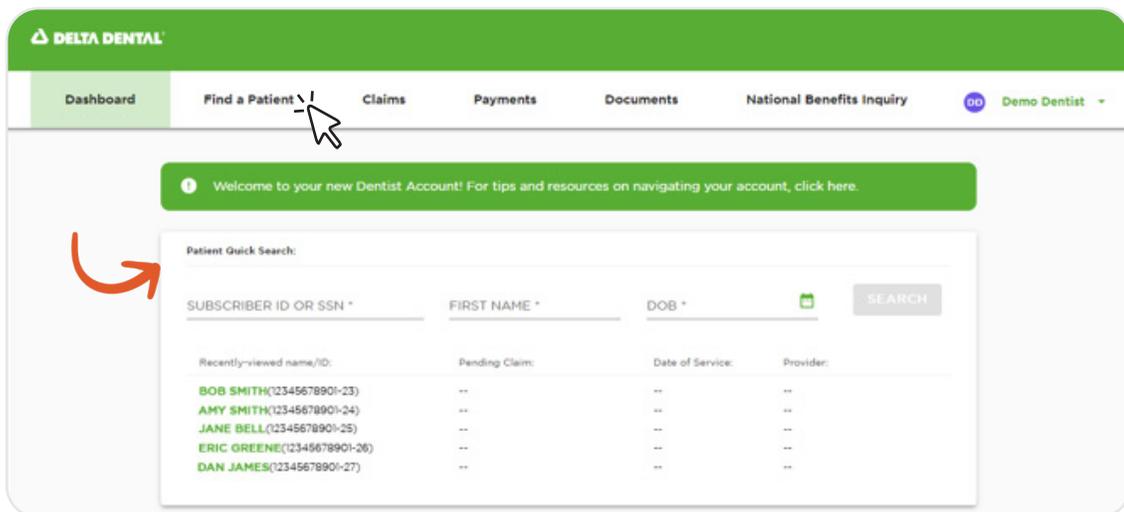


Patient Claim History

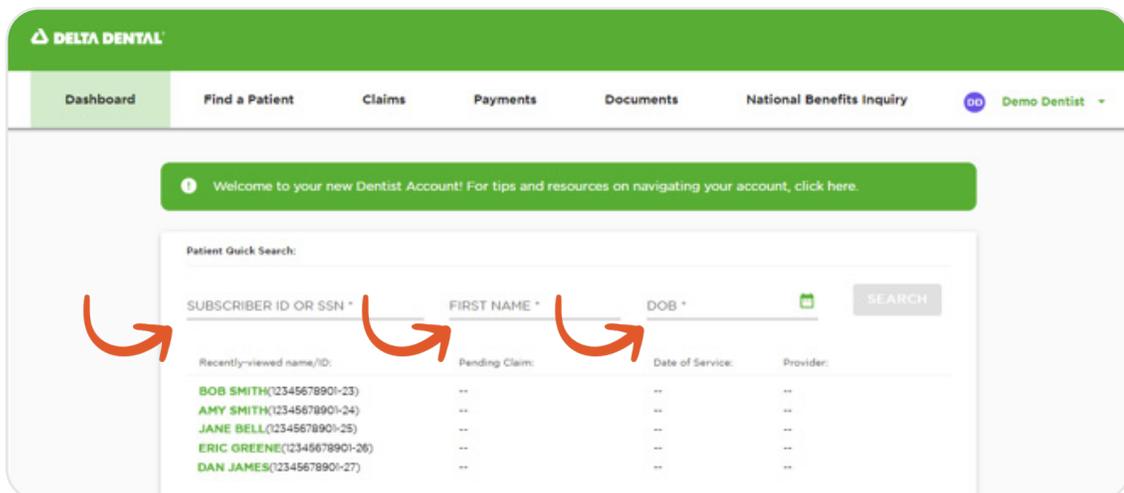
Online Dentist Account

★ How to View a Patient's Claim History

- 1 The Patient Claim History feature can be found in the **Patient History** tab of a patient's Benefits & Eligibility. First pull up your patient either in the **Patient Quick Search** section on the Dashboard or through the **Find a Patient** tab.



- 2 For either of these avenues, you will need the patient's Subscriber ID or SSN, First Name, and Date of Birth.

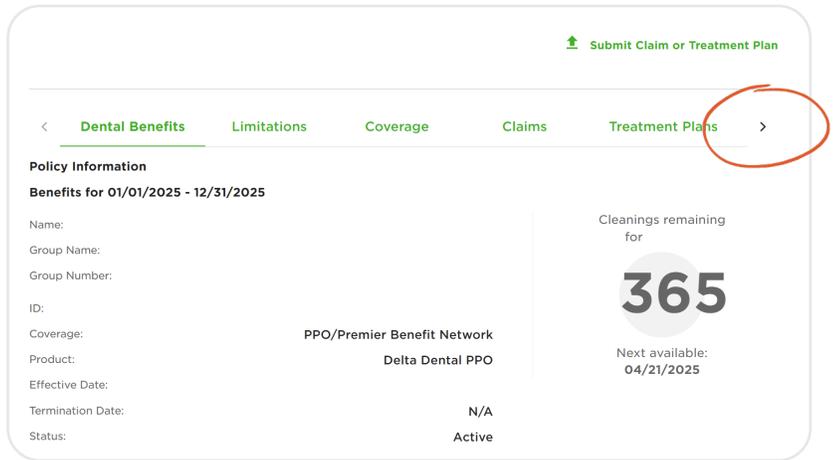


Patient Claim History

Online Dentist Account

★ How to View a Patient's Claim History

3 Once you have your patients' Benefits & Eligibility pulled up, navigate to the **Patient History** tab, by clicking the right arrow next to **Treatment Plans**.



Submit Claim or Treatment Plan

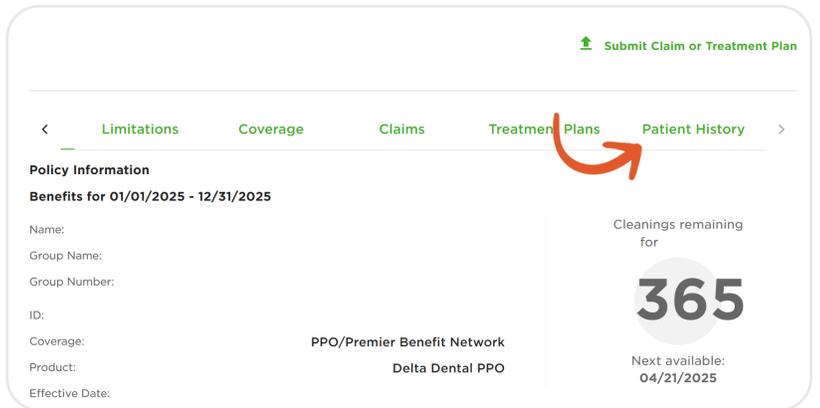
< **Dental Benefits** Limitations Coverage Claims **Treatment Plans** >

Policy Information
Benefits for 01/01/2025 - 12/31/2025

Name:
Group Name:
Group Number:
ID:
Coverage: PPO/Premier Benefit Network
Product: Delta Dental PPO
Effective Date:
Termination Date: N/A
Status: Active

Cleanings remaining for
365
Next available: 04/21/2025

4 Click on the words **Patient History** on the far right in green text.



Submit Claim or Treatment Plan

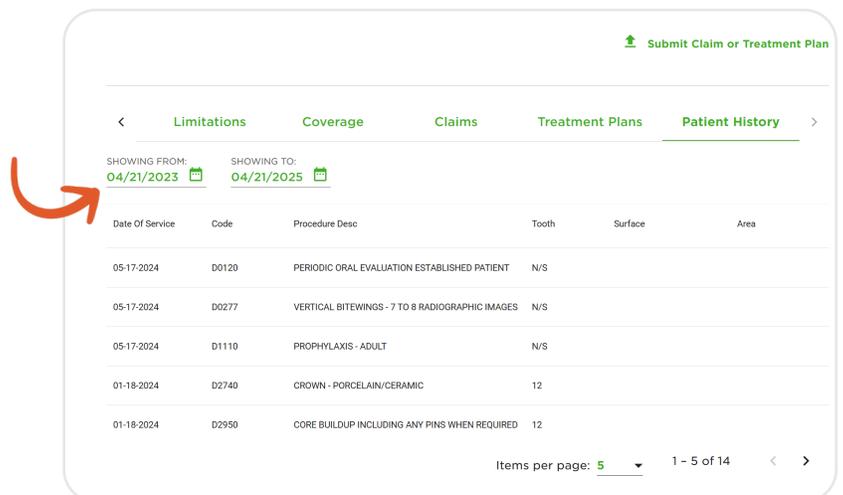
< Limitations Coverage Claims **Treatment Plans** **Patient History** >

Policy Information
Benefits for 01/01/2025 - 12/31/2025

Name:
Group Name:
Group Number:
ID:
Coverage: PPO/Premier Benefit Network
Product: Delta Dental PPO
Effective Date:

Cleanings remaining for
365
Next available: 04/21/2025

5 This feature will default to listing the patient's claim history for the last 24 months with this plan. This can be expanded to include all claims received for this patient up to the Effective Date of this plan. To adjust the dates of services listed, click the green text of either the **Showing From** or **Showing To** date. You can adjust by year, month, and day desired.



Submit Claim or Treatment Plan

< Limitations Coverage Claims **Treatment Plans** **Patient History** >

SHOWING FROM: 04/21/2023 SHOWING TO: 04/21/2025

Date Of Service	Code	Procedure Desc	Tooth	Surface	Area
05-17-2024	D0120	PERIODIC ORAL EVALUATION ESTABLISHED PATIENT	N/S		
05-17-2024	D0277	VERTICAL BITEWINGS - 7 TO 8 RADIOGRAPHIC IMAGES	N/S		
05-17-2024	D1110	PROPHYLAXIS - ADULT	N/S		
01-18-2024	D2740	CROWN - PORCELAIN/CERAMIC	12		
01-18-2024	D2950	CORE BUILDUP INCLUDING ANY PINS WHEN REQUIRED	12		

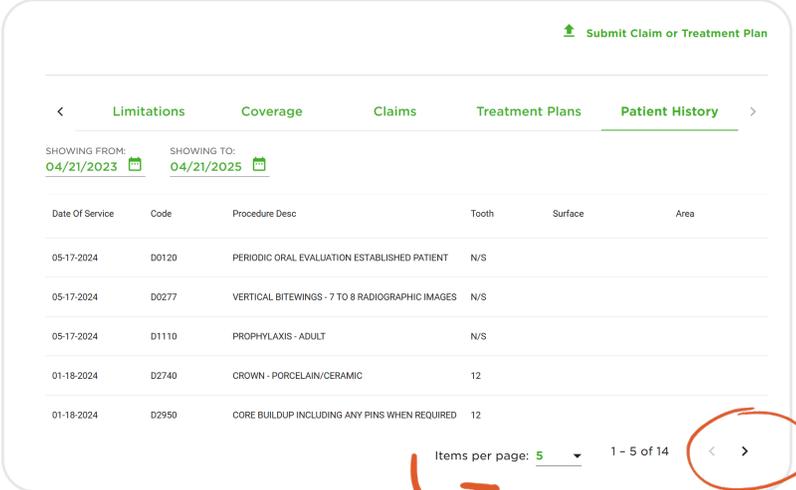
Items per page: 5 1 - 5 of 14 < >

Patient Claim History

Online Dentist Account

How to View a Patient's Claim History

6 It will default to listing five CDT codes per page with the most recent at the top of the list. You can either click the right arrow at the bottom right to view more or increase the number of items listed per page.



Submit Claim or Treatment Plan

< Limitations Coverage Claims Treatment Plans Patient History >

SHOWING FROM: 04/21/2023 SHOWING TO: 04/21/2025

Date Of Service	Code	Procedure Desc	Tooth	Surface	Area
05-17-2024	D0120	PERIODIC ORAL EVALUATION ESTABLISHED PATIENT	N/S		
05-17-2024	D0277	VERTICAL BITEWINGS - 7 TO 8 RADIOGRAPHIC IMAGES	N/S		
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01-18-2024	D2950	CORE BUILDUP INCLUDING ANY PINS WHEN REQUIRED	12		

Items per page: 5 1 - 5 of 14 < >

Patient Claim History [Watch Video](#)

Watch this video to learn how to view a patient's claim history via the online dentist account.