Insurance - Centralized Claims with DXC - view current claims [v12.405g and above]

861 TDOKB1 September 2, 2025 Insurance, Insurance Tools, Site Configuration 9.04K

Overview

TDO feature that allows multi-location offices to upload and print Claims from one centralized location with Dental X Change. This feature is available on **TDO version 12.405g and above**.

Important: Before switching to “Centralized Claims,” upload all current eclaims created.

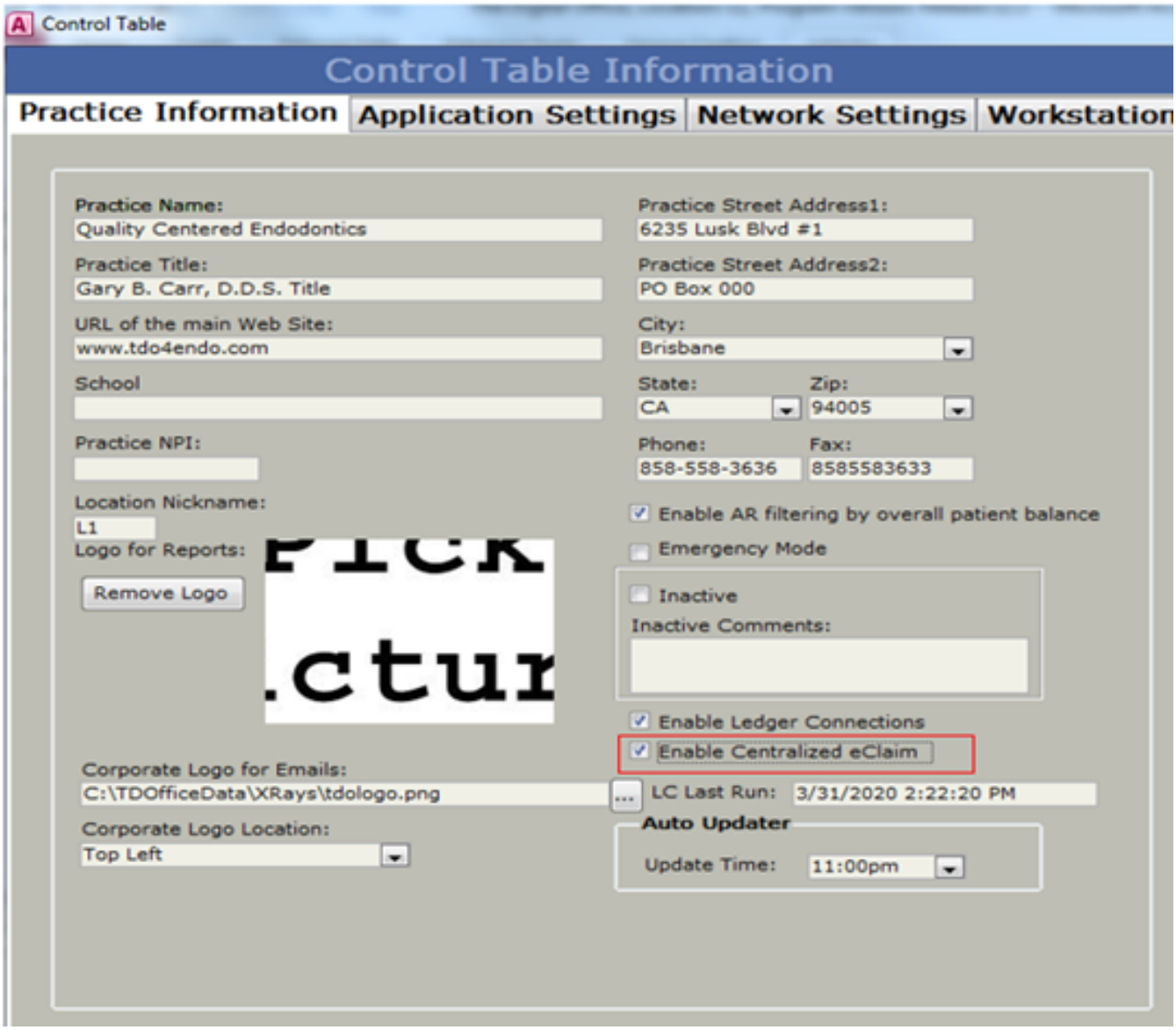
Detailed Instructions

To enable Centralized Claims:

1. Setup > Site Configuration > Edit Control Table > Practice Information.

2. Check the “Enable Centralized eClaim” box.

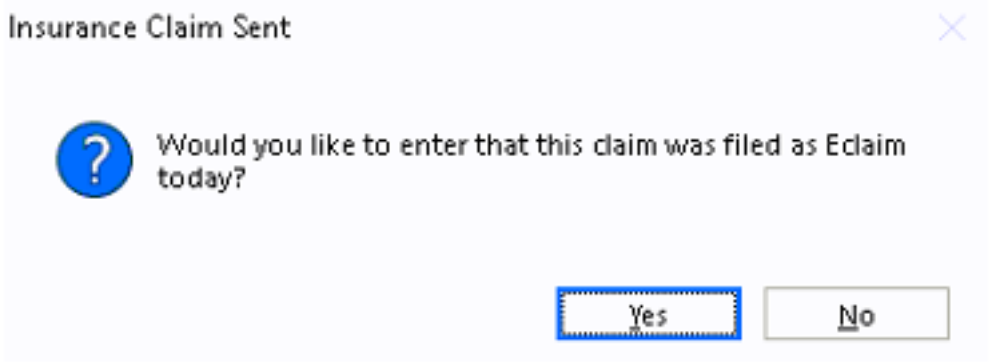
Note: This is a system-wide setting; once the box is checked at main location, the box will show as checked at the satellite locations.



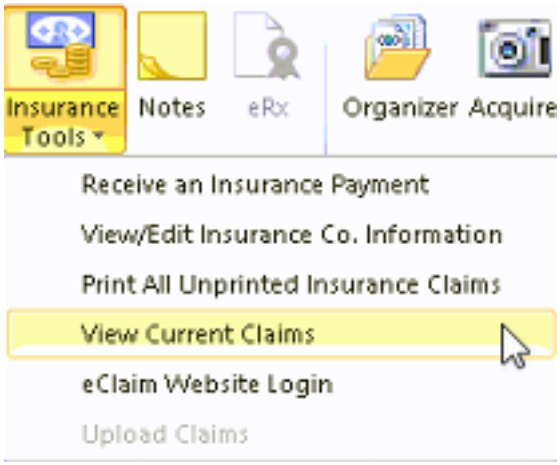
3. Create an electronic claim as you normally do.

4. Click “Submit E-Claim”.

5. Click “Yes” on the Insurance Claim Sent pop-up.

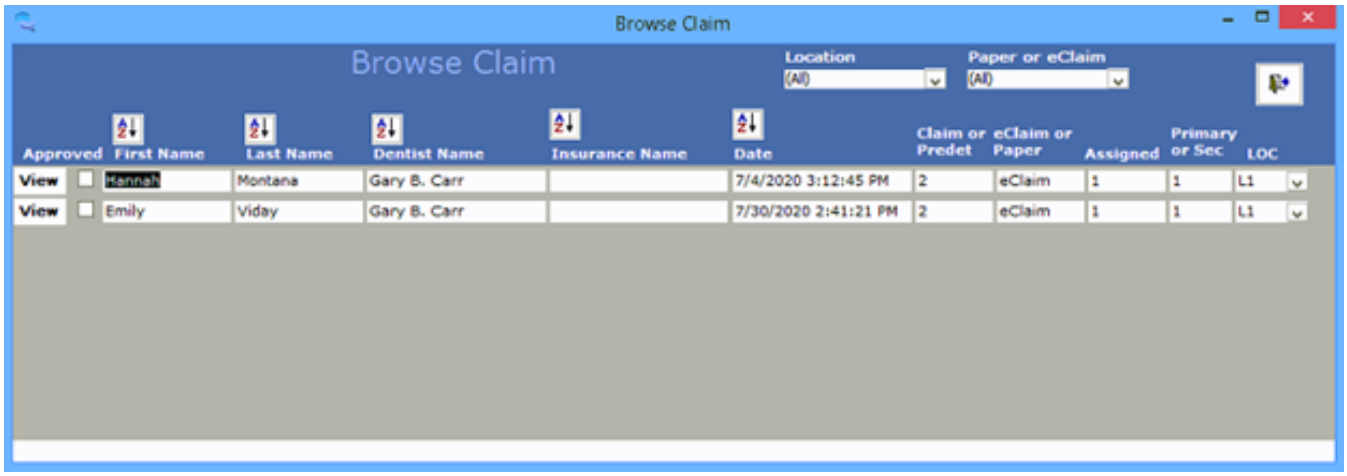


6. You can now view and approve current Claims created from any location by going to Insurance Tools – View Current Claims.

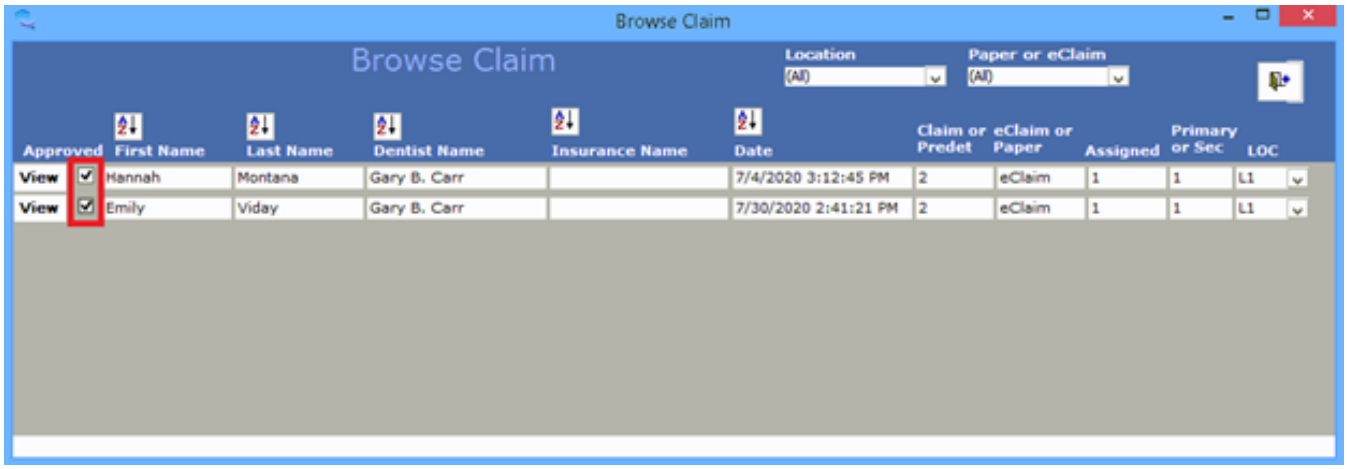


The “Browse Claim” window displays eClaims and paper claims that are pending. Users can:

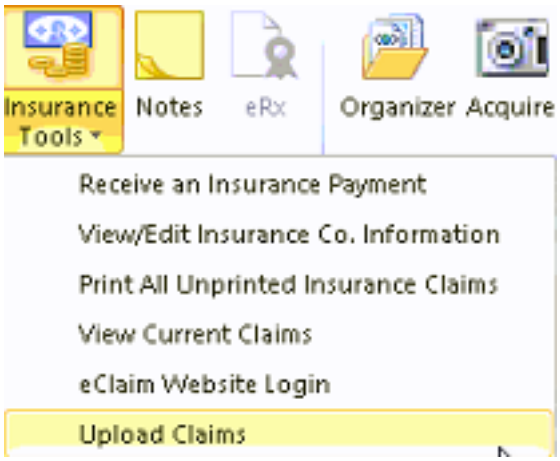
- Filter by paper or electronic claims as well as by location.
- Sort by patient name, doctor name, and date.
- View claims as well as mark them as approved.



Before an eClaim can be submitted, the “Approved” checkbox must be checked for each claim.



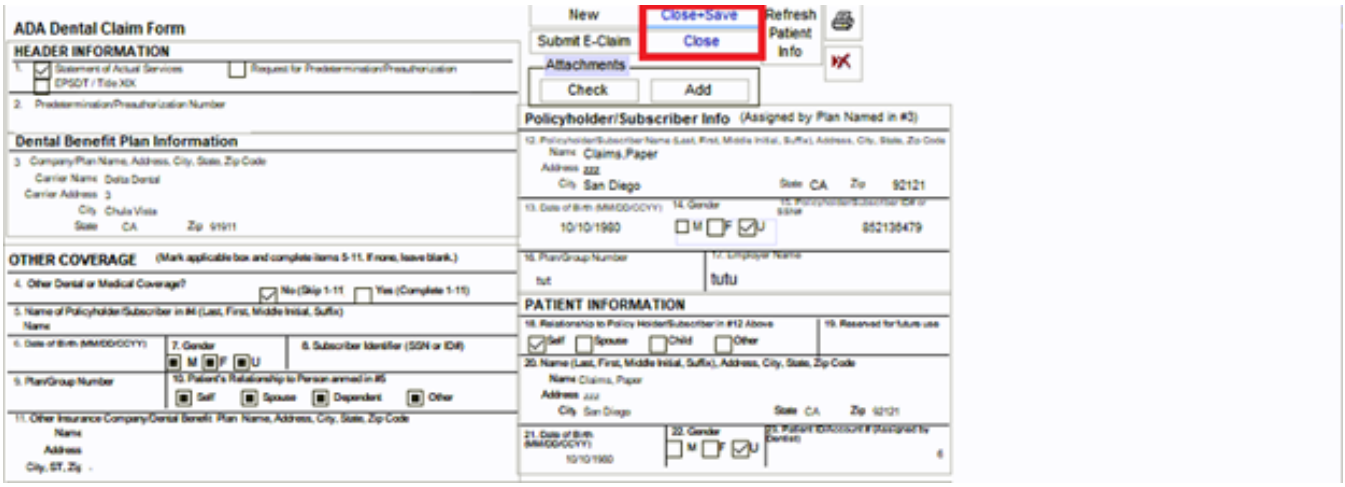
When ready to upload, go to Insurance Tools > Upload Claims.



Reminder: only approved eClaims will be uploaded.

To Print All Unprinted Insurance Claims

Create a claim as you normally do. On the print preview of the claim, click on “Close+Save” or “Close” button.

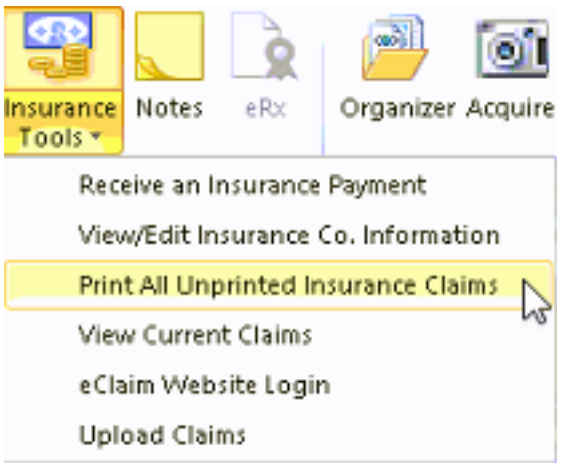


Click **No** when asked “to enter this claim as Paper Claim today” so users can print all the claims create at once in the next step.

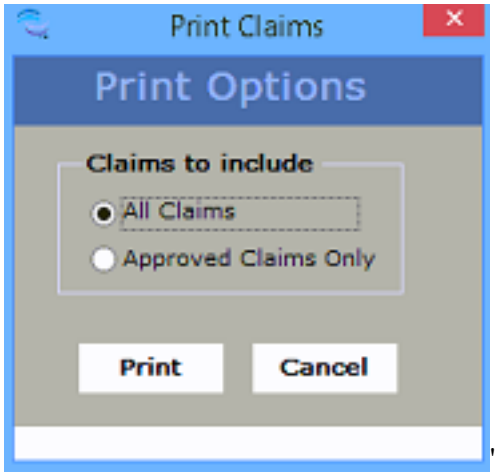
Before printing paper claims, users can go to 'View Current Claims', where you can:

- Filter by paper or electronic claims as well as by location.
- Sort by patient name, doctor name, and date.
- View claims as well as mark them as approved.

When ready to print, go to Insurance Tools > Print All Unprinted Insurance Claims.



The “Print Claims” window will open.



You have the option of printing all unprinted claims or only approved claims.