Denticon Reporting 101

What reports matter to each staff member in the office

Front Office Staff

Back Office Staff

Clinical Staff

Management/ C-level

Front Office Staff

Report Name	*Why Use*	*Report Parameters*
Daily Audit Report *Reports > Daily > Daily Audit* *Run Daily (End of Day)	Used as daily audit for the office to verify patients that were scheduled had a Ledger Transaction and the patient's appt was not missed/cancelled *Shows transactions that are Ledger Codes	Patient Has Appts = checked If not signing Prog Notes, can skip last column on report Sort by Provider Checkmarks are good, X's are missing.
Daily Journal by Provider - Detail *Reports > Daily > Daily Journal* *Run Daily (End of Day)	Check for providers with charges that did not work today Verify doctors' services are what they would normally perform Shows all transcations charged out to the Ledger for each Provider	Select "Detail" Exclude Payments, Adjustments are optional Group by Provider or Filter by Provider Click Select > choose the Providers that were ONLY working today.
Deposit Slip *Reports > Daily* *Run Daily (End of Day)	Verify all cash received is on the report and all checks posted are on the report as well. Checks/balances for all collections on a daily basis Shows all of your collections with subtotals by each category.	Make sure to check the Show Cash box Select Care Credit, Direct Deposit, Credit Card, Cash, Checks Can select each individually if needed for Deposit Slip
Appointment Details Report *Reports > Appointment Reports* *Run Daily	If providers are going to use this report to call patients from home, it will give providers the procedures they were seen for. Shows all details from existing appointments for given date range.	Run the report for ALL columns Can include patient phone numbers.
Update Patient Insurance (Conversion) List - By Appointment *Reports > Lists > Patient List* *Run Daily (2 days prior) *if converted from another software	To make sure that patients have the proper insurance. Provides a list of patients that need their insurance updated so they can be verified.	Date range that you'd like to run the report for.
Next Appointment Booked (Excel) *Reports > Office Reports > [Location Name} Reports > Next Appointment Booked Report (Excel)* *Run Daily	To fill the schedule with future appointments. Lists which patients received and did not receive next appointment.	Select office and date range.

Report Name	*Why Use*	*Report Parameters*
Treatment Plan Status - Detail *Reports (old) > Treatment Plan Reports > Treatment Plan Status - Detail* *Run Daily, Weekly, Monthly	Find patients to get back onto the schedule who have pending treatment. Gives Tx plan status by Patient who has not completed that treatment and gives their contact information.	Diagnosed Date Range Start / End. Option to run by Procedure Code as well under "Codes". Recommended Treatment Plans: Set to "Accepted", then exclude "Completed" and/or "Scheduled". Must be having Denticon users setting Tx plans as "Accepted" in Tx Plan Entry screen
Recall Due/Overdue but Not Scheduled Report *Reports (old) > Recall Reports > Recall* *Run Daily	Find patients to get back onto the schedule who are due for their recall exams or hygiene appointments. List of all patients that have a Recall Due in that date range and do not have one of the Recall Codes scheduled *Please note that if a patient has 2 of 3 Recall Codes scheduled, the patient + unscheduled Recall code will still appear on this report.	Select Recall Date Range. Be sure to Exclude Scheduled Appointments. Can select Provider/Hygieinst, particular Recall Procedure Codes, if needed. *If you leave this area blank, the report will run for ALL Recall Codes.
Appointment Detail *Reports > Appointment Reports > Appointment Detail* *Run Daily	Gain a better understanding of your upcoming schedule and where opportunities may lie to perform dentistry. Provides a list of all non-cancelled appointments.	Appointment Type = Regular Run report by Appointment Date range. Can include Patient Phone Numbers
Appointment List *Reports > Appointment Reports > Appointment List* *Run Daily	Report used to try to get patients back on the schedule that have missed or cancelled their appointment(s). Provides patient's contact info to reschedule.	Select Cancelled List or Missed List
Call List *Scheduler drop down > Call List* *Run Weekly	Used to reschedule a patient that is either on or off the Call List who has missed or cancelled their appointment(s). Patient information readily available to reschedule patients	Select specified Date Range (can use presets (i.e. Last 3 mo) Select a Duration (mins), if applicable Select Provider, if applicable Select "Show Cancelled" Select "Show Missed" Select "Show Off Call List"
Scheduled Production *Reports > Daily Reports > Scheduled Production* *Run Daily	Projects the total estimated revenue of future days & awareness of slow days to focus on scheduling patients/ production. Shows total production dollars on schedule for future dates.	Select office and date range.

Report Name	*Why Use*	*Report Parameters*
New Patients via Appointments *Reports > Appointment Reports > New Patients via Appointments* *Run Weekly	Used to make sure that the new patient's overview (created from the "Quick Save" placeholder on the Scheduler) is filled out and completed. (those that do not have a full, completed profile in Denticon yet).	Select Date Range
Aging Report - Detail *Reports > Monthly Reports > Aging* *Run Daily	To follow-up on AR for the office. This report allows you to run an Aging report by Responsible Party that includes patient phone number, and balance to collect outstanding AR.	Set Report Format to Detail Account Balance can be set to whatever threshold you want. Make sure "Include Balance Status" is selected.
Patient Progress Notes *Report > Daily Reports > Progress Notes* *Report > Daily Reports > Progress Notes (missing Progress Notes)* *Reports > Daily Reports > Progress Notes (unsigned Progress Notes)* *Run Daily	To audit and ensure progress notes were correctly entered. Lists all patient progress notes entered for quick review on report for accuracy.	Select unsigned under progress to print. Select DOS date range. Can select for one location or multiple
Contract Charges *Utilities > Generate Contract Charges > Generate Ortho Payment Plan Charges* *Run Daily	To generate periodic billing charges so that the Ledger reflects the proper amount due when a patient has a payment contract on file. Lists all patients who are due for a periodic charge	Generate Ortho Payment Plan Charges or Generate Regular Payment Plans or Generate Charges by Practice- *Only use if auto charge feature is disabled*
Procedures On-Hold *Reports (old) > Insurance Reports > Procedures on Hold* *Run Daily	To understand which claims are on Hold, for consideration to release the Hold in order to generate a claim for payment. Provides any procedures the office changed/held the billing.	Select today's date.
Routing Slip *Reports > Appointment Reports > Routing Slips* *Run Daily (end of day)	Prep for the next day of patient appointments on the schedule. Contains important information for each patient who is coming into the practice for a visit.	Select next day

Back Office Staff

Report Name	*Why Use*	*Report Parameters*
Daily Audit Report *Reports > Daily > Daily Audit* *Run Daily (end of day)	Assistants can make sure all patients that received treatment have signed Progress Notes by Provider. Checkmarks are good, X's are missing.	Patient Has Appts = checked Patients Missing Progress Notes and Progress Notes Signed Sort by Provider
Lab Reports *Reports > Appointment Reports* *Run Daily (2 days out from today)	To follow-up on labs that have not been received, and make sure the labs are present so patients don't need to be cancelled *Be sure to include the Lab information in the appointment. Otherwise, the Lab Case will not show up on this report.	Report Type set to "Not Received" (Lab Not Recevied)

Clinical Staff

Report Name	*Why Use*	*Report Parameters*
Daily Journal by Provider - Detail *Reports > Daily > Daily Journal* *Run Daily (end of day)	Check for providers with charges that did not work today Verify doctors' services are what they would normally perform. Shows all transcations charged out to the Ledger for each Provider	Select "Detail" Exclude Payments, Adjustments are optional Filter by specific Provider
Daily Audit Report *Reports > Daily > Daily Audit* *Run Daily (end of day)	Providers can make sure all patients that received treatment have signed Progress Notes by Provider. This will allow them to sign any unsigned notes	Patient Has Appts = checked Patients Missing Progress Notes and Progress Notes Signed Sort by Provider. Checkmarks are good, X's are missing.
Lab Reports *Reports > Appointment Reports* *Run Daily (2 days out from today)	To follow-up on labs that have not been received, and make sure the labs are present so patients don't need to be cancelled *Be sure to include the Lab information in the appointment. Otherwise, the Lab Case will not show up on this report.	Report Type set to "Not Received" (Lab Not Recevied) Shows all lab cases that have not been received
Production by Codes - Provider *Reports (old) > Group Reports > Management Reports > Production by Codes - Provider* *Run Monthly, Quarterly, Yearly	Report can be used as a touchpoint for clinical education. Report gives you production by code by provider.	Select Date Range Can select specific Provider(s) if needed.
Patient Progress Notes *Report > Daily Reports > Progress Notes* *Report > Daily Reports > Progress Notes (missing Progress Notes)* *Reports > Daily Reports > Progress Notes (unsigned Progress Notes)* *Run Daily	To audit and ensure progress notes were correctly entered. Lists all patient progress notes entered for quick review on report for accuracy.	Select detail option under progress notes to print Select DOS. Can select for one location or multiple. For Missing Report: Select missing under progress notes to print. For Unsigned Report: Select unsigned under progress to print

Management/ C-Level

Report Name	*Why Use*	*Report Parameters*
Daily Journal - Summary *Reports > Daily > Daily Journal* *Run Daily, Weekly	To give a snapshot of total Charges, Payments, Adjustments for a given date range for a specific office or office group. Shows totals for Charges, Payments, Adjustments charged out to the Ledger.	Set by Office or by Office Group Select "Summary"
Uncollected Co-Pay Report *Reports > Management reports > Uncollected Co-Pay Report* *Run Daily (End of Day Report)	To make sure the staff is collecting patient copays on the schedule for today to assist with AR. Shows all patients on schedule for today that have a patient balance due (preexisting or balance from today). Includes last Pmt date/amount for the account in addition to the Financial Notes	Financial notes will appear in the Financial Notes column of the report.
Special Transaction Report *Reports (old) > Group Reports > Daily Reports > Management reports* *Run as needed	Use this report to account for the # of procedure codes done for insurance fee negotiations Shows all codes done by Provider, Age for a given date range	Sort by Code. Example: how many sealants done in the day Example: to see D0150 codes were charged out for patients from Ages 0-3, as they should be D0145
Treatment Plan Analysis *Reports (old) > Treatment Plan Reports > Treatment Plan Analysis* *Run Daily, Weekly, Monthly	If actively setting Tx statuses, this will give you a summary for every Tx Status. Gives count and amount of Diagnosed, Alternative, Scheduled, Completed treatments. Gives ratios of Diagnosed Tx to Accepted, Scheduled, and Completed Tx	Diagnosed Date Range Start / End Use default filter settings
Income Allocation - Summary *Reports > Monthly Reports > Income Allocation - Summary* *Run Monthly	If you pay your provider(s) on Collections, please be sure to use this report in Denticon to calculate their compensation. This report gives you the appropriate allocated collection amount for each provider.	Enter in the Pay Period for the Date Range. This will allow you to properly compensate them. Multiply the "Income" column by their compensation % to give you their compensation for selected pay period.

Report Name	*Why Use*	*Report Parameters*
Waterfall Report *Reports > Monthly Reports > WaterFall Report* *Run Quarterly & Yearly	To predict collection rates based on collection numbers assocaited to previous months. Help with cash on hand analysis. This report gives a breakdown by Collections for the Date of Service Month ("Service Date" by the specified date range.	Select Office(s) and have the date range be for at least a quarter.
Executive Summary *Reports > Monthly Reports > Executive Summary* *Run Daily (End of Day), Monthly (End of Month)	To find KPI's on one centralized report for each location. Summary of KPIs (NPs, Production, Collection, Adjustments, Missed Appts, etc.) for a specific date range.	Select Date Range Click "Select" next to the Office OID and then click "Select All" in the next window to run the report for ALL offices.
Aging Report - Detail *Reports > Monthly Reports > Aging* *Run Daily, Weekly, Monthly	To have staff follow-up on AR for the office. This report allows you to run an Aging report by Responsible Party that includes patient phone number, and balance to collect outstanding AR.	Set Report Format to Detail Account Balance can be set to whatever threshold you want Make sure "Include Balance Status" is selected
Aging Report - Summary *Reports > Monthly Reports > Summary* *Run Daily, Weekly, Monthly	Snapshot of the organzaitions AR. This report gives you outstanding AR for patient and insurance balances for each office(s) selected.	Set Report Format to Detail Account Balance can be set to whatever threshold you want Make sure "Include Balance Status" is selected Select "Include Credit Balance" to see the true AR for the specified location(s)
Unallocated Payments/ Adjustments Report *Reports > Monthly Reports > Unallocated Payments/ Adjustments Report* *Run Daily, Weekly, Monthly	For staff to be able to make appropriate adjustments for patient accounts. Report will show you any unallocated Payments and Adjustments for a specific date range to balance your patient ledgers.	Select Date Range Can exclude Credit Balances if needed.
Scheduled Production *Reports -> Daily Reports -> Scheduled Production* *Run Weekly	Projects the total estimated revenue for upcoming week & awareness of slow days to focus on scheduling patients/ production. Shows total production dollars on schedule for future dates.	Select office and date range.

Report Name	*Why Use*	*Report Parameters*
Production by Codes *Reports (old) > Group Reports > Management Reports > Production by Codes* *Run Monthly, Quarterly, Yearly	Can use this report to negotiate fees with Insurance Carriers, as this report will show # of codes rendered and what the charges were for each code.	Select Date Range. Report gives you production by code by office.
Production by Codes - Provider *Reports (old) > Group Reports > Management Reports > Production by Codes - Provider* *Run Monthly, Quarterly, Yearly	Insight to providers' revenue stream. Report can be used as a touchpoint for clinical education. Report gives you production by code by provider.	Select Date Range Can select specific Provider(s) if needed.
Production by Category *Reports (old) > Group Reports > Management Reports > Production by Category* *Run Monthly, Quarterly, Yearly	Report can be used to give you a high level overview of how much production each category is bringing in for your organization. Report gives you production by category for all offices.	Select Date Range Select Categories, if applicable.