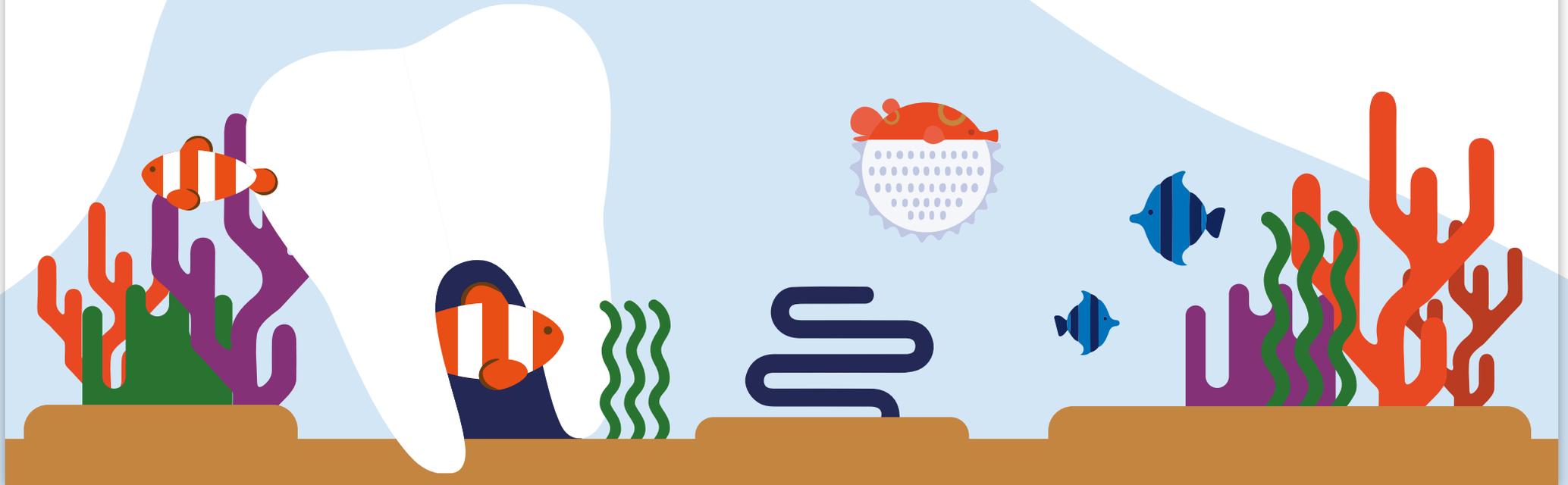




Denticon - Basic Clerical

How to Add, Change and Remove Existing Insurance Plans



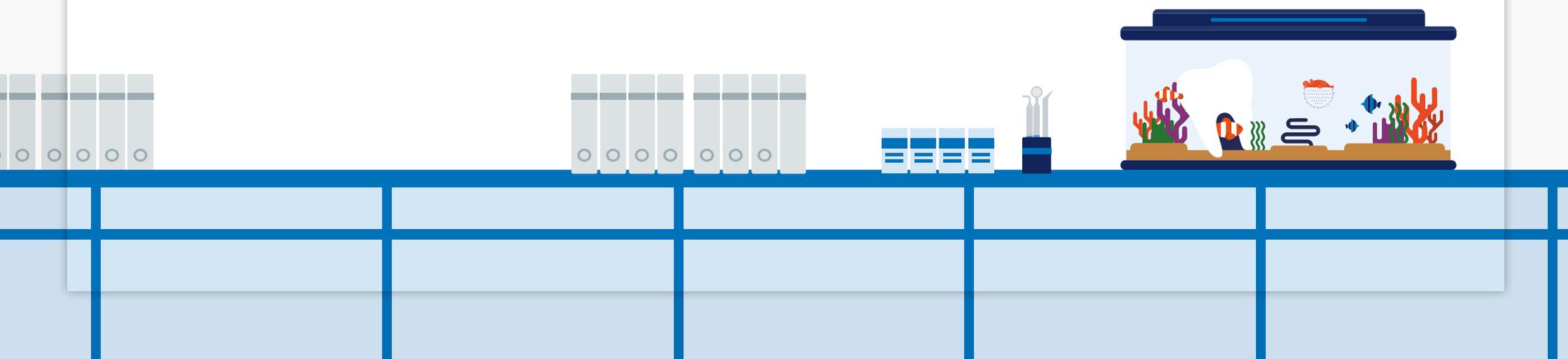
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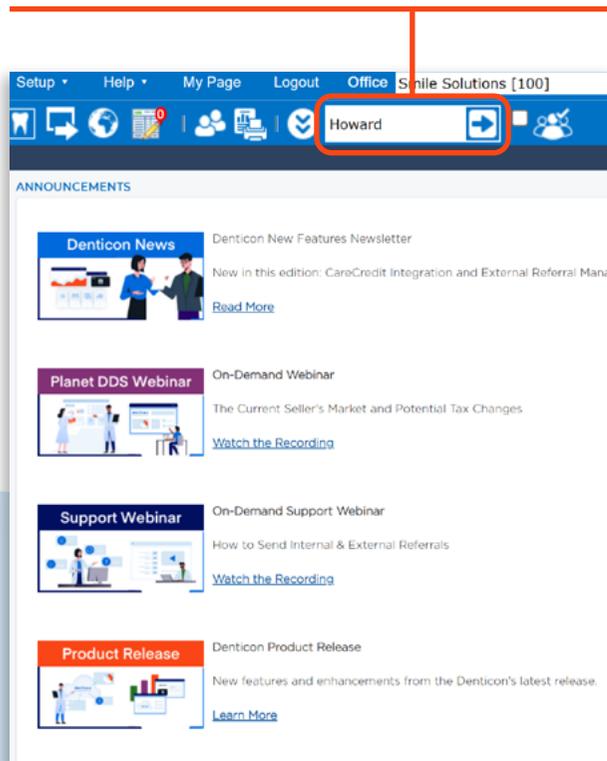
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Add Insurance to a Patient Record

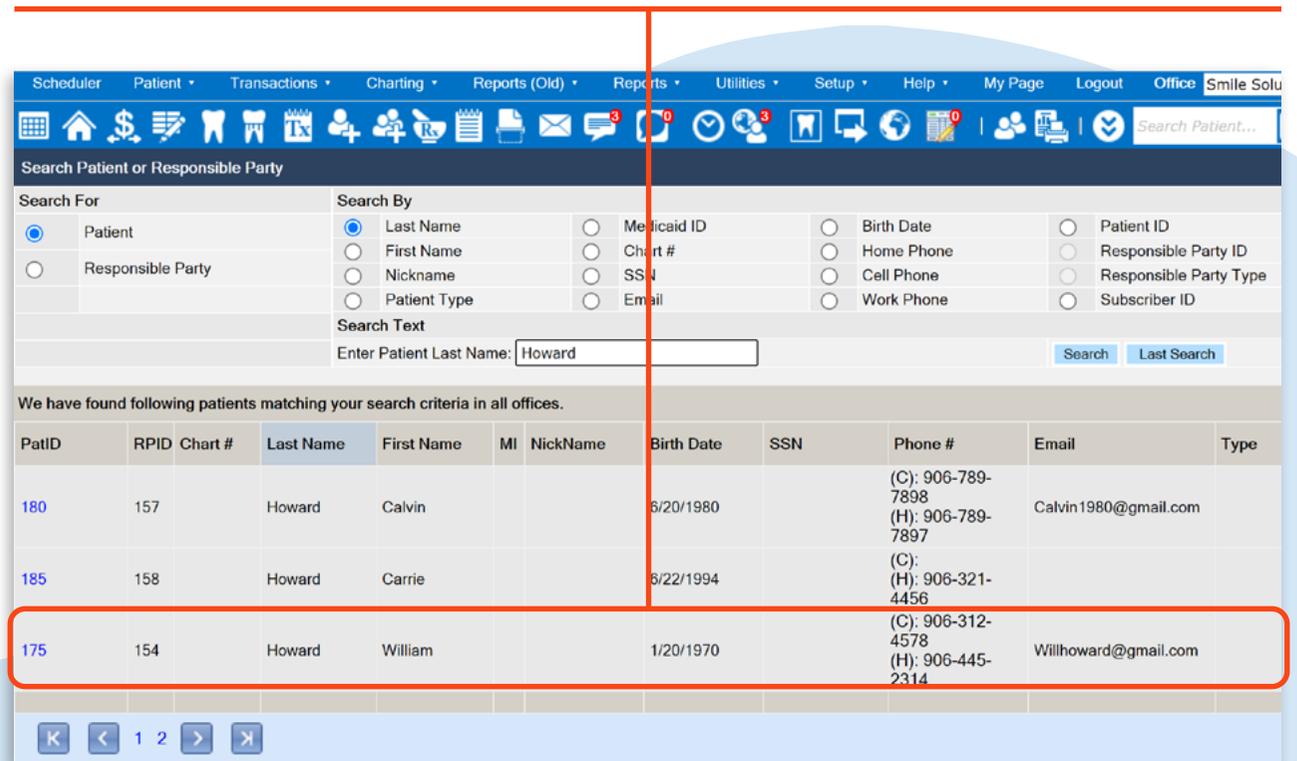
Step 1

To locate a patient file, type their last name into the 'Search Patient' field and click the **arrow**.



Step 2

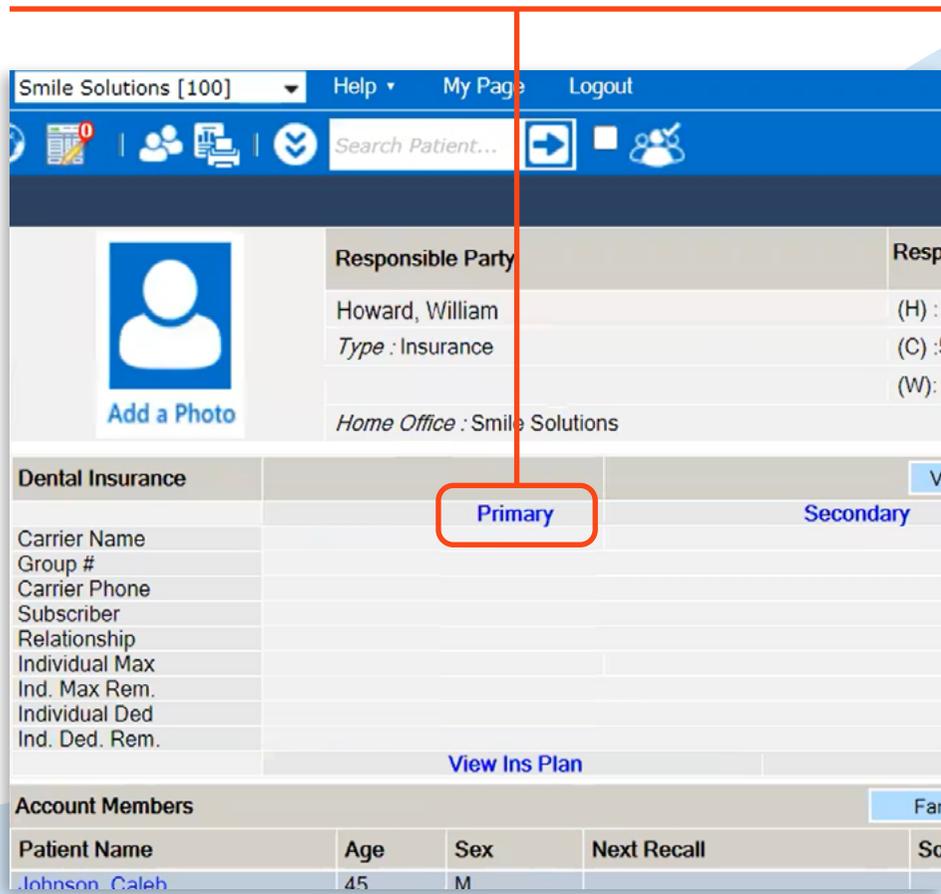
Select the patient from the list.



Step 3

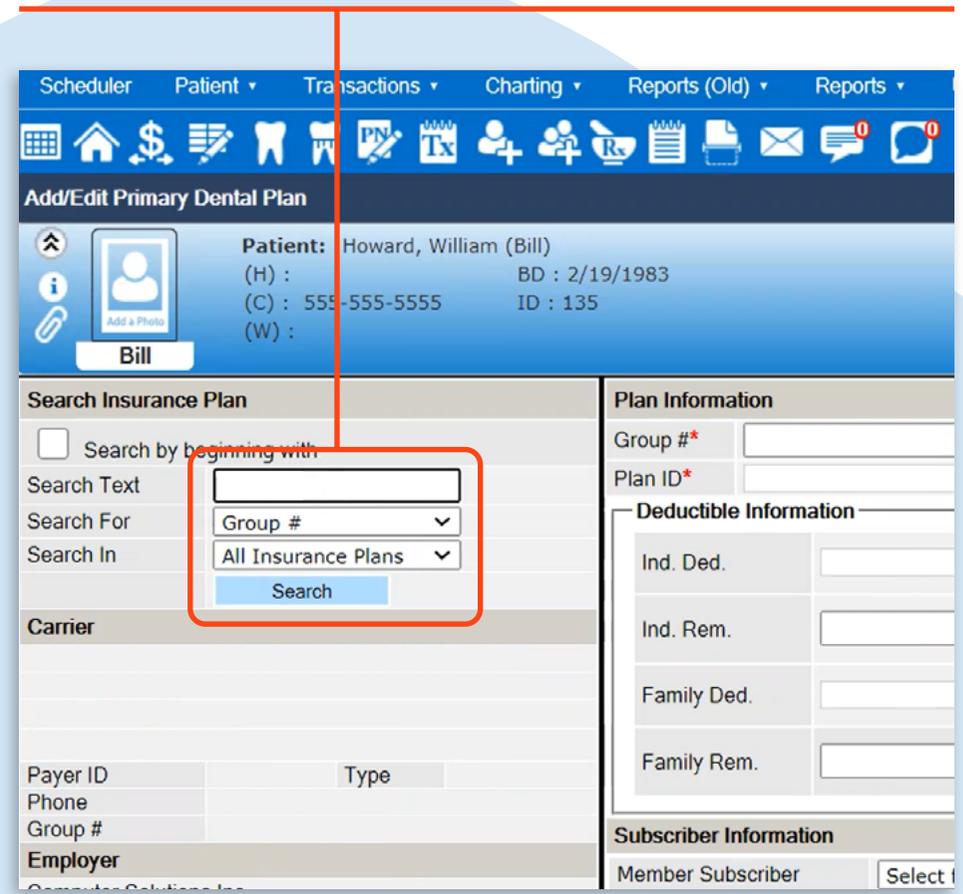
On the 'Patient Overview' screen, click **Primary** in the 'Dental Insurance' section.

Note: To add secondary insurance, simply click **Secondary** on the Patient Overview screen.



Step 4

Enter the desired criteria into the 'Search Text' section and update the 'Search For' section as needed, then click **Search**.



Step 5

Click the **plan** that is relevant to the patient, then click **Select**.

Note: Insurance plans can be viewed in more detail by clicking on the hyperlinked **Insurance Plan ID** in the first column of the pop-out screen.

The screenshot shows the 'Add/Edit Primary Dental Plan' window in the denticon software. A pop-up window titled 'Please select a plan' is displayed, showing a list of insurance plans. The pop-up has a 'Select' button in the top right corner. A red box highlights the first row of the table, which contains the following data:

Ins Plan ID	Group #	Carrier ID	Carrier Name	Employer Name	Created	Modified
112	2000 2190	721	MET LIFE	Plumbing Solutions	3/14/2021 PD DS4363	
113	2000 4000 (2500.00 100/80/50)	1090	CIGNA (PPO)	Delivery Solutions	3/14/2021 PD DS4363	3/14/2021 PD DS4363
114	2000 4000 (1500.00 90/70/50)	1090	CIGNA (PPO)	Delivery Solutions	3/14/2021 PD DS4363	3/14/2021 PD DS4363
110	2000-123	1114	PRINCIPAL FINANCIAL GROUP/LIF	Computer Solutions Inc	3/14/2021 PD DS4363	
111	2000-600	1114	PRINCIPAL FINANCIAL GROUP/LIF	Printing Solutions	3/14/2021 PD DS4363	3/14/2021 PD DS4363

The background window shows patient information for Howard, William (Bill), born 2/19/1983, with a responsible party of Howard, William. The search criteria for the insurance plan are '200' on 'Group #'. The background window also shows a 'Carrier' section with details for PRINCIPAL FINANCIAL GROUP/LIFE INSURANCE CO. and an 'Employer' section for Computer Solutions Inc.

Step 6

The insurance plan details will populate on screen. Enter the patient's subscriber number into the 'SubID' field and update any relevant fields, then click **Save**.

Note: If the responsible party is not the insurance holder, update the **Subscriber Information** section with the correct details.

Search Insurance Plan

Search by beginning with

Search Text: 200

Search For: Group #

Search In: All Insurance Plans

Carrier

MET LIFE
PO Box 981282
El Paso, TX 79998
Payer ID: 65978 Type: EClaim
Phone: 877-638-3379
Group #: 2000 2100

Employer

Plumbing Solutions

Plan Information

Group #: 2000 2100 Anni. Date Exp: 1/1/2022

Plan ID*: 112 Effective Date: Term Date

Deductible Information

Ind. Ded.: \$50.00

Ind. Rem.: \$50.00

Family Ded.: \$100.00

Family Rem.: \$100.00

Maximum Information

Ind. Max.: \$2,000.00

Ind. Rem.: \$2,000.00

Family Max.: \$99,999.00

Family Rem.: \$99,999.00

Ortho Max Information

Ind. Max.: \$1,500.00

Ind. Rem.: \$1,500.00

Dental Share of Cost

Month / Year: Jan 2008

Share: \$0.00

Unused (current month): 0

Eligibility Information

Eligibility: Unknown

Last Verified On:

Last Verified By:

Subscriber Information

Member Subscriber: Select from list

Last, First*: Howard, William

Address*: 45239 Peach Tree Road

City, St, Zip*: Newport Beach CA 92560

Phone:

Patient Rel to Sub*: Self

Created By: PDDS4363 Modified By: PDDS4363

Created On: 4/2/2021 7:16 AM PT Modified On: PT

Subscriber Plan Effective Date:

Subscriber Plan Term Date:

Birth Date*: 2/19/1983 Marital Status: Married

SubID*: 412365 Sex: Male

Buttons: Add/View Secondary Dental, Save, Delete, Cancel

Reports (Old) Reports Utilities Setup Office Smile Solutions [100] Help My Page Logout

Search Patient...

Patient ID : 135 [Edit](#)

Home Office Smile Solutions

Chart #

First Visit

Last Visit

Fee Schedule [i](#)

Provider Lopez, Carlos DDS

Hygienist

Referral Type Walk-in-sign

[Referred By](#)

[Referred To](#)

Last Perio Chart

 [Add a Photo](#)

Responsible Party
Howard, William
Type : Insurance
Home Office : Smile Solutions

Dental Insurance

Primary

Carrier Name [MET LIFE](#)

Group # 2000 2100

Carrier Phone 877-638-3379

Subscriber Howard, William

Relationship Self

Individual Max \$2,000.00

Ind. Max Rem. \$2,000.00

Individual Ded \$50.00

Ind. Ded. Rem. \$50.00

[View Ins Plan](#)

[Edit Recall](#) **Account Members**

	Sch Date	Sch Time	Patient Name	Age	Sex	Next Recall
evaluation	4/2/2021	10:00 AM	Howard, Bill	38	M	
Complete Series Of Radiographic	4/2/2021	10:00 AM				

[Archived Appt](#) [New Appt](#) **Billing**

Status	Prdr	Len	User	Current	Over 30	Over
Left Msg	HYGSAN	60	PDDS4363	\$0.00	\$0.00	\$0.00
Account Balance				\$0.00	\$0.00	\$0.00
Howard, William				\$0.00	\$0.00	\$0.00

Est. Insurance \$0.00 Est. Patier

[Detail](#) [View Ortho Plan](#)

em. Total Amt Last Ins. Pay \$0.00 Date

em. # Of Pay Last Pat. Pay \$0.00 Date

Last Statement \$0.00 Date

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The Insurance Plan has now been added to the patient's record.

Submit Pending Claims to a New Insurance Plan

Step 1

When updating a patient's insurance plan, Denticon will generate an alert if there are claims pending with the previous insurance plan. Use the **checkbox** to re-submit the claims to the new plan, then click **Apply** and **OK**.

The screenshot displays the 'Patient Window' interface. A dialog box titled 'Update Claims Primary Ins : MET LIFE' is open, showing a table of pending claims. The first row has a checked checkbox in the left margin. The 'Apply' button at the bottom of the dialog is highlighted with a red box. A second screenshot on the right shows a confirmation dialog with the text 'Selected claims processed successfully.' and an 'OK' button highlighted with a red box.

Service Date	Claim Type	Claim Status	Subscriber	Carrier	Office	Bill	Prdr	Action	Charges
3/31/2021	P	S	Molar, Amanda	CIGNA (PPO)	Smile Solutions	D	LING	Rebill	220.00

Step 2

Click the **Ledger** icon to see the re-billed claim.

Patient Overview

Patient Information

Nickname

Molar, Peter

5764 Amalgam Drive

Newport Beach, CA 92660

anything@anything.com Call my Home

(H) : 555-555-5555

(C) : 555-555-5557

(W):

Birth Date 3/1/1990

Age / Sex 31 / M

Patient Type

Patient Note

Medical Alerts:
(3/14/2021 9:46 PM PT)

Recalls

Code	Interval	RecallDate	Reason
D0210	3 Y + 1D	4/1/2024	Intraoral - Complete Images
D1110	6 M + 1D	10/1/2021	Prophylaxis - Adult

Step 3

Hover over the **N** to see the details of which insurance plan the claim was previously billed to, and which plan it is now billed to.

Utilities Setup Office Smile Solutions [100]

Type Age/Sex: 31 / M

First Visit: 3/31/2021

Last Visit: 3/31/2021

Balance Stat Sort By

N	Descr	Bill	Du
	Compsve Oral Eval- New/Est Pat	D	0
	Intraoral - Complete Series Of Radiographic Imag	D	0
	Prophylaxis - Adult	D	0
	Periodontal Charting	D	0
	Notes Pri Claim Billed to CIGNA (PPO) on 03/31/2021 with estimated insurance payment of 220.00. Now Re-Billed to MET LIFE on 04/02/2021 07:32:48		

Grand Total fo

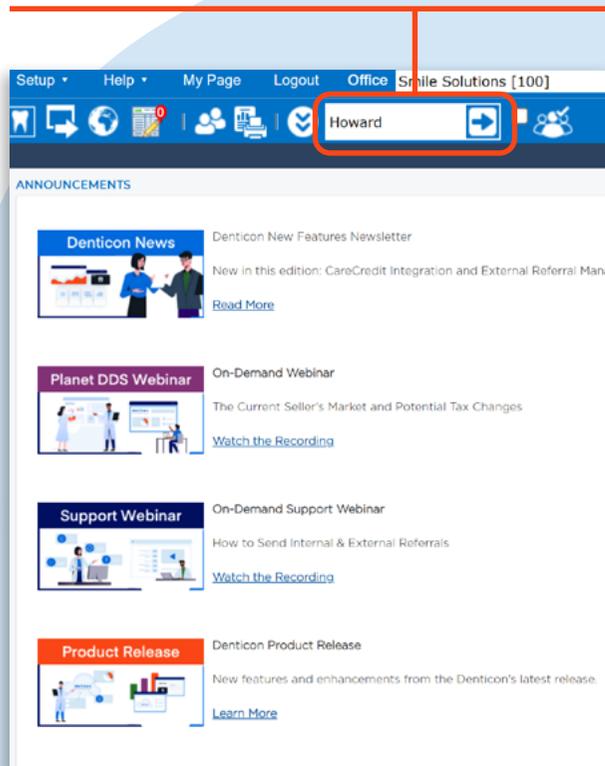
120	Balance	Est Ins	Est Pat	Today's Charg
0.00	220.00	220.00	0.00	0.
0.00	0.00	0.00	0.00	

This will confirm that the pending insurance claim has been resubmitted to the new insurance plan.

Remove Insurance from a Patient Record

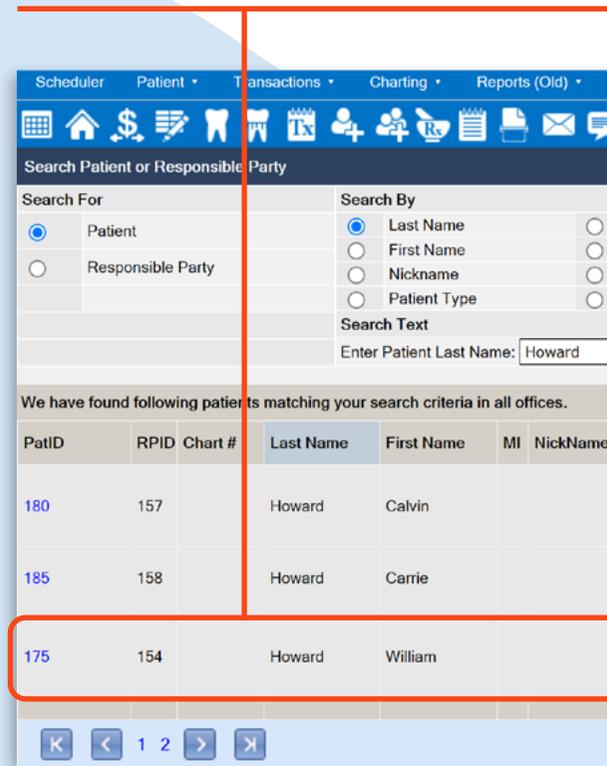
Step 1

To locate a patient file, type their last name into the 'Search Patient' field and click the **arrow**.



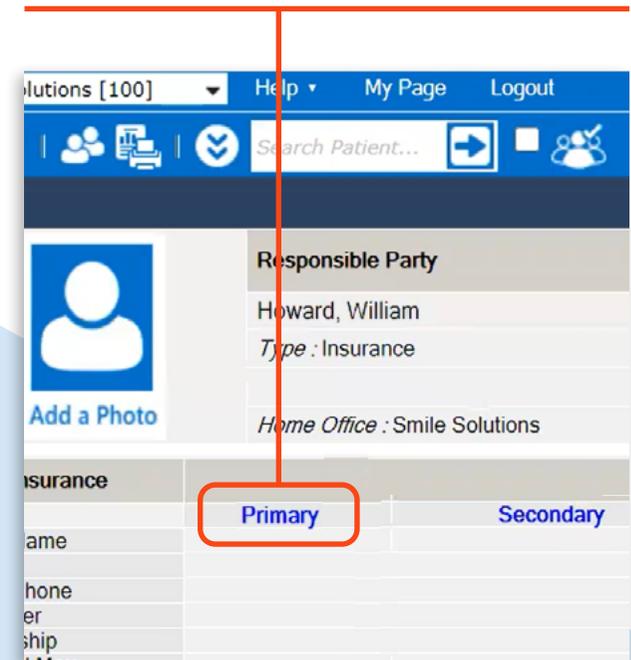
Step 2

Select the patient from the list.



Step 3

On the 'Patient Overview' screen, click **Primary** in the 'Dental Insurance' section.



Note: To remove secondary insurance, simply click **Secondary** on the Patient Overview screen.

Step 4

Add the relevant information in the Notes section and select **None** from the 'Patient Rel to Sub' dropdown, then click **Save**.

The screenshot displays the 'Add/Edit Primary Dental Plan' form in the Denticon software. The form is organized into several sections:

- Search Insurance Plan:** Includes search criteria like 'Search by beginning with', 'Search Text', 'Search For' (Group #), and 'Search In' (All Insurance Plans).
- Plan Information:** Contains fields for Group # (2000 2100), Anni. Date Exp (1/1/2022), Plan ID (112), Effective Date, and Term Date.
- Deductible Information:** Fields for Ind. Ded. (\$50.00), Ind. Rem. (\$50.00), Family Ded. (\$100.00), and Family Rem. (\$100.00).
- Maximum Information:** Fields for Ind. Max. (\$2,000.00), Ind. Rem. (\$2,000.00), Family Max. (\$99,999.00), and Family Rem. (\$99,999.00).
- Ortho Max Information:** Fields for Ind. Max. and Ind. Rem.
- Dental Share of Cost:** Fields for Month / Year, Share, and Unused (current month).
- Subscriber Information:** Fields for Member Subscriber (Select from list), Last, First (Howard, William), Address (8962 Sunset Drive), City, St, Zip (Newport Beach, CA, 92660), Phone, Birth Date (1/20/1971), and SubID (4561237).

Key actions and fields highlighted in red:

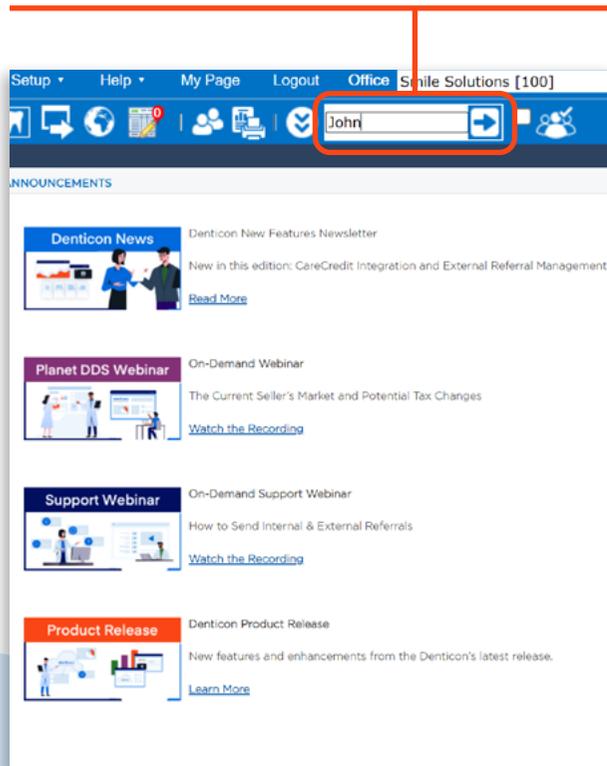
- The 'Patient Rel to Sub' dropdown is set to 'None'.
- The 'Save' button is highlighted.
- The 'Notes' section is highlighted with an empty text box.

The Insurance Plan has now been removed from the patient's record, but will still be searchable in Denticon, should you need to reapply it to the patient's record at any point.

Delete an Insurance Plan from a Patient Record

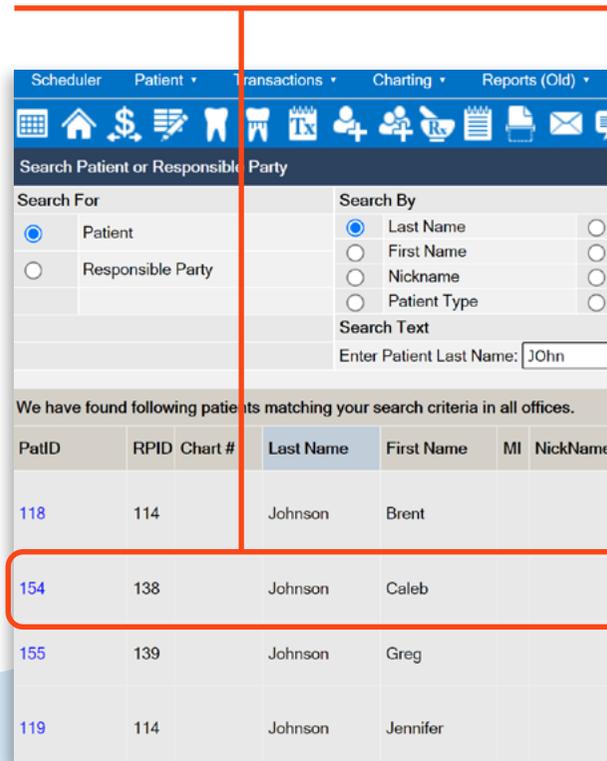
Step 1

To locate a patient file, type their last name into the 'Search Patient' field and click the **arrow**.



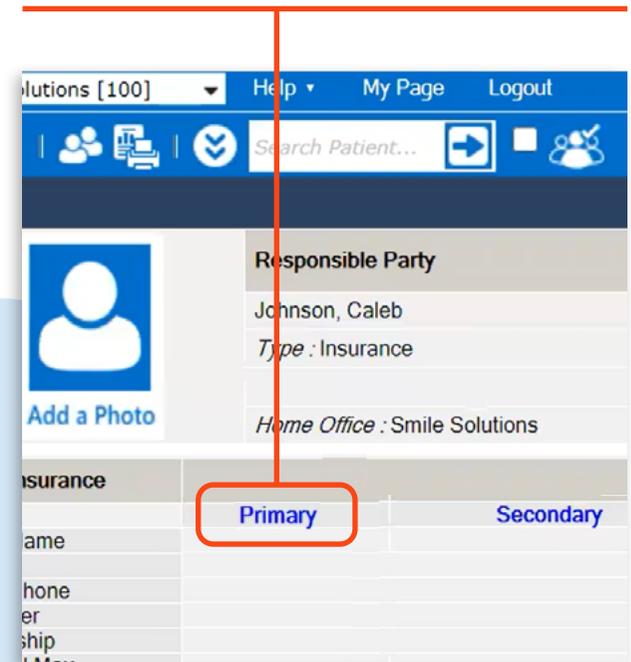
Step 2

Select the patient from the list.



Step 3

On the 'Patient Overview' screen, click **Primary** in the 'Dental Insurance' section.



Note: To delete secondary insurance, simply click **Secondary** on the Patient Overview screen.

Step 4

In the 'Subscriber Information' section, enter the date the patient's plan was terminated in the 'Subscriber Plan Term Date' field, and select **None** from the 'Patient rel to Sub' dropdown, then click **Save**.

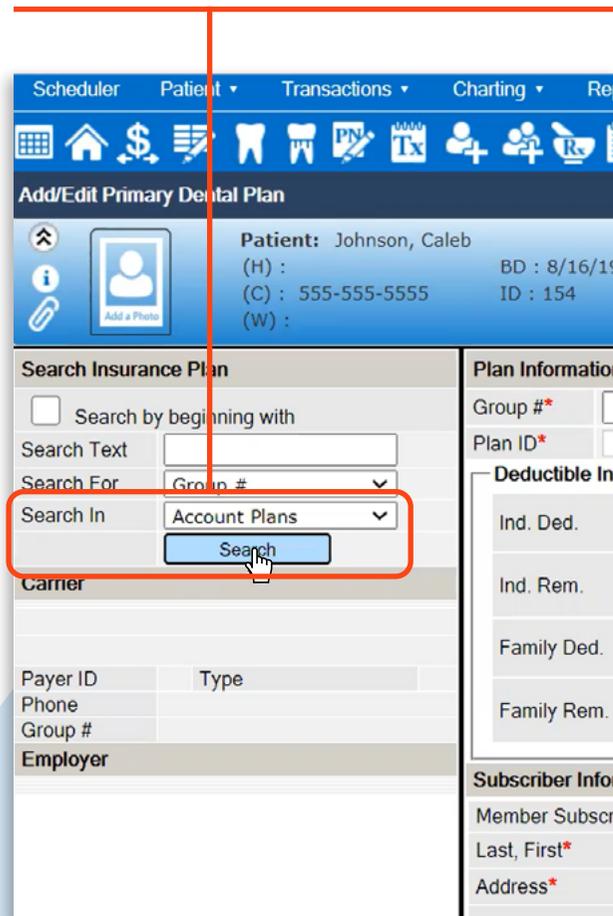
The screenshot displays the 'Add/Edit Primary Dental Plan' form in the Denticon software. The interface includes a top navigation bar with menus like Scheduler, Patient, Transactions, Charting, Reports, Utilities, Setup, Office, and Help. Below the navigation bar is a toolbar with various icons and a search field. The main form area is divided into several sections:

- Patient Information:** Johnson, Caleb (H), BD: 8/16/1975, ID: 154. Responsible: Johnson, Caleb. Prim. Ins: MET LIFE. Sec. Ins: 877-638-3379 SubID: 4561237.
- Plan Information:** Group #: 2000 2100, Plan ID: 112, Effective Date: 1/1/2022, Term Date: (empty). Created By: PDDS4363, Modified By: PDDS4363.
- Deductible Information:** Ind. Ded.: \$50.00, Ind. Rem.: \$50.00, Family Ded.: \$100.00, Family Rem.: \$100.00.
- Maximum Information:** Ind. Max.: \$2,000.00, Ind. Rem.: \$2,000.00, Family Max.: \$99,999.00, Family Rem.: \$99,999.00.
- Ortho Max Information:** Ind. Max.: \$1,500.00, Ind. Rem.: \$1,500.00.
- Dental Share of Cost:** Month/Year: Jan 2008, Share: \$0.00, Unused (current month): \$0.00.
- Eligibility Information:** Eligibility: Unknown, Last Verified On: (empty), Last Verified By: (empty).
- Subscriber Information:** Member Subscriber: Select from list, Last, First: Johnson, Caleb, Address: 96531 Ocean Breeze Dr, City, St, Zip: Newport Beach, CA, 92660, Birth Date: 8/16/1975, Marital Status: Married, Sex: Male, SubID: 4561237.
- Patient Rel to Sub:** None (highlighted with a red box).

At the bottom of the form, there are buttons for 'Add/View Secondary Dental', 'Save' (highlighted with a red box), 'Delete', and 'Cancel'. An 'Insert Date Stamp' button is also present in the bottom right corner.

Step 5

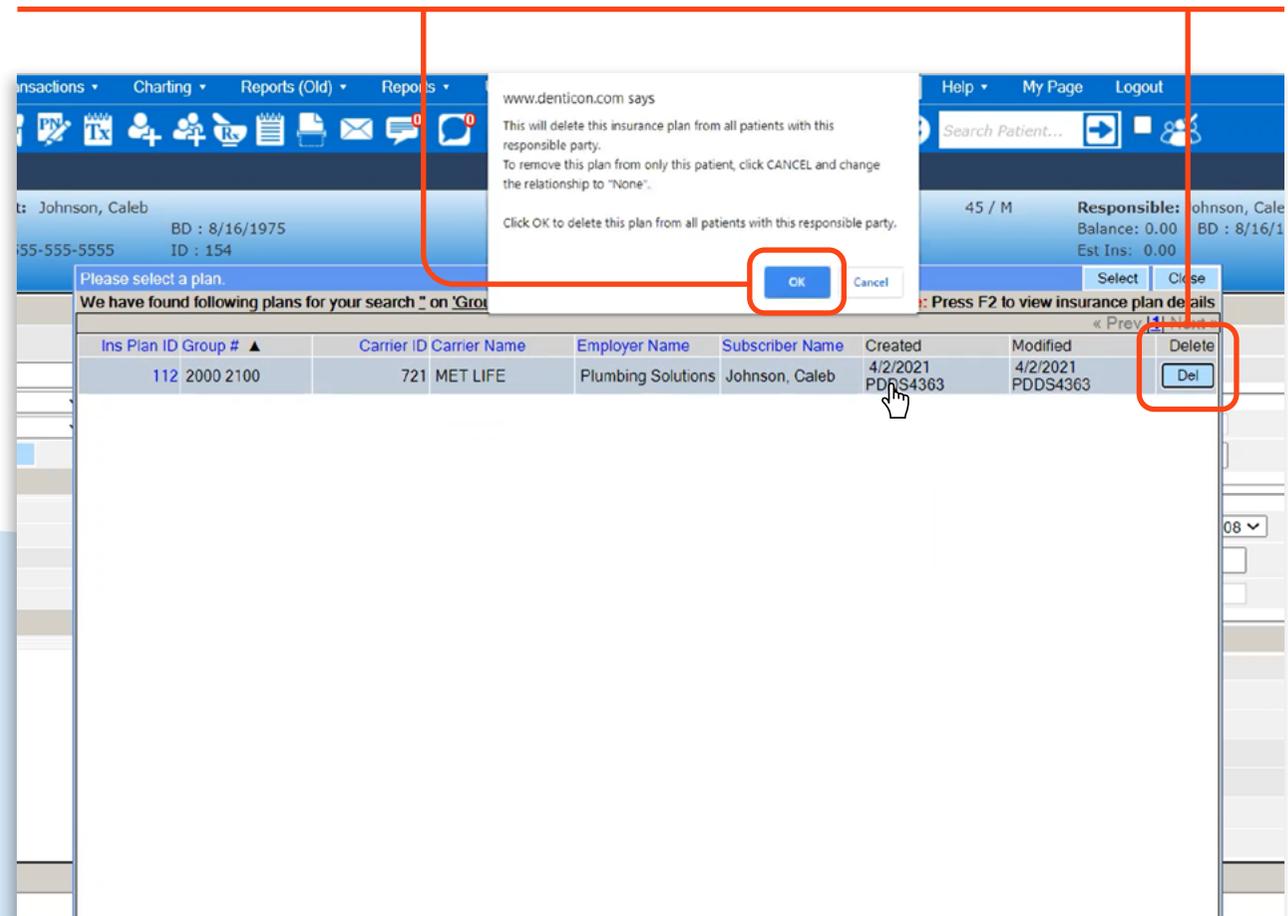
In the 'Search Insurance Plan' section, select **Account Plans** from the 'Search In' dropdown, and click **Search**.



Step 6

Click **Del** (the delete button) against the relevant plan, then click **OK** in the pop-up window.

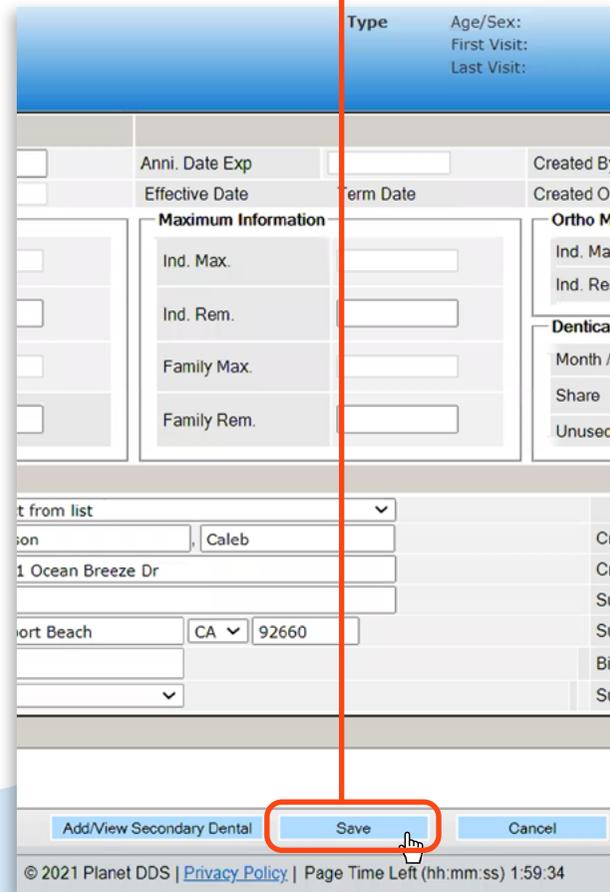
Note: Denticon will not allow a plan to be deleted if it is being used by or if there are pending claims for other patients on the account.



Step 7

Another pop-up will appear confirming the Insurance Plan has been successfully deleted. Click **OK** and then click **Save**.

Note: Insurance plans cannot be deleted if there are open claims tied to the plan.



The Insurance Plan has now been successfully deleted from the patient's record and will not show in a search.