Create and submit Pre-Determinations and Claims electronically

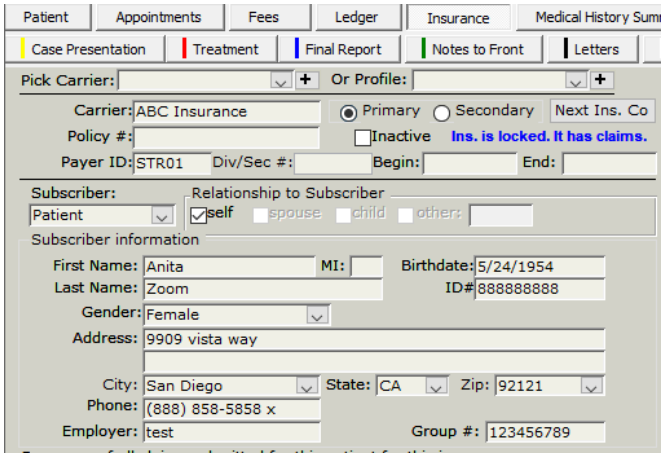
613 TDO KB February 26, 2026 Insurance Tools, Site Configuration, TDO software 14.47K

Overview

How to send a Pre-determination or an E-Claim, step by step from Insurance, Creating, Submitting, and Uploading.

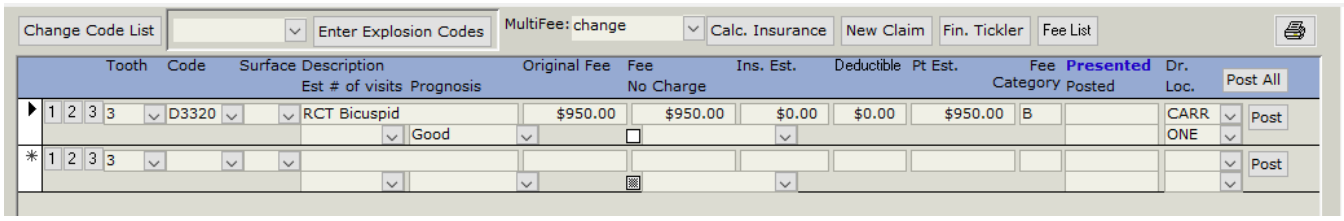
Detailed Instructions

- Make sure the patient's insurance information is entered in the **Insurance** page.

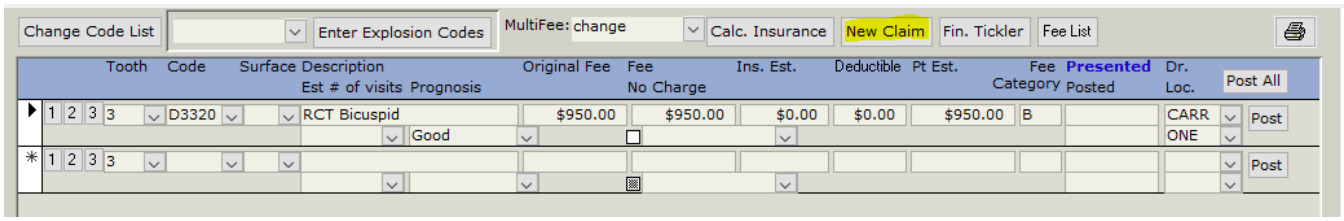


Pre-Determination

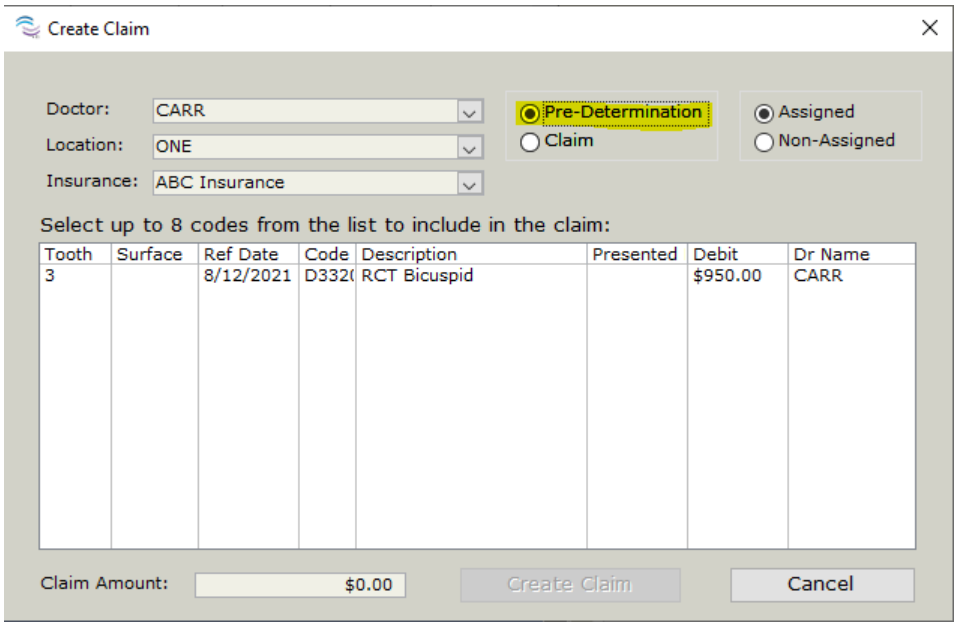
- In the **Fees** page, add the fees **without** clicking 'Post' or 'Post All' buttons.



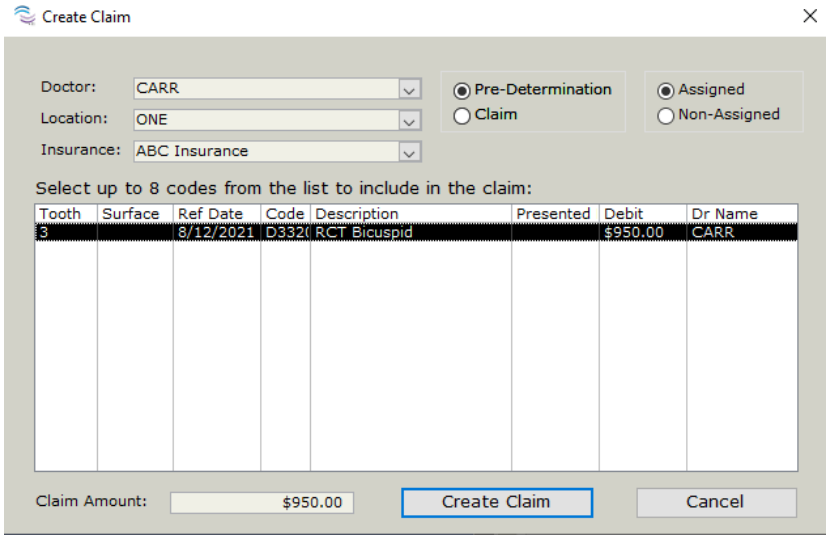
- Click on the **"New Claim"**button.



- On the "Create Claim" window, check the box for **"Pre-Determination".**

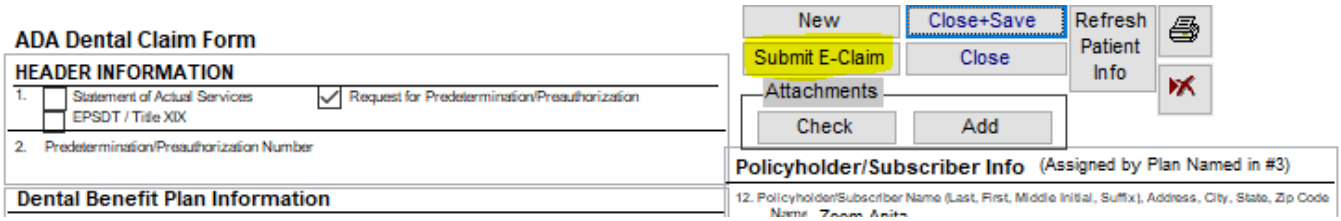


- Make sure the right doctor shows in the Doctor field, the Location is the right one (for multi-location offices), and the insurance name shows on the Insurance field.
- Highlight or select the fee available, then click the “Create Claim” button

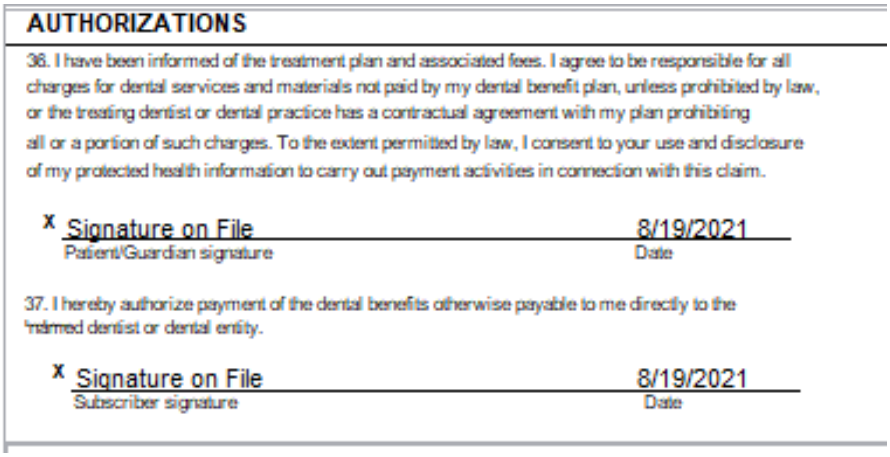


Assigned vs Non- Assigned

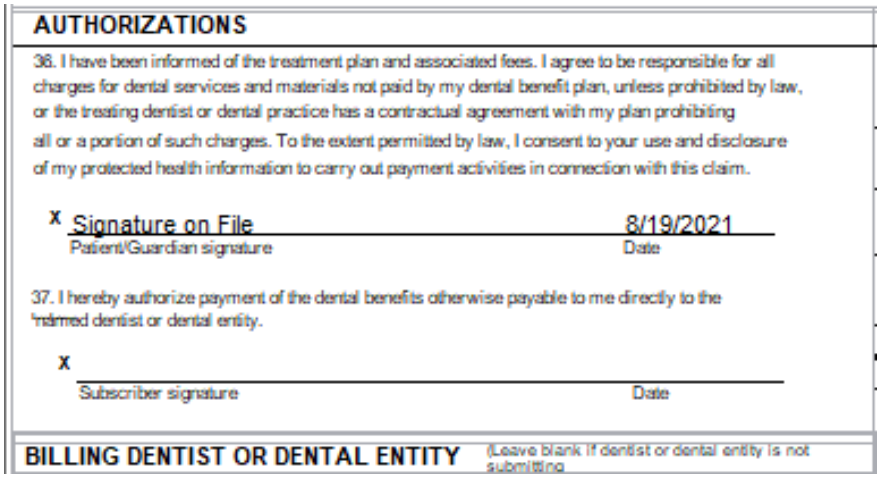
- If the payment is elected to be received by the **Office** from the Insurance select **Assigned**.
- If the payment is elected to be received by the **Patient** from the Insurance select **Non-Assigned**
- The Pre-Determination form will be created in TDO
- Click on the **“Submit E-Claim”** button, Even though it is a predetermination it will send as a Pre-Determination



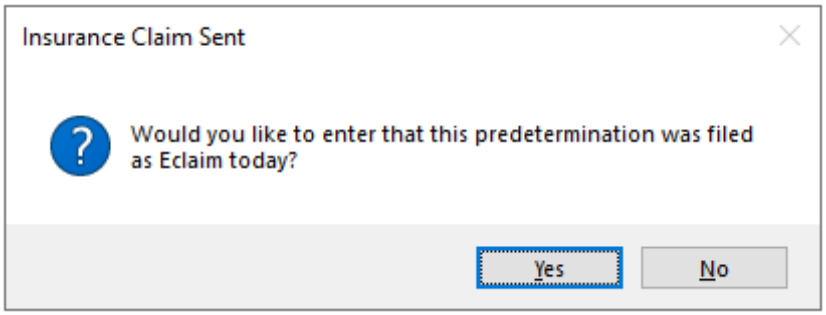
- If the E-Claim was elected to be **Assigned** and paid to the Office the claim will have Signature on file for both the Parent/Guardian and Subscriber (insured individual)



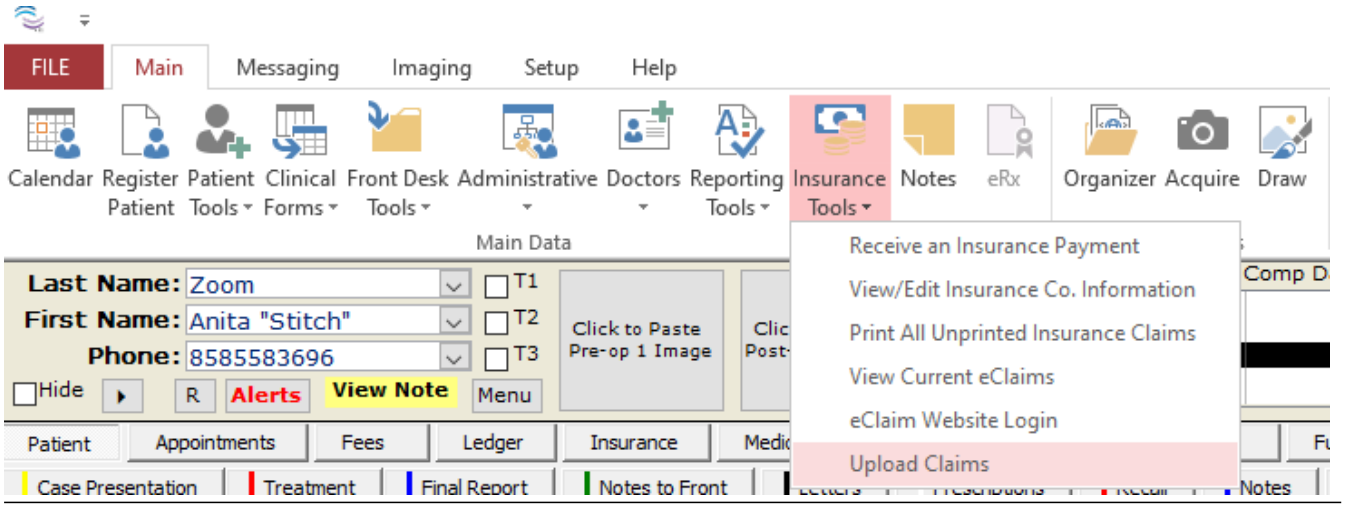
- If the E-Claim was elected to be **Non-Assigned** and paid to the Subscriber the claim will only have the Signature on File for the Parent and Guardian and not the subscriber



- Select **YES** to the question: Would you like to enter that this predetermination was filed as E-Claim today?

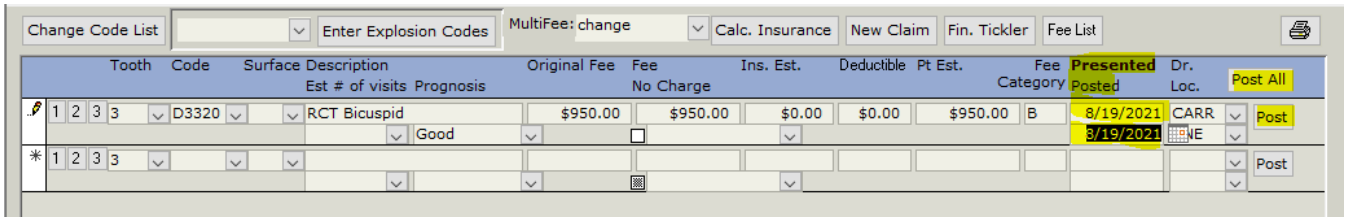


- Click on Insurance Tools> Upload Claims, to send all made E-Claims to DentalxChange

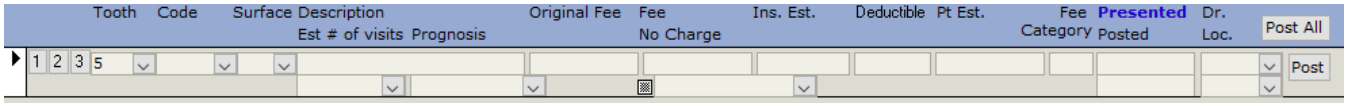


E-Claim

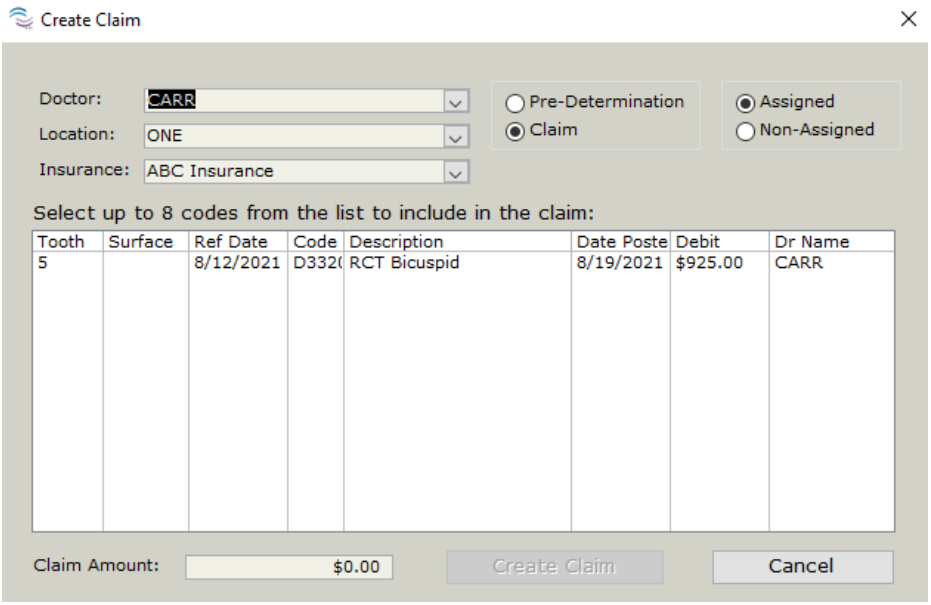
- After insurance is verified and filled out go to **Fees** tab
- Post the Fees that are planned to be billed to Insurance. Click **Post** or **Post All** if there are several fees to be posted for claim.
- Add the date by clicking in the box this will show when the fees were being posted and presented to the patient. Both boxes need to be filled.



- Fee is now posted to ledger and will be removed from the **Fees** page

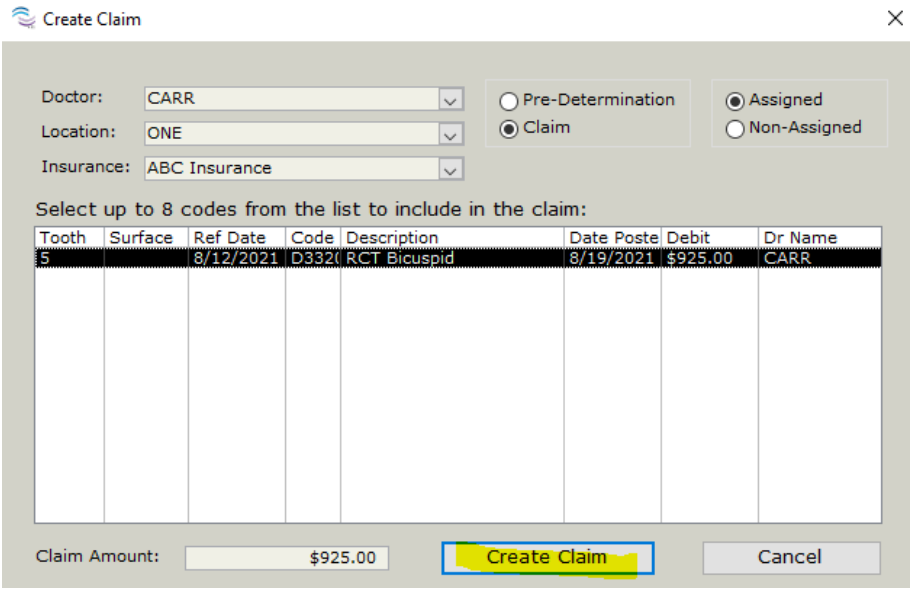


- Click **New Claim**
- The code will show here with the Insurance

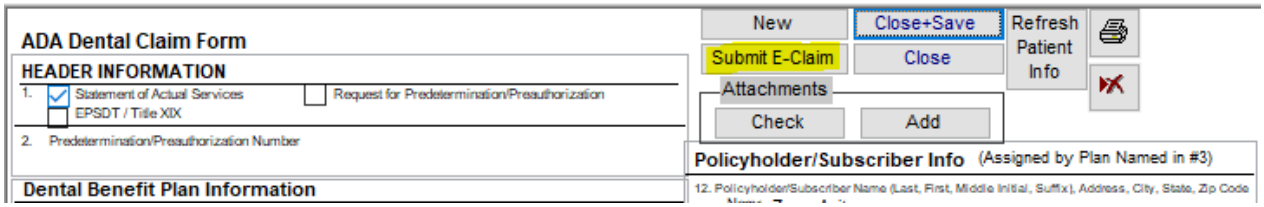


Assigned vs Non- Assigned

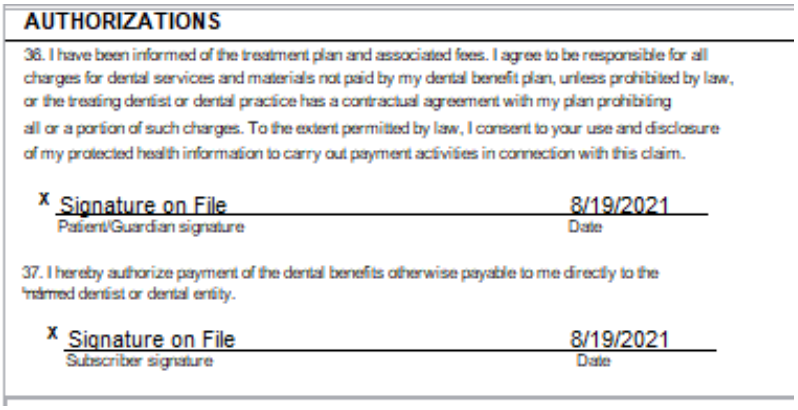
- If the payment is elected to be received by the **Office** from the Insurance select **Assigned**.
- If the payment is elected to be received by the **Patient** from the Insurance select **Non-Assigned**
- Click the code and select **Create Claim** to create the claim form



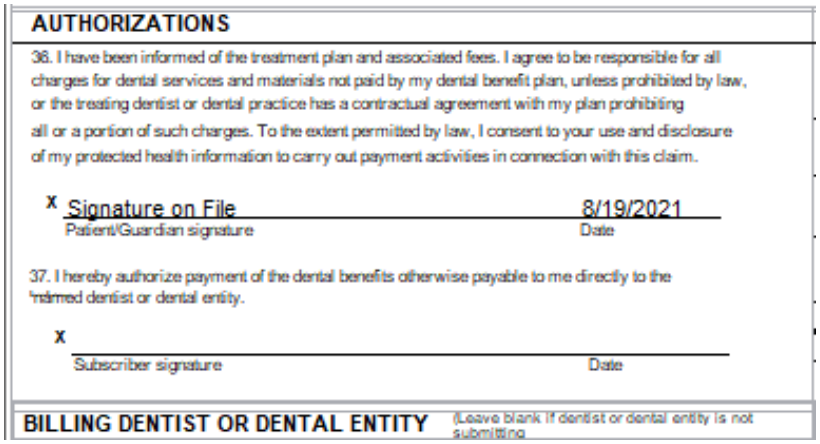
- Claim form will show for review
- You can add attachments if needed see this article. This **Attachments** functionality is added in version 12.338 and higher and Only .jpg, .png, and .gif files can be attached.
- Select **Submit E-Claim**

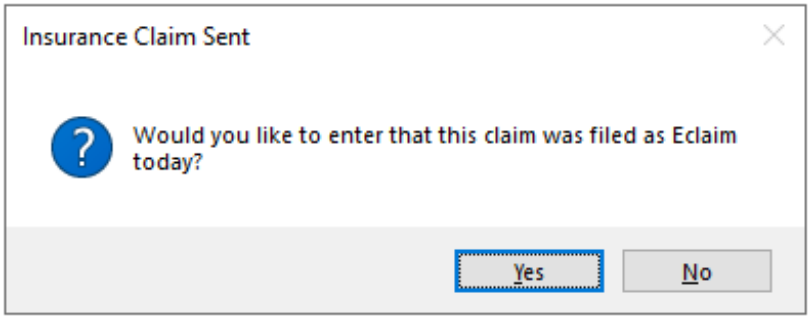


- If the E-Claim was elected to be **Assigned** and paid to the Office the claim will have Signature on file for both the Parent/Guardian and Subscriber (insured individual)



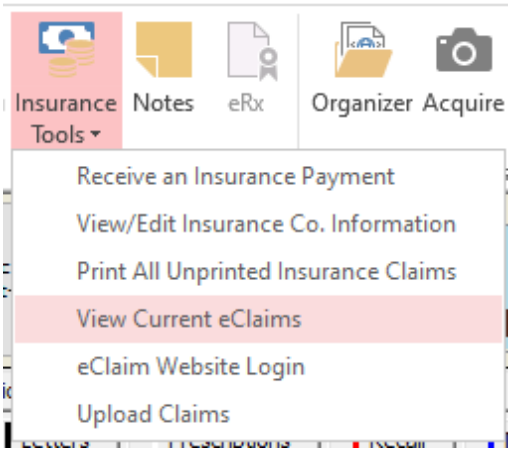
- If the E-Claim was elected to be **Non-Assigned** and paid to the Subscriber the claim will only have the Signature on File for the Parent and Guardian and not the subscriber

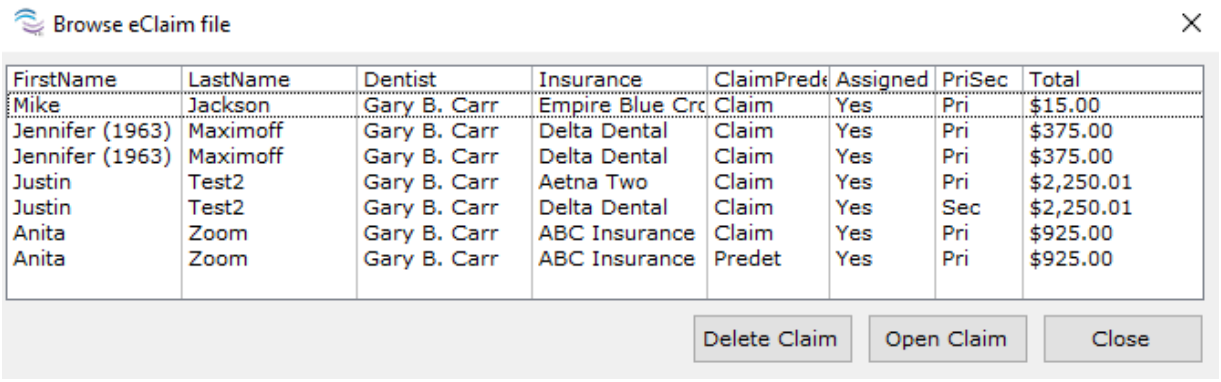




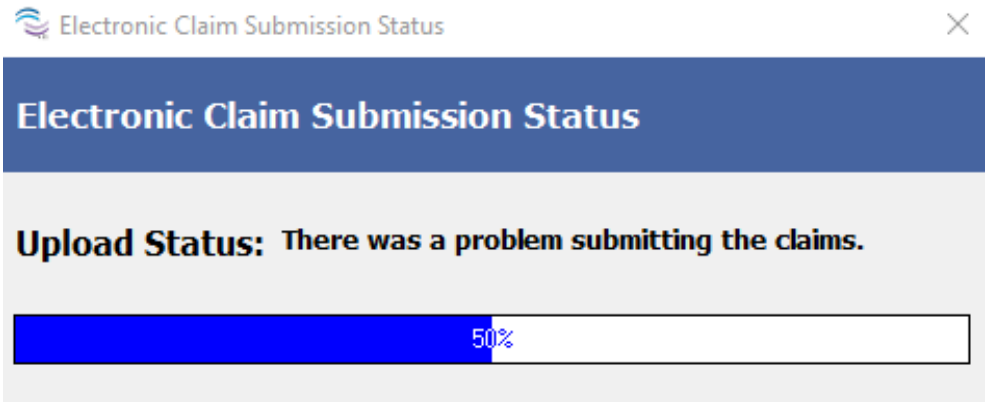
Upload Claim

- You can view the E-Claims that are pending and ready to send
- **Insurance Tools> View Current E-Claims**



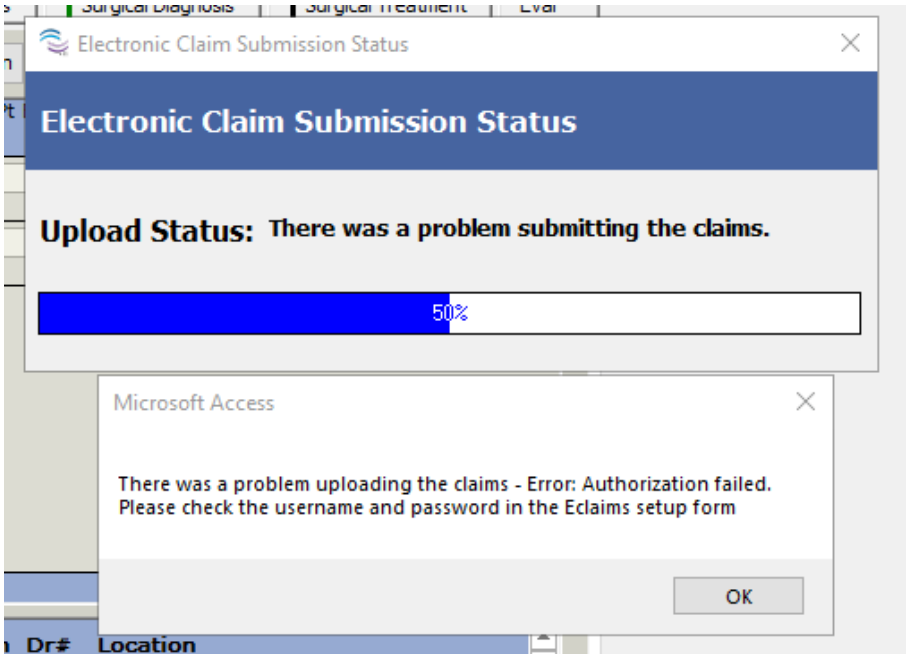


- To send all E-Claims that are ready to go
- **Insurance tools> Upload Claims**
- A progress bar will show and notify when complete

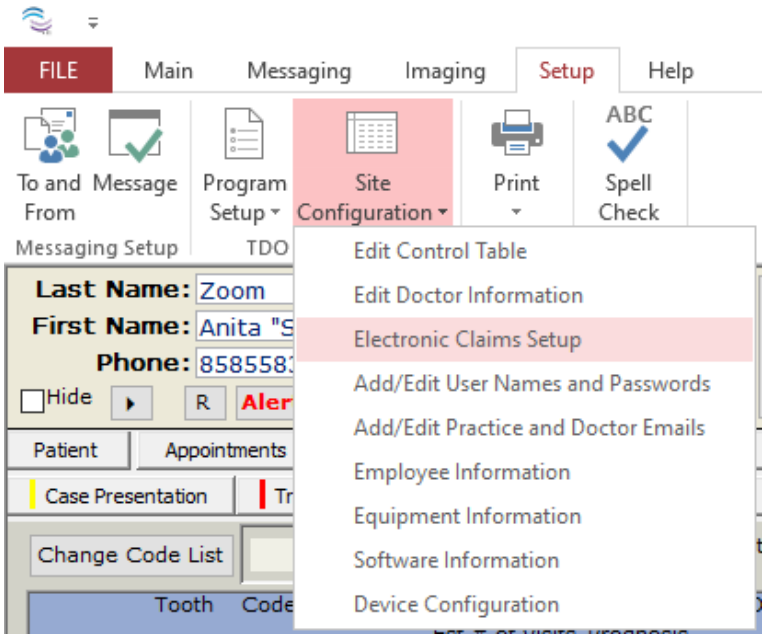


Error Sending Claim

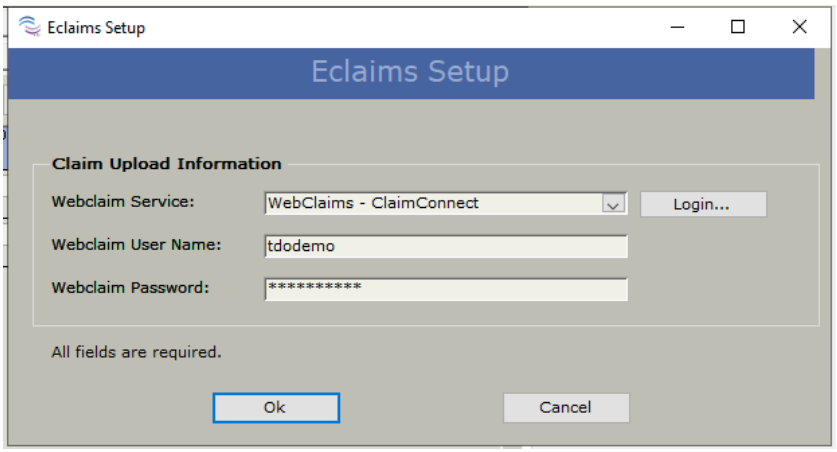
- If the upload fails Verify that you DentalxChange Password and login are correct,



- Verify that you TDO login information is correct
- **Setup> Site Configuration>Electronic Claim Setup**



- Type in the correct Username and Password



- Click **Login** to open the DentalxChange website to verify the correct information
- Then Select **OK** in TDO to have the updated Password saved and repeat the **Upload** process to send Electronic Claims.

Online URL: https://kb.tdo4endo.com/article.php?id=613