

How to Split a Claim in Dentrrix

When some procedures on a primary claim have received payment while others remain outstanding, you need to know how to split a claim in Dentrrix so the unpaid procedures can be resubmitted to insurance separately. This guide walks you through identifying when splitting is possible, using the Split Claim dialog box, and finalizing the new claims in the Ledger.

Prerequisites

Before you split a claim, confirm the following:

- Some procedures on the claim have received payment, while others are still outstanding and require resubmission to insurance.
- You split the claim **before** posting any partial payment.

You **cannot split a claim** if:

- Payment has already been received and posted for that claim.
- The claim has been moved into history due to payment entry.
- A secondary claim has already been created for the primary claim.
- The claim is a pretreatment authorization.

Always check the claim status before attempting to split it.

Step 1: Copy any insurance claim notes

If the original claim has insurance claim notes attached, copy these notes before you begin the split. After splitting, you'll paste the copied notes into the new (second) claim so that all relevant information is retained.

Dentrix Ledger - Winters, Jamie [W0002]

Primary Dental Insurance Claim (12/19/2013) Sent

File - Create Secondary - Create Medical - Enter Payment - Remarks - Submit - Help

Patient: Winters, Jamie
Subscriber: Winters, Carl
Employer: Qwest
Carrier: Lincoln National
Group Plan: Qwest
eClaims Ready: (eClaims is not set up)

Billing Provider: Smith, Dennis
Rendering Provider: Smith, Dennis
Pay To Provider: Smith, Dennis

Claim Information: Standard
Diagnostic Codes:

Tooth Surface	Description	Date	Code	Fee	Ins Paid
19	Full Porcelain/Ceramic Crown	12/01/2013	D2740	1031.00	0.00
19	Core Buildup w/ Any Pins	12/01/2013	D2950	252.00	0.00
19	Root Canal Therapy on Molar	12/01/2013	D3330	830.00	0.00

Total Billed: 2213.00
Est. Ins. Portion: 1360.50
Itemized Total: 0.00
Total Paid: 0.00
Total Credit Adj: 0.00
Total Chrg Adj: 0.00
Ded S/P/O: 0.00/0

Status: Create Date: 12/19/2013 Tracer: (No Note)
Date Sent: 12/19/2013 On Hold: Re-Sent: (No Note)
Claim Status Note: (No Note)
Remarks for Unusual Services: (No Note)

Insurance Plan Note:

0-30	31-60	61-90	91-120	Family Balance
2904.00	0.00	0.00	0.00	2904.00

Billing Type: (1) Standard Billing - Invoice charges
Last Payment: 0.00
Last Ins. Payment: 0.00
Last Statement Date: 0.00/2403.00
Outstanding Billed to Medical/Dental: 0.00/2403.00
Expected from Dental Insurance: 1550.50
Family Portion of Balance: 1360.50
* Estimates are based on Pending Dental Claims

Today's Charges: 0.00
Est. Dental Ins. Portion: 0.00
Est. Patient Portion: 0.00

Payment Agreement Summary:
Pmt Amount: NA Pmt Due: NA
Amt Past Due: NA Due Date: NA

Future Due Payment Plans Summary:
Original Bal: 0.00 Payment: 0.00
Remain Bal: 0.00 Due Date:

Dentrix Ledger with claim details and note fields visible, highlighting where to copy and paste insurance claim notes

Step 2: Highlight the primary insurance claim

In the Dentrix Ledger, locate and highlight the primary insurance claim you want to split. Claims in the ledger are listed by date, patient name, and description, so select the relevant claim row.

Date	Name	Tooth Code	Description	Amount	Prov	Ins	Balance
09/11/2012	Jamie Winters	D1515	Fixed Bilateral Mandibles	492.00	DD\$1	No	492.00
04/19/2013	Jamie Winters	D0220	Intraoral Periapical Film	26.00	DD\$1	No	431.00
04/19/2013	Jamie Winters	D0140	Limited Evaluation	70.00	DD\$1	No	501.00
12/01/2013	Jamie Winters	D0120	Periodic Evaluation	46.00	DD\$1		547.00
12/01/2013	Jamie Winters	D0274	Bleewing Four Films	59.00	DD\$1		606.00
12/01/2013	Jamie Winters	D1110	Prophylaxis - Adult	85.00	DD\$1		691.00
12/01/2013	Jamie Winters	18 D2740	Full Porcelain/Ceramic Crown	1031.00	DD\$1		1722.00
12/01/2013	Jamie Winters	18 D2960	Cone Buildup w/ Amy Pins	252.00	DD\$1		1974.00
12/01/2013	Jamie Winters	18 D3330	Root Canal Therapy on Molar	930.00	DD\$1		2904.00
12/19/2013	Jamie Winters		PR Dental Claim - Batched 2403.00				2904.00

0-->30	31-->60	61-->90	91-->	Family Balance	Today's Charges
2904.00	0.00	0.00	0.00	2904.00	Est. Dental Ins. Portion 0.00
					Est. Patient Portion 0.00

Billing Type	(1) Standard Billing - finance charges	Date
Last Payment	0.00	
Last Ins. Payment	0.00	
Last Statement Date		
Outstanding Billed to Medical/Dental	0.00/2403.00	
Expected from Dental Insurance *	1550.50	
Family Portion of Balance *	1852.50	

* Estimates are based on Pending Dental Claims

Dentrix Ledger screen showing a list of claims for Jamie Winters, with the primary claim highlighted

Step 3: Open the Split Primary Claim option

From the ledger menu bar at the top, click **Insurance**. In the Insurance menu, select **Split Primary Claim** to open the Split Claim dialog box.

Step 4: Move procedures to the second claim

The Split Claim dialog box displays two panes:

- **Claim #1:** Lists all procedures currently on the claim.
- **Claim #2:** Initially empty — this will hold the procedures you move to the new claim.

For example, procedures such as "Bitewing Four Films," "Prophylaxis - Adult," and "Root Canal Therapy on Molar" appear with their respective codes and fees.

Claim #1

Tooth	Surface	Description	Date	Code	Fee
		Bitewing Four Films	12/01/2013	D0274	59.00
		Periodic Evaluation	12/01/2013	D0120	46.00
		Prophylaxis - Adult	12/01/2013	D1110	85.00
19		Core Buildup w/ Any Pins	12/01/2013	D2950	252.00
19		Full Porcelain/Ceramic Crown	12/01/2013	D2740	1031.00
19		Root Canal Therapy on Molar	12/01/2013	D3330	930.00
Total Billed:					2403.00

Claim #2

Tooth	Surface	Description	Date	Code	Fee
Total Billed:					0.00

Main Window Table:

Tooth Code	Description	Amount	Prov	Ins	Balance
D1515	Fixed Bilateral Mantainer	405.00	DD51	No	405.00
D0220	Internal Periodical Film	26.00	DD51	No	431.00
D0140	Limited Evaluation	70.00	DD51	No	501.00
D0120	Periodic Evaluation	46.00	DD51	No	547.00
D0274	Bitewing Four Films	59.00	DD51	No	606.00
D1110	Prophylaxis - Adult	85.00	DD51	No	691.00
19 D2740	Full Porcelain/Ceramic Crown	1031.00	DD51	No	1722.00
19 D2950	Core Buildup w/ Any Pins	252.00	DD51	No	1974.00
19 D3330	Root Canal Therapy on Molar	930.00	DD51	No	2904.00
Total		2403.00			2403.00

Financial Summary:

Billing Type (1) Standard Billing - finance charges				Today's Charges	
Last Payment	0.00	Date		Est. Dental Ins. Portion	0.00
Last Ins. Payment	0.00	Date		Est. Patient Portion	0.00
Last Statement Date					
Outstanding Billed to Medical/Dental	0.00/2403.00				
Expected from Dental Insurance *	1550.50				
Family Portion of Balance *	1353.50				
* Estimates are based on Pending Dental Claims					

Split Claim dialog box open, showing procedures under Claim #1 and Claim #2, with arrow buttons to move procedures between claims

Highlight the procedures in **Claim #1** that need to be moved — for instance, those requiring resubmission or additional information. Click the **down arrow** button to move the selected procedures to **Claim #2**. If you move a procedure by mistake, highlight it in Claim #2 and use the **up arrow** to move it back to Claim #1.

For example, procedures for tooth 19 — "Core Buildup w/ Any Pins," "Full Porcelain/Ceramic Crown," and "Root Canal Therapy on Molar" — are moved to Claim #2.

Split Claim for Jamie Winters sent on 12/19/2013 for \$2403.00

Claim #1

Tooth	Surface	Description	Date	Code	Fee
		Blewing Four Films	12/01/2013	D0274	59.00
		Periodic Evaluation	12/01/2013	D0120	45.00
		Prophylaxis - Adult	12/01/2013	D1110	85.00
Total Billed:					190.00

Claim #2

Tooth	Surface	Description	Date	Code	Fee
19		Core Buildup w/ Any Pins	12/01/2013	D2950	252.00
19		Full Porcelain/Ceramic Crown	12/01/2013	D2740	1031.00
19		Root Canal Therapy on Molar	12/01/2013	D3330	930.00
Total Billed:					2213.00

Main Window Table:

Tooth	Code	Description	Amount	Prov	Ins	Balance
	D1515	Fixed Bilateral Mantainer	405.00	DD51	No	405.00
	D0220	Intraoral Periapical Film	25.00	DD51	No	431.00
	D0140	Limited Evaluation	70.00	DD51	No	501.00
	D0120	Periodic Evaluation	45.00	DD51	No	547.00
	D0274	Blewing Four Films	59.00	DD51	No	606.00
	D1110	Prophylaxis - Adult	85.00	DD51	No	691.00
19	D2740	Full Porcelain/Ceramic Crown	1031.00	DD51	No	1722.00
19	D2950	Core Buildup w/ Any Pins	252.00	DD51	No	1974.00
19	D3330	Root Canal Therapy on Molar	930.00	DD51	No	2904.00
Total			2403.00			2904.00

Summary:

0 -> 30	31 -> 60	61 -> 90	91 ->	Family Balance	Today's Charges
2904.00	0.00	0.00	0.00	2904.00	0.00
					Est. Dental Ins. Portion
					0.00
					Est. Patient Portion
					0.00

Billing Type: (1) Standard Billing - finance charges

Last Payment: 0.00 **Date:**

Last Ins. Payment: 0.00 **Date:**

Last Statement Date: 0.00/2403.00

Outstanding Billed to Medical/Dental: 1550.50

Expected from Dental Insurance *: 1550.50

Family Portion of Balance *: 1553.50

* Estimates are based on Pending Dental Claims

Payment Agreement Summary:

Print Amount	NA Print Due	NA
Print Amount	NA Print Due	NA
Print Amount	NA Print Due	NA

Future Due Payment Plans Summary:

Original Bal.	0.00	Payment	0.00
Original Bal.	0.00	Payment	0.00
Remain Bal.	0.00	Due Date	

Split Claim dialog box with some procedures moved to Claim #2, showing updated totals for each claim

Step 5: Review and adjust the split

Double-check that the correct procedures are listed in each claim. Use the arrow buttons to make any necessary adjustments before finalizing.

Split Claim for Jamie Winters sent on 12/19/2013 for \$2403.00

Claim #1

Tooth	Surface	Description	Date	Code	Fee
		Bleeding Four Films	12/01/2013	D0274	58.00
		Periodic Evaluation	12/01/2013	D0120	46.00
		Prophylaxis - Adult	12/01/2013	D1110	85.00
19		Core Buildup w/ Any Pins	12/01/2013	D2950	252.00
Total Billed: 442.00					

Claim #2

Tooth	Surface	Description	Date	Code	Fee
19		Full Porcelain/Ceramic Crown	12/01/2013	D2740	1031.00
19		Root Canal Therapy on Molar	12/01/2013	D3330	930.00
Total Billed: 1961.00					

Main Ledger Window

Tooth Code	Description	Amount	Prov	Ins	Balance
D1515	Fixed Bilateral Mandibular	405.00	DD	1	405.00
D0220	Intraoral Periodical Exam	25.00	DD	1	431.00
D0140	Limited Evaluation	70.00	DD	1	501.00
D0120	Periodic Evaluation	46.00	DD	1	547.00
D0274	Bleeding Four Films	58.00	DD	1	605.00
D1110	Prophylaxis - Adult	85.00	DD	1	691.00
19 D2740	Full Porcelain/Ceramic Crown	1031.00	DD	1	1722.00
19 D2950	Core Buildup w/ Any Pins	252.00	DD	1	1974.00
19 D3330	Root Canal Therapy on Molar	930.00	DD	1	2904.00
Total: 2904.00					

Summary

0-30	31-60	61-90	91-120	Family Balance	Today's Charges
2904.00	0.00	0.00	0.00	2904.00	0.00

Billing Type (1) Standard Billing - finance charges

Last Payment	Date
0.00	

Payment Agreement Summary

Pay Amount	NA Pay Due	NA
0.00	NA	NA

Future Due Payment Plans Summary

Original Bal.	0.00	Payment	0.00
Remain Bal.	0.00	Due Date	

Split Claim dialog box showing procedures distributed between Claim #1 and Claim #2, with updated totals

Step 6: Finalize the split claims

Click **OK** to confirm and exit the Split Claim dialog box. The Ledger now displays two separate claims for the same date: the first claim contains the procedures that remained in Claim #1, and the second contains those moved to Claim #2. Each claim then functions like any other primary claim in Dentrix.

For example, the ledger shows "Pt Dental Claim - Sent 190.00" and "Pt Dental Claim - Sent 2213.00" for the same patient and date.

Dentrix Ledger - Winters, Jamie [W00002]

Primary Dental Insurance Claim (12/19/2013) Sent

File Create Secondary Create Medical Enter Payment Remarks Submit Help

Patient: Winters, Jamie
Subscriber: Winters, Carl
Employer: Qwest
Carrier: Lincoln National
Group Plan: Qwest
 (Release of Info/Assign of Benefits)
eClaims Ready: (eClaims is not set up)

Billing Provider: Smith, Dennis
Rendering Provider: Smith, Dennis
Pay To Provider: Smith, Dennis
Claim Information: Standard
Diagnostic Codes:

Tooth Surface	Description	Date	Code	Fee	Ins Paid
19	Full Porcelain/Ceramic Crown	12/01/2013	D0270	1031.00	0.00
19	Core Buildup w/ Any Pins	12/01/2013	D2950	252.00	0.00
19	Root Canal Therapy on Molar	12/01/2013	D3330	930.00	0.00

Total Billed: 2213.00
Est Ins Portion: 1360.50
Itemized Total: 0.00
Total Paid: 0.00
Total Credit Adj: 0.00
Total Chrg Adj: 0.00
Ded S/P/D: 0.00

Status:
 Create Date: 12/19/2013
 Date Sent: 12/19/2013
 Claim Status Note: (No Note)

Insurance Plan Note:
 (No Note)

Remarks for Unusual Services:
 (No Note)

0-30	31-60	61-90	91-120	Family Balance
2904.00	0.00	0.00	0.00	2904.00

Today's Charges:
 Est. Dental Ins. Portion: 0.00
 Est. Patient Portion: 0.00

Billing Type: (1) Standard Billing - finance charges
 Last Payment: 0.00
 Last Ins. Payment: 0.00
 Last Statement Date: 0.00/2403.00
 Outstanding Billed to Medical/Dental: 1550.50
 Expected from Dental Insurance: 1363.50
 Family Portion of Balance: 1363.50
 * Estimates are based on Pending Dental Claims

Payment Agreement Summary:
 Pmt Amount: NA
 Amt Past Due: NA
 Pmt Due Date: NA

Future Due Payment Plans Summary:
 Original Bal: 0.00
 Remain Bal: 0.00
 Pmt Due Date: 0.00

Dentrix Ledger showing two split claims for Jamie Winters, with claim details and amounts visible

Step 7: Enter payments and resubmit claims

Enter payment for the procedures that have received payment on the appropriate claim. Paste the insurance claim notes you copied earlier into the second claim, and add any additional information required directly from the Ledger. Resubmit the second claim as needed, making sure all necessary documentation is included.

Summary

Splitting a primary claim in Dentrix lets you separate paid procedures from outstanding ones so the unpaid items can be resubmitted to insurance. Always verify the claim's status first, copy any existing claim notes, use the Split Claim dialog box to move procedures between Claim #1 and Claim #2, and confirm the split before entering payments or resubmitting the second claim.