elements:

- Account and Device Settings | Ledger Posting Options | Features | **Surcharging**
- Text: "Before enabling surcharging, you must notify both Worldpay and Mastercard using their required forms to ensure the Card Brands are properly informed, as each has specific timing rules that must be followed. Only after completing these notifications should you click the 'Save Surcharge' button and then confirm 'Yes' in the acknowledgement popup, which will configure Dentrix Pay and the payment device to allow surcharging."
- Bullet point: "• You must fill out the Worldpay and Mastercard Forms found at the links below."
- Links: [Worldpay Surcharging Form](#) and [Mastercard Surcharging Form](#)
- Check box: "By checking this box you acknowledge that you have read, understood, and agree to the following:"
- Text: "While Henry Schein One products facilitate surcharges, use of such products may be restricted by laws, rules, regulations, orders, directives, or other matters enacted, in force or effective by, for or with respect to any federal, state, local or other government, governing authority, agency or other body to which you may be subject. Where and when surcharging may be permitted, it may be subject to requirements, including customer notice and consent requirements, that are not addressed by or may conflict with the features of Henry Schein One products. By enabling surcharges and using the associated Dentrix features, you acknowledge and agree that you have independently reviewed applicable legal or other restrictions and requirements and you further acknowledge and agree that you remain solely responsible for determining whether and when you are permitted to surcharge, and for following any requirements associated with your choice to surcharge."
- Input field: "Input Surcharge % between 2.0% and 3.0% : 0.0 %"
- Dropdown menu: "Charge Adjustment Type for Surcharge: Dentrix Pay Surcharge Fee"
- Link: [Additional Surcharge Information](#)
- Buttons: "Reset / Cancel" and "Save Surcharge"
- Footer: Worldpay logo, "* Required", "OK", and "Cancel"

2. Click the **Surcharging** tab.
3. Read the first paragraph, and then do the following:
 - Click the links: Worldpay Surcharging Form and Mastercard Surcharging Form.
 - Complete the forms.
4. After reading the second paragraph, select the check box above the paragraph to acknowledge that you have read, understood, and agree.
5. Set the surcharge percentage from 2.0% to 3.0%.
6. Click **Save Surcharge**.

Dentrix 26.2

Overview and New Features

This Dentrix 26.2 Release Guide provides information about the Dentrix 26.2 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 26.2.

Note: For information about using the new features in Dentrix 26.2, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s new in Dentrix 26.2?” in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 26.2 includes the following enhancements:

THE REDESIGNED FAMILY FILE

At Henry Schein One, we’re redesigning the Family File to make it more intuitive and easier to use.

THE REDESIGNED INSURANCE CLAIM AND PREAUTHORIZATION WINDOWS

The redesigned Insurance Claim and Preauthorization windows are now available to select Beta offices to view and try out. We invite your feedback.

- The **Itemize Payment** dialog box is now called the **Itemize By Procedure** dialog box. You can use the **Itemize By Procedure** dialog box to know which procedure you are entering itemized payments for.
- Procedures now remain highlighted in the Insurance Claim and Pre-authorization windows when you enter itemized payments or pre-estimates.

DENTRIX IMAGING

- The **Compare**, **Share**, **Delete**, **Reassign**, and **Retake** buttons in Dentrix Imaging have been redesigned to be more visible.
- You can now use a keyboard shortcut (X) to start acquiring intraoral X-rays in either advanced or simple acquisition mode.

MISCELLANEOUS

- You can now set a date range when you run the Family Ledger Report.
- A new Family Ledger Report was added to the Dentrix Reports window.

Using the New Features and Enhancements

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

Opening the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. The cards in the redesigned Family File have now been rearranged to mirror the layout of the legacy Family File window.

Note: 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 open the redesigned Family File

1. From your desktop, double-click the Family File icon, and then from the **Select Patient** dialog box, select the desired patient.

The redesigned Family File appears.

Dentrix Family File - Davis, Karen [DA0003] New Family File [LEAVE FEEDBACK](#)

File Edit Help

Davis, Karen Patient [FORM STATUS](#) [HEALTH HISTORY](#) ?

Contact Information		Appointment Details		Patient Information			
Mobile Phone #	Home Phone #	First Visit	Last Visit	Chart #	Gender	Birthdate	Social Security #
-	(801)555-1530	08/06/2024	09/22/2025	DA0003	Female	06/17/1977, 48	000-00-0007
Email	-	Next Visit	Missed Appointments	Provider	Fee Schedule	DL #	HofH / Guarantor
-	-	-	1 Missed, 1 Broken	DDS1	<Prov Default>	-	Yes
Address	1768 N 150 W, Cisco, UT, 84515			Ins. Subscriber	Position	Yes	
1 dental				Continuing Care			
Company	Group Plan	Group #	Fee Schedule	02/13/2026 PROPHY			
Equicor Cigna	Noble	18550	-	09/23/2026 BITEWINGS			
Coverage	Used	Ded S/P/O	Met				
3500.00	0.00	25/0/0	0/0/0				
Other Coverage	-						
Payment & Billing Information				Employer			
Payment Amount	Amount Past Due	Billing Type	Last Payment	Noble Finance			
-	-	1	0.00				
0 --> 30	31 --> 60	61 --> 90	91 -->				
1577.00	0.00	0.00	0.00	Balance 1577.00			
Notes				Emergency Contact			
Notes are Hidden Click "Show Notes" to see any notes on file.				Contact Name	Relationship	Phone #	
				-	-	-	
Upcoming Appointments				Referrals			
				Referred	Referral Type	Individual or Source	Date of Referral
				By	Patient	Mr. Dean Little	08/06/2024

Entering Itemized Payments in the Redesigned Insurance Claim Window

At Henry Schein One, we've redesigned the Insurance Claim window to make it more intuitive and easier to use. If you are participating in the Beta, you can preview the proposed changes.

Note: These changes also apply to the Medical Insurance Claim and Preauthorization windows.

To enter itemized payments in the redesigned Insurance Claim window

1. In the Ledger, open an insurance claim.

The legacy Insurance Claim window appears.

Primary Dental Insurance Claim (11/12/2025) Batched
✕

File
Create Secondary
Create Medical
Enter Payment
Remarks
Submit
Benefits/Cov
Help

Try the New Claim Window
You can switch back anytime if it's not the right fit.

Try the New Claim Window

Patient: Young, Bridgette	Carrier: American Western Life
Subscriber: Young, Randall	Group Plan: Central City Clinic
Employer: Central City Clinic	(Release of Info/Assign of Benefits) (Secondary Insurance)
eClaims Ready: (eClaims is not set up)	

Billing Provider: Smith, Dennis	Claim Information: Standard
Rendering Provider: Smith, Dennis	Diagnostic Codes:
Pay-To Provider: Smith, Dennis	

Tooth	Surface	Description	Date	Code	Fee	Ins Paid
		Periodic oral evaluation	11/12/2025	D0120	46.00	0.00
		Prophylaxis-adult	11/12/2025	D1110	95.00	0.00

Total Billed:	131.00	Pmt Date	Pmt Amt	Description	Prov
Est Ins Portion:	131.00				
Itemized Total:	0.00				
Total Paid:	0.00				
Total Credit Adj:	0.00				
Total Chrg Adj:	0.00				
Ded S/P/O:	0/0/0	Adj Date	Adj Amt	Type	Prov

Create: 11/12/2025	Sent: 11/12/2025	Insurance Plan Note
Partial Payment:		This is a test note.
Claim Status		
Add/Edit Status		
11/12/2025	Batched	Remarks for Unusual Services
11/12/2025	Created	
		(No Note)

2. Click the Try the New Claim Window toggle.

The redesigned Insurance Claim window appears, and if there are issues with the claim a banner appears.

Young, Bridgette A - Primary Dental Insurance Claim (1/27/2026) Created New Claim Window LEAVE FEEDBACK X

Young, Bridgette Primary + SECONDARY PLAN DETAILS ENTER PAYMENT SUBMIT ?

⚠ This claim has issues that need your review before submitting. Review issues to see all required and recommended fixes. REVIEW ISSUES

Primary Insurance						
Subscriber	Employer	Carrier	Group Plan	Payor ID	<input checked="" type="checkbox"/> Release of Info <input checked="" type="checkbox"/> Assignment of Benefits	
Young, Randall	Central City Clinic	American Western Life	Central City Clinic			
Billing Provider	Rendering Provider	Pay-To-Provider	Claim Information			
Smith, Dennis	Smith, Dennis	Smith, Dennis	Standard			
Procedures						
Tooth	Surface	Description	Procedure Date	Code	Fee	Ins. Paid
		Intraoral Occlusal Image	01/27/2026	D0240	\$40.00	\$0.00
		Intraoral Occlusal Image	01/27/2026	D0240	\$40.00	\$0.00
		Bitewing Two Image	01/27/2026	D0272	\$42.00	\$0.00
Attachments			Diagnostic Codes			
When an attachment is added, it will appear here.			When a diagnostic code is added, it will appear here.			
Payments			Claim Financial Summary			
When a payment is made, it will appear here.			Total Billed	\$122.00		
			Est. Ins. Portion	\$122.00		
			Itemized Total	\$0.00		
			Total Paid	\$0.00		
			Total Credit Adj.	\$0.00		
			Total Charge Adj.	\$0.00		
			Ded S/P/O:	0/0/0		
Claim Status			Insurance Plan Note			
Created	Sent	Partial Payment	This is a test note.			
01/27/2026						
Date	Claim Status		Remarks For Unusual Services			
01/27/2026	Created		Click to add a remark.			

- To make itemized payments, click **Enter Payment**, and then click **Itemize By Procedure**. The **Itemize By Procedure** dialog box appears. In the **Procedures** card, the first procedure is selected.

Young, Bridgette A - Primary Dental Insurance Claim (1/27/2026) Created New Claim Window LEAVE FEEDBACK

Young, Bridgette Primary + SECONDARY PLAN DETAILS ENTER PAYMENT SUBMIT ?

! This claim has issues that need your review before submitting. Review issues to see all required and recommended fixes. REVIEW ISSUES

Primary Insurance		Carrier	Group Plan	Payor ID	
Subscriber	Employer				<input checked="" type="checkbox"/> Release of Info
Young, Randall	Central City O				<input checked="" type="checkbox"/> Assignment of Benefits

Billing Provider		Rendering Pr			
Smith, Dennis	Smith, Dennis				

Procedures			Fee	Ins. Paid
Tooth	Surface	Description		
		Intraoral Occl	\$40.00	\$0.00
		Intraoral Occl	\$40.00	\$0.00
		Bitewing Two	\$42.00	\$0.00

Itemize By Procedure (1 of 3)

Procedure
Intraoral Occlusal Image

Tooth	Surface	Procedure Code
		D0240

Amount Paid

Payment Table

Allowed Amount

Attachments		
		When an attachment is added, it will appear here.

Payments		
		When a payment is made, it will appear here.

Adjustments		
		When an adjustment is made, it will appear here.

Claim Status		Insurance Plan Note
Created	Sent	Partial Payment
01/27/2026		This is a test note.
Date	Claim Status	
01/27/2026	Created	

Remarks For Unusual Services
Click to add a remark.

- To pay the amount under **Amount Paid** and enter a payment for the next procedure, click **Save & Next**.

The next procedure in the **Procedures** card is selected and the payment amount for that procedure appears in the **Itemize By Procedure** dialog box.

- Continue to advance through the payment list until a payment has been entered for each procedure, and then click **Save & Finish**.

The **Total Insurance Payment** dialog box appears.

Young, Bridgette A - Primary Dental Insurance Claim (1/27/2026) Created New Claim Window LEAVE FEEDBACK

Young, Bridgette Primary + SECONDARY PLAN DETAILS ENTER PAYMENT SUBMIT ?

⚠ This claim has issues that need your review before submitting. Review issues to see all required and recommended fixes. REVIEW ISSUES

Primary Insurance

Subscriber	Employer	Carrier	Group Plan	Payor ID	<input checked="" type="checkbox"/> Release of Info
Young, Randall	Central City Clinic	American Western Life	Central City Clinic		<input checked="" type="checkbox"/> Assignment of Benefits

Billing Provider
Smith, Dennis

Procedures

Tooth	Surface	Ins. Paid
		00 \$40.00
		00 \$40.00
		00 \$42.00

Attachments

When an				
---------	--	--	--	--

Payments

When			
------	--	--	--

Adjustments

When an adjustment is made, it will appear here.

Claim Status

Created	Sent	Partial Payment
01/27/2026		
Date	Claim Status	
01/27/2026	Created	

Insurance Plan Note
This is a test note.

Remarks For Unusual Services
Click to add a remark.

Total Insurance Payment

Enter Insurance Payment
Date: 02/02/2026

Payment Type: Check Payment
Check #:
Bank/Branch #:

Provider Amounts
Calculate according to:
 Family Balance Patient Balance

Prov	Itemized	Balance - Amt Paid = New Bal
DDS1	122.00	253.00 122.00 131.00

Payment Total: 122.00

Deductible Applied For Claim
Standard: 0.00 Preventive: 0.00 Other: 0.00

Claim Totals
PreAuth Number:
Coverage Amount: 122.00
Total Amount Billed: 122.00
Itemized Total: 122.00
Total Amount Paid: 122.00

Enter Adjustment
None \$ % Type:
Total Amount:
 Split Adjustment by Provider

Claim is partially paid

6. Select the **Payment Type**, enter any other necessary information, and then click **OK/Post**.
If the patient has secondary insurance, a message appears.
7. To create a secondary claim, click **Yes**.
8. To view the secondary claim, click the **Secondary** tab.
9. To submit the claim, click **Submit**.



Running the Family Ledger Report




You can now set a date range when you run the Family Ledger Report, and this report now appears in the Dentrix Reports window.


To run the Family Ledger Report

1. Open the Ledger, click **Print**, and then click **Family Ledger (Dentrix Reports)**.
The **Family Ledger** dialog box appears.

Family Ledger

Options:
 Default[Modified]  

Select Date
 Range 11/01/2025  - 02/02/2026 
 Current day 

Select Patient
 Young, Bridgette A 

List Individual Patient Balances of Family

Save Options OK Cancel

- Under **Select Date**, set a date range for the report, and then click **OK**.
The Dentrix Reports window appears.

Dentrix Reports

Search

Reports
 Accounts Receivable Trends Report
 Adjustment Summary
 Continuing Care Statistics
 Daily Provider Transactions Report
 Family Ledger
 Insurance Payment Summary
 Insurance Transaction Analysis
 New Patient Summary
 Patient Payments
 Payment Summary
 Practice Goals Analysis
 Practice Treatment Case Status Totals
 Procedure Summary
 Provider Aging Report
 Referral Analysis
 Schedule Summary Report
 Scheduled Production Forecast

Date	Teeth	Description	Patient	Charge	Payment	Balance
10/31/2025		Balance Forward			-15,000.00	-15,000.00
11/12/2025		Periodic oral evaluation	Bridgette	46.00		-14,954.00
11/12/2025		Prophylaxis adult	Bridgette	85.00		-14,869.00
01/27/2026		Intraoral Occlusal Image	Bridgette	40.00		-14,829.00
01/27/2026		Intraoral Occlusal Image	Bridgette	40.00		-14,789.00
01/27/2026		Bitewing Two Image	Bridgette	42.00		-14,747.00
02/02/2026		Dental Ins Payment - American Western Life	Bridgette		-122.00	-14,869.00
Total Family Balance as of 02/02/2026						-14,869.00
YTD Finance Charges:						0.00
YTD Late Charges:						0.00
YTD Family Payments:						0.00
YTD Insurance Payments:						122.00

Single Family Ledger Dentrix Dental Practice
1220 South 630 East #100
American Fork, UT 84003

Family Ledger for 11/01/2025 - 02/02/2026

Guarantor Name: Bridgette A Young Chart Number: YC0001
 608 S 500 W Billing Type: 4
 Apt. 101
 Clisco, UT 84515

Dentrix Imaging

The Compare, Share, Delete, Reassign, and Retake buttons in Dentrix Imaging have been redesigned to be more visible.



Dentrix 26.1

Overview and New Features

This Dentrix 26.1 Release Guide provides information about the Dentrix 26.1 software release. The overview section includes important notes regarding the release, followed by a brief description of the new features and enhancements available in Dentrix 26.1.

Note: For information about using the new features in Dentrix 26.1, refer to “Using the New Features and Enhancements” in this section of the Release Guide or “What’s new in Dentrix 26.1?” in the Dentrix Help. For information on installing Dentrix, refer to the Installation Guide.

New Features

Dentrix 26.1 includes the following enhancements:

THE REDESIGNED FAMILY FILE

- A Help menu was added allowing you to view the Help, connect to the Resource Center, leave feedback, or submit ideas for improving Dentrix.

THE REDESIGNED INSURANCE CLAIM AND PREAUTHORIZATION WINDOWS

- The redesigned Insurance Claim and Preauthorization windows are now available to select Beta offices to view and try out. We invite your feedback.

MISCELLANEOUS

- If you have enabled Dentrix Pay, the **Dentrix Pay** option appears after **Post/Set Complete** in the appointment block menu when you right-click the appointment block.
- In Health History, whenever an error occurs, the **Save Signature** button is disabled in the **Capture Patient’s Signature** and the **Capture Provider’s Signature** dialog boxes.
- When a patient adds or sets an employer (including address and phone number) in Forms, that information is assigned to that patient’s record in the Dentrix database.
- A disclaimer was added to the Eligibility Pro Response Report stating that the report is for informational purposes only. The information contained in the report is derived from the indicated insurance and is not construed as a guarantee of payment. Inquiries should be directed to the insurance company.
- Tool tips were added to the single-letter icons in the **Progress Notes** panel in the Patient Chart.
- By default, the **Imaging** panel appears automatically whenever you open the Patient Chart.
- The text of the message that appears when you click **No** in the **Claims Attachment** dialog box was updated.
- The Edit icon (pencil) in the **Claim Status Notes** dialog box is now enabled.

Using the New Features and Enhancements

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

Opening the Redesigned Family File

At Henry Schein One, we're redesigning the Family File to make it more intuitive and easier to use. The cards in the redesigned Family File have now been rearranged to mirror the layout of the legacy Family File window.

Note: 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 open the redesigned Family File

1. From your desktop, double-click the Family File icon, and then from the **Select Patient** dialog box, select the desired patient.

The redesigned Family File appears.

Dentrix Family File - Davis, Karen [DA0003] New Family File LEAVE FEEDBACK

File Edit Help

Davis, Karen Patient FORM STATUS HEALTH HISTORY ?

Contact Information		Appointment Details		Patient Information			
Mobile Phone #	Home Phone #	First Visit	Last Visit	Chart #	Gender	Birthdate	Social Security #
-	(801)555-1530	08/06/2024	09/22/2025	DA0003	Female	06/17/1977, 48	000-00-0007
Email		Next Visit	Missed Appointments	Provider	Fee Schedule	DL #	HofH / Guarantor
-		-	1 Missed, 1 Broken	DDS1	<Prov Default>	-	Yes
Address				Ins. Subscriber	Position		
1768 N 150 W, Cisco, UT, 84515				Yes	Single		

Primary Dental Insurance				Continuing Care	
1 dental					
Company	Group Plan	Group #	Fee Schedule	02/13/2026	PROPHY
Equicor Cigna	Noble	18550	-	09/23/2026	BITEWINGS
Coverage	Used	Ded S/P/O	Met		
3500.00	0.00	25/0/0	0/0/0		
Other Coverage					
-					

Payment & Billing Information				Employer	
Payment Amount	Amount Past Due	Billing Type	Last Payment	Noble Finance	
-	-	1	0.00		
0 --> 30	31 --> 60	61 --> 90	91 -->	Balance	
1577.00	0.00	0.00	0.00	1577.00	

Notes SHOW NOTES

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

Emergency Contact			
Contact Name	Relationship	Phone #	
-	-	-	

Upcoming Appointments				Referrals			
				Referred	Referral Type	Individual or Source	Date of Referral
				By	Patient	Mr. Dean Little	08/06/2024

2. Click the Down arrow next to the Help icon.
A menu appears.

Dentrix Family File - Davis, Karen [DA0003] New Family File LEAVE FEEDBACK

File Edit Help

Davis, Karen Patient FORM STATUS HEALTH HISTORY ? ^

Contact Information		Appointment Details		Patient Information		
Mobile Phone #	Home Phone #	First Visit	Last Visit	Chart #	Gender	Birthdate
-	(801)555-1530	08/06/2024	09/22/2025	DA0003	Female	06/17/1977, 48
Email		Next Visit	Missed Appointments	Provider	Fee Schedule	DL #
-		-	1 Missed, 1 Broken	DDS1	<Prov Default>	-

HELP DOCS
RESOURCE CENTER
LEAVE FEEDBACK
SUBMIT AN IDEA

3. Click the desired option.

Previewing the Redesigned Insurance Claim Window

At Henry Schein One, we've redesigned the Insurance Claim window to make it more intuitive and easier to use. If you are participating in the Beta, you can preview the proposed changes.

To preview the redesigned Insurance Claim window

1. In the Ledger, open an insurance claim.
The legacy Insurance Claim window appears.

Primary Dental Insurance Claim (11/12/2025) Batched

File Create Secondary Create Medical Enter Payment Remarks Submit Benefits/Cov Help

Try the New Claim Window
You can switch back anytime if it's not the right fit.

Try the New Claim Window

Patient: Young, Bridgette
Subscriber: Young, Randall
Employer: Central City Clinic

Carrier: American Western Life
Group Plan: Central City Clinic
(Release of Info/Assign of Benefits) (Secondary Insurance)
eClaims Ready: (eClaims is not set up)

Billing Provider: Smith, Dennis
Rendering Provider: Smith, Dennis
Pay-To Provider: Smith, Dennis

Claim Information: Standard
Diagnostic Codes:

Tooth	Surface	Description	Date	Code	Fee	Ins Paid
		Periodic oral evaluation	11/12/2025	D0120	46.00	0.00
		Prophylaxis-adult	11/12/2025	D1110	85.00	0.00

Total Billed:	Est Ins Portion:	Itemized Total:	Total Paid:	Total Credit Adj:	Total Chrg Adj:	Ded S/P/O:
131.00	131.00	0.00	0.00	0.00	0.00	0/0/0

Pmt Date	Pmt Amt	Description	Prov

Adj Date	Adj Amt	Type	Prov

Create: 11/12/2025 Sent: 11/12/2025
Partial Payment:

Insurance Plan Note
This is a test note.

Claim Status Add/Edit Status

Date	Status
11/12/2025	Batched
11/12/2025	Created

Remarks for Unusual Services
[No Note]

2. Click the Try the New Claim Window toggle.

The redesigned Insurance Claim window appears, and if there are issues with the claim a banner appears.

Davis, Karen - Primary Dental Insurance Claim (1/19/2026) Created
New Claim Window
LEAVE FEEDBACK
×

Davis, Karen
Primary
PLAN DETAILS
ENTER PAYMENT
🔄
🔄
🗑️
SUBMIT
?

! This claim has issues that need your review before submitting. Review issues to see all required and recommended fixes. REVIEW ISSUES

Primary Insurance																				
Subscriber	Employer	Carrier	Group Plan	Payor ID	✔ Release of Info ✔ Assignment of Benefits															
Davis, Karen	Noble Finance	Equicor Cigna	Noble	62308																
Billing Provider	Rendering Provider	Pay-To-Provider	Claim Information																	
Smith, Dennis	Smith, Dennis	Smith, Dennis	Standard !																	
Procedures																				
Tooth	Surface	Description	Procedure Date	Code	Fee	Ins. Paid														
1		Extract, erupted th, rem oth	08/28/2025	D7210	\$255.00	\$0.00														
Attachments			Diagnostic Codes																	
When an attachment is added, it will appear here.			When a diagnostic code is added, it will appear here.																	
Payments			Claim Financial Summary																	
When a payment is made, it will appear here.			<table style="width: 100%; border-collapse: collapse;"> <tr> <td>Total Billed</td> <td style="text-align: right;">\$255.00</td> </tr> <tr> <td>Est. Ins. Portion</td> <td style="text-align: right;">\$184.00</td> </tr> <tr> <td>Itemized Total</td> <td style="text-align: right;">\$0.00</td> </tr> <tr> <td>Total Paid</td> <td style="text-align: right;">\$0.00</td> </tr> <tr> <td>Total Credit Adj.</td> <td style="text-align: right;">\$0.00</td> </tr> <tr> <td>Total Charge Adj.</td> <td style="text-align: right;">\$0.00</td> </tr> <tr> <td>Ded S/P/O:</td> <td style="text-align: right;">0/0/0</td> </tr> </table>				Total Billed	\$255.00	Est. Ins. Portion	\$184.00	Itemized Total	\$0.00	Total Paid	\$0.00	Total Credit Adj.	\$0.00	Total Charge Adj.	\$0.00	Ded S/P/O:	0/0/0
Total Billed	\$255.00																			
Est. Ins. Portion	\$184.00																			
Itemized Total	\$0.00																			
Total Paid	\$0.00																			
Total Credit Adj.	\$0.00																			
Total Charge Adj.	\$0.00																			
Ded S/P/O:	0/0/0																			
Adjustments			Insurance Plan Note																	
When an adjustment is made, it will appear here.			Click to add a note.																	
Claim Status			Remarks For Unusual Services																	
Created	Sent	Partial Payment	Click to add a remark.																	
01/19/2026																				
Date	Claim Status																			
01/19/2026	Created																			

3. Click Review Issues.

The Claim Readiness dialog box appears.



Davis, Karen - Primary Dental Insurance Claim (1/19/2026) Created ×

Claim Readiness

Please review and resolve these issues before submitting the claim.

- **Required** issues must be fixed or the claim will be rejected.
- **Recommended** issues won't block submission but may cause delays or denials.

1 issues were found - 1 Required, 0 Recommended

Category	Issue	Severity	Fix Issue(s)
BILLING PROVIDER (1) 			
Billing Provider	Missing Billing Provider NPI	 Required	

4. To address the issue, click the Wrench icon.

A dialog box related to the issue appears. In this example, the **Provider Information** dialog box appears because the billing provider's NPI is missing.

Provider Information

Last: Smith First: Dennis MI: Suffix: Electronic Rx User

ID: DDS1 Title: D.D.S. Non-Person Fee Schedule: 1. Office >...

Specialty: Dentist SS#: 111-11-1111

Street: DDS1_1220 South 630 East StateID#: DDS1_StateID State:

Suite #500 State License Expiration:

City: American Fork ST: UT Zip: 84003 TIN#: DDS1_TIN

Phone: (801)555-4121 Egt: Medicaid#: DDS1_Medicaid

E-Mail: DEA#: DDS1_DrugID

DEA License Expiration:

DEA Schedule: II III IV V

Assigned Operatorios: 1 OP-1 2 OP-2 3 OP-3 Class: Primary Secondary

Provider ID Setup: NPI:

Blue Cross ID#: DDS1_BlueCross Blue Shield ID#:

Provider#: DDS1_Provider Office#: DDS1_Office

Medicare#: DDS1_Medicare

Other ID#: DDS1_OtherID

UPIN#:

Controlled Substance#:

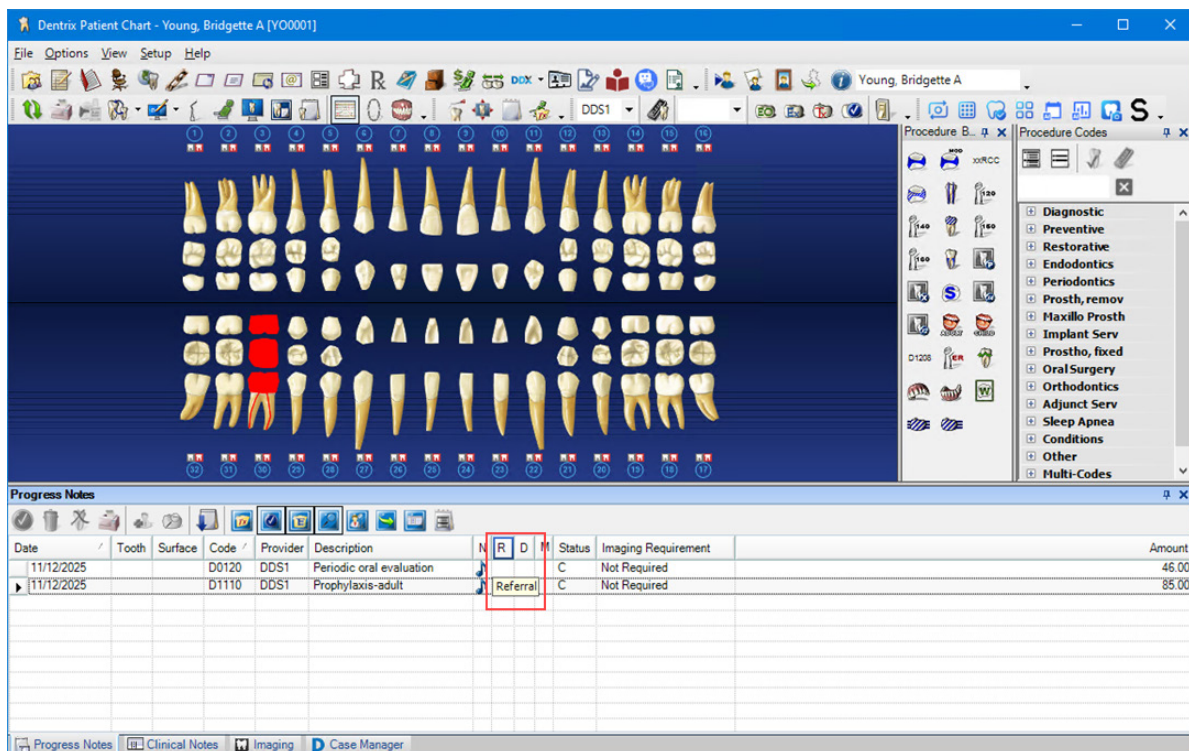
Insurance Claim Options: Print Provider's Signature Using: "Signature On File" Provider's Name Locum Tenens Treating Provider: 1

OK Cancel

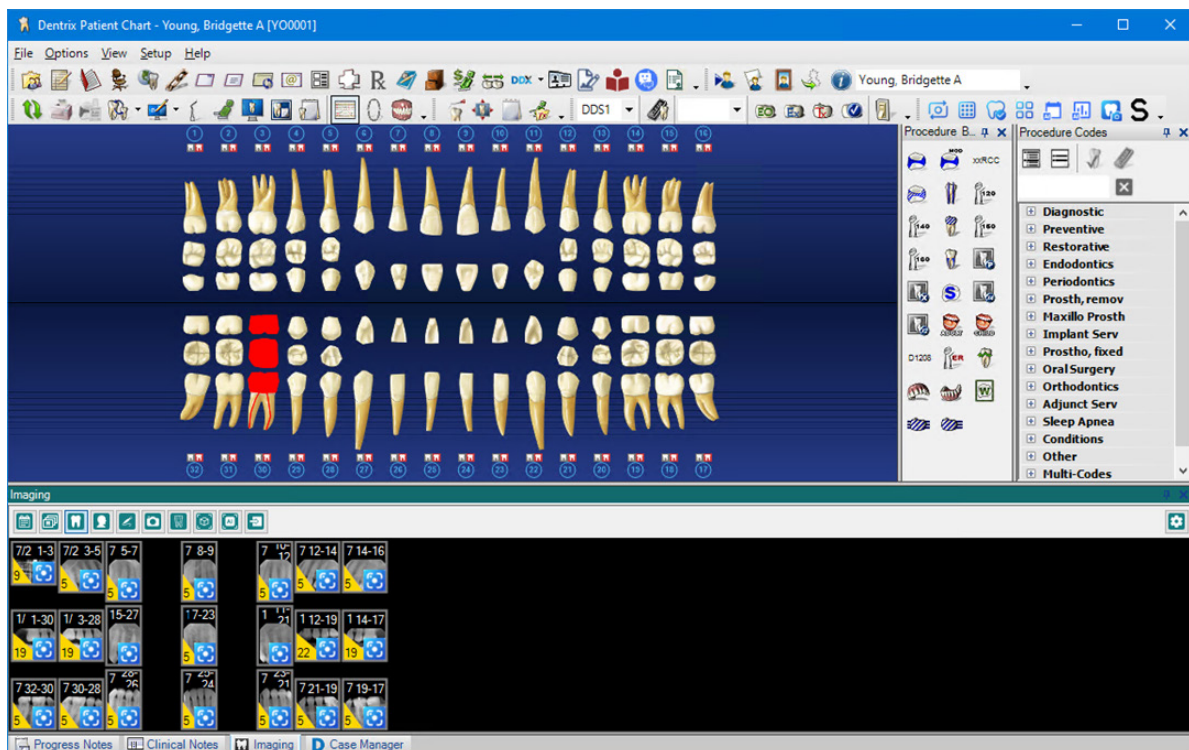
- Supply the needed information, and then click **OK**.
Once all issues are resolved, you can submit the claim.

Patient Chart

Tool tips were added to the single-letter icons in the **Progress Notes** panel in the Patient Chart.



By default, the Imaging panel appears automatically whenever you open the Patient Chart.



Health History

Whenever an error occurs, the **Save Signature** button is disabled in the **Capture Patient's Signature** and the **Capture Provider's Signature** dialog boxes.

1. Open Health History.

2. Click Patient's Signature.

Capture Patient's Signature

Please scan the QR code below to sign and click 'Patient Has Signed' when done.

Note: The signature may take up to 15 minutes to appear on the patient's form in the Document Center.



3. Click Provider's Signature.
The Provider's Signature dialog box appears.


✖ Could Not Save Signature.
No documents found that need to be signed

Capture Provider's Signature

Name of Provider

Practice DentrixDental (DR99)

Please sign below:



Save Signature for future Use

Forms: Abbott, Ken ✕

Send On-Demand Form

Use On-Demand forms to send patients a form outside your regular automation flow. For forms you send frequently, set them up in your [Form Builder](#) for automatic delivery.

Select Form

2 Selected

Choose how to deliver this form:


Send to Patient

Form will be sent by text and/or email.

SEND FORM

Scan QR Code

If the patient is nearby, scan this code with their phone or a tablet to complete the form now — no need to send.



OR

DONE

Eligibility Disclaimer

A disclaimer was added to the Eligibility Pro Response Report.

✔ Eligible
Use **Ctrl + F** to Search & Filter

Jonathan Vandaveer

Dentrix Eligibility

Created: November 5, 2025 at 11:37 AM
Transaction ID: cmhm5vizf479cgk0ieflr8x35

Response Type **Source** **Insurance**

✔ Eligibility Pro

✔ Eligibility Essentials

Payer Web Portal

MetLife

Eligibility Pro delivers current, web-based eligibility checks with greater detail and accuracy, helping reduce errors and improve efficiency. **Eligibility Essentials** uses EDI (Electronic Data Interchange) methods that provide a more basic level of eligibility information, which may not always reflect the payer's most up-to-date data.

Disclaimer: This eligibility report is for **informational purposes only**. The information is derived from the insurance indicated on the report and is not to be construed as a guarantee of payment. Inquires regarding the accuracy of its content should be directed to the insurance company directly.

Appointment Coverage Details

Patient has no upcoming appointments scheduled.

Patient		Deductibles and Maximums ✔ Deductible Met ❌ Max Reached		
<small>First Name</small> Jonathan	<small>Last Name</small> Vandaveer	<small>Deductible</small>	<small>Category</small>	<small>IN NETWORK</small>
<small>Date of Birth</small> --		Individual		
		<small>Lifetime Amount</small>	<small>Dental Care</small>	\$3,600
		<small>Lifetime Remaining</small>	<small>Dental Care</small>	\$3,600
Subscriber				
<small>First Name</small> Jeffrey	<small>Last Name</small> Vandaveer	<small>Maximum</small>	<small>Category</small>	<small>IN NETWORK</small>