

Make Owedex work the way your office works

Settings change what Owedex does: the clock it plans by, how your day is planned, how every letter is signed, and which insurer phone lines it can count on. Every change is recorded in the activity log.

Your clock

The office time zone decides what “today” is: deadlines, claim ages, bank holidays and the close.

Your day, your way

Working hours, close time, how many moves a day, and how close a deadline must be to go first.

Letters and phone lines

Sign letters with your name, phone and NPI. Confirm insurer phone hours so calls are planned while lines are open.

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 . Open Settings
- 2 . Plan your day
- 3 . Sign your letters
- 4 . Confirm an insurer's phone hours
- 5 . Check the time zone
- 6 . See it on Today

Step by step

1

Open Settings

Click **Settings** at the bottom of the left menu. On the left, the sections: Time zone, Your day, Letters, Phone lines, Practice and more. Click one to jump to it. In the demo, changes last until you reload.

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](#)

Demo · made-up data · made-up offices and patients · runs only in your browser · [Run the free check on your own report](#)

Owedex

OFFICE

Bluebonnet Family Dent

Today

Work queue

Before you send

Insurers

Results

Money to the bank

Estimates

Add files

Activity log

Settings8

Demo data loaded

Alex (billing company)

Every view logged on this computer

LockSign out

Settings

Demo: try every setting on the made-up office. Changes last until you reload.

Time zone

Your day

Letters

Insurer contacts

Phone hours

Practice

This device

Office time zone

What "today" is for Bluebonnet Family Dental (made up): deadlines, claim ages, the bank-day calendar, insurer phone hours and the close all use it.

Time zone

Central (Chicago, Texas)

It's 4:01 PM CDT there now · Wednesday, October 7, 2026

Save time zone

Your day

How Owedex plans the best moves on Today and when it gets tomorrow ready.

Working day starts

Working day ends

The close

7:00 AM

6:00 PM

5:00 PM

Moves per day

Deadlines first when within

7

3 bank days

Owedex plans up to 7 moves a day, puts any deadline within 3 bank days first, shows the day from 7:00 AM to 6:00 PM, and opens the close card at 4:00 PM for a 5:00 PM close. A plan already made

In your own office, the owner and the office manager can change these; everyone else can see them.

2

Plan your day

Under **Your day**, pick when the working day starts and ends, when the close is, how many moves a day, and how close a deadline must be to go first. The line below says exactly what Owedex will do. Click **Save your day**.

Your day

How Owedex plans the best moves on Today and when it gets tomorrow ready.

Working day starts

7:00 AM



Working day ends

6:00 PM



The close

5:30 PM



Moves per day

5



Deadlines first when within

3 bank days



Owedex plans up to **5 moves** a day, puts any deadline within **3 bank days** first, shows the day from **7:00 AM** to **6:00 PM**, and opens the close card at **4:30 PM** for a **5:30 PM** close. A plan already made for today keeps its moves; the next plan uses these settings.

Save your day

[Undo changes](#)

In the picture: Owedex plans up to 5 moves a day, puts any deadline within 3 bank days first, shows the day from 7:00 AM to 6:00 PM, and opens the close card at 4:30 PM for a 5:30 PM close. A plan already made for today keeps its moves; the next plan uses these settings.

3

Sign your letters

Under **Letters**, type the signature line, the billing phone and the billing NPI. The preview shows how every letter will end. Click **Save signature**.

Letters

How every letter Owedex drafts is signed. Insurers match claims by your NPI, so adding it speeds up reprocessing.

Signature line

Maria Lopez, Office Manager

Billing phone (optional)

512 555 0100

Billing NPI (optional)

1234567893

Save signature

[Undo changes](#)

EVERY LETTER ENDS

Sincerely,

Maria Lopez, Office Manager
Bluebonnet Family Dental (made up)
(512) 555-0100 · NPI 1234567893

Owedex checks the NPI's check digit, so a typo is caught before it reaches an insurer. The NPI in the picture, 1234567893, is the example NPI that CMS publishes.

4

Confirm an insurer's phone hours

Under **Insurer phone lines**, pick the insurer, type its provider line, and pick when it opens and closes and in which time zone (as the insurer's manual or portal states). Click **Save hours**.

Insurer phone lines

Hours you confirmed from each insurer's provider manual or portal. Owedex uses them on Today: it plans calls while the line is open and puts your number first on the move. Without them it uses the insurer's published hours when there are any, and otherwise says the hours aren't on file. It never guesses.

Cigna Dental

Mon-Fri 8:00 AM-5:00 PM Central · (800) 555-0199

[Remove](#)

Add an insurer's hours

Insurer

Aetna Dental

Provider line (optional)

(800) 555-0100

Opens

8:00 AM

Closes

5:00 PM

In this time zone

Central (Chicago, Texas)

Save hours

Monday to Friday, closed on bank holidays.

► Hours Owedex already has from published sources (5)

Owedex then plans calls to that insurer while the line is open and puts your number first on the move, marked **Confirmed by your office**, with a Copy button. Guide 11 shows the numbers and emails in detail.

5

Check the time zone

Under **Office time zone**, pick your office's time zone. The preview shows the time and date there right now.

Office time zone

What “today” is for Bluebonnet Family Dental (made up): deadlines, claim ages, the bank-day calendar, insurer phone hours and the close all use it.

Time zone

Central (Chicago, Texas)

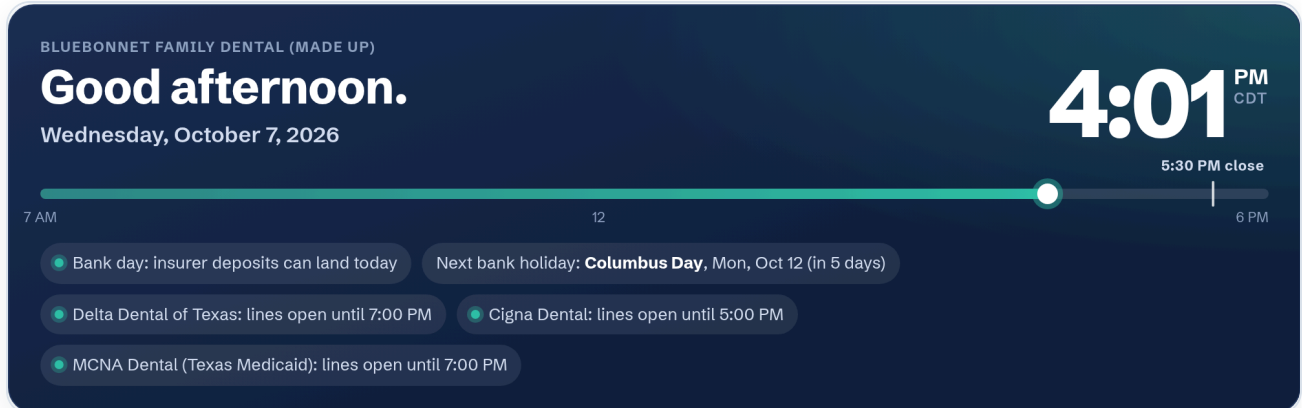
It's 4:01 PM CDT there now · Wednesday, October 7, 2026

Save time zone

6

See it on Today

Back on **Today**, the bar shows your close time, and calls to an insurer with confirmed hours show whether the line is open and its number.



A plan already made for today keeps its moves. The next plan (after the close, or tomorrow) uses the new settings.

How Owedex works this out

- Every setting is checked the same way in your browser and in the Owedex cloud: times in 15-minute steps, the close inside the working day, a valid NPI, a US phone number.
- Changing a setting writes who changed what and when to the activity log.
- Insurer phone hours are only ever the ones you confirmed, or ones Owedex has a published source for. When an insurer publishes its number but not its hours, Owedex shows the number and says the hours aren't published.