

# CLOSING THE YEAR IN DENTRIX

PRESENTED BY CHARLOTTE SKAGGS



THE WEBINAR WILL BEGIN SOON...

# 10:00

Start Stop Reset mins: 10 secs: 0 type: None

Breaktime for PowerPoint by Flow Simulation Ltd.  Pin controls when stopped

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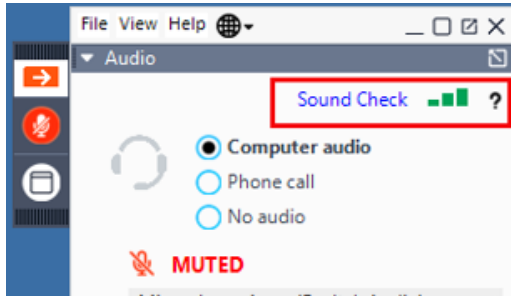


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## WEBINAR CONTROLS



Use the Sound Check to test your audio for the webinar.



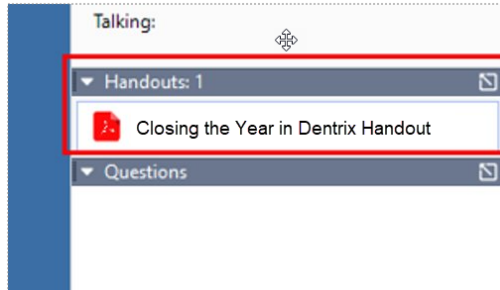
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## WEBINAR CONTROLS



Click the PDF link to download the webinar handout.



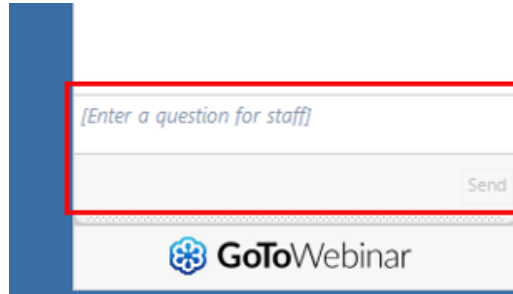
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## WEBINAR CONTROLS



To ask a question type your question in the box.



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## MEET ASHLEY WATKINS



Senior Product Manager for Dentrix, Dentrix Canada, Dentrix Voice, and Dentrix Imaging Center

- Identifies problems to be solved and translates those into features
- Works with engineering and coordinating all departments for Dentrix releases
- Values innovation, hard work, and forward-thinking



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**PRESENTER:  
CHARLOTTE SKAGGS**



**Founder of Vector Dental Consulting**

A practice management firm focused on taking offices to the next level.



**Co-Owned and Managed a Successful Dental Practice**

With 17 years' experience, she has unique approach to consulting.



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**PRESENTER:  
CHARLOTTE SKAGGS**

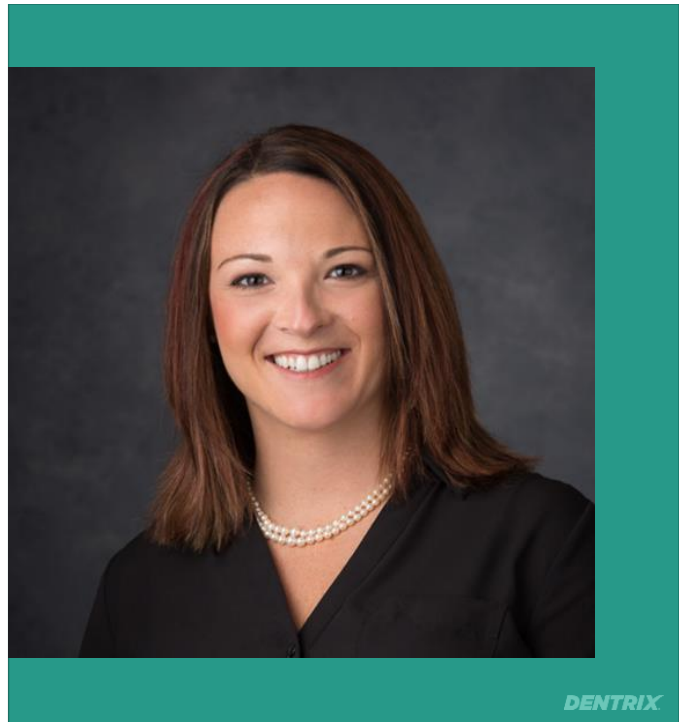


**Dentrix User**

Has been using Dentrix for over 20 years and is a Certified Dentrix trainer.



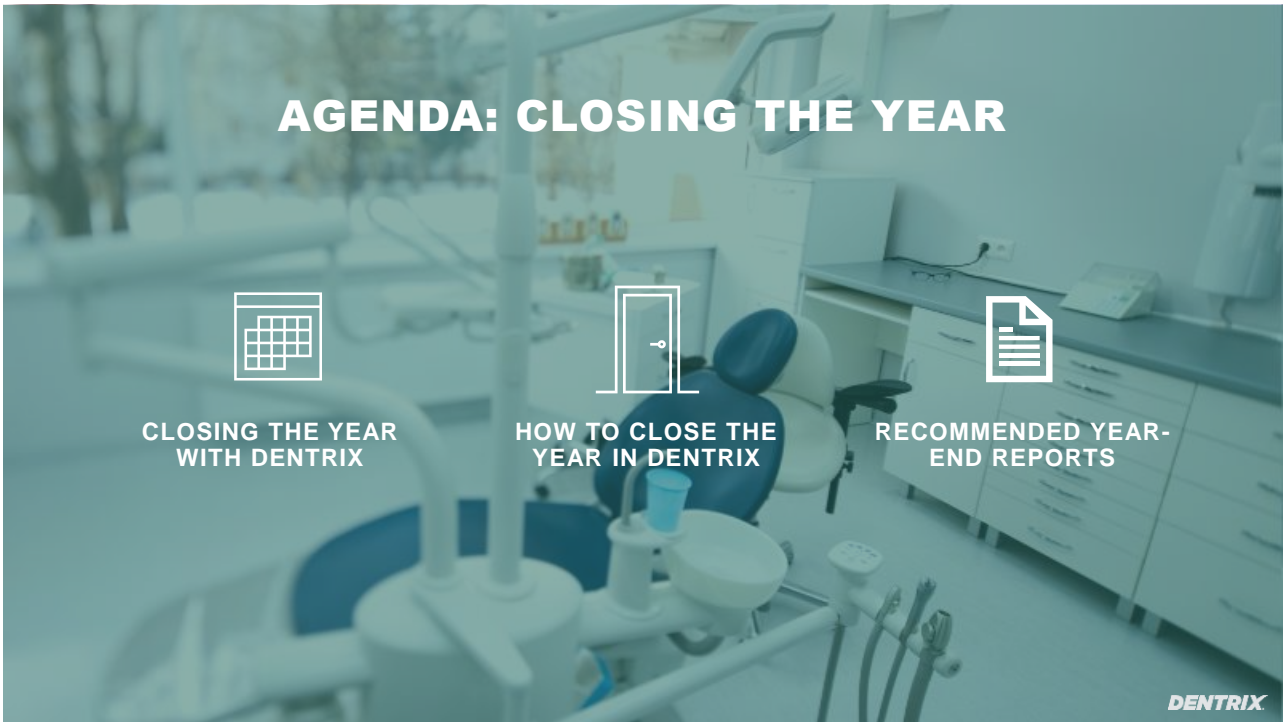
**Featured Columnist  
for Dentrix Magazine**



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## WHAT DOES IT MEAN: CLOSE THE YEAR?

- Same as closing any month.
- **Closing December = Closing Year**

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## WHAT DOES IT MEAN: CLOSE THE YEAR?

- **Required:**
  - Completed procedures, periodontal exams, and unsigned clinical notes are moved to history
  - Insurance benefits are reset
- **Optional:**
  - Purge Appointments / Events
  - Apply Finance and Late charges
  - Process Future Due Payment Plan charges and create claims

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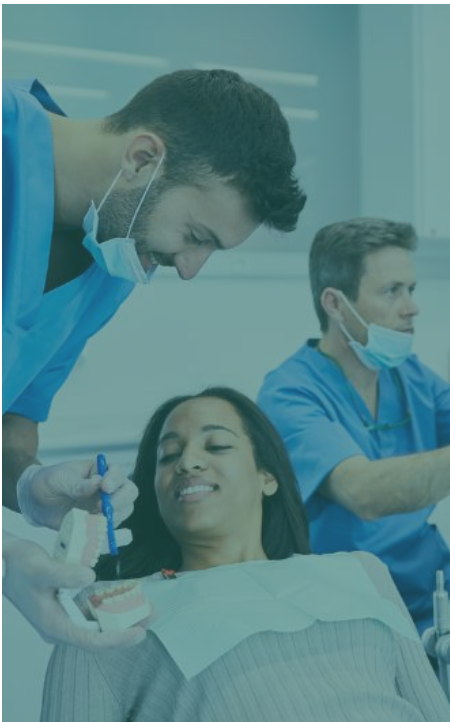
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**WHEN TO CLOSE THE YEAR**

- On or after first day of the new month
- Close when you are ready
- Review day sheets > Confirm transactions are correct
- Confirm all procedures have been entered and allocated correctly
- Confirm clinical notes have been created
- Close the month regularly to keep up-to-date



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**WHY CLOSING IS IMPORTANT**

**AGES ACCOUNTS RECEIVABLES**

Without closing, everything appears in 0-29 days aging bucket.

**DISPLAYS CURRENT TRANSACTIONS IN THE LEDGER**

Ledger will be cluttered with older information instead of recent procedures.

**MORE ACCURATE INSURANCE ESTIMATES**

Resets benefits and maximums for the year.

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## WHY CLOSING IS IMPORTANT

### MORE ACCURATE REPORT DATA

Accounts that are properly aged will get better month and year-to-date data.

### TRANSACTIONS ARE LOCKED AND MOVED

Transactions, clinical notes, and perio exams are susceptible to changes until the month is closed.

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## HOW TO CLOSE THE YEAR IN DENTRIX

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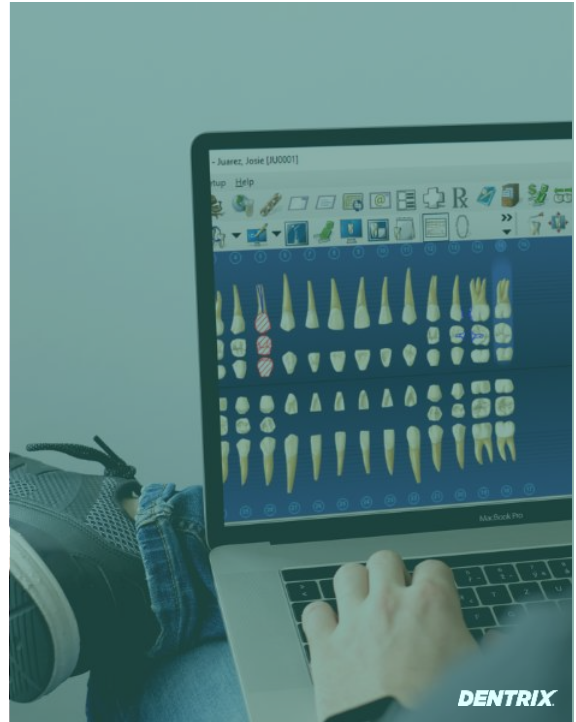
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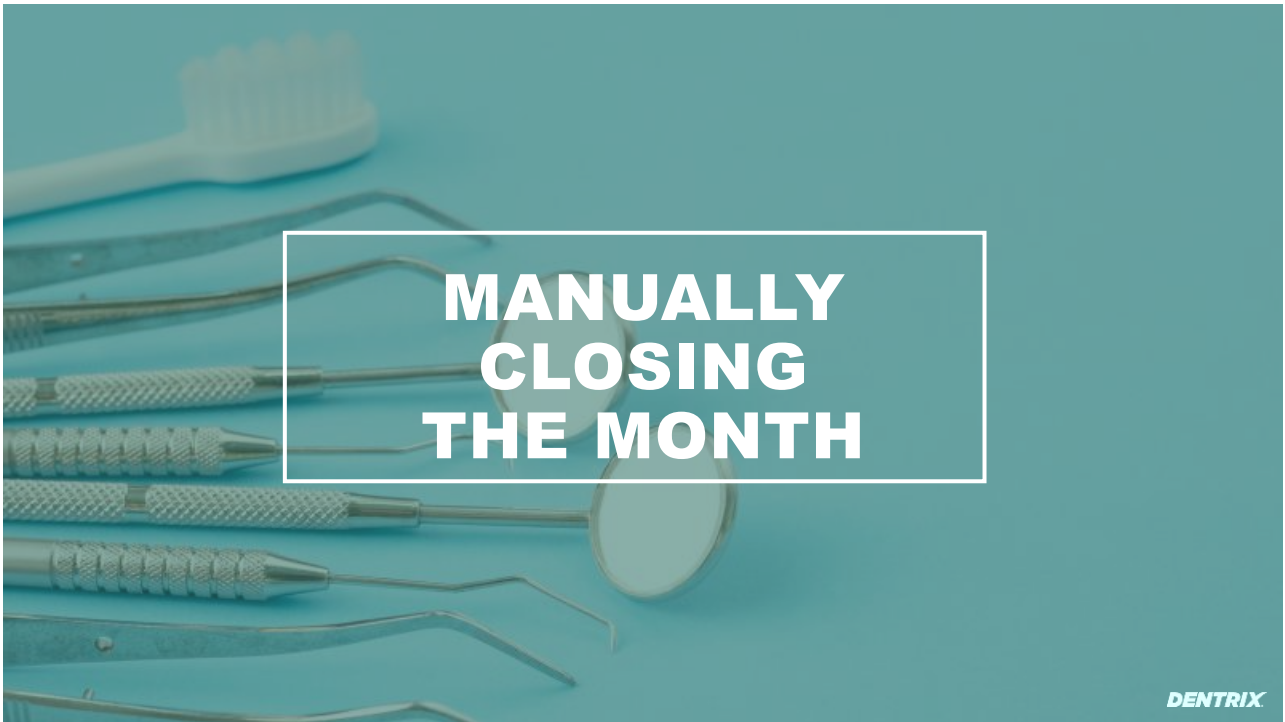
## CLOSING THE MONTH

In this webinar, we will cover closing the month/year in:

**MANUALLY  
AND  
AUTOMATICALLY**



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**Before you Begin...**

**MANUALLY CLOSING THE MONTH**

- Ensure database is backed up
- Wait until first day of month
- **Recommended:** Close Dentrix on all computers
- **Recommended:** Run month end on server computer

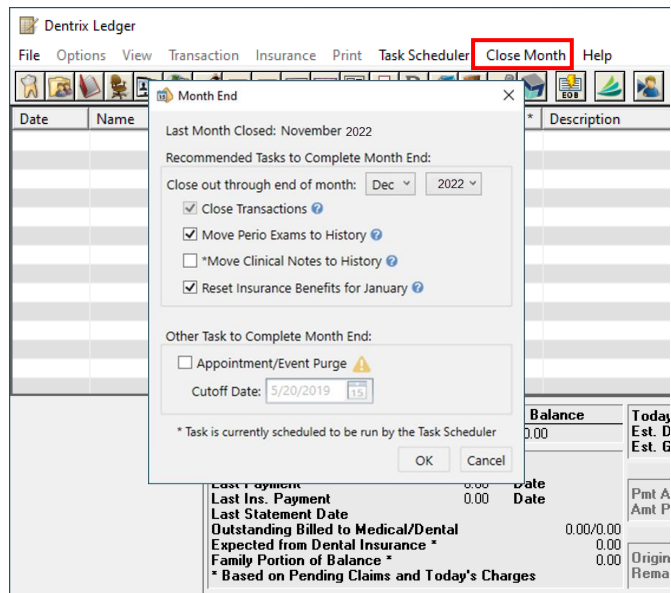


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**MANUALLY CLOSING THE MONTH**

**STEP 1: DECIDE MONTH**

1. Click Close Month

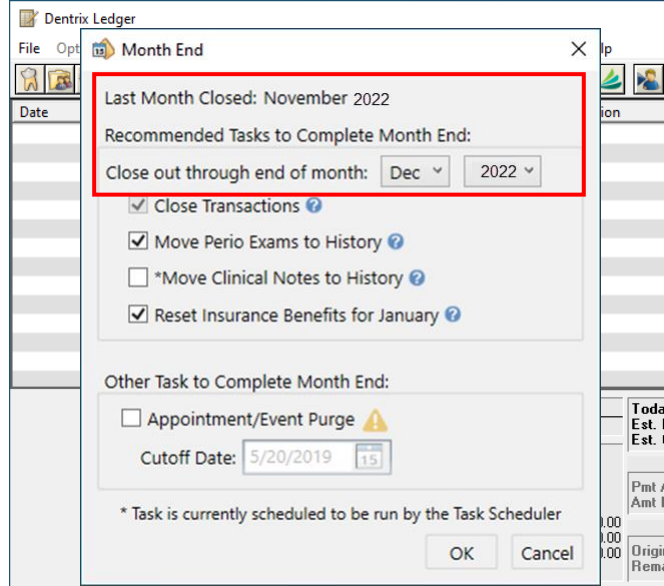


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# MANUALLY CLOSING THE MONTH

## STEP 1: DECIDE MONTH

1. Click Close Month
2. Review last closed month
3. Choose month/year
  1. Default will be last month closed
  2. Can close multiple months
  3. Wait for new month to close



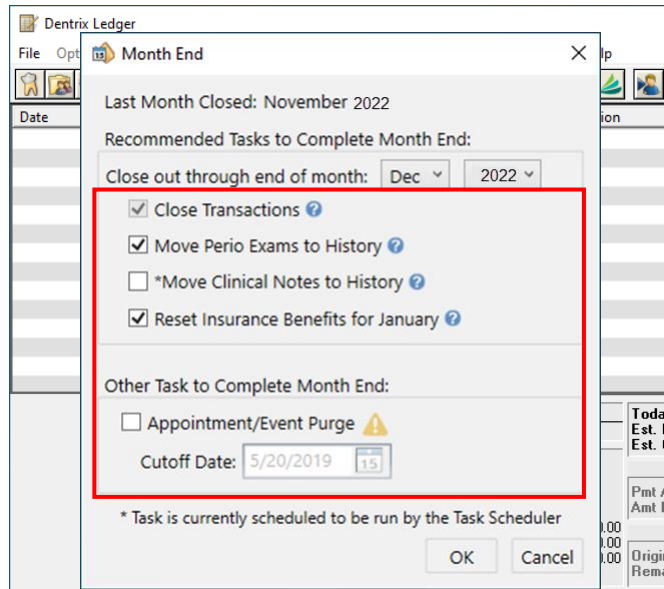
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# MANUALLY CLOSING THE MONTH

## STEP 2: SELECT MONTH END TASKS

1. Choose tasks
2. Select cutoff for purge appointments

\* Asterisk = Scheduled in Task Scheduler



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## ONLINE HELP LINKS



**Video:** [Dentrix G7.5 Close Month](#)

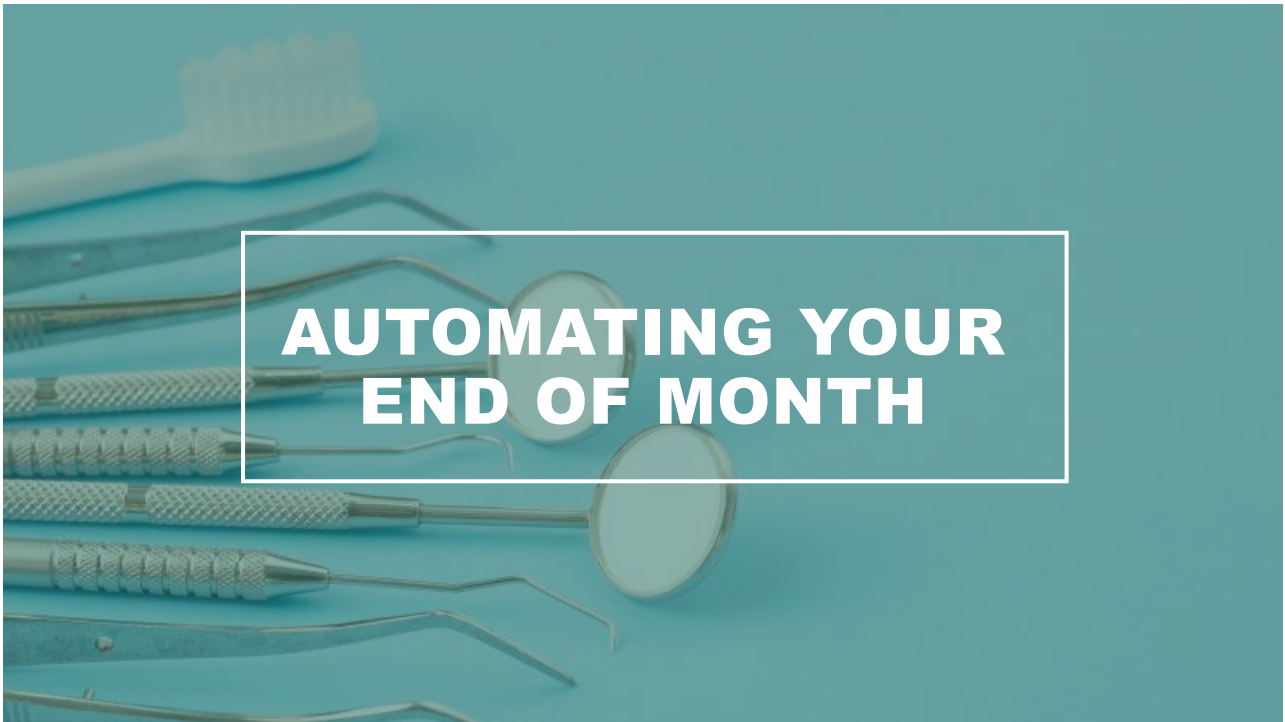


**Article:** [Month End Options in One Click! Using the New Close Month Window](#)



**Article:** [What You Need to Know to Close the Year in Dentrix](#)

The screenshot shows the 'Dentrix G7.5 Close Month' help page. At the top, it features the logos for HENRY SCHEIN ONE and DENTRIX. The main heading is 'Dentrix G7.5 Close Month'. Below this, there is introductory text: 'By popular request, Dentrix has reintroduced a single window where you can run the most common month end tasks. Duration: 1:32. Click here to view a recording of our Closing the Year in Dentrix webinar. Make sure you download the webinar handout that goes with the on-demand webinar.' A play button icon is visible. The central part of the screenshot is a screenshot of the 'Month End' software window. This window displays 'Last Month Closed: November 2018' and 'Recommended Tasks to Complete Month End:'. Under 'Close out through end of month:', it shows 'Dec' and '2018'. The tasks listed are: 'Close Transactions' (checked), 'Move Period Exams to History' (checked), 'Move Clinical Notes to History' (unchecked), and 'Reset Insurance Benefits for January' (checked). Under 'Other Task to Complete Month End:', there is an option for 'Appointment/Event Purge' (unchecked) with a 'Cutoff Date' set to '11/30/2018'. A note at the bottom states '\* Task is currently scheduled to be run by the Task Scheduler'. At the bottom of the help page, there are icons for a calendar, a padlock, a document, and a first aid kit, followed by the heading 'Additional Information' and two article links: 'Article: Month End Options in One Click! The New Month End Window' and 'Tip: Make Sure You Complete These Tasks When Closing the Month in Dentrix'. The DENTRIX logo is in the bottom right corner.

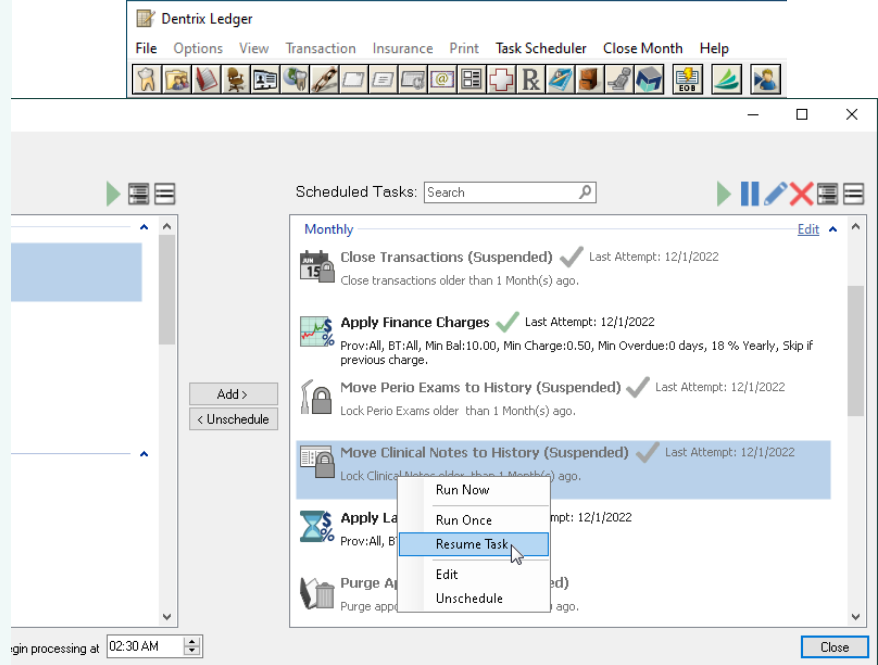




**STEP BY STEP**

**STEP 1: DECIDE MONTH**

1. Click Task Scheduler
2. Locate "Monthly" Queue
3. Right-click on tasks:
  - Resume
  - Suspend
  - Edit



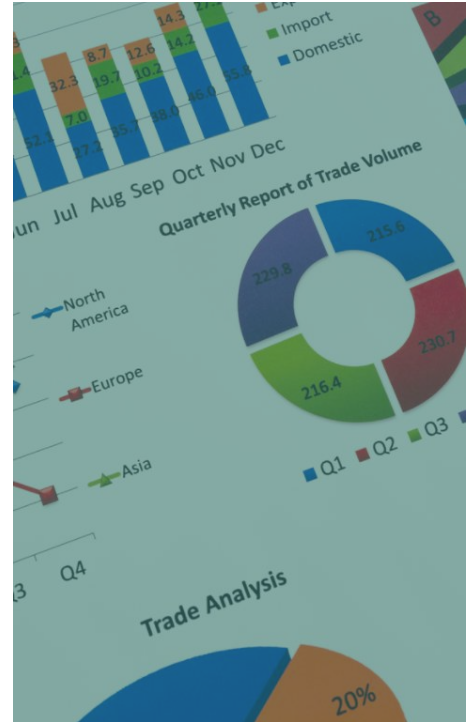
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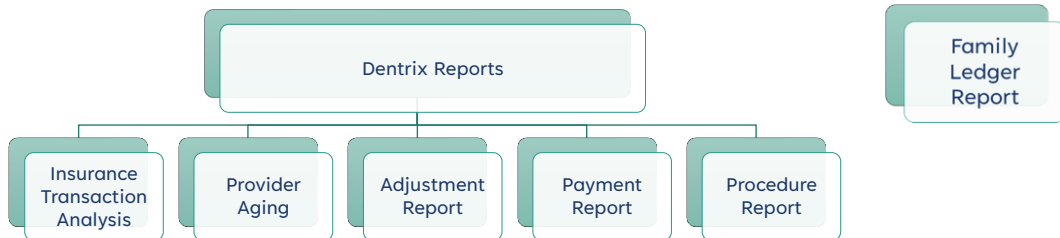
## WHY RUN YEAR-END REPORTS?



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## WHICH REPORTS SHOULD I RUN?



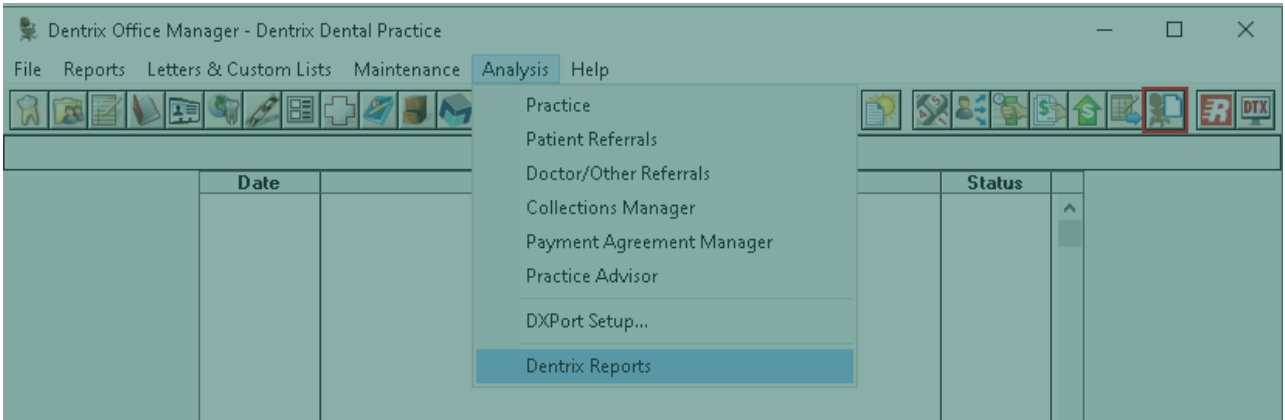
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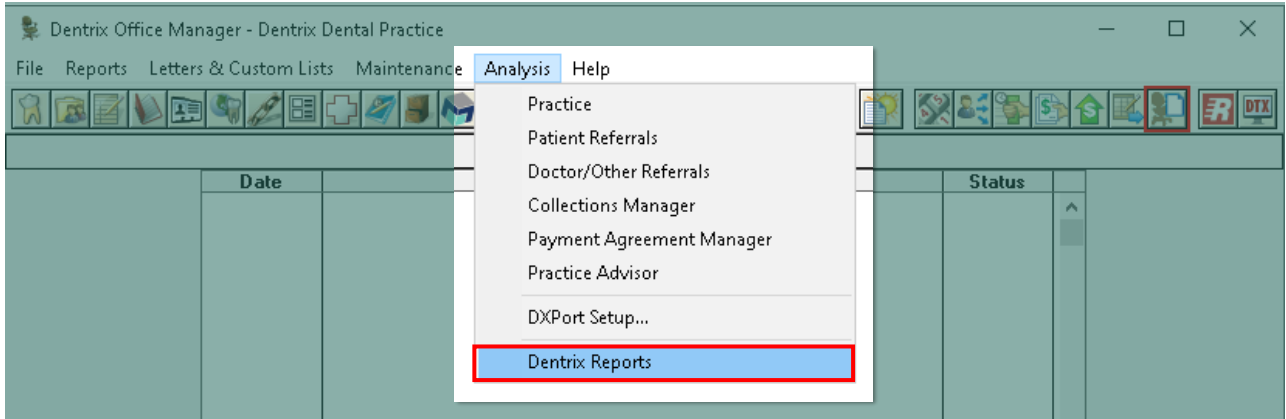
## LOCATING DENTRIX REPORTS



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**LOCATING DENTRIX REPORTS**

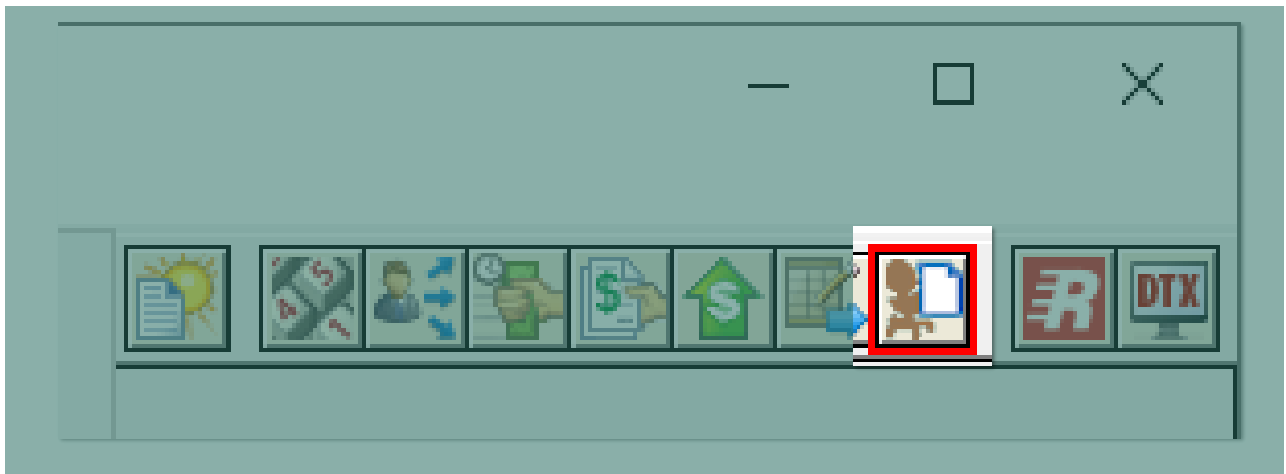
Office Manager > Click Analysis > Dentrix Reports



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**LOCATING DENTRIX REPORTS**

Office Manager > Click Analysis > Dentrix Reports  
Or  
Click the Dentrix Reports toolbar button



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**HOW TO USE THE REPORT WINDOW**

**Adjustment Summary** by entry date  
all providers all billing types

**Adjustments for 01/01/2022 - 10/31/2022**

Prov	Quantity	Total \$	Avg \$	% of Total \$	YTD Qty	YTD Total \$	YTD Avg \$	YTD %
<b>Charges</b>								
[P]+Charge Adjustment	24	4,647.00	193.63	10.56%	24	4,647.00	193.63	10.56%
DDS1	6	711.00	118.50	6.15%	6	711.00	118.50	6.15%
DDS2	11	2,433.00	221.18	15.43%	11	2,433.00	221.18	15.43%
DDS3	5	1,323.00	264.60	16.37%	5	1,323.00	264.60	16.37%
ENDO	1	73.00	73.00	1.98%	1	73.00	73.00	1.98%
SURG	1	107.00	107.00	8.99%	1	107.00	107.00	8.99%
[P]+Collected - Bad Debt	23	5,921.00	257.43	13.46%	23	5,921.00	257.43	13.46%
DDS1	8	2,066.00	258.25	17.88%	8	2,066.00	258.25	17.88%
DDS2	4	1,716.00	429.00	10.88%	4	1,716.00	429.00	10.88%
DDS3	6	1,603.00	267.17	19.84%	6	1,603.00	267.17	19.84%
ENDO	3	322.00	107.33	8.72%	3	322.00	107.33	8.72%
ORTH	1	95.00	95.00	3.57%	1	95.00	95.00	3.57%
SURG	1	119.00	119.00	10.00%	1	119.00	119.00	10.00%
[P]+Electronic Check Credit	11	1,727.00	157.00	3.93%	11	1,727.00	157.00	3.93%

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**HOW TO USE THE REPORT WINDOW**

A. Reports List

**Dentrix Reports**

Search

- Reports
- Accounts Receivable Trends Report
- Adjustment Summary
- Continuing Care Statistics
- Daily Provider Transactions Report**
- Insurance Payment Summary
- Insurance Transaction Analysis
- New Patient Summary
- Payment Summary
- Practice Goals Analysis
- Procedure Summary
- Provider Aging Report
- Referral Analysis
- Schedule Summary Report
- Scheduled Production Forecast

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**HOW TO USE THE REPORT WINDOW**

- A. Reports List
- B. List of generated reports and date generated

Date	Description	Status
11/29/2022...	Adjustment Summary	Ready
11/29/2022...	Daily Provider Transactions Report	Ready
11/29/2022...	Patient Overview	Ready



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**HOW TO USE THE REPORT WINDOW**

- A. Reports List
- B. List of generated reports and date generated
- C. Preview of the selected report

**Adjustment Summary** by entry date  
all providers all billing types

**Adjustments for 01/01/2022 - 10/31/2022**

	Prov	Quantity	Total \$	Avg \$	% of Total \$	YTD Qty	YTD
<b>Charges</b>							
[P]+Charge Adjustment		24	4,647.00	193.63	10.56%	24	
	DDS1	6	711.00	118.50	6.15%	6	
	DDS2	11	2,433.00	221.18	15.43%	11	
	DDS3	5	1,323.00	264.60	16.37%	5	
	ENDO	1	73.00	73.00	1.98%	1	
	SURG	1	107.00	107.00	8.99%	1	
[P]+Collected - Bad Debt		23	5,921.00	257.43	13.46%	23	
	DDS1	8	2,066.00	258.25	17.88%	8	
	DDS2	4	1,716.00	429.00	10.88%	4	
	DDS3	6	1,603.00	267.17	19.84%	6	
	ENDO	3	322.00	107.33	8.72%	3	
	ORTH	1	95.00	95.00	3.57%	1	
	SURG	1	119.00	119.00	10.00%	1	
[P]+Electronic Check Credit		11	1,727.00	157.00	3.93%	11	
	DDS1	2	313.00	156.50	2.71%	2	
	DDS2	2	565.00	282.50	3.58%	2	
	DDS3	1	93.00	93.00	1.15%	1	
	ENDO	4	509.00	127.25	13.79%	4	
	ORTH	1	54.00	54.00	2.03%	1	
	SURG	1	103.00	103.00	1.23%	1	



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## ADJUSTMENT SUMMARY

**Adjustment Summary** by entry date  
all providers all billing types

Adjustments for 01/01/2022 - 10/31/2022

	Prov	Quantity	Total \$	Avg \$	% of Total \$	YTD Qty	YTD Total \$	YTD Avg \$	YTD %
<b>Charges</b>									
[P]+Charge Adjustment		24	4,647.00	193.63	10.56%	24	4,647.00	193.63	10.56%
	DDS1	6	711.00	118.50	6.15%	6	711.00	118.50	6.15%
	DDS2	11	2,433.00	221.18	15.43%	11	2,433.00	221.18	15.43%
	DDS3	5	1,323.00	264.60	16.37%	5	1,323.00	264.60	16.37%
	ENDO	1	73.00	73.00	1.98%	1	73.00	73.00	1.98%
	SURG	1	107.00	107.00	8.99%	1	107.00	107.00	8.99%
[P]+Collected - Bad Debt		23	5,921.00	257.43	13.46%	23	5,921.00	257.43	13.46%
	DDS1	8	2,066.00	258.25	17.88%	8	2,066.00	258.25	17.88%
	DDS2	4	1,716.00	429.00	10.88%	4	1,716.00	429.00	10.88%

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### ADJUSTMENT SUMMARY

CREDITS TOTALS	Prov	Quantity	Total \$	Avg \$	% of Total \$	YTD Qty	YTD Total \$	YTD Avg \$	YTD %
	ALL	289	-49,580.20	-171.56	100%	289	-49,580.20	-171.56	100%
	DDS1	85	-15,166.96	-178.43	30.59%	85	-15,166.96	-178.43	30.59%
	DDS2	62	-17,632.00	-284.39	35.56%	62	-17,632.00	-284.39	35.56%
	DDS3	52	-7,634.00	-146.81	15.40%	52	-7,634.00	-146.81	15.40%
	ENDO	31	-3,642.00	-117.48	7.35%	31	-3,642.00	-117.48	7.35%
	HYG6	3	-18.00	-6.00	0.04%	3	-18.00	-6.00	0.04%
	ORTH	20	-2,687.00	-134.35	5.42%	20	-2,687.00	-134.35	5.42%
	SURG	11	-1,220.00	-110.91	2.46%	11	-1,220.00	-110.91	2.46%

**GRAND TOTALS**

TOTAL Charge Adjustments to Production	43,992.00
TOTAL Charge Adjustments to Collections	0.00
<b>TOTAL Charge Adjustments</b>	<b>43,992.00</b>
TOTAL Credit Adjustments to Production	0.00

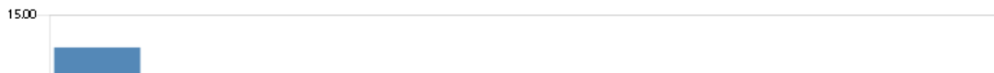
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### ADJUSTMENT SUMMARY

GRAND TOTALS	
TOTAL Charge Adjustments to Production	43,992.00
TOTAL Charge Adjustments to Collections	0.00
<b>TOTAL Charge Adjustments</b>	<b>43,992.00</b>
TOTAL Credit Adjustments to Production	0.00
TOTAL Credit Adjustments to Collections	-49,580.20
<b>TOTAL Credit Adjustments</b>	<b>-49,580.20</b>
<b>TOTAL Adjustments to Production</b>	<b>43,992.00</b>
<b>TOTAL Adjustments to Collections</b>	<b>-49,580.20</b>

### Charge Adjustment Amounts by Type for Date Range (Top 10)

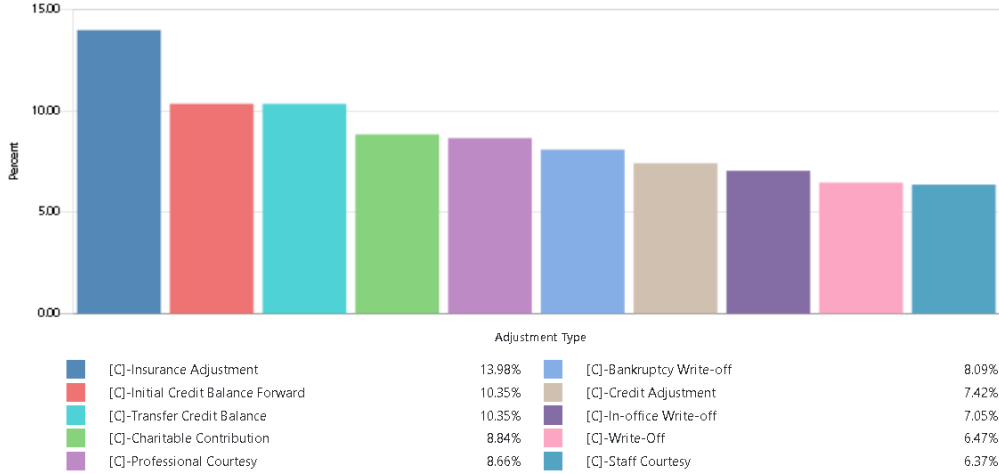


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### ADJUSTMENT SUMMARY

#### Credit Adjustment Amounts by Type for Year-to-Date (Top 10)



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### PROCEDURE SUMMARY

#### Procedure Summary by entry date

all providers all billing types

Completed procedures for 06/01/2022 - 06/30/2022

Code	Prov	Quantity	Total \$	Avg \$	% of Total \$	YTD Qty	YTD Total \$	YTD Avg \$	YTD %
<b>Diagnostic</b>		140	8,617.00	61.55	9.14%	316	17,932.00	56.75	14.50%
D0120		69	3,174.00	46.00	3.37%	177	8,142.00	46.00	6.58%
	DDS1	27	1,242.00	46.00	7.20%	59	2,714.00	46.00	13.57%
	DDS2	14	644.00	46.00	2.34%	44	2,024.00	46.00	6.06%
	DDS3	24	1,104.00	46.00	3.21%	67	3,082.00	46.00	7.31%
	HYG1	1	46.00	46.00	1.81%	1	46.00	46.00	1.17%
	HYG3	3	138.00	46.00	4.28%	3	138.00	46.00	2.69%
	HYG5	0	0.00	0.00	0.00%	2	92.00	46.00	2.07%
	PEDO	0	0.00	0.00	0.00%	1	46.00	46.00	100.00%
D0150		8	640.00	80.00	0.68%	10	800.00	80.00	0.65%
	DDS1	1	80.00	80.00	0.46%	3	240.00	80.00	1.20%
	DDS2	4	320.00	80.00	1.16%	4	320.00	80.00	0.96%
	DDS3	3	240.00	80.00	0.70%	3	240.00	80.00	0.57%

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**PROCEDURE SUMMARY**

**Procedure Summary** by entry date  
all providers all billing types

Completed procedures for 06/01/2022 - 06/30/2022

Code	Prov	Quantity	Total \$	Avg \$	% of Total \$	YTD Qty	YTD Total \$	YTD Avg \$	YTD %
<b>Diagnostic</b>		140	8,617.00	61.55	9.14%	316	17,932.00	56.75	14.50%
D0120		69	3,174.00	46.00	3.37%	177	8,142.00	46.00	6.58%
DDS1		27	1,242.00	46.00	7.20%	59	2,714.00	46.00	13.57%
DDS2		14	644.00	46.00	2.34%	44	2,024.00	46.00	6.06%
DDS3		24	1,104.00	46.00	3.21%	67	3,082.00	46.00	7.31%
HYG1		1	46.00	46.00	1.81%	1	46.00	46.00	1.17%
HYG3		3	138.00	46.00	4.28%	3	138.00	46.00	2.69%
HYG5		0	0.00	0.00	0.00%	2	92.00	46.00	2.07%
PEDO		0	0.00	0.00	0.00%	1	46.00	46.00	100.00%
D0150		8	640.00	80.00	0.68%	10	800.00	80.00	0.65%
DDS1		1	80.00	80.00	0.46%	3	240.00	80.00	1.20%
DDS2		4	320.00	80.00	1.16%	4	320.00	80.00	0.96%
DDS3		3	240.00	80.00	0.70%	3	240.00	80.00	0.57%

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**PROCEDURE SUMMARY**

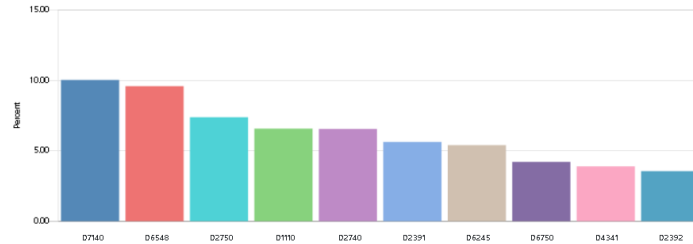
GRAND TOTALS

Prov	Quantity	Total \$	Avg \$	% of Total \$	YTD Qty	YTD Total \$	YTD Avg \$	YTD %
ALL	447	94,257.00	210.87	100%	765	123,705.00	161.71	100%
DDS1	68	17,245.00	253.60	18.30%	117	20,002.00	170.96	16.17%
DDS2	113	27,479.00	243.18	29.15%	158	33,386.00	211.30	26.99%
DDS3	125	34,436.00	275.49	36.53%	189	42,169.00	223.12	34.09%
DR99	0	0.00	0.00	0.00%	1	50.00	50.00	0.04%
HYG1	31	2,546.00	82.13	2.70%	49	3,920.00	80.00	3.17%
HYG2	32	5,288.00	165.25	5.61%	72	9,042.00	125.58	7.31%
HYG3	33	3,224.00	97.70	3.42%	57	5,125.00	89.91	4.14%
HYG4<1>	0	0.00	0.00	0.00%	20	1,478.00	73.90	1.19%
HYG5	28	2,348.00	83.86	2.49%	57	4,439.00	77.88	3.59%
HYG6	11	916.00	83.27	0.97%	33	2,594.00	78.61	2.10%
ORTH	1	0.00	0.00	0.00%	2	59.00	29.50	0.05%
PEDO	0	0.00	0.00	0.00%	1	46.00	46.00	0.04%
SURG	5	775.00	155.00	0.82%	9	1,395.00	155.00	1.13%

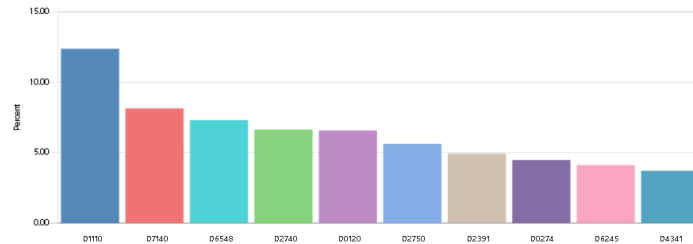
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### PROCEDURE SUMMARY

Completed Procedures for Date Range (Top 10)



Completed Procedures for Year-to-Date (Top 10)



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### PAYMENT SUMMARY

**Payment Summary** by entry date  
all providers all billing types

Payments for 07/01/2022 - 07/31/2022

	Prov	Quantity	Total \$	Avg \$	% of Total \$	YTD Qty	YTD Total \$	YTD Avg \$	YTD %
Cash Payment - Thank You		8	-1,430.00	-178.75	3.37%	14	-1,774.60	-126.76	3.54%
	DDS1	1	-400.00	-400.00	5.90%	2	-410.00	-205.00	5.30%
	DDS2	4	-817.12	-204.28	11.30%	5	-867.12	-173.42	10.90%
	DDS3	0	0.00	0.00	0.00%	2	-185.12	-92.56	1.17%
	HYG1	1	-4.00	-4.00	0.16%	2	-68.88	-34.44	2.22%
	HYG2	2	-208.88	-104.44	4.39%	2	-208.88	-104.44	3.70%
	HYG4 <1>	0	0.00	0.00	0.00%	1	-34.60	-34.60	3.68%
Check Payment - Thank You		5	-1,996.12	-399.22	4.70%	6	-2,024.12	-337.35	4.04%
	DDS1	3	-850.00	-283.33	12.54%	3	-850.00	-283.33	11.00%
	DDS2	1	-107.12	-107.12	1.48%	2	-135.12	-67.56	1.70%
	HYG2	1	-1,039.00	-1,039.00	21.83%	1	-1,039.00	-1,039.00	18.39%
Check Pmt at Visit - Thank You		0	0.00	0.00	0.00%	2	-300.00	-150.00	0.60%

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## PAYMENT SUMMARY

### Payment Summary by entry date all providers all billing types

Payments for 07/01/2022 - 07/31/2022

	Prov	Quantity	Total \$	Avg \$	% of Total \$	YTD Qty	YTD Total \$	YTD Avg \$	YTD %
Cash Payment - Thank You		8	-1,430.00	-178.75	3.37%	14	-1,774.60	-126.76	3.54%
	DDS1	1	-400.00	-400.00	5.90%	2	-410.00	-205.00	5.30%
	DDS2	4	-817.12	-204.28	11.30%	5	-867.12	-173.42	10.90%
	DDS3	0	0.00	0.00	0.00%	2	-185.12	-92.56	1.17%
	HYG1	1	-4.00	-4.00	0.16%	2	-68.88	-34.44	2.22%
	HYG2	2	-208.88	-104.44	4.39%	2	-208.88	-104.44	3.70%
	HYG4<1>	0	0.00	0.00	0.00%	1	-34.60	-34.60	3.68%
Check Payment - Thank You		5	-1,996.12	-399.22	4.70%	6	-2,024.12	-337.35	4.04%
	DDS1	3	-850.00	-283.33	12.54%	3	-850.00	-283.33	11.00%
	DDS2	1	-107.12	-107.12	1.48%	2	-135.12	-67.56	1.70%
	HYG2	1	-1,039.00	-1,039.00	21.83%	1	-1,039.00	-1,039.00	18.39%
Check Pmt at Visit - Thank You		0	0.00	0.00	0.00%	2	-300.00	-150.00	0.60%

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## PAYMENT SUMMARY

### Payment Summary by entry date all providers all billing types

Payments for 07/01/2022 - 07/31/2022

	Prov	Quantity	Total \$	Avg \$	% of Total \$	YTD Qty	YTD Total \$	YTD Avg \$	YTD %
Cash Payment - Thank You		8	-1,430.00	-178.75	3.37%	14	-1,774.60	-126.76	3.54%
	DDS1	1	-400.00	-400.00	5.90%	2	-410.00	-205.00	5.30%
	DDS2	4	-817.12	-204.28	11.30%	5	-867.12	-173.42	10.90%
	DDS3	0	0.00	0.00	0.00%	2	-185.12	-92.56	1.17%
	HYG1	1	-4.00	-4.00	0.16%	2	-68.88	-34.44	2.22%
	HYG2	2	-208.88	-104.44	4.39%	2	-208.88	-104.44	3.70%
	HYG4<1>	0	0.00	0.00	0.00%	1	-34.60	-34.60	3.68%
Check Payment - Thank You		5	-1,996.12	-399.22	4.70%	6	-2,024.12	-337.35	4.04%
	DDS1	3	-850.00	-283.33	12.54%	3	-850.00	-283.33	11.00%
	DDS2	1	-107.12	-107.12	1.48%	2	-135.12	-67.56	1.70%
	HYG2	1	-1,039.00	-1,039.00	21.83%	1	-1,039.00	-1,039.00	18.39%
Check Pmt at Visit - Thank You		0	0.00	0.00	0.00%	2	-300.00	-150.00	0.60%

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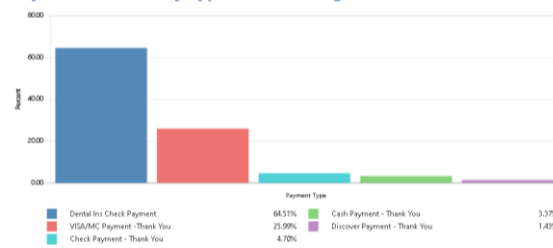
**PAYMENT SUMMARY**

Prov	Quantity	Total \$	Avg \$	% of Total \$	YTD Qty	YTD Total \$	YTD Avg \$	YTD %
HYG3	1	-513.00	-513.00	14.33%	1	-513.00	-513.00	12.71%
HYG5	1	-186.00	-186.00	9.34%	1	-186.00	-186.00	7.59%
<b>TOTALS</b>								
ALL	201	-42,481.29	-211.35	100%	275	-50,085.79	-182.13	100%
DDS1	38	-6,780.23	-178.43	15.96%	49	-7,729.43	-157.74	15.43%
DDS2	38	-7,233.38	-190.35	17.03%	49	-7,955.38	-162.35	15.88%
DDS3	39	-13,083.00	-335.46	30.80%	60	-15,882.82	-264.71	31.71%
HYG1	15	-2,517.90	-167.86	5.93%	20	-3,099.78	-154.99	6.19%
HYG2	23	-4,758.48	-206.89	11.20%	32	-5,651.28	-176.60	11.28%
HYG3	20	-3,579.30	-178.97	8.43%	25	-4,037.30	-161.49	8.06%
HYG4<1>	5	-531.80	-106.36	1.25%	9	-939.40	-104.38	1.88%
HYG5	14	-1,991.60	-142.26	4.69%	18	-2,449.60	-136.09	4.89%
HYG6	7	-889.60	-127.09	2.09%	10	-1,177.60	-117.76	2.35%
ORTH	0	0.00	0.00	0.00%	1	-47.20	-47.20	0.09%
SURG	2	-1,116.00	-558.00	2.63%	2	-1,116.00	-558.00	2.23%

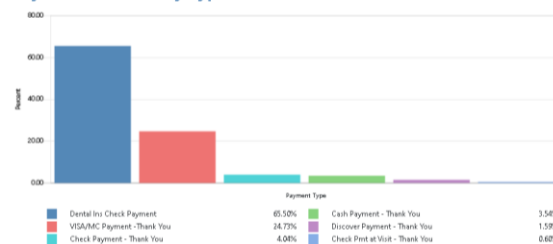
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**PAYMENT SUMMARY**

Payment Amounts by Type for Date Range



Payment Amounts by Type for Year-To-Date



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## PROVIDER AGING

Provider Aging Report <small>by procedure date</small>														
<small>all providers all billing types</small>														
Aged balances as of 08/01/2022														
Guarantor Name	Last Stmt	Pmt Agr	Gu	Pmts	Last Guar	Last Ins	Current	-Past-	-Past-	-Past-	-Past-	-Past-	Billed to	Balance
Phone	Chart #	BT	Due	< 30 days	Pmt	Pmt	0-30	31-60	61-90	91-120	121-150	151-180	> 180	Insurance
*Abbott, Ken S	05/26/22													
(801)797-1586	AB0001	4					0.00	0.00	0.00	0.00	0.00	0.00	530.00	530.00
						DDS1	0.00	0.00	0.00	0.00	0.00	0.00	530.00	530.00
*Adkins, Ayaan														
	AD0004	1					190.00	0.00	0.00	0.00	0.00	0.00	0.00	190.00
						DDS1	46.00	0.00	0.00	0.00	0.00	0.00	0.00	46.00
						HYG1	144.00	0.00	0.00	0.00	0.00	0.00	0.00	144.00
*Albrecht, Maria														
	AL0033	1					131.00	0.00	0.00	0.00	0.00	0.00	0.00	131.00
						DDS1	46.00	0.00	0.00	0.00	0.00	0.00	0.00	46.00
						HYG1	85.00	0.00	0.00	0.00	0.00	0.00	0.00	85.00
*Alexander, Lyla						NA								
	AL0011	1					0.00	0.00	1,119.00	0.00	0.00	0.00	0.00	NA
						DDS1	0.00	0.00	80.00	0.00	0.00	0.00	0.00	80.00
						HYG2	0.00	0.00	1,039.00	0.00	0.00	0.00	0.00	1,039.00
*Alonso, Tabitha						NA								
						HYG2	0.00	0.00	144.00	0.00	0.00	0.00	0.00	144.00

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## PROVIDER AGING

				131.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	131.00	131.00
				DDS1	46.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	46.00	46.00
				HYG1	85.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	85.00	85.00
				NA										
					0.00	0.00	1,119.00	0.00	0.00	0.00	0.00	0.00	NA	1,119.00
				DDS1	0.00	0.00	80.00	0.00	0.00	0.00	0.00	0.00	0.00	80.00
				HYG2	0.00	0.00	1,039.00	0.00	0.00	0.00	0.00	0.00	0.00	1,039.00
				NA										
					0.00	0.00	144.00	0.00	0.00	0.00	0.00	0.00	0.00	144.00
				85.00										
				07/12/22	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
				DDS1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
				HYG3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
				15,000.00										
				04/13/19	-15,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-15,000.00
				DR99	-15,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-15,000.00

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## PROVIDER AGING

			DDS1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
			HYG3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
				15,000.00							
00002	4	04/13/19		-15,000.00	0.00	0.00	0.00	0.00	0.00	0.00	-15,000.00
			DR99	-15,000.00	0.00	0.00	0.00	0.00	0.00	0.00	-15,000.00

Provider		Current 0-30	-Past- 31-60	-Past- 61-90	-Past- 91-120	-Past- 121-150	-Past- 151-180	-Past- > 180	Billed to Insurance	Balance
ALL	<b>Total</b>	5,050.45	77,515.66	11,183.90	1,310.00	31.00	0.00	6,401.00	37,748.00	101,492.01
	<b>Percent</b>	4.98%	76.38%	11.02%	1.29%	0.03%	0.00%	6.31%	37.19%	100%
DDS1 Smith, Dennis	<b>Total</b>	4,282.21	12,718.20	1,051.20	92.00	0.00	0.00	5,631.00	10,918.00	23,774.61
	<b>Percent</b>	18.01%	53.49%	4.42%	0.39%	0.00%	0.00%	23.68%	45.92%	100%
DDS2 Smith Junior, Dennis	<b>Total</b>	5,818.92	23,920.70	3,394.00	276.00	0.00	0.00	580.00	10,536.00	33,969.62
	<b>Percent</b>	17.12%	70.38%	9.99%	0.81%	0.00%	0.00%	1.71%	31.00%	100%
DDS3 Cook, Maria	<b>Total</b>	1,734.40	32,509.20	2,005.70	92.00	10.88	0.00	190.00	7,386.00	36,542.18
	<b>Percent</b>	4.75%	88.96%	5.49%	0.25%	0.03%	0.00%	0.52%	20.21%	100%
DR99 DentrixDental, Practice	<b>Total</b>	-15,000.00	0.00	50.00	0.00	0.00	0.00	0.00	0.00	-14,950.00
	<b>Percent</b>	100.33%	0.00%	-0.33%	0.00%	0.00%	0.00%	0.00%	0.00%	100%
HYG1 Hayes, Sally	<b>Total</b>	1,624.80	1,344.10	338.00	170.00	20.12	0.00	0.00	2,110.00	3,497.02
	<b>Percent</b>	46.46%	38.44%	9.67%	4.86%	0.58%	0.00%	0.00%	60.34%	100%
HYG2 Chen, Malachi	<b>Total</b>	1,812.92	3,037.00	1,850.80	170.00	0.00	0.00	0.00	1,353.00	6,870.72

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## INSURANCE TRANSACTION ANALYSIS

### Dental Insurance Transaction Analysis by claim sent date

all providers all billing types

Claims for 01/01/2022 - 10/31/2022

American Western Life Group Name **Circuit City**  
Group # **98552**

Patient Name	Birth Date	Sent	Received	Billed	Estimated	Paid	Cr Adj	Chg Adj	Net Amt	Prov	Secondary
Douglas, Aniyah	11/12/1940	05/27/2022	07/15/2022	131.00	81.00	-81.00	0.00		50.00	DDS2	none
<b>TOTALS</b>	<b># Sent</b>	<b># Rec'd</b>	<b># Pmts</b>	<b># Cr Adj</b>	<b># Chg Adj</b>	<b>Billed</b>	<b>Estimated</b>	<b>Paid</b>	<b>Cr Adj</b>	<b>Chg Adj</b>	<b>Net Amt</b>
	1	1	1	0	0	131.00	81.00	-81.00	0.00	0.00	50.00

Boon Dental Insurance Plans Group Name **Tier 1**  
Group # **84767**

Patient Name	Birth Date	Sent	Received	Billed	Estimated	Paid	Cr Adj	Chg Adj	Net Amt	Prov	Secondary
Hurley, Rylan	12/08/1971	05/16/2022	06/02/2022	190.00	190.00	-190.00			0.00	DDS3	none
Hurst, Adalee	03/08/1942	05/25/2022	07/18/2022	131.00	131.00	-131.00			0.00	DDS2	none
Bonilla, Romina	10/02/1974	05/26/2022	06/02/2022	190.00	190.00	-190.00			0.00	DDS1	none
Irving, Marilyn	01/05/1934	05/26/2022	06/02/2022	131.00	131.00	-131.00			0.00	DDS3	none
Bonilla, Romina	10/02/1974	06/02/2022	07/18/2022	3,437.00	1,310.00	-1,852.00	0.00		1,585.00	DDS1	none

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### INSURANCE TRANSACTION ANALYSIS

1	1	1	0	0	131.00	81.00	-81.00	0.00	0.00	50.00	
<b>Boon Dental Insurance Plans</b>			Group Name <b>Tier 1</b>								
			Group # <b>84767</b>								
Patient Name	Birth Date	Sent	Received	Billed	Estimated	Paid	Cr Adj	Chg Adj	Net Amt	Prov	Secondary
Hurley, Rylan	12/08/1971	05/16/2022	06/02/2022	190.00	190.00	-190.00			0.00	DDS3	none
Hurst, Adalee	03/08/1942	05/25/2022	07/18/2022	131.00	131.00	-131.00			0.00	DDS2	none
Bonilla, Romina	10/02/1974	05/26/2022	06/02/2022	190.00	190.00	-190.00			0.00	DDS1	none
Irving, Marilyn	01/05/1934	05/26/2022	06/02/2022	131.00	131.00	-131.00			0.00	DDS3	none
Bonilla, Romina	10/02/1974	06/02/2022	07/18/2022	3,437.00	1,310.00	-1,852.00	0.00		1,585.00	DDS1	none
Sanz, Jada	06/10/1981	06/02/2022	07/18/2022	131.00	131.00	-131.00			0.00	DDS3	none
Curran, Audra	12/04/1962	06/03/2022	07/18/2022	190.00	190.00	-190.00			0.00	DDS1	none
Moran, Celeste	08/06/1981	08/03/2022		1,260.00	968.00				1,260.00	DDS2	none
Dobson, Latesha	08/06/1979	08/10/2022		1,655.00	985.50				1,655.00	DDS1	none
Green, Jaxon	04/01/1974	08/18/2022		131.00	131.00				131.00	DDS1	none
<b>TOTALS</b>	<b># Sent</b>	<b># Rec'd</b>	<b># Pmts</b>	<b># Cr Adj</b>	<b># Chg Adj</b>	<b>Billed</b>	<b>Estimated</b>	<b>Paid</b>	<b>Cr Adj</b>	<b>Chg Adj</b>	<b>Net Amt</b>
	25	7	7	0	0	10,039.00	6,570.50	-2,815.00	0.00	0.00	7,224.00

GRAND TOTALS

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### INSURANCE TRANSACTION ANALYSIS

1	1	1	0	0	131.00	81.00	-81.00	0.00	0.00	50.00	
<b>Boon Dental Insurance Plans</b>			Group Name <b>Tier 1</b>								
			Group # <b>84767</b>								
Patient Name	Birth Date	Sent	Received	Billed	Estimated	Paid	Cr Adj	Chg Adj	Net Amt	Prov	Secondary
Hurley, Rylan	12/08/1971	05/16/2022	06/02/2022	190.00	190.00	-190.00			0.00	DDS3	none
Hurst, Adalee	03/08/1942	05/25/2022	07/18/2022	131.00	131.00	-131.00			0.00	DDS2	none
Bonilla, Romina	10/02/1974	05/26/2022	06/02/2022	190.00	190.00	-190.00			0.00	DDS1	none
Irving, Marilyn	01/05/1934	05/26/2022	06/02/2022	131.00	131.00	-131.00			0.00	DDS3	none
Bonilla, Romina	10/02/1974	06/02/2022	07/18/2022	3,437.00	1,310.00	-1,852.00	0.00		1,585.00	DDS1	none
Sanz, Jada	06/10/1981	06/02/2022	07/18/2022	131.00	131.00	-131.00			0.00	DDS3	none
Curran, Audra	12/04/1962	06/03/2022	07/18/2022	190.00	190.00	-190.00			0.00	DDS1	none
Moran, Celeste	08/06/1981	08/03/2022		1,260.00	968.00				1,260.00	DDS2	none
Dobson, Latesha	08/06/1979	08/10/2022		1,655.00	985.50				1,655.00	DDS1	none
Green, Jaxon	04/01/1974	08/18/2022		131.00	131.00				131.00	DDS1	none
<b>TOTALS</b>	<b># Sent</b>	<b># Rec'd</b>	<b># Pmts</b>	<b># Cr Adj</b>	<b># Chg Adj</b>	<b>Billed</b>	<b>Estimated</b>	<b>Paid</b>	<b>Cr Adj</b>	<b>Chg Adj</b>	<b>Net Amt</b>
	25	7	7	0	0	10,039.00	6,570.50	-2,815.00	0.00	0.00	7,224.00

GRAND TOTALS

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## INSURANCE TRANSACTION ANALYSIS

Patient Name	Birth Date	Sent	Received	Billed	Estimated	Paid	Cr Adj	Chg Adj	Net Amt	Prov	Secondary
Hurley, Rylan	12/08/1971	05/16/2022	06/02/2022	190.00	190.00	-190.00			0.00	DDS3	none
Hurst, Adalee	03/08/1942	05/25/2022	07/18/2022	131.00	131.00	-131.00			0.00	DDS2	none
Bonilla, Romina	10/02/1974	05/26/2022	06/02/2022	190.00	190.00	-190.00			0.00	DDS1	none
Irving, Marilyn	01/05/1934	05/26/2022	06/02/2022	131.00	131.00	-131.00			0.00	DDS3	none
Bonilla, Romina	10/02/1974	06/02/2022	07/18/2022	3,437.00	1,310.00	-1,852.00	0.00		1,585.00	DDS1	none
Sanz, Jada	06/10/1981	06/02/2022	07/18/2022	131.00	131.00	-131.00			0.00	DDS3	none
Curran, Audra	12/04/1962	06/03/2022	07/18/2022	190.00	190.00	-190.00			0.00	DDS1	none
Moran, Celeste	08/06/1981	08/03/2022		1,260.00	968.00				1,260.00	DDS2	none
Dobson, Latesha	08/06/1979	08/10/2022		1,655.00	985.50				1,655.00	DDS1	none
Green, Jaxon	04/01/1974	08/18/2022		131.00	131.00				131.00	DDS1	none
<b>TOTALS</b>	<b># Sent</b>	<b># Rec'd</b>	<b># Pmts</b>	<b># Cr Adj</b>	<b># Chg Adj</b>	<b>Billed</b>	<b>Estimated</b>	<b>Paid</b>	<b>Cr Adj</b>	<b>Chg Adj</b>	<b>Net Amt</b>
	25	7	7	0	0	10,039.00	6,570.50	-2,815.00	0.00	0.00	7,224.00

**GRAND TOTALS**

# Sent	# Rec'd	# Pmts	# Cr Adj	# Chg Adj	Billed	Estimated	Paid	Cr Adj	Chg Adj	Net Amt
231	123	123	50	0	92,959.00	64,836.70	-32,925.70	-1,793.00	0.00	58,240.30

Max Amt is the billed amount with payments and the difference of charges and payments paid.

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**SUMMARY REPORTS: WHAT TO DO WITH THEM?**

DENTRIX

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**FAMILY LEDGER REPORT**

Allows you to:

**DENTRIX**

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FAMILY LEDGER REPORT				
Dental Practice				
Date: 1/11/2022		Guar Name: Maryann J Cortez		Chart Numt
		Stanten Island, NY 10302		Billing Ty
DATE	TEETH	DESCRIPTION	PATIENT	CHARGE
12/31/2020		Balance Forward		
* 07/12/2019		Topical Applic Fluoride Varnish	Maryann	0.00
* 07/12/2019		Prophylaxis-adult	Maryann	37.74
* 07/12/2019		Intraoral Full Mouth Images	Maryann	54.06
* 07/12/2019		Comprehensive oral evaluation	Maryann	25.50
* 07/12/2019	2	Amalgam-1 surf. prim/perm	Maryann	44.88
* 07/12/2019	4	Amalgam-1 surf. prim/perm	Maryann	44.88
* 07/12/2019	5	Amalgam-1 surf. prim/perm	Maryann	44.88
* 07/12/2019	13	Amalgam-1 surf. prim/perm	Maryann	44.88
* 07/12/2019	15	Amalgam-1 surf. prim/perm	Maryann	44.88
* 07/12/2019	19	Amalgam-2 surf. prim/perm	Maryann	59.16
* 07/12/2019	20	Amalgam-2 surf. prim/perm	Maryann	59.16
* 07/12/2019	21	Amalgam-1 surf. prim/perm	Maryann	44.88
* 07/12/2019	31	Amalgam-1 surf. prim/perm	Maryann	44.88
* 02/02/2021		Prophylaxis-adult	Maryann	37.74
* 02/02/2021		Biteewing Four Image	Maryann	24.48
* 02/02/2021		Periodic oral evaluation	Maryann	12.24
11/11/2021		Local anesthesia	Armando	21.42
11/11/2021	21	Surg place implant: endosteal	Armando	915.96
11/11/2021	21	Abutment supported porc/cer crn	Armando	290.70
11/11/2021	21	Implant supp porc/cer crown	Armando	504.90

**TOTAL FAMILY BALANCE AS OF 11/11/2021:**

YTD Finance Charges: 0.00

YTD Late Charges: 0.00

YTD Family Payments: 0.00

YTD Insurance Payments: 0.00

\* Procedures that have been placed in History.

**FAMILY LEDGER REPORT**

Allows you to:

- See account history of
  - Procedures, payments, adjustments, and service charges

**DENTRIX**

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FAMILY LEDGER REPORT				
Dental Practice				
Date: 1/11/2022		Guar Name: Maryann J Cortez		Chart Number: CO0017
		Stanten Island, NY 10302		Billing Type: 1
DATE	TEETH	DESCRIPTION	PATIENT	CHARGE
		Balance Forward		-79.04
		Topical Applic Fluoride Varnish	Maryann	0.00
		Prophylaxis-adult	Maryann	37.74
		Intraoral Full Mouth Images	Maryann	54.06
		Comprehensive oral evaluation	Maryann	25.50
		Amalgam-1 surf. prim/perm	Maryann	44.88
		Amalgam-1 surf. prim/perm	Maryann	44.88
		Amalgam-1 surf. prim/perm	Maryann	44.88
		Amalgam-1 surf. prim/perm	Maryann	44.88
		Amalgam-1 surf. prim/perm	Maryann	44.88
		Amalgam-2 surf. prim/perm	Maryann	59.16
		Amalgam-2 surf. prim/perm	Maryann	59.16
		Amalgam-1 surf. prim/perm	Maryann	44.88
		Amalgam-1 surf. prim/perm	Maryann	44.88
		Prophylaxis-adult	Maryann	37.74
		Biteewing Four Image	Maryann	24.48
		Periodic oral evaluation	Maryann	12.24
		Local anesthesia	Armando	21.42
		Surg place implant: endosteal	Armando	915.96
		Abutment supported porc/cer crn	Armando	290.70
		Implant supp porc/cer crown	Armando	504.90

**TOTAL FAMILY BALANCE AS OF 11/11/2021:** 2278.18

YTD Finance Charges: 0.00

YTD Late Charges: 0.00

YTD Family Payments: 0.00

YTD Insurance Payments: 0.00

n placed in History.

**FAMILY LEDGER REPORT**

Allows you to:

- See account history of
  - Procedures, payments, adjustments, and service charges
- Great for patients who ask for their yearly activity

DENTRIX

FAMILY LEDGER REPORT				
Dental Practice				
			Page: 1	
J Cortez		Chart Number:CO0017		
land, NY 10302		Billing Type: 1		
DESCRIPTION	PATIENT	CHARGE	PAYMENT	BALANCE
Forward			-79.04	-79.04
Topical Fluoride Varnish	Maryann	0.00		-79.04
Orthodontic adult	Maryann	37.74		-41.30
Full Mouth Images	Maryann	54.06		12.76
Comprehensive oral evaluation	Maryann	25.50		38.26
-1 surf. prim/per	Maryann	44.88		83.14
-1 surf. prim/per	Maryann	44.88		128.02
-1 surf. prim/per	Maryann	44.88		172.90
-1 surf. prim/per	Maryann	44.88		217.78
-1 surf. prim/per	Maryann	44.88		262.66
-2 surf. prim/per	Maryann	59.16		321.82
-2 surf. prim/per	Maryann	59.16		380.98
-1 surf. prim/per	Maryann	44.88		425.86
-1 surf. prim/per	Maryann	44.88		470.74
Orthodontic adult	Maryann	37.74		508.48
Four Image	Maryann	24.48		532.96
Comprehensive oral evaluation	Maryann	12.24		545.20
Local anesthesia	Armando	21.42		566.62
Endosteal implant	Armando	915.96		1482.58
Partial supported porcelain crown	Armando	290.70		1773.28
Supp porcelain crown	Armando	504.90		2278.18
<b>TOTAL FAMILY BALANCE AS OF 11/11/2021:</b>				<b>2278.18</b>
YTD Finance Charges:				0.00
YTD Late Charges:				0.00
YTD Family Payments:				0.00
YTD Insurance Payments:				0.00

**FAMILY LEDGER REPORT**

Allows you to:

- See account history of
  - Procedures, payments, adjustments, and service charges
- Great for patients who ask for their yearly activity

Located in: [Print > Family Ledger](#)

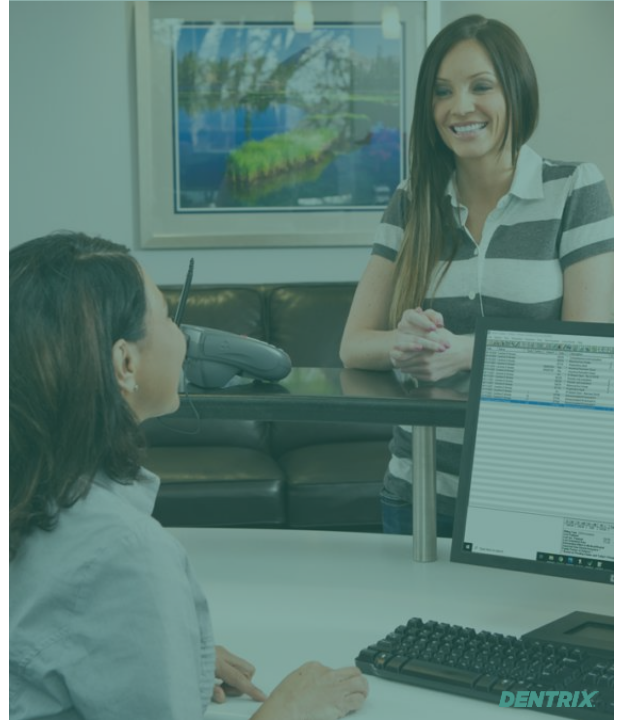
DENTRIX

FAMILY LEDGER REPORT				
Dental Practice				
			Page: 1	
J Cortez		Chart Number:CO0017		
land, NY 10302		Billing Type: 1		
DESCRIPTION	PATIENT	CHARGE	PAYMENT	BALANCE
Forward			-79.04	-79.04
Topical Fluoride Varnish	Maryann	0.00		-79.04
Orthodontic adult	Maryann	37.74		-41.30
Full Mouth Images	Maryann	54.06		12.76
Comprehensive oral evaluation	Maryann	25.50		38.26
-1 surf. prim/per	Maryann	44.88		83.14
-1 surf. prim/per	Maryann	44.88		128.02
-1 surf. prim/per	Maryann	44.88		172.90
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Partial supported porcelain crown	Armando	290.70		1773.28
Supp porcelain crown	Armando	504.90		2278.18
<b>TOTAL FAMILY BALANCE AS OF 11/11/2021:</b>				<b>2278.18</b>
YTD Finance Charges:				0.00
YTD Late Charges:				0.00
YTD Family Payments:				0.00
YTD Insurance Payments:				0.00

## ONLINE HELP LINKS



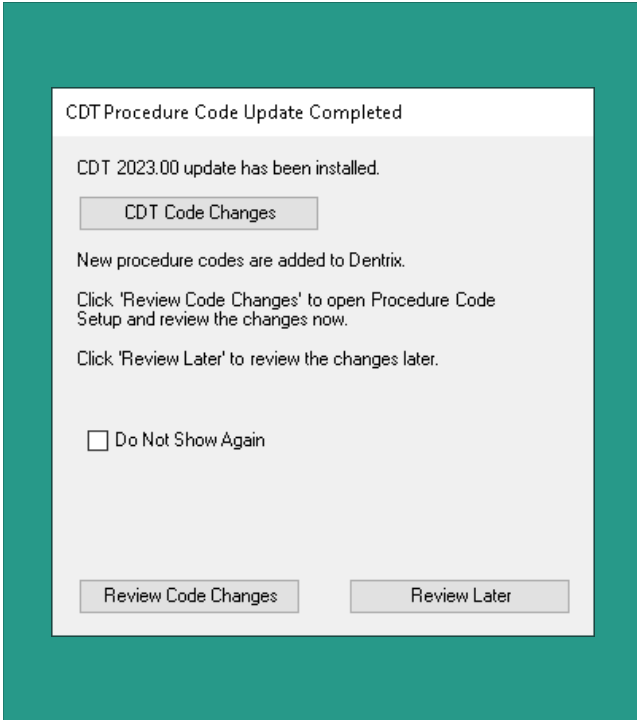
**Blog:** [Adding ADA Codes to Ledger Printouts](#)



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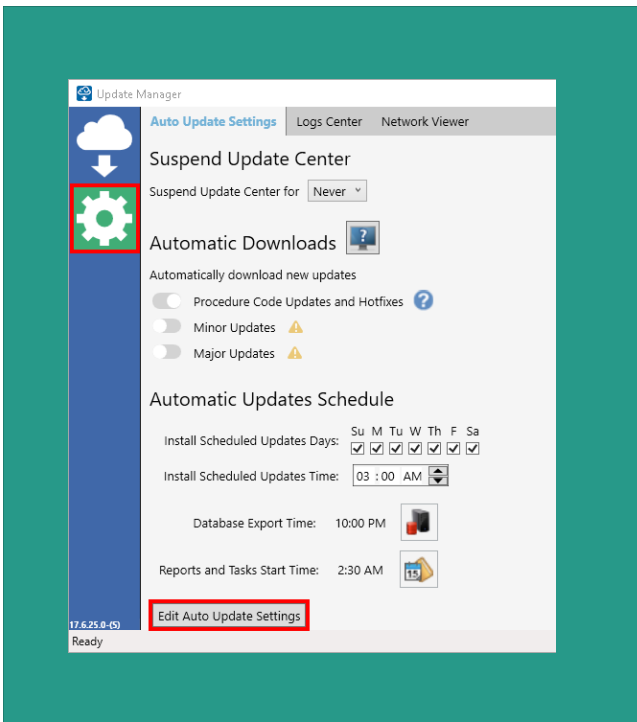
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## CDT UPDATE

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## CDT UPDATE

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## ONLINE HELP LINKS



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Referrals, Year End

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vector dental consulting@gmail.com'. The Dentrix logo is in the bottom left corner. On the right, a professional headshot of Charlotte Skaggs is shown. She has long brown hair, is smiling, and is wearing a black blazer and a pearl necklace."/>

**WANT TO CONTACT CHARLOTTE?**

Charlotte Skaggs, Vector Dental Consulting LLC

Email: [vector dental consulting@gmail.com](mailto:vector dental consulting@gmail.com)

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