

Find the money in your own report, without uploading anything

Drop in the outstanding-claims report from your practice software and, if you have them, your insurer payment files and bank statement. Owedex works out what's collectible, in your browser. Nothing is uploaded.

Private

The files are read in your browser and never leave your computer.

Real exports

Dentrix, Eaglesoft, Open Dental and hand-made reports, as CSV or Excel. Title and total lines are skipped.

A result to share

A totals-only summary to send to the dentist or owner.

Before you start: create your free account at app.owedex.com (Guide 0, about 2 minutes). You land in Owedex's demo office, **Bluebonnet Family Dental (made up)**. Every patient, claim and dollar in it is made up, so you can try everything without your own data.

The pictures were taken on Wednesday, October 7, 2026. The demo's dates move with today's date, so your dollar amounts and dates will be different. The steps and screens are the same.

In this guide

1. Start the free check
2. Add your files
3. The claims report
4. A payment file
5. The bank statement
6. See the number
7. Share the result

Step by step

1

Start the free check

In the grey demo bar, click **Run the free check on your own report** . Type your office's name and click **Next: add your files** .

PRIVATE MODE · STEP 1 OF 2

What's your office called?

It goes on the letters Owedex drafts for you. Everything stays on this computer.

Office name

My office (test)

Kind of practice

☒ **Dental**
Dental codes like D2740

☐ **Optometry**
Eye exams and eyewear, like 92014 and V2020

☐ **Physical therapy**
Therapy codes and modifiers, like 97110-GP

Next: add your files -> [Explore the demo instead](#)

2

Add your files

Click a box, or drag files onto it. To follow this guide exactly, use the made-up files in the folder **Sample files (made up)** that came with these guides.

Your office is waiting for approval. We review every new office by hand, usually within one business day, and email maria.manager@example.com when it's ready. Until then: the demo offices and the free check on your own report. [Check again](#)

Free check · private · your files are analysed and saved only in this browser · nothing is uploaded to Owedex · [Open the demo](#)

YOUR OFFICE

My office (test) ▼

Today
Work queue
Before you send
Insurers
Results
Money to the bank
Estimates
Add files 6
Activity log
Settings

Saved on this computer
Your office (on this computer)
Every view logged on this computer

Lock
Sign out

Add files

For **My office (test)**. Offices on Open Dental connect once and never do this by hand.

Outstanding claims report

The insurance aging report from your practice software, saved as CSV or Excel. Owedex sorts every claim by reason, dollars and deadline.

Choose or drop files

Insurer payment files (835)

Electronic remittances from your clearinghouse. Every line is checked against your contract and every denial is explained. Adding the same file twice changes nothing.

Choose or drop files

PPO fee schedule

Insurer, procedure code and contracted fee (CSV or Excel). Owedex checks every payment against it.

Choose or drop files

Bank statement

Account activity exported from online banking or QuickBooks / Xero, as CSV or Excel. Owedex follows every insurer payment to its deposit. Account numbers are never kept.

Choose or drop files

Paper EOBs

Photograph or scan an insurer's paper Explanation of Benefits. Owedex reads it, checks the math, and shows what it read beside the page. Nothing is recorded until you confirm, and then it's handled exactly like an insurer's 835 file.

Reading paper EOBs needs the Owedex cloud (under a signed BAA). In private mode nothing leaves this computer, so enter the payment on the claim by hand.

No files handy? Use the test clinic.

Hill Country Family Dental (TEST): a made-up Austin office on Open Dental with 53 open claims and 5 insurer payment files (payments, denials with real reason codes, underpayments, a downcode, a virtual card and a clawback), plus its bank statement. No real patients. It opens as its own office, so My office (test) stays untouched. Switch back any time from the office menu.

Load the test clinic

Answer key

No files handy? Click **Load the test clinic** for a made-up office.

3

The claims report

Outstanding claims report → **eaglesoft-aging.xlsx** .

✓ **eaglesoft-aging.xlsx** · 8 claims read · 8 new · 0 updated · left out 2 title lines, 1 total line (so nothing counts twice), 1 credit balance (\$25.00: you may owe a refund)

Owedex says what it read and what it left out, so nothing counts twice.

4

A payment file

Insurer payment files (835) → **era-pipe-newline.835** .

✓ **era-pipe-newline.835** · 1 payment · matched 0 claims: 0 paid and closed, 0 denied · 1 downcoded (add your fee schedule to see the dollars)

5

The bank statement

Bank statement → **bank-activity.xlsx** .

✓ **bank-activity.xlsx** · 2 insurance deposits kept · 0 insurer payments followed to the bank

6

See the number

Click **Today**. The big number is what Owedex can likely recover, out of what insurers owe you.

Owedex can likely recover

\$1,140

of \$1,595 insurers owe you, across 9 open claims.

[Or work the queue for an hour, best claims first →](#)

With these sample files: **\$1,140** of **\$1,595** across **9** open claims.

7

Share the result

Your free check is done has a totals-only summary with no patient names. Click **Copy the summary** and email it to the dentist or owner.

PAID TOO LITTLE

None found

below contract or usual pay

DOWNCODED

1 claim

paid as a cheaper code

DENIED, NOT APPEALED

\$384

2 claims waiting for a letter

CARD FEES

None found

no virtual-card payments

Your free check is done

Share the result with your dentist or office owner. Totals only: no patient names.

Owedex free check for My office (test) (Oct 7, 2026)
 Insurers owe \$1,595 across 9 open claims. Owedex can likely recover \$1,140.
 \$1,262 is more than 60 days old.
 Downcoded (paid as a cheaper code than you billed): 1 claim.
 Denied and not appealed yet: \$384 on 2 claims.
 Spotted a clawback to verify (\$85).
 Checked privately in the browser: the files never left this computer. No patient names in this summary.

Copy the summary

FOUNDING 10

Want Owedex to work these claims for you?

- **30-day pilot at 25% of what Owedex recovers.** Nothing recovered, nothing owed.
- Then **\$199 a month for life** (regular \$299), month to month.
- Nothing goes to an insurer until you approve it. We never work for insurers.

Apply for the Founding 10 →

To go back to the demo, click **Open the demo** in the top bar.

The summary (with the sample files)

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