How to attach X-rays to an insurance claim in Dentrix

This guide shows you how to attach X-rays to an insurance claim in Dentrix, along with perio charts, intraoral photos, and other supporting documents. You start from an existing claim in the patient's ledger, add the attachments, and then submit the claim through the Batch Processor. Sending complete documentation with the claim helps the insurance carrier review and approve it.

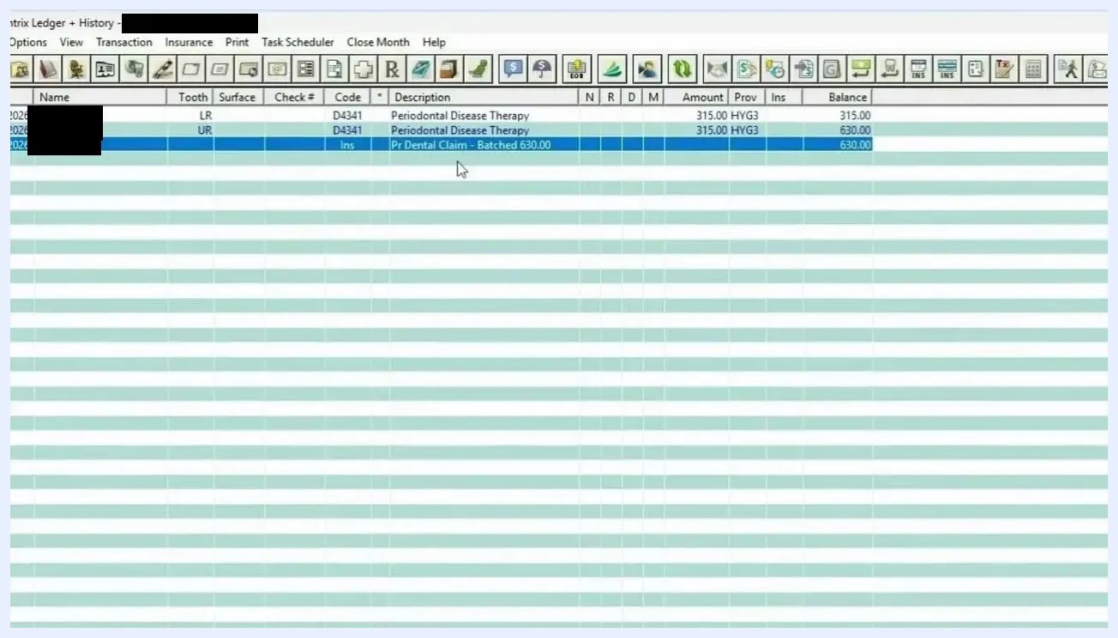
Prerequisites

- The patient's procedure codes are already posted in the ledger.
- The insurance claim is already created.
- Your X-rays, photos, and perio exams are available in Dentrix or in a connected imaging system such as Dexis or Smart Image.

Open the claim and add attachment details

1. Open the patient's ledger

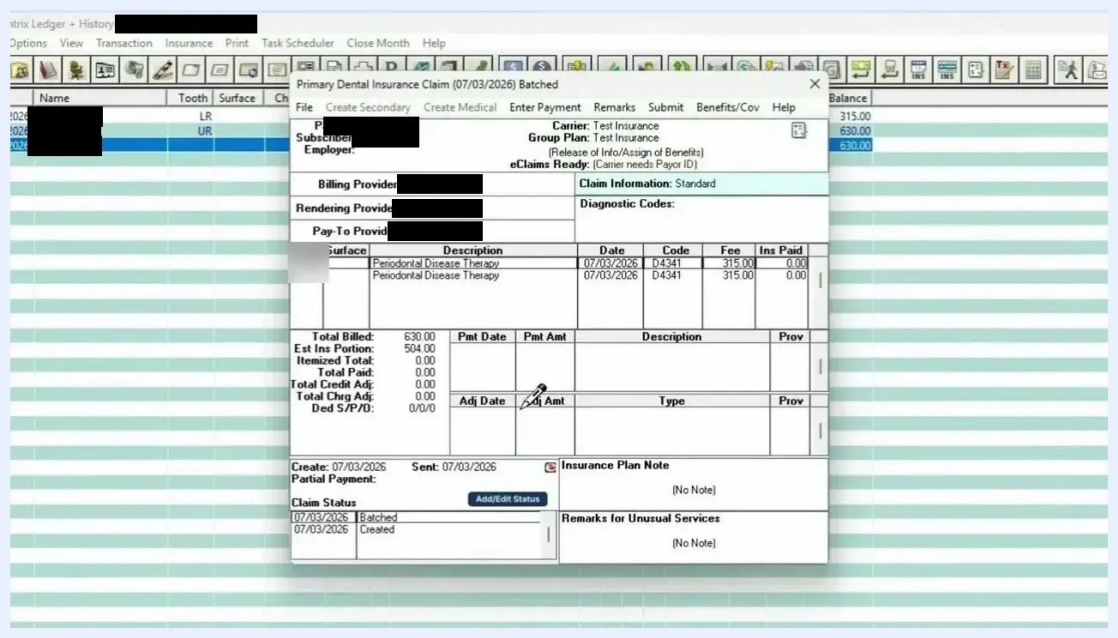
Open your dental management software and go to the patient's ledger. Confirm that the procedure codes and the insurance claim already exist. If you need to create the claim first, refer to the instructional video on creating an insurance claim.



Patient ledger showing procedure codes and an insurance claim for "Testy Tester" with descriptions and amounts

2. Open the existing insurance claim

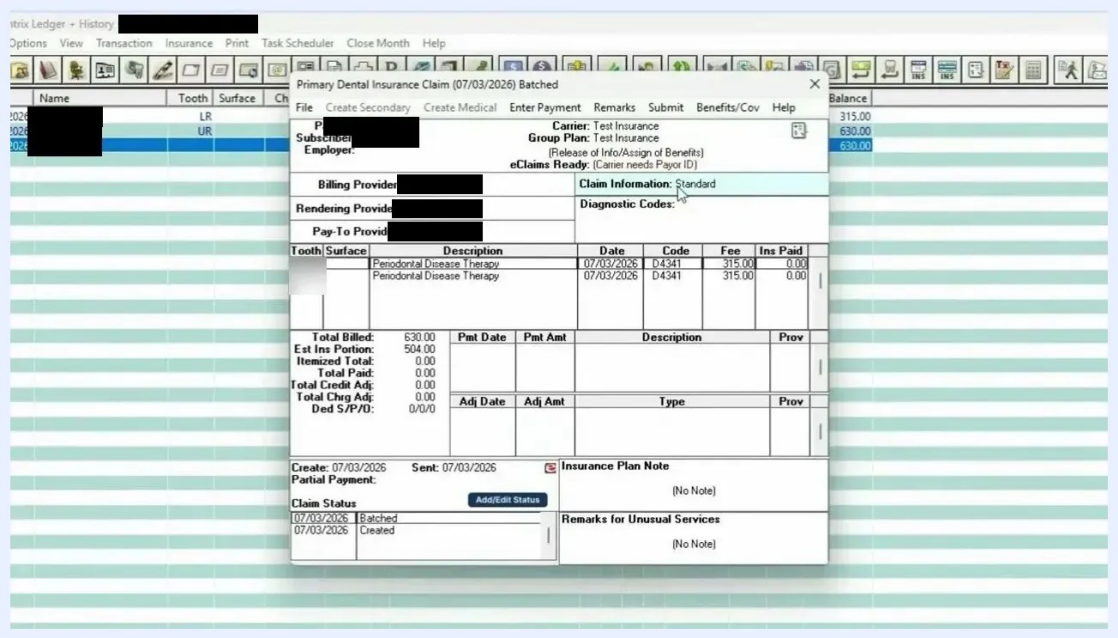
Find the insurance claim entry in the ledger and double-click it. The claim details window opens.



Primary Dental Insurance Claim window showing the patient, provider, and claim details

3. Open the Claim Information field

In the claim details window, find the **Claim Information** section. Double-click the **Claim Information** field to open the Insurance Claim Information dialog.



Claim Information field highlighted in the claim details window

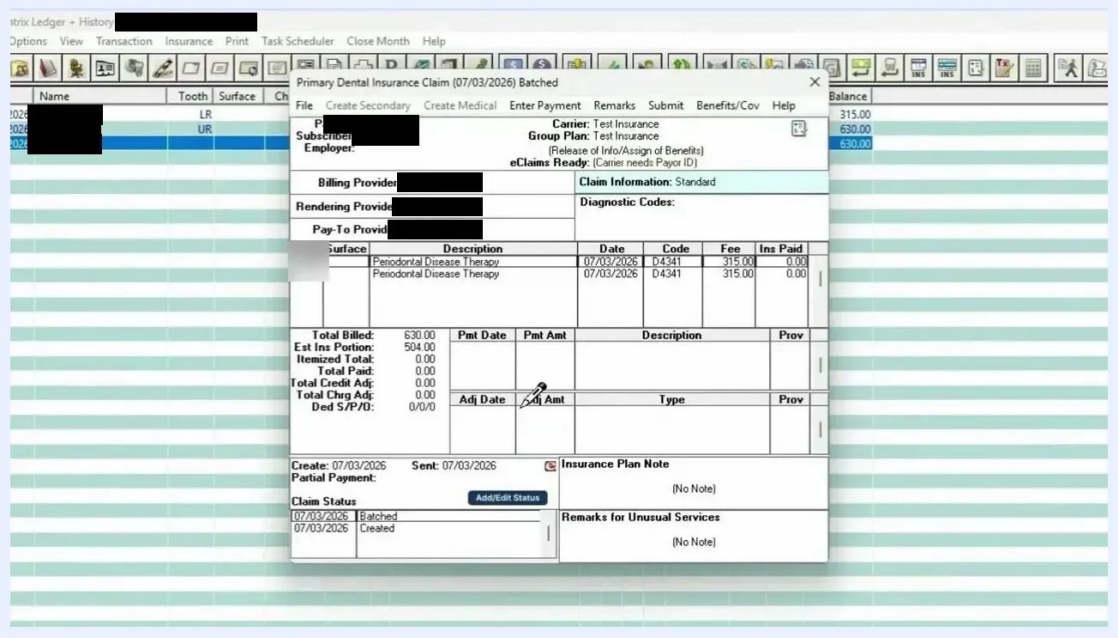
4. Specify how many attachments you are including

In the Insurance Claim Information dialog, find the **Attachments** section. Enter the number of each attachment type you are including.

For example, if you are attaching two radiographs, two intraoral photos, and one perio chart, set the fields as follows:

- **Radiograph(s) Enclosed**: 2
- **Oral Image(s) Enclosed**: 2

- **Other Attachment(s)**: 1

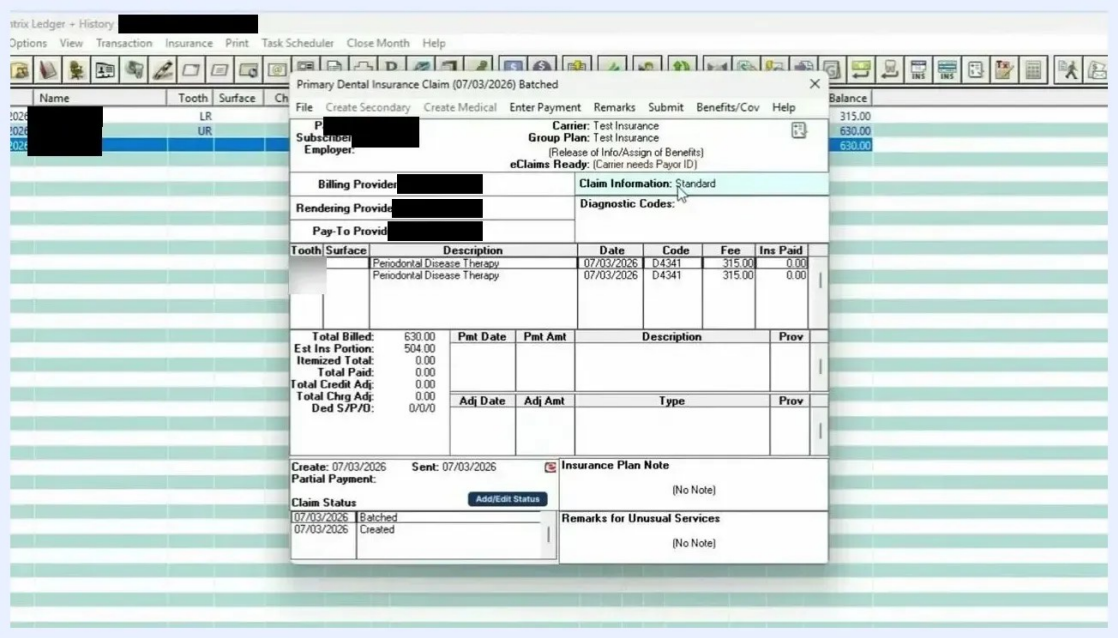


Insurance Claim Information dialog with the attachment fields filled in: Radiographs 2, Oral Images 2, Other Attachments 1

Attach X-rays and other files to the claim

5. Open the Include Attachments window

Click the **Include Attachment(s)** button. A new screen opens where you attach the actual files to the claim.



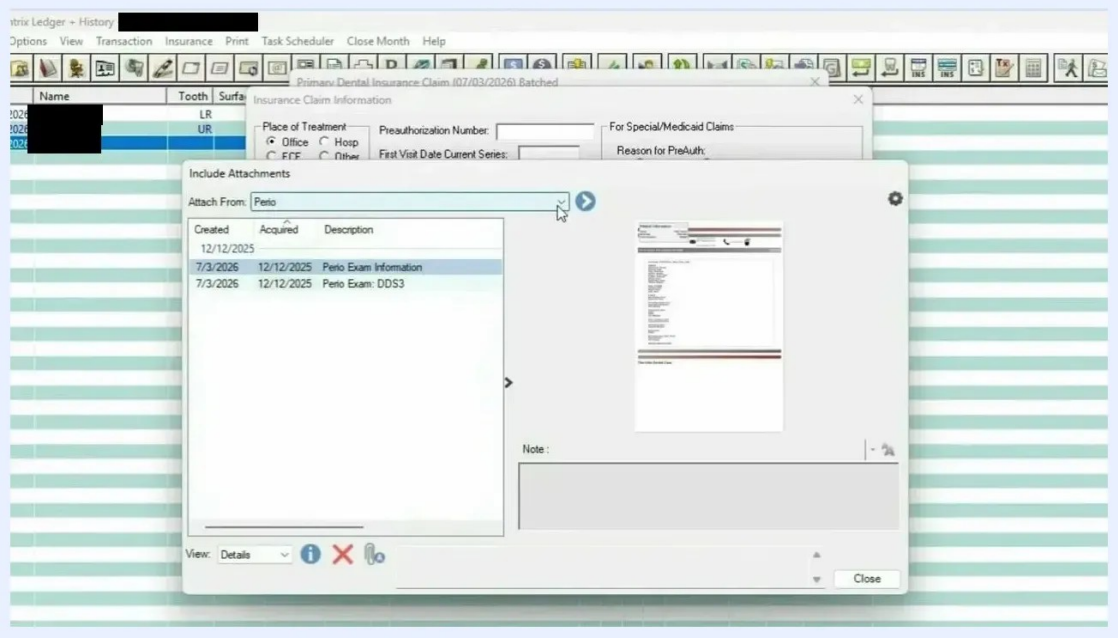
Insurance Claim Information dialog with the Include Attachment(s) button highlighted

6. Attach a perio chart

Follow these steps in the **Include Attachments** window:

1. Click the **Attach From** dropdown menu.
2. Select **Perio** from the list of sources.
3. In the list of perio exams, select the exam you want to attach, for example "Perio Exam Information" dated 7/3/2026.
4. Click **OK**.

Confirm that the perio chart now appears in the list of attached items.



Include Attachments window with Attach From set to Perio and a perio exam highlighted

7. Attach X-rays to the insurance claim in Dentrix

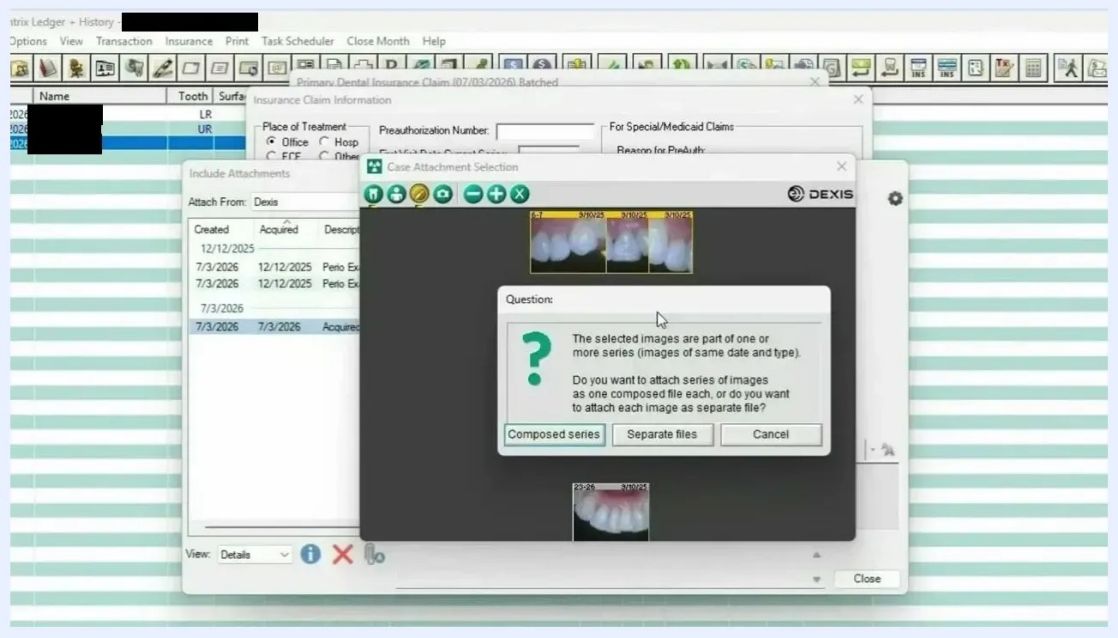
Return to the **Attach From** dropdown menu and select the imaging source for your radiographs. For example, choose **Dexis**, **Smart Image** if your office uses it, or another integrated imaging system.

If your images are stored elsewhere, select **File Acquire** to upload from your computer. Select **Document Center** to pull from Dentrix's document storage.

If you use Dexis, follow these steps:

1. Select **Dexis** from the dropdown.
2. Choose the X-ray image from the list.

3. Click the plus (+) sign to add the image as an attachment.

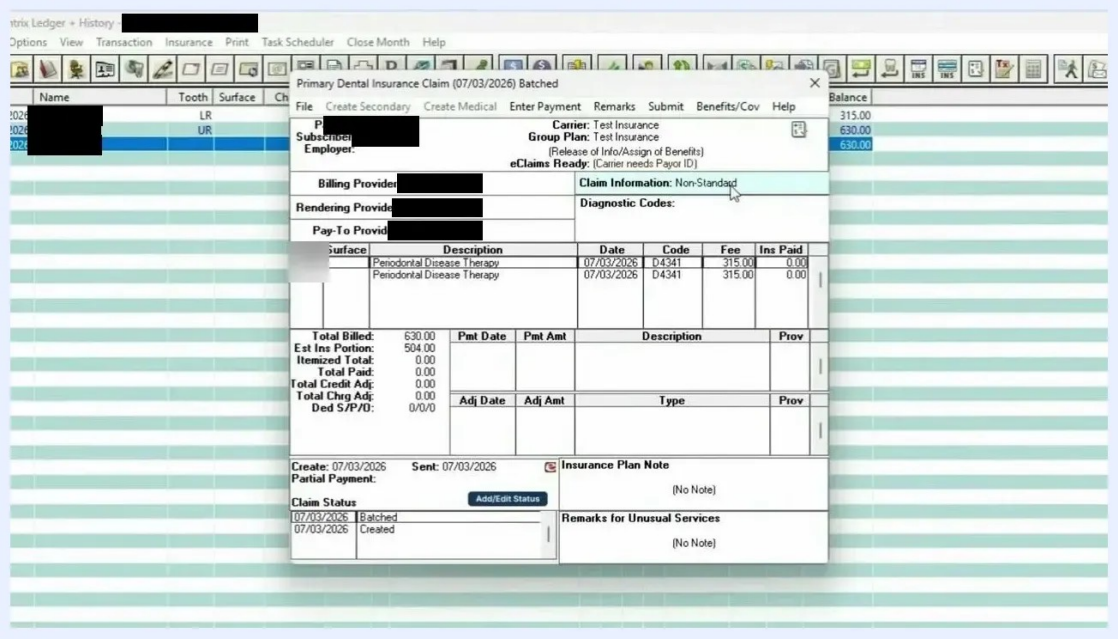


Include Attachments window with Attach From set to Dexis and a radiograph previewed for attachment

8. Attach intraoral photos

With Dexis (or your imaging software) open, switch to the intraoral photos. Select all the photos you want to send, then click the **Add** button (plus sign).

If you select more than one image, a prompt asks whether to attach them as **Separate files** or as a **Composed series**. In most cases, select **Separate files** so each image is attached individually.



Dexis Case Attachment Selection dialog prompting you to choose Composed series or Separate files for multiple images

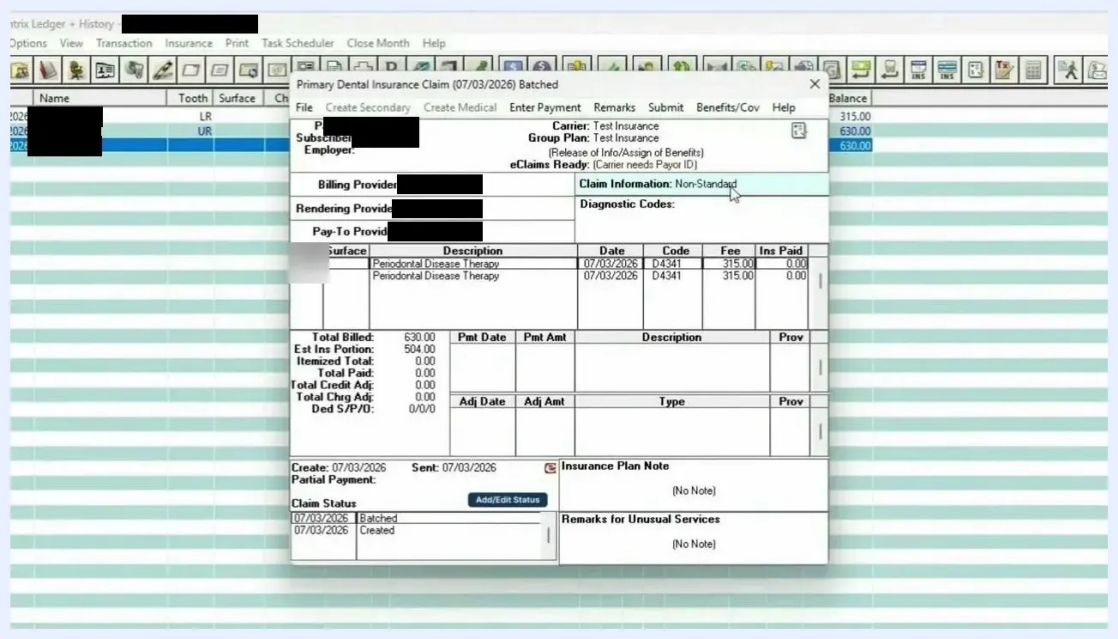
9. Review the attachments and close the window

Review the list of attached items in the **Include Attachments** window. Click through each attachment to verify it is correct. When all necessary attachments are included, click **Close**.

Confirm and submit the claim

10. Confirm the attachments on the claim

Back in the Primary Dental Insurance Claim window, check that the **Claim Information** field now displays **Non-Standard**. This indicates the attachments were added to the claim.



Primary Dental Insurance Claim window showing Claim Information set to Non-Standard, indicating attachments are present

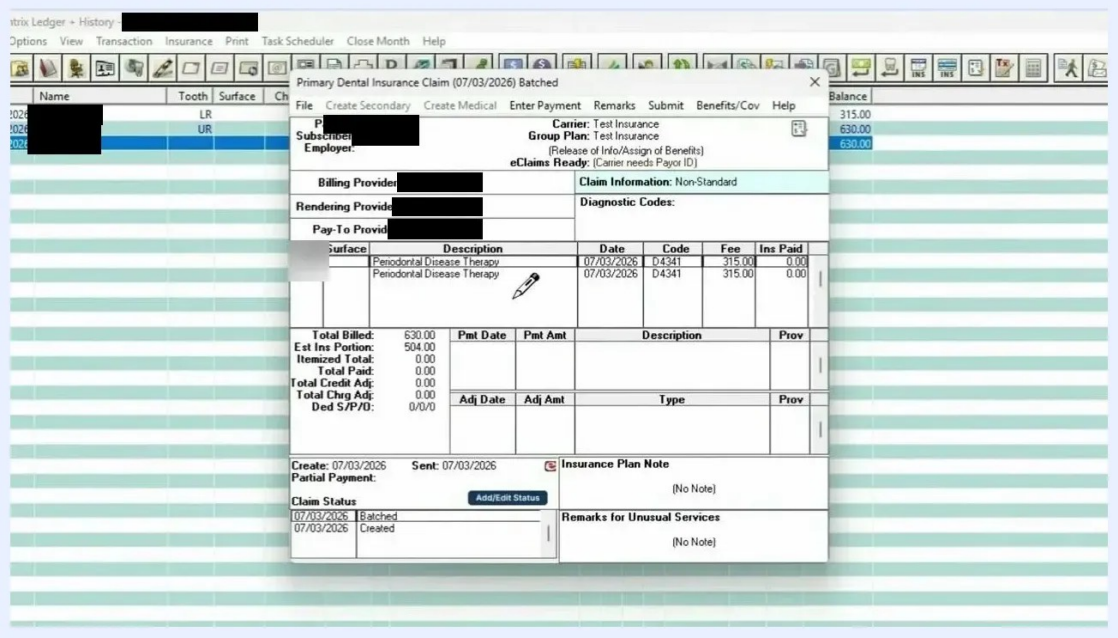
Before you submit, make sure all required documentation is attached, such as perio charts, radiographs, intraoral photos, and narratives. Complete claims with all necessary attachments are more likely to be approved and paid promptly.

11. Choose a submission method

Locate the top toolbar in the Primary Dental Insurance Claim window and choose how to submit the claim:

- Click **Submit** to send the claim immediately.
- Click **Batch** to add the claim to the batch processor for later submission.
- Select **Send Electronically** to transmit the claim via eClaims, if configured.
- Click **Print** to generate a paper claim for mailing.

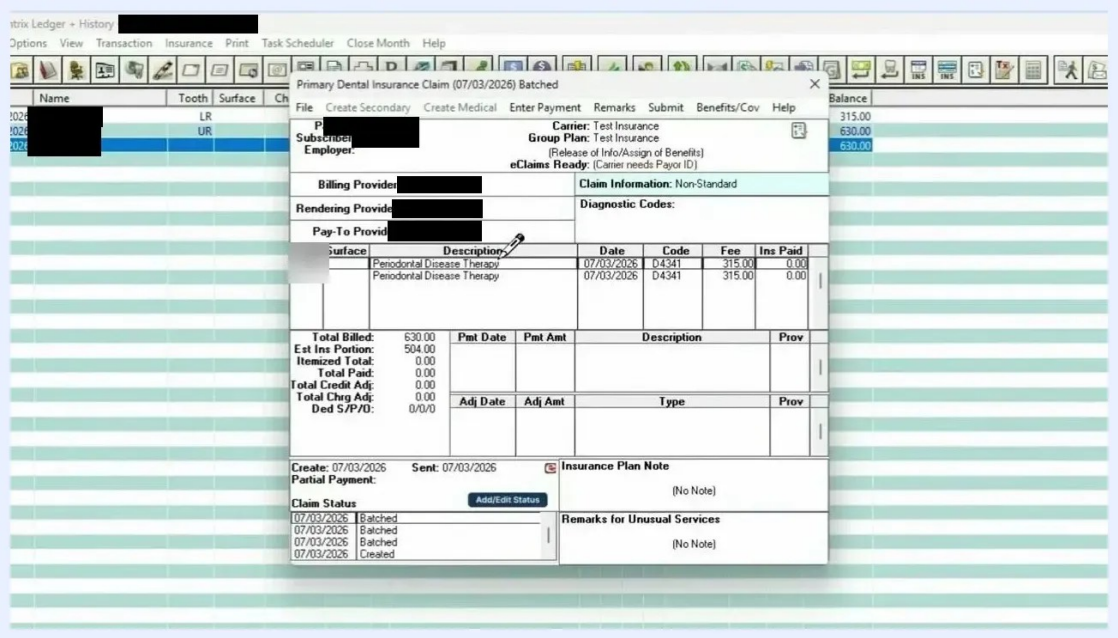
In this example, click **Batch** to add the claim to the batch processor.



Primary Dental Insurance Claim window toolbar with options to submit, batch, or print the claim; the claim is ready to be batched

12. Verify the attachment status

After batching, review the claim in the Primary Dental Insurance Claim window. Confirm that an "A" icon appears next to the claim, which indicates the attachments are included. The claim status should display as **Batched**.



Primary Dental Insurance Claim window showing the "A" icon next to the claim, indicating attachments are present

Send the claim from the Batch Processor

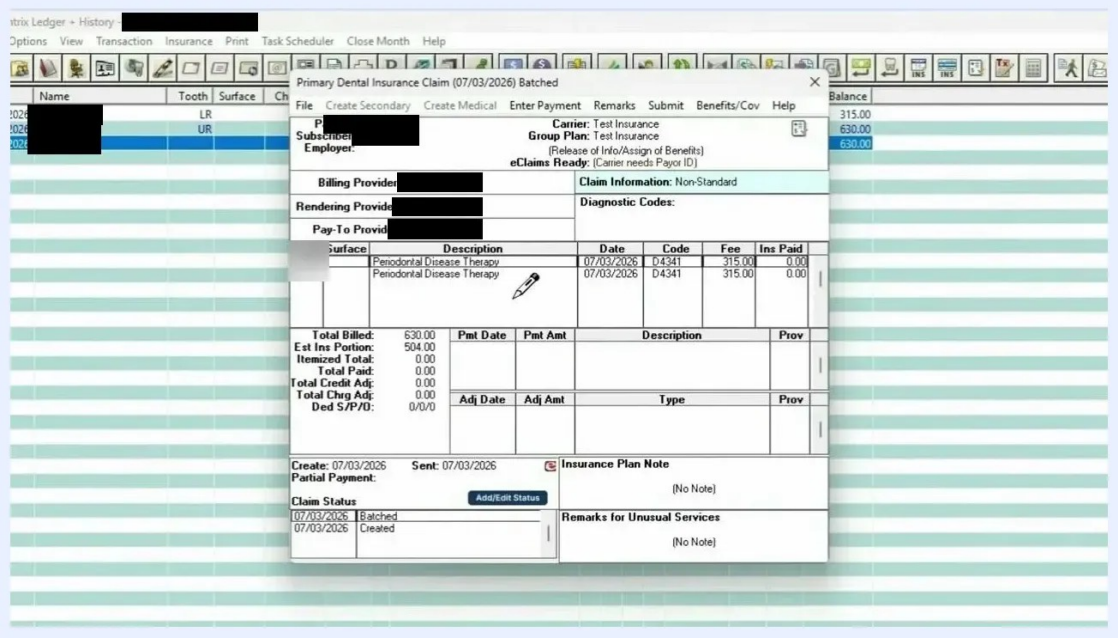
13. Review the claim and attachments in the Batch Processor

Open the Batch Processor window (Dentrix Office Manager) and locate your claim. Its description includes "<A>" to indicate attachments.

You see two entries:

- The primary dental insurance claim, with "<A>" in the description.
- A separate entry for the attachments, labeled "Attachment(s) for [Patient], [Insurance]".

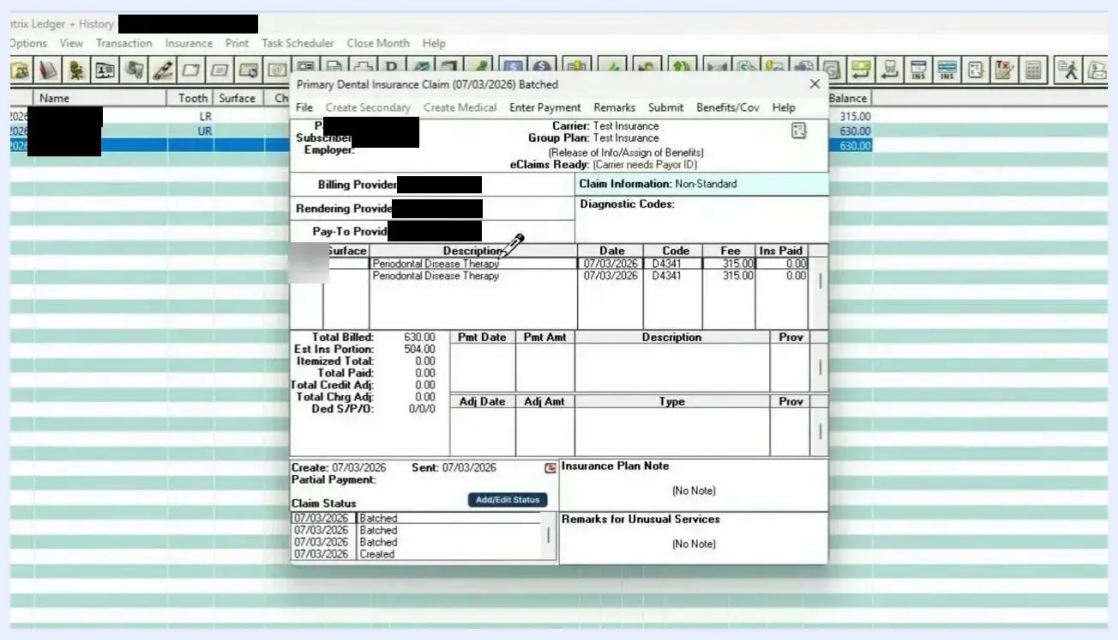
Both entries show a status of **Not Sent** until you process them.



Batch Processor window showing the claim with "<A>" and the separate attachments entry, both marked Not Sent

14. Submit the batched claims

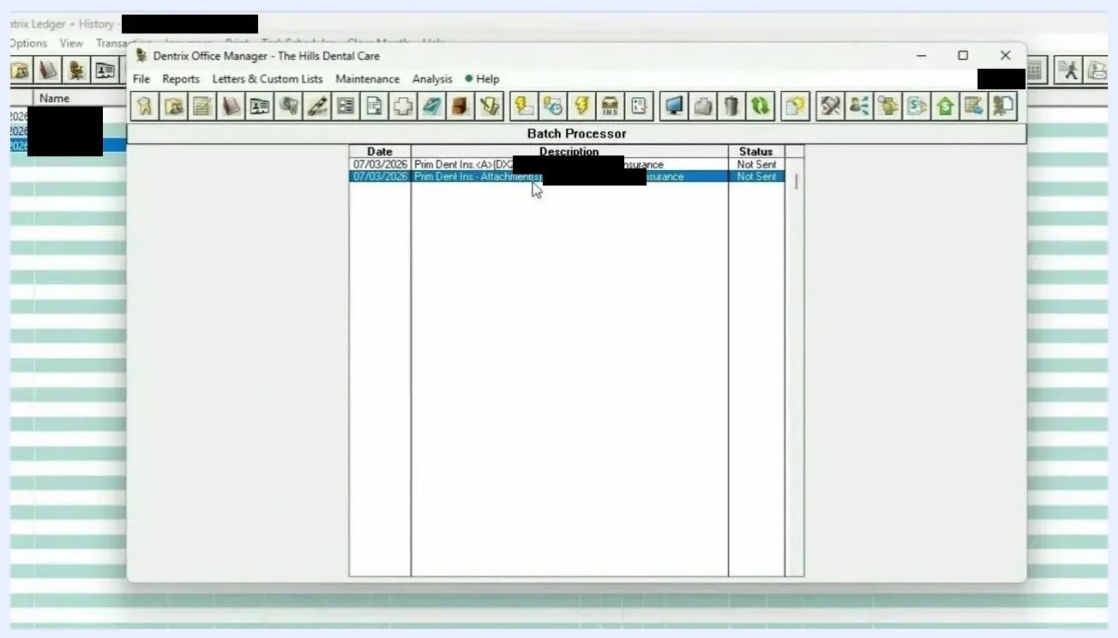
In the Batch Processor, select all the claims and attachments you want to submit. Click the appropriate button to send the selected items electronically, or process them according to your office's workflow, for example at the end of the day. You can submit all claims at once or individually, depending on your office's preference.



Batch Processor window with claims and attachments selected and ready for submission, both marked Not Sent

15. Confirm the attachment submission

Once submitted, the insurance company receives both the claim and all the attached documentation. This gives the carrier everything it needs to process the claim efficiently.



Batch Processor window confirming the claims and attachments are included for submission

Summary

You now know how to attach X-rays to an insurance claim in Dentrix. You opened the claim from the ledger, entered the attachment counts, and attached perio charts, radiographs, and intraoral photos. You then batched the claim and sent it with its attachments from the Batch Processor. Perio charts, radiographs, intraoral photos, and other documentation are now attached, which streamlines review and approval for the carrier.

What's next

- Check the Batch Processor to confirm that the claim and its attachments change from **Not Sent** after you process them.
- Repeat these steps for each claim that needs supporting documentation before you submit it.