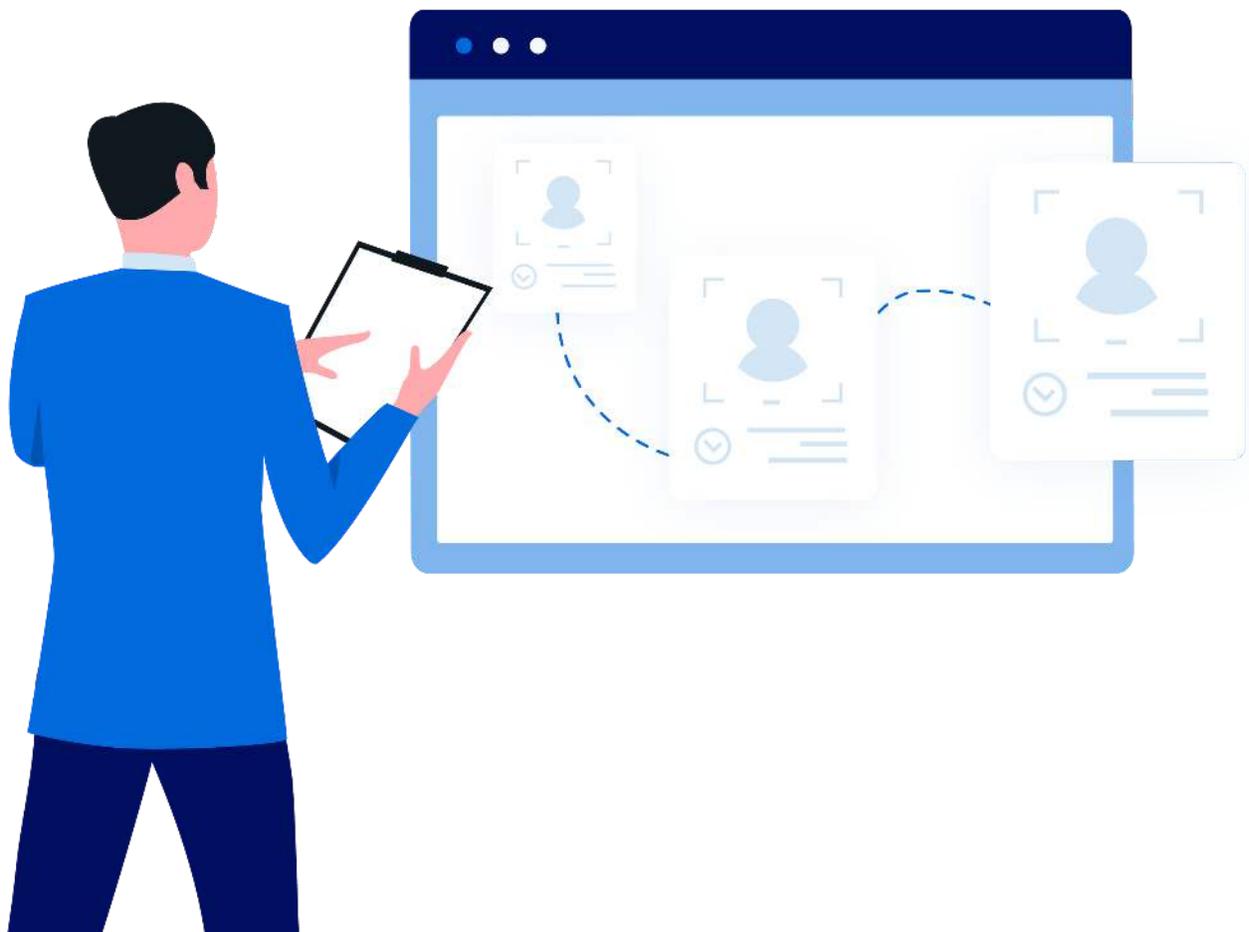


## Help Articles

**Which reports and activities does Denticon recommend to generate at the end of each month, and at the end of each year?**



# Which reports and activities does Denticon recommend to generate at the end of each month, and at the end of each year?

Denticon highly recommends to “close out” the data each month in order to:

- ensure that staff is not able to financially manipulate past transactions
- ensure financial integrity of the recorded transactions data
- ensure that monthly and yearly reports will be consistent

Denticon's “Close Out” function is performed via:

- Click the word “Setup” and choose the “Close Out” option from the drop-down list
- Using the calendar Date Selector icon, choose the desired “New Closing Date”
- Click the Close Out button

NOTE: Multi-location organizations are able to close out all locations at once by checkmarking the “Close All Offices” box before clicking the Close Out button.

Per the guidance on the “Setup / Close Out” screen, the function is used to “Close Out” the system as of the date that is specified on the screen. The office may run this program at any time that is desired – daily, weekly, monthly, quarterly. The function, by programming default, suggests the previous date; however, the office may backdate the close out date to a differently desired date. It is highly recommended that this program be run at least once a month.

While on the “Setup / Close Out” screen, Denticon recommends to reset insurance benefits at the beginning of months February through December.

NOTE: Denticon’s Support Team will reset yearly benefits only at the start of the calendar year which will affect only the insurance plans with a January 1 date, as is indicated in the insurance plan setup as “Anniversary = 1/1.” It is the office’s responsibility to reset insurance benefits for insurance plans which have a different Anniversary date.

Denticon recommends to generate batch statements "Reports / Statements" each month:

- Click the word "Reports" and choose the "Statements" option from the drop-down list
- Click the Print Statements button
- Ensure all statements are printed to paper before continuing
  - If the office uses Denticon's "Patient Portal" feature, click the Email Statements button in order to notify the Responsible Parties of money due to the office
  - The LAST step, click the Update Stmt Dates button
  - Do NOT click the Update Stmt Dates button until all statements have been generated via the Print Statements and Print Statements button!

NOTE: More information about generating batch statements may be found in the KnowledgeBase by searching the term "statements."

NOTE: Denticon's team is able to generate the office's monthly statements for a nominal fee.

Denticon recommends these monthly reports:

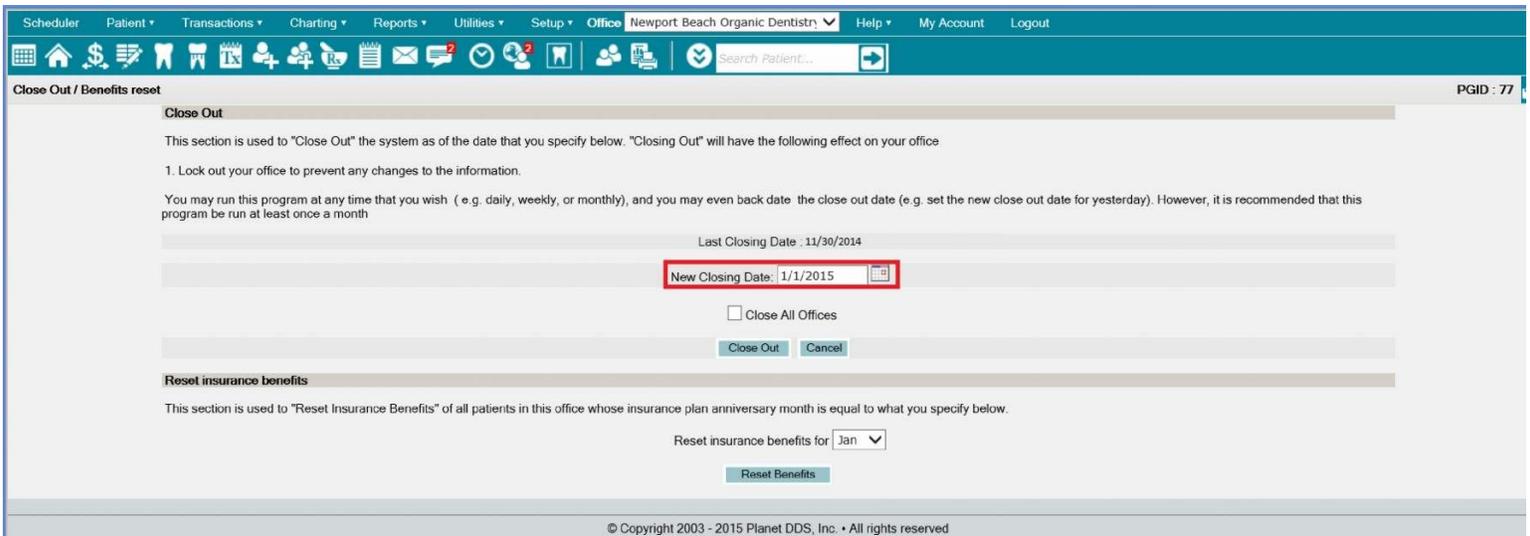
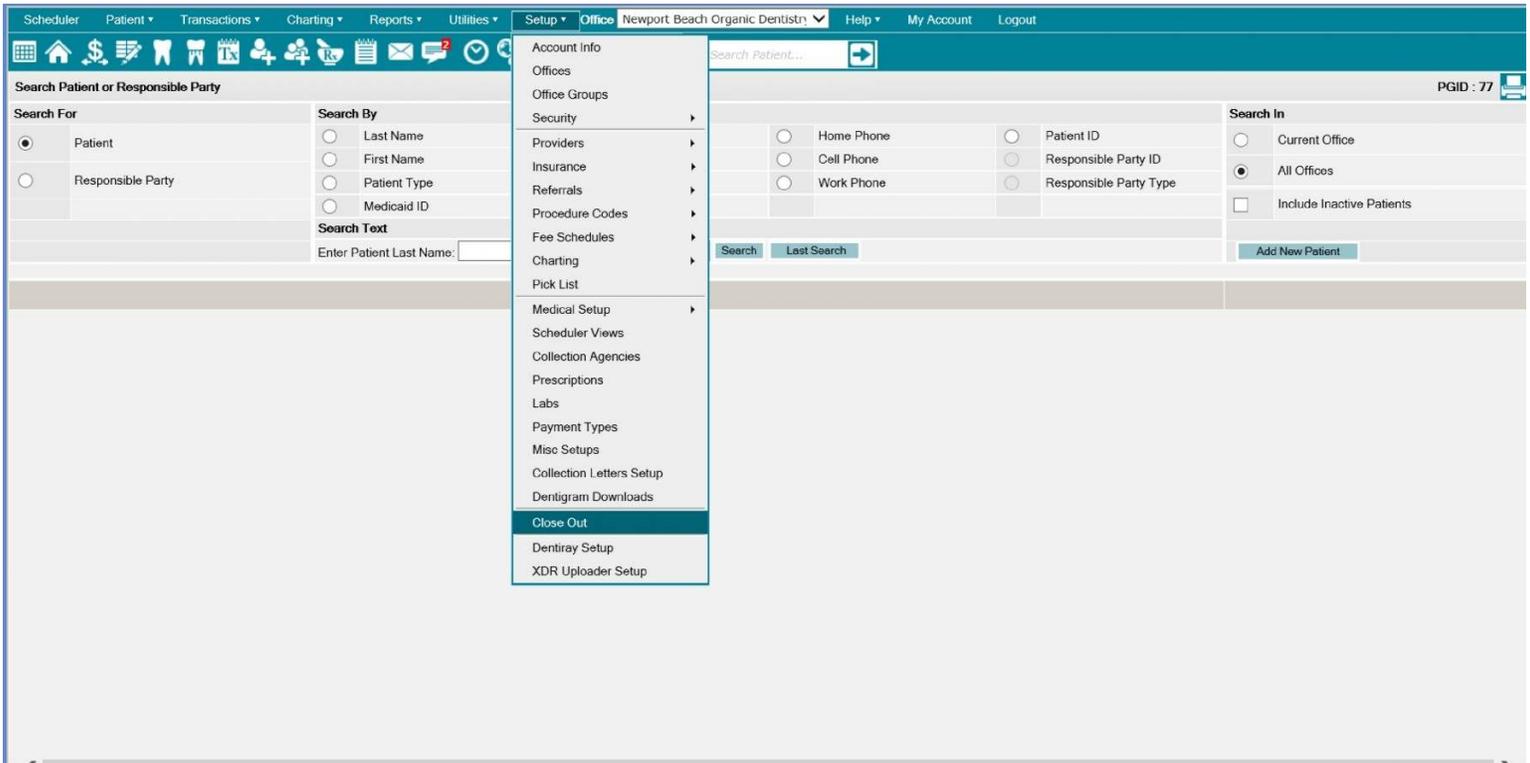
- Reports / Management Reports / Aging-Detail (if the organization is a single location organization)
- Reports / Management Reports / Aging by Home Office (if the organization is a multi-location organization)
- Reports / Insurance Reports / Outstanding Claims
- Reports / Insurance Reports / Pre-Auth Outstanding Claims
- Reports / Recall Reports / Recall due/Overdue but Not Scheduled Report
- Reports / Postcard / Recall Postcards for Recall Due/Overdue but not schedule
- Reports / Postcard / Recall Postcards for Schedule Recall
- Reports / Treatment Plan Reports / Treatment Plan Status Report – Detail
- Reports / Daily Reports / Deposit Slip-Credit Card (to reconcile monthly credit card transactions)
- Reports / Insurance Reports / Capitation Utilization - Detail (if the office is a Managed Care/capitation/DHMO office)

Denticon recommends to generate this report for year-end information:

- Reports / Daily Reports / Executive Summary

NOTE: Some reports have only one date available for the "Report Date" field.

Denticon recommends to generate these reports for the default date in order to obtain "right now" information on the report. For reports which have a date range available, Denticon recommends that the office generate the reports for the desired date range.



Scheduler Patient Transactions Charting Reports Utilities Setup Office Newport Beach Organic Dentist Help My Account Logout

Close Out / Benefits reset PGID : 77

**Close Out**

This section is used to "Close Out" the system as of the date that you specify below. "Closing Out" will have the following effect on your office:

1. Lock out your office to prevent any changes to the information.

You may run this program at any time that you wish (e.g. daily, weekly, or monthly), and you may even back date the close out date (e.g. set the new close out date for yesterday). However, it is recommended that this program be run at least once a month.

Last Closing Date : 11/30/2014

New Closing Date: 1/1/2015

Close All Offices

Close Out Cancel

**Reset insurance benefits**

This section is used to "Reset Insurance Benefits" of all patients in this office whose insurance plan anniversary month is equal to what you specify below.

Reset insurance benefits for: Jan

Reset Benefits

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Scheduler Patient Transactions Charting Reports Report New Utilities Setup Office Beverly Hills Organic Dentist Help My Account Logout

Insurance Plan Setup PGID : 3158 / OID : 102

SEARCH

Group# Plan ID Carrier Name Employer Name

TYPE: ALL Types Dental Medical

SEARCH TEXT (Enter min. 2 chars for search)

Me SEARCH

SEARCH RESULTS

| Employer                          | Group#      | Carrier   |
|-----------------------------------|-------------|---|
| No Employer<br>NA<br>NA, CA 92616 | Member ID   | Denti-Cal<br>P O Box 78987<br>Los Angeles, CA 90066 |
| No Employer<br>NA<br>NA, CA 92616 | Medicaid NY | Medicaid Of NY<br>P O Box 345<br>New York, NY 10021 |
| No Employer                       |             | MEDICAID OF OHIO                                    |

ADD NEW INSURANCE PLAN

PLAN BENEFITS COVERAGE AND LIMITATIONS FEES SMART FEES

Modified On: 05/03/2017 05:59 PM PT  
Modified By: KHI NAPI

|                         |   |                                     |                 |
|-------------------------|---|-------------------------------------|-----------------|
| Plan ID#                | 115   | Fees to Print on Claims             | Office UCR Fees |
| Used                    | Not Used  | Form to Print                       | Denti-cal 2008  |
| Dental or Medical       | Dental  | Print Options                       | Print Claim     |
| Plan Type               | Denti-cal   | Reporting Subtype                   | None            |
| Group No.               | Member ID   | Network Type                        | Unknown         |
| Carrier                 | ID#: 942<br>Denti-Cal<br>P O Box 78987<br>Los Angeles, CA 90066<br>800-909-8787 | Notice of Authorization(NOA) Only   | Yes             |
| Employer                |   | Per Visit Co-Pay                    | \$0.00          |
| Anniversary (Month/Day) | 1/1   | Non Duplicating Benefits            | No              |
|                         |   | Is Ortho Periodic Billing Required? | No              |
|                         |   | Effective Date                      |                 |

EDIT PLAN INFO PRINT PLAN DELETE PLAN

Scheduler Patient Transactions Charting Reports Utilities Setup Office Newport Beach Organic Dentistry Help My Account Logout

Search Patient or Responsible Party

Search For: Patient (selected), Responsible Party

Search In: Current Office, All Offices (selected), Include Inactive Patients

Reports Menu:

- Daily Reports
- Ledger Reports
- Management Reports
- Insurance Reports
- Appointments Reports
- Treatment Plan Reports
- Referral Reports
- Recall Reports
- Statements
  - Lists
  - Letters
  - Batch Collection Letters
  - Postcards
  - Labels
  - Custom
- My Reports
  - Excel Reports
  - Group Reports
  - Office Reports
- Blank Insurance Forms
- Pat Reg./Medical Info Forms
- Dashboard
- Dashboard Demo

Search Patient... [Search] [Last Search]

PGID : 77

Scheduler Patient Transactions Charting Reports Utilities Setup Office Newport Beach Organic Dentistry Help My Account Logout

Statement

Statement Date: 1/1/2015

Responsible Party Range: Start Name: AAAAA, End Name: ZZZZZ

Account Balance Over: 5.00

Options: Only Paper (selected), Only Email, Email & Paper

Sort by: Sort by Resp. Party Lastname (selected), Sort by Resp. Party ID

Last Stmt Date: 11/30/2014, Last Close Out Date: 11/30/2014

Exclude accounts where statement was sent within last 0 days

Exclude accounts where patient portion is paid & insurance portion is expected (checked)

Exclude patients Sent to Collection

Exclude Responsible Party Type: No Type Defined, Cash, Collections

General Message: You can now pay your bill online: Sign Up your responsible party email at yourdentistoffice.com

Over 30 Message: Please remit payment today.

Over 90 Message: Your account is 90 days overdue. If payment not received within 5 business days, it will be referred

Current Message: We appreciate your prompt payments.

Over 60 Message: Your account is 60 days overdue. Please remit payment or call office to discuss your balance.

Over 120 Message: Your account has been referred to collections. Please call 800.541.1212.

Note: Please update Statement Dates after Printing and Emailing respective Office Statements.

Update Stmt Dates [LAST] Print Statement Report Print Statements [FIRST] Email Statements

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