How to post procedures in the Dentrix ledger

Learning how to post procedures in the Dentrix ledger helps you keep each patient's charges accurate. This guide shows you how to add procedures directly to the ledger and how to use multi-codes to add several at once. It also covers entering a credit adjustment, adding sales tax, posting a patient payment, and checking the finished ledger.

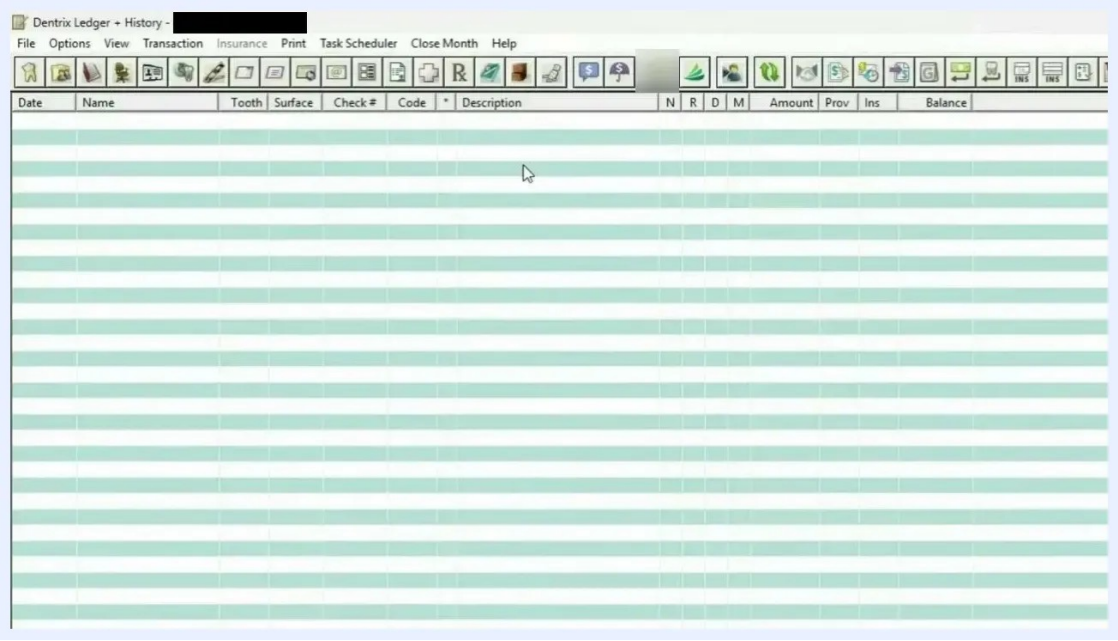
Prerequisites

- Open the correct patient's ledger before you make any entries.
- Know the procedure code you want to post, or be ready to search for it by category or name.

Open the patient's ledger

1. Confirm you are in the correct patient's ledger

The ledger screen shows these columns: Date, Name, Tooth, Surface, Check #, Code, Description, Amount, Provider, Insurance, and Balance. The top menu includes File, Options, View, Transaction, Insurance, Print, Task Scheduler, Close Month, and Help. Toolbar icons give you quick access to common actions.



The Dentrix Ledger screen with its column headings and toolbar icons

Post procedures in the ledger

Procedures usually post automatically from the appointment book when you mark an appointment complete. If something changes after posting, you can add or edit procedures directly in the ledger.

2. Open the Enter Procedure(s) dialog

Go to **Transaction > Enter Procedure**. You can also click the tooth icon with an arrow labeled "Enter Procedure" on the toolbar. The **Enter Procedure(s)** dialog opens.

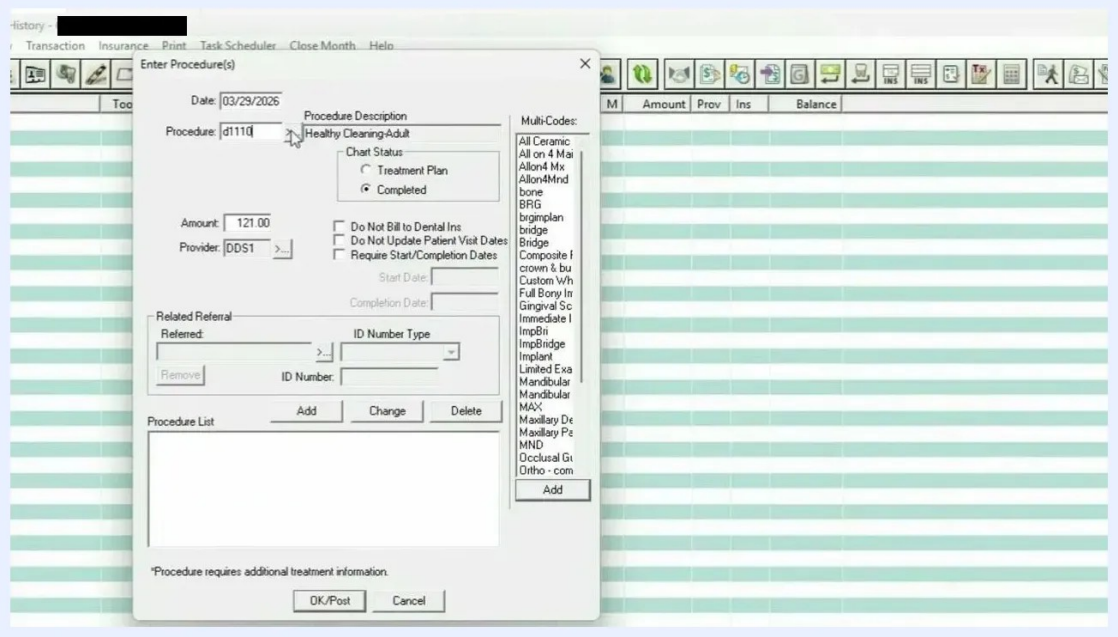
3. Enter the procedure details

If you know the dental code, type it into the **Procedure** field (for example, d1110). The description (for example, Healthy Cleaning-Adult) and the amount (for example, 121.00) fill in automatically.

Complete the remaining fields:

- **Date:** Confirm or adjust the procedure date.
- **Provider:** Select the provider (for example, DDS1).
- **Chart Status:** Choose **Treatment Plan** or **Completed**.

If you don't know the code, click the arrow next to the **Procedure** field to browse all available codes.

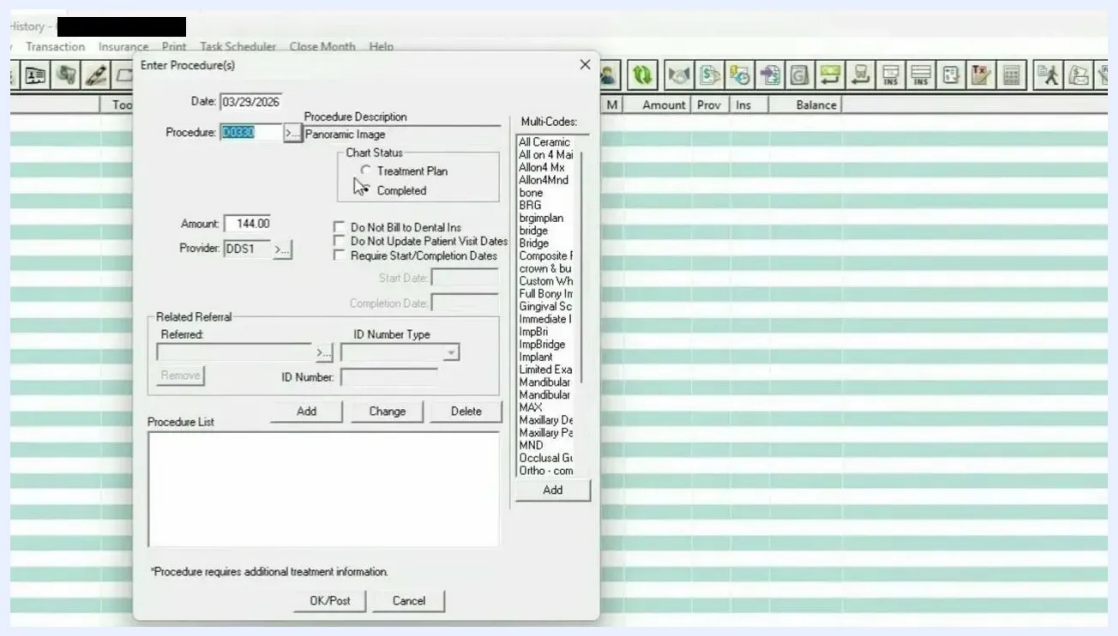


The Enter Procedure(s) dialog with the Date, Procedure, Description, Amount, Provider, and Chart Status fields filled in

4. Search for and select a procedure code

Click the arrow next to the **Procedure** field to open the **Select Procedure Code** dialog. You can browse by category, such as Diagnostic, Preventive, or Restorative. You can also type part of the procedure name or code in the search bar.

For example, to add a panoramic x-ray, type part of the name or code, select **D0330 Panoramic Image**, and click **OK**.



The Select Procedure Code dialog showing categories, ADA codes, descriptions, and the search bar

5. Confirm the procedure details

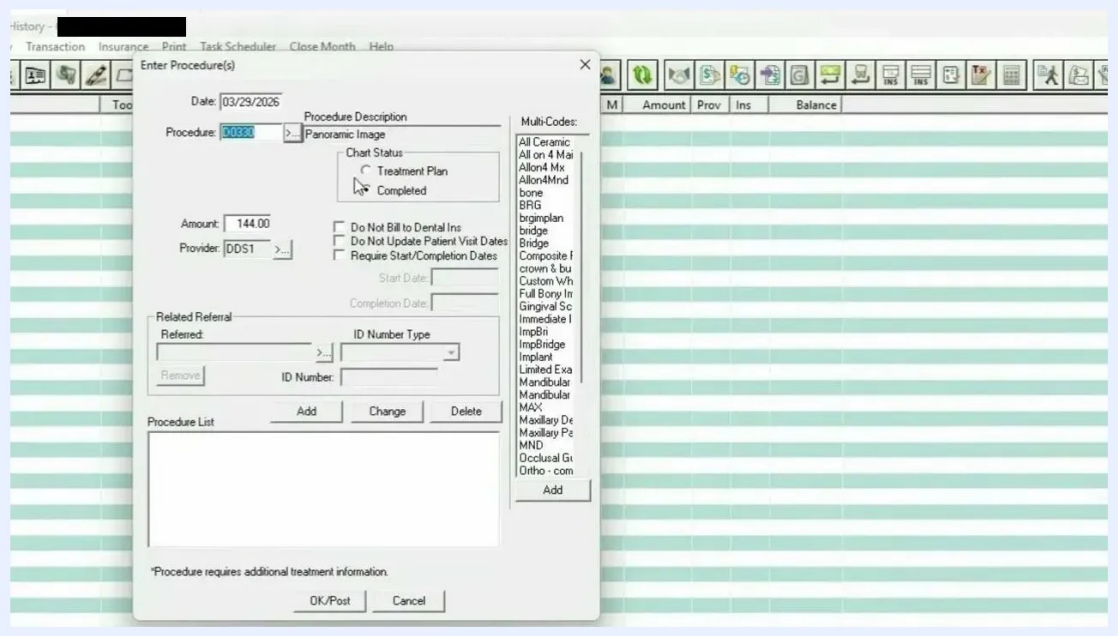
Check that the **Procedure** field shows your code (for example, D0330). The **Procedure Description** and **Amount** (for example, 144.00) fill in automatically.

The **Provider** defaults to the patient's primary provider (for example, DDS1). To change it, click the arrow next to the provider field and choose another provider.

Set the **Chart Status**:

- Select **Completed** to post the procedure as finished.

- Select **Treatment Plan** if you are planning the procedure rather than posting it.



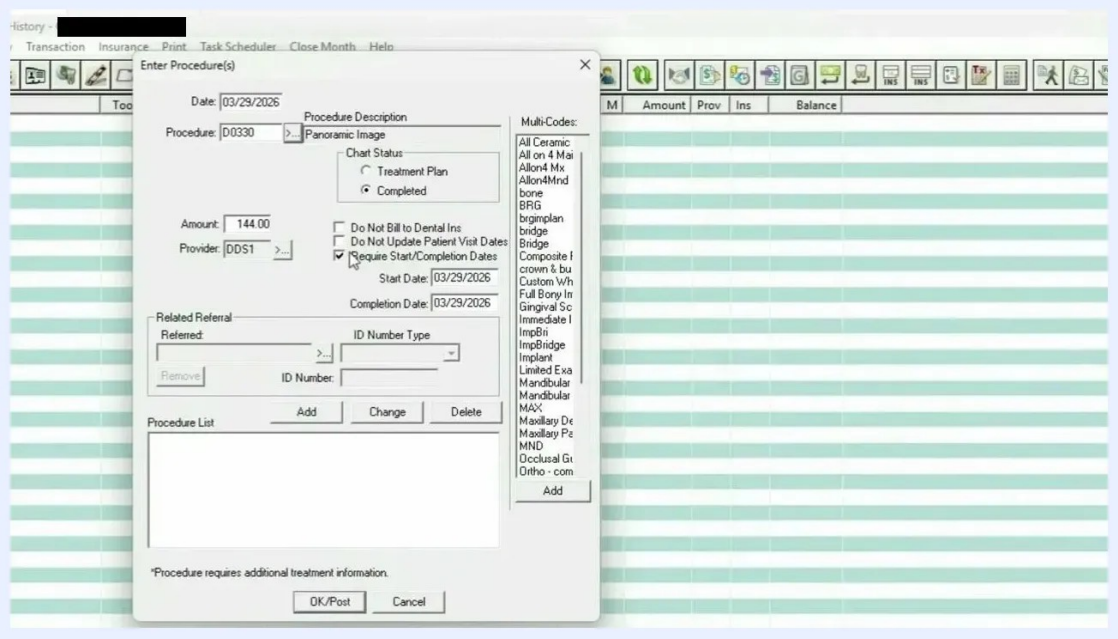
The Enter Procedure(s) dialog with D0330 Panoramic Image, the Chart Status options, an amount of 144.00, and the multi-codes list

6. Adjust billing and visit date options

Use the checkboxes in the dialog when you need them:

- **Do Not Bill to Dental Ins:** Check this box if you don't want the procedure billed to insurance.
- **Do Not Update Patient Visit Dates:** Check this box if you don't want the procedure to update the patient's visit or continuing care dates.

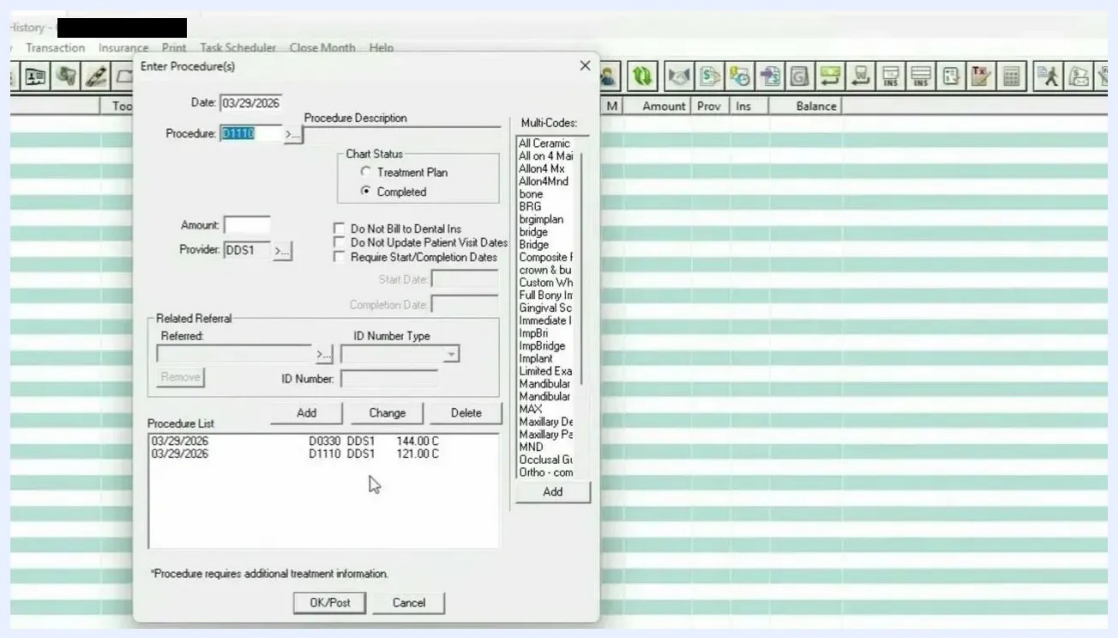
- **Require Start/Completion Dates:** Check this box if the procedure needs separate start and completion dates, such as crowns or multi-visit treatments. Enter the dates in the fields provided.



The three billing and visit date checkboxes in the Enter Procedure(s) dialog, with dates filled in

7. Add the procedure to the list

Click **Add** to move the procedure into the **Procedure List** at the bottom of the window. The list shows the date, code, provider, amount, and status. For example: 03/29/2026, D0330, DDS1, 144.00, C for completed.



The Procedure List showing D0330 Panoramic Image and D1110 Healthy Cleaning-Adult, both with provider DDS1

8. Add more procedures

To add another procedure, such as a prophy or cleaning, repeat the search and selection steps. Confirm the amount and provider for each new procedure. Click **Add** after each one to build a list of all completed procedures for the visit.

9. Add a group of procedures with a multi-code

Multi-codes let you add common groups of procedures with one action:

1. In the **Enter Procedure(s)** window, find the **Multi-Codes** panel on the right.
2. Click the multi-code you want (for example, "Maxillary Denture").
3. Click **Add** to insert all associated procedures into the **Procedure List**.

10. Review the procedures in the list

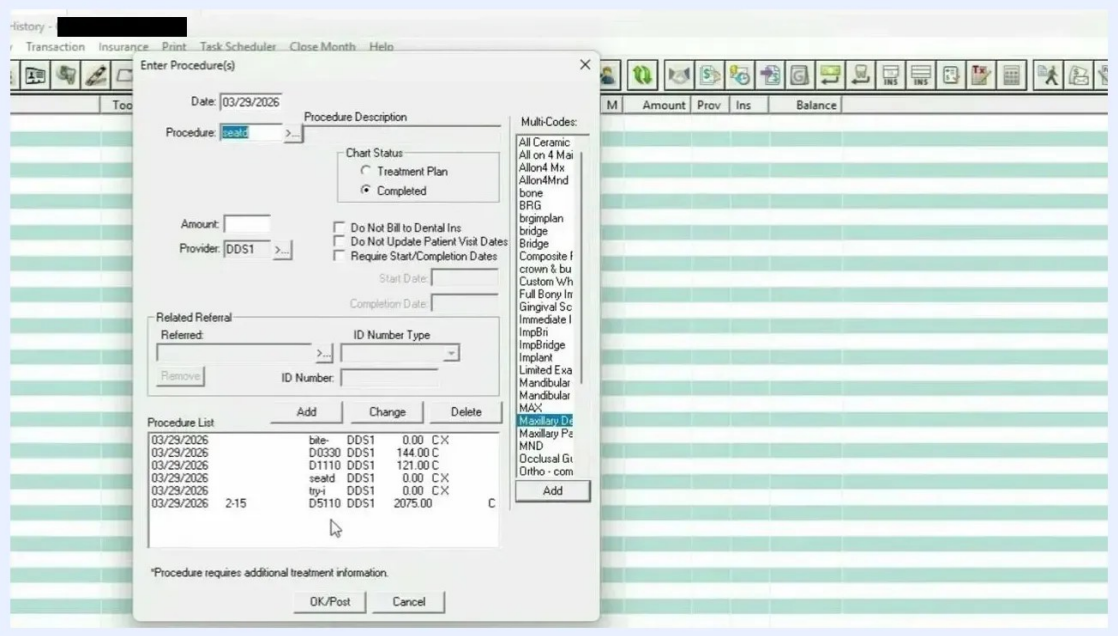
Confirm that every procedure associated with the multi-code appears in the **Procedure List**. Each one shows its date, code, provider, and amount. Make any adjustments to individual procedures if needed.

11. Post the procedures to the ledger

When all procedures are in the **Procedure List**, click **OK/Post** to save them and post them to the patient's ledger.

12. Verify the ledger update

After posting, the bottom of the ledger shows a running balance and today's charges. In this example, **Family Balance** and **Today's Charges** both show $2,340.00, with no insurance adjustments.



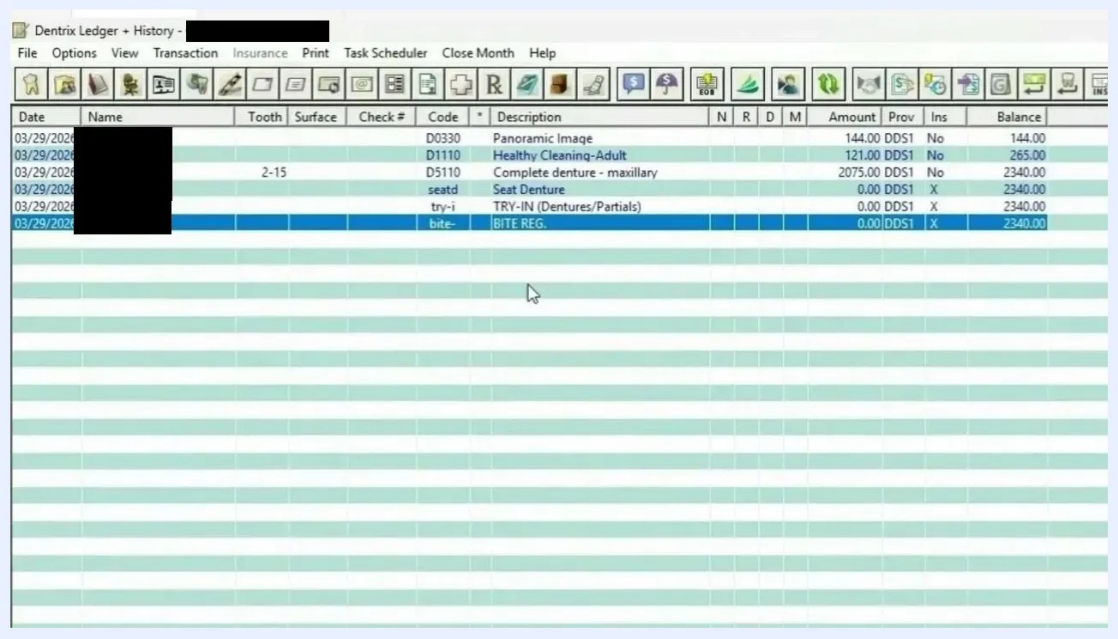
The ledger summary showing Family Balance $2,340.00 and Today's Charges $2,340.00

13. Confirm the posted procedures

The main ledger view now lists every posted procedure with its code, description, provider, and amount. Check that each one is present and correct. In this example, those are:

- D0330 Panoramic Image
- D1110 Healthy Cleaning-Adult
- D5110 Complete denture - maxillary

- seatd Seat Denture
- try-i TRY-IN
- bite- BITE REG.



The Dentrix Ledger listing all posted procedures with codes, descriptions, providers, and balances

Enter a credit adjustment

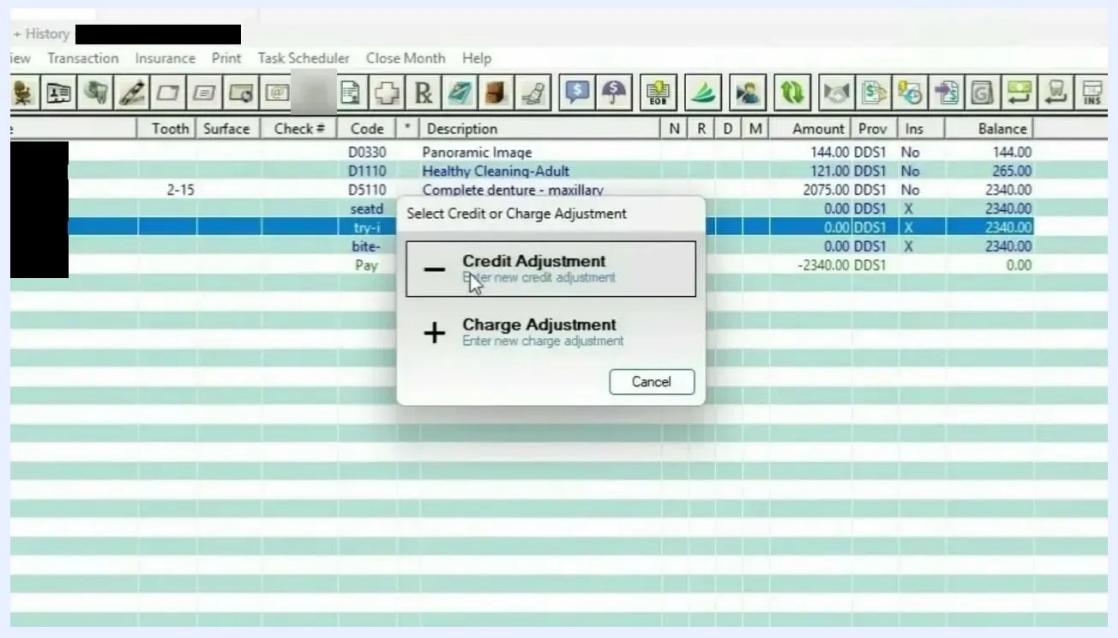
Ideally, post the adjustment before you post the payment so the balance calculates accurately.

14. Choose the adjustment type

Open the adjustment menu and select the type of adjustment:

- Click **Credit Adjustment** to enter a new credit adjustment, such as a write-off, discount, or courtesy.

- Click **Charge Adjustment** to enter a new charge adjustment.



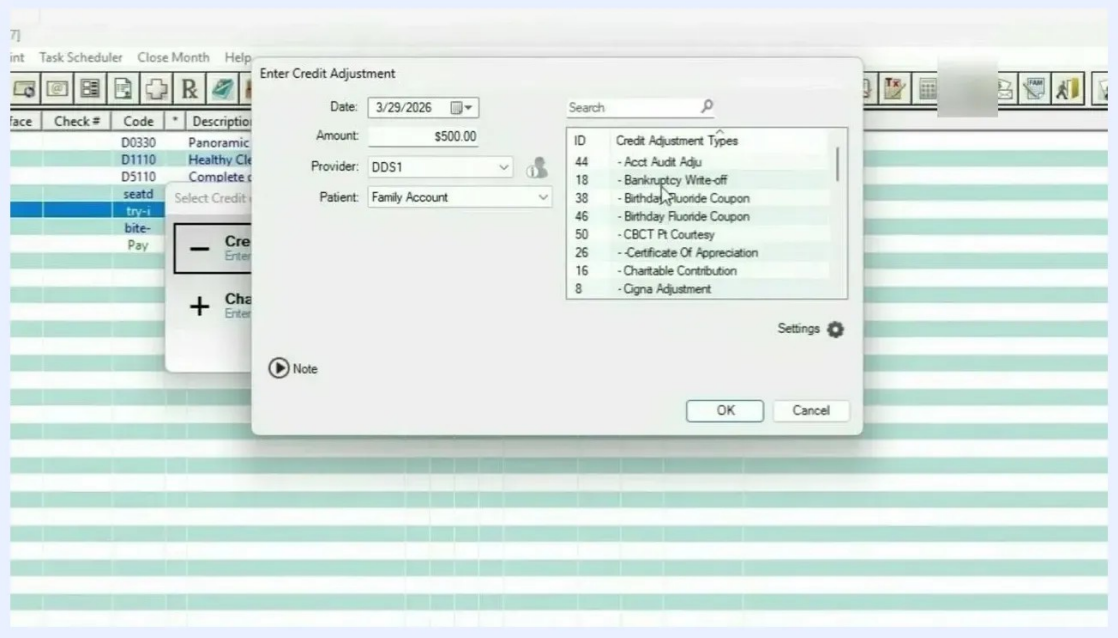
The adjustment selection options, Credit Adjustment and Charge Adjustment

15. Complete the Enter Credit Adjustment window

Review and confirm these fields:

- **Date:** 3/29/2026
- **Amount:** $500.00
- **Provider:** DDS1
- **Patient:** Family Account
- **Credit Adjustment Type:** CBCT Pt Courtesy, or another appropriate type such as Professional Courtesy

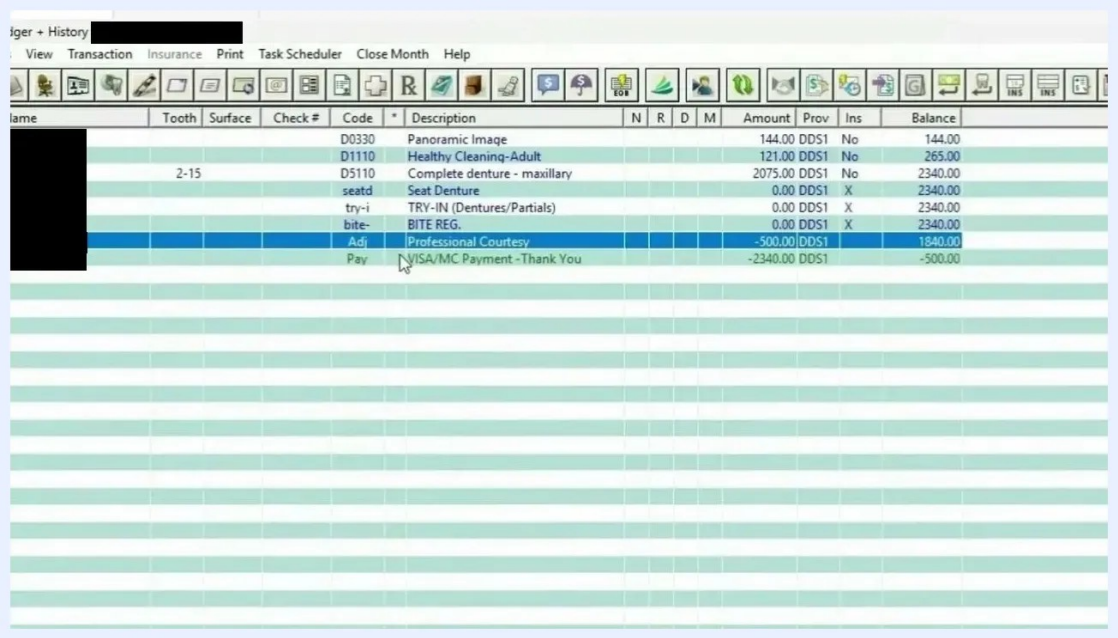
Use the search bar to find the adjustment type quickly.



The Enter Credit Adjustment window with the date, amount, provider, patient, and Credit Adjustment Types list

16. Choose a specific adjustment type for tracking

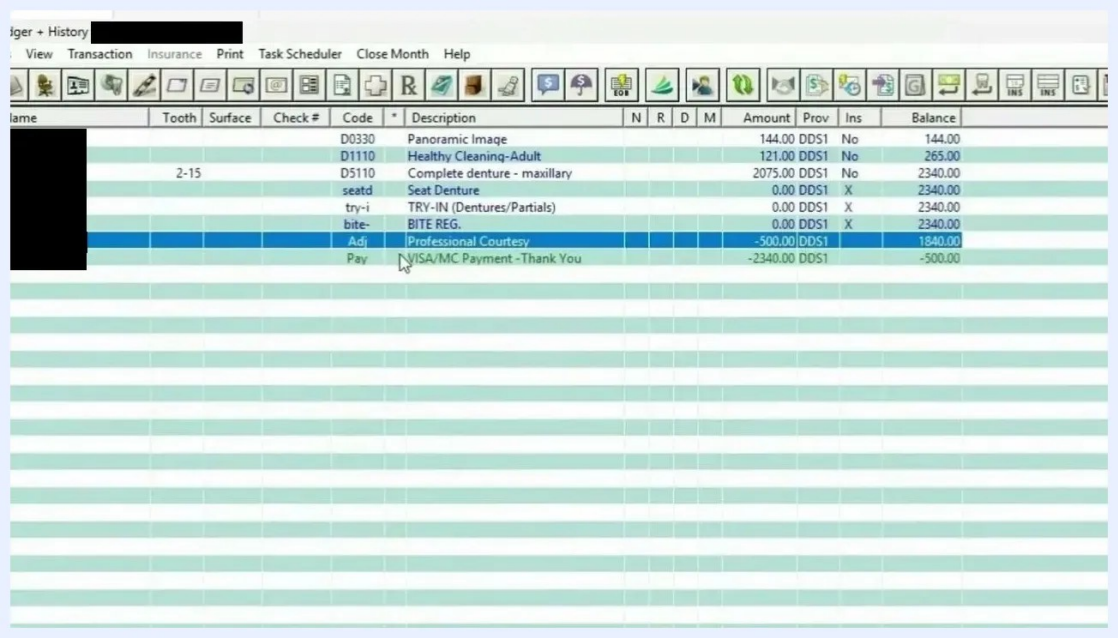
Specific adjustment types, such as Professional Courtesy, let you track how many times you adjust for friends or family during the year. This helps with year-end reporting and accountability.



The Enter Credit Adjustment window with the cursor on an adjustment type

17. Apply the adjustment

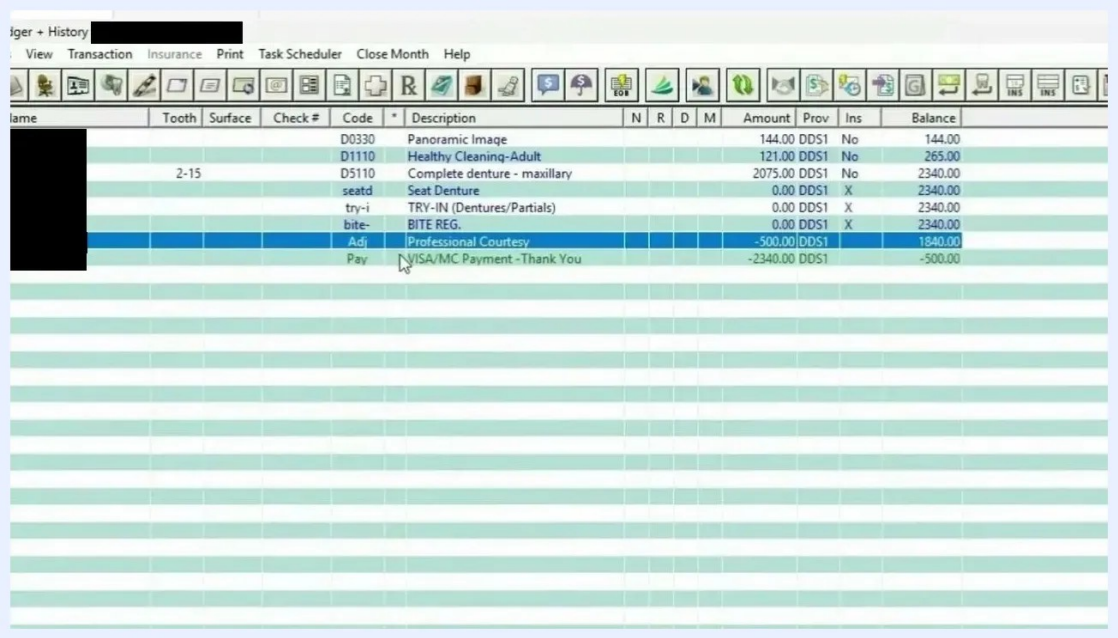
When all fields are correct and the right adjustment type is selected, click **OK**.



The Enter Credit Adjustment window with the OK button ready to click

18. Verify the adjustment in the ledger

The adjustment entry (for example, Professional Courtesy for -$500.00) appears in the transaction history. The balance updates accordingly. In this example, the new balance is $1840.00.



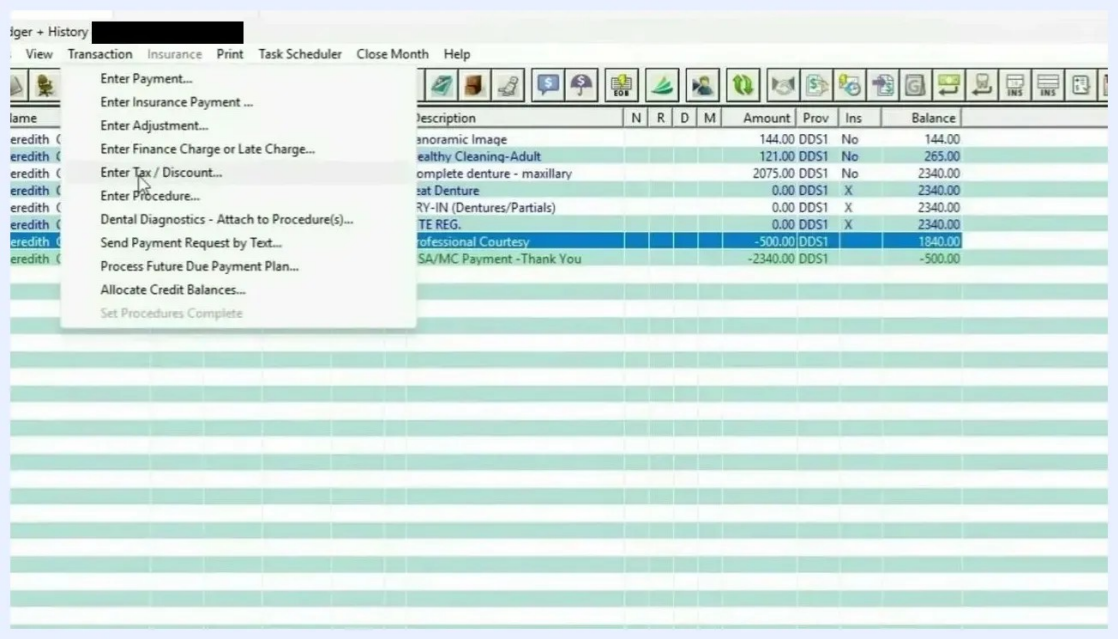
The patient ledger showing the Professional Courtesy adjustment and updated balances

Add sales tax

If the adjustment type requires the patient to pay tax, such as certain courtesy adjustments, add sales tax.

19. Open the Enter Tax / Discount window

Go to the **Transaction** menu and select **Enter Tax / Discount...**.



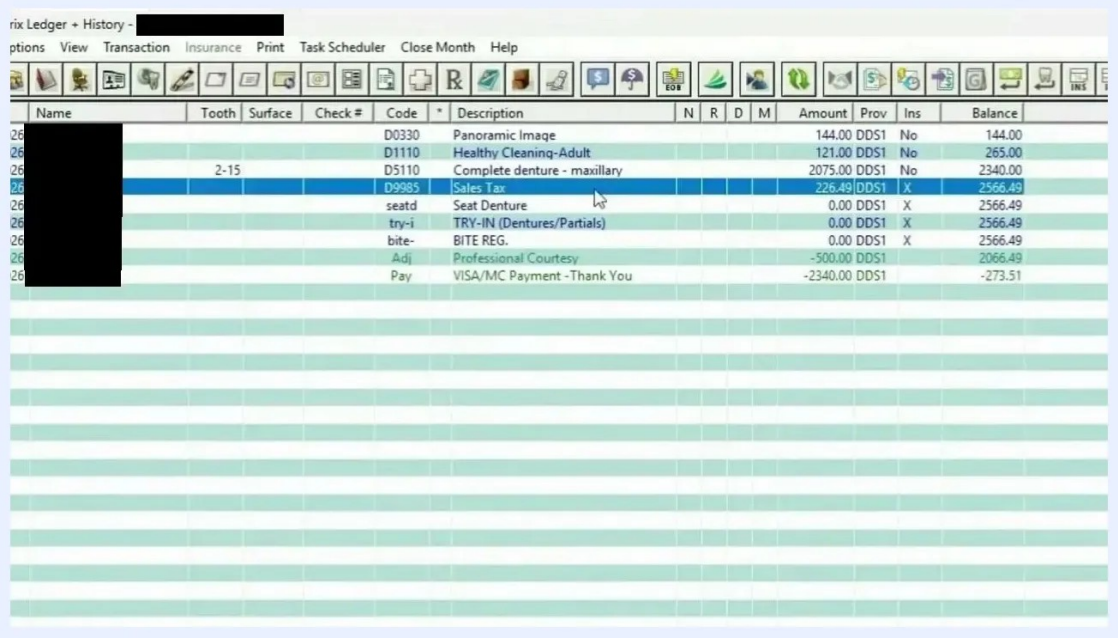
The Transaction menu expanded with Enter Tax / Discount highlighted

20. Complete the tax fields

In the **Enter Tax / Discount** window, set the following:

- **Date:** 3/29/2026
- **Calculate for:** Procedures Dated, with the date matching the procedure
- **Provider:** DDS1
- **Patient:** Family Account
- **Tax / Discount Type:** Sales Tax

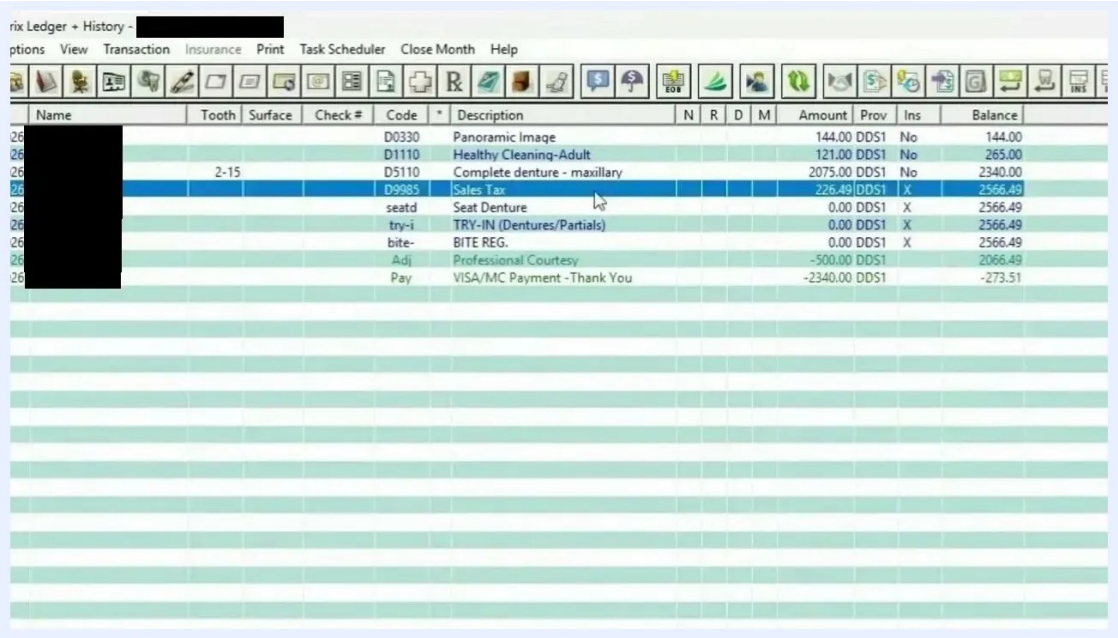
Click **OK** to apply the sales tax.



The Enter Tax / Discount window with Sales Tax selected

21. Confirm the sales tax entry

The ledger now shows a Sales Tax entry (for example, code D9985, amount $226.49). The balance updates to reflect the tax.



The patient ledger showing the Sales Tax entry and updated balances

Post a patient payment

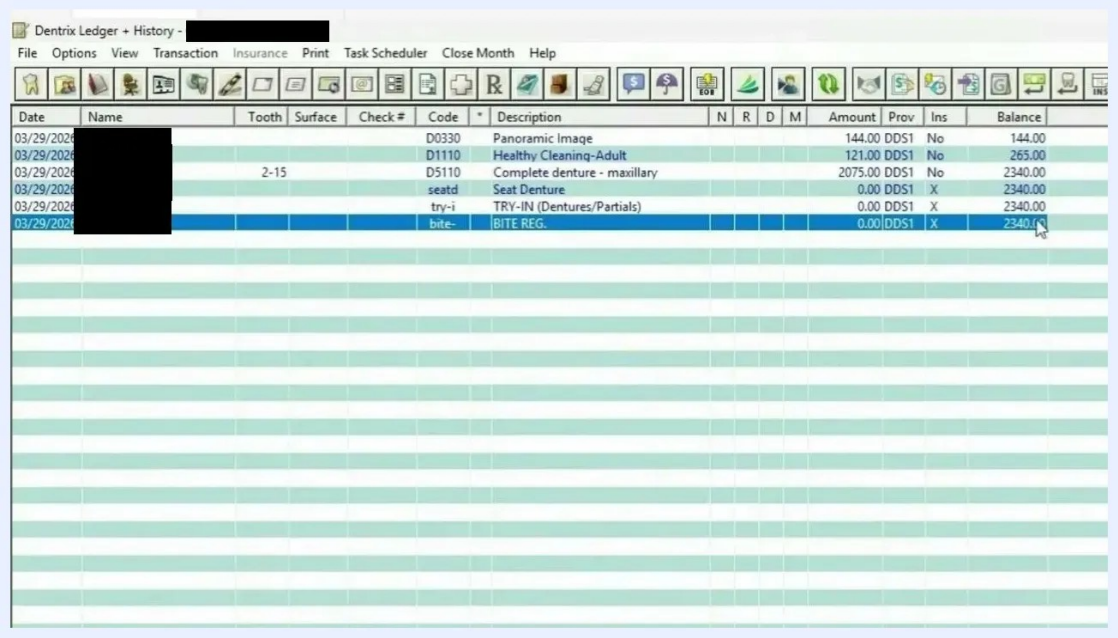
22. Open the Enter Payment window

Go to the **Transaction** menu and select **Enter Payment**. You can also click the dollar icon with an arrow labeled "Enter Payment" on the toolbar.

23. Enter the payment details

Complete the fields in the **Enter Payment** window:

- **Date:** This fills in with today's date (for example, 3/29/2026).
- **Amount:** Enter the payment amount (for example, 2340.00).
- **Check/Payment #** and **Bank/Branch #:** Enter these if the payment is by check.
- **Provider:** Make sure it shows the provider receiving the payment (for example, DDS1). Use the dropdown to choose another.
- **Patient:** Confirm it is correct (for example, Family Account).



The Enter Payment window with an amount of $2,340.00, the Provider dropdown open, and payment types listed

24. Choose how to post the payment

In the **Patient** dropdown, choose one of these options:

- **Family Account** posts the payment to the entire family.

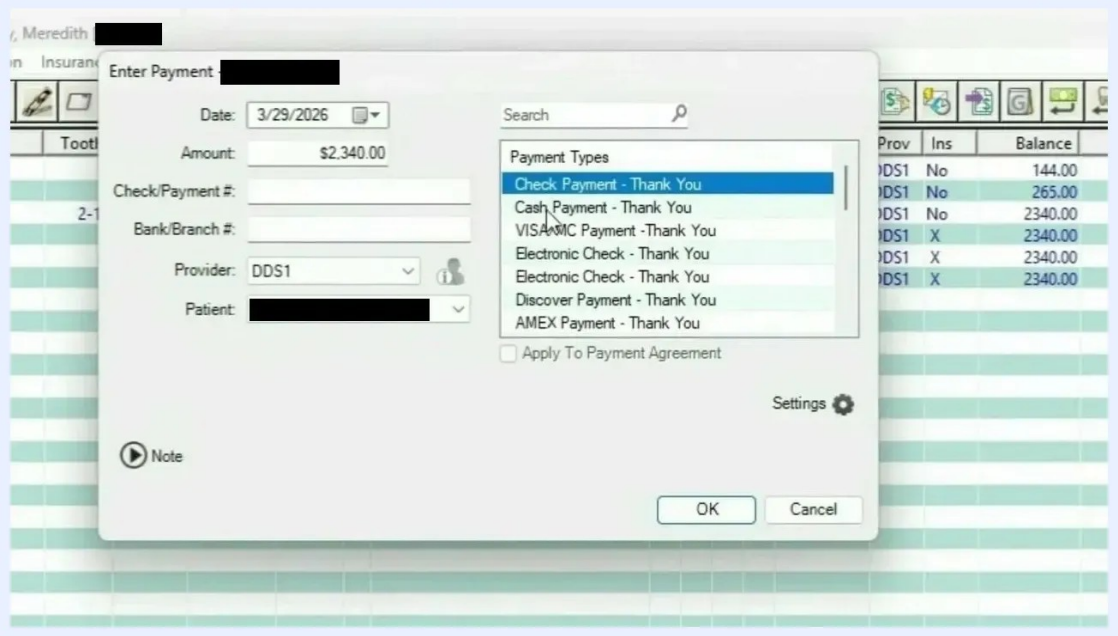
- An individual patient (for example, Grey, Meredith [GR0117]) posts it to that specific member.
- **Split By Family Members** divides the payment among multiple family members.

25. Select the payment type

In the **Payment Types** list, select the method the patient used. Options include:

- Check Payment - Thank You
- Cash Payment - Thank You
- VISA/MC Payment - Thank You
- Electronic Check - Thank You
- Discover Payment - Thank You
- AMEX Payment - Thank You

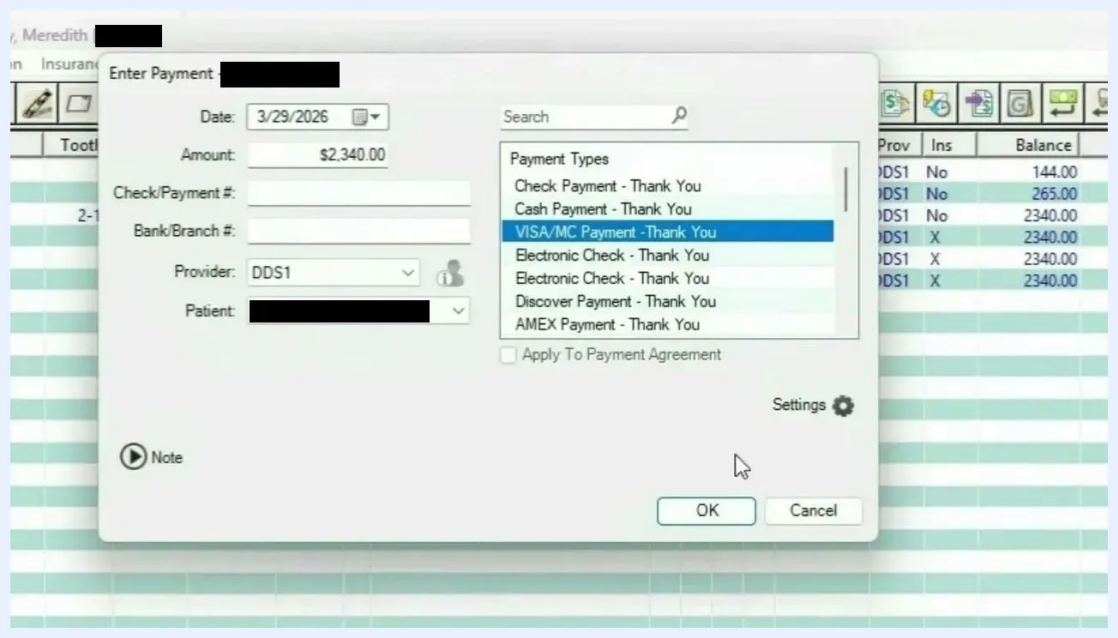
Choose the type that matches how the patient paid, such as cash, credit card, or check.



The Payment Types list showing the available payment methods

26. Check for the credit card icon

If you select a credit card payment type, such as VISA/MC Payment - Thank You, a credit card icon appears next to the payment type.

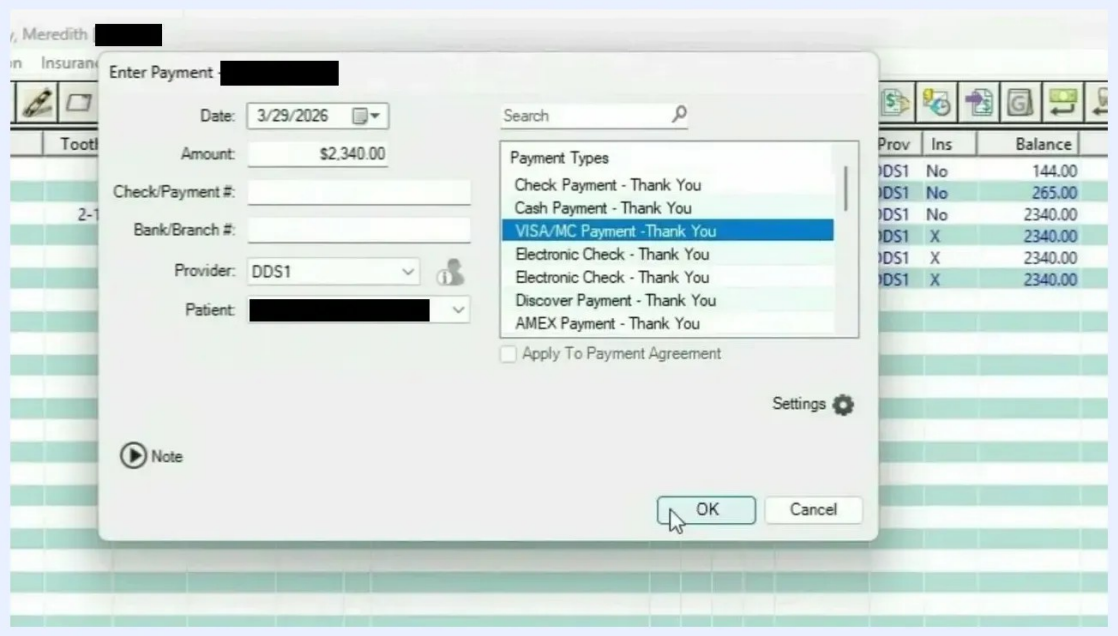


The Enter Payment window with VISA/MC Payment - Thank You selected and the credit card icon shown

27. Post the payment

Review all the information for accuracy. For a credit card payment type, the **OK** button may change to **Process Card** if integrated card processing is enabled. Otherwise, run the card through your credit card machine, then click **OK**.

For other payment types, click **OK** to post the payment to the patient's ledger.

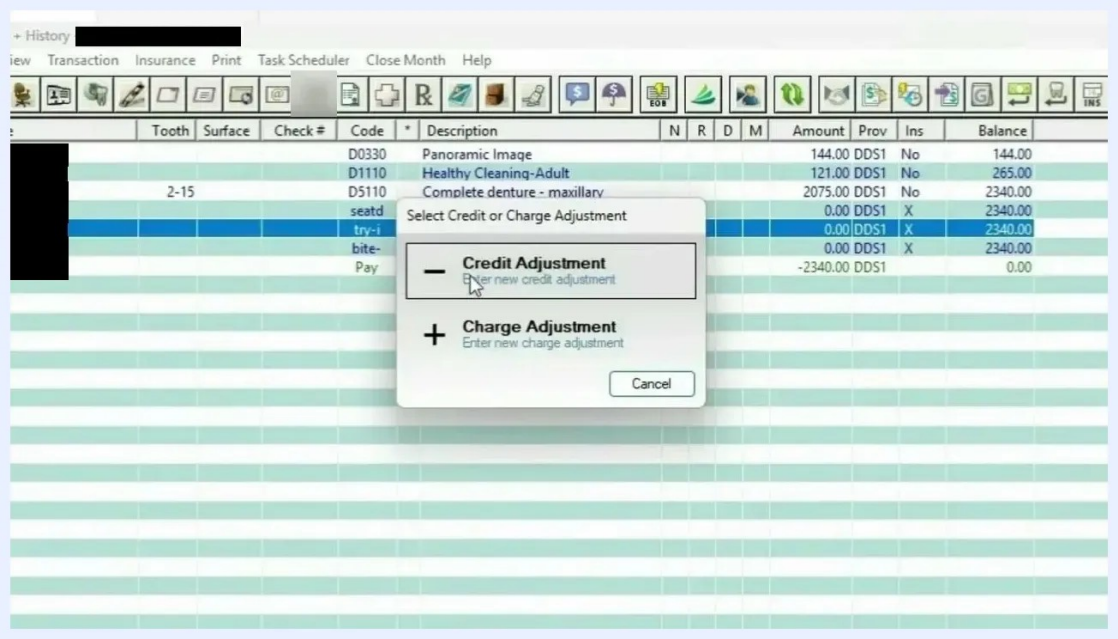


The Enter Payment window with VISA/MC Payment - Thank You selected and the cursor over the OK button

Verify the finished ledger

28. Confirm the payment in the transaction history

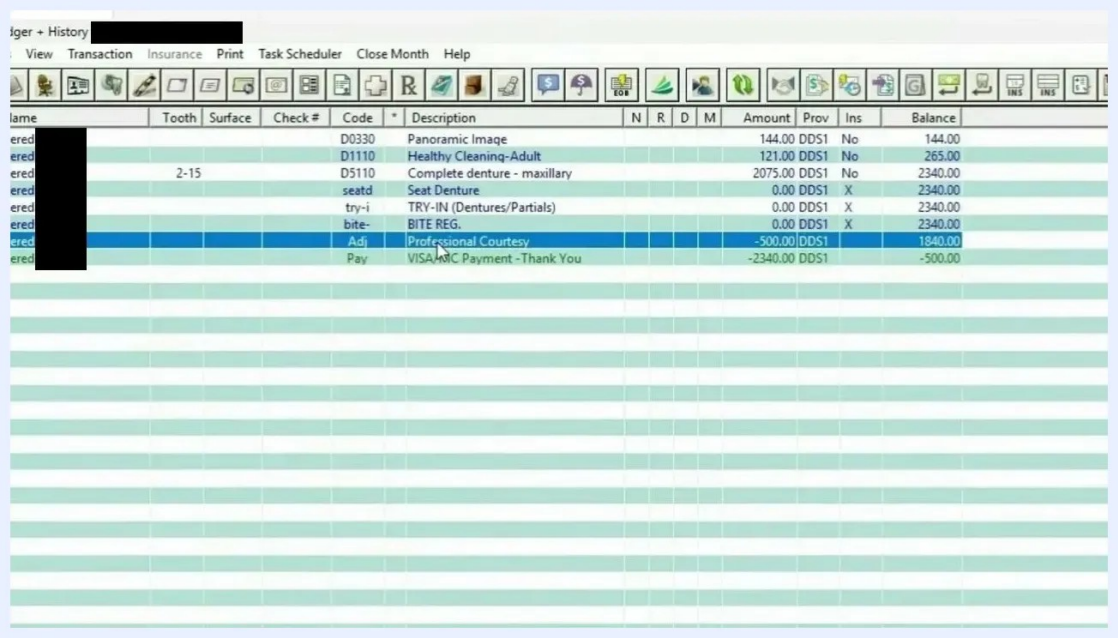
The payment entry (for example, VISA/MC Payment - Thank You) appears with the correct amount. The balance shows $0.00 if the account is paid in full.



The patient transaction history showing the payment entry and updated balance

29. Check that the balance is zero

After you post both the adjustment and the payment, confirm that the account balance is zero if all charges are settled.



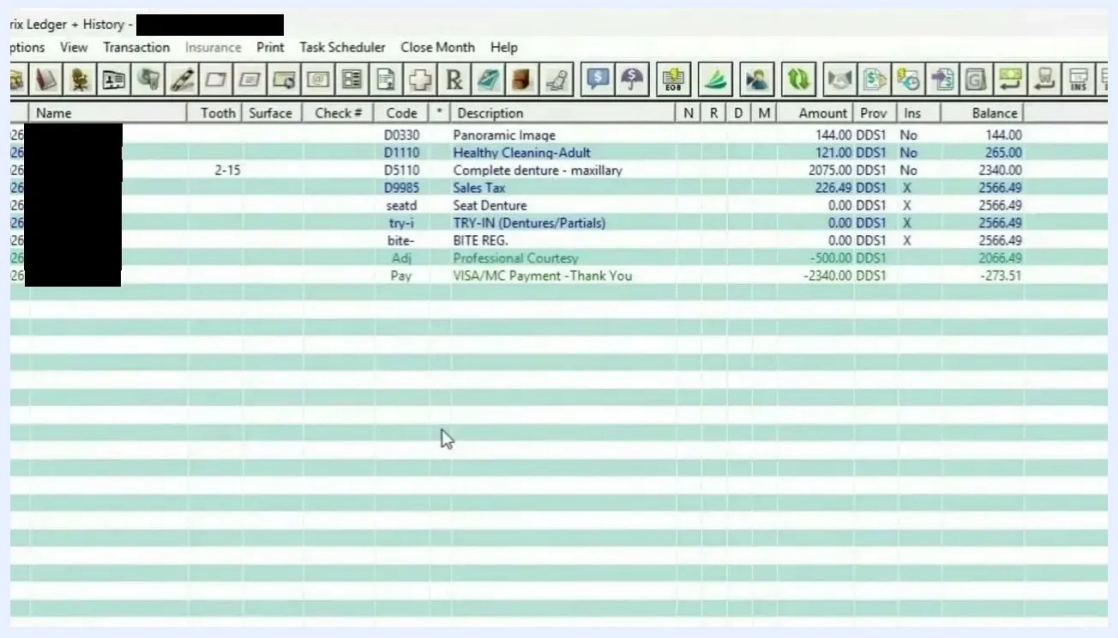
The patient ledger showing both the adjustment and payment, with the balance at zero

30. Review the completed ledger

Check that the ledger lists the following in chronological order:

- All procedures, adjustments, sales tax, and payments.
- The Professional Courtesy adjustment, the Sales Tax entry, and the final payment.
- The correct values in each column: Date, Name, Tooth, Surface, Check #, Code, Description, Amount, Provider, Insurance, and Balance.

Make sure the running balance updates correctly after each transaction.



The Dentrix Ledger showing all posted procedures, adjustments, sales tax, and payments with updated balances

Summary

You now know how to post procedures in the Dentrix ledger, either one at a time or with multi-codes. You also know how to post a credit adjustment, add sales tax, and post a patient payment. Reviewing the final ledger confirms that every charge and payment for the visit is recorded accurately.