

Denticon - Basic Clerical

How to Add, Change and Remove Existing Insurance Plans

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Add Insurance to a Patient Record

Step 1

Step 2

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

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Enter the desired criteria into the 'Search Text' section

and update the 'Search For' section as needed, then

Step 3

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

Note: To add secondary Secondary on the Pati	insurance, ent Overvie	simply click w screen.								
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Step 4

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.

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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.

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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**.

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Step 2

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

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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.

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



Remove Insurance from a Patient Record

Step 1

Help •

Denticon News

Planet DDS Webinar

Support Webinar

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ANNOUNCEMENTS

My Page

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

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On-Demand Webinar

Watch the Recording

Watch the Recording

Denticon Product Release

Learn More

On-Demand Support Webinar

How to Send Internal & External Referral

Denticon New Features Newslette

Logout Office Smile Solutions [100]

n this edition: CareCredit Integration and External Referral Man

The Current Seller's Market and Potential Tax Changes

New features and enhancements from the Denticon's latest release

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Step 2

Select the patient from the list.

Patient • ansactions • Charting • Reports (Old) 🏠 🔍 📝 🕷 🗑 🔣 🕰 🕰 😿 \times Search Patient or Responsible Party Search For Search By Last Name \bigcirc Patient First Name C \bigcirc Responsible Party Nickname Patient Type Search Text Enter Patient Last Name: Howard We have found following patier ts matching your search criteria in all offices. **RPID Chart #** PatID Last Name First Name MI NickName 180 157 Calvin Howard 185 158 Howard Carrie 175 154 William Howard К < 1 2 > Х

Step 3

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

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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**.

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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.

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119		114			Johnson		Jennifer					



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**.

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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**.



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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 up in a search.