

DENTRIX ENTERPRISE 11.0

REPORTS REFERENCE

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Contents

Introduction.....	1
Adjustment Summary Report	4
Aging/Credit Balance Report	6
Analysis Summary Report - Daily.....	8
Analysis Summary Report - Standard.....	12
Appointment Book View Printout	14
Appointment Cycle Time Report	16
Appointment Reminder Cards	18
Appointment Statistics Report	20
As Soon As Possible List	22
Assigned Rights Report	24
Audit Report - Appointments.....	26
Audit Report - Audit Log Status.....	28
Audit Report - Clinics	30
Audit Report - Combined	32
Audit Report - Patients.....	34
Audit Report - Providers/Staff	36
Audit Report - Transactions	38
Audit Rights Report - Assigned Individually.....	40
Audit Rights Report - Assigned to Groups.....	42
Audit Rights Report - Group Names.....	44
Audit Rights Report - Users to Groups	46
Billing Statement	48
Birthday List.....	50
Caries Prevalence and Periodontal Index Report.....	52
Clinical Notes Report	64
Clinical Quality Measures List.....	66
Collections Manager List	70
Continuing Care Cards - No Appointment	74
Continuing Care Cards - with Appointment	75
Continuing Care Display List	76
Coupon Book - Future Due Payments.....	78
Coupon Book - Payment Agreements.....	79
Credit Card Transaction Report.....	80
Custom Practice Information Report	82
Daily Appointment List (DX1)	84
Daily Appointment List Report.....	86
Daily Summary Report.....	88
Day Sheet (Adjustments) Report.....	90
Day Sheet (Charges and Receipts) Report	94
Day Sheet (Receipts) Report.....	98
Day Sheet Report	100
Dental Diagnostic Code List.....	104
Dental Encounters Report	106
Deposit Slip.....	108
Document Center Document.....	112
Document Center List.....	114
Employers and Employed Patients Report	116

Family Ledger Report.....	118
Family Ledger Report (Single Family).....	120
Fee Schedules Report.....	122
Finance Charge Report.....	124
Future Due Payment Plan Report - Monthly Totals.....	126
Future Due Payment Plan Report - Standard.....	128
Initial Health History Report.....	130
Insurance Carrier List.....	132
Insurance Carrier Production - Full Report.....	136
Insurance Carrier Production - Summary Report.....	138
Insurance Claim Aging Report.....	140
Insurance Claims Not Sent Report.....	142
Insurance Coverage Tables Report.....	144
Insurance Eligibility Report.....	146
Insurance Transaction Analysis Report.....	148
Late Charge Report.....	150
Letter Merge Reports.....	152
Meaningful Use Measure Calculation List.....	156
Medical Code List.....	180
Multi-Code List.....	182
New Patient List.....	184
Office Journal Report.....	186
Operator Day Sheet Report.....	188
Operatory Appointment List Report.....	190
Oral Health Education Report.....	192
Patient Chart and Progress Notes Printout.....	194
Patient Chart Printout.....	196
Patient Health Assessment Report.....	198
Patient Information Accessed Report.....	200
Patient Ledger Report.....	202
Patient List.....	204
Patient List (Filtered).....	206
Patient Notes Report.....	208
Patient Proposed Treatment Case Report (Your Care Plan).....	212
Patient Questionnaire.....	214
Patient Route Slip.....	216
Patient Treatment Case Report.....	218
Patient's Ledger Report.....	220
Payment Agreement Amortization Schedule.....	222
Payment Agreement Report.....	224
Payment Summary Report.....	226
Perio - Combined Graphic & Data Chart Report.....	228
Perio - Data Chart Report.....	230
Perio - Exam Comparison Report.....	232
Perio - Graphic Chart Report.....	234
Perio - Pocket Depths Only Report.....	236
Perio Exam List.....	238
Periodontal Exam Report.....	240
Practice Analysis Report.....	242
Practice Organization List.....	244
Practice Statistics Report.....	246

Practice Treatment Case Report.....	248
Prescription Printout.....	250
Pre-Treatment Estimate Aging Report.....	252
Pre-Treatment Estimates Not Sent Report.....	254
Procedure Code List.....	256
Procedures Not Attached to Insurance Report.....	258
Production Summary Report.....	260
Provider A/R Totals - Daily Report.....	264
Provider A/R Totals - Standard Report.....	266
Provider IDs List.....	272
Provider Revenue - Allocations Report.....	274
Provider Revenue - Charges Report.....	276
Provider Revenue - Credits Report.....	278
Provider Revenue - Summary Report.....	280
Referral Analysis Report.....	282
Referral Recap Report.....	284
Referral Slip.....	286
Referred By Doctor/Other Report.....	288
Referred By Patient Report.....	290
Referred To Doctor Report.....	292
Registration Information Report.....	294
RVU Day Sheet Report.....	296
RVU Production Summary Report.....	298
RVU Schedules Report.....	302
RVU Utilization Report.....	304
Secondary Insurance Claims Not Created Report.....	306
Secondary Pre-Treatment Estimates Not Created Report.....	308
Standard Coverage Tables Report.....	310
Suspended Credits Report.....	312
Treatment Case Report.....	314
Treatment Plan Approval Report.....	316
Treatment Plan Approval Status Report.....	318
Truth in Lending Disclosure Statement.....	320
UDS - Age/Gender Report.....	322
UDS - Encounters and Users by Selected Procedure Codes Report.....	326
UDS - Encounters by Provider Report.....	328
UDS - Insurance Financial Class Report.....	330
UDS - Insurance Financial Class Report (2013).....	332
UDS - Medicaid/Medicare Report.....	334
UDS - Patient Related Revenue Report.....	336
UDS - Patient Status Report.....	338
UDS - Sealant Statistics Report.....	340
UDS - Tobacco Use and Intervention Report.....	342
Unscheduled Appointment List (DX1).....	344
Unscheduled Appointment List (OM).....	346
Unscheduled Treatment Plans (Condensed) Report.....	348
Unscheduled Treatment Plans (Detailed) Report.....	350
Updated Dental Insurance Payment Table Report.....	352
Utilization Report.....	354
Walkout - Doctor's Statement.....	356
Walkout - Family Walkout.....	358

Index by Symbol	364
Index by When to Run a Report	366
Index by Module.....	368
Index of Filters by Report.....	370
Index by Filter	380
Index by Report Item.....	391

Introduction

The Dentrax Enterprise Reports Reference is designed to help your office get the most out of Dentrax Enterprise reporting. Detailed explanations, along with sample screenshots, are provided to help your office learn why and when to use each report and how to read each report.

For additional help with Dentrax Enterprise reports, consult the *Dentrax Enterprise User's Guide*, refer to the Dentrax Enterprise Help (in any module, from the **Help** menu, click **Contents**), or contact Technical Support at 1-800-459-8067.

How to Use this Book

Reports are listed alphabetically in this book. If you do not know the name of a report, do not know which report contains the data you are looking for, or want to know the filters of each report, use the Table of Contents or one of the following indexes located at the end of the manual:

- **Index by Report Name** – Lists all the reports alphabetically.
- **Index by Symbol** – Categorizes reports by Quick Reference symbol.
- **Index by When to Run a Report** – Groups reports by when it is recommended to run each report.
- **Index by Module** – Groups reports by the Dentrax Enterprise modules from which you run each report.
- **Index of Filters by Report** – For each report, the available filters are listed.
- **Index by Filter** – For each available filter, the reports that use that particular filter are listed.
- **Index by Report Item** – Groups reports by the items found on each report. The report items are arranged in categories to help you find the report items you are looking for.






How to Read this Book

After each report is introduced, a Quick Reference section summarizes why and when to run the report. In the Quick Reference section, you'll find Quick Reference symbols that represent how your office can benefit from using the report.

Quick Reference Symbols

Quick Reference Symbols represent how your office will benefit from a report. Use the Quick Reference symbols and the “Index by Symbol” section (at the end of this manual) to help your office focus on specific aspects of the practice.

You will find the following Quick Reference symbols in this book:

Symbol	Category	Explanation
	Patient Care	Helps your practice provide patient care services.
	Information	Gathers Dentrix Enterprise information together so that you can review it without opening multiple dialog boxes.
	Financial	Helps you track , monitor, or project financial data.
	Production	Helps you track, monitor, or project production.
	Time	Saves you time.

Tips for Understanding Dentrix Enterprise Reports

Procedure Date vs. Entry Date

Many Dentrix Enterprise reports can be run by Procedure Date or Entry Date. Because the type of date by which you run a report can filter out desired data, it is essential that you understand the difference between these two options.

- **Entry Date** – The actual date a procedure is entered.
- **Procedure Date** – The date a procedure is completed. Because the clinical chart must always be accurate, this date can be back-dated.

Scenario: You have to enter last Friday’s procedures on Monday. The *Entry Date* would be Monday. The *Procedure Date* would be Friday.

Consequence: If you run a report, such as the Day Sheet, by *Entry Date* for Monday, the procedures would be included in the report. However, if you run the same report by *Procedure Date*, the procedures would not be included.

Additionally, if Friday was a previous month, the MTD totals would be affected by the option used to run the report.

Year-to-date vs. Month-to-date

Many Dentrix Enterprise reports include Year-to-date and Month-to-date totals. It is important to understand how each total is calculated.

- **Year-to-date** – The total amount since the start of the current year (January 1).
- **Month-to-date** – The total amount since the start of the current month.

Note: *Month-to-date and Year-to-date values can be affected by whether a report is run by Entry Date or Procedure Date.*

Dentrix Enterprise Reports

Adjustment Summary Report

The Adjustment Summary Report displays adjustment totals by adjustment type.

\$	<p>Why: To assist in preparing tax documents (to view charity care and other tax deductible totals), and to view the amount of bad debt written off</p> <p>When: Yearly and quarterly</p>
-----------	---

Adjustment Summary				
01/01/2018 - 04/05/2018 Procedure Date Clinics: <ALL> Providers: <ALL> Billing Type: <ALL> Adjustment Types: <ALL>				
Report Date: 04/05/2018	Report Generated By: enterprise	Page 1 of 1		
Description	Quantity	Total	Average	Percent
+Debit Adjustment	2	100.00	50.00	100.00%
-Credit Adjustment	2	-75.00	-37.50	51.72%
-Professional Discount	4	-70.00	-17.50	48.28%
Finance Charge	3	332.00	110.67	100.00%
Late Charge	4	7,951.00	1,987.75	100.00%
Grand Totals	(A)	(B)	(C)	(D)
Total Credit Adjustments	6	-145.00	-24.17	
Total Debit Adjustments	2	100.00	50.00	(E)
Total Finance Charges	3	332.00	110.67	
Total Late Charges	4	7,951.00	1,987.75	
Totals	15	8,238.00	549.20	

How do I run the Adjustment Summary Report?

From the DXOne Reporting module, select **Analysis**, and then double-click **Adjustment Summary**. For additional details about running this report, see the "Adjustment Summary Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Quantity** – The number of adjustments posted.
- B. Total** – The total dollar amount of adjustments.
- C. Average** – The average dollar amount of adjustments (Total / Quantity).
- D. Percent** – The adjustment total divided by the combined total of all adjustments in the same category.

Note: There are four adjustment categories: credit adjustments, debit adjustments, finance charges, and late charges.

- E. Grand Totals** – The Grand Totals section includes the quantity, total, and average for all the credit adjustments, debit adjustments, finance charges, late charges, and totals (of all adjustments) on the report.

Aging/Credit Balance Report

The Aging/Credit Balance Report lists guarantors with outstanding balances or credit balances, along with their contact information.

\$

Why: To identify guarantors with outstanding balances so that they can be targeted for collections, or to view and/or contact guarantors with a credit balance

When: Monthly

AGING REPORT

Balance as of: 04/23/2018 Procedure Date
 Last Payment Before: <ALL>
 Balance Range: <ALL>
 Guarantor Range: Abbott, James - Farrer, Lisa
 Days Past Due: 0 - <No Limit>
 Clinics: <ALL>
 Provider: <ALL>
 Billing Types: <ALL>

Report Date: 04/23/2018
Report Generated By: enterprise
Page 1 of 1

Guarantor Name	Phone	BT	Last Pmt Date	Last Pmt Amt	Last Stmt Date	0-30	31-60	61-90	91-120	121-150	151-180	Over 180	Sus Cred	Ins Est.	Guar Portion	Balance
Abbott, James	(404)555-5445	1				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Brown, Mary	(404)555-1586	2	04/22/2018	125.00	04/03/2018	0.00	230.00	4,516.00	1,302.64	0.00	118.40	0.00	1,772.00	4,792.04	6,564.04	6,564.04
- Tue - Jan 20,2018 -account note here																
Crosby, Brent R	(919) 555-1432	1				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Cross, Jill T	(919) 555-3784	1	02/21/2018	116.00		0.00	0.00	0.00	0.00	0.00	0.00	0.00	-104.00	0.00	0.00	-104.00
Davis, Harmon J	(919) 555-3781	1	11/29/2017	83.70		0.00	0.00	0.00	0.00	0.00	360.70	0.00	0.00	360.70	360.70	360.70
Edwards, John	(919) 555-3778	1	02/21/2018	24.00		0.00	0.00	0.00	0.00	0.00	208.00	0.00	0.00	208.00	208.00	208.00
Edwards, Kelly	(919) 555-3775	1				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Farrer, Lisa	(212) 555-3333	1	11/24/2017			0.00	0.00	0.00	0.00	0.00	92.00	0.00	0.00	92.00	92.00	92.00

	0-30	31-60	61-90	91-120	121-150	151-180	Over 180	Sus Cred	Ins Est.	Guar Portion	Balance
TOTALS	397.00	0.00	230.00	4,516.00	1,302.64	0.00	779.10	-104.00	1,772.00	5,452.74	7,120.74
PERCENT	5.58%	0.00%	3.23%	63.42%	18.29%	0.00%	10.94%	-1.46%	24.89%	76.58%	

D	AMCCLURE					0.00	0.00	0.00	100.00	0.00	0.00	0.00			100.00	
	Abbott, Patricia	(919)555-1586	2	04/22/2018	125.00	04/03/2018	0.00	0.00	0.00	100.00	0.00	0.00	0.00	1,772.00	4,792.04	100.00
	DDS1					326.00	0.00	230.00	22.00	0.00	0.00	252.00			830.00	
	Brown, Mary	(919)555-1586	2	04/22/2018	125.00	04/03/2018	326.00	0.00	230.00	22.00	0.00	0.00	1,772.00	4,792.04	578.00	
	Crosby, Brent G	(919)555-3778	1	02/21/2018	24.00		0.00	0.00	0.00	0.00	0.00	208.00	0.00	208.00	208.00	
	Davis, Harmon Q	(212)555-3333	1	11/24/2017	0.00		0.00	0.00	0.00	0.00	0.00	44.00	0.00	92.00	44.00	

E	CENTRAL					397.00	0.00	230.00	4,516.00	1,302.64	0.00	38.40	0.00			6,484.04
	Abbott, Patricia	(555-1586	2	04/22/2018	125.00	04/03/2018	397.00	0.00	230.00	4,516.00	1,302.64	0.00	38.40	0.00	1,772.00	4,792.04

How do I run the Aging/Credit Balance Report?

From the DXOne Reporting module, select **Ledger**, and then double-click **Aging/Credit Balance**. For additional details about running this report, see the "Aging/Credit Balance Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).



What important information does this report provide?

The report can be grouped and subtotaled by provider. Or, the report can be grouped and subtotaled by clinic. The following information appears on the report:

- A. Guarantor Details** – The name, phone number, billing type, last payment, and last statement of each guarantor.
- B. Balances** – The guarantor's aged balances.
- C. Totals** – The combined totals of aged balances listed on the report. Use aged balance totals to quickly ensure the practice is current on collection efforts.
- D. By Provider** – The guarantors and corresponding balances are shown for the provider, along with a subtotal for the provider.
- E. By Clinic** – The guarantors and corresponding balances are shown for the clinic, along with a subtotal for the clinic.

Analysis Summary Report - Daily

The Analysis Summary - Daily Report lists transaction totals. This report includes much of the same information as the Day Sheet Report, but formats it in a way that helps you compare provider and/or clinic totals for each day in a given date range.

Why: To review production totals and compare provider and/or clinic totals

When: Monthly

Analysis Summary - Daily												
04/22/2018 - 04/29/2018 Entry Date												
Clinics: <ALL>												
Providers: <ALL>												
Billing Type: <ALL>												
Report Date: 04/29/2018			Report Generated By: enterprise						Page 1 of 1			
Beginning Balance	Charges Billed to Ins	Charge Adj	Finance Charges Late Charges	Debit Initial Balances Debit Special Adj	Applied Payments Suspended Payments OTH Applied Payments	Applied Ins Payments Suspended Ins Payments OTH Applied Ins Payments	Applied Credit Adj Suspended Credit Adj OTH Applied Credit Adj	Credit Special Adj Initial Balances OTH Credit Special Adj	Pats Seen New Pats	Avg Prod Per Pat Avg Chrg Per Proc	Ending Balance	Net Change
04/22/2018												
0.00	386.00	10.00	0.00	0.00	-148.00	0.00	-20.00	0.00	2	193.00	249.00	249.00
	0.00		21.00	0.00	0.00	0.00	0.00	0.00	0	64.33		
					0.00	0.00	0.00	0.00		0.00		
04/23/2018												
249.00	3,376.56	0.00	332.00	0.00	-20.00	0.00	0.00	0.00	10	337.66	11,867.56	11,618.56
	0.00		7,930.00	0.00	0.00	0.00	0.00	0.00	3	281.38		
					0.00	0.00	0.00	0.00		0.00		
04/24/2018												
11,867.56	105.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1	105.00	11,972.56	105.00
	105.00		0.00	0.00	0.00	0.00	0.00	0.00	1	35.00		
					0.00	0.00	0.00	0.00		0.00		
04/27/2018												
11,972.56	973.00	0.00	0.00	0.00	-100.00	-698.40	0.00	0.00	3	324.33	12,122.16	149.60
	898.00		0.00	0.00	0.00	0.00	-25.00	0.00	0	243.25		
					0.00	0.00	0.00	0.00		0.00		
GRAND TOTALS												
17,940.04	4,840.56	10.00	332.00	0.00	-268.00	-698.40	-20.00	0.00	16	302.54	30,062.20	12,122.16
	1,003.00		7,951.00	0.00	0.00	0.00	-25.00	0.00	4	193.62		
					0.00	0.00	0.00	0.00		0.00		

Analysis Summary - Daily

04/23/2018 - 04/29/2018 Entry Date
Clinics: CENTRAL
Providers: DDS1
Billing Type: <ALL>

Report Date: 04/29/2018 Report Generated By: enterprise Page 1 of 1

Beginning Balance	Charges Billed to Ins	Charge Adj	Finance Charges Late Charges	Debit Initial Balances Debit Special Adj	Applied Payments	Applied Ins Payments Credit Special Adj	Applied Credit Adj Credit Initial Balances	Pats Seen New Pats	Avg Prod Per Pat Avg Chrg Per Proc	Ending Balance	Net Change
Provider: DDS1											
Clinic: CENTRAL											
04/23/2018											
1,389.00	2,586.56	0.00	332.00	0.00	0.00	0.00	0.00	5	517.31	12,237.56	10,848.56
	0.00		7,930.00	0.00		0.00	0.00	1	431.09		
04/27/2018											
12,237.56	898.00	0.00	0.00	0.00	-82.00	-698.40	0.00	2	449.00	13,053.56	816.00
	898.00		0.00	0.00		0.00	0.00	0	299.33		
Clinic: CENTRAL											
1,389.00	3,484.56	0.00	332.00	0.00	-82.00	-698.40	0.00	7	497.79	12,355.16	10,966.16
	898.00		7,930.00	0.00		0.00	0.00	1	387.17		
Provider: DDS1											
1,389.00	3,484.56	0.00	332.00	0.00	-82.00	-698.40	0.00	7	497.79	12,355.16	10,966.16
	898.00		7,930.00	0.00		0.00	0.00	1	387.17		
GRAND TOTALS											
1,389.00	3,484.56	0.00	332.00	0.00	-82.00	-698.40	0.00	7	497.79	12,355.16	10,966.16
	898.00		7,930.00	0.00		0.00	0.00	1	387.17		

A

C

B

Analysis Summary - Daily

04/23/2018 - 04/29/2018 Entry Date
Clinics: CENTRAL
Providers: DDS1
Billing Type: <ALL>

Report Date: 04/29/2018 Report Generated By: enterprise Page 1 of 1

Beginning Balance	Charges Billed to Ins	Charge Adj	Finance Charges Late Charges	Debit Initial Balances Debit Special Adj	Applied Payments	Applied Ins Payments Credit Special Adj	Applied Credit Adj Credit Initial Balances	Pats Seen New Pats	Avg Prod Per Pat Avg Chrg Per Proc	Ending Balance	Net Change
Clinic: CENTRAL											
Prov: DDS1											
04/23/2018											
1,389.00	2,586.56	0.00	332.00	0.00	0.00	0.00	0.00	5	517.31	12,237.56	10,848.56
	0.00		7,930.00	0.00		0.00	0.00	1	431.09		
04/27/2018											
12,237.56	898.00	0.00	0.00	0.00	-82.00	-698.40	0.00	2	449.00	13,053.56	816.00
	898.00		0.00	0.00		0.00	0.00	0	299.33		
Prov: DDS1											
1,389.00	3,484.56	0.00	332.00	0.00	-82.00	-698.40	0.00	7	497.79	12,355.16	10,966.16
	898.00		7,930.00	0.00		0.00	0.00	1	387.17		
Clinic: CENTRAL											
1,389.00	3,484.56	0.00	332.00	0.00	-82.00	-698.40	0.00	7	497.79	12,355.16	10,966.16
	898.00		7,930.00	0.00		0.00	0.00	1	387.17		
GRAND TOTALS											
1,389.00	3,484.56	0.00	332.00	0.00	-82.00	-698.40	0.00	7	497.79	12,355.16	10,966.16
	898.00		7,930.00	0.00		0.00	0.00	1	387.17		

A

D

B

How do I run the Analysis Summary Report - Daily?

From the DXOne Reporting module, select **Management**, and then double-click **Analysis Summary**. For additional details about running this report, see the "Analysis Summary Report" topic in the DXOne Reporting portion of the Dentrax Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report can be grouped by clinic and then by provider, or you can have the report grouped by provider and then by clinic.

A. Daily Summary – The transaction totals for each day in the date range.

B. Grand Totals – The grand total of transactions for the given date range.

C. Provider Summary



- **Clinic Subtotals** – The daily transaction totals for a provider by clinic.
- **Provider Totals** – The transaction totals for a provider.

D. Clinic Summary

- **Provider Subtotals** – The daily transaction totals for a clinic by provider.
- **Clinic Totals** – The transaction totals for a clinic.

Analysis Summary Report - Standard

The Analysis Summary - Standard report lists transaction totals. This report includes much of the same information as the Day Sheet report, but formats it in a way that helps you compare provider and and/or clinic totals.

	Why: To review production totals and compare provider and/or clinic totals
	When: Monthly

Analysis Summary - Standard											
05/01/2018 - 05/01/2018 Entry Date Clinics: CENTRAL Providers: DDS1 Billing Type: <ALL>											
Report Date: 05/01/2018			Report Generated By: enterprise						Page 1 of 1		
Beginning Balance	Charges Billed to Ins	Charge Adj	Finance Charges Late Charges	Debit Initial Balances Debit Special Adj	Applied Payments	Applied Ins Payments Credit Special Adj	Applied Credit Adj Credit Initial Balances	Pats Seen New Pats	Avg Prod Per Pat Avg Chrg Per Proc	Ending Balance	Net Change
GRAND TOTALS											
470.00	1,011.00 425.00	10.00	22.00 21.00	0.00 0.00	-30.00	-105.00 0.00	-10.00 0.00	8 2	126.38 48.14	1,389.00	919.00

A

Analysis Summary - Standard											
05/01/2018 - 05/01/2018 Entry Date Clinics: CENTRAL Providers: DDS1 Billing Type: <ALL>											
Report Date: 05/01/2018			Report Generated By: enterprise						Page 1 of 1		
Beginning Balance	Charges Billed to Ins	Charge Adj	Finance Charges Late Charges	Debit Initial Balances Debit Special Adj	Applied Payments	Applied Ins Payments Credit Special Adj	Applied Credit Adj Credit Initial Balances	Pats Seen New Pats	Avg Prod Per Pat Avg Chrg Per Proc	Ending Balance	Net Change
Provider: DDS1											
Clinic: CENTRAL											
470.00	1,011.00 425.00	10.00	22.00 21.00	0.00 0.00	-30.00	-105.00 0.00	-10.00 0.00	8 2	126.38 48.14	1,389.00	919.00
Provider: DDS1											
470.00	1,011.00 425.00	10.00	22.00 21.00	0.00 0.00	-30.00	-105.00 0.00	-10.00 0.00	8 2	126.38 48.14	1,389.00	919.00
GRAND TOTALS											
470.00	1,011.00 425.00	10.00	22.00 21.00	0.00 0.00	-30.00	-105.00 0.00	-10.00 0.00	8 2	126.38 48.14	1,389.00	919.00

B

A

Analysis Summary - Standard											
05/01/2018 - 05/01/2018 Entry Date											
Clinics: CENTRAL											
Providers: DDS1											
Billing Type: <ALL>											
Report Date: 05/01/2018				Report Generated By: enterprise				Page 1 of 1			
Beginning Balance	Charges Billed to Ins	Charge Adj	Finance Charges Late Charges	Debit Initial Balances Debit Special Adj	Applied Payments	Applied Ins Payments Credit Special Adj	Applied Credit Adj Credit Initial Balances	Pats Seen New Pats	Avg Prod Per Pat Avg Chrg Per Proc	Ending Balance	Net Change
Clinic: CENTRAL											
Prov: DDS1											
470.00	1,011.00	10.00	22.00	0.00	-30.00	-105.00	-10.00	8	126.38	1,389.00	919.00
	425.00		21.00	0.00		0.00	0.00	2	48.14		
Clinic: CENTRAL											
470.00	1,011.00	10.00	22.00	0.00	-30.00	-105.00	-10.00	8	126.38	1,389.00	919.00
	425.00		21.00	0.00		0.00	0.00	2	48.14		
GRAND TOTALS											
470.00	1,011.00	10.00	22.00	0.00	-30.00	-105.00	-10.00	8	126.38	1,389.00	919.00
	425.00		21.00	0.00		0.00	0.00	2	48.14		

How do I run the Analysis Summary Report - Standard?

From the DXOne Reporting module, select **Management**, and then double-click **Analysis Summary**. For additional details about running this report, see the "Analysis Summary Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report can be grouped by clinic and then by provider, or you can have the report grouped by provider and then by clinic.

A. Grand Totals – The grand total of transactions in the given date range.

B. Provider Summary


- **Clinic Subtotals** – The transaction totals for a provider by clinic.
- **Provider Totals** – The transaction totals for a provider.

C. Clinic Summary

- **Provider Subtotals** – The transaction totals for a clinic by provider.
- **Clinic Totals** – The transaction totals for a clinic.

Appointment Book View Printout

The Appointment Book View printout displays a graphical representation of your appointment schedule.



Why: To print daily appointments by appointment view and to have printouts of the schedule to hang up in operatories

When: Daily or as needed

Date: 06/26/2018		PMTS - DENTRIX DENTAL SYSTEMS		Page:
		Tuesday - June 26, 2018		
		OP-1	OP-2	
8:00am		Brown, Mary C-Ex, FMX, ProphyA H:(919)555-3664 DR10 0197 General	Abbott, Patricia FMX, ProphyA, ProphyA H:(801)555-1586 DR05 0207 General	
		(A)		
9:00am		Wk: Edwards, John O C-Ex, FMX, ProphyA H:(919)555-3664 DR10 0197 General	Wk: Abbott, James S C-Ex, FMX, ProphyA H:(801)555-1586 DR05 0187 General	
10:00am		Wk:(808)555-8216 Smith, Michael A C-Ex, FMX, ProphyA H:(919)555-1876 DR10 0197 General	Wk:(801)375-1487 Crosby, Brent T C-Ex, FMX, ProphyA H:(919)555-3766 DR05 0197 General	
11:00am		Wk:(808)555-4044		
12:00pm				
1:00pm		Gleason, Alice C-Ex, FMX, ProphyA H:(781)555-6250 DR10 0197 General	Gleason, Gary T C-Ex, FMX, ProphyA H:(919)555-3763 DR05 0172 General	
2:00pm		Wk:(701)555-3154 Perkins, Shelly A ExtSingTh#17 H:(343)555-7421 DR10	Wk:(808)555-8447 Winters, Carl A C-Ex, FMX, ProphyA H:(919)555-1630 DR05 0197 General	
3:00pm		Valgardson, Adrian RCT3#31 H:(743)555-3332 DR10 0800 General	Wk:(808)555-3470 Farrer, Lisa C-Ex, FMX, ProphyA H:(801)555-3864 DR05 0172 General	
4:00pm		Wk:(743)555-8700 000-00-0000	Wk:	

DR05
 DR10

B
Appointment Note:
 Order notepads for Gayle.

How do I run the Appointment Book View Printout?

1. From the Appointment Book, select the view you want to print (for example, press F1), and navigate to the day you want to print (if not the day currently being displayed).
2. From the **File** menu, click **Print Appointment Book View** to open the **Print Appointment Book View** dialog box.
3. Click **Print** or **Batch** to generate the Appointment Book View printout. The report can be printed in color (if you are using a color printer).

For additional details about running this report, see the “Appointment Book View Report” topic in the Appointment Book portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Appointments** – The appointments in each operatory of the view.
- B. Day Note** – The note for the day, which can be entered by clicking the **Note** box in the upper-left corner of the Appointment Book.

Appointment Cycle Time Report

The Appointment Cycle Time Report helps you analyze changes in appointments' statuses. The report provides statistics regarding how long patients wait to be treated and how long they spend in treatment.

	Why: To generate a report of appointment information, total visit times, and in-clinic wait times to monitor daily activity
	When: Daily

Server Name: <Default>

Appointment Cycle Time

Date Range: 12/19/2018 - 12/19/2018
 Clinics: <ALL>
 Providers: <ALL>
 Patients: <ALL> - <ALL>
 Appt Time Start Status: READY
 Appt Time End Status: CHKOUT
 In Operatory Tracking Statuses: SEATED, SEDATE, TX, WAKE

Appt Clinic	Appt Date	Appt Type	Provider	Patient Name	Chart#	ADA Code(s)	Current Status	Event Start Time	Changed Status	Event End Time	Event Total Time
AF	12/19/2018	General	DESMITH	Morales, Debbie	MO0001C	D9110	READY	3:21PM	SEATED	3:21PM	0
							SEATED	3:21PM	CHKOUT	3:25PM	4
							Total Time				4
							ICWT				0
AF	12/19/2018	General	DESMITH	Reyes, Jose	RE140	D9310	READY	3:21PM	SEATED	3:23PM	2
							SEATED	3:23PM	CHKOUT	3:27PM	4
							Total Time				6
							ICWT				2
AF	12/19/2018	General	MHAYES	Tran, Thomas	TR0031	D0330	READY	3:25PM	SEATED	3:27PM	2
							SEATED	3:27PM	CHKOUT	3:35PM	8
							Total Time				10
							ICWT				2
AF	12/19/2018	General	DESMITH	Reed, Sandy	RE0019C	D9310	READY	4:45PM	SEATED	4:46PM	1
							SEATED	4:46PM	SEDATE	4:48PM	2
							SEDATE	4:48PM	TX	4:49PM	1
							TX	4:49PM	WAKE	4:51PM	2
							WAKE	4:51PM	CHKOUT	4:52PM	1
							Total Time				7
							ICWT				1
							ICWT Average				1
							ICWT Median				1

How do I run the Appointment Cycle Time Report?

From the DXOne Reporting module, select **Management**, and then double-click **Appointment Cycle Time**. For additional details about running this report, see the “Appointment Cycle Time Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).


What important information does this report provide?

For each appointment listed, the report displays the following information:

- A. Appointment details** – The clinic, date, type, provider, patient name, chart number, and ADA code (or “Multiple” if there is more than one ADA code) associated with the appointment.
- B. Status change (waited)** – When the patient’s time in the waiting room started and stopped, and how long the patient waited.
- C. Status change (treated)** – When the patient’s time in an operatory started and stopped, and how long the patient was being treated.
- D. In-operatory statuses** – If **In Oper Tracking Statuses** were set when setting up options for this report, one or more status changes during treatment (such as imaging, sedation, treatment, and awake) may appear.
- E. Appointment subtotals** – The length of the appointment, according to the specified starting status and ending status. Also, the in-clinic wait time (ICWT) for the appointment.
- F. Average and median** – The average wait time and median wait time for all the appointments on the report.

Appointment Reminder Cards

Appointment Reminder Cards display a patient's next appointment date and time, along with a custom message.

	<p>Why: To print reminder post cards</p> <p>When: Monthly, semi-monthly, or as needed</p>
---	---

<p>Kirk O Baber 11 Maple Leaf Ln. Colmar, PA 18915</p>	<p>PMTS - DENTRIX DENTAL SYSTEMS Ken I Fillem, DDS 123 E. Valley Dr. Suite 500 American Fork, UT 84003 (801)555-9300</p> <p>Your next appointment with us is:</p> <p>A Tuesday - June 26, 2018 at 9:00 am</p> <p>B Present this card at your next appointment and receive 10% off your next tooth whitening.</p>
--	---

How do I run the Appointment Reminder Cards?



In the Ledger, from the **Print** menu, click **Walkout**, select **Appointment Card**, and then click **Print**. For additional details about running this report, see the “Walkout statements” topic in the Ledger portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Next Appointment Date and Time** – The patient’s next scheduled appointment.
- B. Custom Message** – The custom message entered when setting options for this report.

Appointment Statistics Report

The Appointment Statistics Report displays statistics for late appointments, on-time appointments, wait/will call appointments, broken appointments, appointments that remained in specified statuses for a specified length of time, and appointment durations based on specified statuses.

 	<p>Why: To view the productivity and efficiency of your practice regarding patient visits</p> <p>When: As needed</p>
--	--

Appointment Statistics

Appointment Date Range: 01/01/2017 - 12/31/2017
 Clinics: <ALL>
 Providers: <ALL>
 Remained in Statuses: APTSET
 Avg Appt Time Start Statuses: APTSET
 Avg Appt End Statuses: <COMPLETE>

A	Number of Scheduled Appointments that were late: 1 Number of Scheduled Appointments that were on time: 4 Number of Scheduled Appointments: 5 Number of Wait/Will Call Appointments: 0 Number of Broken Appointments: 0 Total Appointments: 5
B	Percent Broken Appointments: 0.00% <i>Calculation: Number of Broken Appointments divided by Number of Broken Appointments + Scheduled Appointments</i> Percent Late Appointments: 20.00% <i>Calculation: Number of Scheduled Appointments that were late divided by Number of Scheduled Appointments</i>
C	Number of Appointments that Remained in Status for 1 or more minutes: 1 Number of Appointments that Remained in Status less than 1 minutes: 0 Percent of Appointments that Remained in Status for 1 or more minutes: 100.00%
D	Average Appointment Time between status range (in minutes): 56

How do I run the Appointment Statistics Report?

In DXOne Reporting, select **Management**, and then double-click **Appointment Statistics**. Enter a date range, select the desired clinics and appointment providers, select appointment statuses, type your goal, select a beginning and an ending appointment status, and then click **OK**.

For additional details about running this report, see the “Appointment Statistics Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the Help menu of any module, click Contents).

What important information does this report provide?

This report relies on the same underlying functionality as the Appointment Book “Late Appt”

Tracking feature to monitor [changes in appointment statuses](#), but you do not have to enable late appointment tracking to run this report (of course, the report will not show late appointment statistics).

Important: If any appointments within the date range for which you are running this report have been purged using the purge utility in the Appointment Book or Office Manager, the report data may not be accurate.

A. Number of Appointments

- The number of late and on-time appointments that were scheduled.
- The number of wait/will call and broken appointments.

B. Broken and Late Appointment Percentages

- The number of broken appointments divided by the sum of the number of broken appointments and scheduled appointments.
- The number of late appointments divided by the number of scheduled appointments.

C. Remained in Status

- The number of appointments that remained in the specified statuses for more time than the specified goal but for less time than the specified number of minutes.
- The number of appointments that remained in the specified statuses for less time than the specified goal.
- The percentage of appointments that remained in the specified statuses for more time than the specified goal but for less time than the specified number of minutes.

D. Average Length – The average length of time in between the specified starting and ending statuses for appointments lasting up to the specified number of minutes.

Appointment Information - (Abbott, James S)

Prov: DSMITH >> Continuing Care Attached: Use Reason To Au

Reason: Initial Pc New Patient Exam

Desc: NP Ex

Length: 90 min >> Status: APTSET Op: OPT

Amount: 183.00 Schedule: FIXED Date: 00

RVU: 0.00 Type: Low Production Time: 9

Date	Status	Name
01/07/201	W/Call	haber, Kirk D
03/27/201	Broken	Abbott, Patricia
04/15/201	Broken	Box, Arthur

As Soon As Possible List

The As Soon As Possible List displays patients who want to move up their appointment time should an opening occur in the practice schedule.



Why: To assist in filling cancellations

When: Weekly or daily

AS SOON AS POSSIBLE LIST

Date Range: 05/06/2011 - 05/06/2018

Primary Providers: <ALL>

Appointment Providers: <ALL>

Report Date: 05/06/2018

Report Generated By: enterprise

Page 1 of 1



Date	Time	Status	Patient Name	PROV/OP	Appointment Reason	Length	Phone
05/06/2018	9:00 AM	xAPTSE	Brown, Mary	DDS1/OP1	NP Ex	1h 30m	(919) 555-1234
05/06/2018	10:30 AM	xLMTape	Perkins, Shelly	DDS1/OP1	4BWX, Emerg Ex	40m	(919) 555-4457
05/06/2018	9:00 AM	xEMER	Abbott, James S	DDS1/OP2	FabPtCr+B#7	10m	(919) 555-2345
05/06/2018	9:10 AM	xLMwrk	Crosby, Brent J	DDS2/OP2	LbVnPorLm#7	40m	(919) 555-4531
05/06/2018	10:00 AM		Smith, Michael	DDS2/OP2	CCAdult, ExtEval	1h 10m	(919) 555-6278

Total Listed: 5



How do I run the As Soon As Possible List?


From the DXOne Reporting module, select **List**, and then double-click **ASAP List**. For additional details about running this report, see the "As Soon As Possible (ASAP) List" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Patient and Appointment Information** – Each patient's name, status, and appointment date and time.
- B. Prov/Op** – The provider and operatory assigned to the appointment.
- C. Appointment Reason** – The description of procedures for the appointment.
- D. Length** – The appointment length.
- E. Phone** – The patient's phone number.

Assigned Rights Report

The Assigned Rights report lists the specified security rights assigned to users.



Why: To ensure security rights have been set up correctly for users across clinics

When: After Dentrix Enterprise setup, and as needed

ASSIGNED RIGHTS		
Clinics: <ALL>		
Users: <ALL>		
Rights: Selected		
<div style="display: flex; justify-content: space-between; font-size: small;"> Report Date: 04/29/2018 Report Generated By: enterprise Page 1 of 1 </div>		
USER	CLINIC	RIGHTS
ENTERPRISE	AF	Appointments - Delete, Appointments - Edit, Appointments - Purge
ENTERPRISE	CENTRAL	Appointments - Delete, Appointments - Edit, Appointments - Purge
ENTERPRISE	DRAPER	Appointments - Delete, Appointments - Edit, Appointments - Purge
ENTERPRISE	MESA	Appointments - Delete, Appointments - Edit, Appointments - Purge
ENTERPRISE	PINEDALE	Appointments - Delete, Appointments - Edit, Appointments - Purge
ENTERPRISE	PROVO	Appointments - Delete, Appointments - Edit, Appointments - Purge
ENTERPRISE	SPRING	Appointments - Delete, Appointments - Edit, Appointments - Purge
MCCLURE	AF	Appointments - Delete, Appointments - Edit, Appointments - Purge
MCCLURE	CENTRAL	Appointments - Delete, Appointments - Edit, Appointments - Purge
MCCLURE	DRAPER	Appointments - Delete, Appointments - Edit, Appointments - Purge
MCCLURE	MESA	Appointments - Delete, Appointments - Edit, Appointments - Purge
MCCLURE	PINEDALE	Appointments - Delete, Appointments - Edit, Appointments - Purge
MCCLURE	PROVO	Appointments - Delete, Appointments - Edit, Appointments - Purge
MCCLURE	SPRING	Appointments - Delete, Appointments - Edit, Appointments - Purge
MSMITH	CENTRAL	Appointments - Delete, Appointments - Edit, Appointments - Purge
MSMITH	MESA	Appointments - Delete, Appointments - Edit, Appointments - Purge
SLAUGH	AF	Appointments - Delete, Appointments - Edit, Appointments - Purge
SLAUGH	DRAPER	Appointments - Delete, Appointments - Edit, Appointments - Purge

A

B

C

How do I run the Assigned Rights Report?

From the DXOne Reporting module, select **Management**, and then double-click **Assigned Rights Report - Current**. For additional details about running this report, see the “Assigned Rights Report” topic in the DXOne Reporting portion of the Dentrax Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Users** – The providers and staff listed in the **Clinic Resource Setup** and **Password Administration** dialog boxes. (You can choose to group the users on the report by clinic when setting up the options for running the report.)
- B. Clinics** – The clinics to which the user has been assigned security rights.
- C. Rights** – The security rights assigned to the user.

Password Administration - Setup Users

User ID:	Clinic:	P/S:
AMCCLURE	MESA	P
DESMITH	PROVD	P
DHAYES	MESA	P
DROBB	MESA	P
DSMITH	CENTRAL	P
JKD1	MESA	P
MCCLURE	AF	P
MSMITH	MESA	S
SHAYES	CENTRAL	P

User Name: Smith, Dennis E
User ID: DSMITH
Change Password

Clinic selected: CENTRAL

Select Security Option Rights

- Administration
- Appointments
- Central Clinic Only
- Continuing Care
- Family File
- Chart
- Treatment Plans
- Completed Procedures
- Insurance
- Ledger
- Billing and Collections
- Letters

Clinic Resource Setup - The Dentist Group <CENTRAL>

Clinic Information
The Dental Group
1234 South Maple Drive
Mesa, AZ 85210
(801)555-1111
January

Administrative Contact:
Clinic ID: MESA

Operatories
MESA1
MESA2
MESA3
MESA4

Provider(s)
AMCCLURE - McClure, Angela
DHAYES - Hayes, Deborah
JKD1 - Kimball, Jacob A

Staff
MSMITH - Smith, Mary Kaye
TERICKSON - Erickson, Tracy

List Inactive Password Setup Electronic Rx Admin Patient Portal Setup Close

Audit Report - Appointments

The Audit - Appointments Report lists appointments that were created, altered, and deleted during the specified date range.

Why: To ensure that appointments are being scheduled, edited, and deleted in accordance with the desired security restrictions for each user, and to inform the doctor, office manager, and business owner of any situations so that appropriate action can be taken if necessary

When: Monthly and as needed

Report Date: 4/22/2018
Reported By: enterprise
Page 7 of 8

DATE CHANGED	USER CHANGED	OVERRIDING USER - SECURITY OPTION	PATIENT NAME	DATE	TIME	LENGTH	TYPE	STATUS	PRODUCTION	TYPE	AMOUNT	OPERATORY	PROVIDER
Date/Time: 3/8/2018 11:59:57AM	User Changed: Enterprise	-	<INSERTED> Little, Brian	03/14/2018	8:00 AM	180	FIXED	No Answer	High Production		1,110.00	HYG_1	DDS1
Date/Time: 3/8/2018 12:00:16PM	User Changed: Enterprise	-	<INSERTED> Little, Carol	03/14/2018	1:00 PM	200	FIXED	No Answer	High Production		2,470.00	HYG_1	DDS1
Date/Time: 3/8/2018 12:00:30PM	User Changed: Enterprise	-	<INSERTED> Little, Chad	03/14/2018	8:00 AM	50	FIXED	No Answer	High Production		1,540.00	OP_3	DDS1
Date/Time: 3/8/2018 12:00:48PM	User Changed: Enterprise	-	<INSERTED> Little, Dean	03/14/2018	9:00 AM	30	FIXED	No Answer	Low Production		111.00	OP_3	DDS1
Date/Time: 3/8/2018 12:01:19PM	User Changed: Enterprise	-	<INSERTED> Little, Kevin	03/14/2018	10:00 AM	10	FIXED	No Answer	Medium Production		274.00	OP_3	DDS1
Date/Time: 3/23/2018 12:10:09PM	User Changed: Enterprise	-	<INSERTED> Davis, Karen	03/28/2018	8:00 AM	30	FIXED	No Answer	High Production		218.00	OP_3	DDS1
Date/Time: 3/23/2018 12:11:20PM	User Changed: Enterprise	-	<INSERTED> Crosby, Brent L	03/28/2018	8:30 AM	50	FIXED	No Answer	Low Production		148.00	OP_3	DDS9
Date/Time: 3/23/2018 12:12:12PM	User Changed: Enterprise	-	<INSERTED> Crosby, Brent L	03/28/2018	8:30 AM	50	FIXED	No Answer	Low Production		148.00	OP_3	DDS9
Date/Time: 3/23/2018 12:12:33PM	User Changed: Enterprise	-	<DELETED>										
Date/Time: 3/23/2018 12:12:33PM	User Changed: Enterprise	-	<INSERTED> Crosby, Brent	03/28/2018	8:30 AM	40	FIXED	No Answer	High Production		1,000.00	OP_3	DDS9
Date/Time: 3/23/2018 12:13:33PM	User Changed: Enterprise	-	<INSERTED> Edwards, Anna	03/28/2018	9:10 AM	50	FIXED	No Answer	Low Production		0.00	OP_3	DDS1
Date/Time: 3/23/2018 12:13:56PM	User Changed: Enterprise	-	<INSERTED>										

How do I run the Audit Report - Appointments?

From the DXOne Reporting module, select **Audit**, and then double-click **Audit - Appointments**. For additional details about running this report, see the "Audit - Appointments Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Date/Time** – The date and time of the insertion, alteration, or deletion.
- B. Changing Users** – The user who made the change appears. Also, if another user (user B) entered his or her credentials to allow the user (user A) to make a change because user A didn't have the appropriate rights, user B and the security option being overridden appear.
- C. Original Value** – Details of the record in its original state. (For new records, this line will read, "<INSERTED>.")
- D. New Value** – Details of the record after the change. (For deleted records, this line will read, "<DELETED>.")

Audit Report - Audit Log Status

The Audit - Audit Log Status Report lists the changes to the “patient access logging” and “patient print logging” settings during the specified date range.

Why: To ensure that patient access and print logging is set up in accordance with the desired security restrictions for each user, and to inform the doctor, office manager, and business owner of any situations so that appropriate action can be taken if necessary

When: Monthly and as needed

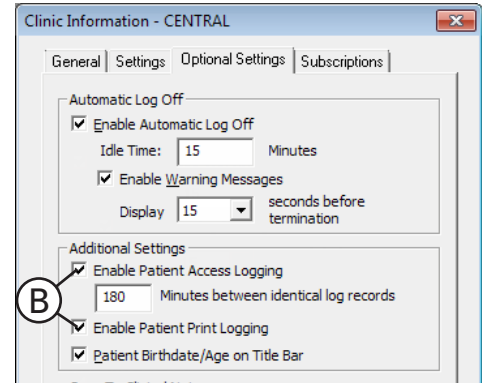
AUDIT REPORT - AUDIT LOG STATUS			
Audit Log Status report has been altered outside of Dentrix Enterprise!			
Date Range: 1/1/2018 - 1/9/2018			
Users: <ALL>			
Report Date: 01/09/2018			Page 1 of 1
DATE TIME	AUDIT LOG OPTION	STATUS	USER
01/03/2018 08:47:10 AM	Enable Patient Access Logg	Enabled	ELLIOT
01/03/2018 08:47:10 AM	Enable Patient Print Logging	Enabled	ELLIOT

How do I run the Audit Report - Audit Log Status?

From the DXOne Reporting module, select **Audit**, and then double-click **Audit - Audit Log Status**. For additional details about running this report, see the "Audit - Audit Log Status Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Date/Time** – The date and time of the setting change.
- B. Audit Log Option** – The **Enable Patient Access Logging** or **Enable Patient Print Logging** option.
- C. Status** – Enabled or disabled.
- D. User** – The user who made the change.



Audit Report - Clinics

The Audit - Clinics Report lists changes to clinic information during the specified date range.

Why: To ensure that practice information is being changed in accordance with the desired security restrictions for each user, and to inform the doctor, office manager, and business owner of any situations so that appropriate action can be taken if necessary

When: Monthly and as needed

AUDIT REPORT - CLINIC

Date Range: 05/11/2018 - 05/11/2018
Clinics: <ALL>
Users: <ALL>

Report Date: 05/11/2018 Reported By: enterprise Page 1 of 1

	DATE CHANGED	USER CHANGED	OVERRIDING USER - SECURITY OPTION		
OLD RECORD TYPE	EXTERNAL ID	PRACTICE TITLE	FISCAL YEAR MONTH	BANK DEPOSIT #	
	Date/Time: 05/11/2018 11:50:18AM	User Changed: enterprise			
CENTRAL	CENTRAL	The Dentist Group	January	43331677-1146	
CENTRAL	CENTRAL	The Dentist Group	January	43331677-1148	
	Date/Time: 05/11/2018 11:51:46AM	User Changed: enterprise			
CENTRAL	CENTRAL	The Dentist Group	January	43331677-1148	
CENTRAL	CENTRAL	The Allied Dentist Group	April	43331677-1148	
	Date/Time: 05/11/2018 11:52:28AM	User Changed: enterprise			
CENTRAL	CENTRAL	The Allied Dentist Group	April	43331677-1148	
CENTRAL	CENTRAL	The Allied Dentist Group	February	43331677-1148	

How do I run the Audit Report - Clinics?

From the DXOne Reporting module, select **Audit**, and then double-click **Audit - Clinics**. For additional details about running this report, see the "Audit - Clinics Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

This report tracks the changes made to the practice title, fiscal year month, and bank deposit number in the **Clinic Information** dialog box.

- A. Date/Time** – The date and time of the change of the clinic information.
- B. Changing Users** – The user who made the change appears. Also, if another user (user B) entered his or her credentials to allow the user (user A) to make a change because user A didn't have the appropriate rights, user B and the security option being overridden appear.
- C. Original Value** – Details of the record in its original state.
- D. New Value** – Details of the record after the change.

Audit Report - Combined

The Audit - Combined Report lists patient information that was created, altered, deleted, viewed, printed, and exported during the specified date range.

Why: To ensure that patient information is being inserted, edited, deleted, accessed, printed, and exported in accordance with the desired security restrictions for each user, and to inform the doctor, office manager, and business owner of any situations so that appropriate action can be taken if necessary

When: Monthly and as needed

AUDIT REPORT - COMBINED							
Date Range: 12/03/2017 - 12/03/2017							
Patient Range: Crosby, Brent - Crosby, Brent							
Clinics: <ALL>							
Users: <ALL>							
Sorted By: Date/Time							
Report Date: 12/09/2017	Report Generated By: enterprise					Page 1 of 4	
DATE/TIME	USER	OVERRIDE USER	PATIENT NAME (CHART #)	ACTION TYPE	DATA ACCESSED		
Old Record Type	Entry Date	Proc Date	Description	Amount	Encounter #	Clinic	Provider
New Record Type							
12/03/2017 10:09:02AM	ENTERPRISE		Crosby, Brent (CR0004C)	Patient Module Accessed		Family File	
						CENTRAL	
12/03/2017 10:40:52AM	ENTERPRISE		Crosby, Brent (CR0004C)	Patient Module Accessed		Family File	
						CENTRAL	
12/03/2017 10:44:38AM	ENTERPRISE		Crosby, Brent (CR0004C)	Patient Module Accessed		Patient Health Exchange	
						CENTRAL	
12/03/2017 10:45:18AM	ENTERPRISE		Crosby, Brent (CR0004C)	Exported		C-CDA	
						CENTRAL	
12/03/2017 1:32:17PM	DSMITH		Crosby, Brent (CR0004C)	Inserted		Patient Chart	
	<INSERTED>						
Completed Procedure	12/03/2017	12/03/2017	Resin-1 surface, poster	90.00	111212	AF	DESMITH
12/03/2017 1:33:15PM	DSMITH		Crosby, Brent (CR0004C)	Modified		Patient Chart	
Completed Procedure	12/03/2017	12/03/2017	Resin-1 surface, poster	90.00	111212	AF	DESMITH
Completed Procedure	12/03/2017	12/03/2017	Resin-1 surface, poster	90.00	111212	AF	DESMITH
12/03/2017 1:35:17PM	DSMITH		Crosby, Brent (CR0004C)	Patient Module Accessed		Patient Goals	
						AF	
12/03/2017 1:41:26PM	DSMITH		Crosby, Brent (CR0004C)	Patient Module Accessed		Patient Medical Alerts	
						AF	

How do I run the Audit Report - Combined?

From the DXOne Reporting module, select **Audit**, and then double-click **Audit - Combined**. For additional details about running this report, see the "Audit - Audit Log Status Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Date/Time** – The date and time of the insertion, alteration, deletion, accessing, printing, or exporting.
- B. User** – The user who made the change.
- C. Override User** – If another user (user B) entered his or her credentials to allow the user (user A) to make a change because user A didn't have the appropriate rights, user B appears.
- D. Patient Name (Chart #)** – The patient whose record was accessed.
- E. Action Type** – What action was performed, such as a module was accessed or a C-CDA document was exported.
- F. Data Accessed** – The module or area of Dentrix Enterprise that was accessed.
- G. Original Value** – Details of the record in its original state.
- H. New Value** – Details of the record after the change.

Audit Report - Patients

The Audit - Patients Report lists when patient information and medical consultations notes were created, altered, and deleted during the specified date range.

Why: To ensure that patient information is being changed in accordance with the desired security restrictions for each user, and to inform the doctor, office manager, and business owner of any situations so that appropriate action can be taken if necessary

When: Monthly and as needed

AUDIT REPORT - PATIENT									
Date Range: 02/01/2018 - 02/28/2018									
Patient Range: Abbott, James S - Abbott, Patricia									
Clinics: <ALL>									
Users: <ALL>									
Report Date: 3/2/2018		Report Generated By: enterprise						Page 1 of 1	
DATE CHANGED	USER CHANGED	OVERRIDING USER - SECURITY OPTION				RECORD TYPE			
PATIENT NAME (CHART)	SS # or REQUEST DATE	OTHER ID	BT	STATUS	GUARANTOR NAME (CHART)	CLINIC	PROVIDER		
Date/Time: 2/16/2018 10:13:59AM									
User Changed: Enterprise									
Abbott, James S (ABB101)				Active	Abbott, Patricia (ABB102)			Patient Changes	
Abbott, James S (ABB101)				Active	Abbott, Patricia (ABB102)	CENTRAL	DROB1		
						CENTRAL	DDS9		
Date/Time: 2/16/2018 10:14:10AM									
User Changed: Enterprise									
Abbott, Patricia (ABB102)				Active	Abbott, Patricia (ABB102)			Patient Changes	
Abbott, Patricia (ABB102)				Active	Abbott, Patricia (ABB102)	MESA	DDS1		
						MESA	DDS9		
Date/Time: 2/16/2018 10:14:17AM									
User Changed: Enterprise									
Abbott, Patricia (ABB102)				Active	Abbott, Patricia (ABB102)			Patient Changes	
Abbott, Patricia (ABB102)				Active	Abbott, Patricia (ABB102)	MESA	DDS9		
						CENTRAL	DDS9		
Date/Time: 2/21/2018 12:17:01PM									
User Changed: Enterprise									
Abbott, Patricia (ABB102)	000-00-0023			Active	Abbott, Patricia (ABB102)			Patient Changes	
Abbott, Patricia (ABB102)	000-00-0003			Active	Abbott, Patricia (ABB102)	CENTRAL	DDS9		
						CENTRAL	DDS9		
Date/Time: 2/21/2018 3:46:43PM									
User Changed: Enterprise									
Abbott, James S (ABB101)				Active	Abbott, Patricia (ABB102)			Patient Changes	
Abbott, James S (ABB101)			4	Active	Abbott, James S (ABB101)	CENTRAL	DDS9		
						CENTRAL	DDS9		
Date/Time: 2/21/2018 3:46:43PM									
User Changed: Enterprise									
Abbott, Patricia (ABB102)				Active	Abbott, Patricia (ABB102)			Patient Changes	
Abbott, Patricia (ABB102)			4	Active	Abbott, James S (ABB101)	CENTRAL	DDS9		
						CENTRAL	DDS9		

How do I run the Audit Report - Patients?

From the DXOne Reporting module, select **Audit**, and then double-click **Audit - Patients**. For additional details about running this report, see the "Audit - Patients Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

This report tracks when changes have been made to the patient information, which can be accessed by double-clicking the **Patient Information** block in the Family File, and to medical consultations notes, which can be accessed by clicking the **Medical Consultations** button in the Family File.

- A. Date/Time** – The date and time of the change.
- B. Changing Users** – The user who made the change appears. Also, if another user (user B) entered his or her credentials to allow the user (user A) to make a change because user A didn't have the appropriate rights, user B and the security option being overridden appear.
- C. Record Type** – The type of change made, such as a change to the patient information or medical consultation notes.
- D. Original Value** – Details of the record in its original state. (For new records, this line will read, "<INITIAL ENTRY>.")
- E. New Value** – Details of the record after the change. (For deleted records, this line will read, "<DELETED>.")

Audit Report - Providers/Staff

The Audit - Providers/Staff Report lists changes to provider and staff information during the specified date range.

Why: To ensure that provider/staff information is being changed in accordance with the desired security restrictions for each user, and to provide a legal document to inform the doctor, office manager, and business owner of any situations so that appropriate action can be taken

When: Monthly and as needed

AUDIT REPORT - PROVIDER\STAFF								
Date Range: 05/12/2018 - 05/12/2018								
Clinics: <ALL>								
Users: <ALL>								
Providers: <ALL>								
Report Date: 05/12/2018		Reported By: enterprise					Page 1 of 1	
DATE CHANGED		USER CHANGED			OVERRIDING USER - SECURITY OPTION			
OLD RECORD TYPE	EXTERNAL ID	PROVIDER\STAFF NAME	CLASS	FEE SCHEDULE	SS #	CLINIC	LOGIN NAME	
NEW RECORD TYPE								
Date/Time: 05/12/2018 9:51:07AM User Changed: enterprise								
Provider	DDS01	Smith, Dennis	Primary	1	--	CENTRAL	DDS01	
Provider	DDS01	Smith, Dennis	Primary	2	--	CENTRAL	DDS01	
Date/Time: 05/12/2018 9:52:00AM User Changed: enterprise								
Provider	DDS01	Smith, Dennis	Primary	6	--	CENTRAL	DDS01	
Provider	DDS01	Smith, Dennis	Primary	1	--	CENTRAL	DDS01	
Date/Time: 05/12/2018 9:53:18AM User Changed: enterprise								
Staff	HYG01	McClure, Angie	Primary	--	--	CENTRAL		
Staff	HYG01	McClure, Angi	Primary	--	--	MESA		
Date/Time: 05/12/2018 9:54:25AM User Changed: enterprise								
Staff	HYG01	McClure, Angi	Primary	--	--	MESA		
Staff	HYG01	McClure, Angi	Primary	--	--	CENTRAL		
Date/Time: 05/12/2018 9:55:14AM User Changed: enterprise								
Provider	DDS01	Smith, Dennis	Primary	1	--	CENTRAL	DDS01	
Provider	DDS01	Smith, Dennis	Secondary	1	--	CENTRAL	DDS01	
Date/Time: 05/12/2018 9:56:13AM User Changed: enterprise								
Provider	DDS01	Smith, Dennis	Secondary	1	--	CENTRAL	DDS01	
Provider	DDS01	Smith, Dennis	Primary	1	--	CENTRAL	DDS01	
Date/Time: 05/12/2018 10:06:51AM User Changed: enterprise								
<INSERTED>								
Staff	STF04	Brown, Mary	Primary	--	--	CENTRAL		

How do I run the Audit Report - Providers/Staff?

From the DXOne Reporting module, select **Audit**, and then double-click **Audit - Providers/Staff**. For additional details about running this report, see the "Audit - Providers/Staff Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

This report tracks the changes made to the provider's or staff member's name, provider's class, provider's fee schedule selection, provider's or staff member's assigned clinic, and provider's or staff member's login information in the **Provider Information** (or **Staff Information**) dialog box.

- A. Date/Time** – The date and time of the change of the provider/staff information.
- B. Changing Users** – The user who made the change appears. Also, if another user (user B) entered his or her credentials to allow the user (user A) to make a change because user A didn't have the appropriate rights, user B and the security option being overridden appear.
- C. Original Value** – Details of the record in its original state. (For new records, this line will read, "<INSERTED>.")
- D. New Value** – Details of the record after the change.

Audit Report - Transactions

The Audit - Transactions Report lists transactions (completed procedures, guarantor payments, insurance payments, and adjustments) that were posted, changed, and deleted during the specified date range.

Why: To ensure that transactions are being posted, altered, and deleted in accordance with GAAP (Generally Accepted Accounting Principles) and the desired security restrictions for each user, and to provide a legal document to inform the doctor, office manager, and business owner of any situations so that appropriate action can be taken

When: Monthly and as needed

AUDIT REPORT - TRANSACTIONS										
Date Range: 05/01/2018 - 05/01/2018 Patient Range: <ALL> - <ALL> Clinics: <ALL> Users: <ALL>										
Report Date: 06/26/2018		Reported By: enterprise					Page 1 of 3			
DATE CHANGED		USER CHANGED			OVERRIDING USER - SECURITY OPTION					
Old Record Type	New Record Type	Patient Name (Chart)	Entry Date	Proc Date	Description	Check #	Amount	Encounter #	Clinic	Provider
<i>Date Changed: 05/01/2018 11:04:48</i>		<i>User Changed: ENTERPRISE</i>								
	<INSERTED>									
Adjustment		Crosby, Brent ()	05/01/2018	05/01/2018	+Patient Refund		50.00		CENTRAL	DDS1
<i>Date Changed: 05/01/2018 11:05:27</i>		<i>User Changed: ENTERPRISE</i>								
Adjustment		Crosby, Shirley ()	05/01/2018	05/01/2018	+Patient Refund		50.00		CENTRAL	DDS1
	<DELETED>									
<i>Date Changed: 05/01/2018 11:05:53</i>		<i>User Changed: ENTERPRISE</i>								
	<INSERTED>									
Adjustment		Perkins, Dave ()	05/01/2018	05/01/2018	-Credit Adjustment		-50.00		CENTRAL	<MULTIPLE>
<i>Date Changed: 05/01/2018 12:06:16</i>		<i>User Changed: ENTERPRISE</i>								
Completed Procedure		Abbott, James S (ABB101)	04/22/2018	04/22/2018	Prophylaxis-adult		0.00		CENTRAL	<MULTIPLE>
Completed Procedure		Abbott, James S (ABB101)	04/22/2018	04/22/2018	Prophylaxis-adult		90.00		CENTRAL	DDS1
	<DELETED>									
<i>Date Changed: 05/01/2018 12:06:26</i>		<i>User Changed: ENTERPRISE</i>								
Completed Procedure		Abbott, James S (ABB101)	04/22/2018	04/22/2018	Periodic oral evaluation		0.00		CENTRAL	<MULTIPLE>
Completed Procedure		Abbott, James S (ABB101)	04/22/2018	04/22/2018	Periodic oral evaluation		30.00		CENTRAL	DDS1
	<DELETED>									
<i>Date Changed: 05/01/2018 12:06:37</i>		<i>User Changed: ENTERPRISE</i>								
Completed Procedure		Abbott, James S (ABB101)	04/22/2018	04/22/2018	Bitewings-four films		0.00		CENTRAL	<MULTIPLE>
Completed Procedure		Abbott, James S (ABB101)	04/22/2018	04/22/2018	Bitewings-four films		250.00		CENTRAL	DDS1
	<DELETED>									
<i>Date Changed: 05/01/2018 12:06:52</i>		<i>User Changed: ENTERPRISE</i>								
Completed Procedure		Abbott, James S (ABB101)	04/22/2018	04/22/2018	Panoramic film		0.00		CENTRAL	<MULTIPLE>
Completed Procedure		Abbott, James S (ABB101)	04/22/2018	04/22/2018	Panoramic film		158.00		CENTRAL	DDS1
	<DELETED>									
<i>Date Changed: 05/01/2018 12:07:17</i>		<i>User Changed: ENTERPRISE</i>								
Insurance Payment		Abbott, James S (ABB101)	04/27/2018	04/27/2018	Insurance Payment	44587	-698.40		CENTRAL	<MULTIPLE>
	<DELETED>									
<i>Date Changed: 05/01/2018 12:21:36</i>		<i>User Changed: ENTERPRISE</i>								
	<INSERTED>									
Completed Procedure		Winters, Beth (PA0007)	05/01/2018	05/01/2018	Extraction crnl remnts-decid th		500.00		CENTRAL	DDS01

How do I run the Audit Report - Transactions?

From the DXOne Reporting module, select **Audit**, and then double-click **Audit - Transactions**. For additional details about running this report, see the "Audit - Transactions Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Date/Time** – The date and time of the change of the provider/staff information.
- B. Changing Users** – The user who made the change appears. Also, if another user (user B) entered his or her credentials to allow the user (user A) to make a change because user A didn't have the appropriate rights, user B and the security option being overridden appear.
- C. Original Value** – Details of the record in its original state. (For new records, this line will read, "<INSERTED>.")
- D. New Value** – Details of the record after the change. (For deleted records, this line will read, "<DELETED>.")

Audit Rights Report - Assigned Individually

The Audit Rights - Assigned Individually Report lists security rights that were granted to or removed from users during the specified date range.

Why: To ensure that security rights are being assigned in accordance with the desired security restrictions for each user, and to inform the doctor, office manager, and business owner of any situations so that appropriate action can be taken if necessary

When: Monthly and as needed

Audit Rights - Assigned Individually						
Date Range: 12/12/2017 - 12/12/2017						
Users: DSMITH						
Clinics: <ALL>						
Users who made change: DSMITH						
Display Date Changed value in: Logged on Clinic						
Report Generated By: DSMITH Page 1 of 5						
DATE CHANGED	ACTION	USER CHANGED	OLD SECURITY RIGHT	NEW SECURITY RIGHT	OLD CLINIC	NEW CLINIC
12/12/2017 12:45:30PM	Removed	DSMITH	My Clinics, View		AF	DSMITH
12/12/2017 12:45:30PM	Removed	DSMITH	Integration Settings, File Exchange		AF	DSMITH
12/12/2017 12:45:30PM	Added	DSMITH	Treatment Request, Open		AF	DSMITH
12/12/2017 12:45:30PM	Added	DSMITH	Treatment Request, Add/Edit		AF	DSMITH
12/12/2017 12:45:30PM	Added	DSMITH	Treatment Request, Delete		AF	DSMITH
12/12/2017 12:47:31PM	Added	DSMITH	My Clinics, View		AF	DSMITH
12/12/2017 12:47:53PM	Removed	DSMITH	Audit, Clear		CENTRAL	DSMITH
12/12/2017 12:47:53PM	Removed	DSMITH	Dentrix, Log on		CENTRAL	DSMITH
12/12/2017 12:47:53PM	Removed	DSMITH	Print Insurance Aging Reports		CENTRAL	DSMITH
12/12/2017 12:47:53PM	Removed	DSMITH	Audit, Send To Batch		CENTRAL	DSMITH
12/12/2017 12:47:53PM	Removed	DSMITH	Transactions, Delete		CENTRAL	DSMITH
12/12/2017 12:47:53PM	Removed	DSMITH	Transactions, Edit		CENTRAL	DSMITH
12/12/2017 12:47:53PM	Removed	DSMITH	Transactions, Enter		CENTRAL	DSMITH
12/12/2017 12:47:53PM	Removed	DSMITH	ODBC Data Access		CENTRAL	DSMITH
12/12/2017 12:47:53PM	Removed	DSMITH	Clinical Record, Modify		CENTRAL	DSMITH
12/12/2017 12:47:53PM	Removed	DSMITH	Month End Wizard		CENTRAL	DSMITH
12/12/2017 12:47:53PM	Removed	DSMITH	Practice Assistant		CENTRAL	DSMITH

How do I run the Audit Rights Report - Assigned Individually?

From the DXOne Reporting module, select **Audit**, and then double-click **Audit Rights - Assigned Individually**. For additional details about running this report, see the “Audit Rights - Assigned Individually Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Date/Time** – The date and time of the security right assignment or removal.
- B. Action** – Whether the right was added or removed.
- C. Changing User** – The user who made the change.
- D. Original Value** – Details of the record before being removed.
- E. New Value** – Details of the record after being added.

Audit Rights Report - Assigned to Groups

The Audit Rights - Assigned to Groups Report lists security rights that were granted to or removed from user groups during the specified date range.

Why: To ensure that security rights are being assigned in accordance with the desired security restrictions for each user group, and to inform the doctor, office manager, and business owner of any situations so that appropriate action can be taken if necessary

When: Monthly and as needed

Audit Rights - Assigned to Groups					
Date Range: 1/1/2017 - 12/12/2017					
Group Names: <ALL>					
Users who made change: DSMITH					
Display Date Changed value in: Logged on Clinic					
Report Generated By: DSMITH Page 1 of 2					
DATE CHANGED	ACTION	USER CHANGED	OLD GROUP NAME	NEW GROUP NAME	NEW SECURITY RIGHT
1/31/2017 4:12:25PM	Removed	DSMITH	Doctors		Password, Multi-Clinics
1/31/2017 4:12:25PM	Removed	DSMITH	Doctors		Chart, Open
1/31/2017 4:13:40PM	Added	DSMITH	Doctors		Chart, Open
3/20/2017 4:51:03PM	Added	DSMITH	Doctors		My Clinics, View
3/20/2017 4:51:03PM	Added	DSMITH	Doctors		My Clinics, Select Provider
3/20/2017 4:51:03PM	Added	DSMITH	Doctors		My Clinics, View
3/20/2017 4:51:03PM	Added	DSMITH	Doctors		My Clinics, View
3/20/2017 4:51:03PM	Added	DSMITH	Doctors		Security Rights Setup, View All Users
3/20/2017 4:51:32PM	Removed	DSMITH	Admins		Password, Multi-Clinics
3/20/2017 4:51:32PM	Added	DSMITH	Admins		My Clinics, View
3/20/2017 4:51:32PM	Added	DSMITH	Admins		My Clinics, Select Provider
3/20/2017 4:51:32PM	Added	DSMITH	Admins		My Clinics, View
3/20/2017 4:51:32PM	Added	DSMITH	Admins		My Clinics, View
3/20/2017 4:51:32PM	Added	DSMITH	Admins		My Clinics, View
3/20/2017 4:51:42PM	Removed	DSMITH	Billing		Security Rights Setup, View All Users
3/20/2017 4:51:42PM	Added	DSMITH	Billing		Password, Multi-Clinics
3/20/2017 4:51:42PM	Added	DSMITH	Billing		My Clinics, View
3/20/2017 4:51:42PM	Added	DSMITH	Billing		My Clinics, Select Provider

How do I run the Audit Rights Report - Assigned to Groups?

From the DXOne Reporting module, select **Audit**, and then double-click **Audit Rights - Assigned to Groups**. For additional details about running this report, see the “Audit Rights - Assigned to Groups Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Date/Time** – The date and time of the security right assignment or removal.
- B. Action** – Whether the right was added or removed.
- C. Changing User** – The user who made the change.
- D. Original Value** – Details of the record before being removed.
- E. New Value** – Details of the record after being added.

Audit Rights Report - Group Names

The Audit Rights - Group Names Report lists new, deleted, and renamed user groups during the specified date range.

Why: To ensure that security user groups are being managed in accordance with the desired policies, and to inform the doctor, office manager, and business owner of any situations so that appropriate action can be taken if necessary

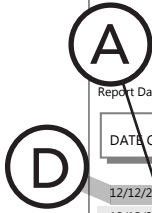
When: Monthly and as needed

Audit Rights - Group Names

Date Range: 12/12/2017 - 12/12/2017
 Users Changed: DSMITH
 Group Names: <ALL>
 Display Date Changed value in: Logged on Clinic

Report Date: 12/12/2017 Report Generated By: DSMITH Page 1 of 1

DATE CHANGED	ACTION	USER CHANGED	OLD NAME/CREATED	NEW NAME/DELETED
12/12/2017 1:25:29PM	Edited	DSMITH	Billing	BillingCoords
12/12/2017 1:26:19PM	Created	DSMITH	Created	IT
12/12/2017 1:26:39PM	Deleted	DSMITH	IT	Deleted
12/12/2017 1:26:51PM	Edited	DSMITH	BillingCoords	Billing



How do I run the Audit Rights Report - Group Names?

From the DXOne Reporting module, select **Audit**, and then double-click **Audit Rights - Group Names**. For additional details about running this report, see the "Audit Rights - Group Names Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Date/Time** – The date and time of the security right assignment or removal.
- B. Action** – The type of change made.
- C. Changing User** – The user who made the change.
- D. Original/New Values** – Details of the record before and after the change. If the record was created, the original value displayed is "Created." If the record was deleted, the new value displayed is "Deleted."

Audit Rights Report - Users to Groups

The Audit Rights - Users to Groups Report lists users who were added to or removed from user groups during the specified date range.

Why: To ensure that users are being assigned to user groups in accordance with the desired security restrictions for each user group, and to inform the doctor, office manager, and business owner of any situations so that appropriate action can be taken if necessary

When: Monthly and as needed

Audit Rights - Users to Groups

Date Range: 1/1/2017 - 12/12/2017
 Group Names: <ALL>
 Users who made change: DSMITH
 Users Changed: DSMITH
 Clinics Changed: AF, ALPINE, CENTRAL
 Display Date Changed value in: Logged on Clinic

Report Generated By: DSMITH Page 1 of 1

DATE CHANGED	ACTION	USER CHANGED	OLD GROUP NAME	OLD USER	OLD CLINIC
			NEW GROUP NAME	NEW USER	NEW CLINIC
3/20/2017 4:57:36PM	Removed	DSMITH	Doctors	DSMITH	CENTRAL
3/20/2017 4:57:36PM	Removed	DSMITH	Doctors	DSMITH	ALPINE
3/20/2017 4:57:36PM	Added	DSMITH	Doctors	DSMITH	CENTRAL
3/20/2017 4:57:36PM	Added	DSMITH	Doctors	DSMITH	ALPINE
3/20/2017 5:01:31PM	Removed	DSMITH	Doctors	DSMITH	AF
3/20/2017 5:01:36PM	Removed	DSMITH	Doctors	DSMITH	ALPINE
3/20/2017 5:01:45PM	Removed	DSMITH	Doctors	DSMITH	CENTRAL
3/20/2017 5:03:49PM	Added	DSMITH	Admins	DSMITH	CENTRAL
3/20/2017 5:03:49PM	Added	DSMITH	Admins	DSMITH	ALPINE
3/20/2017 5:03:49PM	Added	DSMITH	Admins	DSMITH	AF



How do I run the Audit Rights Report - Users to Groups?

From the DXOne Reporting module, select **Audit**, and then double-click **Audit Rights - Users to Groups**. For additional details about running this report, see the "Audit Rights - Users to Groups Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Date/Time** – The date and time of the security right assignment or removal.
- B. Action** – Whether the user was added or removed.
- C. Changing User** – The user who made the change.
- D. Original Value** – Details of the record before being removed.
- E. New Value** – Details of the record after being added.

Billing Statement

Billing statements provide guarantor's with a record of their financial transactions with the practice.

Why: To keep patients informed of their financial standing
When: Monthly or semi-monthly

STATEMENT OF ACCOUNT

The Dentist Group
123 East Valley Drive
American Fork, UT 84003

(801)555-9300

CHART NO. DAV100	PAGE NO. 1
BILLING DATE 06/10/2018	

CREDIT CARD # _____ EXP. _____

NAME _____
(As it appears on card)

SIGNATURE _____

TYPE OF CARD _____

AMOUNT ENCLOSED
\$ _____

GUARANTOR NAME AND MAILING ADDRESS
 Karen Davis
1234 N Pine St
Provo, UT 84601

TO INSURE PROPER CREDIT, PLEASE DETACH AND RETURN THIS PORTION OF THE STATEMENT WITH YOUR PAYMENT

PLEASE RETAIN THIS PORTION OF THE STATEMENT FOR YOUR RECORDS

DATE	DESCRIPTION	PATIENT'S NAME	CHARGES	CREDITS
02/10/2018	Balance Forward		1428.80	
* 02/26/2018	Root canal therapy - anterior	Karen	333.00	
* 02/27/2018	Therapeutic pulpotomy(exc rest)	Kelly	92.00	
* 02/27/2018	Extraction-single tooth	Robert	71.00	

* Indicates that insurance has been billed for the procedure.

Charges on account over 90 days. PLEASE PAY IMMEDIATELY!

CURRENT BALANCE	OVER 30 DAYS	OVER 60 DAYS	OVER 90 DAYS	TOTAL BALANCE	INSURANCE EST.
0.00	0.00	0.00	1924.80	1924.80	0.00

Payment is Due on July 1, 2018

PLEASE PAY THIS AMOUNT →

1924.80

©DENTRIX 1987-2018 DLSTM 2 The Dentist Group - 123 East Valley Drive American Fork, UT 84003 (801)555-9300

How do I generate billing statements?

In the Office Manager, from the **Reports** menu, click **Billing**. Or, for a specific family, in the Ledger, from the **Print** menu, click **Statement**. For additional details about running this report, see the “Billing statements” topic in the Office Manager and Ledger portions of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does the statement provide?

- A. Payment Slip** – The portion of the billing statement that can be cut off and returned with the payment.
- B. Financial Transactions** – The financial transactions posted to the guarantor’s account since the previous billing statement.
- C. Financial Summary** – The guarantor’s current balance, prior balance, and total of credits and charges applied during the current billing cycle.
*Note: If you select **Print Account Aging** when setting options for generating statements, this section displays the guarantor’s aged balances.*
- D. Credit Card Information** – If you select **Allow Credit Card Payments** when setting options for generating statements, the credit card information lines appear on the payment slip.
- E. Dunning Message/Guarantor Note** – If a guarantor note has been entered for a guarantor, the note prints on the guarantor’s billing statements. If no guarantor note has been entered, the appropriate dunning message is printed. For details about how to enter guarantor notes or dunning messages, see the “Working with guarantor notes” or “Dunning messages” topics in the Ledger or Office Manager portions of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).
- F. Insurance Estimate Box** – If you select **Print Dental Insurance Estimate** when setting options for billing statements, the insurance estimate box appears on the statement.
- G. Statement Note** – If you entered a note in the **Statement Message** field when setting options for billing statements, the text of that note appears on each statement.
- H. Please Pay This Amount Box** – If you select **Print Agreed Payment** when setting options for billing statements, the Please Pay This Amount box appears on the statement.

Birthday List

The Birthday List displays patients whose birthdays fall on a selected month, day, and/or year. This report can also be run for a given date or date range.



Why: To assist in preparing birthday cards for patients

When: As needed

BIRTHDAY LIST

Birthday Range: Month: 5 - Month: 6
 Clinics: <ALL>
 Provider: <ALL>
 Billing Types: <ALL>
 Patient Range:<ALL> - <ALL>

Report Date: 05/06/2018

Report Generated By: enterprise

Page 1 of 37

PATIENT NAME	BIRTHDATE
Abbott, James 123 Pine Drive Atlanta, GA. 30361	11/11/1930
Abbott, Patricia 123 Pine Drive Yardley, PA. 19067	11/11/1965
Brown, Mary J 1234 Maple Avenue Springfield, PA. 19064	11/11/1965
Crosby, Brent G 12345 Oak St. Media, PA. 19063	11/11/1955
Crosby, Shirley 123 Hickory Place Kailua, TN. 77301	11/11/1974
Davis, Harmon 1234 Black Road Barstow, RI. 95765	11/11/1969
Edwards, Johnathan 1234 Grove Way Elk Grove, RI. 95750	11/11/1996
Edwards, John 1234 West Pond Dr. Kailua, TN. 77301	11/11/1960
Farrer, Lisa E. 12 Clover Ln Kailua, TN. 77301	11/11/1927
Gleason, Alice F 12345 Hope Rd Lowland Heights, IN. 40870	11/11/1955
Gleason, Gary O. 123 Wild Rd Kailua, TN. 77301	11/11/1926

A

B

How do I run the Birthday List?


From the DXOne Reporting module, select **List**, and then double-click **Birthday List**. For additional details about running this report, see the “Birthday List” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Patient Details** – The patient’s name and mailing address.
- B. Birth Date** – The patient’s birth date.

Caries Prevalence and Periodontal Index Report

The Caries Prevalence and Periodontal Index Report indicates, for various ages and age ranges, the percent of patients who have caries and how many do not, the percent of patients with certain conditions, and the percent of patients with certain pocket depths and clinical attachment levels.

	Why: To print a record of patient statistics for caries, conditions, and perio measurements
	When: Quarterly

Caries Prevalence and Periodontal Index Report	
Date Range: 05/27/2018 - 05/28/2018 Clinics: <ALL>	
Report Date: 05/28/2018	Report Generated By: enterprise
Page 1 of 3	
Preschool children (2-5 years):	
dmfs / dmft	20 / 12
Mean dmfs for Max. Incisors & Posterior teeth	133.33
Percent with history of decay on...	
anterior teeth	66.67%
posterior teeth	66.67%
both anterior and posterior teeth	66.67%
Percent with caries history on >= 1 maxillary incisors	
Percent with caries history on >= 2 maxillary incisors	33.33%
Percent with caries history on >= 1 maxillary incisors or dmft >= 6	0.00%
Percent with caries history on >= 1 maxillary incisors or dmft >= 6	66.67%
Percent with dmfs > 0	
maxillary incisor decay only	66.67%
posterior decay only	66.67%
both posterior and incisor decay	66.67%
Percent caries free children by individual ages and age cohorts	
2 Years:	50.00%
3 Years:	0.00%
4 Years:	0.00%
5 Years:	0.00%
2-4 Years:	50.00%
3-5 Years:	0.00%
2-5 Years:	50.00%

How do I run the Caries Prevalence and Periodontal Index Report?

From the DXOne Reporting module, select **List**, and then double-click **Caries Prevalence and Periodontal Index Report**. For additional details about running this report, see the “Caries Prevalence and Periodontal Index Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

This report prints on three pages with statistics for five age groups:

- The age group 2 - 5 years is on the first page.
- The age groups 6 - 14 years and 15 - 19 years are on the second page.
- The age groups 35 - 44 years and 55 years and older are on the third page.

Terms Used

You need to be familiar with the following terms before reading this report:

- **Caries Free** – No decayed, missing, or filled teeth
- **CPITN** – Community Periodontal Index of Treatment Needs
- **Dmfs** – Decayed, missing, or filled surfaces on primary teeth
- **DMFS** – Decayed, missing, or filled surfaces on permanent teeth
- **Dmft** – Decayed, missing, or filled primary teeth
- **DMFT** – Decayed, missing, or filled permanent teeth
- **Dentate** – Having teeth (i.e. a patient who does not have a full set of dentures)
- **Fluorosis** – An abnormal condition of the tooth enamel caused by excessive exposure to fluoride

Age Group 2 - 5 Years

The data for each of the following statistics is listed by individual ages and age ranges:

A. dmfs / dmft

- **dmfs** – The total number of surfaces with one or more untreated caries for all patients in the age group, total number of surfaces with one or more fillings, and total number of teeth (multiplied by 5 surfaces) that have been extracted (using the oral surgery procedures D7111, D7140, D7210, D7220, D7230, D7240, D7241, D7250). A surface with a code posted for untreated followed by a code posted for restoration or extraction only counts once.
- **dmft** – The total number of teeth with one or more untreated caries for all patients in the age group, the total number of teeth with one or more fillings, and the total number of teeth that have been extracted (using the oral surgery procedures D7111, D7140, D7210, D7220, D7230, D7240, D7241, D7250) or are missing. A tooth with a code posted for untreated followed by a code posted for restoration or extraction only counts once.

- B. Mean dmfs** – The mean dmfs for maxillary incisors and posterior teeth, which is the dmfs of maxillary incisors (c - h) and posterior teeth (a, b, i, j, k, l, s, and t) for all patients in the age group divided by the number of patients in the age group. A surface with an untreated caries code that has been fixed later is counted only once.
- C. Decay History** – The percent of patients in the age group with a history of decay. The statistics are broken down by decay on anterior teeth, posterior teeth, and both. Each value is the total number of patients in the age group with a caries code (15104, 15105, 15106, or 15107) or restorative code on any anterior, posterior, or anterior and posterior teeth divided by the number of patients in the age group.
- D. Caries History** – The percent of patients in the age group with caries history. The statistics are broken down by one or more caries on any maxillary incisor, two or more caries on any maxillary incisor, and one or more caries on any maxillary incisors or where dmft is greater than or equal to 6. Each value is the total number of patients in the age group with a caries code (15104, 15105, 15106, or 15107) or restorative code on the given number of caries on any of the maxillary incisors (or the total number of patients in the age group with a dmft greater than or equal to 6) divided by the number of patients in the age group.
- E. dmfs > 0** – The percent of patients in the age group with a dmfs that is greater than 0.
- F. Caries Free** – The percent of patients of each given age (or in each given age range) without caries. To be considered caries free, a patient cannot have any of the following conditions or codes posted in the Chart:
- **Caries conditions** – 15104, 15105, 15106, or 15107.
 - **Missing teeth conditions** – 15100 or 15101.
 - **Procedure codes D2000** – D4276, D4910, D4999, D6000 – D6079, D6100, D6199 – D7259, or D7999.

**An explanation of the next page
of the report begins on page 56.**

Report Date: 05/28/2018 Report Generated By: enterprise Page 2 of 3

Ages 6-14 Years:

	Percent Caries Free		Percent with		Using Tobacco	Dental Fluorosis	Sealants	Sealants 1st Molar	Sealants 2nd molar	Sealants 1st or 2nd Molar	Mean # of sealed teeth	Mean dmft / DMFT
	Prim & Perm Teeth	Perm Teeth Only	Untreated Decay Prim & Perm teeth	Untreated Decay Perm teeth								
6 Years:	0.00	0.00	100.00	100.00	0.00	100.00	100.00	100.00	100.00	100.00	1.00	0.00 / 8.00
7 Years:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 / 0.00
8 Years:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 / 0.00
9 Years:	100.00	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 / 0.00
10 Years:	0.00	0.00	100.00	100.00	0.00	100.00	100.00	100.00	100.00	100.00	1.00	0.00 / 2.00
11 Years:	100.00	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 / 0.00
12 Years:	100.00	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 / 0.00
13 Years:	100.00	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 / 0.00
14 Years:	100.00	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 / 0.00
6-8 Years:	0.00	0.00	100.00	100.00	0.00	100.00	100.00	100.00	100.00	100.00	1.00	0.00 / 8.00
9-11 Years:	80.00	80.00	20.00	20.00	0.00	20.00	20.00	20.00	20.00	20.00	0.20	0.00 / 0.40
12-14 Years:	100.00	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 / 0.00
6-14 Years:	86.67	86.67	13.33	13.33	46.67	13.33	13.33	13.33	13.33	13.33	0.43	0.00 / 8.67

Ages 15-19 Years:

	Caries Free		Untreated Decay		Using Tobacco	Dental Fluorosis	Sealants	Sealants 1st Molar	Sealants 2nd molar	Sealants 1st or 2nd Molar	Mean # of sealed teeth	Mean DMFT
	Prim & Perm teeth	Perm Teeth Only	Prim & Perm teeth	Perm teeth								
15 Years:	92.31	7.69	7.69	7.69	7.69	7.69	7.69	7.69	7.69	7.69	0.08	0.38
16 Years:	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
17 Years:	96.67	3.33	3.33	3.33	3.33	3.33	3.33	3.33	3.33	3.33	0.03	0.13
18 Years:	96.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	0.04	0.16
19 Years:	96.15	3.85	3.85	3.85	3.85	3.85	3.85	3.85	3.85	3.85	0.04	0.12

	Percent with			Loss of Attachment < 3mm	Loss of Attachment >= 3mm and < 5mm	Loss of Attachment >= 5mm
	Pockets < 4mm	Pockets >= 4mm & < 6mm	Pockets >= 6mm			
15 Years:	0.00	0.00	0.00	0.00	0.00	0.00
16 Years:	0.00	0.00	0.00	0.00	0.00	0.00
17 Years:	3.33	3.33	3.33	3.33	3.33	3.33
18 Years:	4.00	4.00	4.00	4.00	4.00	4.00
19 Years:	3.85	0.00	0.00	3.85	3.85	0.00

Percent with Highest CPITN of 0,1,2,3,4

CPITN	Percent
4	1.77
3	0.00
2	0.88
1	0.00
0	0.00

Age Group 6 - 14 Years

The data for each of the following statistics is listed by individual ages and age ranges:

- F. Caries Free** – The percent of patients of each given age (or in each given age range) without caries. This statistic is broken down by primary and permanent teeth and permanent teeth only. To be considered caries free, a patient cannot have any of the following conditions or codes posted in the Chart:
- Caries conditions 15104, 15105, 15106, or 15107.
 - Missing teeth conditions 15100 or 15101.
 - Procedure codes D2000 – D4276, D4910, D4999, D6000 – D6079, D6100, D6199 – D7259, or D7999.
- G. Untreated Decay** – The percent of patients of each given age (or in each given age range) with untreated decay. An untreated caries is any caries condition code (15104, 15105, 15106, or 15107) that has not had either a procedure that covers the same surface posted after the caries condition code was posted or has not had the corresponding tooth extracted (an existing, existing other, or missing tooth condition is considered extracted for the purposes of this report). This statistic is broken down by primary and permanent teeth and permanent teeth only. A restoration code on a tooth followed chronologically by an untreated caries condition indicates that the tooth decayed again after it was fixed and is counted as untreated decay.
- H. Using Tobacco** – The percent of patients of each given age or in each given age range (with caries) who are using tobacco (patients who have the condition code “15203 Tobacco Use” posted in the Chart).
- I. Dental Fluorosis** – The percent of patients of each given age or in each given age range (with caries) who have dental fluorosis (patients who have the condition code “15200 Dental Fluorosis” posted in the Chart).
- J. Sealants** – The percent of patients of each given age or in each given age range (with caries) who have dental sealants (patients who have the sealant code D1351 posted in the Chart).
- K. Mean # of Sealed Teeth** – The total number of sealed teeth for all patients of each given age (or in each given age range) divided by the number of patients of each given age (or in each given age range).
- L. Mean dmft/DMFT** – The dmft/DMFT for all patients of each given age (or in each given age range) divided by the number of patients of each given age (or in each given age range). A tooth with an untreated caries code that has been fixed later is counted only once.

Age Group 15 - 19 Years

The data for each of the following statistics is listed by individual ages:

- F. Caries Free** – The percent of patients of each given age without caries. This statistic applies to both primary and permanent teeth. To be considered caries free, a patient cannot have any of the following conditions or codes posted in the Chart:
- **Caries conditions** – 15104, 15105, 15106, or 15107.
 - **Missing teeth conditions** – 15100 or 15101.
 - **Procedure codes** – D2000 to D4276, D4910, D4999, D6000 to D6079, D6100, D6199 to D7259, or D7999.

- G. Untreated Decay** – The percent of patients of each given age with untreated decay. An untreated caries is any caries condition code (15104, 15105, 15106, or 15107) that has not had either a procedure that covers the same surface posted after the caries condition code was posted or has not had the corresponding tooth extracted (an existing, existing other, or missing tooth condition is considered extracted for the purposes of this report). This statistic applies to both primary and permanent teeth. A restoration code on a tooth followed chronologically by an untreated caries condition indicates that the tooth decayed again after it was fixed and is counted as untreated decay.
- H. Using Tobacco** – The percent of patients of each given age (with caries) who are using tobacco (i.e. patients who have the condition code “15203 Tobacco Use” posted in the Chart).
- I. Dental Fluorosis** – The percent of patients of each given age (with caries) who have dental fluorosis (i.e. patients who have the condition code “15200 Dental Fluorosis” posted in the Chart).
- J. Sealants** – The percent of patients of each given age (with caries) who have dental sealants (i.e. patients who have the sealant code D1351 posted in the Chart).
- K. Mean # of Sealed Teeth** – The total number of sealed teeth for all patients of each given age divided by the number of patients of each given age.
- L. Mean dmft/ DMFT** – The dmft/ DMFT for all patients of each given age divided by the number of patients of each given age. A tooth with an untreated caries code that has been fixed later is counted only once.
- M. Perio Pockets** – The percent of patients of each given age with the specified perio pocket measurements.
- N. Loss of Attachment** – The percent of patients of each given age with the specified clinical attachment level.
- V. CPITN** – The percent of patients in both age groups combined (ages 6 – 19) with the highest CPITN of 0, 1, 2, 3, and 4. CPITN is calculated from periodontal exams within the date range of the report:
- Any patients who have a Probing Depth (PD or Pocket Depth) for any tooth higher than 6 mm are counted towards the 4 category and are not counted towards any other category.
 - Any patients who have a Probing Depth (PD or Pocket Depth) for any tooth of 4 - 6 mm are counted towards the 3 category and are not counted towards any other category.
 - Any patients that are marked as having Plaque (not set to “0 - None”) and a Probing Depth (PD or Pocket Depth) for any tooth less than 4 for any tooth are counted towards the 2 category and are not counted towards any other category.
 - Any patients that have bleeding marked for any tooth are counted towards the 1 category and are not counted towards any other category.
 - Any remaining patients should be counted towards the 0 category.

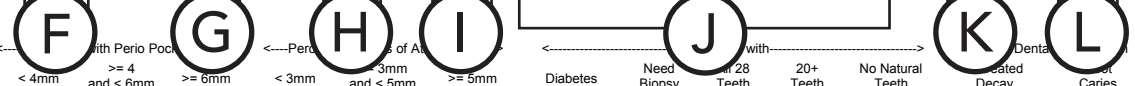
**An explanation of the next page
of the report begins on page 60.**

Report Date: 05/28/2018

Report Generated By: enterprise

Ages 35-44 & 55+ Years:

	Percent with								Mean # of sealed teeth	Mean DMFT
	Caries Free Prim & Perm teeth	Untreated Decay Prim & Perm teeth	Using Tobacco	Dental Fluorosis	Sealants	Sealants 1st Molar	Sealants 2nd molar	Sealants 1st or 2nd Molar		
35 Years:	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
36 Years:	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
37 Years:	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
38 Years:	98.04	0.00	1.96	1.96	0.00	0.00	0.00	0.00	0.00	0.08
39 Years:	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
40 Years:	97.78	2.22	2.22	2.22	0.00	0.00	0.00	0.00	0.00	0.22
41 Years:	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
42 Years:	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
43 Years:	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
44 Years:	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
55 Years:	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00



	with Perio Pockets		Percent of All		with		with		Dental		
	< 4mm	>= 4 and < 6mm	< 3mm	>= 3mm and < 5mm	Diabetes	Need Biopsy	18-20 Teeth	20+ Teeth	No Natural Teeth	Sealed Decay	Lost Caries
35 Years:	0.00	0.00	0.00	0.00	0.00	0.00	100.00	100.00	0.00	0.00	0.00
36 Years:	0.00	0.00	0.00	0.00	0.00	0.00	100.00	100.00	0.00	0.00	0.00
37 Years:	0.00	0.00	0.00	0.00	0.00	0.00	100.00	100.00	0.00	0.00	0.00
38 Years:	1.96	1.96	1.96	1.96	0.00	1.96	100.00	100.00	0.00	0.00	0.00
39 Years:	0.00	0.00	0.00	0.00	0.00	0.00	100.00	100.00	0.00	0.00	0.00
40 Years:	2.22	2.22	2.22	2.22	0.00	2.22	97.78	100.00	0.00	2.22	0.00
41 Years:	0.00	0.00	0.00	0.00	0.00	0.00	100.00	100.00	0.00	0.00	0.00
42 Years:	0.00	0.00	0.00	0.00	0.00	0.00	100.00	100.00	0.00	0.00	0.00
43 Years:	0.00	0.00	0.00	0.00	0.00	0.00	100.00	100.00	0.00	0.00	0.00
44 Years:	0.00	0.00	0.00	0.00	0.00	0.00	100.00	100.00	0.00	0.00	0.00
55 Years:	1.27	1.27	1.27	1.27	0.00	0.00	600.00	600.27	0.00	1.27	0.00



Ages 35-44 Years:

Percent with Highest CPITN of 0,1,2,3,4

CPITN	Percent
4	0.52
3	0.00
2	0.00
1	0.00
0	0.00

Percent with Highest CPITN of 0,1,2,3,4

CPITN	Percent
4	0.15
3	0.00
2	0.00
1	0.00
0	0.00



Age Group 35 - 44 Years and Age Group 55 Years and Older


The data for each of the following statistics is listed by individual ages:

- F. Caries Free** – The percent of patients of each given age without caries. To be considered caries free, a patient cannot have any of the following conditions or codes posted in the Chart:
- **Caries conditions** – 15104, 15105, 15106, or 15107.
 - **Missing teeth conditions** – 15100 or 15101.
 - **Procedure codes** – D2000 to D4276, D4910, D4999, D6000 to D6079, D6100, D6199 to D7259, or D7999.
- G. Untreated Decay** – The percent of patients of each given age with untreated decay. An untreated caries is any caries condition code (15104, 15105, 15106, or 15107) that has not had either a procedure that covers the same surface posted after the caries condition code was posted or has not had the corresponding tooth extracted (an existing, existing other, or missing tooth condition is considered extracted for the purposes of this report). A restoration code on a tooth followed chronologically by an untreated caries condition indicates that the tooth decayed again after it was fixed and is counted as untreated decay.
- H. Using Tobacco** – The percent of patients of each given age (with caries) who are using tobacco (patients who have the condition code “15203 Tobacco Use” posted in the Chart).
- I. Dental Fluorosis** – The percent of patients of each given age (with caries) who have dental fluorosis (patients who have the condition code “15200 Dental Fluorosis” posted in the Chart).
- J. Sealants** – The percent of patients of each given age (with caries) who have dental sealants (i.e. patients who have the sealant code D1351 posted in the Chart).
- K. Mean # of Sealed Teeth** – The total number of sealed teeth for all patients of each given age divided by the number of patients of each given age.
- L. Mean DMFT** – The DMFT for all patients of each given age divided by the number of patients of each given age. A tooth with an untreated caries code that has been fixed later is counted only once.
- M. Perio Pockets** – The percent of patients of each given age with the specified perio pocket measurements.
- N. Loss of Attachment** – The percent of patients of each given age with the specified clinical attachment level.
- O. Diabetes** – The percent of patients of each given age (with perio measurements that appear on this report) who have diabetes (patients who have the condition code “15201 Diabetes” posted in the Chart).
- P. Need Biopsy** – The percent of patients of each given age (with perio measurements that appear on this report) who need biopsies (patients who have the condition code “15202 Needs Biopsy” posted in the Chart).
- Q. All 28 Teeth** – The percent of patients of each given age who have all 28 natural teeth (patients who do not have any Existing, Existing Other, or Completed extractions, other than wisdom teeth, or condition codes “15100 Missing Tooth > 1 year” or “15101 Missing Tooth” posted in the Chart).

- R. 20+ Teeth** – The percent of patients of each given age who have 20 or more natural teeth. A patient has a missing tooth if an extraction, appropriate condition, or appropriate Existing/ Existing Other code is posted in the patient's Chart.
- S. No Natural Teeth** – The percent of patients of each given age who have no natural teeth.
- T. Untreated Decay (Dentate Adults)** – The percent of dentate patients of each given age with untreated decay (patients who do not have both D5110 and D5120 and have untreated decay—any condition code 15104 –15107—posted in the Chart). A restoration code on a tooth followed chronologically by an untreated caries condition indicates that the tooth decayed again after it was fixed and is counted as untreated decay.
- U. Root Caries (Dentate Adults)** – The percent of dentate patients of each given age with root caries (i.e. patients who have the condition code "15104 Deep Dentinal/Cemental Caries" posted in the Chart).
- V. CPITN** – The percent of patients in each age group (ages 35 – 44, and 55 and older) with the highest CPITN of 0, 1, 2, 3, and 4. CPITN is calculated from periodontal exams within the date range of the report:
- Any patients who have a Probing Depth (PD or Pocket Depth) for any tooth higher than 6 mm are counted towards the 4 category and are not counted towards any other category.
 - Any patients who have a Probing Depth (PD or Pocket Depth) for any tooth of 4 - 6 mm are counted towards the 3 category and are not counted towards any other category.
 - Any patients that are marked as having Plaque (i.e. not set to "0 - None") and a Probing Depth (PD or Pocket Depth) for any tooth less than 4 for any tooth are counted towards the 2 category and are not counted towards any other category.
 - Any patients that have bleeding marked for any tooth are counted towards the 1 category and are not counted towards any other category.
 - Any remaining patients should be counted towards the 0 category.

Clinical Notes Report

The Clinical Notes report displays a clinical note for a patient on a specified date.

	<p>Why: To print a patient's clinical notes on a specific day</p> <p>When: As needed</p>
---	--

PATIENT CLINICAL NOTE(ABBOTT, JAMES S) The Allied Dentist Group Billing Types 1 - 254					
Date:	05/13/2018				Page: 1
PATIENT NAME	CHART NUM	SS#	HOME PHONE	WORK PHONE	LAST VISIT
Abbott, James S	ABB101	000-00-0000	555-1586		05/05/2009
CLINICAL NOTES Note Date: 01/28/2018 -----<Wed - Jan 28,2018>-----<10:04:46>----- <ENTERPRISE>-----<Wed - Jan 28,2018>-----<10:05:10>----- <ENTERPRISE>-----[] I have seen and examined the patient with the resident. I have discussed the case with the resident.[] I agree with the diagnosis and treatment plan as documented in the resident's note.[] Straight forward[] Low Complexity[] Moderate Complexity[] High Complexity[] Greater than 50% of the visit was spent counseling the patient and discussing the treatment plan.-----<Wed - Jan 28,2018>-----<11:21:09>----- <ENTERPRISE>-----<Wed - Jan 28,2018>-----<11:21:50>----- <ENTERPRISE>-----					



How do I run the Clinical Notes Report?



In the Family File, Patient Chart, or Ledger, from the **File** menu, click **Clinical Notes**, and then click the Print button; or in DXOne Reporting, select **Lists**, and then double-click **Clinical Notes**. For more detailed instructions on how to generate this report, see the “Clinical Notes Report” and “Printing clinical notes” topics of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

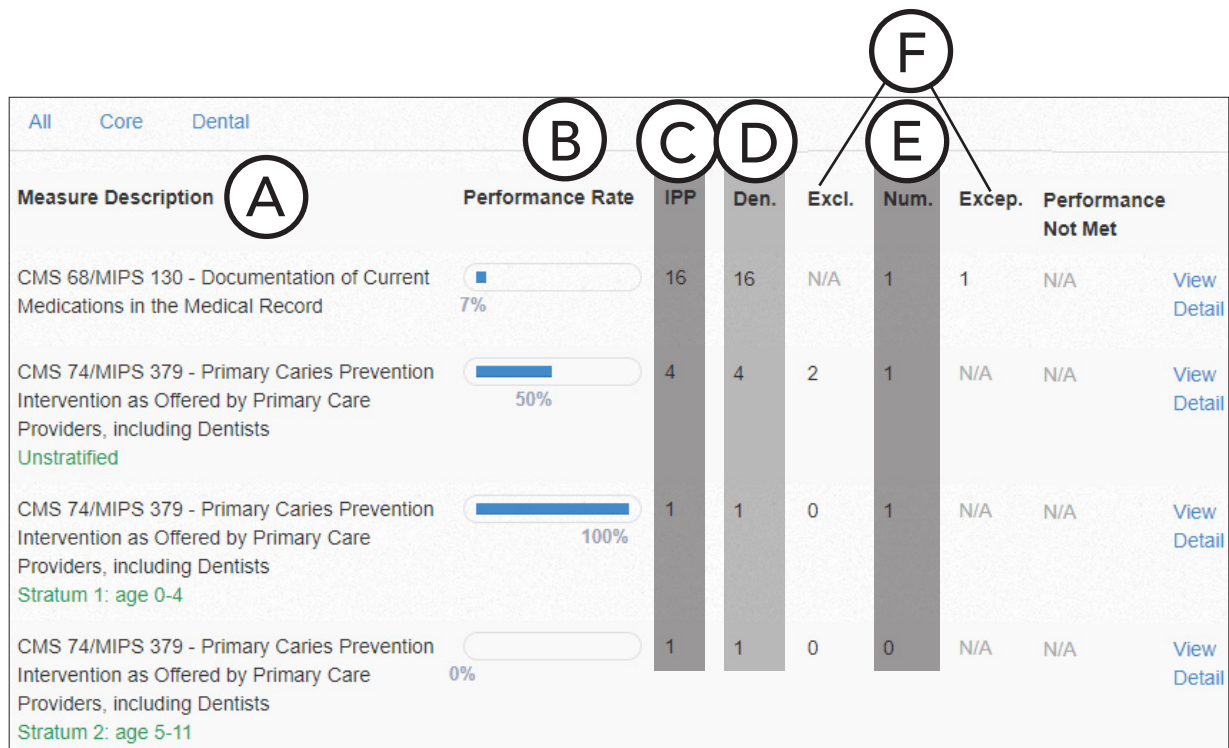
What important information does this report provide?

- A. Patient Details** – The patient’s name, chart number, Social Security number, home and work phone numbers, and last visit date.
- B. Note Details** – The creation date and text of the clinical note.

Clinical Quality Measures List

The Clinical Quality Measures List displays each Meaningful Use measure, the corresponding results (the population, the denominator and numerator used for calculating the actual percentage for a result, exclusions, and exceptions), and the details of the requirement for that measure.

	Why: To view the calculated results of Meaningful Use clinical measures
	When: As needed



How do I run the Clinical Quality Measures List?

In the Office Manager, from the **Analysis** menu, point to **Meaningful Use**, and then click **Clinical Quality Measures**. After opening CQMsolution, click **Create Report**. For additional details about running this report, see the “Clinical Quality Measures List” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The CQM report results include all the measures that were defined for the report.

- A. Measures** – The list of measures.
- B. Results** – The calculated results.
- C. Population** – The patients.
- D. Denominator** – The denominator used in the calculation.
- E. Numerator** – The numerator used in the calculation.
- F. Exclusions and Exceptions** – Exclusions and exceptions that were not taken into account during the calculation.

*Note: To view details of any of the measures in the report, click **View Detail**.*

The following tables explain the calculations and requirements for each measure.

68 Documentation of Current Medications in the Medical Record	
Requirement: Percentage of patient visits for patients aged 18 years and older for which the eligible professional (EP) attests to documenting a list of current medications using all immediate resources available on the date of the encounter. This list must include all known prescriptions, over-the-counter drugs, herbal supplements/medicines, and vitamin/mineral/dietary (nutritional) supplements and must contain the medications’ name, dosage, frequency, and route of administration.	
Exception: Patient is in an urgent or emergent medical situation where time is of the essence and to delay treatment would jeopardize the patient’s health status.	
Initial Patient Population	The number of patients 18 years old or older before the start of the specified Measurement Period who have visits occurring during the 12-month reporting period.
Denominator	The number of patients in the Initial Patient Population.
Numerator	The number of patients (from the Denominator) for whom the EP attests to documenting a list of current medications for those patients.

74 Primary Caries Prevention Intervention as Offered by Primary Care Providers, Including Dentists

Requirement: Percentage of children who are less than 20 years of age and who received a fluoride varnish application during the specified Measurement Period.

Initial Patient Population	The number of children who are less than 20 years old with a visit during the specified Measurement Period. <ul style="list-style-type: none"> • Stratum 1 – Patients 0 to 5 years old. • Stratum 2 – Patients 6 to 12 years old. • Stratum 3 – Patients 13 to 19 years old.
Denominator	The number of patients in the Initial Patient Population.
Numerator	The number of patients (from the Denominator) who receive a “Fluoride Varnish” (a procedure posted from the Chart with the appropriate CDT code).

75 Children Who Have Dental Decay or Cavities

Requirement: Percentage of children who are less than 20 years old who have tooth decay or cavities during the specified Measurement Period.

Initial Patient Population	The number of children who are less than 20 years old with a visit during the specified Measurement Period.
Denominator	The number of patients in the Initial Patient Population.
Numerator	The number of patients (from the Denominator) who have “Tooth Decay” or “Cavities” (a condition/diagnosis with the appropriate ICD-9-CM code).

138 Preventive Care and Screening: Tobacco Use: Screening and Cessation Intervention

Requirement: Percentage of patients aged 18 years or older who were screened for tobacco use one or more times within 24 months and who received cessation counseling intervention if identified as a tobacco user.

Exception: Documentation of medical reason(s) for not screening for tobacco use (for example, limited life expectancy or other medical reason).

Initial Patient Population	All patients aged 18 years old or older.
Denominator	The number of patients in the Initial Patient Population.
Numerator	The number of patients (from the Denominator) who have been identified as a “Tobacco User” (a patient with the appropriate SNOMED-CT code) or “Non-Tobacco User” (a patient with the appropriate SNOMED-CT code) within 24 months of a patient’s health assessment or medical encounter being entered within the specified Measurement Period.

156 Use of High-risk Medications in the Elderly

Requirement: Percentage of patients 66 years of age or older who were ordered high-risk medications.

Initial Patient Population	Patients 66 years old or older who had a visit during the specified Measurement Period.
Denominator	The number of patients in the Initial Patient Population.
Numerator 1	Patients with an order for at least one "High-risk Medication" (a prescription with the appropriate RxNorm code) during the specified Measurement Period.
Numerator 2	Patients with an order for at least two different "High-risk Medications" (prescriptions with the appropriate RxNorm codes) during the specified Measurement Period.

165 Controlling High Blood Pressure

Requirement: The percentage of patients 18-85 years of age who had a diagnosis of hypertension and whose BP was adequately controlled during the measurement year.

Initial Patient Population	The number of patients who were 18 years old or older and less than or equal to 85 years old before the beginning of the specified Measurement Period.
Denominator	The number of patients in the Initial Patient Population who were diagnosed with "Hypertension" (a medical alert with the appropriate ICD-9-CM or SNOMED-CT code) up to 6 months after the specified Measurement Period and who have an "Encounter Outpatient" (a patient health assessment or medical encounter with the appropriate AMA-CPT code) with one of the selected Providers within the specified Measurement Period and who do not have one of the following: <ul style="list-style-type: none"> • Evidence of end stage renal disease (ESRD) (an "active" medical alert with the appropriate ICD-9-CM or SNOMED-CT code). • One or more procedures, such as dialysis or a renal transplant, that were performed for ESRD (a procedure posted from the Chart with the appropriate AMA-CPT code). • Active diagnosis of "Pregnancy" (an "active" medical alert with the appropriate ICD-9-CM or SNOMED-CT code). • "Encounter Pregnancy" (a medical encounter with the appropriate ICD-9-CM code).
Numerator	The number of patients (from the Denominator) who have had a diastolic blood pressure reading less than 90 mmHg and a systolic blood pressure reading greater than 140 mmHg during the most recent patient health assessment with one of the selected Providers within the specified Measurement Period.

Collections Manager List

The Collections Manager List is a highly customizable report that lists guarantors with outstanding balances.



Why: To identify guarantors with outstanding balances so they can be targeted for collections

When: Monthly

Collection Manager List										
PMTS - DENTRIX DENTAL SYSTEMS										
Date: 12/31/2017										Page: 1
GUAR NAME	BALANCE	0->30	31->60	61->90	91->	PA REM	TO INS	INS EST		
GUAR EST	LAST PMT	PMT AMT	AMT DUE	#	PRV OJ	PRV TYPE	REMINDER	REM TYPE		
NOTE										
Abbott,James T	117.42	3.42	0.00	0.00	114.00	N/A	0.00	0.00		
117.42		0.00	0.00	0						
James is divorced from Cathy Davis and is the primary insurance provider for their three children.										
Brown,Mary T	144.20	4.20	0.00	0.00	140.00	N/A	0.00	0.00		
144.20		0.00	0.00	0						
Crosby,Brent O	3799.60	1564.60	0.00	0.00	2235.00	2363.60	895.00	785.00		
3014.60	12/29/2017	125.00	0.00	0						
Davis,Janet D	66.96	1.96	0.00	0.00	65.00	N/A	0.00	0.00		
66.96		0.00	0.00	0						
Edwards,John G	1115.00	0.00	0.00	0.00	1115.00	1115.00	0.00	0.00		
1115.00		0.00	129.90	1						
Farrer,Lisa	66.96	1.96	0.00	0.00	65.00	N/A	0.00	0.00		
66.96		0.00	0.00	0						
Gleason,Gary F	786.00	86.00	0.00	0.00	700.00	N/A	0.00	0.00		
786.00	11/18/2017	65.00	0.00	0						
Hayes,Sally	204.62	133.12	0.00	0.00	71.50	N/A	65.00	58.50		
146.12	11/18/2017	0.00	0.00	0						
Perkins,Shelly A.	66.96	1.96	0.00	0.00	65.00	N/A	0.00	0.00		
66.96		0.00	0.00	0						
Smith,Michael	66.96	1.96	0.00	0.00	65.00	N/A	0.00	0.00		
66.96		0.00	0.00	0						
Winters,CElise	133.90	3.90	0.00	0.00	130.00	N/A	0.00	0.00		
133.90		0.00	0.00	0						
TOTALS:										
BALANCE	0->30	31->60	61->90	91->	PA REM	TO INS	INS EST	GUAR EST	PMT AMT	AMT DUE #
6568.58	1803.08	0.00	0.00	4765.50	3478.60	960.00	843.50	5725.08	190.00	129.90 1

How do I run the Collections Manager List?

1. From the Collections Manager, click **View Setup** on the menu bar to open the **Collections Manager View** dialog box.

2. Configure the view filters as needed.
3. Click **Show Columns** to open the **Show Columns** dialog box.

4. Add/remove the data you want included/excluded on the report in the **Show these columns in this order** list box.
5. Click **OK** to save the settings and close the **Show Columns** dialog box.
6. Click **OK** to save the settings and close the **Collections Manager View** dialog box.
7. From the **Print** menu, click **Collections Manager List**.

8. Click **Yes** to run the report.

For additional details about running this report, see the “Printing the Collections Manager List” topic in the Collections Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Guarantor Details – The information displayed in this section is highly customizable and depends on the settings configured in step 4 of the How do I run this report? section. The following is a comprehensive list of the possible data:



- **# Pmts Missed**
- **0-30 Balance**
- **31-60 Balance**
- **61-90 Balance**
- **>91 Balance**
- **Account Clinic**
- **Account Provider**
- **Acct Balance**
- **Amt Billed to Ins**
- **Best Time to Call**
- **Billing Type**
- **Birthday & Age**
- **Chart #**
- **Email Address**
- **Family Position**
- **Future Rem. Type**
- **Future Reminder Date**
- **Guarantor City**
- **Guarantor Estimate**
- **Guarantor Name**
- **Guarantor State**
- **Guarantor Zip Code**
- **Home Phone**
- **Insurance Estimate**
- **Last Payment Amount**
- **Last Payment Date**
- **Last Statement Date**
- **PA Amount Due**
- **PA Rem Balance**
- **Prev Office Journal Entry**
- **Prev OJ Entry Type**
- **Soc Sec #**
- **Suspended Credit**
- **Work Phone & Ext**

B. Guarantor Notes – If you select **Include Guarantor Account Notes** when setting options for this report, guarantor notes appear on the report.

C. Report Totals – Combined totals for all guarantors.

Continuing Care Cards - No Appointment

The Continuing Care Cards - No Appointment letter merge generates continuing care reminder cards for patients who have continuing care attached in the Family File but are not scheduled for a continuing care appointment.

	<p>Why: To generate continuing care reminder cards</p> <p>When: Monthly</p>	
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Dental Practice

1234 Oak St
Suite 500
American Fork, UT 84003
(801) 555-1234

Dear Brent

This is just to remind you that it's time for your next dental examination! Please call us at your convenience to schedule an appointment. Your last exam was February 5, 2017. We look forward to hearing from you soon.

Brent Crosby
123 Actor Lane
Beverly Hills, CA 90210



How do I run the Continuing Care Cards - No Appointment?

1. From the Office Manager, click **Letters** on the menu bar to open the **Letters** dialog box.
2. Click **Continuing Care** to open the **Continuing Care Letters** dialog box.
3. Select **Continuing Care - W/O Appt**, and click **Create/Merge** to open the **Create/Merge Options** dialog box.
4. Select **Create Data File and Merge Letters**, and click **OK** to create the reminder cards.

For additional details about running this report, see the "Creating cards for patients without appointments" topic in the Office Manager portion of the Dentrax Enterprise Help (from the **Help** menu of any module, click **Contents**).

Continuing Care Cards - with Appointment

The Continuing Care Cards - with Appointment letter merge creates reminder cards for patients who have a continuing care appointments scheduled.

	<p>Why: To generate continuing care reminder cards</p> <p>When: Monthly</p>	
---	---	---

Dental Practice
1234 Oak St
Suite 500
American Fork, UT 84003
(801) 555-1234

Dear James

This is to remind you that it is time for your Perio Maint. You have scheduled an appointment on Friday, February 22, 2018 at 8:00am. Please call us today if you need to re-schedule. We look forward to seeing you soon.

James Abbott
123 Oak St
Murray, UT 84123


How do I run the Continuing Care Cards - with Appointment?

1. From the Office Manager, click **Letters** on the menu bar to open the **Letters** dialog box.
2. Click **Continuing Care** to open the **Continuing Care Letters** dialog box.
3. Select **Continuing Care - With Appt**, and click **Create/Merge** to open the **Create/Merge Options** dialog box.
4. Select **Create Data File and Merge Letters**, and click **OK** to create the reminder cards.

For additional details about running this report, see the "Creating appointment reminder cards" topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

Continuing Care Display List

The Continuing Care Display list displays continuing care appointments based on the continuing care views set up in the Appointment Book.

	<p>Why: To view continuing care appointments</p> <p>When: Monthly or as needed</p>
---	--

CONTINUING CARE DISPLAY LIST											
The Dentist Group											
Date: 03/23/2018										Page: 1	
DATE	TYPE	APPOINTMENT	STATUS	PRIOR TREAT.	NAME H PHONE W PHONE	AGE	PROV.	INSURANCE CARRIER CLINIC	0-30 61-90	31-60 90 ->	SUS. CR. BALANCE
05/15/2018	PROPHY	03/28/2011+		11/11/2017	*Davis, Karen 555-1530	65	Prov1 DRAPER	Acme Benefits	Assoc 0.00	0.00	0.00 1924.80
09/02/2018	PROPHY	+	6M		Crosby, Jill (743)555-2381	30	Prov2 CENTRAL	Allied Group	Insurance Trust 0.00	0.00	0.00 0.00
10/23/2018	Pmt Promis	03/28/2011+		11/11/2016	*Crosby, Brent (743)555-2381 (743)555-4900	64	Prov1 DRAPER	Allied Group	Insurance Trust 0.00	0.00	0.00 0.00
11/11/2018	PROPHY	03/28/2011+		11/11/2017	Edwards, Anna 555-7101	57	Prov1 DRAPER	Utah Acme	Insurance Plan 0.00	0.00	0.00 21.00
11/11/2018	PROPHY	03/28/2011+			*Edwards, John 555-7101	61	Prov1 DRAPER	Utah Acme	Insurance Plan 0.00	0.00	0.00 21.00
11/28/2018	PROPHY	03/28/2011+	6M	11/11/2017	Davis, Harmon 555-3452	68	Prov2 DRAPER	Utah Acme	Insurance Plan 0.00	0.00	0.00 1924.80
11/28/2018	PERIO	+		11/11/2017	*Davis, Karen 555-1530	65	Prov1 DRAPER	Acme Benefits	Assoc 0.00	0.00	0.00 1924.80
A	B	C	D	E							F

How do I run the Continuing Care Display List?

1. From any module, click the Continuing Care button to open the Continuing Care window.
2. From the **View** menu, click a continuing care view.
3. From the **File** menu, click **Print** to print the continuing care view.

For additional details about running this report, see the "Printing from Continuing Care" topic in the Other Features portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The following information (with the exception of letter F) is found in the **Edit Continuing Care** dialog box, which can be accessed by double-clicking the Continuing Care block in the Family File and then double-clicking a continuing care type.

- A. Date** – The continuing care due date.
- B. Type** – The continuing care type.
- C. Appointment** – The date of the patient's scheduled continuing care appointment (if one exists).
- D. Status** – The appointment status.
- E. Prior Treatment** – The date of the patient's last posted procedure.
- F. Aged Balance** – The patient's account balances.

The screenshot shows the 'Edit Continuing Care' dialog box for patient 'Abbott, James S'. The fields are as follows:

- Type:** PROPHY (labeled B)
- Description:** Periodic cleaning and x-rays
- Date Set:** 01/18/2018
- Scheduled Appt.:** 04/22/2018 (labeled C)
- Motivational Note:** Come in for your cleaning and receive a free tooth whitening treatment.
- Due Date:** 07/21/2018 (labeled A)
- Prior Treatment:** 01/20/2018 (labeled E)
- Status:** 1: 6M 6 Month Recall (labeled D)
- Provider:** Prov2 (selected)
- Default Appt. Time:** Time? [checked] 5 Unit(s) Set Time...

Coupon Book - Future Due Payments

The Future Due Payments coupon book creates a payment slip for each payment a patient will make during a payment plan.

\$	Why: To provide your patients with a packet of payment slips customized for their future due payment plan
	When: After creating a future due payment plan and as needed

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><th style="text-align: left;">PAYMENT NUMBER</th></tr> <tr><td style="text-align: center;">1 of 15</td></tr> <tr><th style="text-align: left;">AMOUNT PAID</th></tr> <tr><td> </td></tr> <tr><th style="text-align: left;">CHECK NO.</th></tr> <tr><td> </td></tr> <tr><th style="text-align: left;">DATE PAID</th></tr> <tr><td> </td></tr> <tr><th style="text-align: left;">BALANCE DUE</th></tr> <tr><td style="text-align: center;">1174.26</td></tr> </table>	PAYMENT NUMBER	1 of 15	AMOUNT PAID		CHECK NO.		DATE PAID		BALANCE DUE	1174.26	<p>REMIT TO: PMTS - DENTRIX DENTAL SYSTEMS 123 E. Valley Dr. Suite 500 American Fork, UT 84003 (801)555-9300</p> <p>PATIENT: Kirk O Baber 11 Maple Leaf Ln. Colmar, PA 18915</p> <p>CHANGE OF ADDRESS: _____ _____</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><th style="text-align: left;">PAYMENT NUMBER</th></tr> <tr><td style="text-align: center;">1 of 15</td></tr> <tr><th style="text-align: left;">AMOUNT DUE</th></tr> <tr><td style="text-align: center;">76.74</td></tr> <tr><th style="text-align: left;">DATE DUE</th></tr> <tr><td style="text-align: center;">12/30/2017</td></tr> </table> <p>Chart: BA0001 Soc.Sec:000-00-0000</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><th style="text-align: left;">AMOUNT ENCLOSED</th></tr> <tr><td> </td></tr> </table>	PAYMENT NUMBER	1 of 15	AMOUNT DUE	76.74	DATE DUE	12/30/2017	AMOUNT ENCLOSED	
PAYMENT NUMBER																				
1 of 15																				
AMOUNT PAID																				
CHECK NO.																				
DATE PAID																				
BALANCE DUE																				
1174.26																				
PAYMENT NUMBER																				
1 of 15																				
AMOUNT DUE																				
76.74																				
DATE DUE																				
12/30/2017																				
AMOUNT ENCLOSED																				

PLEASE RETURN THIS PORTION WITH YOUR PAYMENT
INSTALLMENT PLAN COUPON

How do I run the Coupon Book - Future Due Payments?

1. In the Ledger, from the **Transaction** menu, click **Process Future Due Payment Plan** to open the **Payment Plan** dialog box.
2. Enter the payment plan details.
3. Select the **Print Payment Book** check box.
4. Click **OK** to open the **Payment Book** dialog box.
5. Set print options, and click **Send to Batch** or **Print** to generate the Future Due Payments coupon book.

For additional details about running this report, see the "Creating future due patient plans" topic in the Ledger portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

Coupon Book - Payment Agreements

The Payment Agreement coupon book creates a payment slip for each payment a patient will make throughout the course of a payment agreement.

\$	<p>Why: To provide your patients with a packet of payment slips customized for their payment agreement</p> <p>When: After creating a payment agreement, and as needed</p>
-----------	---

PAYMENT NUMBER
1 of 51
AMOUNT PAID
CHECK NO.
DATE PAID
BALANCE DUE
2501.55

INSTALLMENT PLAN COUPON

PLEASE RETURN THIS PORTION WITH YOUR PAYMENT

REMIT TO:
 PMTS - DENTRIX DENTAL SYSTEMS
 123 E. Valley Dr.
 Suite 500
 American Fork, UT 84003

(801)555-9300

ACCOUNT:
 Kirk Baber
 11 Pine Tree Ln.
 Colmar, PA 18915
 (919)555-3664

CHANGE OF ADDRESS:

PAYMENT NUMBER
1 of 51
AMOUNT DUE
71.48
DATE DUE
12/01/2017

Chart: BA0001
 Soc.Sec: 000-00-0000

AMOUNT ENCLOSED

How do I run the Coupon Book - Payment Agreements?

1. From the Ledger, click the **Payment Agreement** button to open the **Billing/Payment Agreement Information** dialog box.
2. Enter the payment agreement details.
3. Click **Print** to open the **Print for Payment Agreement** dialog box.
4. Select **Coupon Book for Scheduled Payments**, and click **Send to Batch** or **Print** to generate the Payment Agreement coupon book.

For additional details about running this report, see the "Printing payment agreement documents" in the Ledger portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

Credit Card Transaction Report

The Credit Card Transaction Report displays a list of transactions that were processed using the integration of Axia (the third-party provider of the credit card processing service) with Dentrix Enterprise.



Why: To review the credit card transactions that were processed through Axia, and to ensure transaction totals balance out over a variety of reports

When: Daily and as needed

Credit Card Transaction									
1/1/2017 - 12/23/2017 Transaction Date									
Operators: <ALL>									
Billing Types: <ALL>									
Report Date: 12/23/2017			Report Generated By: enterprise				Page 1 of 1		
Transaction Date	Cardholder Name	Terminal Name	Pmt Type	Card Type	Pmt Status	Transaction ID	Operator	BT	Amount
04/07/2017 12:39 pm		Keele's Terminal	Charge	Visa	Processed	2017-04-07,12:39:00,1003,2	DSMITH	13	10.00
04/07/2017 12:47 pm		Keele's Terminal	Credit		Void	2017-04-07,12:47:15,1004,2	DSMITH	13	-10.00
04/07/2017 2:51 pm		Keele's Terminal	Charge	Visa	Processed	2017-04-07,14:51:01,1006,2	DSMITH	13	10.00
3 ITEMS								TOTAL:	10.00

A

B

How do I run the Credit Card Transaction Report?

From the DXOne Reporting module, select **Management**, and then double-click **Credit Card Transaction**. For additional details about running this report, see the “Credit Card Transaction Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Transaction** – For each transaction on the report, the following information appears: date and time, cardholder’s name, terminal name, payment type (such as charge or credit), card type (such as VISA or MasterCard), payment status (such as processed or void), transaction ID, logged-in user who posted it, billing type of patient’s family, and amount of transaction (positive or negative).
- B. Totals** – The total number of transactions on the report and the sum of those transactions

Custom Practice Information Report

The Custom Practice Information Report displays customizable information entered during Dentrix Enterprise setup (for example, billing types and payment types).

Why: To ensure custom practice information has been entered properly

When: After Dentrix Enterprise setup and as needed

CUSTOM PRACTICE INFORMATION																					
The Dentist Group																					
Date:	04/22/2018																				
Page: 1																					
A	<table border="1"> <thead> <tr> <th>ID</th> <th>BILLING TYPE</th> </tr> </thead> <tbody> <tr><td>1</td><td>Standard Billing - finance charges</td></tr> <tr><td>2</td><td>Standard Billing - no finance charges</td></tr> <tr><td>3</td><td>Insurance Family - delay finance charges</td></tr> <tr><td>4</td><td>Insurance Family - finance charges</td></tr> <tr><td>5</td><td>Payment Plan - finance charges</td></tr> <tr><td>6</td><td>Payment Plan - no finance charges</td></tr> <tr><td>7</td><td>No Statement and No Finance Charges</td></tr> <tr><td>8</td><td>Bad Debt - at risk</td></tr> <tr><td>9</td><td>Bad Debt - to collections</td></tr> </tbody> </table>	ID	BILLING TYPE	1	Standard Billing - finance charges	2	Standard Billing - no finance charges	3	Insurance Family - delay finance charges	4	Insurance Family - finance charges	5	Payment Plan - finance charges	6	Payment Plan - no finance charges	7	No Statement and No Finance Charges	8	Bad Debt - at risk	9	Bad Debt - to collections
ID	BILLING TYPE																				
1	Standard Billing - finance charges																				
2	Standard Billing - no finance charges																				
3	Insurance Family - delay finance charges																				
4	Insurance Family - finance charges																				
5	Payment Plan - finance charges																				
6	Payment Plan - no finance charges																				
7	No Statement and No Finance Charges																				
8	Bad Debt - at risk																				
9	Bad Debt - to collections																				
B	<table border="1"> <thead> <tr> <th>PAYMENT TYPES</th> </tr> </thead> <tbody> <tr><td>Check Payment - Thank You</td></tr> <tr><td>Cash Payment - Thank You</td></tr> <tr><td>Credit Card Payment - Thank You</td></tr> </tbody> </table>	PAYMENT TYPES	Check Payment - Thank You	Cash Payment - Thank You	Credit Card Payment - Thank You																
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CUSTOM NOTES																					
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Patient has excellent dental hygiene																					
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E	APPOINTMENT STATUS TYPES xAPTSET Appointment Set 2FIRM Appointment Confirmed xLMTape Left message on tape xLMpers Left message w/person xLMwrk Left message at work xNOansw No answer xEMER Emergency appt xCANC Cancelled xMISSED Missed Appointment
F	APPOINTMENT CHECK LIST DESCRIPTIONS Appointment Verified Personal Information Insurance Coverage Referred By Consent Form Signed Follow Up? Cont. Care Set Other Family Appts Next Appointment

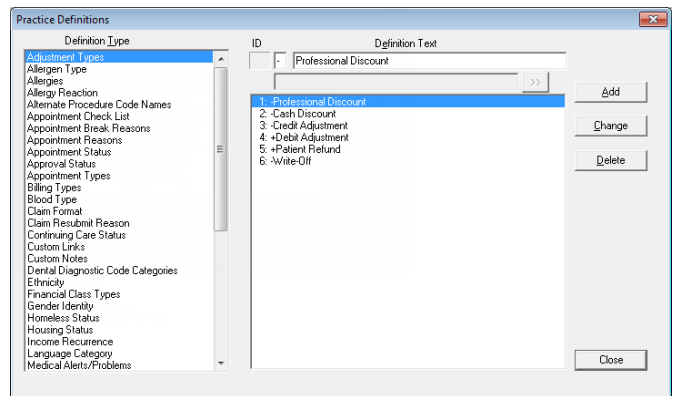
How do I run the Custom Practice Information Report?

In the Office Manager, from the **Reports** menu, point to **Reference**, and then click **Custom Practice Information**.

What important information does this report provide?



The following report information is found in the **Practice Definitions** dialog box, which can be accessed in the Office Manager. See the topics for "Practice Definitions" in the Office Manager portion of the Dentrix Enterprise Help for details about how to edit this information.

- A. Billing Types
- B. Payment Types
- C. Adjustment Types
- D. Custom Notes
- E. Appointment Status Types
- F. Appointment Check List Descriptions



Daily Appointment List (DX1)

The Daily Appointment List displays the practice's daily appointments. The report displays details of each appointment and corresponding patient information. Also, you can specify how appointments on the report are sorted.

	Why: To assist with appointment confirmation phone calls, to use as a quick reference list for the current day's patients
	When: Daily

Server Name: <Default>

Daily Appointment List

Date Range: 04/11/2019 - 04/11/2019
 Clinics: <ALL>
 Providers: <ALL>
 Appointment Providers: <ALL>
 Operatories: <ALL>
 Sorted By: Appt Date/Time

Report Date: 4/10/2019 Report Generated By: ENTERPRISE Page 1 of 1

Date	Time	Status	Patient Name	PROV/OP	Appointment Reason	Length	Phone
04-11-2019	08:00am	NOansw	Abbott, Patricia	TTRAN/AF-02	2BWX, ProphyAd	60m	(801) 555-1586
04-11-2019	08:10am	NOansw	Cox, Sara	DSMITH/AF-01	ExtSingTh#1, ExtEchAdd#32	60m	
04-11-2019	08:40am	LMpers	Abbott, James S	DSMITH/AF-03	FluoridCh	50m	(801) 555-1586
04-11-2019	09:00am	NOansw	Larson, Jennifer	AMCCLURE/AF-01	ProphyAd	60m	
04-11-2019	09:20am	NOansw	Smith, Donald L	DSMITH/AF-04	Consult	50m	(046) 555-6919
04-11-2019	10:00am	NOansw	Winters, Carl	MHAYES/AF-01	Amalg3Per#5	40m	
04-11-2019	11:10am	FIRM	Smith, Albert C	MHAYES/AF-03	Silicate#1	50m	(942) 555-4952
04-11-2019	01:00pm	NOansw	Abbott, Patricia S	TTRAN/AF-02	PeriodicX	70m	(919) 555-1069

(A)
(B)
(C)
(D)
(E)
(F)

How do I run the Daily Appointment List (DX1)?

From the DXOne Reporting module, select **List**, and then double-click **Daily Appointment List**. For additional details about running this report, see the “Daily Appointment List” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The appointments on the report can be sorted by one of the various primary sort options available (appointment date and time, appointment status, patient name, appointment provider name, or operatory name) and then by a secondary sort option (if specified). Each clinic’s appointments can start on a new page.

- A. Time - The appointment start time.**
- B. Status - The appointment status (whether the appointment has been confirmed or not).**
- C. Patient Name - The patient for whom the appointment has been scheduled.**
- D. Prov/Op - The provider and operatory assigned to the appointment.**
- E. Appointment Reason - The procedures to be performed.**
- F. Phone - The patient’s phone number.**

Daily Appointment List Report

The Daily Appointment List Report displays the practice's daily appointments. Appointments are sorted by appointment date and time.



Why: To assist with appointment confirmation phone calls, to use as a quick reference list for the current day's patients



When: Daily

DAILY APPOINTMENT LIST

The Dentist Group
 Providers <ALL> - <ALL>
 Operatories <ALL> - <ALL>
 Sorted By: Appt Date/Time, Operatory Name
 04/24/2018 - 04/24/2018

Date: 04/23/2018

Page: 1

DATE	TIME	STATUS	PATIENT NAME	PROV/OP	APPT. REASON	LENGTH	PHONE
04/24/2018	10:00am	<CMPL>	Abbott, James S	DDS1/DEF_OP1	CCAdult, ProphyAd	110m	()555-1586
04/24/2018	11:00am	<CMPL>	Little, Brian R	DDS1/DEF_OP2	ResCmP2s#15	10m	()
04/24/2018	11:00am	<CMPL>	Taylor, Mark	DDS1/DEF_OP3	Sealant#15, Sealant#1	30m	()
04/24/2018	11:40am	<CMPL>	Abbott, Patricia	DDS2/DEF_OP1	ExtErpTh#16, ExtErpT	50m	()555-1586
04/24/2018	11:40am	NOansw	Brown, Mary	DDS1/DEF_OP2	ExtEval	10m	()555-1586
04/24/2018	1:00pm	NOansw	Johnson, Rachelle	DDS1/DEF_OP1	ProphyAd	60m	(801)555-5266
04/24/2018	1:10pm	NOansw	Crosby, Brent	DDS1/DEF_OP2	NutriCnsl	10m	()555-1586
04/24/2018	1:00pm	NOansw	Crosby, Shirley	DDS01/DEF_OP3	2BWV, LwParMtBs#2	50m	()555-1586
04/24/2018	2:20pm	NOansw	Little, Carol	DDS1/DEF_OP2	ExtEval	40m	()
04/24/2018	3:00pm	NOansw	Edwards, John S	DDS1/DEF_OP1	4BWV	10m	()555-1586
04/24/2018	3:50pm	NOansw	Edwards, Anna	DDS1/DEF_OP2	FabPtCr+B#5	90m	()555-1586
04/24/2018	5:00pm	<CMPL>	Farrer, Lisa	DDS1/DEF_OP1	CCAdult, Pano, FabPt	80m	()375-1586



How do I run the Daily Appointment List Report?




In the Office Manager, from the **Reports** menu, point to **Lists**, and then click **Daily Appointment List**. Ensure the **Daily Appointment List** option is selected, and click **OK**. For additional details about running this report, see the “Daily Appointment List” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Time** – The appointment start time.
- B. Status** – The appointment status (whether the appointment has been confirmed or not).
- C. Patient Name** – The patient for whom the appointment has been scheduled.
- D. Prov/Op** – The provider and operatory assigned to the appointment.
- E. Appointment Reason** – The procedures to be performed.
- F. Phone** – The patient’s phone number.

Daily Summary Report

The Daily Summary Report displays statistics for new guarantors, new patients, total patients seen, appointments made, production, collections, and adjustments.

  	Why: To generate a report of patient, appointment, and financial statistics to monitor daily activity
	When: Daily

Daily Summary		
9/20/2017 - 9/20/2017 Entry Date		
Clinics: <ALL>		
Billing Types: <ALL>		
Payment Types: <ALL>		
Adjustment Types: <ALL>		
Report Date:	Report Generated By: DSMITH	Page 1 of 1
<div style="display: flex; flex-direction: column; align-items: center;"> <div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin-bottom: 5px;">A</div> <div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin-bottom: 5px;">B</div> <div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin-bottom: 5px;">C</div> <div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin-bottom: 5px;">D</div> <div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center;">E</div> </div>	New Guarantors (New families in Family File) 4 New Patients (New patients in Family File) 10 Total Patients Seen 24 New Appointments 12 Charges from Procedures 9105.00	
	Patient Payments	
	Amex	100.00
	Care Credit	3256.00
	Cash Payment	250.00
	Check Payment	120.00
	Credit Card Payment	964.00
	Discover	60.00
	Insurance Payment	4960.00
	Master Card	620.00
	Visa	758.00
	Total:	11088.00
	Adjustments	
	Credit	2150.00
	Debit	100.00
	Total:	21600.00

How do I run the Daily Summary Report?

From the DXOne Reporting module, select **Management**, and then double-click **Daily Summary**. For additional details about running this report, see the “Daily Summary Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report can be grouped by clinic. The following information can be used to monitor daily activity:

- A. New Guarantors** – The number of new families that were created in the Family File.
- B. New Patients** – The number of new patients that were created in the Family File.
- C. Total Patients Seen** – The number of patients who had procedures completed.
- D. New Appointments** – The total number of appointments made. An appointment is counted if it was newly created, rescheduled from the unscheduled list, or moved from another day. An appointment with multiple changes is counted only once.
- E. Charges from Procedures** – The total amount of charges. This does not include adjustments, finance charges, or late charges.
- F. Patient Payments** – For each payment type, the total amount posted. The total amount of all payment types also appears.
- G. Adjustments** – For each adjustment type, the total amount posted. The total amount of all adjustment types also appears.

Day Sheet (Adjustments) Report

The Adjustments Day Sheet report lists credit adjustments, charge adjustments, finance charges, and late charges that have been posted to the Ledger.

Why: To print a record of adjustments each day, to review adjustment totals for a date or date range, and to ensure adjustment totals balance out over a variety of reports

When: Daily

Adjustment Day Sheet

04/22/2018 - 04/22/2018 Procedure Date
 Clinics: <ALL>
 Providers: <ALL>
 Billing Type: <ALL>
 Adjustment Types: <ALL>

Report Date: 04/22/2018 Report Generated By: enterprise Page 1 of 1

Entry Date	Proc Date	Patient Name	Chart	BT	Provider	Clinic	Operator ID	Amount
+Debit Adjustment								
04/22/2018	04/22/2018	Abbott, Patricia <Family>	ABB102	2	DDS1	CENTRAL	ENTERPRISE	10.00
QUANTITY: 1			AVERAGE: 10.00			TOTAL: 10.00		
Charge								
04/22/2018	04/22/2018	Abbott, Patricia <Family>	ABB102	2	DDS1	CENTRAL	ENTERPRISE	21.00
QUANTITY: 1			AVERAGE: 21.00			TOTAL: 21.00		
-Professional Discount								
04/22/2018	04/22/2018	Abbott, Patricia <Family>	ABB102	2	DDS1	CENTRAL	ENTERPRISE	-10.00
04/22/2018	04/22/2018	Crosby, Brent <Family>	CRO987	1	DDS1	CENTRAL	ENTERPRISE	-10.00
QUANTITY: 2			AVERAGE: -10.00			TOTAL: -20.00		
Grand Totals								
			Quantity			Amount	Average	
Total Credit Adjustments			2			-20.00	-10.00	
Total Debit Adjustments			1			10.00	10.00	
Total Finance Charges			0			0.00	0.00	
Total Late Charges			1			21.00	21.00	
Totals			4			11.00	2.75	

Provider: DDS1

Clinic: CENTRAL

+Debit Adjustment								
04/22/2018	04/22/2018	Abbott, Patricia <Family>	ABB102	2	DDS1	CENTRAL	ENTERPRISE	10.00
QUANTITY: 1			AVERAGE: 10.00			TOTAL: 10.00		
Late Charge								
04/22/2018	04/22/2018	Abbott, Patricia <Family>	ABB102	2	DDS1	CENTRAL	ENTERPRISE	21.00
QUANTITY: 1			AVERAGE: 21.00			TOTAL: 21.00		
-Professional Discount								
04/22/2018	04/22/2018	Larson, Bill <Family>		1	DDS1	CENTRAL	ENTERPRISE	-10.00
QUANTITY: 1			AVERAGE: -10.00			TOTAL: -10.00		
QUANTITY: 3			AVERAGE: 7.00			CLINIC TOTAL: 21.00		
QUANTITY: 3			AVERAGE: 7.00			PROVIDER TOTAL: 21.00		

E

Clinic: CENTRAL							
Provider: DDS1							
+Debit Adjustment							
04/22/2018	04/22/2018	Abbott, Patricia <Family>	ABB102	2	DDS1	CENTRAL	ENTERPRISE 10.00
QUANTITY: 1			AVERAGE: 10.00		TOTAL: 10.00		
Late Charge							
04/22/2018	04/22/2018	Abbott, Patricia <Family>	ABB102	2	DDS1	CENTRAL	ENTERPRISE 21.00
QUANTITY: 1			AVERAGE: 21.00		TOTAL: 21.00		
-Professional Discount							
04/22/2018	04/22/2018	Larson, Bill <Family>		1	DDS1	CENTRAL	ENTERPRISE -10.00
QUANTITY: 1			AVERAGE: -10.00		TOTAL: -10.00		
QUANTITY: 3			AVERAGE: 7.00		PROVIDER TOTAL: 21.00		
Provider: DDS2							
-Professional Discount							
04/22/2018	04/22/2018	Abbott, Patricia <Family>	ABB102	2	DDS2	CENTRAL	ENTERPRISE -10.00
QUANTITY: 1			AVERAGE: -10.00		TOTAL: -10.00		
QUANTITY: 1			AVERAGE: -10.00		PROVIDER TOTAL: -10.00		
QUANTITY: 4			AVERAGE: 2.75		CLINIC TOTAL: 11.00		

How do I run the Day Sheet (Adjustments) Report?

From the DXOne Reporting module, select **Management**, and then double-click **Day Sheet - Adjustments**. For additional details about running this report, see the "Day sheet - adjustments" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report can be grouped and subtotaled by provider with a breakdown by clinic. Or, the report can be grouped and subtotaled by clinic with a breakdown by provider. The following information can be used to monitor adjustments for each provider and/or clinic:

A. Adjustments – The adjustments (grouped and totaled by type) posted to the Ledger.

B. Adjustment Details – Each adjustment provides the following information:

- **Entry Date** – The date an adjustment is posted to the Ledger.
- **Procedure Date** – The backdated or postdated date of an adjustment. (This date is usually the same as the entry date.)

Note: It is essential that you understand the difference between Entry Dates and Procedure Dates. For details on these dates, see the Frequent Problems to Understanding Dentrix Enterprise Reports section in the Introduction of this book.

- **Amount** – The amount of the adjustment.

C. Grand Totals – The following information appears in the Grand Totals section:

- **Credit Adjustments** – The quantity, total amount, and average amount of the credit adjustments.
- **Debit Adjustments** – The quantity, total amount, and average amount of the debit adjustments.
- **Finance Charges** – The quantity, total amount, and average amount of the finance charges.



- **Late Charges** – The quantity, total amount, and average amount of the late charges.
- **Totals** – The quantity, total amount, and average amount of all adjustments.

D. Provider Totals – The adjustments are shown for the provider with a breakdown of the adjustments for each clinic the provider works in. Each clinic's adjustments for that provider are subtotaled. The adjustment totals for the provider appear below the clinic subtotals.

E. Clinic Totals – The adjustments are shown for the clinic with a breakdown of the adjustments by each provider at that clinic. Each provider's adjustments for that clinic are subtotaled. The adjustment totals for the clinic appear below the provider subtotals.

Day Sheet (Charges and Receipts) Report

The Day Sheet (Charges and Receipts) report lists financial transactions (charges, payments, credit adjustments, and charge adjustments) that have been posted to the Ledger.

Why: To print a record of transactions each day, to review transactions and production totals for a date or date range, and to ensure transaction totals balance out over a variety of reports

When: Daily

DAY SHEET (CHRONOLOGICAL)											
Date:		04/22/2018		04/22/2018				Providers <ALL> - <ALL>		Page: 1	
ENTRY DATE	PROCEDURE DATE	PATIENT NAME	TH	CODE	DESCRIPTION	CHARGES	PMTS.	BT	PROV	PHONE #	
04/22/2018	04/22/2018	Abbott, James S	5	D6970	Post/core + brdg retainer, fabr	230.00		2	DDS1	()555-1586	
04/22/2018	04/22/2018	Abbott, James S		D1110	Prophylaxis-adult	0.00		2	DDS1	()555-1586	
04/22/2018	04/22/2018	Abbott, James S		D0120	Periodic oral evaluation	0.00		2	DDS1	()555-1586	
04/22/2018	04/22/2018	Abbott, James S		D0274	Bitewings-four films	0.00		2	DDS1	()555-1586	
04/22/2018	04/22/2018	Abbott, James S		D0330	Panoramic film	0.00		2	DDS1	()555-1586	
04/22/2018	04/22/2018	Abbott, Patricia <Fa			-Professional Discount		-10.00	2	DDS2	()555-1586	
04/22/2018	04/22/2018	Abbott, Patricia <Fa			+Debit Adjustment	10.00		2	DDS1	()555-1586	
04/22/2018	04/22/2018	Abbott, Patricia <Fa			Check Payment - Thank You		-125.00	2	<MPL>	()555-1586	

GRAND TOTALS:				
	CURRENT	MONTH-TO-DATE	YEAR-TO-DATE	PREVIOUS MONTH
CHARGES:	230.00	230.00	5902.00	0.00
COMPARED TO OFFICE:	393.00			
NET DIFFERENCE:	163.00			
APPLIED PAYMENTS:	-125.00	-125.00	-709.00	0.00
SUSPENDED PAYMENTS:	250.00	250.00	1418.00	0.00
APPLIED CREDIT ADJUSTMENTS:	-10.00	-10.00	-10.00	0.00
SUSPENDED CREDIT ADJUSTMENTS:	20.00	20.00	20.00	0.00
CHARGE ADJUSTMENTS:	10.00	10.00	10.00	0.00
FINANCE CHARGES:	0.00	0.00	22.00	0.00
LATE CHARGES:	21.00	21.00	21.00	0.00
CHARGES BILLED TO INSURANCE:	0.00	0.00	1964.00	0.00
NEW PATIENTS:	0	0	0	0
PATIENTS SEEN:	1	1	1	0
AVG PROD PER PATIENT:	230.00	230.00	230.00	230.00
AVG CHG PER PROCEDURE:	46.00	46.00	46.00	46.00
PREVIOUS BALANCE	168146.34			
BALANCE AS OF 04/22/2018	168272.34			
NET CHANGE	126.00			

SMITH, DENNIS D - DDS1 TOTALS:				
	CURRENT	MONTH-TO-DATE	YEAR-TO-DATE	PREVIOUS MONTH
CHARGES:	230.00	230.00	460.00	0.00
COMPARED TO OFFICE:	393.00			
NET DIFFERENCE:	163.00			
APPLIED PAYMENTS:	0.00	0.00	-7.00	0.00
APPLIED CREDIT ADJUSTMENTS:	0.00	0.00	0.00	0.00
CHARGE ADJUSTMENTS:	10.00	10.00	10.00	0.00
FINANCE CHARGES:	0.00	0.00	22.00	0.00
LATE CHARGES:	21.00	21.00	21.00	0.00
CHARGES BILLED TO INSURANCE:	0.00	0.00	0.00	0.00
NEW PATIENTS:	0	0	0	0
PATIENTS SEEN:	1	1	1	0
AVG PROD PER PATIENT:	230.00	230.00	230.00	230.00
AVG CHG PER PROCEDURE:	46.00	46.00	46.00	46.00
PREVIOUS BALANCE	616707.30			
BALANCE AS OF 04/22/2018	616968.30			
NET CHANGE	261.00			

How do I run the Day Sheet (Charges and Receipts) Report?

In the Office Manager, from the **Reports** menu, point to **Management**, and then click **Day Sheet (Charges and Receipts)**. For additional details about running this report, see the “Day sheet (charges and receipts)” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Transactions – The transactions posted to the Ledger. Transaction can be sorted by running one of the following report options:

Note: Each of the following options prints as a separate report to the Batch Processor.

- **Chronological Day Sheet** – Lists all transactions in the order they were posted (the most recent transactions appear at the top of the report).
- **Alphabetical Day Sheet** – Lists all transactions alphabetically by the patients’ last name.

B. Transaction Details – Each transaction provides the following information:

- **Entry Date** – The date a transaction is posted to the Ledger.
- **Procedure Date** – The date a procedure is posted to the Chart.

Note: It is essential that you understand the difference between Entry Dates and Procedure Dates. For details on these dates, see the Frequent Problems to Understanding Dentrix Enterprise Reports section in the Introduction of this book.

- **TH** – The tooth number(s) associated with a procedure.
- **BT** – Billing type.

C. Grand Totals Information (Default) – Regardless of the report options you select, the following information appears in the Grand Totals section:

- **Charges Billed to Insurance** – The total amount billed to insurance.
- **Average Prod Per Patient** – The average value of procedures per patient (the total charged for procedures divided by the total number of patients seen).
- **Average Chg Per Procedure** – The average charge per procedure (the total charged for procedures divided by the total number of procedures performed).

D. Fee Schedule Details – If you select **Compare to Fee Schedule** when setting options for this report, you can compare the actual total of charges with the estimated total, had all charges been applied using the selected fee schedule.

- **Compared to [Fee Schedule]** – The estimated total of charge,s had all procedures been billed using the selected fee schedule.
- **Net Difference** – The difference between the actual total and the estimated total. A negative value indicates that the practice would have lost revenue, had all procedures been billed using the selected fee schedule. A positive value indicates the office would have increased revenue.

E. MTD and YTD Totals – If you select **Include MTD and YTD Totals** when setting options for this report, the month-to-date and year-to-date totals appear on the report. You can use these totals to ensure the practice is on track to meet its production goals for the month and year. You can also use these totals to compare the current production levels with the previous month.

Note: MTD and YTD totals only appear when running the report by Entry Date.

F. Extended MTD Totals – If you select **Include Extended MTD Totals** when setting options for this report, the Avg Prod Per Patient and Avg Chg Per Procedure appears in the Month-to-date column. The Extended MTD Totals help you determine whether the current day's production average is higher or lower than the current month's average.

G. Provider Totals – If you select **Include Provider Totals** when setting options for this report, the transaction totals for each provider appear on the report. Providers can use this information to monitor their daily production.

Day Sheet (Receipts) Report

The Receipts Day Sheet report lists receipts by payment type.

\$

Why: To print a record of receipts each day, to review receipt totals for a date or date range, and to ensure receipt totals balance out over a variety of reports

When: Daily

Receipts Day Sheet								
04/22/2018 - 04/22/2018 Procedure Date								
Clinics: <ALL>								
Providers: <ALL>								
Billing Type: <ALL>								
Payment Types: <ALL>								
Report Date: 04/22/2018			Report Generated By: enterprise			Page 1 of 1		
Entry Date	Proc Date	Patient Name	Chart	BT	Provider	Clinic	Operator ID	Amount
Check Payment - Thank You								
04/22/2018	04/22/2018	Abbott, Patricia <Family>	ABB102	2	<MULTIPLE>	CENTRAL	ENTERPRISE	-7.20
04/22/2018	04/22/2018	Crosby, Brent <Family>		1	DDS1	CENTRAL	ENTERPRISE	-108.00
QUANTITY: 2			AVERAGE: -74.00			TOTAL: -115.20		
Grand Totals								
QUANTITY: 2			AVERAGE: -74.00			TOTAL: -148.00		

Provider: DDS1								
Clinic: CENTRAL								
Check Payment - Thank You								
04/22/2018	04/22/2018	Larson, Bill <Family>		1	DDS1	CENTRAL	ENTERPRISE	-23.00
QUANTITY: 1			AVERAGE: -23.00			TOTAL: -23.00		
QUANTITY: 1			AVERAGE: -23.00			CLINIC TOTAL: -23.00		
QUANTITY: 1			AVERAGE: -23.00			PROVIDER TOTAL: -23.00		

Clinic: CENTRAL								
Provider: DDS1								
Check Payment - Thank You								
04/22/2018	04/22/2018	Larson, Bill <Family>		1	DDS1	CENTRAL	ENTERPRISE	-23.00
QUANTITY: 1			AVERAGE: -23.00			TOTAL: -23.00		
QUANTITY: 1			AVERAGE: -23.00			PROVIDER TOTAL: -23.00		
Provider: DDS2								
Check Payment - Thank You								
04/22/2018	04/22/2018	Abbott, Patricia <Family>	ABB102	2	DDS2	CENTRAL	ENTERPRISE	-7.20
QUANTITY: 1			AVERAGE: -7.20			TOTAL: -7.20		
QUANTITY: 1			AVERAGE: -7.20			PROVIDER TOTAL: -7.20		
QUANTITY: 2			AVERAGE: -15.10			CLINIC TOTAL: -30.20		

Initial Provider: DSMITH									
Provider: DESMITH									
Visa									
04/20/2015	04/20/2015	Winters, Carl	WI211	1	DESMITH	AF	DESMITH		-72.80
QUANTITY: 1			AVERAGE: -72.80			TOTAL: -72.80			
QUANTITY: 1			AVERAGE: -72.80			PROVIDER TOTAL: -72.80			
Provider: DSMITH									
Check Payment - Thank You									
04/20/2015	04/20/2015	Crosby, Brent <Family>	CR93	1	DESMITH	AF	DESMITH		-38.00
QUANTITY: 1			AVERAGE: -38.00			TOTAL: -38.00			
Primary Dental Insurance Check Payment									
04/20/2015	04/20/2015	Crosby, Brent	CR93	1	DESMITH	0	DESMITH		-168.00
QUANTITY: 1			AVERAGE: -168.00			TOTAL: -168.00			
Visa									
04/20/2015	04/20/2015	Crosby, Brent <Family>	CR93	1	DESMITH	CENTRAL	DESMITH		-42.00
QUANTITY: 1			AVERAGE: -42.00			TOTAL: -42.00			
QUANTITY: 3			AVERAGE: -82.67			PROVIDER TOTAL: -248.00			
									INITIAL PROVIDER TOTAL: -320.80

How do I run the Day Sheet (Receipts) Report?

From the DXOne Reporting module, select **Management**, and then double-click **Day Sheet - Receipts**. For additional details about running this report, see the "Day sheet - receipts" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report can be grouped and subtotaled by provider with a breakdown by clinic. The report can be grouped and subtotaled by clinic with a breakdown by provider. The report can be grouped and subtotaled by initial provider with a breakdown by rendering provider. The following information can be used to monitor receipts for each provider, clinic, and initial provider.

- A. Receipts** – The receipts (grouped and totaled by payment type) posted to the Ledger.
- B. Receipt Details** – Each receipt provides the following information:
 - **Procedure Date** – The date of a payment posted to the Ledger.
 - **Provider** – The provider of procedures that a payment was applied to.
 - **Clinic** – The rendering or collecting clinic (depending on the selected option for the report).
 - **Amount** – The amount of the payment.
- C. Grand Total** – The grand total of receipts listed.
- D. Provider Totals** – The receipts are shown for the provider with a breakdown of the receipts for each clinic the provider works in. Each clinic's receipts for that provider are subtotaled. The receipts totals for the provider appear below the clinic subtotals.
- E. Clinic Totals** – The receipts are shown for the clinic with a breakdown of the receipts by each provider at that clinic. Each provider's receipts for that clinic are subtotaled. The receipts totals for the clinic appear below the provider subtotals.
- F. Initial Provider Totals** – The receipts are shown for the initial provider with a breakdown of the receipts by each rendering provider. Each rendering provider's receipts are subtotaled. The receipts totals for the initial provider appear below the rendering provider subtotals.

Day Sheet Report

The Day Sheet report lists financial transactions (charges, payments, credit adjustments, charge adjustments, finance charges, and late charges) that have been posted to the Ledger.

\$

Why: To print a record of transactions each day, to review transactions and production totals for a date or date range, and to ensure transaction totals balance out over a variety of reports

When: Daily

Alphabetical Day Sheet

04/22/2018 - 04/22/2018 Entry Date
Clinics: <ALL>
Providers: <ALL>
Billing Type: <ALL>

Report Date: 04/22/2018 Report Generated By: enterprise Page 1 of 1

Entry Date	Proc Date	Patient Name	Description	Charges	Credits	BT	Prov	Clinic	Phone
04/22/2018	04/22/2018	Abbott, James S	D6970 : 5 : Post/core + brdg retainer, fabr	230.00		2	DDS1	CENTRAL	555-1586
04/22/2018	04/22/2018	Abbott, James S	D1110 : 0 : Prophylaxis-adult	0.00		2	DDS1	CENTRAL	555-1586
04/22/2018	04/22/2018	Abbott, James S	D0120 : 0 : Periodic oral evaluation	0.00		2	DDS1	CENTRAL	555-1586
04/22/2018	04/22/2018	Abbott, James S	D0274 : 0 : Bitewings-four films	0.00		2	DDS1	CENTRAL	555-1586
04/22/2018	04/22/2018	Abbott, James S	D0330 : 0 : Panoramic film	0.00		2	DDS1	CENTRAL	555-1586
04/22/2018	04/22/2018	Abbott, Patricia <Family>	-Professional Discount		-10.00	2	DDS2	CENTRAL	555-1586
04/22/2018	04/22/2018	Abbott, Patricia <Family>	Check Payment - Thank You		-125.00	2	<MULTIPLE>	CENTRAL	555-1586
04/22/2018	04/22/2018	Abbott, Patricia <Family>	+Debit Adjustment	10.00		2	DDS1	CENTRAL	555-1586
04/22/2018	04/22/2018	Larson, Bill	D2150 : 12(OD) : Amalgam-2 surf. prim/perm	156.00		1	DDS1	CENTRAL	
04/22/2018	04/22/2018	Larson, Bill <Family>	-Professional Discount		-10.00	1	DDS1	CENTRAL	
04/22/2018	04/22/2018	Larson, Bill <Family>	Check Payment - Thank You		-23.00	1	DDS1	CENTRAL	

GRAND TOTALS

Charges:	386.00	Applied Payments:	-148.00	Patients Seen:	2
Charge Adjustments:	10.00	Suspended Payments:	0.00	New Patients:	0
Finance Charges:	0.00	Applied Ins Payments:	0.00	Avg Prod Per Patient:	193.00
Late Charges:	21.00	Suspended Ins Payments:	0.00	Avg Chg Per Proc:	64.33
Debit Special Adj:	0.00	Applied Credit Adj:	-20.00	OTH Applied Payments:	0.00
Debit Initial Balances:	0.00	Suspended Credit Adj:	0.00	OTH Applied Ins Payments:	0.00
Billed to Insurance:	0.00	Credit Special Adj:	0.00	OTH Applied Credit Adj:	0.00
Previous Balance:	17,388.04	Credit Initial Balances:	0.00	OTH Applied Credit Special Adj:	0.00
Balance as of 04/22/2009	17,637.04			OTH Applied Credit Initial Bal:	0.00
Net Change:	249.00				

D

Provider: DDS01

Clinic: CENTRAL

04/22/2018	04/22/2018	Smith, Brandon	D1110 : 0: Prophylaxis-adult	48.00	1	DDS01	CENTRAL
04/22/2018	04/22/2018	Smith, Brandon	D0120 : 0: Periodic oral evaluation	25.00	1	DDS01	CENTRAL
04/22/2018	04/22/2018	Smith, Brandon	D0274 : 0: Bitewings-four films	32.00	1	DDS01	CENTRAL

Clinic: CENTRAL

Provider: DDS01

TOTALS

Provider: DDS01

Clinic: CENTRAL

Charges:	105.00	Applied Payments:	0.00	Patients Seen:	1
Charge Adj:	0.00	Applied Ins Payments:	0.00	New Patients:	1
Finance Charges:	0.00	Applied Credit Adj:	0.00	Avg Prod Per Patient:	105.00
Late Charges:	0.00	Credit Special Adj:	0.00	Avg Chg Per Proc:	35.00
Debit Special Adj:	0.00	Credit Initial Balances:	0.00		
Debit Initial Balances:	0.00				
Billed to Insurance:	105.00				
Previous Balance:	70.00				
Balance as of 04/22/2018	175.00				
Net Change:	105.00				

Provider: DDS01

Charges:	105.00	Applied Payments:	0.00	Patients Seen:	1
Charge Adj:	0.00	Applied Ins Payments:	0.00	New Patients:	1
Finance Charges:	0.00	Applied Credit Adj:	0.00	Avg Prod Per Patient:	105.00
Late Charges:	0.00	Credit Special Adj:	0.00	Avg Chg Per Proc:	35.00
Debit Special Adj:	0.00	Credit Initial Balances:	0.00		
Debit Initial Balances:	0.00				
Billed to Insurance:	105.00				
Previous Balance:	70.00				
Balance as of 04/22/2018	175.00				
Net Change:	105.00				

Clinic: CENTRAL

Prov: DDS01

04/22/2018	04/22/2018	Smith, Brandon	D1110 : 0: Prophylaxis-adult	48.00	1	DDS01	CENTRAL
04/22/2018	04/22/2018	Smith, Brandon	D0120 : 0: Periodic oral evaluation	25.00	1	DDS01	CENTRAL
04/22/2018	04/22/2018	Smith, Brandon	D0274 : 0: Bitewings-four films	32.00	1	DDS01	CENTRAL

Prov: DDS01

Clinic: CENTRAL

TOTALS

Clinic: CENTRAL

Prov: DDS01

Charges:	105.00	Applied Payments:	0.00	Patients Seen:	1
Charge Adj:	0.00	Applied Ins Payments:	0.00	New Patients:	1
Finance Charges:	0.00	Applied Credit Adj:	0.00	Avg Prod Per Patient:	105.00
Late Charges:	0.00	Credit Special Adj:	0.00	Avg Chg Per Proc:	35.00
Debit Special Adj:	0.00	Credit Initial Balances:	0.00		
Debit Initial Balances:	0.00				
Billed to Insurance:	105.00				
Previous Balance:	70.00				
Balance as of 04/22/2018	175.00				
Net Change:	105.00				

SUSPENDED CREDITS

Charges:	0.00	Applied Payments:	0.00	Patients Seen:	0
Charge Adj:	0.00	Applied Ins Payments:	0.00	New Patients:	0
Finance Charges:	0.00	Applied Credit Adj:	0.00	Avg Prod Per Patient:	0.00
Late Charges:	0.00	Credit Special Adj:	0.00	Avg Chg Per Proc:	0.00
Debit Special Adj:	0.00	Credit Initial Balances:	0.00		
Debit Initial Balances:	0.00				
Billed to Insurance:	0.00				
Previous Balance:	0.00				
Balance as of 04/22/2018	0.00				
Net Change:	0.00				

Clinic: CENTRAL

Charges:	105.00	Applied Payments:	0.00	Patients Seen:	1
Charge Adj:	0.00	Applied Ins Payments:	0.00	New Patients:	1
Finance Charges:	0.00	Applied Credit Adj:	0.00	Avg Prod Per Patient:	105.00
Late Charges:	0.00	Credit Special Adj:	0.00	Avg Chg Per Proc:	35.00
Debit Special Adj:	0.00	Credit Initial Balances:	0.00		
Debit Initial Balances:	0.00				
Billed to Insurance:	105.00				
Previous Balance:	70.00				
Balance as of 04/22/2018	175.00				
Net Change:	105.00				



How do I run the Day Sheet Report?

From the DXOne Reporting module, select **Management**, and then double-click **Day Sheet**. For additional details about running this report, see the “Day sheet” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report can be grouped and subtotaled by provider with a breakdown by clinic. Or, the report can be grouped and subtotaled by clinic with a breakdown by provider. The following information can be used to monitor production for each provider and/or clinic:

A. Transactions – The transactions posted to the Ledger.

B. Transaction Details – Each transaction provides the following information:

- **Entry Date** – The date a transaction is posted to the Ledger.
- **Procedure Date** – The date a procedure is posted to the Chart.

Note: It is essential that you understand the difference between Entry Dates and Procedure Dates. For details on these dates, see the Frequent Problems to Understanding Dentrix Reports section in the Introduction of this book.

- **Patient Name** – The patient’s name.
- **Description** – The ADA code and description, or transaction description.
- **Charges or Credits** – Any charges or credits.
- **Clinic** – The clinic where the transaction was posted.
- **Phone** – The patient’s phone number.
- **BT** – Billing type.

C. Grand Totals – The following information appears in the Grand Totals section:


- **Charges and Adjustments** – The total amounts billed to insurance, charged to patients, and adjusted on an account.
- **Balances** – The balance prior to the date of the day sheet, the balance for the date of the day sheet, and the net change between the two balances.
- **Payments** – The total amounts of payments received from insurance and patients or adjusted on an account.
- **Average Prod Per Patient** – The average value of procedures per patient (the total charged for procedures divided by the total number of patients seen).
- **Average Chg Per Procedure** – The average charge per procedure (the total charged for procedures divided by the total number of procedures performed).

D. Provider Totals – The transactions are shown for the provider with a breakdown of the procedures for each clinic the provider works in. Each clinic’s transactions for that provider are subtotaled. The transaction totals for the provider appear below the clinic subtotals.

E. Clinic Totals – The transactions are shown for the clinic with a breakdown of the procedures performed by each provider at that clinic. Each provider’s transactions and suspended credits for that clinic are subtotaled. The transaction totals for the clinic appear below the provider subtotals.

Dental Diagnostic Code List

The Procedure Code List allows you to view and print the dental diagnostic codes entered in Dentrix Enterprise.



Why: To ensure Dentrix Enterprise dental diagnostic codes match current dental diagnostic codes, and to view any custom dental diagnostic codes

When: After Dentrix Enterprise setup, after dental diagnostic codes are updated

DENTAL DIAGNOSTIC CODE LIST			
The Dentist Group			
Date:	04/22/2018		Page: 1
CODE	DESCRIPTION	PAINT TYPE	TREATMENT AREA
01234	Dental Diagnostic Code		Other
D5-10000	Dental Disease NOS		Other
D5-10001	Disease of Teeth NOS		Other
D5-10002	Tooth Disorder NOS		Other
D5-10578	Tooth Sensitivity		Other
D5-22071	Painful Lips		Other
F-51540	Expectoration of bloody sputum		Other
F-51541	Expectoration of hemorr sputum		Other
F-A3610	Facial Nerve Function NOS		Other
T-53120	Dorsal Surface of Tongue		Other
(A)	(B)		(C)

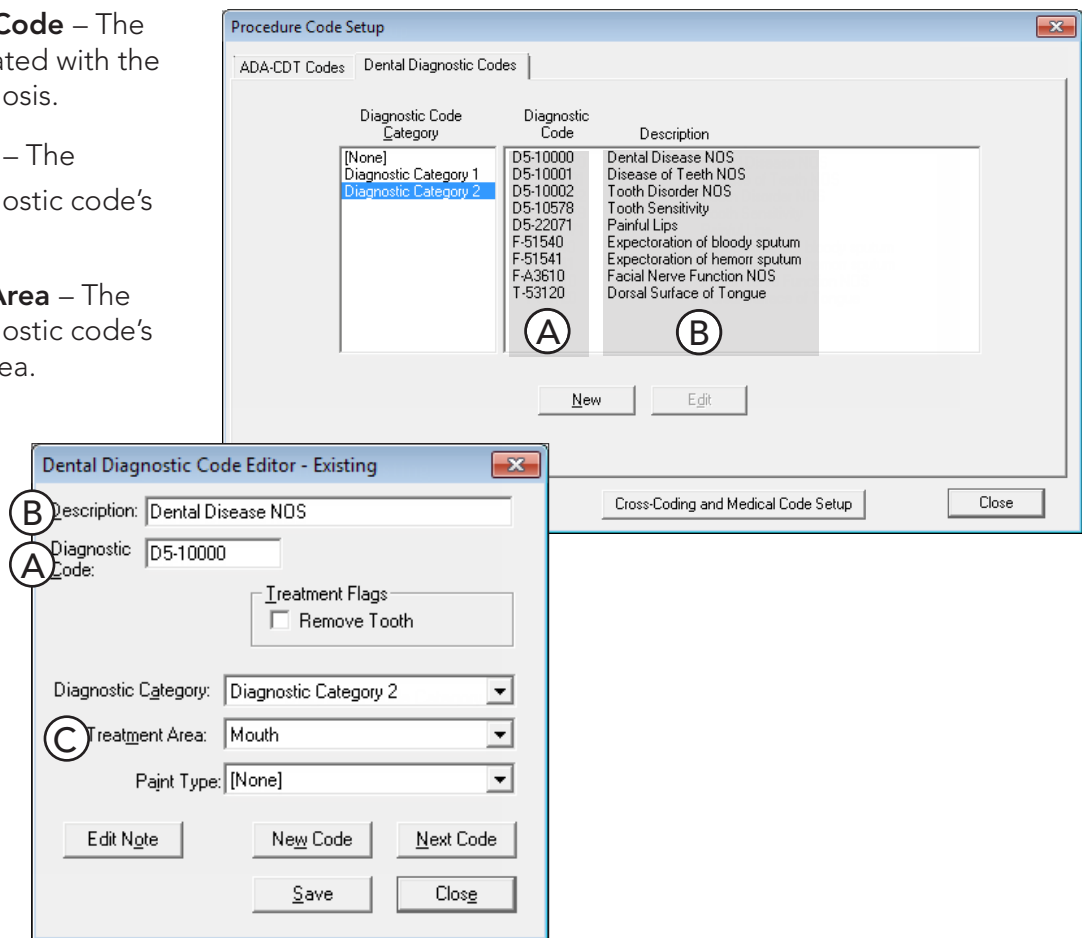
How do I run the Dental Diagnostic Code List?

In the Office Manager, from the **Reports** menu, point to **Reference**, and then click **Diagnostic Code List**. For additional details about running this report, see the “Dental Diagnostic Code List” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The following report information is found in the **Dental Diagnostic Code Editor** dialog box, which can be accessed in the Office Manager. See the “Dental Diagnostic Code Setup” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**) for details on how to edit this information.

- A. Diagnostic Code** – The code associated with the dental diagnosis.
- B. Description** – The dental diagnostic code’s description.
- C. Treatment Area** – The dental diagnostic code’s treatment area.



Dental Encounters Report

The Dental Encounters Report lists procedures posted during a specified date range (each procedure must be attached to a claim to appear on the report), along with the amount that is expected to be paid by insurance.



Why: To submit dental encounters to Medicaid

When: As needed

Dental Encounters

4/11/2018 - 4/12/2018 Entry Date

Clinics: <ALL>

Providers: <ALL>

Carrier Range: <ALL> - <ALL>

Patient Range: <ALL> - <ALL>

Report Date: 4/13/2018

Report Generated By: enterprise

Page 1 of 1

Patient Name	Beneficiary ID	Proc Code	Amount Paid or Expected to be Paid	Date of Service	Group NPI	Rendering NPI
Abbott, James	123456789	D2387	0.00	4/11/2018 12	0	0
Brown, Mary	123456789	D2387	0.00	4/11/2018 12	0	0
Crosby, Brent	123456789	D3310	0.00	4/11/2018 12	0	0
Davis, Harmon	123456789	D2792	0.00	4/11/2018 12	0	0
Farrer, Lisa	123456789	D1205	78.00	4/12/2018 12	0	0
Gleason, Alice	123456789	D5915	365.00	4/12/2018 12	0	0
Smith, Michael	123456789	D3330	189.00	4/12/2018 12	0	0
Winters, Carl	123456789	D3330	85.40	4/12/2018 12	0	0



How do I run the Dental Encounters Report?

From the DXOne Reporting module, select **Management**, and then double-click **Dental Encounters**. For additional details about running this report, see the “Dental Encounters Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Procedures – For each procedure, the date of service, the name of the patient who received treatment, the subscriber ID (Beneficiary ID) of the subscriber of the patient’s insurance plan, and the appropriate NPI numbers are shown.

Deposit Slip

The Deposit Slip allows you to view payments by payment type, and you can use the Deposit Slip to deposit cash and checks at your bank.

\$

Why: To save time by automatically generating deposit slips and to ensure cash, check, and credit card totals match up at the end of each day (in other words, the amount of cash left in the till is correct, each check has been accounted for, and the total charges processed on your credit card machine are correct)

🕒

When: Daily

Deposit Slip

04/22/2018 - 04/29/2018 Procedure Date
Clinics: <ALL>
Operator: <ALL>
Billing Type: <ALL>

Report Date: 04/29/2018

Report Generated By: enterprise

Page 1 of 1

Procedure Date	Name	BT	Provider	Clinic	Bank	Check #	Amount
Cash Payment - Thank You							
04/22/2018	Crosby, Brent L<Family>	2	DDS01	CENTRAL			-20.00
04/22/2018	Little, Brian<Family>	2	<MULTIPLE>	CENTRAL			-100.00
							TOTAL: -120.00
Check Payment - Thank You							
04/22/2018	Abbott, Patricia<Family>	2	DDS01	CENTRAL			-45.00
04/22/2018	Davis, Janet<Family>	1	DDS01	CENTRAL			-23.00
04/23/2018	Winters, Carl<Family>	2	<MULTIPLE>	CENTRAL			-100.00
							TOTAL: -168.00
Dental Insurance Check Payment							
04/27/2018	Metropolitan Life	2	DDS1	CENTRAL		44587	-698.40
							TOTAL: -698.40

TOTAL DEPOSIT: -986.40

PAID IN BY

The Dentist Group
FOR CREDIT OF

43331677-1146
BANK ACCOUNT

E	Operator: ENTERPRISE					
	Clinic: CENTRAL					
	Cash Payment - Thank You					
	04/27/2018	Payne, Mildred<Family>	1	<MULTIPLE>	CENTRAL	-100.00
	1 ITEM					TOTAL: -100.00
	Check Payment - Thank You					
	04/22/2018	Abbott, Patricia<Family>	2	<MULTIPLE>	CENTRAL	-125.00
	04/22/2018	Larson, Bill<Family>	1	DDS1	CENTRAL	-23.00
	04/23/2018	Payne, Mildred<Family>	1	DDS01	CENTRAL	-20.00
	3 ITEMS					TOTAL: -168.00
Dental Insurance Check Payment						
04/27/2018	Metropolitan Life	2	DDS1	CENTRAL	44587 -698.40	
1 ITEM					TOTAL: -698.40	
5 ITEMS					CLINIC TOTAL: -966.40	
					OPERATOR TOTAL: -966.40	

H	Clinic: CENTRAL					
	Operator: ENTERPRISE					
	Cash Payment - Thank You					
	04/27/2018	Payne, Mildred<Family>	1	<MULTIPLE>	CENTRAL	-100.00
	1 ITEM					TOTAL: -100.00
	Check Payment - Thank You					
	04/22/2018	Abbott, Patricia<Family>	2	<MULTIPLE>	CENTRAL	-125.00
	04/22/2018	Larson, Bill<Family>	1	DDS1	CENTRAL	-23.00
	04/23/2018	Payne, Mildred<Family>	1	DDS01	CENTRAL	-20.00
	3 ITEMS					TOTAL: -168.00
Dental Insurance Check Payment						
04/27/2018	Metropolitan Life	2	DDS1	CENTRAL	44587 -698.40	
1 ITEM					TOTAL: -698.40	
5 ITEMS					OPERATOR TOTAL: -966.40	
					CLINIC TOTAL: -966.40	

How do I run the Deposit Slip?

From the DXOne Reporting module, select **Management**, and then double-click **Day Sheet - Deposit Slip**. For additional details about running this report, see the "Day sheet - deposit slip" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The following information can be used to monitor payments for each provider and/or clinic:

- A. Payments** – The payments (grouped and totaled by type) posted to the Ledger.
- B. Payment Details** – Each payment provides the following information:
 - **Procedure Date** – The date of a payment posted to the Ledger.
 - **Amount** – The amount of the payment.

C. Total Deposit – The total of all payment types.

D. Account Information – The following report information (except for the first item) is found in the **Clinic Information** dialog box:

- **Paid in By** – The name of the employee making the deposit.
- **For Credit Of** – The name of the practice for which the deposit is being made.
- **Bank Account** – The practice's bank deposit number.

The image shows two screenshots of the 'Clinic Information - MESA' dialog box. The left screenshot displays the 'General' tab with various fields for clinic identification and contact information. A circled 'D' is placed over the 'Title' field, which contains the text 'The Dental Group'. The right screenshot displays the 'Bank Account' section, which includes fields for 'Administrative Contact', 'Bank Deposit Number', 'Show/Hide/Mask SSN', 'Data Units', 'Fiscal year's beginning month (1-12)', 'Time Zone', 'Billing Statements', and 'Change Provider Completion Options'. A line connects the circled 'D' in the left screenshot to the 'Bank Deposit Number' field in the right screenshot.

E. Operator Payments – The payments for an operator by clinic.

F. Clinic Subtotal – The total for an operator by clinic.

G. Operator Total – The total for an operator.

H. Clinic Payments – The payments for a clinic by operator.

I. Operator Subtotal – The total for a clinic by operator.

J. Clinic Total – The total for a clinic.

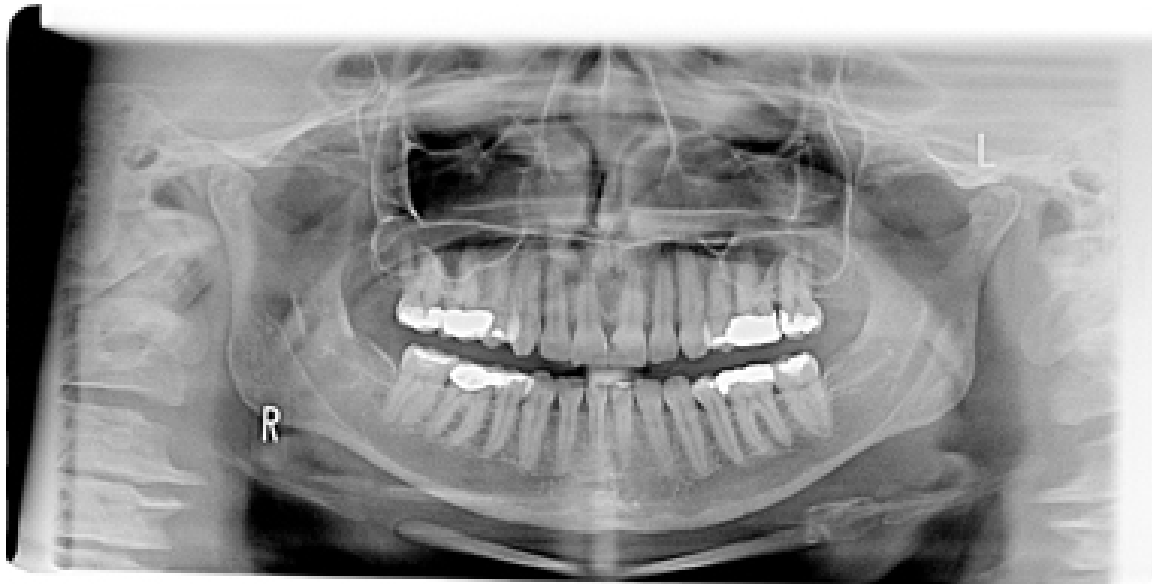
Document Center Document

You can print documents that have been attached to a patient's or provider's Document Center.



Why: To print documents that have been attached to a patient or provider

When: As needed



A 3/1/2018

B [DDS1] Smith, Dennis , D.D.S.

Page: 1

How do I run the Document Center Document?


From a patient's or provider's Document Center, from the **File** menu, point to **Print**, and then click **Print Document(s)**. For additional details about running this report, see the "Printing documents" topic in the Document Center portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Date Attached** – The date the document was attached to the patient, provider, referral, employer, or insurance plan.
- B. Name** – The name of the patient, provider, referral, employer, or insurance plan.

Document Center List

The Document Center List displays the documents that have been attached to patients. This report can be run for a patient or provider.

	Why: To print documents that have been attached to a patient or provider When: As needed
---	---

Document Center

Page: 1

A Date:06/05/2018

Crosby, Brent L [CR0001]

B Correspondence

9/23/2017:Referral Recap ————— **D**

9/23/2017:Referral Gratuity

C

8/5/2017:Anesthesia consent form

8/5/2017:Temporary-Document-Description

8/5/2017:Temporary-Document-Description

8/5/2017:Treatment Plan Follow-up

8/5/2017:Custom Statement

8/5/2017:Appointment Reminder Letter

5/5/2018:Procedure Follow-up

5/5/2018:Five Year Letter

Patient Information

8/5/2017:Medical History

8/5/2017:Insurance Information

Patient Picture

8/5/2017:Updated Picture

X-Rays

8/5/2017:Complete X-Rays

How do I run the Document Center List?


From a patient's or provider's Document Center, from the **File** menu, point to **Print**, and then click **Document Center List**. For additional details about running this report, see the "Printing the Document Center List" topic in the Document Center portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Name** – The name of the patient, provider, referral, employer, or insurance plan.
- B. Document Type** – The document type.
- C. Date Attached** – The date the document was attached.
- D. Document Description** – The document's description. Any notes appear below the description.

Employers and Employed Patients Report

The Employers and Employed Patients Report allows you to view and print the employers entered in Dentrix Enterprise. Depending on how you run the report, the employees associated with each employer may also appear on this report.



Why: To identify individuals whose insurance information needs to be updated when an employer changes insurance carriers

When: As needed

Employers and Employed Patients				
Employers: <ALL> - <ALL>				
Clinics: <ALL>				
Providers: <ALL>				
Report Date: 04/22/2018		Report Generated By: enterprise		Page 1 of 6
(A) Employer Name: A.C.S.				Phone: (408) 555-3000
Address: Division Of Acme Computer Services 1234 LAKESIDE DRIVE Santa Clara, CA 95052				# Employed: 4 (B)
EMPLOYEE	BIRTHDATE	CHART#	FAMILY	SOCIAL SECURITY #
Abbott, Patricia	11/11/1970	ABB123	Single	000-00-0000
Baber, Kirk O	11/11/1970	BAB123	Single	000-00-0000
Gleason, Alice	11/11/1970	GLE123	Single	000-00-0000
Little, Brian	11/11/1970	LIT123	Single	000-00-0000
Employer Name: Acme Insurance Plan				Phone:
Address: 1233 Rodeo Drive Beverly Hills, CA 90210				# Employed: 24
EMPLOYEE	BIRTHDATE	CHART#	FAMILY	SOCIAL SECURITY #
Abbott, James	11/11/1970	ABB123	Single	000-00-0000
Brown, Mary	11/11/1970	BRO123	Single	000-00-0000
Crosby, Brent	11/11/1970	CRO123	Single	000-00-0000
Davis, Janet	11/11/1970	DAV123	Single	000-00-0000
Farrer, Lisa	11/11/1970	FAR123	Single	000-00-0000
Gleason, Alice	11/11/1970	GLE123	Single	000-00-0000
Gleason, Gary	11/11/1970	GLE123	Single	000-00-0000
Hansen, George	11/11/1970	HAN123	Single	000-00-0000
Hayes, Sally	11/11/1970	HAY123	Single	000-00-0000
Jensen, Linda	11/11/1970	JEN123	Single	000-00-0000
Johnson, Rachele	11/11/1970	JOH123	Single	000-00-0000
Jones, John	11/11/1970	JON123	Single	000-00-0000
Keller, Nina	11/11/1970	KEL123	Single	000-00-0000
Little, Brian	11/11/1970	LIT123	Single	000-00-0000
Little, Kevin	11/11/1970	LIT124	Single	000-00-0000
Myers, Henry	11/11/1970	MEY123	Single	000-00-0000
Nelson, Chris	11/11/1970	NEL123	Single	000-00-0000
Olsen, Paul	11/11/1970	OLS123	Single	000-00-0000
Perkins, Allen	11/11/1970	PER123	Single	000-00-0000
Reeves, Elisabeth	11/11/1970	REE123	Single	000-00-0000
Schow, Lawrence	11/11/1970	SCH123	Single	000-00-0000
Taylor, Kerri	11/11/1970	TAY123	Single	000-00-0000
Winters, Carl	11/11/1970	WIN123	Single	000-00-0000
Young, Tina	11/11/1970	YOU123	Single	000-00-0000

How do I run the Employers and Employed Patients Report?

From the DXOne Reporting module, select **Reference**, and then double-click **Employers and Employed Patients**. For additional details about running this report, see the “Employers and Employed Patients Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Employer Details – The name, mailing address, and phone number of the employer. This information is found in the **Employer Information** dialog box, which can be accessed in the Office Manager module. See the “Adding and editing employers” topic in the Office Manager portion of the Dentrix Enterprise Help for details about this information (from the **Help** menu of any module, click **Contents**).

B. Number employed – If you select **Include**

Employees when setting options for this report, the number of patients employed by the employer appears on the report.

C. Employee Details – If you select **Include Employees** when setting options for this report, the name, birth date, chart number, family status, and Social Security number of each patient employed by the employer appears on the report.

Family Ledger Report

The Family Ledger Report displays transactions posted for a family. Depending on report settings, the current balance of each patient in the family is also displayed on the report.

\$	Why: To provide a family with a record of their transactions
	When: As needed

FAMILY LEDGER REPORT						
The Dentist Group						
Date: 04/23/2018					Page: 1	
Guar Name: Peggy Perkins 123 Street Philadelphia, PA 19102				Chart Number:		
				Billing Type: 1		
DATE	TEETH	DESCRIPTION	PATIENT	CHARGE	PAYMENT	BALANCE
04/23/2018		Balance Forward		90.00		90.00
04/23/2018		Finance Charge	Peggy	100.00		190.00
04/23/2018		Late Charge	Peggy	7840.00		8030.00
04/23/2018	8*12	Mand partial-metal base w/sdls	Peggy	452.00		8482.00
04/23/2018	9	Surg place implant: endosteal	Shelly	780.00		9262.00
04/23/2018	4	Crown-porc fuse high noble mtl	Shelly	78.00		9340.00
04/23/2018		Check Payment - Thank You	<Family>		-20.00	9320.00
TOTAL FAMILY BALANCE AS OF 04/23/2011:						9320.00
YTD Finance Charges:						100.00
YTD Late Charges:						7840.00
YTD Payments:						-20.00
YTD Insurance Payments:						0.00

A

B

How do I run the Family Ledger Report?

In the Office Manager, from the **Reports** menu, point to **Ledger**, and then click **Family Ledger Report**. For additional details about running this report, see the "Family Ledger Report" topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Family History** – Displays all financial transactions posted to the Ledger for all family members.
- B. Family Totals** – Displays year-to-date totals for the family.

Family Ledger Report (Single Family)

The Single Family Ledger Report displays transactions posted for a family.

\$	<p>Why: To provide a family with a record of their transactions</p> <p>When: As needed</p>
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SINGLE FAMILY LEDGER						
The Allied Dentist Group						
Date: 05/14/2018				Page: 1		
Guar Name: Peggy Perkins 123 Street Philadelphia, PA 19102				Chart Number:		
				Billing Type: 1		
DATE	TEETH	DESCRIPTION	PATIENT	CHARGE	PAYMENT	BALANCE
04/22/2018		Balance Forward		90.00		90.00
04/23/2018		Finance Charge	Peggy	100.00		190.00
04/23/2018		Late Charge	Peggy	7840.00		8030.00
04/23/2018	8*12	Mand partial-metal base w/sdls	Peggy	452.00		8482.00
04/23/2018	9	Surg place implant: endosteal	Shelly	780.00		9262.00
04/23/2018	4	Crown-porc fuse high noble mtl	Shelly	78.00		9340.00
04/23/2018		Check Payment - Thank You	<Family>		-20.00	9320.00
04/27/2018		Cash Payment - Thank You	<Family>		-100.00	9220.00
05/01/2018	15	Mand partial-metal base w/sdls	Shelly	801.00		10021.00
05/01/2018	9	Extraction crnl remnts-decid th	Shelly	501.00		10522.00
05/05/2018	9	Retainer crn-porc fused-hi nob	Peggy	200.00		10722.00
05/05/2018	12	Retainer crn-porc fused-hi nob	Peggy	200.00		10922.00
05/05/2018	10	Pontic-porcelain fused to hnob	Peggy	200.00		11122.00
05/05/2018	11	Pontic-porcelain fused to hnob	Peggy	200.00		11322.00
TOTAL FAMILY BALANCE AS OF 05/14/2009:						11322.00
YTD Finance Charges:						100.00
YTD Late Charges:						7840.00
YTD Payments:						-120.00
YTD Insurance Payments:						0.00

A

B

How do I run the Family Ledger Report (Single Family)?



In the Ledger, from the **Print** menu, click **Family Ledger**. For additional details about running this report, see the "Family Ledger Report" topic in the Ledger portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Family History** – All financial transactions posted to the Ledger (starting with the specified first transaction date) for all family members.
- B. Family Totals** – Year-to-date totals for the family.

Fee Schedules Report

The Fee Schedules Report lists procedure fees for selected fee schedules. This report also lists the lab expenses and material expenses associated with each procedure.

Why: To ensure each fee schedule is set up properly, to compare multiple fee schedules side by side, and to ensure lab expenses and material expenses are up to date

When: After Dentrix Enterprise setup, and as needed

FEE SCHEDULE								
ADA Code Selection: <ALL>								
Report Date: 04/22/2018			Report Generated By: enterprise			Page 3 of 11		
CODE	DESCRIPTION	Office	PULLEM	DONTIST	DMO	FEE 5	LAB EXPENSE	MATERIAL
D2331	Resin-two surfaces, anterior	90.00	85.00	78.00	74.00	69.00	0.00	25.00
D2332	Resin-three surfaces, anterior	115.00	105.00	95.00	89.00	85.00	0.00	35.00
D2335	Resin-4+ w/incis angle-anterior	150.00	133.00	125.00	115.00	105.00	0.00	70.00
D2336	Compos resin crwn-anterior-prim	170.00	150.00	142.00	125.00	115.00	100.00	150.00
D2380	Resin-1 surface, poster-primary	71.00	65.00	60.00	58.00	55.00	0.00	21.00
D2381	Resin-2 surface, poster-primary	92.00	85.00	79.00	74.00	70.00	0.00	34.00
D2382	Resin-3 surface, poster-primary	119.00	105.00	95.00	88.00	85.00	0.00	84.00
D2385	Resin-1 surface, post-permanent	80.00	75.00	69.00	65.00	61.00	0.00	15.00
D2386	Resin-2 surface, post-permanent	110.00	98.00	92.00	87.00	84.00	0.00	30.00
D2387	Resin-3 surface +, post-perm	146.00	128.00	115.00	106.00	100.00	0.00	86.00
D2390	Resin composite crown, anterior	0.00	0.00	0.00	0.00	0.00	0.00	18.00
D2391	Resin composite-1s, posterior	0.00	0.00	0.00	0.00	0.00	0.00	18.00
D2392	Resin composite-2s, posterior	0.00	0.00	0.00	0.00	0.00	0.00	39.00
D2393	Resin composite-3s, posterior	0.00	0.00	0.00	0.00	0.00	0.00	88.00
D2394	Resin composite-4+s, posterior	0.00	0.00	0.00	0.00	0.00	0.00	121.00
D2410	Gold foil-one surface	331.00	300.00	246.00	225.00	200.00	0.00	0.00
D2420	Gold foil-two surfaces	398.00	390.00	367.00	350.00	338.00	0.00	0.00
D2430	Gold foil-three surfaces	450.00	432.00	393.00	374.00	344.00	0.00	0.00
D2510	Inlay-metallic-one surface	406.00	390.00	375.00	345.00	319.00	0.00	0.00
D2520	Inlay-metallic-two surfaces	468.00	438.00	421.00	395.00	366.00	0.00	0.00
D2530	Inlay-metallic-three + surfaces	520.00	495.00	474.00	440.00	420.00	0.00	0.00
D2542	Onlay-metallic-two surfaces	0.00	0.00	0.00	0.00	0.00	0.00	0.00
D2543	Onlay-metallic-three surfaces	503.00	475.00	428.00	393.00	302.00	0.00	0.00
D2544	Onlay-metallic-four + surfaces	553.00	522.00	470.00	432.00	332.00	0.00	0.00
D2610	Inlay-porcel/ceramic-1 surface	460.00	414.00	393.00	372.00	350.00	0.00	0.00
D2620	Inlay-porcel/ceramic-2 surface	493.00	450.00	440.00	419.00	560.00	0.00	0.00
D2630	Inlay-porcel/ceramic-3+ surface	553.00	500.00	468.00	440.00	445.00	0.00	0.00
D2642	Onlay-porcel/ceram-2 surface	553.00	500.00	468.00	440.00	325.00	0.00	0.00
D2643	Onlay-porcel/ceram-3 surface	583.00	527.00	493.00	464.00	343.00	0.00	0.00
D2644	Onlay-porcel/ceram-4 + surface	608.00	550.00	515.00	484.00	357.00	0.00	0.00
D2650	Inlay-resin based composite-1s	440.00	410.00	388.00	350.00	323.00	0.00	0.00
D2651	Inlay-resin based composite-2s	473.00	435.00	390.00	375.00	359.00	0.00	0.00
D2652	Inlay-resin based composite-3+s	515.00	468.00	450.00	433.00	400.00	0.00	0.00
D2662	Onlay-resin based composite-2s	458.00	440.00	413.00	335.00	227.00	0.00	0.00
D2663	Onlay-resin based composite-3s	488.00	468.00	440.00	357.00	242.00	0.00	0.00
D2664	Onlay-resin based composite-4+s	505.00	485.00	455.00	369.00	250.00	0.00	0.00
D2710	Crown-resin composite(indirect)	395.00	350.00	320.00	287.00	251.00	0.00	0.00
D2712	Crown-3/4 resin-based comp-ind	0.00	0.00	0.00	0.00	0.00	0.00	0.00
D2720	Crown-resin w/high noble metal	542.00	600.00	573.00	499.00	478.00	0.00	0.00
D2721	Crown-resin w/ most base metal	573.00	546.00	493.00	454.00	413.00	0.00	0.00
D2722	Crown-resin with noble metal	630.00	590.00	508.00	463.00	444.00	0.00	0.00
D2740	Crown-porcelain/ceramic substr	630.00	570.00	525.00	500.00	487.00	0.00	0.00
D2750	Crown-porc fuse high noble mtl	613.00	575.00	534.00	500.00	487.00	0.00	0.00
D2751	Crown-porc fused to base metal	563.00	503.00	485.00	465.00	449.00	0.00	0.00
D2752	Crown-porc fused noble metal	590.00	548.00	515.00	495.00	472.00	0.00	0.00



How do I run the Fee Schedules Report?

From the DXOne Reporting module, select **Reference**, and then double-click **Fee Schedule**. For additional details about running this report, see the “Fee Schedule Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The following report information is found in the **Procedure Code Editor** dialog box, which can be accessed in the Office Manager. See the “Procedure Code Setup” or “Auto fee schedule changes” topic in the Office Manager portion of the Dentrix Enterprise Help for details on how to edit this information.

- A. Code** – The procedure code.
- B. Fee** – The fee assigned to a procedure.
- C. Lab Expense** – The estimated lab expense associated with the procedure.
- D. Material** – The estimated materials expense for the procedure.

The screenshot shows the 'Procedure Code Editor - Existing' dialog box. The 'Description' field contains 'Resin-one surface, anterior'. The 'Patient Friendly Description' field contains 'Tooth-colored filling of a cavity of one surface of a front tooth, typically caused by tooth decay'. The 'Code Names' section shows '2330 ADA Code' and 'Resin1 Abbrev Desc'. The 'Treatment Flags' section includes 'Show in Chart' (checked) and 'Auto Continuing Care [NONE]'. The 'Procedure Category' is 'Restorative' and 'Appointment Type' is 'High Production'. The 'Treatment Area' is 'Surface' and 'Paint Type' is 'Surface restorations'. The 'Expenses' section has 'Lab' and 'Materials' fields. The 'Fee Schedule' table is visible on the right.

Fee Schedule	RVU Schedule	Edit Fee
1. Office		
2. FULLEM		62.00
3. DONTIST		58.00
4. DMO		55.00
5. FEE 5		0.00
6. B5ofPA		0.00
7. DELTA		0.00
8. UPlto999		0.00
9.		0.00
10.		0.00
11.		0.00
12.		0.00
13.		0.00
14.		0.00
15.		0.00
16.		0.00
17.		0.00
18.		0.00

Finance Charge Report

The Finance Charge Report lists the finance charges the practice has issued for a selected date or date range.

Why: To keep a record of the finance charges the practice issues each month, and to ensure finance charges are not duplicated

When: Monthly

FINANCE CHARGE REPORT

04/20/2018 - 04/23/2018 Procedure Date
Clinics: <ALL>
Provider: <ALL>
Billing Types: <ALL>

Report Date: 04/23/2018 Report Generated By: [Name] [Address] [Phone] Page 1 of 1

DATE	GUARANTOR NAME	AMOUNT	BILLING TYPE	PROVIDER	CLINIC
04/20/2018	Abbott, Patricia <Family>	22.00	2	DDS1	CENTRAL
04/23/2018	Abbott, Patricia <Family>	45.00	2	DDS1	CENTRAL
04/23/2018	Little, Brian <Family>	187.00	1	DDS1	CENTRAL
04/23/2018	Perkins, Shelly <Family>	100.00	1	DDS1	CENTRAL
TOTAL CHARGES:		354.00			

* family has payment agreement

DATE	GUARANTOR NAME	AMOUNT	BILLING TYPE	PROVIDER	CLINIC
Provider: DDS1		354.00			
Clinic: CENTRAL		354.00			
04/20/2018	Abbott, Patricia <Family>	22.00	2	DDS1	CENTRAL
04/23/2018	Abbott, Patricia <Family>	45.00	2	DDS1	CENTRAL
04/23/2018	Little, Brian <Family>	187.00	1	DDS1	CENTRAL
04/23/2018	Perkins, Shelly <Family>	100.00	1	DDS1	CENTRAL

DATE	GUARANTOR NAME	AMOUNT	BILLING TYPE	PROVIDER	CLINIC
Clinic: CENTRAL		354.00			
Provider: DDS1		354.00			
04/20/2018	Abbott, Patricia <Family>	22.00	2	DDS1	CENTRAL
04/23/2018	Abbott, Patricia <Family>	45.00	2	DDS1	CENTRAL
04/23/2018	Little, Brian <Family>	187.00	1	DDS1	CENTRAL
04/23/2018	Perkins, Shelly <Family>	100.00	1	DDS1	CENTRAL

How do I run the Finance Charge Report?

From the DXOne Reporting module, select **Management**, and then double-click **Finance/Late Charge**. For additional details about running this report, see the “Finance Charge Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report can be grouped and subtotaled by provider with a breakdown by clinic. Or, the report can be grouped and subtotaled by clinic with a breakdown by provider. The report contains the following information.

- A. Guarantor Name** – The guarantor to which a finance charge has been applied.
Note: Finance charges are applied to the guarantor of an account, not the patient.
- B. Amount** – The amount of the finance charge.
- C. Total Charges** – The total finance charges within the date range of the report.
- D. Provider Totals** – The finance charges are shown for the provider with a breakdown of the finance charges for each clinic the provider works in. Each clinic’s finance charges for that provider are subtotaled. The finance charge totals for the provider appear below the clinic subtotals.
- E. Clinic Totals** – The finance charges are shown for the clinic with a breakdown of the finance charges by each provider at that clinic. Each provider’s transactions for that clinic are subtotaled. The finance charge totals for the clinic appear below the provider subtotals.

Future Due Payment Plan Report - Monthly Totals

The Future Due Payment Plan - Monthly Totals Report displays future due payment totals by month.

\$	<p>Why: To project future revenue from future due payment plans</p> <p>When: Monthly or at the beginning of each budgeting cycle</p>
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MONTHLY TOTALS REPORT																	
The Dentist Group																	
04/01/2017 - 05/01/2018																	
Date:	05/30/2018	Page: 1															
MONTH	NUMBER OF CHARGES	TOTAL CHARGE AMOUNT															
1. April 2017	2	4005.56															
2. May 2017	1	105.56															
3. June 2017	1	105.56															
4. July 2017	1	105.56															
5. August 2017	1	105.56															
6. September 2017	1	105.56															
7. October 2017	1	105.56															
8. November 2017	1	105.56															
9. December 2017	1	105.56															
10. January 2018	1	105.56															
11. February 2018	1	105.56															
12. March 2018	1	105.56															
13. April 2018	1	105.56															
14. May 2018	1	105.56															
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">TOTAL NUMBER OF CHARGES: 15</td> <td style="width: 30%;">TOTAL AMOUNT: 5377.84</td> <td style="width: 40%;"></td> </tr> <tr> <td>AVERAGE NUMBER OF CHARGES: 2</td> <td>AVERAGE MONTHLY CHARGE AMOUNT: 384.14</td> <td></td> </tr> <tr> <td colspan="3" style="text-align: center;">REMAINING AFTER MAY 2010</td> </tr> <tr> <td>NUMBER OF CHARGES: 0</td> <td>TOTAL AMOUNT: 0.00</td> <td></td> </tr> <tr> <td></td> <td>NEXT CHARGE AMOUNT: 0.00</td> <td></td> </tr> </table>			TOTAL NUMBER OF CHARGES: 15	TOTAL AMOUNT: 5377.84		AVERAGE NUMBER OF CHARGES: 2	AVERAGE MONTHLY CHARGE AMOUNT: 384.14		REMAINING AFTER MAY 2010			NUMBER OF CHARGES: 0	TOTAL AMOUNT: 0.00			NEXT CHARGE AMOUNT: 0.00	
TOTAL NUMBER OF CHARGES: 15	TOTAL AMOUNT: 5377.84																
AVERAGE NUMBER OF CHARGES: 2	AVERAGE MONTHLY CHARGE AMOUNT: 384.14																
REMAINING AFTER MAY 2010																	
NUMBER OF CHARGES: 0	TOTAL AMOUNT: 0.00																
	NEXT CHARGE AMOUNT: 0.00																

How do I run the Future Due Payment Plan Report - Monthly Totals?

In the Office Manager, from the **Reports** menu, point to **Ledger**, and then click **Future Due Payment Plan Report**. For additional details about running this report, see the "Future Due Payment Plan Report" topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The following report information is found in the **Payment Plan** dialog box. To access this dialog box, in the Ledger, from the **Transaction** menu, click **Process Future Due Payment Plan**. Select a future due payment plan, and then click **OK**. The report contains the following information:

- A. Number of Payments** – The number of payments anticipated during a month.
- B. Total Payment Amount** – The projected revenue total from future due treatment plans.
- C. Report Totals** – The combined totals for all months.
- D. Remaining** – The number of charges, total amount, and next charge amount that will remain for all future due payment plans in a year from the current month.

Future Due Payment Plan Report - Standard

The Future Due Payment Plan Report displays patients with future due payment plans. Patients are listed alphabetically by the guarantor.

\$	Why: To review future due payment plans by patient
	When: Monthly or at the beginning of each budgeting cycle

FUTURE DUE PAYMENT PLAN REPORT							
The Dentist Group							
01/01/2018 - 01/01/2018							
Date: 04/23/2018						Page: 1	
GUARANTOR NAME	PATIENT NAME	PHONE NUM.	BILLING TYPE	DATE	TOTAL	REMAINING	MONTHS
Abbott, Patricia	Abbott, Patricia	555-1586	2	Last Claim Date: 01/01/2018	5000.00	Last Payment: 3900.00	1
Winters, Carl	Winters, Carl		1	Last Claim Date: 01/01/2018	2000.00	Last Payment: 1900.00	18
						TOTAL AMOUNT REMAINING:	5800.00
						TOTAL MONTHLY CHARGES:	4005.56

GUARANTOR NAME	PATIENT NAME	PHONE NUM.	BILLING TYPE	DATE	TOTAL	REMAINING	MONTHS	CHARGE AMT
Abbott, Patricia	Abbott, Patricia	555-1586	2	Last Claim Date: 01/01/2018	5000.00	Last Payment: 3900.00	1	3900.00

How do I run the Future Due Payment Plan Report?

In the Office Manager, from the **Reports** menu, point to **Ledger**, and then click **Future Due Payment Plan Report**. For additional details about running this report, see the "Future Due Payment Plan Report" topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?


The following report information is found in the **Payment Plan** dialog box. To access this dialog box, in the Ledger, from the **Transaction** menu, click **Process Future Due Payment Plan**. Select a future due payment plan, and then click **OK**. The report contains the following information:

- A. Total Amount Remaining** – The total balance of future due payment plans.
- B. Total Monthly Charges** – The total monthly revenue expected from future due payment plans listed in the report.
- C. Last Claim Date** – The date of the last claim for the procedures associated with the future due payment plan (if applicable).
- D. Last Payment** – The date and amount of the last payment (if any) posted to the patient's Ledger.
- E. Date** – The date the payment agreement was created.
- F. Total** – The total future due payment plan amount.
- G. Remaining** – The remaining amount to be paid.
- H. Months** – The number of remaining months for the plan.
- I. Payment** – The monthly amount charged to the patient.

Initial Health History Report

The Initial Health History Report displays the percentage of new oral health patients who have a **First Visit Date** in the Family File that is within a specified time frame and who had an initial health history (determined by specified ADA and/or condition codes) entered into their electronic records during the same time frame.

For example, you may want to track new patients who received a comprehensive oral exam (ADA code D0150)—the denominator code—and who have a history of smoking or tobacco use (a condition code; for example, 15995)—the numerator code.

	<p>Why: To view statistics regarding the oral health history of new patients</p> <p>When: Yearly</p>
---	--

Percent of Patients With Completed Health History

Date Range: 5/14/2018 - 5/14/2018 - Procedure Date
 Clinics: <ALL>
 Age Range: All Patients
 Providers: <ALL>
 Numerator Codes: D1330
 Denominator Codes: D0120, D1110, D1120

Report Date: 5/14/2018 Page 1 of 1

Clinic	Provider	Numerator	Denominator	Percent
	Patient Name	Chart	Procedure Codes	
CENTRAL		2	3	66.67%
DESMITH		2	2	100.00%
	Abbott, Jan	AB32	Numerator: D1330 Denominator: D1110	
	Crosby, Tom	CR95	Numerator: D1330 Denominator: D0120,D1120	
MHAYES		0	1	0.00%
	Winters, Jillian	WI213	Denominator: D0120,D1110	
Totals:		2	3	66.67%

How do I run the Initial Health History Report?

From DXOne Reporting, select **Lists**, and then double-click **Initial Health History**. For additional details about running this report, see the “Initial Health History Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).


What important information does this report provide?

The report contains the following information:

- A. Numerator** – The specified ADA codes and/or conditions.
- B. Denominator** – The specified ADA codes and/or conditions.
- C. Clinic Totals** – The Numerator, Denominator, and Percent totals for the providers at a given clinic on the report.
- D. Provider Totals** – The Numerator, Denominator, and Percent totals for a given provider who is attached to the Numerator and/or Denominator codes.
- E. Details** – If you select **Include Details** when setting options for this report, patient names, chart numbers, and procedures codes (numerators and denominators) appear on the report.
- F. Totals** – The Numerator, Denominator, and Percent grand totals for all clinics on the report.

Insurance Carrier List

The Insurance Carrier List displays a list of the dental/medical insurance carriers entered in Dentrix Enterprise. Depending on how you run the report, the subscribers and patients, or providers associated with each carrier can also appear on this report.



Why: To ensure insurance carriers are properly set up in Dentrix Enterprise
When: After Dentrix Enterprise setup, and as needed

DENTAL INSURANCE CARRIERS AND PROVIDER IDs								
Insurance Carriers: <ALL> - <ALL> Financial Class Types: <ALL>								
Report Date: 04/27/2018	Report Generated By: enterprise	Page 1 of 10						
<div style="border: 1px solid black; padding: 5px;"> <p>CARRIER: Aetna ADDRESS: 32465 Street Name City, UT 84003 PHONE: CONTACT: ALT CODE: ADA Code PAYOR ID:</p> </div>	<div style="border: 1px solid black; padding: 5px;"> <p>GROUP NAME: HSPS A GROUP NUM: UNION NUM: CLAIM FORMAT: TIME LIMIT: 0 days SOURCE OF PMT: EMPLOYER: FINANCIAL CLASS:</p> </div>	<div style="border: 1px solid black; padding: 5px;"> <p>DED S/P/O: LT, 0/0/0 IND, 0/0/0 FAM, 0/0/0 BENEFITS: IND, 0.00 FAM, 0.00 BENEFIT RENEWAL: January LAST UPDATE: 12/15/2017 # PROVIDERS: 1</p> <p><input type="checkbox"/> Replace Initial Zero of Procedure Code on Claims <input type="checkbox"/> Do Not Print Dental Diagnostic Codes on Claim</p> </div>						
<p><input type="checkbox"/> Do Not Bill To Dental Insurance if 0% Coverage <input type="checkbox"/> Do Not Bill To Dental Insurance</p>								
<div style="border: 1px solid black; padding: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>PROVIDER</th> <th>PROVIDER ID CODE</th> <th>PROVIDER ID NUMBER</th> </tr> </thead> <tbody> <tr> <td>DDS01 Smith, Dennis</td> <td>0B State License Number</td> <td>12345abc678def</td> </tr> </tbody> </table> </div>	PROVIDER	PROVIDER ID CODE	PROVIDER ID NUMBER	DDS01 Smith, Dennis	0B State License Number	12345abc678def		
PROVIDER	PROVIDER ID CODE	PROVIDER ID NUMBER						
DDS01 Smith, Dennis	0B State License Number	12345abc678def						

A

B

DENTAL INSURANCE CARRIERS AND SUBSCRIBERS																										
Insurance Carriers: Aetna - HSPS B - - Aetna - HSPS B - Financial Class Types: <ALL>																										
Report Date: 04/27/2018	Report Generated By: enterprise	Page 1 of 1																								
<div style="border: 1px solid black; padding: 5px;"> <p>CARRIER: Aetna ADDRESS: 32465 Street Name City, UT 84003 PHONE: CONTACT: ALT CODE: ADA Code PAYOR ID:</p> </div>	<div style="border: 1px solid black; padding: 5px;"> <p>GROUP NAME: HSPS B GROUP NUM: UNION NUM: CLAIM FORMAT: TIME LIMIT: 0 days SOURCE OF PMT: EMPLOYER: FINANCIAL CLASS:</p> </div>	<div style="border: 1px solid black; padding: 5px;"> <p>DED S/P/O: LT, 0/0/0 IND, 0/0/0 FAM, 0/0/0 BENEFITS: IND, 0.00 FAM, 0.00 BENEFIT RENEWAL: January LAST UPDATE: 12/15/2017 # SUBSCRIBERS: 2 # INSURED PATIENTS: 3</p> <p><input type="checkbox"/> Replace Initial Zero of Procedure Code on Claims <input type="checkbox"/> Do Not Print Dental Diagnostic Codes on Claim</p> </div>																								
<p><input type="checkbox"/> Do Not Bill To Dental Insurance if 0% Coverage <input type="checkbox"/> Do Not Bill To Dental Insurance</p>																										
<div style="border: 1px solid black; padding: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>SUBSCRIBER NAME</th> <th>BIRTHDATE</th> <th>CHART#</th> <th>SUBSCRIBER #</th> <th>EMPLOYER</th> <th>FAMILY</th> <th>DED MET</th> <th>BENEFITS</th> </tr> </thead> <tbody> <tr> <td>(P)Little, Patrick R</td> <td>11/11/1975</td> <td>P32143</td> <td>000-00-0000</td> <td></td> <td>Single</td> <td>0/0/0</td> <td>105.00</td> </tr> <tr> <td>(S)Little, Patrick R</td> <td>11/11/1975</td> <td>P32143</td> <td>000-00-0000</td> <td></td> <td>Single</td> <td>0/0/0</td> <td>0.00</td> </tr> </tbody> </table> </div>	SUBSCRIBER NAME	BIRTHDATE	CHART#	SUBSCRIBER #	EMPLOYER	FAMILY	DED MET	BENEFITS	(P)Little, Patrick R	11/11/1975	P32143	000-00-0000		Single	0/0/0	105.00	(S)Little, Patrick R	11/11/1975	P32143	000-00-0000		Single	0/0/0	0.00		
SUBSCRIBER NAME	BIRTHDATE	CHART#	SUBSCRIBER #	EMPLOYER	FAMILY	DED MET	BENEFITS																			
(P)Little, Patrick R	11/11/1975	P32143	000-00-0000		Single	0/0/0	105.00																			
(S)Little, Patrick R	11/11/1975	P32143	000-00-0000		Single	0/0/0	0.00																			

A

C

DENTAL INSURANCE CARRIERS, SUBSCRIBERS AND PATIENTS							
Insurance Carriers: Aetna - HSPS B - - Aetna - HSPS B -							
Financial Class Types: <ALL>							
Report Date: 04/27/2018				Report Generated By: enterprise		Page 1 of 1	
CARRIER: Aetna		GROUP NAME: HSPS B		DED S/P/O: LT,		0/0/0	
ADDRESS: 32465 Street Name		GROUP NUM:		IND,		0/0/0	
City, UT 84003		UNION NUM:		FAM,		0/0/0	
PHONE:		CLAIM FORMAT:		BENEFITS: IND,		0.00	
CONTACT:		TIME LIMIT: 0 days		FAM,		0.00	
ALT CODE: ADA Code		SOURCE OF PMT:		BENEFIT RENEWAL: January			
PAYOR ID:		EMPLOYER:		LAST UPDATE: 12/15/2017			
		FINANCIAL CLASS:		# SUBSCRIBERS: 2			
				# INSURED PATIENTS: 3			
<input type="checkbox"/> Replace Initial Zero of Procedure Code on Claims				<input type="checkbox"/> Do Not Bill To Dental Insurance if 0% Coverage			
<input type="checkbox"/> Do Not Print Dental Diagnostic Codes on Claim				<input type="checkbox"/> Do Not Bill To Dental Insurance			
NAME	BIRTHDATE	CHART#	SUBSCRIBER #	EMPLOYER	FAMILY	DED MET	BENEFITS
(P)Little, Brian R	11/11/1975	P32143	000-00-0000		Single	0/0/0	105.00
(S)Smith, Michael	11/11/1975	P32143	000-00-0000		Single	0/0/0	0.00
(P)Smith, Maggie	11/11/2000				Single		

How do I run the Insurance Carrier List?

From the DXOne Reporting module, select **Reference**, and then double-click **Insurance Carrier List**. For additional details about running this report, see the "Insurance Carrier List" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

When running the report, you can choose to include subscribers, subscribers and patients, or providers on the report. Of the following items, only the relevant ones appear on the report, depending on which option is selected when setting up options to run the report.

A. Insurance Carrier Details – The first four items that follow are found in the **Dental/Medical Insurance Plan Information** dialog box, which can be accessed in the Office Manager. The remaining items are found in the **Insurance Coverage** dialog box (dental only).

- **Claim Format** – The claim form used to send printed claims.
- **Alt Code** – Indicates whether ADA or alternate procedure codes are used when sending claims to the insurance carrier (dental only).
- **Payor ID** – A unique number used to identify an insurance carrier when submitting claims electronically. Payor IDs are updated regularly by the eServices clearinghouse.
- **Source of Payment** – The category used to identify payments received from the insurance carrier.
- **Claim Deadline** – The number of days/weeks/months/years in which a claim must be submitted to the insurance carrier.
- **Ded S/P/O**
 - **LT** – The lifetime deductible of a policy (if any).
 - **Ind** – The annual deductible for an individual.
 - **Fam** – The annual deductible for a family.
- **Benefits**
 - **Ind** – Yearly benefits for individuals.
 - **Fam** – Yearly benefits for families.

Alt Code: ADA >> Other Code: <input type="text"/>
 Claim Format: DX2012 <input type="text"/> Claim Setup
 Fee Schedule: <input type="text" value="<NONE>"/> >>
 RVU Schedule: <input type="text" value="<NONE>"/> >> Provider ID Setup
 Payor ID: 12345 >>
 Plan External ID: <input type="text"/>
 National Plan ID: <input type="text"/>
 Source of Payment: Commercial Insurance Co. <input type="text"/>
 MU Payor SOP: <input type="text"/> >>
 Insurance Claim Options:
 Diagnostic Code System: Unspecified <input type="text"/>
 Replace initial character of procedure code with: D
 Do Not include Dental Diagnostic Codes
 Do Not Include Group Plan Name
 Do Not Bill to Dental Insurance
 Do Not Bill to Dental Insurance if 0% Coverage
 Advanced <input type="button" value=">>"/>

Insurance Coverage - (Aetna Dental/HSPS Aetna)
 Deductible

	Lifetime Individual	Annual Individual	Annual Family	Maximum Benefit Individual:	Maximum Benefit Family:
Standard	0	500	1500	50000	15000
Preventive	0	1000	3000		
Other	0	1500	4500		

 Ortho Plan - Use as Ortho Lifetime Max
 Claim Deadline: <input type="text"/> >>
 Coverage Table

Beg Proc	End Proc	Category	Cov %	Ded	Co-Pay	Pre Est?
D0100	D1999	Diag/Preventive	100	St	0.00	<input type="checkbox"/>
D0100	-D1999	Diag/Preventive	100	S	0.00	N
D2000	-D2699	Basic Restor	80	S	0.00	N
D2700	-D2899	Crowns	50	S	0.00	N
D2900	-D2999	Restorative	80	S	0.00	N
D3000	-D3999	Endodontics	80	S	0.00	N
D4000	-D4999	Periodontics	80	S	0.00	N
D5000	-D5999	Prosth. remov	50	S	0.00	N

 Select Category
 Co-Payment Calculations for Ins Portion:
 Total Fee x Coverage %
 (Total Fee - Co-Pay) x Cov %
 (Total Fee x Cov %) - Co-Pay
 Select Table: <input type="text"/> >>
 Notes <input type="button" value="OK"/> <input type="button" value="Cancel"/>

- B. Provider Details** – The name, ID code, and ID number for each provider with an identification code entered for an insurance carrier. This information is found in the **Provider ID Setup** dialog box (see the “Setting up provider IDs for dental insurance” topic in the Family File portion of the Dentrix Enterprise Help for details on how to edit this information).

Provider ID Setup

Setup Provider IDs for this Provider and Insurance Plan:

Provider: DSMITH Smith, Dennis E

Insurance Plan: Aetna Dental, HSPS Aetna, 123456

Payor ID:

Provider IDs

OB State License Number: Clinic: >>

Provider ID Code	Provider ID Number	Clinic
OB State License Number	12345abc678def	MESA

Buttons: Add, Change, Delete, Clear Provider IDs, Copy Provider IDs, Close

- C. Subscriber Details** – The name, birth date, chart number, subscriber number, employer, and family status of each subscriber. The report also includes the portion of the subscriber’s deductible that has currently been met and the total benefits that have been used year-to-date.

Notes:

- “(P)” indicates a primary subscriber. “(S)” indicates a secondary subscriber.
- When viewing subscribers and patients on the report, subscribers are denoted with an asterisk.

- D. Patient Details** – The name, birth date, chart number, employer, and family status for each patient associated with the insurance carrier. The report also includes the portion of the patient’s deductible that has currently been met and the total benefits that have been used year-to-date.

Notes:

- “(P)” indicates a primary subscriber. “(S)” indicates a secondary subscriber.
- When viewing subscribers and patients on the report, subscribers are denoted with an asterisk.

Insurance Carrier Production - Full Report

The Insurance Carrier Production - Full Report lists the insurance carriers to which claims have been submitted. The production, payments, and adjustments appear individually for each carrier.

Why: To compare the amount of payments received from insurance carriers with the production billed to the corresponding carriers

When: Monthly and quarterly

Dental Insurance Carrier Production Report										
04/23/2018 - 04/23/2018 Entry Date Clinics: <ALL> Providers: <ALL> Financial Class Types: Plans with no Financial Class Assigned Patient Range: <ALL> - <ALL> Insurance Carriers: Aetna - HSPS A - - Aetna Life and Casualty - Aetna - 321863										
Report Date: 04/23/2018			Report Generated By: enterprise					Page 1 of 1		
Patient Name	Entry Date	Provider	Clinic	Description	Primary Production Amount	Secondary Production Amount	Insurance Payment Amount	Credit Adjustments	Debit Adjustments	
Aetna										
Little, Brian R	04/23/2018	DDS1	CENTRAL	D0120 - Periodic oral evaluation	25.00	0.00	-25.00			
Little, Brian R	04/23/2018	DDS1	CENTRAL	D0274 - Bitewings-four films	32.00	0.00	-32.00			
Little, Brian R	04/23/2018	DDS1	CENTRAL	D1110 - Prophylaxis-adult	48.00	0.00	-48.00			
Insurance Plan Totals:					105.00	0.00	-105.00	0.00	0.00	
Aetna Life and Casualty										
Abbott, James S	04/23/2018	DROBB	CENTRAL	D5212 - Mandibular partial - resin base	0.00	690.00	0.00			
Aetna Life and Casualty Insurance Plan Totals:					0.00	690.00	0.00	0.00	0.00	
Grand Totals:					105.00	690.00	-105.00	0.00	0.00	

How do I run the Insurance Carrier Production - Full Report?


From the DXOne Reporting module, select **Management**, and then double-click **Insurance Carrier Production**. For additional details about running this report, see the “Insurance Carrier Production Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Insurance Carrier** – The primary and secondary insurance carrier that has production within the date range of the report:
- B. Procedure Details** – The procedures for which a claim has been created appear with the following information:
- **Patient Name** – The name of the patient on whom the service was performed.
 - **Entry Date** – The date the procedure was posted to the Ledger.
 - **Primary Production** – The amount of production for which a primary claim has been created.
 - **Secondary Production** – The amount of production for which a secondary claim has been created.
 - **Insurance Payment** – The amount of the payment received from the insurance carrier for the procedure.
 - **Credit** – The credit adjustments made to the production.
 - **Debit** – The debit adjustments made to the production.
- C. Plan Totals** – The production, payment, and adjustment totals for the insurance carrier.
- D. Grand Totals** – The combined production, payment, and adjustment totals for the insurance carriers on the report.

Insurance Carrier Production - Summary Report

The Insurance Carrier Production - Summary Report lists the insurance carriers to which claims have been submitted. The production, payments, and adjustments appear for each carrier.

	<p>Why: To compare the amount of payments received from insurance carriers with the production billed to the corresponding carriers</p> <p>When: Monthly and quarterly</p>
---	--

Dental Insurance Carrier Production Report					
04/23/2018 - 04/23/2018 Entry Date Clinics: <ALL> Providers: <ALL> Financial Class Types: <ALL> Patient Range: <ALL> - <ALL> Insurance Carriers: <ALL> - <ALL>					
Report Date: 04/23/2018		Report Generated By: enterprise			Page 1 of 1
Insurance Carrier	Primary Production Amount	Secondary Production Amount	Insurance Payment Amount	Credit Adjustments	Debit Adjustments
A Aetna	105.00	0.00	-105.00	0.00	0.00
Aetna Life and Casualty	0.00	690.00	0.00	0.00	0.00
Met Life	90.00	0.00	0.00	0.00	0.00
Metropolitan Life	2,304.00	0.00	-532.00	0.00	0.00
C Grand Totals:	2,499.00	690.00	-637.00	0.00	0.00

How do I run the Insurance Carrier Production - Summary Report?

From the DXOne Reporting module, select **Management**, and then double-click **Insurance Carrier Production**. For additional details about running this report, see the “Insurance Carrier Production Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Insurance Carriers – The primary and secondary insurance carriers that have production within the date range of the report.

B. Production

- **Primary Production** – The amount of production for which primary claims have been created.
- **Secondary Production** – The amount of production for which secondary claims have been created.
- **Insurance Payments** – The amount of the payments received from the insurance carrier.
- **Adjustments** – The following adjustments:
 - **Credit** – The credit adjustments made to the production.
 - **Debit** – The debit adjustments made to the production.

C. Grand Totals – The combined production, payment, and adjustment totals for the insurance carriers on the report.

Insurance Claim Aging Report

The Insurance Claim Aging Report lists outstanding insurance claims, grouped by insurance carrier, along with the aged balances of each claim.

\$

Why: To identify unpaid claims so they can be targeted for collections

When: Monthly

Dental Insurance Claim Aging																		
Days Past Due: Over 0 Patient Range: <ALL> - <ALL> Carrier Range: <ALL> - <ALL> Clinics: <ALL> Providers: <ALL> Billing Types: <ALL>																		
Report Date: 05/04/2018					Report Generated By: enterprise					<div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">A</div> Page 1 of 1								
INSURANCE COMPANY/GROUP PLAN										PHONE #		GROUP NUM.						
SUBSCRIBER	ID NUM	TYPE	SENT	SERV.	TRACER	ON HOLD	RE-SENT	PATIENT NAME	BIRTHDAY ESTIMATE	1-30	31-60	61-90	91-120	121-150	151-180	181+	TOTAL	
Aetna Life and Casualty/Aetna										(800) 555-6444		321863						
Kenner, Spencer A	000-00-0000	PRM	5/1/18	5/2/18	5/3/18	5/3/18	5/4/18	Kenner, Spencer A	11/11/1977	391.20	0.00	0.00	0.00	0.00	0.00	0.00	514.00	514.00
Perkins, Shelly	000-00-0000	PRM	5/1/18	5/2/18	5/3/18	5/3/18	5/4/18	Perkins, Shelly	11/11/1975	341.60	452.00	0.00	0.00	0.00	0.00	0.00	0.00	452.00
Allied Group Insurance Trust/Allied Group Insurance Trust										(800) 555-7635		16023						
Smith, Dorothy	000-00-0000	PRM	5/1/18	5/2/18	5/3/18	5/3/18	5/4/18	Smith, Dorothy	11/11/1929	206.40	0.00	0.00	0.00	0.00	0.00	0.00	308.00	308.00
Butchers Local 551/Butchers Local 551												SS#						
Crosby, Brent	000-00-0000	PRM	5/1/18	5/2/18	5/3/18	5/3/18	5/4/18	Crosby, Brent	11/11/1975	183.00	0.00	0.00	0.00	0.00	0.00	0.00	183.00	183.00
Crosby, Carol	000-00-0000	PRM	5/1/18	5/2/18	5/3/18	5/3/18	5/4/18	Crosby, Carol	11/11/1975	183.00	0.00	0.00	0.00	0.00	0.00	0.00	183.00	183.00
Crosby, Shirley	000-00-0000	PRM	5/1/18	5/2/18	5/3/18	5/3/18	5/4/18	Crosby, Shirley	11/11/1975	292.00	0.00	0.00	0.00	0.00	0.00	0.00	292.00	292.00
Crosby, Tommy	000-00-0000	PRM	5/1/18	5/2/18	5/3/18	5/3/18	5/4/18	Crosby, Tommy	11/11/1975	905.00	0.00	0.00	0.00	0.00	0.00	0.00	905.00	905.00
Acme Parts Insurance/A.c.s.												SS#						
Little, Brian	000-00-0000	PRM	5/1/18	5/2/18	5/3/18	5/3/18	5/4/18	Little, Brian	11/11/1975	3,093.00	0.00	0.00	0.00	0.00	0.00	0.00	6,186.00	6,186.00
Met Life/Murphy's Trucking												SS#						
Taylor, Mark	000-00-0000	PRM	5/1/18	5/2/18	5/3/18	5/3/18	5/4/18	Taylor, Mark	11/11/1975	90.00	0.00	0.00	0.00	0.00	90.00	0.00	90.00	90.00
Metropolitan Life Insurance/Dental										(800) 555-8484		0027186						
Smith, Michael	000-00-0000	PRM	5/1/18	5/2/18	5/3/18	5/3/18	5/4/18	Little, Brian	11/11/1975	64.00	105.00	0.00	0.00	0.00	0.00	0.00	180.00	105.00
										ESTIMATE	1 - 30	31 - 60	61 - 90	91-120	121-150	151-180	181+	TOTAL
PRIMARY CLAIM TOTALS:										5,749.20	557.00	0.00	0.00	0.00	90.00	0.00	8,571.00	9,218.00
ARY CLAIM TOTALS:										0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL ALL CLAIMS:										5,749.20	557.00	0.00	0.00	90.00	0.00	8,571.00	9,218.00	

INSURANCE COMPANY/GROUP PLAN										PHONE #		GROUP NUM.						
SUBSCRIBER	ID NUM	TYPE	SENT	SERV.	TRACER	ON HOLD	RE-SENT	PATIENT NAME	BIRTHDAY ESTIMATE	1-30	31-60	61-90	91-120	121-150	151-180	181+	TOTAL	
Aetna Life and Casualty/Aetna										(800) 555-6444		321863						
Kenner, Spencer A	000-00-0000	PRM	5/1/18	5/2/18	5/3/18	5/3/18	5/4/18	Kenner, Spencer A	11/11/1977	391.20								
Perkins, Shelly	000-00-0000	PRM	5/1/18	5/2/18	5/3/18	5/3/18	5/4/18	Perkins, Shelly	11/11/1975	341.60								

How do I run the Insurance Claim Aging Report?

From the DXOne Reporting module, select **Ledger**, and then double-click **Insurance Claim Aging**. For additional details about running this report, see the “Insurance Claim Aging Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Aged Balances – The claim’s aged balances.

B. Service Date – The service date (the date of the procedure) is found in the **Primary** (or **Secondary**) **Insurance Claim** dialog box, which can be accessed by double-clicking a claim in the Ledger. The service date is automatically entered when a claim is created.

Description	Date	PS	TS	AMACPT	Modif.	U	Diag	Fee	Ins Pd
Prophylaxis with fluoride-ad B/R Orbital prosthesis	04/22/2018 04/22/2018	pla		1234	Mod	1	1	500.00 0.00	0.00 0.00
Total Billed:	500.00								
Ins Amt Total:	0.00								
Total Paid:	0.00								

C. Dates associated with the claim – If you have entered dates in the **Insurance Claim Status** dialog box, the corresponding dates appear on the report.

- **Sent** – The date the claim was sent. If you send a claim electronically, the Sent date is automatically entered in the **Insurance Claim Status** dialog box.
- **Tracer** – The date the tracer was sent (if any).
- **On Hold** – Indicates the date the claim was placed on hold (if any).
- **Re-Sent** – The date the claim was re-sent to the insurance carrier (if applicable). If you re-send a claim electronically, the Re-sent date is automatically entered in the **Insurance Claim Status** dialog box.

D. ID Num – A unique number that Dentrix Enterprise assigns to the claim. This number is not the same number that the insurance carrier assigns to the claim.

E. Totals – Totals for all insurance carriers listed.

Insurance Claims Not Sent Report

The Insurance Claims Not Sent Report lists insurance claims that have been created from the Ledger but not sent to the Batch Processor, printed, or sent through eClaims.

\$	<p>Why: To ensure claims are processed after being created from the Ledger</p> <p>When: Daily or weekly</p>
-----------	---

Dental Insurance Claims Not Sent								
Date Range: 04/23/2018 - 04/23/2018 Patient Range: <ALL> - <ALL> Carrier Range: <ALL> - <ALL> Clinics: <ALL> Providers: <ALL> Billing Types: <ALL>								
Report Date: 04/23/2018		Report Generated By: enterprise				(B)	Page 1 of 1	
CLAIM DATE	TYPE	PATIENT NAME	INSURANCE COMPANY NAME	PROVIDER	CLINIC	AMOUNT	EXPIRES	
04/23/2018	SEC	Abbott, James S	Aetna Life and Casualty	DDS2	CENTRAL	71.00	10/20/2018	
04/23/2018	PRM	Abbott, James S	Metropolitan Life	DDS1	CENTRAL	230.00	07/22/2018	
(A)	(D)					(C)		
						TOTAL OF PRIMARY NOT SENT:	230.00	
						TOTAL OF SECONDARY NOT SENT:	71.00	
						TOTAL OF CLAIMS NOT SENT:	301.00	

How do I run the Insurance Claims Not Sent Report?

From the DXOne Reporting module, select **Ledger**, and then double-click **Insurance Claims Not Sent**. For additional details about running this report, see the "Insurance Claims Not Sent Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Claim Date** – The date on which the claim was created from the Ledger.
- B. Amount** – The claim amount.
- C. Expires** – The deadline by which the insurance carrier must receive the claim after the service date.
- D. Totals** – The amount of the primary, secondary, and all claims not sent.

Insurance Coverage Tables Report

The Insurance Coverage Tables Report allows you to view and print the coverage tables that have been set up for each insurance plan.

\$ Why: To ensure coverage tables have been set up properly for each insurance plan
When: After Dentrix Enterprise setup, and as needed

INSURANCE COVERAGE TABLES							
The Dentist Group							
Date: 04/22/2018						Page: 19	
CONNECTICUT GENERAL P.O. Box 123456 Hartford, CT 06104				Group Name: Acme Electric Group #: 0443737			
BEGIN PROC	END PROC	CATEGORY	COV %	DEDUCTIBLE	CO PAY	PRE AUTH?	
D0100	D1999	Diag/Preventive	90	Standard	0.00	N	
D2000	D2699	Basic Restor	80	Standard	0.00	N	
D2700	D2899	Crowns	50	Standard	0.00	N	
D2900	D2999	Restorative	80	Standard	0.00	N	
D3000	D3999	Endodontics	80	Standard	0.00	N	
D4000	D4999	Periodontics	80	Standard	0.00	N	
D5000	D5999	Prosth, remov	50	Standard	0.00	N	
D6000	D6999	Prosth, fixed	50	Standard	0.00	N	
D7000	D7999	Oral Surgery	80	Standard	0.00	N	
D8000	D8999	Orthodontics	100	Standard	0.00	N	
D9000	D9999	General Service	80	Standard	0.00	N	
Co-Payments Used in Calculations? (No)			(B)	(C)	(D)	(E)	
Co-Pay Calculation For Ins Portion: (None)							
CONNECTICUT GENERAL P.O. Box 1234 Hartford, CT 06104				Group Name: Actors Guild Group #: 0443737			
BEGIN PROC	END PROC	CATEGORY	COV %	DEDUCTIBLE	CO PAY	PRE AUTH?	
D0100	D1999	Diag/Preventive	90	Standard	0.00	N	
D2000	D2699	Basic Restor	80	Standard	0.00	N	
D2700	D2899	Crowns	50	Standard	0.00	N	
D2900	D2999	Restorative	80	Standard	0.00	N	
D3000	D3999	Endodontics	80	Standard	0.00	N	
D4000	D4999	Periodontics	80	Standard	0.00	N	
D5000	D5999	Prosth, remov	50	Standard	0.00	N	
D6000	D6999	Prosth, fixed	50	Standard	0.00	N	
D7000	D7999	Oral Surgery	80	Standard	0.00	N	
D8000	D8999	Orthodontics	100	Standard	0.00	N	
D9000	D9999	General Service	80	Standard	0.00	N	
Co-Payments Used in Calculations? (No)							
Co-Pay Calculation For Ins Portion: (None)							
CONNECTICUT GENERAL P.O. Box 1234 Hartford, CT 06104				Group Name: Actors Guild - Top Grossers Group #: 0443737			
BEGIN PROC	END PROC	CATEGORY	COV %	DEDUCTIBLE	CO PAY	PRE AUTH?	
D0100	D1999	Diag/Preventive	90	Standard	0.00	N	
D2000	D2699	Basic Restor	80	Standard	0.00	N	
D2700	D2899	Crowns	50	Standard	0.00	N	
D2900	D2999	Restorative	80	Standard	0.00	N	
D3000	D3999	Endodontics	80	Standard	0.00	N	
D4000	D4999	Periodontics	80	Standard	0.00	N	
D5000	D5999	Prosth, remov	50	Standard	0.00	N	
D6000	D6999	Prosth, fixed	50	Standard	0.00	N	
D7000	D7999	Oral Surgery	80	Standard	0.00	N	
D8000	D8999	Orthodontics	100	Standard	0.00	N	
D9000	D9999	General Service	80	Standard	0.00	N	
Co-Payments Used in Calculations? (No)							
Co-Pay Calculation For Ins Portion: (None)							

How do I run the Insurance Coverage Tables Report?

In the Office Manager, from the **Reports** menu, point to **Reference**, and then click **Insurance Coverage Tables**. For additional details about running this report, see the “Insurance Coverage Tables Report” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

All of the following information (except for letter A) is found in the **Insurance Coverage** dialog box, which can be accessed in the Office Manager. For details on how to edit a carrier’s coverage information, see the “Assigning coverage tables” topic in the Family File portion of the Dentrix Enterprise Help.

A. Insurance Carrier Details – The name, mailing address, group name, and group number of the insurance plan.

B. Cov % – The percentage of a procedure covered by the insurance plan.

C. Deductible – The type of deductible (such as, None, Standard, Preventive, or Other).

D. Co Pay – The co-pay amount.

E. Pre Auth? – Indicates whether or not a procedure group requires pre-authorization from the insurance carrier.

F. Co-Payments Used in

Calculations? – Indicates whether or not co-payments are considered when calculating the insurance portion of a procedure.

G. Co-Pay Calculated For Ins Portion – The method used to calculate the insurance portion of a procedure when taking into consideration co-payments: **Total Fee X Coverage %**, **(Total Fee - Co-Pay) x Cov %**, or **(Total Fee x Cov %) - Co-Pay**.

Insurance Coverage - (Aetna Dental/HSPS Aetna)

Deductible

	Lifetime Individual	Annual Individual	Annual Family
Standard	0	500	1500
Preventive	0	1000	3000
Other	0	1500	4500

Maximum Benefit

Individual:	Family:
50000	15000

Ortho Plan - Use as Ortho Lifetime Max

Claim Deadline: >>

Coverage Table

Beg Proc	End Proc	Category	%	Ded	Co-Pay	Est?
D0100	D1999	Diag/Preventive	100	\$	0.00	N
D0100	-D1999	Diag/Preventive	100	\$	0.00	N
D2000	-D2699	Basic Restor	80	\$	0.00	N
D2700	-D2899	Crowns	50	\$	0.00	N
D2900	-D2999	Restorative	80	\$	0.00	N
D3000	-D3999	Endodontics	80	\$	0.00	N
D4000	-D4999	Periodontics	80	\$	0.00	N
D5000	-D5999	Prosthodontics	50	\$	0.00	N

Select Category

Co-Payment Calculations for Ins Portion

Total Fee x Coverage %

(Total Fee - Co-Pay) x Cov %

(Total Fee x Cov %) - Co-Pay

Select Table: >>

Buttons: Add, Change, Delete, Clear Table, Notes, OK, Cancel

Insurance Eligibility Report

The Insurance Eligibility Report displays patients with appointments who are eligible for coverage.



Why: To ensure the practice has checked insurance eligibility for patients with upcoming appointments



When: Daily

INSURANCE ELIGIBILITY REPORT

The Dentist Group

Appointment Date Range 04/01/2018 - 04/25/2018

Date: 04/24/2018

Page: 1



INSURANCE COMPANY/GROUP PLAN Elig Date Patient	Chart #	GROUP# DOB	PHONE # Prim/Sec	STREET ADDRESS Subscriber	Subscriber ID	Appt Date/Time	CITY ST
Aetna Life and Casualty / Aetna 04/22/2018 Perkins, Peggy		321863 11/11/1957	(800)555-6444 Primary	P.O. Box 12345, Perkins, Peggy	000-00-0000	04/24/2018 9:00 AM	Fort Wa
Aetna Life and Casualty / Aetna 04/22/2018 Perkins, Shelly	PA00070	321863 11/11/1980	(800)555-6444 Primary	P.O. Box 40945, Perkins, Peggy	000-00-0000	04/24/2018 9:10 AM	Fort Wa
04/22/2018 Perkins, John	PA0008	11/11/1960	Primary	Perkins, Peggy	000-00-0000	04/24/2018 9:20 AM	
04/22/2018 Abbott, James S	ABB101	11/11/1962	Secondary	Abbott, Patricia	000-00-0000	04/24/2018 9:10 AM	
Metropolitan Life Insurance / Dental Smith, Michael	SM0010	0027186 11/11/1970	(800)555-8484 Primary	P.O. Box 480, Smith, Michael	000-00-0000	04/24/2018 10:10 AM	Warwic
Metropolitan Life / Metropolitan 04/22/2018 Abbott, Shirley	ABB102	74170 11/11/1962	(415)555-3222 Primary	P.O. Box 2978, Abbott, James S	000-00-0000	04/24/2018 9:10 AM	Englew

How do I run the Insurance Eligibility Report

In the Office Manager, from the **Reports** menu, point to **Lists**, and then click **Insurance Eligibility Report**. For additional details about running this report, see the “Insurance Eligibility Report” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Insurance** – The insurance company and group plan information.
- B. Patient** – The patient’s information and the next scheduled appointment.
- C. Eligibility Date** – Indicates the date that insurance eligibility was last checked for the patient. Use this date to ensure all patients with appointments on a given day are currently eligible for coverage. If no date appears, eligibility has never been checked and entered for the patient. The **Last Eligibility Check** is found in the **Insurance Information** dialog box, which can be accessed from the Family File. For details about how to enter the date when insurance eligibility is verified, see the topics for “Working With Insurance” in the Family File portion of the Dentrix Enterprise Help.

The screenshot shows the "Insurance Information - (Abbott, James)" dialog box. It has two tabs: "Dental Insurance" and "Medical Insurance".

Insurance Plans section:

- Coverage Order:
 - Aetna Dental Preferred
 - None
 - None
 - None
- Clear Coverage button

Plan Information section:

- Subscriber: Abbott, James
- Carrier: Aetna Dental Preferred
- Subscriber Id #: [Empty]
- Signature on File:
 - Release of Information
 - Assignment of Benefits
- Last Plan Eligibility Check: 01/01/2018
- Plan Effective Date: 01/01/2000
- Plan Expiration Date: [Empty]

Patient Information section:

- Relation to Subscriber:
 - Self
 - Spouse
 - Child [Dropdown]
 - Other [Dropdown]
- Not Eligible
- Last Eligibility Check: 01/01/2018
- Eligibility Start: 01/01/2000
- Eligibility End: [Empty]

Buttons at the bottom: View Insurance Plan History, OK, Cancel.

Insurance Transaction Analysis Report

The Insurance Transaction Analysis Report displays charges (claims) and payments posted for a selected date range. Charges and payments are grouped by insurance carrier.

Why: To view the claims and payment issued for a selected date range for an insurance carrier, and to view the total value of claims posted for all insurance carriers

When: As needed

Dental Insurance Transaction Analysis

01/01/2018 - 06/30/2018 Procedure Date
 Insurance Type: Dental Insurance Include -Secondary-Tertiary-Quaternary-
 Clinics: <ALL>
 Charge Providers: <ALL>
 Billing Types: <ALL>
 Financial Classes: <ALL>

Report Date: 6/30/2018 Report Generated By: DSMITH Page 1 of 2

Access Dental Group Name: HSPS3										
Financial Class: Group #: 4455558										
Patient Name	Chart	Sent	Received	Claim Amt	Estimate	Birthdate	SS#	Subscriber #		
Transaction Date	Description			Charge Amt	Payment Amt		Provider	Clinic		
Crosby, Brent	CR93	S	06/30/2018	950.00	425.00	11/11/1970	111-11-1111	222-22-2222		
05/14/2018	D2750 [TH:6] Crown-porc fuse high noble mtl			850.00			DSMITH	CENTRAL		
05/14/2018	-Write-Off					-20.00	DSMITH	CENTRAL		
05/14/2018	Insurance Payment				-405.00		DSMITH	CENTRAL		
05/14/2018	Insurance Payment				-20.00		DSMITH	CENTRAL		
05/14/2018	POCHK Post Operative Check			100.00			DSMITH	CENTRAL		
05/14/2018	Visa					-100.00	DSMITH	CENTRAL		
Farrer, Lisa	FA64	P	03/31/2018	03/31/2018	669.00	535.20	11/11/1988	111-11-1111		
03/31/2018	D3330 [TH:14] Root canal therapy - molar			669.00				AF		
03/31/2018	Insurance Payment				-669.00		MHAYES	AF		
03/31/2018	+Debit Adjustment			81.00			MHAYES	AF		
03/31/2018	Insurance Payment					-81.00	MHAYES	AF		
ACME Insurance Group Name: HSPS1										
Financial Class: Group #: 1112223										
Patient Name	Chart	Sent	Received	Claim Amt	Estimate	Birthdate	SS#	Subscriber #		
Transaction Date	Description			Charge Amt	Payment Amt		Provider	Clinic		
Crosby, Brent	CR93	P	04/20/2018	04/20/2018	210.00	0.00	11/11/1970	111-11-1111		
04/20/2018	D2392 [TH:15] Resin-2 surface poster			210.00			DSMITH	CENTRAL		
04/20/2018	Visa					-42.00	DSMITH	AF		
04/20/2018	Insurance Payment				-168.00		DSMITH	CENTRAL		
Crosby, Brent	CR93	P	05/14/2018	06/30/2018	950.00	425.00	11/11/1970	111-11-1111		
05/14/2018	D2750 [TH:6] Crown-porc fuse high noble mtl			850.00			DSMITH	CENTRAL		
05/14/2018	-Write-Off					-20.00	DSMITH	CENTRAL		
05/14/2018	Insurance Payment				-405.00		DSMITH	CENTRAL		
05/14/2018	Insurance Payment				-20.00		DSMITH	CENTRAL		
05/14/2018	POCHK Post Operative Check			100.00			DSMITH	CENTRAL		
05/14/2018	Visa					-100.00	DSMITH	CENTRAL		

- A
- B
- C
- D
- E

		TOTALS		
Total Claims Sent:	4	F	Total Claims Sent:	11
Total Claims Received:	4		Total Claims Received:	8
Insured Charges:	7 1,700.00		Insured Charges:	23 6,130.00
Total Insurance Payments:	5 -1,033.00		Total Insurance Payments:	8 -3,166.20
Total Patient Payments:	3 -207.00		Total Patient Payments:	6 -1,192.30
Total Credit Adjustments:	1 -20.00		Total Credit Adjustments:	3 -231.00
Total Charge Adjustments:	0 1,700.00		Total Charge Adjustments:	4 7,080.00

How do I run the Insurance Transaction Analysis Report?

From the DXOne Reporting module, select **Analysis**, and then double-click **Insurance Transaction Analysis**. For additional details about running this report, see the "Insurance Transaction Analysis Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Claim Details

Note: If a patient has multiple claims posted during the date range of the report, each claim appears separately.

- **Sent** – The date the claim was posted.

Note: If a report is filtered by procedure date, the sent date can fall outside the date range of the report.

- **Received** – The date a payment was received for the claim.

Secondary/Tertiary/Quaternary Claims – If you select **Include Secondary Claims**, **Include Tertiary Claims**, and/or **Include Quaternary Claims** when setting options for this report, secondary, tertiary, and/or quaternary claims appear on the report.

Note: For secondary, tertiary, and quaternary claims, claim charges are not itemized.

B. Charges – If you select **Include Charges** when setting options for this report, the procedures billed on a claim appear on the report.

C. Insurance Payments – If you select **Include Claim Charges and Payments** when setting options for this report, payments made by the insurance carrier are itemized on the report.

D. Adjustments – If you select **Include Charge Adjustments** and/or **Include Credit Adjustments** when setting options for this report, adjustments appear on the report.

E. Patient Payments – If you select **Include Patient Payments** when setting options for this report, patient payments appear on the report.

F. Totals – If you select **Include SubTotals by Carrier** and/or **Include Grand Totals** when setting options for this report, totals for each carrier appear on the report, and/or totals for all carriers appear at the end of the report. The following totals appear, according to the information you choose to include when setting options for this report:

- **Total Claims Sent & Received** – The number of claims sent and received.
- **Insured Charges** – The number and dollar amount of charges billed to insurance.
- **Total Insurance & Patient Payments** – The number and dollar amount of insurance payments and patient payments.
- **Total Credit & Charge Adjustments** – The number and dollar amount of credit and charge adjustments.

Late Charge Report

The Late Charge Report lists the late charges the practice has issued for a selected date or date range.

\$

Why: To keep a record of the late charges the practice issues each month, and to ensure late charges are not duplicated

When: Monthly

LATE CHARGE REPORT

04/22/2011 - 04/23/2011 Procedure Date
 Clinics: CENTRAL
 Provider: DDS1
 Billing Types: <ALL>

Report Date: 04/23/2011

Report Generated By: [A] [B] [C] [D] [E]

Page 1 of 1

DATE	GUARANTOR NAME	AMOUNT	BILLING TYPE	PROVIDER	CLINIC
04/22/2011	Abbott, Patricia <Family>	21.00	2	DDS1	CENTRAL
04/23/2011	Abbott, Patricia <Family>	20.00	2	DDS1	CENTRAL
04/23/2011	Little, Brian <Family>	70.00	1	DDS1	CENTRAL
04/23/2011	Perkins, Shelly <Family>	7,840.00	1	DDS1	CENTRAL

C

TOTAL CHARGES:

7,951.00

* family has payment agreement

D

DATE	GUARANTOR NAME	AMOUNT	BILLING TYPE	PROVIDER	CLINIC
Provider: DDS1		7,951.00			
Clinic: CENTRAL		7,951.00			
04/22/2011	Abbott, Patricia <Family>	21.00	2	DDS1	CENTRAL
04/23/2011	Abbott, Patricia <Family>	20.00	2	DDS1	CENTRAL
04/23/2011	Little, Brian <Family>	70.00	1	DDS1	CENTRAL
04/23/2011	Perkins, Shelly <Family>	7,840.00	1	DDS1	CENTRAL

E

DATE	GUARANTOR NAME	AMOUNT	BILLING TYPE	PROVIDER	CLINIC
Clinic: CENTRAL		7,951.00			
Provider: DDS1		7,951.00			
04/22/2011	Abbott, Patricia <Family>	21.00	2	DDS1	CENTRAL
04/23/2011	Abbott, Patricia <Family>	20.00	2	DDS1	CENTRAL
04/23/2011	Little, Brian <Family>	70.00	1	DDS1	CENTRAL
04/23/2011	Perkins, Shelly <Family>	7,840.00	1	DDS1	CENTRAL

How do I run the Late Charge Report?

From the DXOne Reporting module, select **Management**, and then double-click **Finance/Late Charge**. For additional details about running this report, see the “Finance/Late Charge” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report can be grouped and subtotaled by provider with a breakdown by clinic. Or, the report can be grouped and subtotaled by clinic with a breakdown by provider. The report contains the following information.

A. Guarantor Name – The guarantor to which a late charge has been applied.

Note: Late charges are applied to the guarantor of an account, not the patient.

B. Amount – The amount of the late charge.

C. Total Charges – The total late charges within the date range of the report.

D. Provider Totals – The late charges are shown for the provider with a breakdown of the late charges for each clinic the provider works in. Each clinic’s late charges for that provider are subtotaled. After the clinic subtotals, the late charge totals for the provider appear.

E. Clinic Totals – The late charges are shown for the clinic with a breakdown of the late charges by each provider at that clinic. Each provider’s late charges for that clinic are subtotaled. The late charge totals for the clinic appear below the provider subtotals.

Letter Merge Reports

The Dentrax Enterprise Letter Merge feature allows you to create custom reports and letters.

  	Why: To create custom reports	 
	When: As needed	

	A	B	C	D	E	F	G	H	I
1	LName	FName	Street	Street2	City	State	Zip	HPhone	Prov_Name
2	Abbott	Ken	123 S Oak St	Apt. 101	Eastside	NV	11111	(801)555-1586	Dennis Smith
3	Brown	Mary	123 N Cedar Ave	Apt. 304	Eastside	NV	11111	(801)555-4509	Dennis Smith Junior
4	Crosby	Brent	123 N Spruce St	P.O. Box 110	Eastside	NV	11111	(801)555-5969	Dennis Smith
5	Crosby	Shirley	123 N Spruce St	P.O. Box 110	Eastside	NV	11111	(801)555-5969	Dennis Smith
6	Davis	Kelly	1234 N. State Road #65		Eastside	NV	11111	(801)555-1530	Dennis Smith
7	Edwards	John	123 N Pine St		Eastside	NV	11111	(801)555-7101	Erica Evans
8	Edwards	Kimberly	124 N Pine St		Eastside	NV	11111	(801)555-7101	Erica Evans
9	Farrer	Lisa	123 S Cedar St		Southside	NV	33333	(801)555-0213	Dennis Smith
10	Gleason	Alice	123 S Pine Rd		Southside	NV	33333	(801)555-8539	Dennis Smith
11	Hansen	Corey	123 N 123 E		Southside	NV	33333	(801)555-1714	Dennis Smith
12	Hayes	Sally	123 Oak Street	Suite # 500	Eastside	NV	11111	(111)555-8961	Dennis Smith
13	Johnson	Rachelle	123 W Main St		Southside	NV	33333	(111)555-8962	Dennis Smith
14	Kenner	Spencer	123 N Olive		Southside	NV	33333	(801)555-8504	Brenda Childs
15	Little	Brian	123 N 123 W		Southside	NV	33333	(111)555-6241	Dennis Smith
16	Nelson	Chris	745 Rice Ave		Westside	NV	44444	(801)555-5824	Dennis Smith
17	Perkins	Shelly	123 S Oak St		Westside	NV	44444	(801)555-5462	Paula Pearson
18	Reeves	Elisabeth	123 N Garden Dr.		Westside	NV	44444	(801)555-2729	Dennis Smith
19	Smith	Michael	1234 Topple Rd		Westside	NV	44445	(801)555-2730	Steve Sorensen
20	Taylor	Mark	123 S Center St		Centerville	NV	55555	(801)555-3324	Dennis Smith
21	Valgardson	Adrian	123 S Opal Dr		Centerville	NV	55555	(801)555-1821	Dennis Smith
22	Winters	Carl	1234 S Main St		Centerville	NV	55555	(801)555-5495	Dennis Smith

How do I run the Letter Merge Reports?

From the Office Manager, select **Letters**, and then set up a letter merge. For additional details about merging letters, see the “Merging Dentrix Enterprise letters” and “Other create and merge options” topics in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The information displayed in this reports is customizable and depends on letter setup configurations. The following is a comprehensive list of possible data you can display:

Patient

Last Name	Status
First Name	Birth Date
Middle Initial	Family Position
Address	Preferred Name
City	First Visit Date
State	Last Visit Date
Zip	Last Referral Date
Home Phone	Salutation
Work Phone	Title
Work Phone Extension	Other ID
Social Security Number	Language
Chart Number	E-mail Address
Gender	

Practice

Name	Phone
Address	Phone Extension
City, State, and Zip	

Billing

Billing Type	Balance
Aging 0-30	Last Payment Date
Aging 30-60	Last Payment Amount
Aging 60-90	Guarantor Last Name
Aging >90	Guarantor First Name

Insurance

Primary Insurance Name	Secondary Insurance Name
Primary Remaining Benefits	Secondary Remaining Benefits
Primary Subscriber ID	Secondary Subscriber ID

Employer

Name	City, State, and Zip
Address	Phone

Referred By

Referral Source Last Name	Salutation
Referral Source First Name	Address
Middle Initial	City, State, and Zip
Title	Phone

Referred To

Referral Last Name	Address
Referral First Name	City, State, and Zip
Middle Initial	Phone
Title	Date
Salutation	

Payment Plan

Total	Payment
Balance	Payment Date

Provider

Name
Title

Appointment

Date	Provider ID
Time	Phone
Reason	Address
Name	City, State, and Zip
Provider	

Continuing Care


Due Date	Appointment Date
Type Name	Appointment Time
Type Description	Appointment Reason
Note	Appointment Provider
Prior Work Date	


Date of Service

Procedure Date	Insurance Payments
Total Charges	

Meaningful Use Measure Calculation List

The Meaningful Use Measure Calculation List displays the result of each Meaningful Use measure, the denominator and numerator used for calculating the actual percentage for that result, and the details of the requirement for that result.





Why: To view the calculated results of Meaningful Use measures for eligible providers

When: As needed

Meaningful Use Measure Calculation

Selected Report Options

Stage: Stage 1

Provider: <All>

Date: 90 days starting on 1/30/2013

Vitals Exclusions: No Exclusions

Stage 1 Alt: CPOE, Vital Signs >>

Calculation

Calculate and Print

Calculate Only

Meaningful Use Measure Calculation Results (From Last Calculation)

<All Providers>

Title	Numerator	Denominator	Required	Actual
Computerized Provider Order Entry (CPOE)	3	4	30%	75%
Problem List	4	8	80%	50%
Electronic Prescribing (eRx)	0	3	40%	0%
Medication List	3	8	80%	38%
Medication Allergy List	3	8	80%	38%
Record Patient Demographics	0	8	50%	0%
Vital Signs	1	6	50%	17%
Smoking Status	3	6	50%	50%
Provide patients with electronic copy of their health inform...	0	0	50%	0%
Provide clinical summaries for patients for each office visit	0	9	50%	0%
Incorporate clinical lab-test results	0	0	40%	0%
Send reminders to patients for preventive / follow up care	0	761	20%	0%
Perform medication reconciliation	0	9	50%	0%
Provide patient-specific education resources	2	8	10%	25%
Provide patients with timely electronic access	0	0	10%	0%
Provide summary of care record for each transition of care	0	1	50%	0%

Details:

Title: Computerized Provider Order Entry (CPOE)

Description: More than 30 percent of unique patients with at least one medication in their medication list seen by the EP during the EHR reporting period have at least one medication order entered using CPOE

How do I run the Meaningful Use Measure Calculation List?

In the Office Manager, from the **Analysis** menu, point to **Meaningful Use**, and then click **Meaningful Use Measure Calculation**. Select the desired report options, and then click **Calculate and Print** or **Calculate Only**. For additional details about running this report, see the “Meaningful Use Measure Calculation List” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

You can view the list of calculations for all providers or a specific provider.

- A. Measures** – The list of measures.
- B. Numerator** – The numerator used in the calculation. Double-click to view a list of patients.
- C. Denominator** – The denominator used in the calculation. Double-click to view a list of patients.
- D. Required** – The percentage required.
- E. Actual** – The calculated actual percentage.
- F. Details** – An explanation of the requirements for a selected measure.

The tables on the pages that follow explain the calculations and requirements for each measure.

Stage 1

Measure	Requirement	Denominator	Numerator
Computerized Provider Order Entry (CPOE) Standard measure for CPOE	More than 30 percent of unique patients with at least one medication in their medication list seen by the EP during the EHR reporting period have at least one medication order entered using CPOE.	The number of patients who have at least one medication (active or inactive) and who have a patient health assessment, medical encounter, or dental procedure with one of the selected Providers and with a procedure date that falls within the specified Date Range.	The number of patients (from the Denominator) who have at least one medication that was ordered using CPOE.
Alternate measure for CPOE	More than 30 percent of medication orders created by the EP during the EHR reporting period are recorded using CPOE (Alternative measure - effective 2013 onward).	The number of patients who have at least one medication (active or inactive) and who have a patient health assessment, medical encounter, or dental procedure with one of the selected Providers and with a procedure date that falls within the specified Date Range.	The number of prescriptions that were ordered using CPOE by one of the selected Providers within the specified Date Range.
Problem List	More than 80 percent of all unique patients seen by the EP during the EHR reporting period have at least one entry or an indication that no problems are known for the patient recorded as structured data.	The number of patients who were seen by one of the selected Providers within the specified Date Range.	The number of patients (from the Denominator) who have at least one medical alert/problem or an indication that the patient has no known problems.

Measure	Requirement	Denominator	Numerator
Electronic Prescribing (eRx)	More than 40 percent of all permissible prescriptions written by the EP during the EHR reporting period are transmitted electronically using Certified EHR Technology.	The number of prescriptions (except for OTC drugs and controlled substances) that were written by one of the selected Providers within the specified Date Range.	The number of prescriptions (from the Denominator) that were written by one of the selected Providers and transmitted electronically within the specified Date Range.
Medication List	More than 80 percent of all unique patients seen by the EP during the EHR reporting period have at least one medication entry (or an indication that the patient is not currently prescribed any medication) recorded as structured data.	The number of patients who have a patient health assessment, medical encounter, or dental procedure with one of the selected Providers and with a procedure date that falls within the specified Date Range.	The number of patients (from the Denominator) who have at least one medication with an active status or an indication that no medications are known for the patient.
Medication Allergy List	More than 80 percent of all unique patients seen by the EP during the EHR reporting period have at least one medication allergy entry (or an indication that the patient has no known medication allergies) recorded as structured data.	The number of patients who were seen by one of the selected Providers within the specified Date Range.	The number of patients (from the Denominator) who have at least one medical alert/problem or an indication that the patient has no known medication allergies.
Demographics	More than 50 percent of all unique patients seen by the EP have demographics recorded as structured data.	The number of patients who were seen by one of the selected Providers within the specified Date Range.	The number of patients (from the Denominator) who have data in their records for all the required demographics (including any specific exclusions if the patient declined to provide that information or if recording that element is contrary to state law).

Measure	Requirement	Denominator	Numerator
<p>Vital Signs</p> <p>Standard measure for vital signs</p>	<p>More than 50 percent of all unique patients age 2 and over seen by the EP have height, weight and blood pressure recorded as structured data.</p>	<p>The number of patients who are at least two years old and who have a patient health assessment, medical encounter, or dental procedure with one of the selected Providers and with a procedure date within the specified Date Range.</p>	<p>The number of patients (from the Denominator) for whom height/length, weight, and blood pressure have been recorded in a patient health assessment within the specified Date Range.</p>
<p>Alternate measure for vital signs with no vital sign exclusions</p>	<p>More than 50 percent of all unique patients seen by the EP during the EHR reporting period have blood pressure (for patients age 3 and over only) and height/length and weight (for all ages) recorded as structured data (Optional effective 2013/ Required 2014).</p>	<p>The number of patients who have a patient health assessment, medical encounter, or dental procedure with one of the selected Providers and with a procedure date within the specified Date Range.</p>	<p>The number of patients (from the Denominator) who are at least 3 years old and for whom height/length, weight, and blood pressure have been recorded in a patient health assessment within the specified Date Range; and the number of patients younger than 3 years of age for whom height/length and weight have been recorded in a patient health assessment within the specified Date Range.</p>
<p>Alternate measure for vital signs with blood pressure exclusion</p>	<p>More than 50 percent of all unique patients seen by the EP during the EHR reporting period have height/length and weight (for all ages) recorded as structured data (Optional effective 2013/Required 2014).</p>	<p>The number of patients who have a patient health assessment, medical encounter, or dental procedure with one of the selected Providers and with a procedure date within the specified Date Range.</p>	<p>The number of patients (from the Denominator) for whom height/length and weight have been recorded in a patient health assessment within the specified Date Range.</p>

Measure	Requirement	Denominator	Numerator
<p>Vital Signs (cont'd)</p> <p>Alternate measure for vital signs with height/length and weight exclusion</p>	<p>More than 50 percent of all unique patients seen by the EP during the EHR reporting period have blood pressure (for patients age 3 and over only) recorded as structured data (Optional effective 2013/ Required 2014).</p>	<p>The number of patients who are at least 3 years old and who have a patient health assessment, medical encounter, or dental procedure with one of the selected Providers and with a procedure date within the specified Date Range.</p>	<p>The number of patients (from the Denominator) who are at least 3 years old and for whom blood pressure has been recorded in a patient health assessment within the specified Date Range.</p>
<p>Smoking Status</p>	<p>More than 50 percent of all unique patients 13 years old or older seen by the EP have smoking status recorded as structured data.</p>	<p>The number of patients who are at least 13 years old and who have a patient health assessment, medical encounter, or dental procedure with one of the selected Providers and with a procedure date within the specified Date Range.</p>	<p>The number of patients (from the Denominator) who have a smoking status set.</p>
<p>VDT - View, Download, or Transmit Health Information</p> <p>Measure A</p>	<p>More than 50 percent of all unique patients seen by the EP during the EHR reporting period are provided timely (available to the patient within 4 business days after the information is available to the EP) online access to their health information subject to the EP's discretion to withhold certain information.</p>	<p>The number of unique patients who were seen by n EP within the specified Date Range.</p>	<p>The number of patients (from the Denominator) who have timely (within 4 business days after the information is available to the EP) online access to their health information.</p>

Measure	Requirement	Denominator	Numerator
VDT - View, Download, or Transmit Health Information (cont'd) Measure B	More than 5 percent of all unique patients seen by the EP during the EHR reporting period (or their authorized representatives) view, download, or transmit to a third party their health information.	The number of unique patients who were seen by n EP within the specified Date Range.	The number of unique patients, or their authorized representatives, (from the Denominator) who have viewed online, downloaded, or transmitted the patient's health information to a third party.
Clinical Summary	Clinical summaries provided to patients for more than 50 percent of all office visits within 3 business days.	The number of office visits that were performed by the EP within the specified Date Range.	The number of office visits (from the Denominator) for which the corresponding patient was provided a clinical summary within three business days.
Summary Of Care Measure A	The EP that transitions or refers their patient to another setting of care or provider of care provides a summary of care record for more than 50 percent of transitions of care and referrals during the EHR reporting period.	Number of transitions of care and referrals for which the EP was the transferring or referring provider within the specified Date Range.	The number of transitions of care and referrals (from the Denominator) where a summary of care record was provided electronically.
Patient Reminders	More than 20 percent of all unique patients 65 years or older or 5 years old or younger were sent an appropriate reminder during the EHR reporting period.	The number of patients who are 5 years old or younger or who are 65 years old or older. If the EP does not have any patients that meet the age criteria, that EP is excluded from the requirement (the EP must select No next to the appropriate exclusion and then click Apply to attest to the exclusion).	The number of patients (from the Denominator) that were sent the appropriate reminder.

Measure	Requirement	Denominator	Numerator
Patient Education	More than 10 percent of all unique patients seen by the EP during the EHR reporting period are provided patient-specific education resources.	The number of patients who were seen by the EP within the specified Date Range.	The number of patients (from the Denominator) who were provided patient-specific education resources.
Medication Reconciliation	The EP performs medication reconciliation for more than 50 percent of transitions of care in which the patient is transitioned into the care of the EP.	The number of transitions of care within the specified Date Range for which the EP was the receiving party of the transition. If an EP was not on the receiving end of any transition of care within the specified Date Range, that EP is excluded from the requirement (the EP must select No next to the appropriate exclusion and then click Apply to attest to the exclusion).	The number of transitions of care (from the Denominator) where medication reconciliation was performed.

Stage 2

Measure	Requirement	Denominator	Numerator
Demographics	More than 80 percent of all unique patients seen by the EP have demographics recorded as structured data.	The number of patients who were seen by one of the selected Providers within the specified Date Range.	The number of patients (from the Denominator) who have data in their records for all the required demographics (including any specific exclusions if the patient declined to provide that information or if recording that element is contrary to state law).

Measure	Requirement	Denominator	Numerator
Computerized Provider Order Entry (CPOE) - Medications	More than 60 percent of medication orders created by the EP during the EHR reporting period are recorded using computerized provider order entry.	The number of prescriptions that were ordered by one of the selected Providers within the specified Date Range.	The number of prescriptions (from the Denominator) that were ordered using CPOE by one of the selected Providers within the specified Date Range.
Computerized Provider Order Entry (CPOE) - Laboratory	More than 30 percent of laboratory orders created by the EP during the EHR reporting period are recorded using computerized provider order entry.	The number of laboratory orders that were created by an EP and that have an order date that is within the specified Date Range.	The number of laboratory orders (from the Denominator) that were recorded using CPOE and that have an order date that is within the specified Date Range.
Computerized Provider Order Entry (CPOE) - Radiology	More than 30 percent of radiology orders created by the EP during the EHR reporting period are recorded using computerized provider order entry.	The number of radiology orders that were created by an EP and that have a creation date that is within the specified Date Range.	The number of radiology orders (from the Denominator) that were recorded using CPOE and that have a creation date that is within the specified Date Range.
Electronic Prescribing (eRx)	More than 50 percent of all permissible prescriptions, or all prescriptions written by the EP are queried for a drug formulary and transmitted electronically using Certified EHR Technology.	The number of prescriptions written by one of the selected Providers (except for OTC drugs and controlled substances) within the specified Date Range.	The number of prescriptions (from the Denominator) that were queried for a drug formulary and transmitted electronically.

Measure	Requirement	Denominator	Numerator
<p>Vital Signs</p> <p>No vital sign exclusions</p>	<p>More than 80 percent of all unique patients seen by the EP during the EHR reporting period have blood pressure (for patients age 3 and over only) and height/length and weight (for all ages) recorded as structured data.</p>	<p>The number of patients who have a patient health assessment, medical encounter, or dental procedure with one of the selected Providers and with a procedure date within the specified Date Range.</p>	<p>The number of patients (from the Denominator) who are at least 3 years old and for whom height/length, weight, and blood pressure have been recorded in a patient health assessment within the specified Date Range; and the number of patients younger than 3 years of age for whom height/length and weight have been recorded in a patient health assessment within the specified Date Range.</p>
<p>Blood pressure exclusion</p>	<p>More than 80 percent of all unique patients seen by the EP during the EHR reporting period have height/length and weight (for all ages) recorded as structured data.</p>	<p>The number of patients who have a patient health assessment, medical encounter, or dental procedure with one of the selected Providers and with a procedure date within the specified Date Range.</p>	<p>The number of patients (from the Denominator) for whom height/length and weight have been recorded in a patient health assessment within the specified Date Range.</p>
<p>Height/length and weight exclusion</p>	<p>More than 80 percent of all unique patients seen by the EP during the EHR reporting period have blood pressure (for patients age 3 and over only) recorded as structured data.</p>	<p>The number of patients who are at least 3 years old and who have a patient health assessment, medical encounter, or dental procedure with one of the selected Providers and with a procedure date within the specified Date Range.</p>	<p>The number of patients (from the Denominator) who are at least 3 years old and for whom blood pressure has been recorded in a patient health assessment within the specified Date Range.</p>

Measure	Requirement	Denominator	Numerator
Smoking Status	More than 80 percent of all unique patients 13 years old or older seen by the EP have smoking status recorded as structured data.	The number of patients who are at least 13 years old and who have a patient health assessment, medical encounter, or dental procedure with one of the selected Providers and with a procedure date within the specified Date Range.	The number of patients (from the Denominator) who have a smoking status set.
VDT - View, Download, or Transmit Health Information Measure A Measure B	More than 50 percent of all unique patients seen by the EP during the EHR reporting period are provided timely (available to the patient within 4 business days after the information is available to the EP) online access to their health information subject to the EP’s discretion to withhold certain information. More than 5 percent of all unique patients seen by the EP during the EHR reporting period (or their authorized representatives) view, download, or transmit their health information to a third party.	The number of unique patients who were seen by n EP within the specified Date Range. The number of unique patients who were seen by n EP within the specified Date Range.	The number of patients (from the Denominator) who have timely (within 4 business days after the information is available to the EP) online access to their health information. The number of unique patients, or their authorized representatives, (from the Denominator) who have viewed online, downloaded, or transmitted the patient’s health information to a third party.

Measure	Requirement	Denominator	Numerator
Clinical Summary	Clinical summaries provided to patients or patient-authorized representatives within 1 business day for more than 50 percent of office visits during the EHR reporting period.	The number of office visits conducted by the EP within the specified Date Range.	The number of office visits (from the Denominator) where the patient or a patient-authorized representative is provided a clinical summary of the patient's visit within 1 business day (or patient declined clinical summary).
Patient Reminders	More than 10 percent of all unique patients who have had two or more office visits for preventive or follow-up care with the EP within the 24 months before the beginning of the EHR reporting period were sent a reminder per patient preference (if available).	The number of unique patients who have had two or more office visits with an EP in the 24 months prior to the beginning of the specified Date Range. Exclusion: A unique patient with less than two office visits with the EP in the 24 months prior to the beginning of the specified Date Range.	The number of patients (from the Denominator) who were sent a reminder per patient preference (if available) within the specified Date Range.
Patient Education	Patient-specific education resources identified by Certified EHR Technology are provided to patients for more than 10 percent of all unique patients with office visits seen by the EP during the EHR reporting period.	The number of unique patients with office visits who were seen by the EP within the specified Date Range.	The number of patients (from the Denominator) who were provided patient-specific education resources identified by the EHR technology.

Measure	Requirement	Denominator	Numerator
Medication Reconciliation	The EP performs medication reconciliation for more than 50 percent of transitions of care in which the patient is transitioned into the care of the EP during the EHR reporting period.	The number of transitions of care (defined as first encounters with a new patient and encounters with existing patients where a summary of care record of any type is provided to the receiving provider as a hard copy, scanned copy, or electronic C-CDA) for which the EP was the receiving party of the transition within the specified Date Range.	The number of transitions of care (from the Denominator) where medication reconciliation was performed.
Summary Of Care Measure A	The EP that transitions or refers their patient to another setting of care or provider of care provides a summary of care record for more than 50 percent of transitions of care and referrals during the EHR reporting period.	Number of transitions of care and referrals for which the EP was the transferring or referring provider within the specified Date Range.	The number of transitions of care and referrals (from the Denominator) where a summary of care record was provided electronically.

Measure	Requirement	Denominator	Numerator
<p>Summary Of Care (cont'd)</p> <p>Measure B</p>	<p>The EP that transitions or refers their patient to another setting of care or provider of care provides a summary of care record for more than 10 percent of such transitions and referrals during the EHR reporting period either: (a) electronically transmitted using Certified EHR Technology to a recipient; or (b) where the recipient receives the summary of care record via an exchange facilitated by an organization that is a Nationwide Health Information Network (NwHIN) Exchange participant or in a manner that is consistent with the governance mechanism ONC establishes for the NwHIN.</p>	<p>The number of transitions of care and referrals for which the EP was the transferring or referring provider within the specified Date Range.</p>	<p>The number of transitions of care and referrals (from the Denominator) where the recipient receives the summary of care record electronically—via an exchange facilitated by an organization that is a NwHIN Exchange participant, or in a manner that is consistent with the governance mechanism ONC establishes for the nationwide health information network.</p>
<p>Secure Electronic Messaging</p>	<p>A secure message was sent using the electronic messaging function of Certified EHR Technology by more than 5 percent of unique patients (or their authorized representatives) seen by the EP during the EHR reporting period.</p>	<p>The number of unique patients who were seen by an EP within the specified Date Range.</p>	<p>The number of patients or patient-authorized representatives (from the Denominator) who send a secure electronic message to the EP.</p>

Measure	Requirement	Denominator	Numerator
Electronic Notes	Enter at least one electronic progress note created, edited, and signed by an EP for more than 30 percent of unique patients with at least one office visit during the EHR reporting period. The text of the electronic note must be text-searchable and may contain drawings and other content.	Number of unique patients with at least one office visit with EPs with the specified Date Range.	The number of unique patients (from the Denominator) who have at least one electronic progress note from an eligible professional recorded as text-searchable data.
Family Health History	More than 20 percent of all unique patients seen by the EP during the EHR reporting period have a structured data entry (health history or unknown) for one or more first-degree relatives (parents, siblings, and children).	Number of unique patients seen by the EP within the specified Date Range.	The number of patients (from the Denominator) with a structured data entry (health history or unknown) for one or more first-degree relatives.

Modified Stage 2

Measure	Requirement	Denominator	Numerator
Computerized Provider Order Entry (CPOE) - Medications	More than 60 percent of medication orders created by the EP during the EHR reporting period are recorded using computerized provider order entry.	The number of prescriptions that were ordered by one of the selected Providers within the specified Date Range.	The number of prescriptions (from the Denominator) that were ordered using CPOE by one of the selected Providers within the specified Date Range.
Computerized Provider Order Entry (CPOE) - Laboratory	More than 30 percent of laboratory orders created by the EP during the EHR reporting period are recorded using computerized provider order entry.	The number of laboratory orders that were created by an EP and that have an order date that is within the specified Date Range.	The number of laboratory orders (from the Denominator) that were recorded using CPOE and that have an order date that is within the specified Date Range.

Measure	Requirement	Denominator	Numerator
Computerized Provider Order Entry (CPOE) - Radiology	More than 30 percent of radiology orders created by the EP during the EHR reporting period are recorded using computerized provider order entry.	The number of radiology orders that were created by an EP and that have a creation date that is within the specified Date Range.	The number of radiology orders (from the Denominator) that were recorded using CPOE and that have a creation date that is within the specified Date Range.
Electronic Prescribing (eRx)	More than 50 percent of all permissible prescriptions, or all prescriptions written by the EP are queried for a drug formulary and transmitted electronically using Certified EHR Technology.	The number of prescriptions written by one of the selected Providers (except for OTC drugs and controlled substances) within the specified Date Range.	The number of prescriptions (from the Denominator) that were queried for a drug formulary and transmitted electronically.
<p>VDT</p> <p>Measure A - Timely Online Access</p> <p>Measure B - View, Download, or Transmit Health Information</p>	<p>More than 50 percent of all unique patients seen by the EP during the EHR reporting period are provided timely (available to the patient within 4 business days after the information is available to the EP) online access to their health information subject to the EP's discretion to withhold certain information.</p> <p>At least one patient seen by the EP during the EHR reporting period (or their authorized representative) views, downloads, or transmits their health information to a third party.</p> <p>Yes or No answer.</p>	<p>The number of unique patients who were seen by n EP within the specified Date Range.</p> <p>The number of unique patients who were seen by n EP within the specified Date Range.</p>	<p>The number of patients (from the Denominator) who have timely (within 4 business days after the information is available to the EP) online access to their health information.</p> <p>The number of unique patients, or their authorized representatives, (from the Denominator) who have viewed online, downloaded, or transmitted the patient's health information to a third party.</p>

Measure	Requirement	Denominator	Numerator
Patient Education	Patient-specific education resources identified by Certified EHR Technology are provided to patients for more than 10 percent of all unique patients with office visits seen by the EP during the EHR reporting period.	The number of unique patients with office visits who were seen by the EP within the specified Date Range.	The number of patients (from the Denominator) who were provided patient-specific education resources identified by the EHR technology.
Medication Reconciliation	The EP performs medication reconciliation for more than 50 percent of transitions of care in which the patient is transitioned into the care of the EP during the EHR reporting period.	The number of transitions of care (defined as first encounters with a new patient and encounters with existing patients where a summary of care record of any type is provided to the receiving provider as a hard copy, scanned copy, or electronic C-CDA) for which the EP was the receiving party of the transition within the specified Date Range.	The number of transitions of care (from the Denominator) where medication reconciliation was performed.

Measure	Requirement	Denominator	Numerator
Summary Of Care	<p>The EP that transitions or refers their patient to another setting of care or provider of care provides a summary of care record for more than 10 percent of such transitions and referrals during the EHR reporting period (or 5 percent if the reporting period is in 2017). The provider of care must (1) use a Certified EHR Technology to create a summary of care record; and (2) electronically transmit such summary of care record to a receiving provider.</p>	<p>The number of transitions of care and referrals for which the EP was the transferring or referring provider within the specified Date Range.</p>	<p>The number of transitions of care and referrals (from the Denominator) where the summary of care record is created using a Certified EHR Technology and electronically transmitted.</p>
Secure Electronic Messaging	<p>For at least one patient seen by the EP during an EHR reporting period in 2016 (or 5 percent if the report period is in 2017), a secure message was sent to the patient either: (a) using the electronic messaging function of a Certified EHR Technology; or (b) in response to a secure message sent by the patient.</p> <p>Yes or No answer.</p>	<p>The number of unique patients who were seen by an EP within the specified Date Range.</p>	<p>The number of patients (from the Denominator) who were sent a secure electronic message.</p>

Modified Stage 3

Measure	Requirement	Denominator	Numerator
Computerized Provider Order Entry (CPOE) - Medications	More than 60 percent of medication orders created by the EP during the EHR reporting period are recorded using computerized provider order entry.	The number of prescriptions that were ordered by one of the selected Providers within the specified Date Range.	The number of prescriptions (from the Denominator) that were ordered using CPOE by one of the selected Providers within the specified Date Range.
Computerized Provider Order Entry (CPOE) - Laboratory	More than 60 percent of laboratory orders created by the EP during the EHR reporting period are recorded using computerized provider order entry.	The number of laboratory orders that were created by an EP and that have an order date that is within the specified Date Range.	The number of laboratory orders (from the Denominator) that were recorded using CPOE and that have an order date that is within the specified Date Range.
Computerized Provider Order Entry (CPOE) - Radiology/ Diagnostic Imaging	More than 60 percent of diagnostic imaging orders created by the EP during the EHR reporting period are recorded using computerized provider order entry.	The number of diagnostic imaging orders that were created by an EP and that have a creation date that is within the specified Date Range.	The number of diagnostic imaging orders (from the Denominator) that were recorded using CPOE and that have a creation date that is within the specified Date Range.
Electronic Prescribing (ePrescribing)	More than 60 percent of all permissible prescriptions written by the EP are queried for a drug formulary and transmitted electronically using Certified EHR Technology.	The number of prescriptions written by one of the selected Providers (except for OTC drugs and controlled substances) within the specified Date Range.	The number of prescriptions (from the Denominator) that were queried for a drug formulary and transmitted electronically.

Measure	Requirement	Denominator	Numerator
Patient Electronic Access	<p>For more than 80 percent of all unique patients seen by the EP during the EHR reporting, (1) the patient (or the patient-authorized representative) is provided timely (available to the patient within 48 hours after the information is available to the EP) access to view online, download, and transmit their health information; and (2) the provider ensures the patient's health information is available for the patient (or patient-authorized representative) to access using any application of their choice that is configured to meet the technical specifications of the API in a Certified EHR Technology.</p>	<p>The number of unique patients who were seen by n EP within the specified Date Range.</p>	<p>The number of patients, or their authorized representatives, (from the Denominator) who have timely (within 48 hours after the information is available to the EP) online access to their health information, or who have access to their health information through an application that uses the API for a Certified EHR Technology.</p>


Measure	Requirement	Denominator	Numerator
View, Download, or Transmit	More than 10 percent of all unique patients (or their authorized representatives) seen by the EP during the EHR reporting period actively engage with the electronic health record made accessible by the provider and either: (1) views, downloads, or transmits to a third- party their health information; or (2) accesses their health information through the use of an API that can be used by applications chosen by the patient and configured to the API in a Certified EHR Technology; or (3) does a combination of (1) and (2).	The number of unique patients who were seen by n EP within the specified Date Range.	The number of unique patients, or their authorized representatives, (from the Denominator) who have viewed online, downloaded, or transmitted to a third party the patient's health information; who have accessed their health information through an API; or both.
Patient Education	For more than 35 percent of all unique patients with office visits seen by the EP during the EHR reporting period, patient-specific education resources identified by a Certified EHR Technology are provided to patients.	The number of unique patients with office visits who were seen by the EP within the specified Date Range.	The number of patients (from the Denominator) who were provided patient-specific education resources identified by a Certified EHR Technology.

Measure	Requirement	Denominator	Numerator
Medication/ Clinical Information Reconciliation	For more than 80 percent of transitions or referrals received and patient encounters in which the provider has never before encountered the patient, the EP performs a clinical information reconciliation for the following three clinical information sets: (a) a review of the patient’s medications, including the name, dosage, frequency, and route of each medication; (b) a review of the patient’s known medication allergies; and (c) a review of the patient’s current and active diagnoses.	Within the specified Date Range, the number of transitions of care or referrals received for which the EP was the receiving party, and the number of the EP’s first encounters (encounters with a new patient).	The number of transitions of care (from the Denominator) where medication and clinical information reconciliation was performed.
Transitions of Care	For more than 50 percent of the transitions to another setting of care or referrals to another provider of care during the EHR reporting period, the EP transitioning or referring their patients (1) creates a summary of care record using a Certified EHR Technology; and (2) electronically exchanges such summary of care record.	The number of transitions of care and referrals for which the EP was the transferring or referring provider within the specified Date Range.	The number of transitions of care and referrals (from the Denominator) where the summary of care record is created using a Certified EHR Technology and electronically exchanged.

Measure	Requirement	Denominator	Numerator
Secure Messaging	For more than 25 percent of all unique patients seen by the EP during the EHR reporting period, a secure message was sent to the patient (or their authorized representative) either: (a) using the electronic messaging function of a Certified EHR Technology; or (b) in response to a secure message sent by the patient (or their authorized representative).	The number of unique patients who were seen by an EP within the specified Date Range.	The number of patients (from the Denominator) who were sent a secure electronic message.
Patient Generated Health Data	For more than 5 percent of all unique patients seen by the EP during the EHR reporting period, patient-generated health data or data from a non-clinical setting is incorporated into a Certified EHR Technology.	The number of unique patients who were seen by an EP within the specified Date Range.	The number of patients (from the Denominator) who had health data from patient-generated or non-clinical sources incorporated into a Certified EHR Technology.
Receive and Incorporate	For more than 40 percent of transitions or referrals received and patient encounters in which the provider has never before encountered the patient, the EP incorporates into the patient's EHR an electronic summary of care document.	The number of transitions of care or referrals received by the EP, and the number of patient encounters in which the provider has never before encountered the patient, within the specified Date Range.	The number of electronic summary of care documents incorporated into patient records.

Medical Code List

The Medical Code List allows you to view and print the medical codes entered in Dentrix Enterprise. Codes are grouped by code type (AMA, ICD, Modifier, Place of Service, and Type of Service).

	<p>Why: To ensure medical codes are up to date, and to view the ICD-9-CM codes associated with each AMA CPT code</p> <p>When: After Dentrix Enterprise setup, and as needed</p>
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MEDICAL CODE LIST - AMA CPT CODES Ⓐ	
The Dentist Group	
Date: 04/23/2018	Page: 1
CODE	DESCRIPTION
INCLUDED ICD-9-CM CODES	
473.0	Chr Maxillary Sinusitis
	053.12 Postherpes Trigem Neural
	053.13 Postherpes Polyneuropath
	053.19 H ZosterNerv Syst NEC
478.22	Parapharyngeal Abscess
478.24	Retropharyngeal Abscess

MEDICAL CODE LIST - ICD-9-CM DIAGNOSTIC CODES Ⓒ	
The Dentist Group	
Date: 04/23/2018	Page: 2
CODE	DESCRIPTION
053.12	Postherpes Trigem Neural
053.13	Postherpes Polyneuropath
053.19	H ZosterNerv Syst NEC

MEDICAL CODE LIST - MODIFIER CODES Ⓓ	
The Dentist Group	
Date: 04/23/2018	Page: 3
CODE	DESCRIPTION
21	Prolonged Evaluation and Management Service
22	Unusual Procedural Services
23	Unusual Anesthesia

MEDICAL CODE LIST - PLACE OF SERVICE Ⓔ	
The Dentist Group	
Date: 04/23/2018	Page: 4
CODE	DESCRIPTION
11	Office
12	Home
13	Mobile Unit

MEDICAL CODE LIST - TYPE OF SERVICE	
The Dentist Group	
Date: 04/23/2018	Page: 5
CODE	DESCRIPTION
0	Whole blood or packed red cells
1	Medical Care
2	Surgery

How do I run the Medical Code List?

From the DXOne Reporting module, select **Reference**, and then double-click **Medical Code List**. For additional details about running this report, see the “Medical Code List” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The following report information is found in the **Medical/Cross Code Setup** dialog box, which can be accessed in the Office Manager. See the “Adding, editing, and deleting medical codes” topic in the Office Manager portion of the Dentrix Enterprise Help for details on how to edit codes listed on this report.

A. AMA CPT Codes – If you select **AMA CPT** when setting options for this report, AMA CPT codes appear on the report.

B. Included ICD-9-CM Codes – If you select **List Included ICD-9-CM** when setting options for this report, the ICD-9 codes associated with each AMA CPT code appear on the report.

C. ICD-9 Codes – If you select **ICD-9-CM** when setting options for this report, ICD-9 codes appear on the report.

D. Modifier Codes – If you select **Modifier** when setting options for this report, Modifier codes appear on the report.

E. Place of Service – If you select **Place of Service** when setting options for this report, Place of Service codes appear on the report.

F. Type of Service – If you select **Type of Service** when setting options for this report, Type of Service codes appear on the report.

Code Setup Cross Code Setup		
Code Types	Code	Description
AMA-CPT (A)	0004F	Tobacco Counseling
AMA-CPT Modifiers (D)	01995	Anes-IV Local Upper/Lower Ext
CPT-Place Of Service (E)	10060	Drain Skin Abscess
CPT-Type Of Service (F)	10061	Drain Skin Abscess
ICD-10-CM	10120	Remove Foreign Body
ICD-9-CM (C)	10121	Remove Foreign Body
	10140	Drain Hematoma/Fluid
	10160	Puncture Drain Lesion
	10180	Complex Drainage Wound
	11040	Debride Skin Partial
	11041	Debride Skin Full
	11042	Debride Skin/Tissue
	11043	Debride Tissue/Muscle
	11044	Debride Tissue/Muscle/Bone
	11100	Biopsy Skin Lesion
	11101	Biopsy Skin Lesion Add-On

Multi-Code List

The Multi-Code List allows you to view and print the multi-codes entered in Dentrix Enterprise.

Why: To ensure treatment planning services that require multiple steps/appointments (for example, dentures) have multi-codes that have been setup properly, to ensure each multi-code contains the proper procedure codes, and to ensure each multi-code reserves a proper length of time in the Appointment Book

When: After Dentrix Enterprise setup, and as needed

MULTI-CODE LIST								
The Dentist Group								
Date: 04/22/2018								Page: 1
CODE	DESCRIPTION PROC/DIAG	ABBREV DESC DESCRIPTION	UNITS	CODE TYPE	APPT TYPE	ENABLED	PERMANENT	
xx111	Crn, Pst & Core, Insert D2752 D2954 D2761 D5-10578 D5-10002 F-A3610	CrnPcIns Crown-porc fused noble metal Prefab post&core in add to crn Crown Insert Tooth Sensitivity Tooth Disorder NOS Facial Nerve Function NOS	31	Standard	High Production	YES	NO	
xx2sA	DO Amalgam, permanent D2150 OD	DO Amalg. Amalgam-2 surf. prim/perm	3	Standard	High Production	YES	NO	
xx2sC	DO Composite, post-permanent D2386 OD	DO Comp. Resin-2 surface, post-permanent	3	Standard	High Production	YES	NO	
xx3sA	MOD Amalgam D2160 MOD	MOD Amal Amalgam-3 surf. prim/perm	4	Standard	High Production	YES	NO	
xx3sC	MOD Composite, post-permanent D2387 MOD	MOD Comp Resin-3 surface +, post-perm	4	Standard	High Production	YES	NO	
xxBRG	Bridge D6240 MOD D6750 MOD	Bridge Pontic - Pontic-porcelain fused to hnob Retainer-Crown - Retainer crn-porc fused-hi nob	4	Bridge	High Production	YES	NO	
xxCCA	Cont. Care - Prophy, Adult D1110 D0120 D0274	CCAdult Prophylaxis-adult Periodic oral evaluation Bitewings-four films	6	Standard	Low Production	YES	NO	
xxCCP	Cont. Care - Prophy, Child D0120 D1120 D0272	CCChild Periodic oral evaluation Prophylaxis-child Bitewings-two films	3	Standard	High Production	YES	NO	
xxCIm	Crown/Implant D6010 D2750	CrnImp Surg place implant: endosteal Crown-porc fuse high noble mtl	28	Standard	High Production	YES	NO	
xxNPX	New Patient Exam D0150 D1110 D0274 D0210	NP Ex Comp oral eval-new/estab pat Prophylaxis-adult Bitewings-four films Intraoral-complete series (bw)	9	Standard	Low Production	YES	NO	
xxOAM	O Amalgam, permanent D2140 O	Oamalg Amalgam-1 surf. prim/perm	5	Standard	High Production	YES	NO	
xxORS	O Resin, post-perm D2385 O	Oresin Resin-1 surface, post-permanent	6	Standard	High Production	YES	NO	
xxPDX	Partial Mand D5214 15101	PartMand Mand partial-metal base w/sdls Missing tooth	10	Standard	High Production	YES	NO	
xxPex	Initial Perio Exam D0150 D0210 D4341 D4341	PerioExam Comp oral eval-new/estab pat Intraoral-complete series (bw) Perio scale&root pln-4+per quad Perio scale&root pln-4+per quad	5	Standard	High Production	YES	NO	



How do I run the Multi-Code List?

In the Office Manager, from the **Reports** menu, point to **Reference**, and then click **Multi-Code List**. For step-by-step instructions on how to run this report, see the "Multi-Code List" topic in the Office Manager portion of the Dentrix Enterprise Help.

What important information does this report provide?

The following report information (with the exception of letter F) is found in the **Multi-Code Editor** dialog box, which can be accessed in the Office Manager. See the "Multi-Code Setup" topic in the Office Manager portion of the Dentrix Enterprise Help for information about how to edit multi-codes.

- A. Codes** – The multi-code's code.
- B. Description** – The multi-code description.
- C. Units** – The units of time reserved for the multi-code when the code is scheduled in the Appointment Book.
- D. Code Type** – The multi-code type (i.e. Standard or Bridge).
- E. Enabled** – Indicates whether or not the multi-code is enabled for selection when posting a procedure.
- F. Permanent** – Due to the 2004 ADA code update, the data in this column is no longer relevant. All codes should have a "No."

The screenshot shows the Multi-Code Editor dialog box. It contains the following fields and controls:

- Multi-Code:** Description: Crn, Pst & Core, Insert (Callout B)
- Multi-Code:** xx111 (Callout A) Abbrev. Desc.: CrnPCIns
- Appointment Type:** High Production (dropdown menu)
- Procedure Time:** 31 >> Unit(s) (Callout C)
- Type:** Standard (selected radio button), Bridge (Callout D)
- Code List Table:**

Code	Description
*D2752	Crown-porc fused noble metal
*D2954	Prefab post&core in add to crn
*D2761	Crown Insert
*D5-10578	Tooth Sensitivity
*D5-10002	Tooth Disorder NOS
*F-A3610	Facial Nerve Function NOS
- Buttons:** Add, Edit, Delete
- Footer:** *Procedure requires treatment information when used. Disable This Multi-Code (Callout E), OK, Cancel

New Patient List

The New Patient List displays patients whose first visit date falls within a selected date range.

Why: To view how many new patients the practice has acquired, to keep track of how many new patients went inactive, to keep track of how many new patients were archived, and to view the total number of non-patients that had an appointment within the date range

When: Yearly and monthly

NEW PATIENT LIST (STANDARD LIST)					
PMTS - DENTRIX DENTAL SYSTEMS					
01/16/2017 - 12/23/2017					
Date:	01/18/2018			Page:	1
PATIENT NAME	FIRST VISIT DATE	FIRST PROCEDURE	PROVIDER	PATIENT STATUS	REFERRED BY
Crosby, Brent A 1234 Farmington Ave Buffalo, NY 14223	11/18/2017	11/18/2017	DR10	Non-Patient	Yellow Page Ad 06/23/2017
Crosby, Patricia 1234 Anita Court Hebron, KY 41840	06/09/2017	06/23/2017	DR10	Patient	Busman, James C 06/09/2017
Hansens, Corey 123 S. Meadow Mist Kailua, TN 77301	06/24/2017	06/24/2017	DR10	Patient	Baber, Brenda 06/23/2017
Keeler, Rachel 123 N. Saddleback Dr. Orem, UT 84007	02/22/2017	03/27/2017	DR10	Inactive	Direct Mail 1 02/22/2017
Myers, Patrick 123 W. 1600 N Orem, UT 84057	03/03/2017	03/03/2017	DR10	Patient	Yellow Page Ad 03/03/2017
Olsen, Paul 1234, Teakwood, Dr Kannapolis, WA 20007	04/30/2017	04/30/2017	DR10	Patient	Yellow Page Ad 06/23/2017
Perkins,, Shelly, M 12345 N. Dearborn Rd Hinkley, MI 47841	10/04/2017	10/04/2017	DR10	Patient	O'Neal, Thomas J. 06/23/2017
Reeves, Elizabeth 123 Utah Valley Drive American Fork, UT 84003	11/03/2017	11/05/2017	DR10	Patient	MULTIPLE 11/05/2017
Taylor, Mark E 12345 Queens Blvd Stamford, CT 06903	09/12/2017	09/12/2017	DR20	Archived	
Winters, Carl 123 Utah Valley Drive Apt.50 American Fork, UT 84003	11/06/2017	11/11/2017	DR20	Patient	Brackett, DMD 11/06/2017
				(A)	(B)
				(C)	
				(D)	
TOTAL ACTIVE NEW PATIENTS: TOTAL INACTIVE NEW PATIENTS: TOTAL "NON-PATIENT" NEW PATIENTS: TOTAL ARCHIVED NEW PATIENTS: TOTAL NEW PATIENTS:					7 1 1 1 10

How do I run the New Patient List?

In the Office Manager, from the **Reports** menu, point to **Lists**, and then click **New Patient List**. For additional details about running this report, see the “New Patient List” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The information for letters A and C are found in the **Patient Information** dialog box, which can be accessed by double-clicking the Patient Information block in the Family File.

A. First Visit Date – The patient’s first appointment date. This report can be sorted by the **First Visit Date**.

B. First Procedure Date – The date of the patient’s first completed procedure.

C. Patient Status – The patient’s status.

D. Totals

- **Total Active New Patients** – The total number of new patients that are still active.
- **Total Inactive New Patients** – The total number of new patients that are now inactive.
- **Total “Non-Patient” New Patients** – The total number of “non-patients” that came in for an appointment. Patients that were changed from a non-patient status to a patient status.
- **Total Archived New Patients** – The total number of new patients that are now archived.
- **Total New Patients** – The total number of new patients.

Office Journal Report

The Office Journal Report itemizes each Office Journal correspondence by date, time, medium, provider, type of service rendered, or transaction made. This report can be run for a patient, provider, or referral provider.



Why: To view Office Journal history

When: As needed

Office Journal		Date: 05/13/2018 Page: 1
Patient: Abbott, James S[Jim]		
05/13/2018		
Appointment: Date: 05/13/2018, Time: 1:00:00 PM, Provider: DDS1 PntcCtHNM#19, PntcCtHNM#20, PntcCtHNM#21, PntcCtHNM#22		
Reminder: reminder Date: 05/13/2018, Clinic: CENTRAL Reason: called to remind him of upcoming appt		
Phone: Post-op Date: 05/13/2018, Clinic: CENTRAL Reason: Checked in with patient - doing fine he says		
04/27/2018		
Appointment: Date: 04/27/2018, Time: 10:00:00 AM, Provider: DDS1 LwParMtBs#25*26		
04/24/2018		
Appointment: Date: 04/24/2018, Time: 9:10:00 AM, Provider: DDS1 CCAdult		
04/22/2018		
Broken Appointment Date: 04/22/2018, Provider: DDS1, Clinic: CENTRAL CCAdult, Pano, FabPtCr+B#5		
03/02/2018		
Appointment: Date: 03/02/2018, Time: 11:00:00 AM, Provider: DDS1 ExtEval		

How do I run the Office Journal Report?

In the Office Journal, from the **File** menu, click **Print**. For additional details about running this report, see the "Printing from the Office Journal" topic in the Office Journal portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The information displayed in this report is highly customizable and depends on the settings configured in the Office Journal. The following is a comprehensive list of possible data:

- HIPAA Privacy Entries
- Journal Entry Notes
- Miscellaneous Journal Entries
- Patient Archived Appointments
- Patient Billing Statements
- Patient Broken Appointments
- Patient Financing Requests
- Patient letters
- Patient Perio Letters
- Patient Purged Appointments
- Phone Calls
- Referral Gratuities
- Referral Recaps
- Referral Slips
- Reminders

Operator Day Sheet Report

The Operator Day Sheet Report lists financial transactions (charges, payments, credit adjustments, charge adjustments, and finance charges) that have been posted to the Ledger, as well as some patient and practice statistics.

\$	Why: To print a record of transactions for the current date When: Daily
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OPERATOR DAY SHEET(ENTERPRISE) ALPHABETICAL

Date: 04/27/2018

04/27/2018

Page: 1

ENTRY DATE	PROCEDURE DATE	PATIENT NAME	TH	CODE	DESCRIPTION	CHARGES	PAYMENTS	BT	PROV	CLINIC	CHART	ENC
04/27/2018	04/27/2018	Abbott, James			Insurance Payment		-698.40	2		CENT	ABB101	
04/27/2018	04/27/2018	Abbott, James	25*	D5214	Mand partial-metal base w/sdls	898.00		2	DDS1	CENT	ABB101	
04/27/2018	04/27/2018	Perkins, Shelly		D9110	Emerg treatment, palliative	0.00		1	DDS1	CENT		
04/27/2018	04/27/2018	Perkins, Shelly		D0330	Panoramic film	0.00		1	DDS1	CENT		
04/27/2018	04/27/2018	Perkins, Peggy			Cash Payment - Thank You		-100.00	1		CENT		
04/27/2018	04/27/2018	Reeves, Joshua			-Professional Discount		-25.00	1		CENT		
04/27/2018	04/27/2018	Smith, Michael		D9310	Consultation-per session	75.00		1	DDS0	CENT	SM0010	

A

B


GRAND TOTALS:

TOTAL CHARGES:	973.00	Check Payment - Thank You	0.00
MEDICAID CHARGES:	0.00	Cash Payment - Thank You	-100.00
TOTAL PAYMENTS:	-798.40	Credit Card Payment -Thank Y	0.00
INSURANCE PAYMENTS:	-698.40		
MEDICAID PAYMENTS:	0.00		
CREDIT ADJUSTMENTS:	-25.00		
CHARGE ADJUSTMENTS:	0.00		
FINANCE CHARGES:	0.00		
UNIQUE COUNTERS:			
ENCOUNTERS:	0		
PATIENTS:	5		
PATIENTS WITH MEDICAID:	0		

C

* Medicaid Insurance without a Medicaid Number
 --- Medicaid Number without Medicaid Insurance

How do I run the Operator Day Sheet Report?

From the Office Manager, click the Operator Day Sheet Report button  on the toolbar. To find out which button this is, see the “Using the Office Manager toolbar” topic in the Office Manager portion of the Dentrax Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Transactions – The transactions posted to the Ledger (including the patient’s name, procedure code and description, charge or payment, provider, and clinic).

B. Transaction Details – Each transaction provides the following additional information:

- **Entry Date** – The date a transaction is posted to the Ledger.
- **Procedure Date** – The date a procedure is posted to the Chart.

Note: It is essential that you understand the difference between Entry Dates and Procedure Dates. For details on these dates, see the Frequent Problems to Understanding Dentrax Reports section in the Introduction of this book.


- **TH** – The tooth number(s) associated with a procedure.
- **BT** – Billing type.

C. Grand Totals – The following information appears in the Grand Totals section for the current date:

- **Charges** – The total amount of the procedures posted, the amount of the procedures that were posted for patients with Medicaid (included in the total charges), and the total amount of the finance charges posted.
- **Payments** – The total amount of all payments made (the payments are broken down by type), and the amount of the payments made by Medicaid.
- **Adjustments** – The total credit and charge adjustments.
- **Statistics** – The number of unique encounters, patients, and number of patients with Medicaid (included in the Patients total) appear.


Operatory Appointment List Report


The Operatory Appointment List Report displays appointments scheduled each day and the operatories assigned to each appointment. Appointments are sorted by appointment time.




Why: To quickly view which operatory a patient is assigned to when the patient checks in
When: Daily

OPERATORY APPOINTMENT LIST (<ALL>) The Dentist Group Providers <ALL> - <ALL> Operatories <ALL> - <ALL> 01/01/2018 - 04/24/2018						
Date: 04/24/2018			Page: 1			
DATE	TIME	STATUS	PATIENT NAME	PROV/OP	APPT. REASON	LENGTH
01/08	1:00p		Abbott, James S	DDS1/DEF_OP1	CCAdult, ProphyAd	110m
01/09	11:00a	<CMPL>	Little, Brian R	DDS1/DEF_OP1	ResCmP2s#15	10m
01/09	11:00a	<CMPL>	Taylor, Mark	DDS1/DEF_OP2	Sealant#15, Sealant#18, Seal...	30m
01/09	11:00a	<CMPL>	Abbott, Shirley	DDS2/DEF_OP3	ExtErpTh#16, ExtErpTh#32, Ex...	50m
01/10	8:00a	NOansw	Brown, Mary	DDS1/DEF_OP1	ExtEval	10m
01/10	8:10a	NOansw	Johnson, Rachelle	DDS1/DEF_OP1	ProphyAd	50m
01/10	8:20a	NOansw	Crosby, Brent	DDS1/DEF_OP2	NutriCnsl	10m
01/10	8:30a	NOansw	Crosby, Shirley	DDS01/DEF_OP3	2BWX, LwParMtBs#25*26	50m
01/10	9:00a	NOansw	Little, Carol	DDS1/DEF_OP2	ExtEval	40m
01/10	1:00p	NOansw	Reeves, Elisabeth	DDS1/DEF_OP2	4BWX	10m
01/10	1:50p	NOansw	Reeves, Joshua	DDS1/DEF_OP1	FabPtCr+B#5	90m
01/10	2:00a	<CMPL>	Winters, Carl	DDS1/DEF_OP1	CCAdult, Pano, FabPtCr+B#5	80m







How do I run the Operatory Appointment List Report?

In the Office Manager, from the **Reports** menu, point to **Lists**, and then click **Daily Appointment List**. Ensure the **Operatory Appointment List** option is selected, and then click **OK**. For additional details about running this report, see the “Daily Appointment List” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).


What important information does this report provide?

- A. Time** – The appointment start time.
- B. Prov/Op** – The provider and operatory assigned to the appointment.
- C. Length** – The appointment length.

Oral Health Education Report

The Oral Health Education Report displays the percentage of oral health patients who received oral health education (determined by specified ADA and/or condition codes) at least once during a specified time frame.

For example, you may want to track patients who received a comprehensive oral exam (ADA code D0150) or a periodic recall oral evaluation (ADA code D0120)—the denominator codes—and then received oral hygiene instructions (ADA code D1330) or tobacco counseling (ADA code D1320)—the numerator codes.



Why: To view statistics regarding the oral health education of patients
When: Yearly

Percent of Patients Who Have Received Oral Health Education			
Date Range: 5/14/2018 - 5/14/2018 - Procedure Date			
Clinics: <ALL>			
Age Range: All Patients			
Providers: <ALL>			
<div style="display: flex; justify-content: space-around; align-items: center;"> A <div style="background-color: #ccc; padding: 2px;">Numerator Codes: D1330</div> B </div> <div style="display: flex; justify-content: space-around; align-items: center; margin-top: 5px;"> <div style="background-color: #ccc; padding: 2px;">Denominator Codes: D0120</div> </div>			
Report Date: 5/14/2018 Page 1 of 1			
Clinic			
Provider	Numerator	Denominator	Percent
Patient Name	Chart	Procedure Codes	
CENTRAL	3	2	150.00%
DESMITH	2	1	200.00%
Abbott, Jan	AB32	Numerator: D1330	
Crosby, Tom	CR95	Numerator: D1330 Denominator: D0120	
DSMITH	1	0	0.00%
Crosby, Shirley	CR94	Numerator: 1330	
MHAYES	0	1	0.00%
Winters, Jillian	WI213	Denominator: D0120	
Totals:	3	2	150.00%

How do I run the Oral Health Education Report?

From DXOne Reporting, select **Lists**, and then double-click **Oral Health Education**. For additional details about running this report, see the "Oral Health Education Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report contains the following information:

- A. Numerator** – The specified ADA codes and/or conditions.
- B. Denominator** – The specified ADA codes and/or conditions.
- C. Clinic Totals** – The Numerator, Denominator, and Percent totals for the providers at a given clinic on the report.
- D. Provider Totals** – The Numerator, Denominator, and Percent totals for a given provider who is attached to the Numerator and/or Denominator codes.
- E. Details** – If you select **Include Details** when setting options for this report, patient names, chart numbers, and procedures codes (numerators and denominators) appear on the report.
- F. Totals** – The Numerator, Denominator, and Percent grand totals for all clinics on the report.

Patient Chart and Progress Notes Printout

The Patient Chart and Progress Notes Printout allows you to print a patient's graphical chart and progress notes.



Why: To print a patient's dental chart and progress notes as a clinical record for the patient

When: As needed

Patient Progress Notes

Patient: James S. Abbott
Birthdate: 11/11/1960
Provider: Dennis Smith
Phone: (480)555-6525
Office: 1234 South Pine
 Mesa, AZ 85210

Date: 05/13/2018
Chart #: ABB101
SS#: 000-00-0000

Progress Notes

Date	Tooth	Surf	Proc	Prov	Description	Stat	AP	Amount
10/15/2016	14	MOD	D2160	DDS2	Amalgam-3 surf. prim/perm	C		90.00
10/15/2016	16		D7110	DDS1	Extraction-single tooth	C		71.00
07/07/2017			D1110	DROBB	Prophylaxis-adult »	C		48.00
07/28/2017					Clinical Note			
					test note-			
12/15/2017			D8670	DROBB	Periodic ortho visit (contract	C		950.00
12/15/2017	1		D7140	DROBB	Extract,erupted th/exposed rt»	C	P2	135.00
12/15/2017	16		D7140	DDS2	Extract,erupted th/exposed rt	C		135.00
12/15/2017	17		D7230	DDS2	Extraction-impacted/part bony	C	P1	213.00
12/15/2017	32		D7140	DDS2	Extract,erupted th/exposed rt	C	P1	135.00
01/07/2018	30	DLB	D2160	DROBB	Amalgam-3 surf. prim/perm »	C		90.00
01/09/2018			95831	DROBB	Muscle testing	C		0.00
01/09/2018			90620	DROBB	Exam and consultation	C		0.00
01/09/2018			95868	DROBB	Electromyography	C		0.00
01/09/2018			D0270	DROBB	Bitewing-single film	C		15.00
01/09/2018			D0350	DROBB	Oral/Facial Photographic Image	C		0.00
01/09/2018	2-15		D5110	DROBB	Complete denture - maxillary	C		850.00
01/09/2018	5		D7250	DROBB	Surgic removl resid tooth roo»	C		25.00
01/09/2018	S1		D2110	DROBB	Amalgam-1 surface, primary »	C		51.00
01/09/2018	S1		D2110	DROBB	Amalgam-1 surface, primary »	C		51.00
01/09/2018	LR		D5120	DROBB	Complete denture - mandibular	C		828.00
01/15/2018			90620	DROBB	Exam and consultation	C		500.00

How do I run the Patient Chart and Progress Notes Printout?

In the Patient Chart, from the **File** menu, point to **Print**, and then click **Patient Chart**. For more detailed instructions on how to run this report, see the “Printing progress notes with the chart” topic in the Patient Chart portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Patient Information** – The patient’s name, birth date, chart number, and Social Security number appear on the report.
- B. Graphic Chart** – The graphical chart appears on the report.
- C. Progress Notes** – The following is a comprehensive list of what can appear in the progress notes section:

Columns	Filters
<ul style="list-style-type: none"> • Procedure Date • Tooth • Surface • Procedure Code • Provider • Procedure Description • Procedure Status • Approval Status • Procedure Amount 	<ul style="list-style-type: none"> • Treatment Plans • Completed Work • Existing Work • Conditions • Exams • Procedure Notes • Clinical Notes

Patient Chart Printout

The Patient Chart Printout allows you to print a patient's graphical chart and treatment plan.



Why: To print a patient's dental chart with a treatment plan to give to the patient
When: As needed

A

Chart

Patient: James S. Abbott	Chart #: ABB101	Date: 05/14/2018
Birthdate: 11/11/1960		SS#: 000-00-0000
Provider: Dennis Smith		
Phone: (480)555-6525		
Office: 1234 South Pine Mesa, AZ 85210		

B

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
32	31	30	29	28	27	26	25	24	23	22	21	20	19	18	17

Today's Completed Work

Tooth	Description	Amount
	27 Amalgam-1 surf. prim/perm	55.00
Charges for this Visit		55.00

Treatment Plan Estimate

Tooth	Description	Amount	Pat.	Dental Ins.
	Periodic oral evaluation	25.00	0.00	25.00
	Prophylaxis-child	34.00	0.00	34.00
	Bitewings-two films	21.00	0.00	21.00
	UR Perio scale&root pln-4+per quad	131.00	0.00	131.00
	7 Post/core + brdg retainer, fabr	230.00	0.00	230.00
	12*14 Maxil partial-metal Base W/sdls	890.00	0.00	890.00
	18 Reimplantation/stabilization	0.00	0.00	0.00
	19 Pontic-cast high noble metal	603.00	0.00	603.00
	20 Pontic-cast high noble metal	603.00	0.00	603.00
	21 Pontic-cast high noble metal	603.00	0.00	603.00
	22 Pontic-cast high noble metal	603.00	0.00	603.00
	23 Cast post/part of brdg retainer	218.00	0.00	218.00
	24 Cast post/part of brdg retainer	218.00	0.00	218.00
	25 Cast post/part of brdg retainer	218.00	0.00	218.00
	31 Extraction-single tooth	71.00	0.00	71.00
Treatment Plan Totals		4468.00	0.00	4468.00

* Treatment Plans Are Estimates Only

C

D

How do I run the Patient Chart Printout?

In the Patient Chart, from the **File** menu, point to **Print**, and then click **Patient Chart**. For more detailed instructions on how to run this report, see the "Printing a patient's chart" topic in the Patient Chart portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Patient Information** – The patient's name, birth date, chart number, and Social Security number appear on the report.
- B. Dental Chart** – If **Print Chart as Displayed** is selected when setting options for this report, the graphical chart appears on the report.
- C. Today's Work** – If **Print Today's Work** is selected when setting up options to run this report, the procedures that were completed on the current date are displayed and totaled.
- D. Treatment Plan Estimate** – If **Print Treatment Plan** and **Print TP Estimate Details** are selected when setting up options to run this report, the patient's treatment-planned procedures and total estimate appear below the dental chart.

Patient Health Assessment Report

The Patient Health Assessment Report displays health information entered for a patient, a family, or a range of patients in specified clinics. The blood pressure, pulse rate, age, height, weight, and body mass index (BMI) of each patient appears on the report.



Why: To print a patient's or multiple patients' health assessments, such as blood pressure, weight, and body mass index

When: As needed

PATIENT HEALT ASSESSMENT

Assessment Date: 8/22/2017 - 8/22/2017

Patient Range: <ALL> to <ALL>

linic(s): <A >

Date: 8/22/2017 1:57:54PM

Page 1 of 1

Date	Patient Name	Blood Pressure	Pulse	Age	Height	Weight	BMI	Provider	Clinic
08/22/2017	Crosby, Brent [CRO124]	128/76	63	64	5ft 10in	185lbs	27	DDS1	CENTRAL
08/22/2017	Crosby, Shirley [CRO102]	166/70	60	52	5ft 4in	110lbs	19	DDS1	CENTRAL
08/22/2017	Raab, Kenneth D [RAA111]	112/80	65	0	6ft 0in	200lbs	27	DDS1	CENTRAL
08/22/2017	Valgardson, Adrian [VAL100]	187/75	66	55	5ft 9in	153lbs	23	DDS1	CENTRAL

How do I run the Patient Health Assessment Report?


For a range of patients, from DXOne Reporting, select **Reference**, and then double-click **Patient Health Assessment Report**. Or, for an individual patient or that patient's entire family, in the Patient Chart, from the **File** menu, click **Patient Health Assessment**, and then click **Print**. For additional details about running this report, see the "Patient Health Assessment Report" topic in the DXOne Reporting portion and the "Printing patient health assessments " topic in the Patient Chart portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

For each patient in the date range of the report, the following appear: blood pressure, pulse rate, age, height, weight, and body mass index (BMI). The provider and clinic attached to each health assessment also appear.

Patient Information Accessed Report

The Patient Information Accessed Report helps you track when any patient's record has been viewed.



Why: To ensure that patient information is being viewed in accordance with patient privacy standards in your office, and to inform the doctor, office manager, and business owner of any situations so that appropriate action can be taken if necessary

When: Monthly and as needed

Patient Information Accessed

Date Range: 2/1/2018 - 3/1/2018
 Family of Patient: Abbott, James S
 Users: <ALL>
 Clinics: <ALL>

Report Date: 3/1/2018 Page 1 of 1

Time	Location Module/Feature	Patient	Chart Number	Clinic	Status	User
2/18/2018 12:16:51PM	Family File	Abbott, Patricia	ABB102	CENTRAL	Viewed	ENTERPRISE
2/18/2018 12:31:28PM	Family File	Abbott, Timothy	ABB103	CENTRAL	Viewed	ENTERPRISE
2/21/2018 12:45:17PM	Family File	Abbott, James S	ABB101	CENTRAL	Viewed	ENTERPRISE
2/21/2018 3:31:18PM	Family File	Abbott, Patricia	ABB102	CENTRAL	Viewed	ENTERPRISE
2/21/2018 3:35:28PM	Family File	Abbott, Timothy	ABB103	CENTRAL	Viewed	ENTERPRISE
2/21/2018 3:46:45PM	Family File	Abbott, James S	ABB101	CENTRAL	Viewed	ENTERPRISE
2/22/2018 11:21:14AM	Chart	Abbott, Patricia	ABB102	CENTRAL	Viewed	ENTERPRISE
2/22/2018 12:28:59PM	Ledger	Abbott, Patricia	ABB102	CENTRAL	Viewed	ENTERPRISE
2/28/2018 10:27:44AM	Family File	Abbott, Patricia	ABB102	CENTRAL	Viewed	ENTERPRISE
2/28/2018 10:27:54AM	Document Center	Abbott, Patricia	ABB102	CENTRAL	Viewed	ENTERPRISE
2/28/2018 11:31:02AM	Chart	Abbott, Patricia	ABB102	CENTRAL	Viewed	ENTERPRISE
2/28/2018 11:31:14AM	Treatment Planner	Abbott, Patricia	ABB102	CENTRAL	Viewed	ENTERPRISE
2/28/2018 12:09:17PM	Apprintment Book	Abbott, Patricia	ABB102	CENTRAL	Viewed	ENTERPRISE
2/28/2018 3:03:58PM	Family File	Abbott, Patricia	ABB102	CENTRAL	Viewed	ENTERPRISE
2/28/2018 3:04:02PM	Document Center	Abbott, Patricia	ABB102	CENTRAL	Viewed	ENTERPRISE
3/1/2018 8:43:28AM	Document Center	Abbott, Patricia	ABB102	CENTRAL	Viewed	ENTERPRISE

A

B

How do I run the Patient Information Accessed Report?

From DXOne Reporting, select **Audit**, and then double-click **Patient Information Accessed**. For additional details about running this report, see the “Patient Information Accessed Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report contains the following information:

A. Patient – The patient whose record was accessed.

B. Status – An indicator that the patient’s information was viewed. A patient record is considered to have been viewed in the following situations:

- When you select a patient in the **Select Patient** dialog box and then click **OK**.
- When you select a patient in the **Select Patient** dialog box and then click **More Patient Information**.
- When you double-click a patient’s appointment and then click **Patient Info**.
- When you switch from one module to another (patient-specific modules only) with a patient selected. For example, if you open a patient’s Patient Chart and then switch to that patient’s Family File record, Dentrix Enterprise logs two entries for the report.
- When accessing the same patient record in the same module, at the same clinic, on the same date, and/or by the same user after a specified number of minutes has elapsed since the last time that patient’s record was accessed in the same module, at the same clinic, on the same date, and/or by the same user.

C. Other information – Each entry on the report provides the date and time when the patient information was accessed, the module from which it was accessed, the clinic from which it was accessed, the user that accessed it, and the chart number of the patient whose record it was.

Patient Ledger Report

The Patient Ledger report displays transactions posted for a patient.

\$	<p>Why: To provide a patient with a record of his/her transactions</p> <p>When: As needed</p>
-----------	---

SINGLE PATIENT LEDGER							
The Allied Dentist Group							
Date: 05/14/2018						Page: 1	
Patient Name: Shelly Perkins 123 Street Philadelphia, PA 19102				Chart Number: PA0007			
				Billing Type: 1			
DATE	TEETH	DESCRIPTION	PATIENT	CHARGE	PAYMENT	BALANCE	
04/22/2018		Balance Forward		0.00		0.00	
04/23/2018	9	Surg place implant: endosteal	Shelly	780.00		780.00	
04/23/2018	4	Crown-porc fuse high noble mtl	Shelly	78.00		858.00	
05/01/2018	15	Mand partial-metal base w/sdls	Shelly	801.00		1659.00	
05/01/2018	9	Extraction cprl remnts-decid th	Shelly	501.00		2160.00	
TOTAL PATIENT BALANCE AS OF 05/14/2018:						2160.00	

A

B

How do I run the Patient Ledger Report?


In the Ledger, from the **Print** menu, click Patient **Ledger**. For more detailed instructions on how to generate this report, see the "Patient Ledger Report" topic in the Ledger portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Family History** – All financial transactions posted to the Ledger (starting with the specified first transaction date) for the patient.
- B. Patient Total Balance** – The patient balance as of the current date.

Patient List

The Patient List allows you to view patients entered into Dentrix Enterprise. To sort patients alphabetically, run the Patient List (Standard List) report. To sort patients by chart number, run the Patient List (Chart Number Report).

	<p>Why: To view active patients, inactive patients, non-patients, and archived patients entered in Dentrix Enterprise, to view patients who prefer a specific provider, and to view patients with a specific billing type</p> <p>When: As needed</p>
---	--

PATIENT LIST

Last Visit Before: <ALL>
 Patient Status: Active, Inactive, Non-Patient, Archived
 Patient Range: <ALL> - <ALL>
 Clinics: CENTRAL
 Providers: <ALL>
 Billing Types: <ALL>

Report Date: 05/06/2018

Report Generated By: enterprise

Page 1 of 4

Abbott, James S
 1234 Pine Ave
 Murray, UT 84123

Dental Pri: Metropolitan Life
 Dental Sec: Aetna Life and Casualty
 Medical Pri: Aetna Medical
 Medical Sec:

Prov/Clin: DROBB/CENTRAL
 Home Phone: (J)375-1586
 Work Phone:
 Other:
 Fax:
 Pager:
 E-mail:

Birthdate: 11/11/1962
 SS: 000-00-0000
 Chart: ABB101
 Drivers Lic#:
 Med/Other ID:
 First Visit Date: 12/15/2008
 Last Visit Date: 05/05/2018

Status: Active
 Gender: Male
 Position: Married
 Billing Type: 002

Davis, Harmon P
 12345 Oak Drive
 East Granby, CT 06026

Dental Pri: Delta Dental
 Dental Sec:
 Medical Pri:
 Medical Sec:

Prov/Clin: DDS7/CENTRAL
 Home Phone:
 Work Phone:
 Other:
 Fax:
 Pager:
 E-mail:

Birthdate: 11/11/1970
 SS: 000-00-0000
 Chart:
 Drivers Lic#:
 Med/Other ID:
 First Visit Date: 12/15/2008
 Last Visit Date:

Status: Active
 Gender: Male
 Position: Single
 Billing Type: 001

Hansen, Cory S
 1234 Amhurst Street
 Brooklyn, NY 11215

Dental Pri: BLUE SHIELD PA
 Dental Sec: CIGNA
 Medical Pri:
 Medical Sec:

Prov/Clin: DDS1/CENTRAL
 Home Phone: (919) 555-2656
 Work Phone: (808) 555-5864
 Other:
 Fax:
 Pager:
 E-mail:

Birthdate: 11/11/1957
 SS: 000-00-0000
 Chart: HA0002
 Drivers Lic#:
 Med/Other ID:
 First Visit Date: 11/18/2015
 Last Visit Date:

Status: Active
 Gender: Male
 Position: Single
 Billing Type: 001

Kenner, Spencer
 12345 Lindon Place
 Miami, WA 20226

Dental Pri: MLB Insurance Plan
 Dental Sec:
 Medical Pri:
 Medical Sec:

Prov/Clin: DDS1/CENTRAL
 Home Phone: (781) 555-9616
 Work Phone: (701) 555-9885
 Other:
 Fax:
 Pager:
 E-mail:

Birthdate: 11/11/1949
 SS: 000-00-0000
 Chart:
 Drivers Lic#:
 Med/Other ID:
 First Visit Date:
 Last Visit Date:

Status: Active
 Gender: Male
 Position: Single
 Billing Type: 001

Little, Brian
 1234 Oak Street
 Glen Rock, PA 17327

Dental Pri: Metropolitan Life

Prov/Clin: DDS1/CENTRAL
 Home Phone:
 Work Phone:
 Other:
 Fax:

Birthdate: 11/11/1955
 SS: 000-00-0000
 Chart:
 Drivers Lic#:
 Med/Other ID:

Status: Active
 Gender: Male
 Position: Single
 Billing Type: 001

PATIENT LIST (CHART NUMBER REPORT)

Last Visit Before: <ALL>
 Patient Status: Active, Inactive, Non-Patient
 Patient Range: <ALL> - <ALL>
 Clinics: CENTRAL
 Providers: <ALL>
 Billing Types: <ALL>

Report Date: 05/06/2018

Report Generated By: enterprise

Page 1 of 1

PATIENT NAME	BIRTH DATE	SOC.SEC.#	CHART #
Abbott, James S	11/11/1962	000-00-0000	ABB101
Crosby, Brent P	11/11/1962	000-00-0000	CRO101
Davis Harmon S	11/11/1962	000-00-0000	DAV101
Davis, Karen	11/11/1962	000-00-0000	DAV102
Edwards, Anna	11/11/1962	000-00-0000	EDW101
Edwards, John	11/11/1962	000-00-0000	EDW102
Edwards, Kimberly	11/11/1962	000-00-0000	EDW103
Farrer, Lisa R	11/11/1962	000-00-0000	FAR101
Gleason, Alice	11/11/1962	000-00-0000	GLE101
Hansen, Corey	11/11/1962	000-00-0000	HAN101
Hayes, Sally	11/11/1962	000-00-0000	HAY101
Johnson, Rachelle	11/11/1962	000-00-0000	JOH101
Little, Brian	11/11/1962	000-00-0000	LIT101
Little, Carol	11/11/1962	000-00-0000	LIT101
Perkins, Allen	11/11/1962	000-00-0000	PER101
Perkins, Peggy M	11/11/1962	000-00-0000	PER101
Reeves, Elisabeth	11/11/1962	000-00-0000	REE101
Smith, Michael	11/11/1962	000-00-0000	SMI101
Taylor, Kerri	11/11/1962	000-00-0000	TAY101
Winters, Carl	11/11/1962	000-00-0000	WIN101
Young, Tina	11/11/1962	000-00-0000	YOU101

A

How do I run the Patient List?


From the DXOne Reporting module, select **List**, and then double-click **Patient/Inactive Patient List**. For step-by-step instructions on how to run this report, see the "Patient and Inactive Patient List" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Patient Details – The Patient List (Chart Number Report) displays the name, birth date, Social Security number, and chart number of each patient. The Patient List (Standard List) includes all of the information covered by the Patient List (Chart Number Report), plus general patient information (such as, address, phone numbers, and insurance information).





Patient List (Filtered)

The Patient List (Filtered) displays a list of patients according to specified criteria, such as information from their medical alerts/problems, medications, prescriptions, demographics, and laboratory test results.

	Why: To view and sort a list of patients according to specified criteria
	When: As needed

Patient Name	Age	Chart	Problem Description	Problem Date Diagnosed
Abbott, James S	51	ABB101	Asthma	
Abbott, James S	51	ABB101	Dizziness	05/15/2018
Abbott, James S	51	ABB101	Other	04/25/2018
Crosby, Brent L	48	CRO101	Arthritis	07/09/2017
Crosby, Brent L	48	CRO101	Blood Disease	06/18/2018

How do I run the Patient List (Filtered)?

In the Office Manager, from the **Analysis** menu, click **Patient List**. For as many filters as you want to set up, under **Double click on filter below**, double-click each desired item to specify the criteria of that filter. Click the **OK** button . Click the **Next** button . In the desired categories, double-click the data fields that you want to include. Click the **Next** button . Then, click the **Run** button .

For additional details about running this report, see the "Patient List (Filtered)" topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Patient – The specified patient information:

- **Allergies** – Description and/or Discovery Date.
- **Appointments** – Appt Date/Time, Next Appt Date/Time, and/or Provider.
- **Completed Procedures** – ADA Code, Amount, Clinic, Entry Date, Procedure Date, and/or Provider.
- **Continuing Care** – Due Date and/or Name.
- **ICD-9-CM** – Code, Entry Date, and/or Procedure Date.
- **Immunizations** – Administered Date/Time and/or Vaccine Abbr Desc.
- **Laboratory Test Results** – Test Date, Test Name, and/or Test Result.
- **Medical Alerts/Problems** – Date Diagnosed and/or Description.
- **Medications** – Description and/or Prescribed Date.
- **Patient Information** – Age, Birth Date, Chart, City, Clinic, Contact, County, Email, Ethnicity, Gender, Home Phone, Homeless Status, Language, Mobile Phone, OtherID, Pat ExtID, Patient Name, Poverty Level, Pref Contact, Prim Prov, Race, Religion, State, Street 1, Street 2, User Def Cat, Veteran, Work Phone, Worker Status, and/or ZIP Code.
- **Prescriptions** – Drug Name and/or Rx Date.


A patient will show in the results list according to the setup of the selected filters:

- **Age** – A patient who is older or younger than the specified age or who is between the specified ages (inclusive).
- **Allergies** – A patient who has all or any one of the specified allergies that were entered on any date, before a specified date, after a specified date, or between specified dates (inclusive).
- **Appointment Date** – A patient who has an appointment on or before a specified date, on or after a specified date, or between specified dates (inclusive).
- **Assigned Clinic** – A patient who is assigned to the specified clinic.
- **Completed Procedures** –
- **Continuing Care** – A patient who has the specified continuing care types attached to his or her records and who is due for a continuing care visit on any date, on or before a specified date, on or after a specified date, or between specified dates (inclusive).
- **Ethnicity** – A patient of the specified ethnicity.
- **Gender** – A patient of the specified gender.
- **Homeless Status** – A patient with the specified homeless status.
- **ICD-9-CM Diagnostic Codes** – A patient who has been diagnosed with all or any one of the specified diagnoses that were entered on any date, before a specified date, after a specified date, or between specified dates (inclusive).
- **Laboratory Test Results** – A patient who has lab test results that are equal to, greater than, greater than or equal to, less than, or less than or equal to the specified test result that was received on any date, before a specified date, after a specified date, or between specified dates (inclusive).
- **Language** – A patient who speaks the specified language.
- **Medical Alerts/Problems** – A patient who has all or any one of the specified medical alerts that were entered on any date, before a specified date, after a specified date, or between specified dates (inclusive).
- **Medications** – A patient who has all or any one of the specified medications that were entered on any date, before a specified date, after a specified date, or between specified dates (inclusive).
- **Poverty Level** – A patient with the specified poverty level.
- **Preferred Contact** – A patient with the specified preferred contact method.
- **Prescriptions** – A patient who has all or any one of the specified prescriptions that were entered on any date, before a specified date, after a specified date, or between specified dates (inclusive).
- **Primary Provider** – A patient with the specified primary provider.
- **Race** – A patient of the specified race.
- **Religion** – A patient of the specified religion.
- **User Defined Category** – A patient with the specified user-defined category.
- **Veteran** – A patient with the specified veteran status.
- **Worker Status** – A patient with the specified worker status.

Note: A patient may show up more than once if he or she meets the search criteria for multiple filter types (for example, medical alerts, medications, and prescriptions).

Patient Notes Report

The Patient Notes Report displays notes and alerts attached to patients.



Why: To view notes and alerts by patient
When: As needed

PATIENT NOTE REPORT						
Dentrix Dental Practice						
Date:	03/08/2018				Page:	1
PATIENT NAME	CHART NUM	SS#	HOME PHONE	WORK PHONE	LAST VISIT	
Abbott, Timothy PATIENT ALERT NOTES - Require Payment - Always Payment must be at time of service.	AB0003	000-00-0003	(801)555-1586	(801)555-1487	11/11/2017	A
Brown, Mary PERIO EXAM NOTES Perio Date: 03/08/2018 The patient is suffering from severe suppruration and was advised to begin treatment immediately.	BR0001	000-00-0004	(801)555-4509	(801)555-2000	07/02/2017	B
Crosby, Brent L APPOINTMENT NOTES Appointment Date: 03/08/2018 The patient has a sever tooth ache.	CR001	000-00-0005	(801)555-5969	(801)555-6600	07/02/2017	C
Davis, Harmon MEDICAL ALERTS Allergy - Aspirin	DA0007	000-00-1234	(801)555-1530	()	03/22/2018	D
Davis, Karen PATIENT NOTE - Tue - Mar 8, 2018 - Karen is divorced from Harmon Davis who is listed in her file as a non-patient to provide insurance coverage for their children. He is also set up in his own Family File.	DA0003	000-00-0007	(801)555-1530	()	01/01/2018	E
F CONTINUING CARE NOTES 03/08/2018 PROPHY Come in for your cleaning and receive a free tooth whitening treatment.						F
Davis, Kelly INSURANCE CLAIM STATUS NOTES Claim Date: 03/08/2018 The claim was lost somewhere between our office and the insurance carrier. We are consequently re-sending it.- Tue - Mar 8, 2011 - GW	DA0004	000-00-0123	(801)555-1530	()	03/08/2018	G
Davis, Lyle PAYMENT PLAN NOTES Provider DDS1: Since the first payment was set on the weekend. we agreed to push it back to the following Monday.	DA0005	000-00-0234	(801)555-1530	()	03/22/2018	H
Edwards, John GUARANTOR NOTE - Edwards, John John has been out of work for several weeks - Tue - Mar 8, 2018 - GW	ED0002	000-00-9876	(801)555-7101	()	01/01/2018	I
J GUARANTOR STATEMENT NOTE - Edwards, John; Print Until 04/08/2018 We appreciate your prompt payment.						J

How do I run the Patient Notes Report?

From the Office Manager, from the **Reports** menu, point to **Lists**, and then click **Patient Notes Report**. For step-by-step instructions on how to run this report, see the "Patient Notes Report" topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

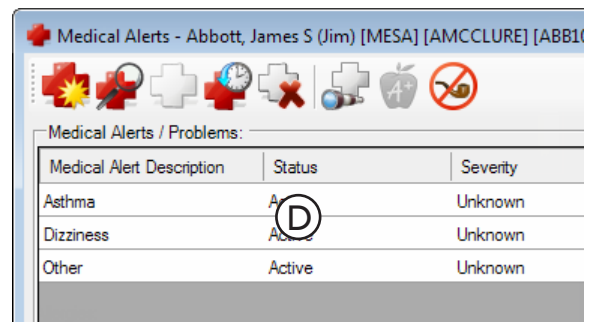
A. Patient Alert Notes – The patient alerts assigned to a patient. Patient alerts are found in the **Patient Alerts** dialog box, which can be accessed by selecting a patient in the Family File and then clicking the Patient Alerts button.

Start Date	End Date	Description
(Always)	(Always)	Extra time
05/16/2013	05/16/2014	Payment req'd

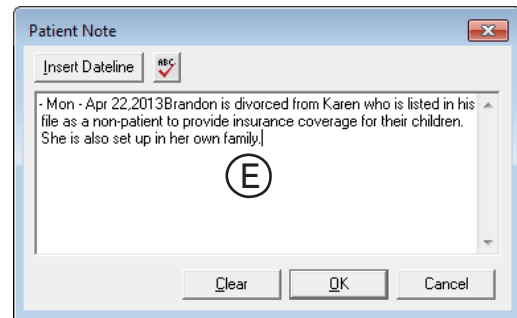
B. Perio Exam Notes – The notes attached to a patient's perio exam. Perio exam notes are found in the **Perio Clinical Notes** dialog box, which can be accessed by selecting an exam and then clicking **Diagnostics** on the Perio Chart menu bar.

C. Appointment Notes – The notes attached to a patient's appointment. Appointment notes are found in the **Appointment Information** dialog box, which can be accessed by double-clicking an appointment in the Appointment Book.

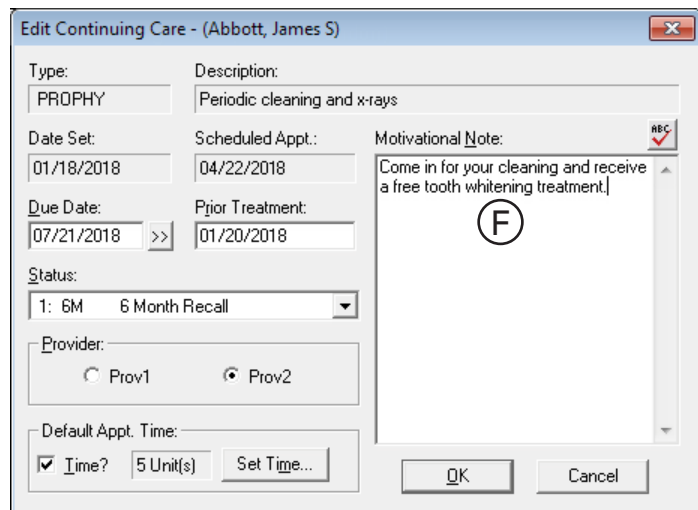
D. Medical Alerts – The medical alerts/problems, medications/prescriptions, and allergies that are attached to a patient. Medical alerts are found in the **Medical Alerts** dialog box, which can be accessed by selecting a patient in the Family File and then double-clicking the Medical Alerts block.



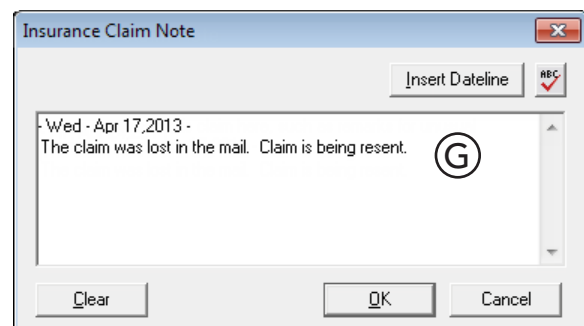
E. Patient Notes – The notes attached to a patient. Patient notes are found in the **Patient Note** dialog box, which can be accessed by selecting a patient in the Family File and then double-clicking the Patient Notes block.



F. Continuing Care Notes – The notes attached to a patient's continuing care type. Continuing care notes are found in the **Edit Continuing Care** dialog box, which can be accessed by selecting a patient in the Family File, double-clicking the Continuing Care block, and then double-clicking a continuing care type.



G. Insurance Claim Notes – The notes attached to an insurance claim. Insurance claim notes are found in the **Insurance Claim Notes** dialog box, which can be accessed by clicking the **Note** menu option in the insurance claim window.



H. Payment Plan Notes – Payment plan notes do not display notes attached to payment

agreements. Rather, they display notes attached to future payment due payment plans. Payment plan notes are found in the **Payment Plan** dialog box.

To access this dialog box, from the **Transaction** menu in the Ledger, click **Process Future Due Payment Plan**. Select a future due payment plan, and click **OK**.



- I. **Guarantor Note** – The notes attached to a guarantor. Guarantor notes are found in the **Guarantor Notes** dialog box, which can be accessed by selecting a patient in the Ledger and clicking the **Guarantor Notes** button.

J. Guarantor Statement Note –

The notes attached to guarantor statements. Guarantor statement notes are found in the **Guarantor Notes** dialog box, which can be accessed by selecting a patient in the Ledger and clicking the Guarantor Notes button.

Patient Proposed Treatment Case Report (Your Care Plan)

The Patient Proposed Treatment Case Report displays only treatment plan cases with “Proposed” statuses. This report is patient-specific (can be generated for one patient at a time). The report lists the patient’s proposed treatment plan cases and financial data regarding those cases.

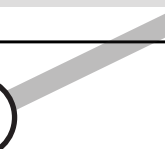
	Why: To generate a list of proposed treatment plan cases along with cost information to give to a patient
	When: As needed

Your Care Plan

Patient: Brent Crosby	(A)	Date: 2/1/2018	
Phone:		Chart #: CR93	
Provider: Dennis Smith		SS #: 111-11-1111	
Office:		Birthdate: 11/11/1970	

Treatment Required	TX Case		Total TX Case Amount	Estimated Patient Portion	Estimated Insurance Portion
1	Eval	(B)	155.00	0.00	155.00
2	Restore		190.00	38.00	152.00
Total :			345.00	38.00	307.00

(C)



How do I run the Patient Proposed Treatment Case Report (Your Care Plan)?

In the Treatment Planner module, from the **File** menu, point to **Print**, and then click **Patient Proposed Tx Case Report**. For additional details about running this report, see the "Patient Proposed Treatment Case Report" topic in the Treatment Planner portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Patient Information** – The patient's name, chart number, Social Security Number, birth date, and primary provider (from the Family File).
- B. Treatment Case Details** – The name of each proposed treatment plan case and a subtotal of the fees, estimated patient portions, and estimated insurance portions for all treatment in each case.
- C. Totals** – The total fee, estimated patient portion, and estimated insurance portion for all treatment in all proposed treatment plan cases.

Patient Questionnaire

You can print a hard copy of the patient questionnaire, which contains the patient's personal, referral, guarantor/spouse, employment, and insurance information along with any custom questions (for example, questions regarding medical or dental history).



Why: To provide the patient with a printout from which he or she can review personal and insurance information and medical and dental history

When: At patient check-in

A Patient Information		Chart#: <u>ABB101</u> <small>FOR OFFICE USE ONLY</small>
Patient Name: <u>Abbott, James S</u> Jim Date: <u>03/08/2018</u>		
Gender(M/F): <u>M</u> Marital Status: <u>Married</u> Birth Date: <u>11/11/1982</u> Social Security #: <u>000-00-0041</u>		
Driver's License #: _____ E-Mail Address: _____		
Address: <u>1234 S Oak,</u>		
<u>Murray</u>	<u>UT</u>	<u>84123</u>
<small>Street</small>	<small>City</small>	<small>State</small>
Phone #'s: Home <u>555-1586</u> Work _____ Ext _____ Best time to call: _____		
FAX _____ Pager _____ Other _____		
Referral Information		
Name of person, office or other source referring you to our practice: <u>Crosby, Brent L</u>		
Spouse or Responsible Party Information		
Name: <u>Abbott, James S</u> Jim Date: <u>03/08/2018</u>		
Gender(M/F): <u>M</u> Marital Status: <u>Married</u> Birth Date: <u>11/11/1982</u> Social Security #: <u>000-00-0041</u>		
Driver's License #: _____ E-Mail Address: _____		
Address: <u>1234 S Oak,</u>		
<u>Murray</u>	<u>UT</u>	<u>84123</u>
<small>Street</small>	<small>City</small>	<small>State</small>
Phone #'s: Home <u>555-1586</u> Work _____ Ext _____ Best time to call: _____		
FAX _____ Pager _____ Other _____		
Employment Information		
The following is for: <input checked="" type="checkbox"/> the patient <input type="checkbox"/> the person responsible for payment		
Employer Name: <u>Acme Bank</u>		
Address: <u>123 Hill Dr</u> <u>Provo</u> <u>UT</u> <u>84604</u> <u>555-4701</u>		
<small>Street</small>	<small>City</small>	<small>State</small>
<small>Zip Code</small>		
Insurance Information		
Primary		
Name of Insured: <u>Abbott, James S</u>		
Insured's Birth Date: <u>11/11/1982</u> ID #: <u>000-00-0000</u> Group #: <u>16023</u>		
Insured's Address: <u>1234 S Oak</u> <u>Murray</u> <u>UT</u> <u>84123</u>		
<small>Street</small>	<small>City</small>	<small>State</small>
<small>Zip Code</small>		
Insured's Employer Name: <u>Acme Bank</u>		
Address: <u>123 Hill Dr</u> <u>Provo</u> <u>UT</u> <u>84604</u>		
<small>Street</small>	<small>City</small>	<small>State</small>
<small>Zip Code</small>		
Patient's relationship to insured: <input checked="" type="checkbox"/> Self <input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Other		
Insurance Plan Name and Address: <u>Allied Group Insurance Trust, P.O. Box 29109,</u>		
<u>St. Louis, MO, 63126</u>		
Secondary		
Name of Insured: <u>Abbott, Timothy</u>		
Insured's Birth Date: <u>11/11/1984</u> ID #: _____ Group #: <u>321863</u>		
Insured's Address: <u>1234 S Oak</u> <u>Murray</u> <u>UT</u> <u>84123</u>		
<small>Street</small>	<small>City</small>	<small>State</small>
<small>Zip Code</small>		
Insured's Employer Name: _____		
Address: _____		
<small>Street</small>	<small>City</small>	<small>State</small>
<small>Zip Code</small>		
Patient's relationship to insured: <input type="checkbox"/> Self <input checked="" type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Other		
Insurance Plan Name and Address: <u>Aetna Life and Casualty, P.O. Box 12345,</u>		
<u>Fort Wayne, IN, 46801</u>		

DENTRIX 1987-2016

A Patient Information	
Patient: Abbott, James S	Date: 03/08/2018
Birth Date: 11/11/1982	Chart#: ABB101
Provider: DDS9	SS#: 000-00-0041
Phone: 555-1586	
Address: 1234 S Oak	
Murray, UT 84123	
B Patient Questionnaire	
Date of Questionnaire	<i>03/08/2018</i>
Do you have any medical conditions that we should be aware of?	<i>No</i>
If yes, please explain: _____	
Have you ever had any complications following dental treatment?	<i>No</i>
If yes, please explain: _____	

How do I run the Patient Questionnaire?

1. From any module (except the Office Manager), click the Patient Questionnaire button to open the Patient Questionnaire History window.
2. Select an existing questionnaire, and click **View** or **Edit**. Or, select a questionnaire type from the list, and click **New**.
3. To print the full questionnaire (all the patient information and custom questions), click **Print**. To print just the custom questions, click **Print Questions**. The responses to the questions will print if you are viewing or editing an existing questionnaire; new questionnaires don't have any responses, yet.

For more detailed instructions on printing a patient questionnaire, see the "Printing questionnaires" topic in the Other Features portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?



A. Patient Information

- **Full Questionnaire** – The patient's personal, referral, guarantor/spouse, employment, and insurance information stored in the Family File.
- **Questions Only** – The patient's name, birth date, chart number, and Social Security number stored in the Family File.

B. Questions – Questions regarding medical/dental history and/or other custom questions, and the patient's responses (if any).

Patient Route Slip

The Patient Route Slip report allows you to print route slips for each appointment scheduled on a selected date or date range.

	Why: To review patient details prior to an appointment, and to communicate work between the back office and front office
	When: Daily, and as needed

Tuesday - March 8, 2018 at 9:50am **PATIENT ROUTE SLIP** For Mr. Brent L Crosby

A PATIENT INFORMATION

PATIENT NAME: <input checked="" type="checkbox"/> PATIENT CLAIMS PENDING Mr. Brent L Crosby 123 E Everberry Ln Eastside, NV 11111 HOME: (801)555-5969 WORK: (801)555-6600 EMPLOYER: Allied Plumbing SOC SEC NUMBER: 000-00-0005 CHART NUMBER: CR001 MEDICAL ALERTS:	PRIMARY PROVIDER: DDS1 SECONDARY PROVIDER: FIRST VISIT DATE: 04/14/2015 YEARS AS A PATIENT: 5 LAST VISIT DATE: 07/02/2017 CCDATES: 01/03/2018 BITEWINGS LAST PROPHYLAXIS: 07/02/2017 01/03/2018 PROPHY MISSED APPT NUM: 0 LAST MISSED APPT: LAST REFERRED BY: LAST REFERRED TO: # REFERRALS: 0 LAST REFERRAL: LAST GRATUITY:
---	---

Patient Notes:

B ACCOUNT INFORMATION

GUARANTY NAME: <input checked="" type="checkbox"/> FAMILY CLAIMS PENDING Mr. Brent L Crosby 123 E Everberry Ln Eastside, NV 11111 HOME: (801)555-5969 WORK: (801)555-6600 EMPLOYER: Allied Plumbing SOC SEC NUMBER: 000-00-0005 BILLING TYPE: 1 LAST STATEMENT: LAST PAYMENT: NA LAST PMT AMT: 0.00 NEXT PAYMENT: NA PAYMENT DUE: NA	<p style="text-align: center;">C INSURANCE INFORMATION</p> PRIMARY CARRIER: Ameritas SUBSCRIBER: Brent L Crosby (Self) EMPLOYER: Allied Plumbing GROUP NUMBER: 11220 MAXIMUM BENEFITS: 2000.00 BENEFITS USED: 1340.00 Jan BENEFITS REMAINING: 660.00 DED OWED S/P/O: PAT-50/50/0, FAM-0/0/0 <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border: 1px solid black;">PREV: 100%</td> <td style="border: 1px solid black;">BASIC: 80%</td> <td style="border: 1px solid black;">MAJOR: 50%</td> <td style="border: 1px solid black;">ORTHO: 50%</td> </tr> </table> SECONDARY CARRIER: Connecticut General SUBSCRIBER: Shirley H Crosby (Spouse) EMPLOYER: GROUP NUMBER: 65001 MAXIMUM BENEFITS: 2000.00 BENEFITS USED: 0.00 Jan BENEFITS REMAINING: 2000.00 DED OWED S/P/O: PAT-0/25/0, FAM-0/0/0 <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border: 1px solid black;">PREV: 100%</td> <td style="border: 1px solid black;">BASIC: 80%</td> <td style="border: 1px solid black;">MAJOR: 50%</td> <td style="border: 1px solid black;">ORTHO: 50%</td> </tr> </table>	PREV: 100%	BASIC: 80%	MAJOR: 50%	ORTHO: 50%	PREV: 100%	BASIC: 80%	MAJOR: 50%	ORTHO: 50%
PREV: 100%	BASIC: 80%	MAJOR: 50%	ORTHO: 50%						
PREV: 100%	BASIC: 80%	MAJOR: 50%	ORTHO: 50%						

0==>30	31==>60	61==>90	91==>	INS EST	SUS CRED	BALANCE
100.00	0.00	0.00	0.00	45.00	0.00	100.00

NAME (2 of 2)	POSITION	GEN	BIRTHDAY	AGE	LAST VISIT	LAST PROPHY	CCDATE	NEXT APPT	TP
*Mr. Brent L Crosby	Married	M	11/11/1967	43	07/02/2017	D	01/03/2018(+)	04/04/2018(+)	S
Mrs. Shirley H Crosby	Married	F	11/11/1969	41	01/01/2018		01/07/2019 (+)		N

E APPOINTMENT INFORMATION

APPT DATE: 04/10/2019	TIME: 10:00am	SCHEDULED TIME: 40 Minutes	APPT AMOUNT: 2913.00
OPERATORY: DEF_OP1	PROVIDER: AROSE	APPT STATUS:	

NOTES:

DATE	ORDER	TOOTH	CODE	PROCEDURE	AMOUNT
04/10/2019			D0240	Intraoral-occlusal film	2515.00
04/10/2019			D0290	Skull & facial bone survey film	84.00
04/10/2019			D0320	TMJ arthrogram, incl injection	253.00
04/10/2019			D0330	Panoramic film	61.00
04/11/2019			D0320	TMJ arthrogram, incl injection	253.00

TOTAL: 3166.00

F

DATE	TIME	PROVIDER	REASON
04/11/2019	10:00am	AROSE	TMJarthro

How do I run the Patient Route Slip?

1. In the Office Manager, from the **Reports** menu, point to **Lists**, and then click **Daily Appointment List**.
2. Ensure the **Patient Route Slips** option is selected.
3. Click **OK**.

OR

From the Appointment Book, right-click an appointment, and select **Print Route Slip**.

For step-by-step instructions on how to run this report, see the "Daily Appointment List" and "Route slip" topics in the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Patient Information** – The patient's contact information, employer, preferred provider(s), number of years as a patient, number of missed appointments, and referral information.

If a certain clinic setting is enabled, this section also includes the patient's financial information: aged balances, estimated insurance portion, suspended credits, balance, and estimated patient portion (Balance + Appt Amount – Ins Est). The estimated insurance portion is the insurance estimate for the procedures attached to the appointment for which the route slip is generated. However, if the clinic setting is not enabled, the financial information does not appear.

PATIENT INFORMATION							
PATIENT NAME:		<input checked="" type="checkbox"/> PATIENT CLAIMS PENDING					
Mr. Brent L Crosby 123 E Everberry Ln Eastside, NV 11111							
HOME: (801)555-5969				WORK: (801)555-6600			
EMPLOYER: Allied Plumbing							
SOC SEC NUMBER: 000-00-0005 CHART NUMBER: CR001							
MEDICAL ALERTS:							
0==>30	31==>60	61==>90	91==>	INS EST	SUS CRED	BALANCE	EST PAT PORT
100.00	0.00	0.00	0.00	1500.00	0.00	100.00	1513.00

- B. Account Information** – The guarantor's information and the financial information for the account: aged balances, estimated insurance portion, suspended credits, and balance.

If a certain clinic setting is enabled, this section also includes the estimated guarantor portion (Balance + Appt Amount – Ins Est). The estimated insurance portion includes the insurance estimate for other family members' completed procedures (whether or not they are attached to a claim) and includes the insurance estimate for the procedures attached to the appointment for which the route slip is generated. However, if the clinic setting is not enabled, the estimated guarantor portion does not appear, and the estimated insurance portion is the insurance estimate for the patient's and the other family members' completed procedures.

ACCOUNT INFORMATION							
GUARANTOR NAME:		<input checked="" type="checkbox"/> FAMILY CLAIMS PENDING					
Mr. Brent L Crosby 123 E Everberry Ln Eastside, NV 11111							
HOME: (801)555-5969				WORK: (801)555-6600			
EMPLOYER: Allied Plumbing							
SOC SEC NUMBER: 000-00-0005 LAST STATEMENT:							
BILLING TYPE: 1				LAST PMT AMT: 0			
LAST PAYMENT:				PAYMENT DUE: NA			
NEXT PAYMENT: NA				EST GUAR PORTION: 1513.00			
0==>30	31==>60	61==>90	91==>	INS EST	SUS CRED	BALANCE	
100.00	0.00	0.00	0.00	1500.00	0.00	100.00	

- C. Insurance Information** – The patient's primary and secondary insurance information.
- D. Continuing Care** – The patient's continuing care due date and next appointment date.
- E. Appointment Information** – The procedures to be completed during the current appointment.
- F. Future Appointments** – The dates and times of the patient's future appointments.

Patient Treatment Case Report

The Patient Treatment Case Report displays treatment plan cases for a specific patient within specific procedure and case expiration dates. The report may also include items, such as patient and family account balances and dental insurance plan maximums and deductibles.



Why: To print the treatment cases created for a patient

When: As needed

Patient Treatment Case Report

Patient: Abbott, James S	Date: 3/8/2018
Provider: Dennis Smith, D.D.S	Chart #: ABB101
Phone: (801)555-1942	SS #: 000-00-0041
Office: 1234 Pine St American Fork, UT 84003	Birthdate: 11/11/1962

Case Name: Treatment Plan **Priority:** None **Finance Status:** None

Alternate Cases:


Status: Created **Last Updated:** 3/8/2011

Comment: Case created by user: ENTERPRISE

Case Note:

Ent Date	Prc Date	Visit	Tooth	Surface	Code	Prov	Description	Fee	Pat	Prim Ins	Sec Ins	Office
3/8/2018	3/8/2018	1	4	D,	D2110	DDS9		151.00	0.00	80.80	70.20	151.00
Visit: 1 Subtotal:								151.00	0.00	80.80	70.20	151.00
Ent Date	Prc Date	Visit	Tooth	Surface	Code	Prov	Description	Fee	Pat	Prim Ins	Sec Ins	Office
3/8/2018	3/8/2018	2	13		D7280	DDS9	Surgical method to expose a covered tooth so it can grow in normally	350.00	240.00	100.00	10.00	350.00
3/8/2018	3/8/2018	2	14		D7280	DDS9	Surgical method to expose a covered tooth so it can grow in normally	350.00	145.00	200.00	5.00	350.00
3/8/2018	3/8/2018	2	15		D7280	DDS9	Surgical method to expose a covered tooth so it can grow in normally	350.00	0.00	100.00	250.00	350.00
Visit: 2 Subtotal:								1,050.00	385.00	400.00	265.00	1,050.00
Ent Date	Prc Date	Visit	Tooth	Surface	Code	Prov	Description	Fee	Pat	Prim Ins	Sec Ins	Office
3/8/2018	3/8/2018	3	19		D2750	DDS9	Crown restoration made of porcelain fused to high noble metal (has a strong, hypo-allergenic base)	713.00	0.00	500.00	213.00	713.00
Visit: 3 Subtotal:								713.00	0.00	500.00	213.00	713.00
Total:								1,914.00	385.00	980.80	548.20	1,914.00

Treatment Plan Total	1,914.00
Estimated Deductible to be Applied	75.00
Estimated Insurance Payment	1,529.00
Estimated Patient's Portion	385.00
Patient Balance	-12,430.55
Family Balance	52.00

Dental Insurance Benefits		Patient	
		Primary	Secondary
Annual Plan Benefits		1,500.00	2,000.00
Paid Benefits YTD		0.00	0.00
Pending Insurance Est. YTD		0.00	0.00
Est. Benefits Remaining YTD		1,500.00	2,000.00
Benefits Expire		12/31/2018	12/31/2018
Deductible Owed YTD	Standard	50.00	25.00
	Preventive	0.00	0.00
	Other	0.00	0.00
Primary Dental Insurance	Allied Group Insurance Trust		
Secondary Dental Insurance	Aetna Life and Casualty		

How do I run the Patient Treatment Case Report?

1. In the Treatment Planner, select the appropriate patient.
2. From the **File** menu, point to **Print**, and then click **Patient Treatment Case Report**.

For additional details about running this report, see the "Printing the Patient Treatment Case Report" topic in the Treatment Planner portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Treatment** – The treatment-planned procedures are grouped by visit. A subtotal of fees, patient portions, and insurance estimates for each visit are given.
- B. Case Totals** – The total fees, patient portions, and insurance estimates totals for all visits in the case.
- C. Other Totals** – The treatment plan total, estimated insurance portion, deductible to be applied, estimated patient portion, and patient and family account balances.
- D. Insurance Benefits** – Details of the current insurance plan maximums and deductibles for the patient are shown.

Patient's Ledger Report

The Patient's Ledger Report displays all transactions posted to the Ledger for an individual patient. Depending on report settings, the total family balance, individual family balances, and guarantor payments and adjustments also appear on this report.

\$	Why: To provide a patient with a record of his or her transactions When: As needed
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PATIENT'S LEDGER REPORT						
The Dentist Group				Date:	04/23/2018	Page: 1
A Patient Name: James S Abbott 123 S Oak St Murray, UT 84123			Chart Number: ABB101 Billing Type: 2			
DATE	TEETH	DESCRIPTION	PATIENT	CHARGE	PAYMENT	BALANCE
03/23/2018		Balance Forward		6407.84		6407.84
04/22/2018	5	Post/core + brdg retainer, fabr	James	230.00		6637.84
04/22/2018		Prophylaxis-adult	James	0.00		6637.84
04/22/2018		Periodic oral evaluation	James	0.00		6637.84
04/22/2018		Bitewings-four films	James	0.00		6637.84
04/22/2018		Panoramic film	James	0.00		6637.84
04/22/2018		Professional Discount	<Family>		-10.00	6627.84
04/22/2018		Check Payment - Thank You	<Family>		-125.00	6502.84
04/23/2018	6	Extraction-single tooth	James	71.00		6573.84
TOTAL PATIENT BALANCE AS OF 04/23/2018:						6573.84
B						
C						

How do I run the Patient's Ledger Report?

In the Office Manager, from the **Reports** menu, point to **Ledger**, and then click **Patient's Ledger Report**. For additional details about running this report, see the "Patient's Ledger Report" topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Patient Details** – The patient's name, street address, chart number, and billing type.
- B. Patient History** – All transactions posted to the patient's Ledger during the date range of the report.
- C. Total Patient Balance** – The patient's current balance.

Payment Agreement Amortization Schedule

The Payment Agreement Amortization schedule displays an amortization schedule for a patient's payment agreement. You might want to print this report and provide it to patients at the time a payment agreement is created.



Why: To provide patients with an amortization schedule

When: After creating a payment agreement, and as needed

PAYMENT AGREEMENT AMORTIZATION

The Allied Dentist Group

Date: 05/15/2018

Page: 1

Guarantor Name: Abbott, Patricia

Chart Number: ABB102
Payment Interval: Monthly

#	DATE DUE	AGREED PAYMENT AMOUNT	INTEREST 12 % Annual f / 12 = f	PRINCIPAL	BALANCE
					5956.04
1	04/30/2018	1000.00	59.56	940.44	5015.60
2	05/30/2018	1000.00	50.16	949.84	4065.76
3	06/30/2018	1000.00	40.66	959.34	3106.42
4	07/30/2018	1000.00	31.06	968.94	2137.48
5	08/30/2018	1000.00	21.37	978.63	1158.85
6	09/30/2018	1000.00	11.59	988.41	170.44
TOTALS		6000.00	214.40	5785.60	



How do I run the Payment Agreement Amortization Schedule?

1. From the Ledger, click the Payment Agreement button to open the **Billing/Payment Agreement Information** dialog box.
2. Click **Print** to open the **Print for Payment Agreement** dialog box.
3. Select **Amortization of Payments and Finance Charges**.
4. Click **Print** or **Send to Batch**.

For additional details about running this report, see the “Printing payment agreement documents” topic in the Ledger portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Payment Details** – The payment due date, amount, interest to be applied, amount to be applied to principal, and balance of the financed amount.
- B. Totals** – The total amount paid by the end of the finance period, interest to be paid, and principal to be paid.

Payment Agreement Report

The Payment Agreement Report lists the payment agreements that have not been completed.

\$

Why: To ensure the practice follows up with guarantors that fail to make payments, to identify and assist guarantors prone to default on the agreement, and to reduce the amount of bad debt the practice writes off

When: As frequently as your patients are required to make payments

PAYMENT AGREEMENT REPORT									
For Provider(s): <ALL> - <ALL>									
Date: 04/23/2018					Page: 1				
GUARANTOR NAME	PHONE#	PA DATE	BAL FOR PA	AGREE AMT	NEXT PMT DATE	LAST PMT DATE			
BT/PROV	FC%/GRACE	1st PMT	BAL REMAIN	TOT.# PMTS	NEXT AMT DUE	LAST PMT AMT			
LAST LATE CHARGE	DATE/AMOUNT	PA INTERVAL	ACCT BAL	REM.# PMTS	AMT PAST DUE	# PMTS MISSED			
Reeves, Joshua	(919)555-1978	04/23/2018	7800.00	1000.00	05/01/2018				
1/DDS2	12.000/0	05/01/2018	7800.00	9	1000.00	0.00			
	none	monthly	0.00	9	0.00	0			
Jeff has paid once a month and will begin payments 13 days from the date of this payment agreement to coincide with his monthly pay check.									
Taylor, Mark L	(919)555-1045	04/23/2018	180.00	20.00	04/30/2018				
1/DDS2	12.000/0	04/30/2018	180.00	10	20.00	0.00			
	none	monthly	180.00	10	0.00	0			

TOTAL # OF PAYMENT AGREEMENTS:	2
TOTAL BALANCES REMAINING:	7980.00
TOTAL ACCOUNT BALANCES:	180.00
TOTAL AGREED PAYMENT AMOUNTS:	1020.00
TOTAL AMOUNTS PAST DUE:	0.00
TOTAL AMOUNTS DUE:	1020.00

A

B

C

GUARANTOR NAME	PHONE#	PA DATE	BAL FOR PA	AGREE AMT	NEXT PMT DATE	LAST PMT DATE			
BT/PROV	FC%/GRACE	1st PMT	BAL REMAIN	TOT.# PMTS	NEXT AMT DUE	LAST PMT AMT			
LAST LATE CHARGE	DATE/AMOUNT	PA INTERVAL	ACCT BAL	REM.# PMTS	AMT PAST DUE	# PMTS MISSED			
Reeves, Joshua	(919)555-1978	04/23/2018	7800.00	1000.00	05/01/2018				
1/DDS2	12.000/0	05/01/2018	7800.00	9	1000.00	0.00			
	none	monthly	0.00	9	0.00	0			
Jeff has paid once a month and will begin payments 13 days from the date of this payment agreement to coincide with his monthly pay check.									

D

How do I run the Payment Agreement Report?

In the Office Manager, from the **Reports** menu, point to **Ledger**, and then click **Payment Agreement Report**. For additional details about running this report, see the "Payment Agreement Report" topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Original Agreement Details – In addition to the name and phone number of the guarantor, the following information is included:

- **PA Date** – The date of the payment agreement.
- **Bal For PA** – The original balance of the payment agreement.
- **Agree Amt** – The monthly payment amount.

B. Future Transactions

- **Next Pmt Date** – The next payment due date.
- **Next Amt Due** – The next payment amount.

C. Current Status:

- **Last Pmt Date** – The guarantor's last payment date.
- **Last Pmt Amt** – The amount of the guarantor's last payment.
- **Rem # Pmts** – The number of payments remaining.
- **Bal Remain** – The remaining balance of the payment agreement.
- **Acct Bal** – The guarantor's current account balance.

D. PA Notes – If you check **Print Last PA Note** when setting options for the report, the last payment agreement note prints on the report.

Payment Summary Report

The Payment Summary Report displays totals by payment type.

\$	<p>Why: To verify bank and credit processing statements, to compare collection agencies, and to view payment totals by payment types</p> <p>When: As needed</p>
-----------	---

Payment Summary				
05/01/2018 - 05/05/2018 Procedure Date Clinics: <ALL> Providers: <ALL> Billing Type: <ALL> Payment Types: <ALL>				
Report Date: 05/05/2018	Report Generated By: enterprise			Page 1 of 1
Description	Quantity	Total	Average	Percent
Cash Payment - Thank You	3	-140.00	-46.67	25.93%
Check Payment - Thank You	4	-200.00	-50.00	37.04%
Credit Card Payment -Thank You	2	-23.96	-11.98	4.44%
Dental Insurance - Primary	2	-45.00	-22.50	22.50%
Grand Totals	A	B	C	D
E	13	-539.96	-41.54	

How do I run the Payment Summary Report?

From the DXOne Reporting module, select **Analysis**, and then double-click **Payment Summary**. For additional details about running this report, see the "Payment Summary Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Quantity** – The number of payments received.
- B. Total** – The total dollar amount of payments received.
- C. Average** – The average payment amount (Total / Quantity).
- D. Percent** – The payment total compared to all payments (Total / Total Of All Payments). The percent column assists you in comparing the most popular payment types. The higher the percentage, the more revenue was brought in by the payment type.
- E. Grand Totals** – The Grand Totals section includes the quantity, total, and average for all the payments on the report.

Perio - Combined Graphic & Data Chart Report

The Perio - Combined Graphic & Data Chart Report is a data chart and graphical representation of all periodontal data collected during a perio examination.

Why: To provide a patient with the results of his/her perio exam

When: After completing a perio exam, and as needed

Perio Examination

Patient: James S. Abbott
Birthdate: 11/11/1960
Provider: Dennis D. Smith D.D.S.
Phone: (801)555-9300
Office: 123 E. Valley Drive # 500
 American Fork, UT 84003

Date: 05/15/2018
SS#: 000-00-0000

	DCM	DCM	DCM	DCM	DCM	DCM	DCM	MCD	MCD	MCD	MCD	MCD	MCD	MCD	MCD	
PD		111	414	112	222		323	332	323		333	322		213	111	
GM																
CAL		111	414	112	222		323	332	323		333	322		213	111	
MG																

	DCM	DCM	DCM	DCM	DCM	DCM	DCM	MCD	MCD	MCD	MCD	MCD	MCD	MCD	MCD	
PD		132	133	231	321		323	333	432		432	132		431	232	
GM																
CAL		132	133	231	321		323	333	432		432	132		431	232	
MG																

RIGHT
LEFT

	DCM	DCM	DCM	DCM	DCM	DCM	DCM	MCD	MCD	MCD	MCD	MCD	MCD	MCD	MCD	
PD		113	212	212	333	321	432	132	223	143	321	443	232	132	113	
GM																
CAL		113	212	212	333	321	432	132	223	143	321	443	232	132	113	
MG																

	DCM	DCM	DCM	DCM	DCM	DCM	DCM	MCD	MCD	MCD	MCD	MCD	MCD	MCD	MCD	
PD		341	312	323	412	132	322	234	123	223	123	231	231	212	312	
GM																
CAL		341	312	323	412	132	322	234	123	223	123	231	231	212	312	
MG																

D = Distal GM = Gingival Margin CAL = Clinical Attachment Level MG = Mucogingival Junction
 C = Central ● Bleeding ● Suppuration ● Bleeding and Suppuration © Dentrix 1990 - 2018
 M = Mesial Furcation: F1 ∨ F2 ∇ F3 ▼ F4 ▽ Mobility: 1 2 3 4 PD = Prb Depth

Dentrix Enterprise 11.0 Reports Reference

How do I run the Perio - Combined Graphic & Data Chart Report?

From the Perio Chart, from the **File** menu, click **Print**. For additional details about running this report, see the "Printing Perio Chart reports" topic in the Perio Chart portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

Note: This report prints in a landscape format.

What important information does this report provide?


This report contains the following perio exam results:

- Probing Depth
- Bleeding/Suppuration
- Gingival Margin
- Clinical Attachment Level
- Mucogingival Junction
- Plaque/Mobility/Bone Loss
- Furcation Grade
- Maxillary/Mandibular Tooth Codes

Note: A legend is provided below the chart.

Perio - Data Chart Report

The Perio - Data Chart Report is a table of all periodontal data collected during a periodontal examination.



Why: To provide a patient with the results of his/her periodontal exam

When: After completing a periodontal exam, and as needed

The Allied Dentist Group 123 East Valley Dr American Fork, UT 84003 (801)555-9300																
Patient: James S. Abbott										Report Date: 05/15/2018						
Exam by: Dennis D. Smith D.D.S.										Exam Date: 05/15/2018						
MAXILLARY TOOTH NUMBER:																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
	DCM	DCM	DCM	DCM	DCM	DCM	DCM	DCM	MCD	MCD	MCD	MCD	MCD	MCD	MCD	MCD
Probing Depth	- Facial	1 1 1	4 1 4	1 1 2	2 2 2	-	3 2 3	3 3 2	3 2 3	-	3 3 3	3 2 2	-	2 1 3	1 1 1	-
	- Lingual	1 3 2	1 3 3	2 3 1	3 2 1	-	3 2 3	3 3 3	4 3 2	-	4 3 2	1 3 2	-	4 3 1	2 3 2	-
Bleeding/Suppuration	- Facial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	- Lingual	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Gingival Margin	- Facial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	- Lingual	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Clinical Attachment Level	- Facial	1 1 1	4 1 4	1 1 2	2 2 2	-	3 2 3	3 3 2	3 2 3	-	3 3 3	3 2 2	-	2 1 3	1 1 1	-
	- Lingual	1 3 2	1 3 3	2 3 1	3 2 1	-	3 2 3	3 3 3	4 3 2	-	4 3 2	1 3 2	-	4 3 1	2 3 2	-
Mucogingival Junction	- Facial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	- Lingual	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Plaque/Mobility/Bone Loss	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Furcation Grade	- Buccal	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	- Lingual	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Maxillary Tooth Codes	M				C	M	C			M			M			M
MANDIBULAR TOOTH NUMBER:																
	32	31	30	29	28	27	26	25	24	23	22	21	20	19	18	17
	DCM	DCM	DCM	DCM	DCM	DCM	DCM	DCM	MCD	MCD	MCD	MCD	MCD	MCD	MCD	MCD
Probing Depth	- Facial	3 4 1	3 1 2	3 2 3	4 1 2	1 3 2	3 2 2	2 3 4	1 2 3	2 2 3	1 2 3	2 3 1	2 3 1	2 1 2	3 1 2	-
	- Lingual	1 1 3	2 1 2	2 1 2	3 3 3	3 2 1	4 3 2	1 3 2	2 2 3	1 4 3	3 2 1	4 4 3	2 3 2	1 3 2	1 1 3	-
Bleeding/Suppuration	- Facial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	- Lingual	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Gingival Margin	- Facial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	- Lingual	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Clinical Attachment Level	- Facial	3 4 1	3 1 2	3 2 3	4 1 2	1 3 2	3 2 2	2 3 4	1 2 3	2 2 3	1 2 3	2 3 1	2 3 1	2 1 2	3 1 2	-
	- Lingual	1 1 3	2 1 2	2 1 2	3 3 3	3 2 1	4 3 2	1 3 2	2 2 3	1 4 3	3 2 1	4 4 3	2 3 2	1 3 2	1 1 3	-
Mucogingival Junction	- Facial	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	- Lingual	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Plaque/Mobility/Bone Loss	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Furcation Grade	- Buccal	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	- Lingual	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Mandibular Tooth Codes	M															M

LEGEND				
TOOTH CODES	GINGIVA PROBING CODES	PLAQUE	BONE LOSS	OTHER CODES
M Missing	0 to 9 mm below the CEJ	1 - Light	1 - Mild	B Bleeding
U Unerupted	> >9 mm below the CEJ	2 - Moderate	2 - Moderate	S Suppuration
P Pontic	A 1 mm above the CEJ	3 - Heavy	3 - Severe	* Bleeding & Suppuration
I Implant	B 2 mm above the CEJ			> Greater than 9 mm
C Crown	C 3 mm above the CEJ			
IC Implant+Crown	D 4 mm above the CEJ			
ID Impacted Distal	E >4 mm above the CEJ			
IM Impacted Mesial				

How do I run the Perio - Data Chart Report?

From the Perio Chart, from the **File** menu, click **Print**. For additional details about running this report, see the "Printing Perio Chart reports" topic in the Perio Chart portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

Note: This report prints in a landscape format.

What important information does this report provide?


This report contains the following perio exam results:

- Probing Depth
- Bleeding/Suppuration
- Gingival Margin
- Clinical Attachment Level
- Mucogingival Junction
- Plaque/Mobility/Bone Loss
- Furcation Grade
- Maxillary/Mandibular Tooth Codes

Note: A legend is provided below the chart.

Perio - Exam Comparison Report

The Perio - Exam Comparison Report compares the results of two or more periodontal examinations using data and graphical charts (depending on the data being compared).



Why: To provide the patient with the results of a periodontal examination

When: After completing a periodontal exam, and as needed

The Allied Dentist Group
123 East Valley Dr
American Fork, UT 84003
(801)555-9300

Patient: James S. Abbott Report Date: 05/15/2018

Probing Depth Comparison

MAXILLARY TOOTH #	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16																								
	DCM	DCM	DCM	DCM	DCM	DCM	DCM	DCM	MCD	MCD	MCD	MCD	MCD	MCD	MCD	MCD																								
Facial 12/15/2017	5	4	5	6	1	1	1	8	8	8	1	8	9	1	2	1	6	5	1	3	2	1	6	1	6	5	1	1	5	6	1	3	1	6	3	5	1	M		
Change																																								
05/15/2018	M	1	1	1	4	1	4	1	1	2	2	2	M	3	2	3	3	3	2	3	2	3	M	3	3	3	3	2	2	M	2	1	3	1	1	1	M			
Lingual 12/15/2007	3	3	6	1	5	1	1	1	1	2	5	6	1	3	4	5	6	1	2	3	1	5	3	4	6	5	1	3	5	1	1	5	1	5	3	1	3	1	5	M
Change																																								
05/15/2018	M	1	3	2	1	3	3	2	3	1	3	2	1	M	3	2	3	3	3	3	4	3	2	M	4	3	2	1	3	2	M	4	3	1	2	3	2	M		

MANDIBULAR TOOTH #	32	31	30	29	28	27	26	25	24	23	22	21	20	19	18	17																																	
	DCM	DCM	DCM	DCM	DCM	DCM	DCM	DCM	MCD	MCD	MCD	MCD	MCD	MCD	MCD	MCD																																	
Facial 12/15/2017	3	1	1	5	1	5	1	1	5	1	6	3	1	5	6	3	1	5	6	1	6	1	6	1	3	2	1	3	1	3	1	6	5	4	6	5	1	3	1	6	5								
Change																																																	
05/15/2018	M	3	4	1	3	1	2	3	2	3	4	1	2	1	3	2	3	4	1	2	3	2	2	3	1	2	3	2	3	1	2	3	1	2	1	2	3	1	2	M									
Lingual 12/15/2017	4	4	4	4	5	1	4	5	1	4	5	1	1	4	4	4	5	1	2	1	5	6	6	3	5	5	6	2	2	1	1	5	1	2	1	2	4	4	5	3	1	2	3	1	6	5	6	4	
Change																																																	
05/15/2018	M	1	1	3	2	1	2	2	1	2	3	3	3	3	2	1	4	3	2	1	3	2	2	2	3	1	4	3	3	2	1	4	4	3	2	3	2	1	3	2	1	1	3	M					

LEGEND

TOOTH CODES	GINGIVAL MARGIN (GM) PROBING CODES	CHANGE SYMBOLS
M Missing	0 to 9 mm below the CEJ	↓ >1mm and 2mm worse
U Unerupted	> >9 mm below the CEJ	↘ >2mm worse
P Pontic	A 1 mm above the CEJ	↗ >1mm and 2mm better
I Implant	B 2 mm above the CEJ	↑ >2mm better
C Crown	C 3 mm above the CEJ	
IC Implant+Crown	D 4 mm above the CEJ	
ID Impacted Distal	E >4 mm above the CEJ	
IM Impacted Mesial		

How do I run the Perio - Exam Comparison Report?

From the Perio Chart, from the **File** menu, click **Print**. For additional details about running this report, see the "Printing Perio Chart reports" topic in the Perio Chart portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

Note: This report prints in a landscape format.

What important information does this report provide?

Printing a comparison of exams is only possible if you are viewing a comparison. To indicate the exams you want to compare, from the **Options** menu in the Perio Chart, click **Exam Comparison**. This report displays the following changes since the previous perio exam:

- Probing Depths are presented in a data chart.
- Gingival Margins are presented in a data or graphical chart.
- Clinical Attachment Levels are presented in a data or graphical chart.
- Mobility is presented in a data chart.
- Furcation Involvement is presented in a data chart.

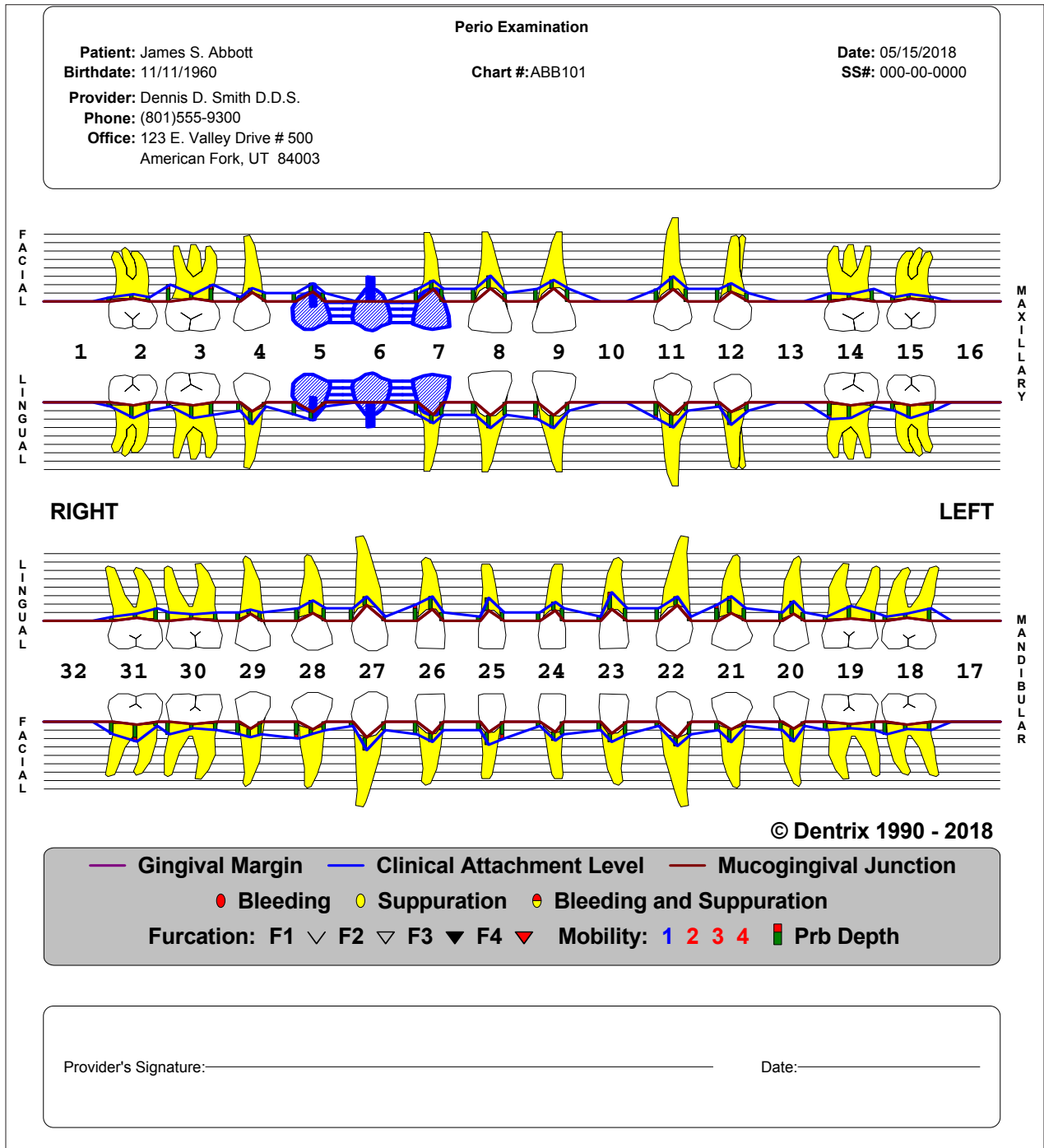
Note: A legend is provided below the chart.

Perio - Graphic Chart Report

The Perio - Graphic Chart Report is a graphical representation of all periodontal data collected during a periodontal examination.

Why: To provide a patient with the results of his or her periodontal exam

When: After completing a periodontal exam, and as needed



How do I run the Perio - Graphic Chart Report?

From the Perio Chart, from the **File** menu, click **Print**. For additional details about running this report, see the "Printing Perio Chart reports" topic in the Perio Chart portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

Note: This report prints in a landscape format.

What important information does this report provide?


This report contains the following perio exam results:

- Probing Depth
- Bleeding/Suppuration
- Gingival Margin
- Clinical Attachment Level
- Mucogingival Junction
- Mobility
- Furcation Grade

Note: A legend is provided below the chart.

Perio - Pocket Depths Only Report

The Perio - Pocket Depths Only Report is a table of the pocket depths recorded during a periodontal examination.



Why: To provide a patient with the results of his/her periodontal exam

When: After completing a periodontal exam, and as needed

The Allied Dentist Group 123 East Valley Dr American Fork, UT 84003 (801)555-9300																	
Patient: James S. Abbott										Report Date: 05/15/2018							
Exam by: Dennis D. Smith D.D.S.										Exam Date: 05/15/2018							
MAXILLARY TOOTH NUMBER:	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	
	DCM	DCM	DCM	DCM	DCM	DCM	DCM	DCM	MCD	MCD	MCD	MCD	MCD	MCD	MCD	MCD	
Probing Depth	- Facial	-	1 1 1	4 1 4	1 1 2	2 2 2	-	3 2 3	3 3 2	3 2 3	-	3 3 3	3 2 2	-	2 1 3	1 1 1	-
	- Lingual	-	1 3 2	1 3 3	2 3 1	3 2 1	-	3 2 3	3 3 3	4 3 2	-	4 3 2	1 3 2	-	4 3 1	2 3 2	-
Maxillary Tooth Codes	M				C	M	C			M			M			M	
MANDIBULAR TOOTH NUMBER:	32	31	30	29	28	27	26	25	24	23	22	21	20	19	18	17	
	DCM	DCM	DCM	DCM	DCM	DCM	DCM	DCM	MCD	MCD	MCD	MCD	MCD	MCD	MCD	MCD	
Probing Depth	- Facial	-	3 4 1	3 1 2	3 2 3	4 1 2	1 3 2	3 2 2	2 3 4	1 2 3	2 2 3	1 2 3	2 3 1	2 3 1	2 1 2	3 1 2	-
	- Lingual	-	1 1 3	2 1 2	2 1 2	3 3 3	3 2 1	4 3 2	1 3 2	2 2 3	1 4 3	3 2 1	4 4 3	2 3 2	1 3 2	1 1 3	-
Mandibular Tooth Codes	M																M

LEGEND	
TOOTH CODES	OTHER CODES
M Missing	> Greater than 9 mm
U Unerupted	
P Pontic	
I Implant	
C Crown	
IC Implant+Crown	
ID Impacted Distal	
IM Impacted Mesial	

How do I run the Perio - Pocket Depths Only Report?

From the Perio Chart, from the **File** menu, click **Print**. For additional details about running this report, see the "Printing Perio Chart reports" topic in the Perio Chart portion of the Dentrax Enterprise Help (from the **Help** menu of any module, click **Contents**).

Note: This report prints in a landscape format.

What important information does this report provide?


This report contains the following periodontal exam results:

- Probing Depth
- Maxillary/Mandibular Tooth Codes


Note: A legend is provided below the chart.


Perio Exam List

The Perio Exam List displays the periodontal exams the practice has performed for a selected date and/or patient range.

	<p>Why: To see if the office is using the Perio Chart feature, and to view periodontal exams the practice has performed for a selected date and/or patient range</p> <p>When: As needed</p>
---	---

PERIO EXAM LIST	
Dentrix Dental Practice	
Date: 03/08/2018	Page: 1
DATE	NAME
03/08/2018	Abbott, Ken S
03/08/2018	Abbott, Patricia
03/08/2018	Abbott, Timothy
03/08/2018	Brown, Mary
03/08/2018	Crosby, Brent L
03/08/2018	Crosby, Shirley H
03/08/2018	Davis, Harmon
03/08/2018	Davis, Karen
03/08/2018	Davis, Kelly
03/08/2018	Davis, Lyle
03/08/2018	Edwards, Anna
03/08/2018	Edwards, John
03/08/2018	Edwards, Kimberly
03/08/2018	Farrer, Lisa
03/08/2018	Gleason, Alice
03/08/2018	Gleason, Gary N
03/08/2018	Hansen, Corey L
03/08/2018	Hayes, Sally
03/08/2018	Little, Brian
03/08/2018	Little, Carol
03/08/2018	Little, Chad
03/08/2018	Little, Dean
03/08/2018	Little, Kevin
03/08/2018	Myers, Teresa
03/08/2018	Myers, Timothy
03/08/2018	Perkins, Allen
03/08/2018	Perkins, Peggy
03/08/2018	Perkins, Shelly
03/08/2018	Reeves, Elisabeth M
03/08/2018	Reeves, Joshua
03/08/2018	Schow, Lawrence P
03/08/2018	Smith, Michael
03/08/2018	Taylor, Kerri
03/08/2018	Taylor, Mark
03/08/2018	Young, Tina





How do I run the Perio Exam List?

From the Office Manager, from the **Reports** menu, point to **Lists**, and then click **Perio Exam List**. For additional details about running this report, see the "Perio Exam List" topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).


What important information does this report provide?

- A. Date** – The date of the perio exam.
- B. Name** – The patient for which the perio exam was performed.

Periodontal Exam Report

The Periodontal Exam Report displays the percentage of oral health patients who received a periodontal exam (determined by specified ADA and/or condition codes) at least once during a specified time frame.

For example, you may want to track patients who received a comprehensive oral exam (ADA code D0150) or a periodic recall oral evaluation (ADA code D0120)—the denominator codes—and then received a periodontal exam (ADA code D0180)—the numerator code.



Why: To view statistics regarding the periodontal examinations for patients

When: Yearly

Percent of Patients Who Have Received a Periodontal Exam			
Date Range: 5/14/2018 - 5/14/2018 - Procedure Date			
Clinics: <ALL>			
Age Range: All Patients			
Providers: <ALL>			
A B			
Numerator Codes: D1330 Denominator Codes: D0120			
Report Date: 5/14/2018		Page 1 of 1	
Clinic			
Provider	Numerator	Denominator	Percent
Patient Name	Chart	Procedure Codes	
CENTRAL	3	2	150.00%
DESMITH	2	1	200.00%
Abbott, Jan	AB32	Numerator: D1330	
Crosby, Tom	CR95	Numerator: D1330 Denominator: D0120	
DSMITH	1	0	0.00%
Crosby, Shirley	CR94	Numerator: 1330	
MHAYES	0	1	0.00%
Winters, Jillian	WI213	Denominator: D0120	
Totals:	3	2	150.00%

How do I run the Periodontal Exam Report?

From DXOne Reporting, select **Lists**, and then double-click **Periodontal Exam**. For additional details about running this report, see the "Periodontal Exam Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report contains the following information:

- A. Numerator** – The specified ADA codes and/or conditions.
- B. Denominator** – The specified ADA codes and/or conditions.
- C. Clinic Totals** – The Numerator, Denominator, and Percent totals for the providers at a given clinic on the report.
- D. Provider Totals** – The Numerator, Denominator, and Percent totals for a given provider who is attached to the Numerator and/or Denominator codes.
- E. Details** – If you select **Include Details** when setting options for this report, patient names, chart numbers, and procedures codes (numerators and denominators) appear on the report.
- F. Totals** – The Numerator, Denominator, and Percent grand totals for all clinics on the report.

Practice Analysis Report

The Practice Analysis report provides statistical data for production, receivables, patients, and financial contracts (payment agreements and future due payment plans).

\$	Why: To view general practice vitality for the current day, month, year, and past three months
	When: After closing out the month

Practice Analysis
 Date Type: Procedure Date
 Clinics: <ALL>
 Providers: <ALL>

Report Date: 05/05/2018 Report Generated By: enterprise

	Production Analysis	Range 04/01/2017 - 05/05/2018	MTD 05/01/2018 - 05/05/2018	Avg 02/01/2018 - 04/30/2018	YTD 01/01/2018 - 05/05/2018
A	Beginning Balance	161,633.30	182,676.90	168,846.67	163,657.34
	Charges				
	Non-insured Charges	15,546.56	3,405.00	1,732.52	13,648.56
	Insured Charges	2,923.00	2,552.00	58.67	2,728.00
	Sub-Total	18,469.56	5,957.00	1,791.19	16,376.56
	Finance Charges	354.00	0.00	110.67	354.00
	Late Charges	7,951.00	0.00	2,650.33	7,951.00
	Debit Adjustments	185.00	0.00	33.33	100.00
	Other Debits	1,510.00	0.00	503.33	1,510.00
	TOTAL CHARGES	28,469.56	5,957.00	5,088.85	26,291.56
	Credits				
	Guarantor Payments	-363.96	-20.00	-96.00	-340.00
	Insurance Payments	-176.00	-71.00	0.00	-71.00
	Sub-Total	-539.96	-91.00	-96.00	-411.00
	Credit Adjustments	-170.00	-50.00	-31.67	-145.00
Other Credits	-900.00	0.00	-300.00	-900.00	
TOTAL CREDITS	-1,609.96 5.66%	-141.00 2.37%	-427.67 8.40%	-1,456.00 5.54%	
Ending Balance	188,492.90	188,492.90	173,507.86	188,492.90	

Production Analysis is calculated according to the provider attached to transactions.

Receivables Analysis		
Current	20,787.56	11.03%
31-60 Days	0.00	0.00%
61-90 Days	0.00	0.00%
Over 90 Days	188,073.64	99.78%
Suspended Credits	-20,368.30	-10.81%
Total Receivables	188,492.90	
Credit Balances as of: 05/05/2009	-20,368.30	

Activity Analysis	Range 04/01/2017 - 05/05/2018	MTD 05/01/2018 - 05/05/2018	Avg 02/01/2018 - 04/30/2018	YTD 01/01/2018 - 05/05/2018
New Patients:	18	0	2	12
Referred Patients:	3	0	0	2
Active Patients:	4,593			
Insured Active Patients:	216			
Number Of Families:	3,060			
Number of Missed Payments:	83			

Activity Analysis is calculated according to the primary provider attached to the patients.

Contract Analysis	
Payment Agreements	18,323.04
Future Due Payment Plans	28,314.44

Contract Analysis is calculated according to the provider attached to the payment plans.

How do I run the Practice Analysis Report?

From the DXOne Reporting module, select **Analysis**, and then double-click **Practice Analysis**. For additional details about running this report, see the "Practice Analysis Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report is divided into the following sections:

- A. Production Analysis** – Provides an overview of charges, payments, and adjustments. The following columns appear in this section:
- **Range** – Totals for the date range of the report.
 - **MTD** – Month-to-date totals.
 - **AVG** – The average for the past three months.
 - **YTD** – Year-to-date totals.
- B. Receivables Analysis** – Displays outstanding balance totals. Balances are broken down by current, 31-60, 61-90, over 90, and suspended credits.
- C. Activity Analysis** – Breaks down the number of new patients and referred patients seen. The number of active patients, active patients with insurance, families, and missed payments figures are calculated according to the primary providers attached to patients' records from the Family File. The following columns appear in this section:
- **Range** – Totals for the date range of the report.
 - **MTD** – Month-to-date totals.
 - **AVG** – The average for the past three months.
 - **YTD** – Year-to-date totals.
- D. Contract Analysis** – Displays the total of future due payment plans and payment agreements.

Practice Organization List

The Practice Organization List displays provider information.

Why: To ensure provider information has been entered properly, and to keep a printed record of provider identification numbers on hand

When: After Dentrix Enterprise setup, and as needed

PRACTICE ORGANIZATION LIST			
Clinics: MESA Providers/Staff: <ALL>			
Report Date: 05/16/2018	Report Generated By: DSMITH		
Page 1 of 2			
Clinic: MESA			
A	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-right: 1px solid black; padding: 5px;"> Provider Name: McClure, Angela Title: Dr. ID: AMCCCLURE Clinic: MESA Address: 7856 South State Mesa, AZ 85210 Phone: (480)555-6525 NPI: 1234567890 BC/BS ID#: 345678 Specialty: Dentist Provider Class: Primary </td> <td style="width: 50%; padding: 5px;"> Fee Schedule:1: Office RVU Schedule:1 SS#:111-11-1111 State ID#:12345 Medicaid#:12345 DrugID#:112233 Provider#:987654 Office#:2222 TIN#:<Default>: 460909000 </td> </tr> </table>	Provider Name: McClure, Angela Title: Dr. ID: AMCCCLURE Clinic: MESA Address: 7856 South State Mesa, AZ 85210 Phone: (480)555-6525 NPI: 1234567890 BC/BS ID#: 345678 Specialty: Dentist Provider Class: Primary	Fee Schedule:1: Office RVU Schedule:1 SS#:111-11-1111 State ID#:12345 Medicaid#:12345 DrugID#:112233 Provider#:987654 Office#:2222 TIN#:<Default>: 460909000
Provider Name: McClure, Angela Title: Dr. ID: AMCCCLURE Clinic: MESA Address: 7856 South State Mesa, AZ 85210 Phone: (480)555-6525 NPI: 1234567890 BC/BS ID#: 345678 Specialty: Dentist Provider Class: Primary	Fee Schedule:1: Office RVU Schedule:1 SS#:111-11-1111 State ID#:12345 Medicaid#:12345 DrugID#:112233 Provider#:987654 Office#:2222 TIN#:<Default>: 460909000		
	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-right: 1px solid black; padding: 5px;"> Provider Name: Hayes, Deborah Title: DDS ID: DHAYES Clinic: MESA Address: 1234 Oak St Mesa, AZ 12345 Phone: (801)555-1234 NPI: 123456789 BC/BS ID#: 2222 Specialty: Dentist Provider Class: Primary </td> <td style="width: 50%; padding: 5px;"> Fee Schedule:1: Office RVU Schedule:1 SS#:111-11-1111 State ID#:1234 Medicaid#:12345 DrugID#:123456 Provider#:3333 Office#:4444 TIN#: </td> </tr> </table>	Provider Name: Hayes, Deborah Title: DDS ID: DHAYES Clinic: MESA Address: 1234 Oak St Mesa, AZ 12345 Phone: (801)555-1234 NPI: 123456789 BC/BS ID#: 2222 Specialty: Dentist Provider Class: Primary	Fee Schedule:1: Office RVU Schedule:1 SS#:111-11-1111 State ID#:1234 Medicaid#:12345 DrugID#:123456 Provider#:3333 Office#:4444 TIN#:
Provider Name: Hayes, Deborah Title: DDS ID: DHAYES Clinic: MESA Address: 1234 Oak St Mesa, AZ 12345 Phone: (801)555-1234 NPI: 123456789 BC/BS ID#: 2222 Specialty: Dentist Provider Class: Primary	Fee Schedule:1: Office RVU Schedule:1 SS#:111-11-1111 State ID#:1234 Medicaid#:12345 DrugID#:123456 Provider#:3333 Office#:4444 TIN#:		
	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-right: 1px solid black; padding: 5px;"> Provider Name: Robbins, David Title: ID: DROBB Clinic: MESA Address: 7856 South Marigold Mesa, AZ 85210 Phone: (480)555-6525 NPI: 0 BC/BS ID#: 154863 Specialty: Dentist Provider Class: Primary </td> <td style="width: 50%; padding: 5px;"> Fee Schedule:1: Office RVU Schedule:1 SS#:111-11-1111 State ID#:154896 Medicaid#:65491835984 DrugID#:123456 Provider#: Office#: TIN#: </td> </tr> </table>	Provider Name: Robbins, David Title: ID: DROBB Clinic: MESA Address: 7856 South Marigold Mesa, AZ 85210 Phone: (480)555-6525 NPI: 0 BC/BS ID#: 154863 Specialty: Dentist Provider Class: Primary	Fee Schedule:1: Office RVU Schedule:1 SS#:111-11-1111 State ID#:154896 Medicaid#:65491835984 DrugID#:123456 Provider#: Office#: TIN#:
Provider Name: Robbins, David Title: ID: DROBB Clinic: MESA Address: 7856 South Marigold Mesa, AZ 85210 Phone: (480)555-6525 NPI: 0 BC/BS ID#: 154863 Specialty: Dentist Provider Class: Primary	Fee Schedule:1: Office RVU Schedule:1 SS#:111-11-1111 State ID#:154896 Medicaid#:65491835984 DrugID#:123456 Provider#: Office#: TIN#:		
	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-right: 1px solid black; padding: 5px;"> Provider Name: Kimball, Jacob A Title: ID: JKD1 Clinic: MESA Address: 789 W Acorn St Mesa, AZ 84601 Phone: (801)555-7845 NPI: 1234567890 BC/BS ID#: 132456 Specialty: Dentist Provider Class: Primary </td> <td style="width: 50%; padding: 5px;"> Fee Schedule:1: Office RVU Schedule:1 SS#:460-93-9333 State ID#:123345 Medicaid#:123541 DrugID#: Provider#: Office#: TIN#:<Default>: 460939333 </td> </tr> </table>	Provider Name: Kimball, Jacob A Title: ID: JKD1 Clinic: MESA Address: 789 W Acorn St Mesa, AZ 84601 Phone: (801)555-7845 NPI: 1234567890 BC/BS ID#: 132456 Specialty: Dentist Provider Class: Primary	Fee Schedule:1: Office RVU Schedule:1 SS#:460-93-9333 State ID#:123345 Medicaid#:123541 DrugID#: Provider#: Office#: TIN#:<Default>: 460939333
Provider Name: Kimball, Jacob A Title: ID: JKD1 Clinic: MESA Address: 789 W Acorn St Mesa, AZ 84601 Phone: (801)555-7845 NPI: 1234567890 BC/BS ID#: 132456 Specialty: Dentist Provider Class: Primary	Fee Schedule:1: Office RVU Schedule:1 SS#:460-93-9333 State ID#:123345 Medicaid#:123541 DrugID#: Provider#: Office#: TIN#:<Default>: 460939333		
	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-right: 1px solid black; padding: 5px;"> Staff Name: Smith, Mary Kaye Title: Office Manager ID: MSMITH </td> <td style="width: 50%; padding: 5px;"> SS#:111-11-1111 </td> </tr> </table>	Staff Name: Smith, Mary Kaye Title: Office Manager ID: MSMITH	SS#:111-11-1111
Staff Name: Smith, Mary Kaye Title: Office Manager ID: MSMITH	SS#:111-11-1111		

How do I run the Practice Organization List?

From the DXOne Reporting module, select **Reference**, and then double-click **Practice Organization List**. For additional details about running this report, see the “Practice Organization List” topic in the DXOne Reporting portion of the Dentrax Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The following report information is found in the **Provider Information** dialog box, which can be accessed in the Office Manager. For details about how to edit this information, see the “Adding, editing, inactivating, and reactivating providers” topic in the Office Manager portion of the Dentrax Enterprise Help.

- A. Provider Details** – The provider’s name, title, provider ID, address, phone number, specialty, and provider class (primary or secondary).
- B. Provider Numbers and Fee Schedule** – The provider’s NPI, BC/BS ID, Social Security, State ID, TIN, Medicaid, DEA, Provider, and Office numbers. This section also includes the provider’s default fee schedule and practice’s RVU schedule.


The screenshot shows the "Provider Information" dialog box with the following fields and values:

- Name:** Last: Smith, First: Dennis, MI: E, Suffix: [blank], Log On: User ID: DSMITH, Edit button.
- ID:** DSMITH, **Title:** DDS, Non-Person, **User Password:** [masked], **Confirm Password:** [masked], Electronic Rx User.
- Specialty:** Dentist.
- Address:** Street: 1234 Oak Street, City: American Fork, State: UT, Zip: 84003.
- Phone:** (801)555-1234, Ext: 2.
- E-Mail:** Desmithdds@henryschein.com.
- Assigned Operatories:** Operator, Clinic, >> button.
- Class:** Primary, Tie to Primary Provider: [blank], Secondary, >> button.
- Insurance Claim Options:** Print Provider's Signature Using: Signature on File, Provider's Name, Use Clinic TIN.
- Fee Schedule:** 1. Office, >> button.
- RVU Schedule:** 1., >> button.
- Clinic:** CENTRAL, >> button.
- TIN #:** <CLINIC>, >> button.
- SS #:** 111-11-1111.
- State ID #:** 123456, **State:** UT.
- State License Expiration:** 11/11/2020.
- Medicaid #:** 1234.
- DEA #:** 123456.
- DEA License Expiration:** 11/11/2020.
- DEA Schedule:** II, III, IV, V.
- NPI:** 1234567890.
- Blue Cross ID #: 111.
- Blue Shield ID #: 111.
- Provider #:** 222.
- Office #:** 333.
- Other ID #:** 444.
- UPIN #:** 98765.

Buttons: OK, Cancel.

Practice Statistics Report

The Practice Statistics Report allows you to review statistical information about your patients.



Why: To view patient demographics, and to assist you in developing strategic business plans

When: As needed

Practice Statistics

Clinics: <ALL>
Providers: <ALL>

Report Date: 04/23/2018 Report Generated By: enterprise Page 1 of 19

A	Patient Statistics	Total	Percent
	Total Number Entered in Family File (any status)	4,592	100.00%
	Number of guarantors that are not patients	3	0.07%
	Number of patients that are not guarantors	1,533	33.38%
	Number of guarantors that are active patients	3,054	66.51%
	Number of male patients	2,818	61.37%
	Number of female patients	1,769	38.52%
	Number of other patients	0	0.00%
	Number of unknown patients	0	0.00%

B	Age Statistics	Total	Percent
	Patient(s) that are 0 to 2 years old	1	0.02%
	Patient(s) that are 3 to 4 years old	0	0.00%
	Patient(s) that are 5 to 6 years old	0	0.00%
	Patient(s) that are 7 to 8 years old	2	0.04%
	Patient(s) that are 9 to 10 years old	1	0.02%
	Patient(s) that are 11 to 12 years old	5	0.11%
	Patient(s) that are 13 to 14 years old	9	0.20%
	Patient(s) that are 15 to 16 years old	30	0.65%

C	Continuing Care Statistics	Total	Percent
	Number of patients that are eligible for Prophy Continuing Care	3	0.07%
	Due for prophy April 2018	0	0.00%
	Due for prophy May 2018	0	0.00%
	Due for prophy June 2018	2	0.04%
	Due for prophy July 2018	0	0.00%
	Due for prophy August 2018	0	0.00%
	Due for prophy September 2018	0	0.00%
	Due for prophy October 2018	1	0.02%
	Due for prophy November 2018	0	0.00%
	Due for prophy December 2018	0	0.00%
	Due for prophy January 2019	0	0.00%
	Due for prophy February 2019	0	0.00%
	Due for prophy March 2019	0	0.00%
	Number of patients who are not on Prophy Continuing Care or are past due	4,632	100.87%

D	New Patient Statistics											
	New	Referred	New	Referred	New	Referred	New	Referred	New	Referred		
	Apr/2018	0	0	Jan/2018	5	0	Oct/2017	0	0	Jul/2017	0	0
	Mar/2018	0	0	Dec/2017	6	1	Sep/2017	0	0	Jun/2017	0	0
	Feb/2018	0	0	Nov/2017	0	0	Aug/2017	0	0	May/2017	0	0

Number of new patients and number of new patients who were referred, by month for the past year.

Provider Statistics		Total	Percent
Number of patients that prefer each provider			
Abbott, James (DDS7)		2	0.04%
Brown, Mary D (DDS2)		370	8.06%
Kenner, Spencer A (JKD1)		1	0.02%
Little, Brian (AMCCLURE)		8	0.17%
Perkins, Peggy (DROBB)		14	0.30%
Smith, Michael D (DDS1)		4,192	91.29%

Patient by Zip Code Statistics		Total	Percent
Number of patients with no zip code on file			
6447		44	0.96%
7828		1	0.02%
00720		1	0.02%
00731		1	0.02%
01111		3	0.07%
01129		1	0.02%
01291		2	0.04%
02030		1	0.02%
02125		2	0.04%
06001		1	0.02%

How do I run the Practice Statistics Report?

From the DXOne Reporting module, select **Management**, and then double-click **Practice Statistics**. For additional details about running this report, see the "Practice Statistics Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Patient Statistics

- Total number of patients.
- Number of guarantors that are not patients.
- Number of guarantors/non-guarantors.
- Number of male/female patients.
- Number of married/single/child/other/widowed/divorced/separated patients.
- Breakdown of patients by insurance status.

B. Age Statistics – A breakdown of the patients by age group.

C. Continuing Care Statistics – A breakdown of the number of patients due for prophylaxis in the next 12 months and the number of patients not on Prophylaxis Continuing Care.



D. New Patients – A breakdown of the number of new patients entered in the Family File in the past 12 months.

E. Provider Statistics – A breakdown of the number of patients that prefer each provider.

F. Patient by Zip Code Statistics – A breakdown of patients by ZIP Code.

Practice Treatment Case Report

The Practice Treatment Case Report displays treatment plan cases for a range of patients within specific procedure and case expiration dates. The report may also include items, such as procedure details, case status history, and patient and insurance estimates.

	Why: To print the treatment cases created in the practice
	When: As needed

Practice Treatment Case Report												
All Providers, Patients Abbott, James S - Crosby, Brent L, All Billing Types												
Procedure Code Date Range: <ALL> - <ALL>												
Fee Expiration Date Range: <ALL> - <ALL>												
Print Subtotals by Visit, Include Finance Status, Include Procedures for Treatment Case, Use Patient Friendly Descriptions, Include Case Status History												
Patient	Case Name	Severity	Provider	Chart #	SS#	Birthdate	Billing Type	Finance Status				
Abbott, James S			DDS9	ABB101	000-00-0041	11/11/1962	4					
Treatment Plan		None		[NONE]								
Accepted		3/8/2018		Case Accepted, with the following linked Case(s) marked as 'Rejected':.								
Created		3/8/2018		Case created by user: ENTERPRISE								
Date	Visit	Tooth	Surface	Code	Prov	Description	Fee	Pat	Prim Ins	Sec Ins		
3/8/2018	3/8/2018	1	4	D,	D2110	DDS9	151.00	0.00	60.00	91.00		
							Visit 1 Subtotal	151.00	0.00	60.00	91.00	
3/8/2018	3/8/2018	2	13		D7280	DDS9	350.00	240.00	100.00	10.00		
3/8/2018	3/8/2018	2	14		D7280	DDS9	350.00	345.00	0.00	5.00		
3/8/2018	3/8/2018	2	15		D7280	DDS9	350.00	0.00	100.00	250.00		
							Visit 2 Subtotal	1,050.00	585.00	200.00	265.00	
3/8/2018	3/8/2018	3	19		D2750	DDS9	713.00	142.60	0.00	570.40		
							Visit 3 Subtotal	713.00	142.60	0.00	570.40	
Expiration Date							3/8/2019+					
							Total	1,914.00	727.60	260.00	926.40	

	Accepted	Pre-Authorized	Scheduled	Completed	Referred	Sched Appt	Unscheduled	Total Cases	Total Tx Planned Amount
Totals	0.50	0.00	0.00	0.25	0.00	1	3	4	5,097.00

How do I run the Practice Treatment Case Report?

In the Treatment Planner, from the **File** menu, point to **Print**, and then click **Practice Treatment Case Report**. For additional details about running this report, see the “Printing the Practice Treatment Case Report” topic in the Treatment Planner portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Case Information** – The report displays the case name, status, and severity; and a history of changes made to the status of the treatment plan case.
- B. Treatment** – The treatment-planned procedures are grouped by visit. A subtotal of fees, patient portions, and insurance estimates for each visit are given.
- C. Case Totals** – The total fees, patient portions, and insurance estimated totals for all visits in the case. The expiration date of the case is also shown.
- D. Other Totals** – The report displays the percentage of accepted, pre-authorized, scheduled, completed, and referred treatment plan cases on the report in decimal format; the number of scheduled and unscheduled appointments for cases on the report, the total number of cases on the report; and the total treatment-planned amount of all cases on the report.

Prescription Printout

A prescription printout is a copy of a prescription for a patient, including dosage, date, refills, and instructions or notes for the patient.



Why: To quickly print a prescription

When: As needed

The Allied Dentist Group
123 East Valley Dr
American Fork UT 84003

PRESCRIBER: Dennis Smith
TELEPHONE: (801)555-9300
DEA NO:
NPI: 0

PATIENT: James S. Abbott
ADDRESS: 123 S Pine St
Murray, UT 84123

TELEPHONE: 555-1586
DOB: 11/11/1980
DATE: 12/22/2017

Rx Erythromycin 250 mg
Disp: 24
1 tab TID
Refills: zero

DISPENSE AS WRITTEN

GENERIC SUBSTITUTION PERMITTED

SIGNATURE OF PRESCRIBER

Copyright 1997-2009 Henry Schein, Inc. RX01

cut here

PATIENT: James S. Abbott
PRESCRIPTION: Erythromycin 250 mg
PRESCRIBED BY: David Robb

DATE: 12/22/2017

Please advise our office immediately if you
experience an adverse reaction. Our emergency
phone number is (555)555-5555

How do I print a prescription?


1. From any module (except the Office Manager), click the Prescriptions button to open the Patient Prescriptions window.
2. Select a prescription, and click **Edit** to view an existing prescription (skip step 3). Or, click **New** to open the **New Patient Prescription** dialog box.
3. Enter the prescription details.
4. Click **Print** to print the prescription.

For additional details about running this report, see the topics for "Prescriptions" in the Other Features portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

Pre-Treatment Estimate Aging Report

The Pre-treatment Estimate Aging Report allows you to view pre-treatment estimates sent to insurance carriers.

Note: This report does not show pre-treatment estimates entered the same day as the report.

	<p>Why: To view pre-treatment estimates sent to insurance carriers</p> <p>When: As needed</p>
---	---

Dental Pre-Treatment Estimate Aging																			
Days Past Due: Over 0 Patient Range: <ALL> - <ALL> Carrier Range: <ALL> - <ALL> Clinics: <ALL> Providers: <ALL> Billing Types: <ALL>																			
Report Date: 04/23/2018							Report Generated By: enterprise				Page 1 of 1								
INSURANCE COMPANY/GROUP PLAN				PHONE #				GROUP NUM.											
SUBSCRIBER	ID NUM	TYPE	SENT	TRACER	ON HOLD	RE-SENT	PATIENT NAME	BIRTHDAY ESTIMATE	1-30	31-60	61-90	91-120	121-150	151-180	181+	TOTAL			
Allied Group Insurance Trust/Allied Group Insurance Trust								(800) 555-7635		16023									
Smith, Dorothy		PRM	4/12/18				Smith, Dorothy	11/11/1979	600.00	0.00	0.00	0.00	0.00	0.00	0.00	900.00	900.00		
Blue Cross Blue Shield of FL/Dental Claims								(800) 555-3398		45067									
Smith, Michael K		PRM	4/12/18				Smith, Michael	11/11/1979	872.00	0.00	0.00	0.00	0.00	0.00	0.00	900.00	900.00		
Acme Company/A.c.s.								SS#											
Little, Brian		PRM	4/12/18				Little, Brian	11/11/1979	262.00	0.00	0.00	0.00	0.00	0.00	0.00	524.00	524.00		
Insurance/Group Plan																			
Winters, Carl		PRM	4/12/18				Winters, Carl	11/11/1979	301.00	0.00	0.00	0.00	0.00	301.00	0.00	0.00	301.00		
Metropolitan Life/Metropolitan								(415) 555-3222		74170									
Abbott, James S		PRM	4/12/18				Abbott, James S	11/11/1979	108.00	0.00	0.00	0.00	135.00	0.00	0.00	0.00	135.00		
		ESTIMATE		1 - 30		31 - 60		61 - 90		91-120		121-150		151-180		181+		TOTAL	
PRIMARY CLAIM TOTALS:		2,143.00		0.00		0.00		0.00		135.00		301.00		0.00		2,324.00		2,760.00	
SECONDARY CLAIM TOTALS:		0.00		0.00		0.00		0.00		0.00		0.00		0.00		0.00		0.00	
TOTAL ALL CLAIMS:		2,143.00		0.00		0.00		0.00		135.00		301.00		0.00		2,324.00		2,760.00	

A

B

C

How do I run the Pre-Treatment Estimate Aging Report?


From the DXOne Reporting module, select **Ledger**, and then double-click **Pre-Estimate Aging**. For additional details about running this report, see the "Pre-Estimate Aging Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).


What important information does this report provide?

- A. Insurance Carrier** – The insurance carrier name, group number, and phone number.
- B. Estimate** – The pre-treatment estimate submitted to the insurance carrier.
- C. Aging Totals** – The aged balances pre-treatment estimates included on the report.

Pre-Treatment Estimates Not Sent Report

The Pre-treatment Estimates Not Sent Report lists estimates that have been created from the Ledger but not sent to the Batch Processor, printed, or sent through eClaims. Estimates are sorted by claim expiration date.

	<p>Why: To ensure estimates are processed after being created from the Ledger</p> <p>When: Daily or weekly</p>
---	--

Dental Pre-Treatment Estimates Not Sent							
Date Range: 04/23/2018 - 04/23/2018 Patient Range: <ALL> - <ALL> Carrier Range: <ALL> - <ALL> Clinics: <ALL> Providers: <ALL> Billing Types: <ALL>							
Report Date: 04/23/2018		Report Generated By: enterprise				 Page 1 of 1	
CLAIM DATE	TYPE	PATIENT NAME	INSURANCE COMPANY NAME	PROVIDER	CLINIC	AMOUNT	EXPIRES
04/23/2018	SEC	Abbott, James S	Aetna Life and Casualty	DDS01	CENTRAL	898.00	10/20/2018
04/23/2018	PRM	Abbott, James S	Metropolitan Life	DDS01	CENTRAL	654.00	07/22/2018
TOTAL OF PRIMARY NOT SENT:						654.00	
TOTAL OF SECONDARY NOT SENT:						898.00	
TOTAL OF CLAIMS NOT SENT:						1,552.00	

How do I run the Pre-treatment Estimates Not Sent Report?

From the DXOne Reporting module, select **Ledger**, and then double-click **Pre-Estimates Not Sent**. For additional details about running this report, see the “Pre-Estimates Not Sent Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Claim Date** – The date on which the estimate was created from the Ledger.
- B. Amount** – The estimate amount.
- C. Expires** – The deadline by which the claim (not the estimate) must be submitted to the insurance carrier after the service date. The expiration date is found in the **Insurance Coverage** dialog box. To access the **Insurance Coverage** dialog box, double-click the Insurance block in the Family File, and then click **Coverage Table**.
- D. Totals** – The amount of the primary, secondary, and all pre-treatment estimates not sent.

Procedure Code List

The Procedure Code List allows you to view and print the procedure codes entered in Dentrix Enterprise.

Why: To ensure Dentrix Enterprise procedure codes match current ADA codes, to view AMA and CPT codes associated with each procedure, and to view dental diagnostic codes associated with each procedure

When: After Dentrix Enterprise setup, and after ADA codes are updated

PROCEDURE CODE LIST										
The Dentist Group										
Codes D0120 - D9999										
Date: 04/22/2018										Page: 1
CODE	DESCRIPTION INCLUDED DIAGN. CODES	ABBREV DESC	CPT	MEDICAL CODE 5	TIME	APPT TYPE	PAINT TYPE	TREAT.	INS?	
		INCLUDED AMA CPT CODES								
D0120	Periodic oral evaluation	PeriodicX			1	Low Product		Mouth		
D0140	Limited oral evaluation	LimitedEx			2	High Produc		Mouth		
	D5-10000 Dental Disease NOS		99201	Office Visit						
	D5-10001 Disease of Teeth NOS		99202	Office Visit New Patient						
	D5-10002 Tooth Disorder NOS		99211	Office Visit Est Patient						
	D5-10578 Tooth Sensitivity		99281	Emergency Dept Visit						
	D5-22071 Painful Lips									
	F-51540 Expectoration of bloody									
	F-51541 Expectoration of hemorrh									
	F-A3610 Facial Nerve Function NOS									
	T-53120 Dorsal Surface of Tongue									
D0145	Oral evaluation < 3 yrs of age	Eval<3yrs			1	High Produc		Mouth		
D0150	Comp oral eval-new/estab pat	CompEx			1	High Produc		Mouth		
D0160	Detail/extensive oral eval, B/R	ExtEval			1	High Produc		Mouth		
D0170	Limited re-evaluation estab pat	ReEval			1	Medium Pro		Mouth		
D0180	Comprehensive perio evaluation	CmpPerEvl			1	Medium Pro		Mouth		
D0210	Intraoral-complete series (bw)	FMX			2	High Produc		Mouth		
D0220	Intraoral-periapical-1st film	PA1st			1	High Produc		Mouth		
D0230	Intraoral-periapical-each add'l	PAadd			1	High Produc		Mouth		
D0240	Intraoral-occlusal film	OcclusalX			1	High Produc		Mouth		
D0250	Extraoral-first film	Extraor1s			1	High Produc		Mouth		
D0260	Extraoral-each additional film	ExtraorX+			1	High Produc		Mouth		
D0270	Bitewing-single film	BW1Xray			1	High Produc		Mouth		
D0272	Bitewings-two films	2BWx			1	High Produc		Mouth		
D0273	Bitewings-three films	3BWx			1	High Produc		Mouth		
D0274	Bitewings-four films	4BWx			1	Low Product		Mouth		
D0277	Vertical bitewings-7 to 8 films	VertBWx			1	Medium Pro		Mouth		
D0290	Skull &facial bone survey film	SurvXray			1	High Produc		Mouth		
D0310	Sialography	Salio			1	High Produc		Mouth		
D0320	TMJ arthrogram, incl injection	TMJarthro			1	High Produc		Mouth		
D0321	Other TMJ films, by report	OtherTMJX			1	High Produc		Mouth		
D0322	Tomographic survey	Tomograph			1	High Produc		Mouth		
D0330	Panoramic film	Pano			1	High Produc		Mouth		
D0340	Cephalometric film	Cephalo			1	High Produc		Mouth		
D0350	Oral/Facial Photographic Images	Orallmags			1	Medium Pro		Mouth		
D0360	Cone beam-CT/craniofacial data	CnCTReco			1	High Produc		Mouth		
D0362	Cone beam-2D multi img reconst	Cn2dlmgRc			1	High Produc		Mouth		
D0363	Cone beam-3D multi img reconst	Cn3dlmgRc			1	High Produc		Mouth		
D0415	Collection of microorg culture	BactStud			1	High Produc		Mouth		
D0416	Viral Culture	VriCultr			1	High Produc		Mouth		
D0417	Collection of saliva sample	CltSaliva			1	High Produc		Mouth		
D0418	Analysis of saliva sample	AnlSaliva			1	High Produc		Mouth		
D0421	Genetic test-suscept oral dis	GenetTest			1	High Produc		Mouth		
D0425	Caries susceptibility tests	CarisTest			1	High Produc		Mouth		
D0431	Adjunc pre-diag test-detect muc	TestMucAb			1	High Produc		Mouth		
D0460	Pulp vitality tests	PulpVitTe			1	High Produc		Mouth		
D0470	Diagnostic casts	DiagCasts			1	High Produc		Mouth		
D0471	Diagnostic photographs	DiagPhoto			1	High Produc		Mouth		
D0472	Accession of tiss, gr exam/rpt	AcTisExam			1	Medium Pro		Mouth		
D0473	Acc of tissue, gr mic exam/rpt	AcTisGrEx			1	Medium Pro		Mouth		
D0474	Acc of tiss-gr mic ex surg mar	AcTisDsEx			1	Medium Pro		Mouth		
D0475	Decalcification Procedure	DecalcPrc			1	High Produc		Mouth		
D0476	Special stains for microorg	StnsMicro			1	High Produc		Mouth		
D0477	Special stains-not for microorg	StnsNotMi			1	High Produc		Mouth		
D0478	Immunohistochemical stains	ImmunStns			1	High Produc		Mouth		

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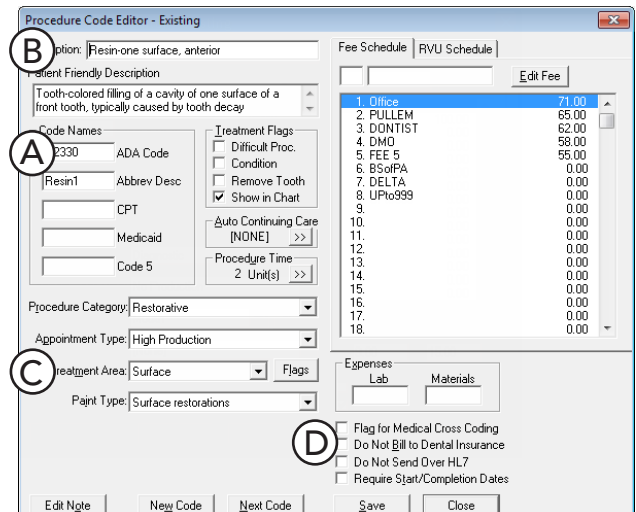
How do I run the Procedure Code List?

From the Office Manager, from the **Reports** menu, point to **Reference**, and then click **Procedure Code List**. For additional details about running this report, see the "Procedure Code List" topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

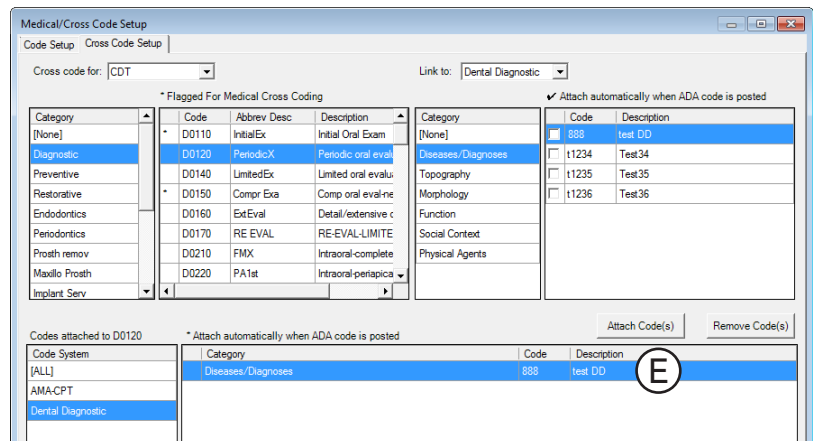
What important information does this report provide?

The following report information (with the exception of letters E and F) is found in the **Procedure Code Editor** dialog box, which can be accessed in the Office Manager. See the topics for "Procedure Code Setup" in the Office Manager portion of the Dentrix Enterprise Help for details on how to edit this information.

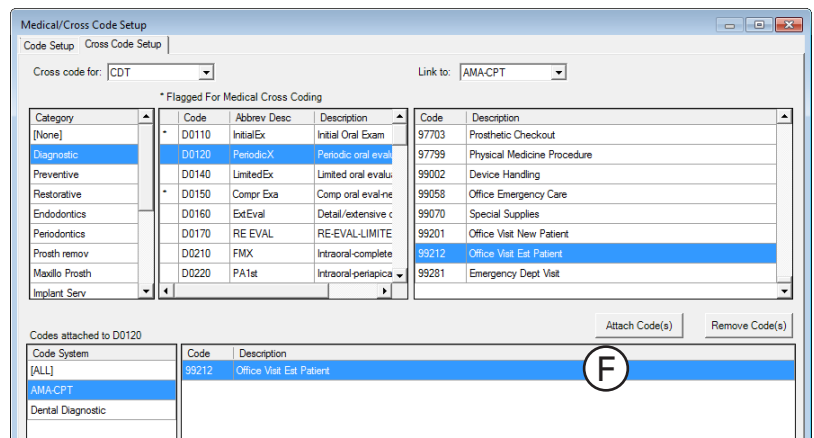
- A. Code** – The ADA code associated with a procedure.
- B. Description** – The procedure's description.
- C. Treat** – The procedure's treatment area.
- D. INS** – Indicates whether or not a procedure is set to be billed to insurance.



- E. Included Dental Diagnostic Codes** – The dental diagnostic codes associated with each procedure code. This information is found in the **Medical/Cross Code Setup** dialog box. Dental diagnostic cross coding must be set up for dental diagnostic codes to appear on this report. See the "Dental diagnostic cross coding" topic in the Dentrix Enterprise Help for details about how to set up dental diagnostic cross coding.



- F. Included AMA CPT Codes** – The AMA and CPT codes associated with each procedure code. This information is found in the **Medical/Cross Code Setup** dialog box. Medical cross coding must be set up for AMA and CPT codes to appear on this report. See the "Medical cross coding" topic in the Dentrix Enterprise Help for details on how to set up medical cross coding.



Procedures Not Attached to Insurance Report

The Procedures Not Attached to Insurance Report displays insured patients with completed procedure(s) that have not had an insurance claim created for the procedure(s).

\$	Why: To ensure procedures are billed to a patient's insurance
	When: Daily

Procedures Not Attached to Insurance							
Either Date Range: 04/01/2018 - 05/04/2018 Patient Range: <ALL> - <ALL> Clinics: <ALL> Providers: <ALL> Billing Types: <ALL>							
Report Date: 05/04/2018		Report Generated By: enterprise			B	Page 1 of 1	
PATIENT NAME	DATE	TOOTH	CODE	BT DESCRIPTION	AMOUNT	EXPIRES	CLINIC PROVIDER
Abbott, James S				2	Total: 3,029.00		
	04/22/2018	5	D6970	Post/core + brdg retainer, fabr	230.00	07/21/2018	CENTRAL DDS1
	04/22/2018		D1110	Prophylaxis-adult	90.00	07/21/2018	CENTRAL DDS1
	04/22/2018		D0120	Periodic oral evaluation	30.00	07/21/2018	CENTRAL DDS1
	04/22/2018		D0274	Bitewings-four films	250.00	07/21/2018	CENTRAL DDS1
	04/22/2018		D0330	Panoramic film	158.00	07/21/2018	CENTRAL DDS1
	04/23/2018	6	D7110	Extraction-single tooth	71.00	07/22/2018	CENTRAL DDS2
	04/27/2018	25*26	D5214	Mand partial-metal base w/sdls	898.00	07/26/2018	CENTRAL DDS1
	05/01/2018	12	D5214	Mand partial-metal base w/sdls	801.00	07/30/2018	CENTRAL DDS2
	05/01/2018	13	D7111	Extraction crnl remnts-decid th	501.00	07/30/2018	CENTRAL DDS2
Abbott, Patricia				2	Total: 1,100.00		
	04/23/2018		D3221	Pulpal debridemnt-prim/perm th	1,100.00	04/23/2019	CENTRAL DDS1
Gleason, Gary				1	Total: 300.00		
	04/23/2018		D1110	Prophylaxis-adult	300.00	07/22/2018	DRAPER DDS1
Little, Brian				1	Total: 125.00		
	04/23/2018		D1110	Prophylaxis-adult	125.00	07/22/2018	DRAPER DDS1
Little, Carol				1	Total: 127.00		
	04/22/2018	12	D2150	Amalgam-2 surf. prim/perm	156.00	04/22/2019	CENTRAL DDS1
	04/23/2018	12	D7120	Extraction-each additional	71.00	04/23/2019	CENTRAL DDS1
Perkins, Peggy				1	Total: 2,160.00		
	04/23/2018	9	D6010	Surg place implant: endosteal	780.00	10/20/2018	CENTRAL DDS1
	04/23/2018	4	D2750	Crown-porc fuse high noble mtl	78.00	10/20/2018	CENTRAL DDS1
	05/01/2018	15	D5214	Mand partial-metal base w/sdls	801.00	10/28/2018	CENTRAL DDS3
	05/01/2018	9	D7111	Extraction crnl remnts-decid th	501.00	10/28/2018	CENTRAL DDS3
Smith, Michael				1	Total: 1,377.00		
	04/27/2018		D9310	Consultation-per session	75.00	10/24/2018	CENTRAL DDS1
	05/01/2018	12	D5214	Mand partial-metal base w/sdls	801.00	10/28/2018	CENTRAL DDS1
	05/01/2018	7	D7111	Extraction crnl remnts-decid th	501.00	10/28/2018	CENTRAL DDS1
Taylor, Kerri L				1	Total: 69.00		
	04/23/2018	4	D2386	Resin-2 surface, post-permanent	69.00	10/20/2018	CENTRAL DDS2
Winters, Carl				1	Total: 105.56		
	04/23/2018		D8690	Ortho treatment (bill/contract)	105.56	04/23/2019	CENTRAL DDS1

A

C COMPLETED PROCEDURES TOTAL: **8,492.56**

How do I run the Procedures Not Attached to Insurance Report?

From the DXOne Reporting module, select **Ledger**, and then double-click **Procedures Not Attached to Insurance**. For additional details about running this report, see the “Procedures Not Attached to Insurance Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Procedure Details** – The patient’s name, procedure date, tooth number(s) involved in the procedure, procedure code, description, and procedure total.
- B. Expires** – The deadline for submitting a claim for the procedure.
- C. Total** – The total amount of the completed procedures included on the report.

Production Summary Report

The Production Summary Report displays production for procedures that have been posted to the Ledger.

Why: To compare procedure production statistics, to print a record of transactions each day, to review production totals for a date or date range

When: Yearly, at the beginning of each budgeting cycle, or daily (the frequency depends on how the report is run)

Production Summary						
05/05/2018 - 05/05/2018 Procedure Date						
Clinics: <ALL>						
Provider: <ALL>						
Billing Types: <ALL>						
Report Date: 05/05/2018		Report Generated By: enterprise			Page 1 of 1	
Procedure Date	Entry Date	Patient Name	BT	Description	Amount	
		Quantity	Total	Average	Percent	
05/05/2018	05/05/2018	Abbott, James S	2	D5214 - Mand partial-metal base w/sdls		801.00
05/05/2018	05/05/2018	Little, Brian	1	D2386 - Resin-2 surface, post-permanent		120.00
05/05/2018	05/05/2018	Little, Brian	1	D2761 - Crown Insert		110.00
05/05/2018	05/05/2018	Little, Brian	1	D2752 - Crown-porc fused noble metal		110.00
05/05/2018	05/05/2018	Little, Brian	1	D2954 - Prefab post&core in add to cm		110.00
05/05/2018	05/05/2018	Perkins, Peggy	1	D6240 - Pontic-porcelain fused to hnob		200.00
05/05/2018	05/05/2018	Perkins, Peggy	1	D6750 - Retainer cm-porc fused-hi nob		200.00
05/05/2018	05/05/2018	Perkins, Peggy	1	D6750 - Retainer cm-porc fused-hi nob		200.00
05/05/2018	05/05/2018	Perkins, Peggy	1	D6240 - Pontic-porcelain fused to hnob		200.00
GRAND TOTALS:						
		0	0.00	0.00	0.00%	
Medicaid						
Non-Medicaid		9	2,051.00	227.89	100.00%	
Total		9	2,051.00	227.89	100.00%	

A

B

C

DDS1						
CENTRAL						
05/05/2018	05/05/2018	Little, Brian	1	D2386 - Resin-2 surface, post-permanent		120.00
05/05/2018	05/05/2018	Little, Brian	1	D2761 - Crown Insert		110.00
05/05/2018	05/05/2018	Little, Brian	1	D2752 - Crown-porc fused noble metal		110.00
05/05/2018	05/05/2018	Little, Brian	1	D2954 - Prefab post&core in add to crn		110.00
05/05/2018	05/05/2018	Perkins, Peggy	1	D6240 - Pontic-porcelain fused to hnob		200.00
05/05/2018	05/05/2018	Perkins, Peggy	1	D6750 - Retainer crn-porc fused-hi nob		200.00
05/05/2018	05/05/2018	Perkins, Peggy	1	D6750 - Retainer crn-porc fused-hi nob		200.00
05/05/2018	05/05/2018	Perkins, Peggy	1	D6240 - Pontic-porcelain fused to hnob		200.00
CENTRAL						
Medicaid		0		0.00	0.00	0.00%
Non-Medicaid		8		1,250.00	156.25	100.00%
Total		8		1,250.00	156.25	100.00%

DDS1						
Medicaid		0		0.00	0.00	0.00%
Non-Medicaid		8		1,250.00	156.25	100.00%
Total		8		1,250.00	156.25	60.95%

D

CENTRAL						
DDS1						
05/05/2018	05/05/2018	Little, Brian	1	D2386 - Resin-2 surface, post-permanent		120.00
05/05/2018	05/05/2018	Little, Brian	1	D2761 - Crown Insert		110.00
05/05/2018	05/05/2018	Little, Brian	1	D2752 - Crown-porc fused noble metal		110.00
05/05/2018	05/05/2018	Little, Brian	1	D2954 - Prefab post&core in add to crn		110.00
05/05/2018	05/05/2018	Perkins, Peggy	1	D6240 - Pontic-porcelain fused to hnob		200.00
05/05/2018	05/05/2018	Perkins, Peggy	1	D6750 - Retainer crn-porc fused-hi nob		200.00
05/05/2018	05/05/2018	Perkins, Peggy	1	D6750 - Retainer crn-porc fused-hi nob		200.00
05/05/2018	05/05/2018	Perkins, Peggy	1	D6240 - Pontic-porcelain fused to hnob		200.00
DDS1						
Medicaid		0		0.00	0.00	0.00%
Non-Medicaid		8		1,250.00	156.25	100.00%
Total		8		1,250.00	156.25	60.95%

DDS2						
05/05/2018	05/05/2018	Abbott, James S	2	D5214 - Mand partial-metal base w/sdls		801.00
DDS2						
Medicaid		0		0.00	0.00	0.00%
Non-Medicaid		1		801.00	801.00	100.00%
Total		1		801.00	801.00	39.05%

CENTRAL						
Medicaid		0		0.00	0.00	0.00%
Non-Medicaid		9		2,051.00	227.89	100.00%
Total		9		2,051.00	227.89	100.00%

How do I run the Production Summary Report?

From the DXOne Reporting module, select **Analysis**, and then double-click **Production Summary**. For additional details about running this report, see the “Production Summary Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report can be grouped and subtotaled by provider with a breakdown by clinic. Or, the report can be grouped and subtotaled by clinic with a breakdown by provider. The following information can be used to monitor production for each provider and/or clinic:

A. Procedures – The procedures posted to the Ledger are listed if **Include Patient Detail** is selected when setting up the options to run this report. Each procedure provides the following information:

- **Entry Date** – The date a procedure is posted to the Ledger.
- **Procedure Date** – The date a procedure is posted to the Chart.

Note: It is essential that you understand the difference between Entry Dates and Procedure Dates. For details about these dates, see the “Tips for Understanding Dentrix Enterprise Reports” section in the Introduction of this book.

- **Patient Name** – The name of the patient on whom the procedure was performed.
- **Code and Description** – The ADA code and description of the procedure.
- **Amount** – The fee for the procedure posted in the Ledger.

B. Grand Totals – The Grand Totals section displays the following information:

- **Quantity** – The number of procedures posted during the date range of the report.
- **Total** – The total amount of the procedures billed for the procedures.

Note: This amount is not affected by payment adjustments (for example, if \$500 was posted for a procedure, but the patient was given a \$400 charity care adjustment, \$500 would be used to calculate the procedure total).

- **Average** – The average amount charged for a procedure (Total / Quantity).
- **Percent** – The Total divided by the Total Production Charges. The percent column assists you in comparing procedures. The higher the percentage, the more money the procedure is bringing into the office.
- **Medicaid Totals** – If **Separate Totals for Medicaid and Non-Medicaid Patients** is selected when setting up options to run this report, the Grand Totals section will divide up the Totals to reflect production from patients with Medicaid and those without Medicaid.
- **Totals** – The combined amounts of the Medicaid and Non-Medicaid totals.

C. Provider Totals – The production is shown for the provider with a breakdown of the procedures for each clinic the provider works in. Each clinic’s production is subtotaled. After the clinic subtotals, a totals summary for the provider appears.

D. Clinic Totals – The production is shown for the clinic with a breakdown of the procedures performed by each provider at that clinic. Each provider’s production is subtotaled. After the provider subtotals, a totals summary for the clinic appears.

Provider A/R Totals - Daily Report

The Provider A/R Totals - Daily Report displays daily production totals. For additional information on this report, see the "Provider A/R Totals - Standard Report" on page 266.

\$	Why: To view daily production totals for a date range
	When: As needed

Report Date: 04/23/2018		Report Generated By: enterprise								Page 1 of 2		
Beginning Balance	Production					Collection				Ending Balance	Net Change	% Collected
	Charges	+Adj	-Adj	Total		Payments	+Adj	-Adj	Total			
Debit Initial Balances	Debit Special Adjustments	Finance Charges	Late Charges	Insurance Payments	Credit Initial Balances	Credit Special Adjustments						
04/22/2018												
2,205.00	386.00	10.00	0.00	417.00	-30.20	0.00	-20.00	-50.20	2,571.80	366.80	12.04%	
0.00	0.00	0.00	21.00	0.00	0.00	0.00	0.00	0.00				
04/23/2018												
2,571.80	0.00	0.00	0.00	8,262.00	0.00	0.00	0.00	0.00	10,833.80	8,262.00	0.00%	
0.00	0.00	332.00	7,930.00	0.00	0.00	0.00	0.00	0.00				
GRAND TOTALS												
2,205.00	386.00	10.00	0.00	8,679.00	-30.20	0.00	-20.00	-50.20	10,833.80	8,628.80	0.58%	
0.00	0.00	332.00	7,951.00	0.00	0.00	0.00	0.00	0.00				

DDS1												
04/22/2009												
1,722.00	386.00	10.00	0.00	417.00	-23.00	0.00	-10.00	-33.00	2,106.00	384.00	7.91%	
0.00	0.00	0.00	0.00	21.00	0.00	0.00	0.00	0.00				
04/23/2009												
06.00	0.00	0.00	0.00	8,262.00	0.00	0.00	0.00	0.00	10,368.00	8,262.00	0.00%	
0.00	0.00	332.00	7,930.00	0.00	0.00	0.00	0.00	0.00				
1,722.00	386.00	10.00	0.00	8,679.00	-23.00	0.00	-10.00	-33.00	10,368.00	8,646.00	0.38%	
0.00	0.00	332.00	7,951.00	0.00	0.00	0.00	0.00	0.00				

Production Adjustments				Collection Adjustments			
04: +Debit Adjustment				01: -Professional Discount			
05: +Patient Refund				02: -Cash Discount			
				03: -Credit Adjustment			
				06: -Write-Off			

How do I run the Provider A/R Totals - Daily Report?

From the DXOne Reporting module, select **Management**, and then double-click **Provider A/R Totals**. For additional details about running this report, see the “Provider Accounts Receivable Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report can be grouped and subtotaled by initial or rendering provider with a daily A/R breakdown. The report contains the following information.

- A. Daily Break Down** – A daily breakdown of production totals.
- B. Standard Provider A/R Totals** – Standard provider accounts receivable totals. See the “Provider A/R Totals - Standard Report” on page 266 for details about each column on this report.
- C. Grand Totals** – The combined daily production totals for all providers on the report.
- D. Provider Totals** – If **Initial Provider** or **Rendering Provider** is selected when setting up options to run this report, the totals are grouped and subtotaled by initial or rendering provider.
- E. Adjustment Types List** – If you select **Include Adjustment Types List** when setting options for running this report, the Adjustment Types List appears on the report. This list identifies whether an adjustment type has been set as a Production or Collections adjustment for the report.

Provider A/R Totals - Standard Report

The Provider A/R Totals - Standard Report displays production totals. This report is more accurate than other production reports because it takes into account production and collection adjustments. For example, if a procedure was posted for \$1000, but a \$900 Charity Care credit was given to the patient, the Production A/R Totals Report will show the procedure produced \$100 in revenue, rather than \$1000.

\$	Why: To view production totals for a date range When: Yearly, and monthly or weekly
-----------	--

Note: For accurate reporting, follow these recommendations:

- Post charge (production) and credit (collections) adjustments properly.
- Close your books nightly.
- Look at the net production figures within the date range of the report.
- To see where allocations occur, you can run the Provider Revenue Report.

PROVIDER A/R - STANDARD												
04/30/2018 - 04/30/2018 Procedure Date												
Clinics: <ALL>												
Providers: AMCCLURE, DDS01, DDS1, DDS2												
Billing Type: <ALL>												
Report Date: 04/30/2018				Report Generated By: enterprise				Page 1 of 2				
Beginning Balance	Production				Collection				Ending Balance	Net Change	% Collected	
	Charges	+Adj	-Adj	Total	Payments	+Adj	-Adj	Total				
Debit Initial Balances	Debit Special Adjustments	Finance Charges	Late Charges	Insurance Payments	Credit Initial Balances	Credit Special Adjustments						
AMCCLURE												
7,843.00	100.00	0.00	0.00	100.00	0.00	0.00	0.00	0.00	7,943.00	100.00	0.00%	
	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00				
DDS01												
90.00	180.00	0.00	0.00	1,690.00	-38.00	0.00	0.00	-38.00	1,742.00	1,652.00	2.25%	
	1,510.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00				
DDS1												
1,187.00	4,920.56	100.00	0.00	13,325.56	-132.00	0.00	-10.00	-945.40	13,567.16	12,380.16	7.09%	
	0.00	0.00	354.00	7,951.00	-803.40	0.00	0.00	0.00				
DDS2												
	552.00	0.00	0.00	552.00	-7.20	0.00	-10.00	-17.20				
	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00				
GRAND TOTALS												
9,120.00	5,752.56	100.00	0.00	15,667.56	-177.20	0.00	-20.00	-1,000.60	23,786.96	14,666.96	6.39%	
	1,510.00	0.00	354.00	7,951.00	-803.40	0.00	0.00	0.00				

Production Adjustments	Collection Adjustments
04: +Debit Adjustment	01: -Professional Discount
05: +Patient Refund	02: -Cash Discount
	03: -Credit Adjustment
	06: -Write-Off

How do I run the Provider A/R Totals - Standard Report?

From the DXOne Reporting module, select **Management**, and then double-click **Provider A/R Totals**. For additional details about running this report, see the "Provider A/R Totals Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Beginning Balance – The outstanding amount that is owed to the provider/clinic at the end of the day prior to the beginning date range of the report.

B. Production

- **Charges** – The total charges for the provider/office within the date range.
- **Debit Initial Balances** – The total positive initial balances entered from the Ledger.
- **+ Adj** – The total production adjustments that increase (debit) accounts receivable. This amount does not include debit initial balances, debit special adjustments, finance charges, and late charges.
- **Debit Special Adjustments** – The total debit adjustments made during the editing of family relations from the Family File.
- **- Adj** – The total production adjustments that reduce (credit) accounts receivable.
- **Finance Charges** – The total finance charges for payment agreements.
- **Late Charges** – The total late fees for delinquent payments.
- **Total** – The total production.

C. Collection

- **Payments** – The total payments for the provider/office within the date range.
- **Insurance Payments** – The total payments from insurance companies for the provider/office within the date range.
- **+ Adj** – The total collection adjustments that increase (debit) accounts receivable.
- **Credit Initial Balances** – The total negative initial balances entered from the Ledger.
- **- Adj** – The total collection adjustments that decrease (credit) accounts receivable.
- **Credit Special Adjustments** – The total credit adjustments made during the editing of family relations from the Family File.

D. Ending Balance – The outstanding amount that is owed to the provider/clinic at the end date of the report.

E. Net Change – The difference between the Beginning Balance and Ending Balance (or between Production and Collections).

F. % Collected – The percentage of collections (the Production Total divided by the Collections Total) within the date range of the report.

G. Provider and Grand Totals – According to the **Group By** option selected when setting options for this report, the totals can be grouped by initial or rendering provider. The grand totals of all providers on the report also appear.

H. Adjustment Types List – If you select **Include Adjustment Types List** when setting options for running this report, the Adjustment Types List appears on the report. This list identifies whether an adjustment type has been set as a production or collections adjustment for the report.

Grouping and Clinic Selection Scenarios

Keep the following in mind when setting up the options for the Provider A/R Totals Report:

- When grouping the report by **Initial Provider**:
 - The **Collecting Clinic** and **Rendering Clinic** options are not available.
 - The report uses the **Collecting Clinic** for credits and the **Rendering Clinic** for charges.
- When using **No Group By** for the report (or grouping the report by something other than the initial provider):
 - Regardless of whether **Collecting Clinic** or **Rendering Clinic** is selected, the report always uses the **Rendering Clinic** for charges.
 - With **Collecting Clinic** selected, the report uses the **Collecting Clinic** for credits.
 - With **Rendering Clinic** selected, the report uses the **Rendering Clinic** for credits.
- Make sure the **Adjustment Types** for the report are set up correctly:
 - The adjustment types that affect production are assigned to **Production Adjustments**.
 - The adjustment types that affect collections are assigned to **Collection Adjustments**.

Report Type: Standard Summary, Daily Summary

Group By: No Group By, Initial Provider, Rendering Provider

Select Clinic: Collecting Clinic, Rendering Clinic

Select Provider: All

Report Type: Standard Summary, Daily Summary

Group By: No Group By, Initial Provider, Rendering Provider

Select Clinic: Collecting Clinic, Rendering Clinic

Select Provider: All

Allocation Date: Allocation Date, Credit's Procedure/Entry Date

Select Billing Type: All

Adjustment Types

Assign Adjustment Types

Production Adjustments	Collection Adjustments
001: +Carecredit Refund	003: -Credit Adjustment
002: +Patient Refund	005: -Professional Courtesy
004: +Debit Adjustment	006: -Write-Off
007: +CorrectedTreatment	008: -Corrected Treatment
009: +Credit Adjustment	011: -Account Transfer
010: +Account Transfers	015: -Cash Discount
012: +NSF (Return Check)	017: -Credit Transfer
013: +Neshat Debit Balance	018: -Returned Check
014: +Unicorn Refund	019: -Neshat Credit Balance
016: +Credit Transfer	021: -Initial Credit Balance Forward
020: -Initial Balance Forward	024: -PPD Adjustment
022: +CAP ADJUSTMENT	027: -Medicaid test negative
023: +SUPPLEMENTAL ADJUSTMENT	031: -Professional Discount
025: +NESHAT REFUND	
026: +Medicaid test positive	
028: +Insurance Refund	
029: +Reverse Prior Adjustment	
030: +Credit Card Refund	

OK Cancel

Beginning Balance

A charge or applied credit is included according to the following criteria:

Initial Provider	No Group By	
	Collecting Clinic	Rendering Clinic
Ending Balance, plus Credits, minus Charges	Ending Balance, plus Credits, minus Charges	One of the following types: <ul style="list-style-type: none"> • Completed Procedure Codes • Charge Adjustments • Finance Charges • Charge Special Adjustments • Charge Initial Balances
		Charges minus Applied Credits
		(Charge only) The provider is one of the specified providers
		(Charge only) The amount is greater than zero
		(Charge only) The entry date or procedure date is before the beginning date of the specified range
		(Credit only) The allocation date is before the beginning date of the specified range (Entry or procedure date is ignored)
		The corresponding charge meets the criteria to be included on the report
		(Credit only) Applied to a completed procedure for an ADA code not being excluded
The corresponding procedure meets the criteria to be included on the report		

Charges (Production)

A transaction is included as a charge on the report according to the following criteria:

Initial Provider	No Group By	
	Collecting Clinic	Rendering Clinic
One of the following types: <ul style="list-style-type: none"> • Completed Procedures • Charge Adjustments (+Adj or –Adj, depending on production adjustment types specified) • Finance Charges • Debit Special Adjustments • Late Charges • Debit Initial Balances 		
The amount is greater than zero		
The entry date or procedure date is within the specified range		
The billing type of the family is one of the specified billing types		
The rendering clinic is one of the specified clinics		
The patient has an initial provider	The provider is one of the specified providers	The provider is one of the specified providers
(Completed procedure only) The ADA code is not being excluded		

Credits (Collection)

A transaction is included as a credit on the report according to the following criteria:

Initial Provider	No Group By	
	Collecting Clinic	Rendering Clinic
One of the following types: <ul style="list-style-type: none"> • (Guarantor) Payments • Credit Adjustments (+Adj or –Adj, depending on the collection adjustment types specified) • Insurance Payments • Credit Special Adjustments • Credit Initial Balances 		
The amount is less than zero (The full amount of the credit)	The amount is less than zero (The applied amount only)	The amount is less than zero (The applied amount only)
The entry date or procedure date is within the specified range	The allocation date is within the specified range (Entry or procedure date is ignored)	The allocation date is within the specified range (Entry or procedure date is ignored)
The billing type of the family is one of the specified billing types		
The rendering clinic is one of the specified clinics	The collecting clinic is one of the specified clinics	The rendering clinic is one of the specified clinics
The patient has an initial provider	The provider is one of the specified providers	The provider is one of the specified providers
Ignores ADA code exclusions	Applied to a completed procedure for an ADA code not being excluded	Applied to a completed procedure for an ADA code not being excluded


Ending Balance

A charge or credit is included according to the following criteria:

Initial Provider	No Group By	
	Collecting Clinic	Rendering Clinic
One of the following types: <ul style="list-style-type: none"> • Completed Procedure Codes • Guarantor Payments • Charge Adjustments • Credit Adjustments • Insurance Payments • Finance Charges • Charge Special Adjustments • Credit Special Adjustments • Late Charges • Charge Initial Balances 	One of the following types: <ul style="list-style-type: none"> • Completed Procedure Codes • Charge Adjustments • Finance Charges • Charge Special Adjustments • Charge Initial Balances 	Beginning Balance, minus Credits, plus Charges
Charges plus Credits	Charges minus Applied Credits	
The patient has an initial provider	(Charge only) The provider is one of the specified providers	
	(Charge only) The amount is greater than zero	
The entry date or procedure date is on or before the ending date of the specified	(Charge only) The entry date or procedure date is on or before the ending date of the specified range	
	(Credit only) The allocation date is on or before the ending date of the specified range (Entry or procedure date is ignored) The corresponding charge meets the criteria to be included on the report	
The billing type of the family is one of the specified billing types		
The rendering clinic is one of the specified clinics	The collecting clinic is one of the specified clinics	
(Completed procedure only) The ADA code is not being excluded	(Completed procedure only) The ADA code is not being excluded	
	(Credit only) Applied to a completed procedure for an ADA code not being excluded The corresponding procedure meets the criteria to be included on the report	

Provider IDs List

The Provider IDs List displays information about each provider and the insurance carriers for which each provider has an ID.



Why: To ensure claim forms populate with the correct provider ID

When: After Dentrix Enterprise setup, and as needed

PROVIDER IDS LIST

Insurance Carriers: <ALL> - <ALL>
 Clinics: <ALL>
 Providers: <ALL>

Report Date: 04/22/2018 Report Generated By: enterprise Page 1 of 4

Provider Name: McClure, Angela
Address: P.O. Box 123456
 Hartford, CT 06104

Title: Dr.
ID: AMCCLURE
Clinic: MESA
Phone: (800) 555-4343
BC/BS ID#: 1234567
Specialty: Dentist
Provider Class: Primary

SS#: 000-00-0000
FEE Schedule: 1: Office
RVU Schedule: <Not Assigned>

State ID#: 123456
TIN#: 000000000
Medicaid#: 12345
DrugID#:
Provider#:
Office#:
NPI: 0

Clinic: CENTRAL

Dental Carrier: Connecticut General
Address: P.O. Box 1234
 Hartford, CT 06104
Phone: (800) 555-4343
Contact:

Clinic TIN#:

Group Name: Acme Insurance Group
Group #: 1234567
Local (Union):

Employer: Acme Inc
Payor ID:

Provider ID Code: _____
 0B State License Number

Provider ID Number: _____
 1234a1234b

Provider Name: Smith, Dennis
Address: 123456 Street Name
 City, UT 84003

Title: Dr
ID: DDS01
Clinic: CENTRAL
Phone:
BC/BS ID#:
Specialty: Dentist
Provider Class: Primary

SS#:
FEE Schedule: 1: Office
RVU Schedule: 1

State ID#:
TIN#:
Medicaid#:
DrugID#:
Provider#:
Office#:
NPI:

Clinic: CENTRAL

Dental Carrier: Aethna
Address: 123456 Street Name
 City, UT 84003
Phone:
Contact:

Clinic TIN#:

Group Name: HSPS A
Group #:
Local (Union):

Employer:
Payor ID:

Provider ID Code: _____
 0B State License Number

Provider ID Number: _____
 12345abc678def

Dental Carrier: Aethna
Address: 12345 Street Name

Group Name: HSPS B
Group #:
Local (Union):

How do I run the Provider IDs List?

From the DXOne Reporting module, select **Reference**, and then double-click **Provider IDs List**. For additional details about running this report, see the “Provider IDs List” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Provider Details – Displays general information about each provider, including important numbers associated with the provider. This information is found in the **Provider Information** dialog box, which can be accessed from the Office Manager module. For details about how to edit this information, see the “Adding, editing, inactivating, and reactivating providers” topic in the Dentrix Enterprise Help.

B. Clinics – The clinics to which a provider has been assigned.


C. Carrier Details – Displays general information about each insurance carrier for which a provider ID has been entered. Insurance carrier information is found in the **Dental Insurance Plan Information** dialog box, which can be accessed from the Office Manager. For details about how to enter provider IDs, see the “Adding and editing insurance plans” topic in the Dentrix Enterprise Help.

D. Provider ID Details – Displays the provider’s ID code and number that has been entered for the insurance carrier. Provider ID information is found in the **Provider ID Setup** dialog box, which can be accessed from the Office Manager. For details on how to enter provider IDs, see the “Adding and editing insurance plans” topic in the Dentrix Enterprise Help.

OB State License Number	Provider ID Code	Provider ID Number	Clinic
[]	[]	12345abc678def	MESA

Provider Revenue - Allocations Report

The Provider Revenue Detail for Allocations Report lists payments and credits allocated to charges that have been posted for each provider.

	Why: To have a record of revenue generated by each provider, to view the payments and adjustments that are being applied to charges, and to ensure correct allocation of payments and credits to procedures that have been performed
	When: Daily

Provider Revenue Detail for Allocations							
Date Range: 01/07/2018 - 04/23/2018 Include Allocations: <ALL> Guarantor Range: <ALL> - <ALL> Clinics: <ALL>-(Collecting) Providers: <ALL> Billing Type: <ALL> Adjustment Type(s): <ALL> Payment Type(s): <ALL>							
Report Date: 04/23/2018		Report Generated By: enterprise				Page 1 of 1	
Entry Date	Proc Date	Patient Name	Description	Amount	BT	Clinic	
Provider: DDS1							
Allocate Date: 04/22/2018				Allocated Amount:		10.00	
04/22/2018	04/22/2018	Larson, Bill	D2150:Amalgam-2 surf. prim/perm	156.00	1	CENTRAL	
04/22/2018	04/22/2018	Larson, Bill <Family>	-Professional Discount	-10.00	1	CENTRAL	
Allocate Date: 04/22/2018				Allocated Amount:		23.00	
04/22/2018	04/22/2018	Larson, Bill	D2150:Amalgam-2 surf. prim/perm	156.00	1	CENTRAL	
04/22/2018	04/22/2018	Larson, Bill <Family>	Check Payment - Thank You	-23.00	1	CENTRAL	
DDS1-		<i>Insurance:</i>	0.00	<i>Non-Insurance:</i>	23.00	<i>Credit Adjustments:</i>	10.00
				<i>Total:</i>	33.00		
Provider: DROBB							
Allocate Date: 04/22/2018				Allocated Amount:		9.60	
01/07/2018	01/07/2018	Abbott, James S	D1110:Prophylaxis-adult	48.00	2	CENTRAL	
04/22/2018	04/22/2018	Abbott, Patricia <Family>	Check Payment - Thank You	-125.00	2	CENTRAL	
Allocate Date: 04/22/2018				Allocated Amount:		108.20	
01/15/2018	01/15/2018	Abbott, James S	D8670:Periodic ortho visit (contract)	950.00	2	CENTRAL	
04/22/2018	04/22/2018	Abbott, Patricia <Family>	Check Payment - Thank You	-125.00	2	CENTRAL	
DROBB-		<i>Insurance:</i>	0.00	<i>Non-Insurance:</i>	117.80	<i>Credit Adjustments:</i>	0.00
				<i>Total:</i>	117.80		
Grand Totals-		<i>Insurance:</i>	0.00	<i>Non-Insurance:</i>	140.80	<i>Credit Adjustments:</i>	10.00
				<i>Total:</i>	150.80		

- A
- B
- C
- D
- E

How do I run the Provider Revenue - Allocations Report?

From the DXOne Reporting module, select **Ledger**, and then double-click **Provider Revenue**. For additional details about running this report, see the "Provider Revenue Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

For each provider, each allocation is listed with the corresponding charge, and payments and/or credit adjustments.

- A. Allocation** – The date the allocation was posted and the amount that was allocated to a charge appear.
- B. Charge** – For the charge, the following details appear: entry date, procedure date, patient name, procedure description, amount, billing type, and clinic (where service was rendered).
- C. Payment/Credit** – For each payment or credit, the following details appear: entry date, procedure date, patient name, payment/credit adjustment description, amount, date the amount was allocated to the charge, amount allocated to the charge, billing type, and collecting/rendering clinic.

Note: It is essential that you understand the difference between Entry Dates and Procedure Dates. For details on these dates, see the "Tips for Understanding Dentrix Enterprise Reports" section in the Introduction of this book.

- D. Provider Totals** – The insurance and non-insurance payments, credit adjustments, and total revenue (which is the sum of the payments and credits) for the provider.
- E. Grand Totals** – The totals for all providers on the report.

Provider Revenue - Charges Report

The Provider Revenue Detail for Charges Report lists payments and credits allocated to charges that have been posted for each provider.

\$	Why: To have a record of revenue generated by each provider, to view the payments and adjustments that are being applied to charges, and to ensure correct allocation of payments and credits to procedures that have been performed
	When: Daily

Provider Revenue Detail for Charges							
Date Range: 04/01/2018 - 05/05/2018 Include Allocations: <ALL> Guarantor Range: <ALL> - <ALL> Clinics: <ALL>(Collecting) Providers: <ALL> Billing Type: <ALL> Adjustment Type(s): <ALL> Payment Type(s): <ALL>							
Report Date: 05/05/2018		Report Generated By: enterprise			Page 1 of 1		
Entry Date	Proc Date	Patient Name	Description	Amount	Alloc Date	Alloc Amt	BT Clinic
Provider: DDS01							
04/23/2018	04/23/2018	Payne, Scott	D2160:Amalgam-3 surf. prim/perm	90.00			1 CENTRAL
04/23/2018	04/23/2018	Payne, Mildred <Family>	Check Payment - Thank You	-20.00	04/23/2009	20.00	1 CENTRAL
04/27/2018	04/27/2018	Payne, Mildred <Family>	Cash Payment - Thank You	-100.00	04/27/2009	18.00	1 CENTRAL
DDS01- Insurance: 0.00 Non-Insurance: 38.00 Credit Adjustments: 0.00 Total: 38.00							
Provider: DDS1							
04/22/2018	04/22/2018	Larson, Bill	D2150:Amalgam-2 surf. prim/perm	156.00			1 CENTRAL
04/22/2018	04/22/2018	Larson, Bill <Family>	Check Payment - Thank You	-23.00	04/22/2009	23.00	1 CENTRAL
04/22/2018	04/22/2018	Larson, Bill <Family>	-Professional Discount	-10.00	04/22/2009	10.00	1 CENTRAL
04/23/2018	04/23/2018	Larson, Bill	D7120:Extraction-each additional	71.00			1 CENTRAL
05/05/2018	05/05/2018	Larson, Bill	Insurance Payment	-71.00	05/05/2009	71.00	1 CENTRAL
04/23/2018	04/23/2018	Payne, Mildred <Family>	Finance Charge	100.00			1 CENTRAL
04/27/2018	04/27/2018	Payne, Mildred <Family>	Cash Payment - Thank You	-100.00	04/27/2009	82.00	1 CENTRAL
04/30/2018	04/30/2018	Larson, Bill <Family>	+Debit Adjustment	90.00			1 CENTRAL
04/29/2018	04/22/2018	Larson, Bill <Family>	Cash Payment - Thank You	-20.00	04/30/2009	20.00	1 CENTRAL
DDS1- Insurance: 71.00 Non-Insurance: 125.00 Credit Adjustments: 10.00 Total: 206.00							
Provider: DROBB							
04/07/2018	04/07/2018	Abbott, James S	D1110:Prophylaxis-adult	48.00			2 CENTRAL
04/22/2018	04/22/2018	Abbott, Patricia <Family>	Check Payment - Thank You	-125.00	04/22/2009	9.60	2 CENTRAL
04/15/2018	04/15/2018	Abbott, James S	D8670:Periodic ortho visit (contract)	950.00			2 CENTRAL
04/22/2018	04/22/2018	Abbott, Patricia <Family>	Check Payment - Thank You	-125.00	04/22/2009	108.20	2 CENTRAL
04/30/2018	04/30/2018	Abbott, Patricia <Family>	-Professional Discount	-25.00	04/30/2009	25.00	2 CENTRAL
04/15/2018	04/15/2018	Abbott, James S	90620:Exam and consultation	500.00			2 CENTRAL
05/01/2018	05/01/2018	Abbott, Patricia <Family>	Cash Payment - Thank You	-20.00	05/01/2009	20.00	2 CENTRAL
DROBB- Insurance: 0.00 Non-Insurance: 137.80 Credit Adjustments: 25.00 Total: 162.80							
Grand Totals- Insurance: 71.00 Non-Insurance: 300.80 Credit Adjustments: 35.00 Total: 406.80							

How do I run the Provider Revenue - Charges Report?

From the DXOne Reporting module, select **Ledger**, and then double-click **Provider Revenue**. For additional details about running this report, see the "Provider Revenue Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

For each provider, each charge is listed with the payments and/or credit adjustments allocated to that charge.

- A. Charges** – For each charge, the following details appear: entry date, procedure date, patient name, procedure description, amount, billing type, and clinic (where service was rendered).
- B. Allocations** – For each payment or credit, the following details appear: entry date, procedure date, patient name, payment/credit adjustment description, amount, date the amount was allocated to the charge, amount allocated to the charge, billing type, and collecting/rendering clinic.

***Note:** It is essential that you understand the difference between Entry Dates and Procedure Dates. For details on these dates, see the "Tips for Understanding Dentrix Enterprise Reports" section in the Introduction of this book.*

- C. Provider Totals** – The insurance and non-insurance payments, credit adjustments, and total revenue (the sum of the payments and credits) for the provider.
- D. Grand Totals** – The totals for all providers on the report.

Provider Revenue - Credits Report

The Provider Revenue Detail for Credits Report lists payments and credits allocated to charges that have been posted for each provider.

\$	Why: To have a record of revenue generated by each provider, to view the payments and adjustments that are being applied to charges, and to ensure correct allocation of payments and credits to procedures that have been performed
	When: Daily

Provider Revenue Detail for Credits

Date Range: 01/23/2018 - 04/23/2018
 Include Allocations: <ALL>
 Guarantor Range: <ALL> - <ALL>
 Clinics: <ALL>(Collecting)
 Providers: <ALL>
 Billing Type: <ALL>
 Adjustment Type(s): <ALL>
 Payment Type(s): <ALL>

Report Date: 04/23/2018

Report Generated By: enterprise

Page 1 of 1

Entry Date	Proc Date	Patient Name	Description	Amount	Alloc Date	Alloc Amt	BT	Clinic
------------	-----------	--------------	-------------	--------	------------	-----------	----	--------

Provider: DDS1

04/22/2018	04/22/2018	Larson, Bill <Family>	Check Payment - Thank You	-23.00		23.00	1	CENTRAL
04/22/2018	04/22/2018	Larson, Bill	D2150:Amalgam-2 surf. prim/perm	156.00	04/22/2018	23.00	1	CENTRAL
04/22/2018	04/22/2018	Larson, Bill <Family>	-Professional Discount	-10.00		10.00	1	CENTRAL
04/22/2018	04/22/2018	Larson, Bill	D2150:Amalgam-2 surf. prim/perm	156.00	04/22/2018	10.00	1	CENTRAL

DDS1- Insurance: 0.00 Non-Insurance: 23.00 Credit Adjustments: 10.00 Total: 33.00

Provider: DROBB

04/22/2018	04/22/2018	Abbott, Patricia <Family>	Check Payment - Thank You	-125.00		117.80	2	CENTRAL
01/27/2018	01/27/2018	Abbott, James S	D1110:Prophylaxis-adult	48.00	04/22/2018	9.60	2	CENTRAL
02/15/2018	02/15/2018	Abbott, James S	D8670:Periodic ortho visit (contract)	950.00	04/22/2018	108.20	2	CENTRAL

DROBB- Insurance: 0.00 Non-Insurance: 117.80 Credit Adjustments: 0.00 Total: 117.80

Grand Totals- Insurance: 0.00 Non-Insurance: 140.80 Credit Adjustments: 10.00 Total: 150.80

- A
- B
- C
- D

How do I run the Provider Revenue - Credits Report?

From the DXOne Reporting module, select **Ledger**, and then double-click **Provider Revenue**. For additional details about running this report, see the "Provider Revenue Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

For each provider, each payment and/or credit adjustment is listed with the charge to which it was allocated:

A. Allocations – For each payment or credit, the following details appear: entry date, procedure date, patient name, payment/credit adjustment description, amount, amount allocated, billing type, and collecting/rendering clinic.

B. Charges – For each charge, the following details appear: entry date, procedure date, patient name, procedure description, amount, date an amount was allocated to the charge, amount allocated to the charge, billing type, and clinic (where service was rendered).

Note: It is essential that you understand the difference between Entry Dates and Procedure Dates. For details on these dates, see the "Tips for Understanding Dentrix Enterprise Reports" section in the Introduction of this book.

C. Provider Totals – The insurance and non-insurance payments, credit adjustments, and total revenue (the sum of the payments and credits) for the provider.

D. Grand Totals – The totals for all providers on the report.

Provider Revenue - Summary Report

The Provider Revenue Detail Summary Report lists payments and credits allocated to charges that have been posted for each provider.

\$	<p>Why: To have a record of revenue generated by each provider, to view the payments and adjustments that are being applied to charges, and to ensure correct allocation of payments and credits to procedures that have been performed</p> <p>When: Daily</p>
-----------	--

Provider Revenue Detail Summary				
Date Range: 12/1/2017 - 12/23/2017 Include Allocations: <ALL> Guarantor Range: <ALL> - <ALL> Clinics: <ALL>(Collecting) Providers: <ALL> Billing Type: <ALL> Adjustment Type(s): <ALL> Payment Type(s): <ALL>				
Report Date: 12/23/2017		Report Generated By: ENTERPRISE		Page 1 of 1
Provider	Insurance	Non-Insurance	Cr Adjustments	Total Revenue
AMCCLURE	145.00	50.00	22.00	217.00
DDS1	100.00	243.96	35.00	378.96
DDS-1	260.00	108.00	0.00	368.00
DDS2	0.00	100.00	0.00	100.00
DDS-2	105.00	0.00	0.00	105.00
DROBB	511.90	345.00	321.20	1,178.10
Grand Totals	1,121.90	846.96	378.20	2,347.06

A

B

How do I run the Provider Revenue - Summary Report?


From the DXOne Reporting module, select **Ledger**, and then double-click **Provider Revenue**. For additional details about running this report, see the "Provider Revenue Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Provider Totals** – The provider is listed with the corresponding insurance and non-insurance payments, credit adjustments, and total revenue, which is the sum of the payments and credits.
- B. Grand Totals** – The totals for all providers on the report.

Referral Analysis Report

The Referral Analysis report displays the number of referrals from each referral source. The report also displays the amount of production generated as a result of the referrals.

	<p>Why: To compare referral sources and to view the total number of referrals over a specified date range</p> <p>When: As needed</p>
---	--

Referral Analysis					
First Visit Date Range: 12/01/2017 - 12/17/2017 Treatment Date Range: 12/01/2017 - 12/17/2017 - Entry Date Clinic(s): <ALL> Provider(s): <ALL> Sort by: Referral Name					
Date: 12/31/2017		Report Generated By: enterprise		Page 1 of 1	
Patient Referred By	Number of Patients	Total Production	Average Per Patient	Percent of Number of Patients	Percent of Production
Dr. Evans, Jeff	10	\$1,433.00	\$143.30	34.48%	54.74%
Dr. Tyler, Mark	5	\$950.00	\$190.00	17.24%	36.29%
Family	2	\$105.00	\$52.50	6.90%	4.01%
Phone Survey	1	\$0.00	\$0.00	3.45%	0.00%
Yellow Page Ad	11	\$130.00	\$11.82	37.93%	4.97%
Total	29	\$2,618.00	\$397.62	100.00 %	100.00 %
Clinic Name	Number of Patients	Total Production	Average per patient		
CENTRAL	3	\$225.00	\$75.00		
Total Production	3	\$225.00	\$75.00		

A

B

C

D

How do I run the Referral Analysis Report?

From the DXOne Reporting module, select **Analysis**, and then double-click **Referral Analysis**. For additional details about running this report, see the "Referral Analysis Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

This report can be sorted by the name of the referral source, number of patients referred, and production as a result of the referral. The report contains the following information:

A. Referral Sources

- **Patient Referred By** – The name of the person or entity that referred the patient.
- **Number of Patients** – The number of referrals from the referral source.
- **Total Production** – The total amount of production resulting from the referral source.
- **Average Per Patient** – The average production resulting from the referral source (Total Production/Number of Patients).
- **Percent of Number of Patients** – The percent of the referred patients on the report that come from the referral source listed (the total number of patients divided by the number of patients for the given referral source).
- **Percent of Production** – The production total divided by the combined production total.

B. Total – The totals for all referral sources.

C. Clinic Totals – The number of patients, total production, and average production per patient for each clinic.

D. Total Production – The total number of patients, total production, and average production per patient for all clinics on the report.

Referral Recap Report

The Referral Recap report lists the work completed and/or treatment planned for patients referred to your practice.

Why: To inform the referring doctor of the work completed/planned as a result of the referral

When: Monthly or weekly

REFERRAL RECAP

Dennis Smith,
1234 South Pine St
Mesa, AZ 85210
(480)555-6525

A

PATIENT INFORMATION

James S Abbott
123 S Oak Rd
Murray, UT 84123
555-1586

C

REFERRAL INFORMATION

Dr. Evans, Jeff
1234 N Maple
Provo, UT 84601
555-5622

B

Date: 04/23/2018

COMPLETED TREATMENT

COMPLETED DATE	TOOTH	SURFACE	CODE	DESCRIPTION
04/15/2018	17		D7230	Extraction-impacted/part bony
04/15/2018	16		D7140	Extract,erupted th/exposed rt
04/15/2018	32		D7140	Extract,erupted th/exposed rt
04/22/2018			D0274	Bitewings-four films

D

TREATMENT STILL IN PROGRESS

REFERRED DATE	TOOTH	SURFACE	CODE	DESCRIPTION
04/23/2018	UR		D4341	Perio scale&root pin-4+per quad

E

Additional Notes:
Additional notes appear here.

F

How do I run the Referral Recap Report?

- In the Office Manager, from the **Reports** menu, point to **Ledger**, and then click **Referral Recap**.
- In the Patient Chart, from the **File** menu, click **Print Referral**.
- In the Ledger, from the **Print** menu, click **Referral Recap**.

For additional details about running this report, see the “Referral Recap Report,” “Printing the Referral Recap Report,” and “Walkout statements” topics in the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Provider** – The provider associated with the referral.
- B. Referring Doctor** – The referring doctor.
- C. Patient** – The referred patient.
- D. Completed Procedures** – All procedures completed as a result of the referral.
- E. Treatment Plans** – All procedures treatment planned as a result of the referral.
- F. Additional Notes** – Additional notes entered in the **Referral Recap Report** dialog box.

The screenshot shows the "Referral Recap Report" dialog box. It is organized into several sections for data selection:

- Select Referral Source:** Includes "From" and "To" dropdown menus, both currently set to "<ALL>".
- Select Patient:** Includes "From" and "To" dropdown menus, both currently set to "<ALL>".
- Completed Work Date Range:** Includes "From" and "To" date fields, both set to "05/16/2013".
- Procedure Code Range:** Includes "From" and "To" dropdown menus, both currently set to "<ALL>".
- Select Provider:** Includes "From" and "To" dropdown menus, both currently set to "<ALL>".
- Select Billing Type:** Includes "From" and "To" dropdown menus, both currently set to "<ALL>".
- Additional Notes:** A large text area containing a circled "F".

At the bottom of the dialog are "OK" and "Cancel" buttons.

Referral Slip

The Referral Slip allows you to provide patient referral information to other doctors.



Why: To provide specialists with referral information

When: After entering a referral in Dentrix Enterprise and before a patient leaves your office after being referred to a specialist

PATIENT REFERRAL SLIP

Dennis Smith,
1234 South Pine
Mesa, AZ 85210
(480)555-6525

PATIENT INFORMATION

James S Abbott
123 S Oak St
Murray, UT 84123
555-1586

REFERRAL INFORMATION

Charles M. Clark, M.D.
1234 N Medical Way
Mesa, AZ 85210
(212)555-5511

TP DATE	TOOTH	SURFACE	CODE	DESCRIPTION
05/13/2018	18		D7270	Reimplantation/stabilization

Additional Notes:

How do I run the Referral Slip?



In the Patient Chart, from the **File** menu, point to **Print Referral**, and then click **Referral Slip**. For additional details about running this report, see the "Printing a referral slip" topic in the Patient Chart portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Procedures** – The procedures that have been completed within the specified date range are listed.
- B. Custom Note** – The note that was entered in the **Additional Notes** field when setting up the options to run this report.

Referred By Doctor/Other Report

The Referred By Doctor/Other report displays patients that have been referred to your practice by other doctors or non-person sources (such as, advertisements). This report also lists the production totals resulting from each referral.

	Why: To identify effective referral sources, to track revenue generated as a result of a referral source, and to maintain professional relations
	When: As needed

REFERRED BY DOCTOR/OTHER REPORT				
The Dentist Group				
Referral Date: 01/16/2018 - 04/23/2018				
Date: 04/23/2018			Page: 1	
DOCTOR/OTHER'S NAME	PHONE	TREATMENT PLAN	PRODUCTION	BALANCE
REFERRED PATIENT NAME	REFERRAL DATE			
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">A</div> <div> <p>Dr. Evans, Jeff 1234 N Cherry Ln Provo, UT 84601</p> </div> </div>	555-5622		<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">B</div> <div> <p>Total Referrals: 13 Listed Referrals: 4 Last Gratuity Date: 04/23/2018 Gratuity Given: money</p> </div> </div>	
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">C</div> <div> <p>James S Abbott James S Abbott James S Abbott James S Abbott</p> </div> </div>	01/25/2018 01/26/2018 01/27/2018 04/23/2018		5366.00 5366.00 5366.00 5366.00	0.00 0.00 0.00 0.00
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">C</div> <div> <p>Dr. Tyler, Mark 1235 N. Cherry Ln Provo, UT 84601</p> </div> </div>	555-5962		<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">B</div> <div> <p>Total Referrals: 5 Listed Referrals: 1 Last Gratuity Date: Gratuity Given:</p> </div> </div>	6573.84 6573.84 6573.84 6573.84
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">C</div> <div> <p>Patricia Abbott</p> </div> </div>	01/25/2018		5235.00	0.00
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">C</div> <div> <p>Family</p> </div> </div>			<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">B</div> <div> <p>Total Referrals: 2 Listed Referrals: 1 Last Gratuity Date: Gratuity Given:</p> </div> </div>	6573.84
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">C</div> <div> <p>Brian R Little</p> </div> </div>	01/18/2018		765.00	0.00
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">C</div> <div> <p>Yellow Page Ad</p> </div> </div>			<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">B</div> <div> <p>Total Referrals: 12 Listed Referrals: 3 Last Gratuity Date: Gratuity Given:</p> </div> </div>	200.00
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">C</div> <div> <p>Kevin, Little Mark Taylor Kerri Taylor</p> </div> </div>	04/23/2018 01/17/2018 01/25/2018		0.00 484.00 484.00	194.00 130.00 130.00
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">D</div> <div> <p>TOTAL REFERRALS: 32 TOTAL LISTED REFERRALS: 9</p> </div> </div>				

How do I run the Referred By Doctor/Other Report?

From the DXOne Reporting module, select **Management**, and then double-click **Referred By Doctor/Other**. For additional details about running this report, see the “Referred By Doctor/Other Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Doctor Information – The name, mailing address, and phone number of the referring doctor.

B. Referral Details – In addition to the date and description of the last gratuity given to the referral source, the following information appears on this report:

- **Total Referrals** – The total number of patients referred by the referral source. Be aware that report filters have no affect on this number; this number represents the total number of patients ever referred by the referral source.
- **Listed Referrals** – The total number of referrals displayed on the report for the referring doctor.

*Note: This number only appears if you select **Include All Referral Sources** when setting options for this report.*

C. Referred Patients – If you select **Include Referred Patients** when setting options for this report, referred patients appear on the report. In addition to the name and referral date, the following information is listed for each referral displayed on the report:

- **Treatment Plan** – The total value of treatment plans for the patient.
- **Production** – The total value of completed procedures.

*Note: If all production values are zero, clear **Include Patients With No Production or Treatment Planned Procedures** when setting options for this report.*

- **Balance** – The patient’s current balance.



D. Report Totals

- **Total Referrals** – The total number of patients referred by the referral sources.
- **Listed Referrals** – The total number of referrals listed in this report.

*Note: This number only appears if you select **Include All Referral Sources** when setting options for this report.*

Referred By Patient Report

The Referred By Patient Report lists the patients that have been referred to your practice by other patients. This report also lists the production totals resulting from each referral.

	Why: To track revenue resulting from patient referrals
	When: As needed

REFERRED BY PATIENT REPORT					
The Dentist Group					
Referral Date: 03/08/2018 - 03/08/2018			Production Date: 03/08/2018 - 03/08/2018		
Date: 03/08/2018		Page:			
PATIENT'S NAME	REFERRED PATIENT NAME	PHONE	REFERRAL DATE	TREATMENT PLAN	PRODUCTION
					BALANCE
<div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin-bottom: 5px;">A</div>	Crosby, Brent T. (Patient) 123 Golden Pine Rd Kailua, TN 77308 Male	(743)555-2381			
	<div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin-bottom: 5px;">B</div> Total Referrals: 1 Listed Referrals: 1 Last Gratuity Date: 02/23/2018 Gratuity Given: 2 movie tickets				
	<div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin-bottom: 5px;">C</div> Shirley Crosby		03/08/2018	0.00	0.00
	Larson, Amy (Patient) 123 W. Oak St Mesa, AZ 85210 Male				
	Amy Larson		03/08/2018	220.00	292.00
	Perkins, Peggy M (Patient) 12345 Oakwood East Pointe, IN 40021 Female	(343)555-2507			
	Shelly Perkins		03/08/2018	1303.00	69.00
	Reeves, Elisabeth (Patient) 12345 W. Country Ln Shire Hill, MI 47032 Female	(146)555-3896			
	Joshua Reeves		03/08/2018	0.00	300.00
<div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin-bottom: 5px;">D</div> TOTAL REFERRALS:					6
TOTAL LISTED REFERRALS:					4

How do I run the Referred By Patient Report?


From the DXOne Reporting module, select **Management**, and then double-click **Referred By Patient**. For additional details about running this report, see the "Referred By Patient Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Referring Patient Information** – The name, mailing address, phone number, and gender of patients that have provided referrals to your practice.
- B. Referral Details** – In addition to the date and description of the last gratuity given to the referring patient, the following information appears on this report:
- **Total Referrals** – The total number of patients referred by the patient. Be aware that report filters have no affect on this number; this number represents the total number of patients ever referred by the patient.
 - **Listed Referrals** – The total number of referrals displayed on the report for the referring patient.
- C. Referred Patients** – In addition to the name and referral date, the following information is listed for each referral displayed on the report:
- **Treatment Plan** – The total value of treatment plans for the referral.
 - **Production** – The total value of completed procedures.
 - **Balance** – The referral's current balance.
- D. Report Totals**
- **Total Referrals** – The total number of referrals provided by the referring patients.
 - **Listed Referrals** – The total number of referrals listed in this report.

Referred To Doctor Report

The Referred To Doctor Report lists the number of patients your practice has referred to another practice. Depending on report settings, this report also lists the name and referral date of each referral.

	<p>Why: To maintain professional relations</p> <p>When: As needed</p>
---	---

Server Name: <Default>

REFERRED TO DOCTOR REPORT

Clinics: <ALL>
 Providers: <ALL>
 ADA Codes: <ALL>
 Referral Date: All Referral Sources

Report Date: 9/18/2019 Report Generated By: ENTERPRISE Page 1 of 1

DOCTOR'S NAME		PHONE					
Referred Patient Name	Referral Date	Scheduled Date	Completed Date	Referral Status	Days Referred		
Baker, Bruce (Periodontics)		(800) 555-6660					Total Referrals: 1
1234 Palma Rd							Listed Referrals: 1
#201							
Anytown, US 11111							
Brent Crosby	09/17/2019					1	
Charles M. Clark, M.D. (Surgery, Oral & Maxillofacial)		(212) 555-5511					Total Referrals: 12
1750 N Medical Way							Listed Referrals: 5
Mesa, AZ 85210							
Mary Brown	05/05/2016					999+	
Joshua Reeves	06/15/2016					999+	
Patricia Abbott	11/22/2016					999+	
Tom N Crosby	10/09/2016					999+	
Brent Crosby	06/17/2017	06/30/2017	06/30/2017	Complete		13	
Dr. Clark, Robert (Endodontist)		() 555-6423 Ext: 205					Total Referrals: 1
1750 University Ave.							Listed Referrals: 1
Suite 200							
Anytown, PA 99999							
Shirley Crosby	06/21/2005					999+	
D					TOTAL REFERRALS:	14	
					TOTAL LISTED REFERRALS:	7	

How do I run the Referred To Doctor Report?

From the DXOne Reporting module, select **Management**, and then double-click **Referred To Doctor**. For additional details about running this report, see the “Referred To Doctor Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Doctor Information – The name, mailing address, and phone number of a doctor to which the practice provided referrals.

B. Doctor Totals

- **Total Referrals** – The total number of patients referred to the doctor. Be aware that report filters have no affect on this number; this number represents the total number of patients ever referred to the doctor.
- **Listed Referrals** – The total number of referrals listed for the doctor.

*Note: This number only appears if you select **Include Referred Patients** when setting options for this report.*

C. Referred Patients – If you select **Include Referred Patients** when running this report, the following details regarding each outbound referral appear on the report:

- Patient name
- Referred, scheduled, and completed dates
- Status
- Number of days referred out


D. Report Totals

- **Total Referrals** – The total number of referred patients.
- **Listed Referrals** – The total number of referred patients listed in this report.

*Note: Listed Referrals only appears if you select **Include Referred Patients** when setting options for this report.*

Registration Information Report

The Registration Information Report displays the practice's registration information and Dentrix Enterprise serial number.

	<p>Why: To quickly access your registration information and serial number</p> <p>When: As needed</p>
---	--

REGISTRATION INFORMATION		
The Dentist Group		Page: 1
Date: 04/22/2018		
A	<p>PRACTICE TITLE: [The Dentist Group] STREET1: [123 East Valley Drive] STREET2: [] CITY: [American Fork] STATE: [UT] ZIP: [84003] PHONE: [(801)555-9300] FISCAL MONTH: [January] COUNTRY: [] SERIAL #: [<EVALUATION COPY>]</p>	
B		

How do I run the Registration Information Report?



In the Office Manager, from the **Reports** menu, point to **Reference**, and then click **Registration Information**. For additional details about running this report, see the "Registration Information Report" topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Practice Information** – The practice information associated with your serial number.
- B. Serial Number** – The Dentrix Enterprise product serial number.

RVU Day Sheet Report

The RVU Day Sheet report lists RVU production for procedures that have been posted to the Ledger.

	Why: To print a record of transactions each day, to review RVU production totals for a date or date range
	When: Daily

Production RVU Day Sheet									
Date Range: 04/24/2018 - 04/24/2018 Procedure Date									
Clinics: <ALL>									
Providers: <ALL>									
Billing Type: <ALL>									
Report Date: 05/01/2018			Report Generated By: enterprise				Page 1 of 1		
Entry Date	Proc Date	Patient Name	Chart #	TH Code	Description	RVU	Lab Exp.	Net RVU	BT
04/24/2018	04/24/2018	Smith, Brandon	SM0010	D1110	Prophylaxis-adult	25.00	0.00	25.00	1
04/24/2018	04/24/2018	Smith, Brandon	SM0010	D0120	Periodic oral evaluation	25.00	45.00	-20.00	1
04/24/2018	04/24/2018	Smith, Brandon	SM0010	D0274	Bitewings-four films	374.00	0.00	374.00	1
Total Summary						424.00	45.00	379.00	

DDS1 (Dennis Smith)									
CENTRAL									
04/24/2018	04/24/2018	Baber, Tom		64550	Transcutan. electric. stimul.	2,345.00	0.00	2,345.00	1
04/24/2018	04/24/2018	Abbott, Patricia	ABB102	16 D2391	Resin composite-1s, posterior	0.00	0.00	0.00	4
04/24/2018	04/24/2018	Abbott, Patricia	ABB102	17 D2391	Resin composite-1s, posterior	90.00	0.00	90.00	4
04/24/2018	04/24/2018	Raab, Kenneth D		14 D2150	Amalgam-2 surf. prim/perm	125.00	0.00	125.00	1
04/24/2018	04/24/2018	Raab, Kenneth D		3 D2750	Crown-porc fuse high noble mtl	900.00	450.00	450.00	1
CENTRAL Summary:						3,460.00	450.00	3,010.00	
DDS1 (Dennis Smith) Summary:						3,460.00	450.00	3,010.00	
Unique Patient Count for DDS1 (Dennis Smith): 3									
Unique Visit Count for DDS1 (Dennis Smith): 3									

CENTRAL									
DDS1 (Dennis Smith)									
04/24/2018	04/24/2018	Baber, Tom		64550	Transcutan. electric. stimul.	2,345.00	0.00	2,345.00	1
04/24/2018	04/24/2018	Abbott, Patricia	ABB102	16 D2391	Resin composite-1s, posterior	0.00	0.00	0.00	4
04/24/2018	04/24/2018	Abbott, Patricia	ABB102	17 D2391	Resin composite-1s, posterior	90.00	0.00	90.00	4
04/24/2018	04/24/2018	Raab, Kenneth D		14 D2150	Amalgam-2 surf. prim/perm	125.00	0.00	125.00	1
04/24/2018	04/24/2018	Raab, Kenneth D		3 D2750	Crown-porc fuse high noble mtl	900.00	450.00	450.00	1
DDS1 (Dennis Smith) Summary:						3,460.00	450.00	3,010.00	
Unique Patient Count for DDS1 (Dennis Smith): 3									
Unique Visit Count for DDS1 (Dennis Smith): 3									
CENTRAL Summary:						3,460.00	450.00	3,010.00	

How do I run the RVU Day Sheet Report?

From the DXOne Reporting module, select **Management**, and then double-click **RVU Day Sheet**. For additional details about running this report, see the “RVU day sheet” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report can be grouped and subtotaled by provider with a breakdown by clinic. Or, the report can be grouped and subtotaled by clinic with a breakdown by provider. The following information can be used to monitor RVU production for each provider and/or clinic:

A. Procedures – The procedures posted to the Ledger are listed if **Include Procedures** is selected when setting up the options to run this report. Each procedure provides the following information:

- **Entry Date** – The date a procedure is posted to the Chart (and to the Ledger simultaneously).
- **Procedure Date** – The date a procedure is done in the Chart.
Note: It is essential that you understand the difference between Entry Dates and Procedure Dates. For details on these dates, see the “Tips for Understanding Dentrix Enterprise Reports” section in the Introduction of this book.
- **Patient Name** – The name and chart number of the patient on whom the procedure was performed.
- **TH** – The tooth number(s) associated with a procedure.
- **Code and Description** – The ADA code and description of the procedure.
- **RVU** – The Relative Value Units that were assigned to the procedure from the **Procedure Code Editor** dialog box.
- **Lab Expenses** – The lab expenses that were assigned to the procedure from the **Procedure Code Editor** dialog box. This column appears if **Subtract Lab Expenses** is selected when setting up the options to run this report.
- **Net RVU** – The net RVU is calculated by subtracting lab expenses (if the **Subtract Lab Expenses** option was selected) from the RVU.
- **BT** – The billing type of the patient on whom the procedure was performed.



B. Total Summary – The total RVU, lab expenses, and net RVU.

C. Provider Totals – The RVU production is shown for the provider with a breakdown of the procedures for each clinic the provider works in. Each clinic’s RVU production is subtotaled. After the clinic subtotals, a totals summary for the provider appears. Also, for the provider, a unique patient count and unique visit count are given.

D. Clinic Totals – The RVU production is shown for the clinic with a breakdown of the procedures performed by each provider at that clinic. Each provider’s RVU production is subtotaled. After the provider subtotals, a totals summary for the clinic appears. Also, for the provider, a unique patient count and unique visit count are given.

RVU Production Summary Report

The RVU Production Summary Report lists RVU production for procedures that have been posted to the Ledger.

	Why: To print a record of transactions each day, to review RVU production totals for a date or date range
	When: Daily

RVU Production Summary							
04/24/2018 - 04/24/2018 Procedure Date							
Clinics: <ALL>							
Provider: <ALL>							
Billing Types: <ALL>							
Report Date: 05/01/2018		Report Generated By: enterprise				Page 1 of 1	
Procedure Date	Entry Date	Patient Name	BT	Description	Amount		
		Quantity	Total	Average	Percent	Lab Exp.	Net RVU
04/24/2018	04/24/2018	Smith, Brandon	1	D0120 - Periodic oral evaluation	25.00		
04/24/2018	04/24/2018	Smith, Brandon	1	D1110 - Prophylaxis-adult	25.00		
04/24/2018	04/24/2018	Smith, Brandon	1	D0274 - Bitewings-four films	374.00		
GRAND TOTALS:							
Medicaid		0	0.00	0.00	0.00%	0.00	0.00
Non-Medicaid		3	424.00	141.33	100.00%	45.00	379.00
Total		3	424.00	141.33	100.00%	45.00	379.00

A

B

C

DDS1							
CENTRAL							
04/24/2018	04/24/2018	Larson, Bill	1	D7120 - Extraction-each additional			171.00
CENTRAL							
Medicaid			0	0.00	0.00	0.00%	0.00
Non-Medicaid			1	171.00	171.00	100.00%	171.00
Total			1	171.00	171.00	100.00%	171.00

DDS1							
Medicaid			0	0.00	0.00	0.00%	0.00
Non-Medicaid			1	171.00	171.00	100.00%	171.00
Total			1	171.00	171.00	50.00%	171.00

D

CENTRAL							
DDS01							
04/24/2018	04/24/2018	Smith, Brandon	1	D0120 - Periodic oral evaluation			25.00
04/24/2018	04/24/2018	Smith, Brandon	1	D1110 - Prophylaxis-adult			125.00
04/24/2018	04/24/2018	Smith, Brandon	1	D0274 - Bitewings-four films			374.00
DDS01							
Medicaid			0	0.00	0.00	0.00%	0.00
Non-Medicaid			3	424.00	141.33	100.00%	379.00
Total			3	424.00	141.33	100.00%	379.00

CENTRAL							
Medicaid			0	0.00	0.00	0.00%	0.00
Non-Medicaid			3	424.00	141.33	100.00%	379.00
Total			3	424.00	141.33	100.00%	379.00

How do I run the RVU Production Summary Report?

From the DXOne Reporting module, select **Management**, and then double-click **RVU Production Summary**. For additional details about running this report, see the "RVU Production Summary Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report can be grouped and subtotaled by provider with a breakdown by clinic. Or, the report can be grouped and subtotaled by clinic with a breakdown by provider. The following information can be used to monitor RVU production for each provider and/or clinic:

A. Procedures – The procedures posted to the Ledger are listed if **Include Patient Detail** is selected when setting up the options to run this report. Each procedure provides the following information:

- **Procedure Date** – The date a procedure is posted to the Chart.
- **Entry Date** – The date a procedure is posted to the Ledger.

Note: It is essential that you understand the difference between Entry Dates and Procedure Dates. For details on these dates, see the "Tips for Understanding Dentrix Enterprise Reports" section in the Introduction of this book.

- **Patient Name** – The name of the patient on whom the procedure was performed.
- **Code and Description** – The ADA code and description of the procedure.
- **Amount** – The Relative Value Units (RVU) that were assigned to the procedure from the **Procedure Code Editor** dialog box.

B. Grand Totals



- **Medicaid Totals** – If **Separate Totals for Medicaid** and **Non-Medicaid Patients** are selected when setting up options to run this report, the Grand Totals section will divide up the Totals to reflect production from patients with Medicaid and those without Medicaid.
- **Totals** – The Grand Totals section displays the Totals for the quantity of procedures, total amount of the procedures, average charge per procedure, percent of RVU, lab expenses assigned to the procedure from the **Procedure Code Editor** dialog box, and net RVU of the procedures, which is calculated by subtracting lab expenses (if the **Subtract Lab Expenses option** was selected) from the RVU.

C. Provider Totals – The RVU production is shown for the provider with a breakdown of the procedures for each clinic the provider works in. Each clinic's RVU production is subtotaled. After the clinic subtotals, a totals summary for the provider appears.

D. Clinic Totals – The RVU production is shown for the clinic with a breakdown of the procedures performed by each provider at that clinic. Each provider's RVU production is subtotaled. After the provider subtotals, a totals summary for the clinic appears.

RVU Schedules Report

The RVU Schedules report lists procedure RVUs for selected RVU schedules. This report also lists the lab expenses and material expenses associated with each procedure.

	Why: To ensure each RVU schedule is set up properly, to compare multiple RVU schedules side by side, and to ensure lab expenses and material expenses are up to date
	When: After Dentrix Enterprise setup, and as needed

RVU SCHEDULE								
277, D0290, D0310, D0320, D0321, D0322, D0350, D0360, D0362, D0363, D0415, D0416, D0417, D0418, D0421, D0425, D0431, D0460, D0472, D0473, D047								
Report Date: 04/22/2018			Report Generated By: enterprise			Page 1 of 2		
CODE	DESCRIPTION	RVU 1	RVU 2	RVU 3	RVU 4	RVU 5	LAB EXPENSE	MATERIAL
D0001	Oral Cancer Screening	15.00	16.00	0.00	0.00	0.00	9.00	15.00
D0120	Periodic oral evaluation	25.00	27.00	0.00	0.00	0.00	45.00	78.00
D0140	Limited oral evaluation	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0145	Oral evaluation < 3 yrs of age	5.00	5.00	0.00	0.00	0.00	0.00	0.00
D0150	Comp oral eval-new/estab pat	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0160	Detail/extensive oral eval, B/R	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0170	Limited re-evaluation estab pat	565.00	614.00	0.00	0.00	0.00	0.00	0.00
D0180	Comprehensive perio evaluation	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0210	Intraoral-complete series (bw)	9.00	10.00	0.00	0.00	0.00	0.00	23.00
D0220	Intraoral-periapical-1st film	6.00	7.00	0.00	0.00	0.00	0.00	24.00
D0230	Intraoral-periapical-each add'l	36.00	39.00	0.00	0.00	0.00	0.00	12.00
D0240	Intraoral-occlusal film	35.00	38.00	0.00	0.00	0.00	0.00	23.00
D0250	Extraoral-first film	6.00	7.00	0.00	0.00	0.00	0.00	25.00
D0260	Extraoral-each additional film	5.00	5.00	0.00	0.00	0.00	0.00	14.00
D0270	Bitewing-single film	321.00	349.00	0.00	0.00	0.00	0.00	24.00
D0272	Bitewings-two films	61.00	66.00	0.00	0.00	0.00	0.00	24.00
D0273	Bitewings-three films	98.00	107.00	0.00	0.00	0.00	0.00	25.00
D0274	Bitewings-four films	374.00	406.00	0.00	0.00	0.00	0.00	47.00
D0277	Vertical bitewings-7 to 8 films	67.00	73.00	0.00	0.00	0.00	0.00	326.00
D0290	Skull &facial bone survey film	3,499.00	3,802.00	0.00	0.00	0.00	0.00	233.00
D0310	Saliography	316.00	343.00	0.00	0.00	0.00	0.00	0.00
D0320	TMJ arthrogram, incl injection	64.00	70.00	0.00	0.00	0.00	0.00	2,344.00
D0321	Other TMJ films, by report	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0322	Tomographic survey	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0330	Panoramic film	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0340	Cephalometric film	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0350	Oral/Facial Photographic Images	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0360	Cone beam-CT/craniofacial data	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0362	Cone beam-2D multi img reconst	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0363	Cone beam-3D multi img reconst	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0415	Collection of microorg culture	25.00	27.00	0.00	0.00	0.00	23.00	15.00
D0416	Viral Culture	25.00	27.00	0.00	0.00	0.00	14.00	3.00
D0417	Collection of saliva sample	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0418	Analysis of saliva sample	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0421	Genetic test-suscept oral dis	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0425	Caries susceptibility tests	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0431	Adjunc pre-diag test-detect muc	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0460	Pulp vitality tests	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0470	Diagnostic casts	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0471	Diagnostic photographs	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0472	Accession of tiss, gr exam/rpt	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0473	Acc of tissue, gr mic exam/rpt	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0474	Acc of tiss-gr mic ex surg mar	25.00	27.00	0.00	0.00	0.00	0.00	0.00
D0475	Decalcification Procedure	25.00	27.00	0.00	0.00	0.00	0.00	0.00



How do I run the RVU Schedules Report?

From the DXOne Reporting module, select **Reference**, and then double-click **RVU Schedule**. For additional details about running this report, see the “RVU Schedule Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The following report information is found in the **Procedure Code Editor** dialog box, which can be accessed from the Office Manager. See the “Procedure Code Setup” or “Auto RVU schedule changes” topic in the Office Manager portion of the Dentrix Enterprise Help for details on how to edit this information.

A. Code – The procedure code.

B. Fee – The RVU assigned to a procedure.



C. Lab Expense – The estimated lab expense associated with the procedure.

D. Material – The estimated materials expense for the procedure.

Code	Fee
1. Office	60.00
2. PULLEM	62.00
3. DONTIST	58.00
4. DMO	55.00
5. FEE 5	0.00
6. BSofPA	0.00
7. DELTA	0.00
8. UPto999	0.00
9.	0.00
10.	0.00
11.	0.00
12.	0.00
13.	0.00
14.	0.00
15.	0.00
16.	0.00
17.	0.00
18.	0.00

RVU Utilization Report

The RVU Utilization report lists insurance carriers and, for each carrier, the relevant RVU production and details for the procedures posted during a selected date range.

	Why: To identify insurance carriers with low coverages (this is done by comparing the charges posted to the Ledger with the practice's RVU fee schedule)
	When: Yearly, and as needed

RVU UTILIZATION REPORT - DENTAL													
Date Range: 05/01/2018 - 05/01/2018 Procedure Date RVU: 002: RVU 2 Compare RVU Schedule With: Transaction Amount Include: All Procedures Clinic(s): <ALL> Provider(s): <ALL> Billing Type(s): <ALL> ADA Code(s): <ALL> Carrier From: Aetna Life and Casualty - Aetna - 321863 Carrier To: Aetna Life and Casualty - Aetna - 321863													
Report Date: 05/01/2018				Report Generated By: enterprise				Page 1 of 1					
INSURANCE CARRIER NAME			GROUP PLAN				GROUP NUMBER		PHONE				
SUBSCRIBER	DATE	ID #	PATIENT NAME	BIRTHDATE	SS #	CODE	DESCRIPTION	TH	SURFACE	PROVIDER	CLINIC	FEE	RVU
Aetna Life and Casualty			Aetna				321863		(800) 555-6444				
Abbott, Patricia	05/01/2018	5678910	Abbott, James S	11/11/1962	000-00-0000	D5214	Mand partial-metal base w/sdis	12		DDS2	CENTRAL	702.00	701.00
Abbott, Patricia	05/01/2018	5678910	Abbott, James S	11/11/1962	000-00-0000	D7111	Extraction crml remnts-decid th	13		DDS2	CENTRAL	402.00	401.00
Perkins, Peggy	05/01/2018	000-00-0000	Perkins, Peggy	11/11/1980	000-00-0000	D5214	Mand partial-metal base w/sdis	15		DDS01	CENTRAL	702.00	701.00
Perkins, Peggy	05/01/2018	000-00-0000	Perkins, Peggy	11/11/1980	000-00-0000	D7111	Extraction crml remnts-decid th	9		DDS01	CENTRAL	402.00	401.00
Smith, Brandon	05/01/2018	000-00-0000	Smith, Michael	11/11/1973	000-00-0000	D5214	Mand partial-metal base w/sdis	12		DDS01	CENTRAL	702.00	701.00
Smith, Brandon	05/01/2018	000-00-0000	Smith, Michael	11/11/1973	000-00-0000	D7111	Extraction crml remnts-decid th	7		DDS01	CENTRAL	402.00	401.00
Aetna Life and Casualty Totals:			Fee:	CoPay:	(Fee - RVU):	Total Office Visits:			Total Patients Seen:				
			3,312.00	3,306.00	6.00	3			3				
Grand Totals:										Fee:	3,312.00	Co-Pay:	3,306.00
										(Fee - RVU):	6.00		
										Total Office Visits:	3		
										Total Patients Seen:	3		

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How do I run the RVU Utilization Report?

From the DXOne Reporting module, select **Management**, and then double-click **RVU Utilization**. For additional details about running this report, see the “RVU Utilization Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Insurance Carriers** – The report is divided by insurance carriers. The carrier’s name, group plan name and number, and phone number are shown.
- B. Procedures** – The procedures posted in the Ledger for patients with the displayed insurance carrier. For each procedure the following are shown:
- **Fee** – The RVU fee that would have been attached to a procedure had the RVU fee from the RVU schedule you selected (when setting up the report options) been used.
 - **RVU** – The RVU fee attached to the procedure posted in the Ledger.
- C. Insurance Carrier Totals** – The total fees, co-pays, (Fee - RVU), office visits, and patients seen appear for each insurance carrier. The following is an explanation of the insurance carrier’s Fee and CoPay totals:
- **Fee** – The RVU fee that would have been attached to a procedure, had the RVU fee from the RVU schedule you selected (when setting up the report options) been used.
 - **CoPay** – The RVU fee attached to the procedure posted in the Ledger.
- D. Grand Totals** – The Grand Totals section displays the following information:
- **Fee** – The total RVU fees that would have been attached to a procedure, had the RVU fee from the RVU schedule you selected (when setting up the report options) been used.
 - **Co-Pay** – The total RVU fees attached to the procedures posted in the Ledger.
 - **(Fee - RVU)** – The total RVU revenue that would have been gained or lost, had the RVU fee schedule you selected (when setting up the report options) been used when posting the procedures. A positive number indicates the practice would have gained RVU revenue. A negative number indicates the practice would have lost RVU revenue.
 - **Total Office Visits** – The total number of office visits (multiple procedures performed on a patient on the same date count as one office visit).
 - **Total Patients Seen** – The total number of patients that appear on the report.

Secondary Insurance Claims Not Created Report

The Secondary Insurance Claims Not Created Report displays primary insurance claims for which secondary insurance claims were never created. Claims are sorted according to the expiration date of the secondary insurance carrier.



Why: To ensure all possible secondary insurance claims are submitted

When: Weekly or daily

Dental Secondary Insurance Claims Not Created

Date Range: 04/01/2018 - 05/05/2018

Patient Range: <ALL> - <ALL>

Include Primary Claims not received: Yes

Carrier Range: Insurance Carriers: <ALL> - <ALL>

Clinics: <ALL>

Providers: <ALL>

Billing Types: <ALL>

Report Date: 05/05/2018

Report Generated By: enterprise

Page 1 of 1

PRM CLAIM DATE	PATIENT NAME	SECONDARY INSURANCE COMPANY	PROVIDER	CLINIC	CLM AMOUNT	EXPIRES
05/05/2018	Abbott, James S	Aetna Life and Casualty	DROBB	CENTRAL	801.00	11/01/2011
05/05/2018	Little, Brian	Metropolitan Life	DDS1	CENTRAL	450.00	08/03/2011
05/05/2018	Perkins, Peggy	Connecticut General	DDS1	CENTRAL	750.00	05/01/2011
	Smith, Michael	Principal Mutual Life Ins Co	DDS01	CENTRAL	551.00	

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TOTAL OF CLAIMS NOT CREATED:

2,552.00

How do I run the Secondary Insurance Claims Not Created Report?

From the DXOne Reporting module, select **Ledger**, and then double-click **Secondary Insurance Claims Not Created**. For additional details about running this report, see the “Secondary Insurance Claims Not Created Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Prm Claim Date** – The date of the primary insurance claim.
- B. Clm Amount** – The amount of the original claim.
- C. Expires** – The date the secondary insurance claim must be submitted to the insurance carrier. The expiration date is found in the **Insurance Coverage** dialog box. To access the **Insurance Coverage** dialog box, double-click the Insurance block in the Family File, select the secondary insurance carrier, and then click **Coverage Table**.

Insurance Coverage - (Aetna Dental/HSPS Aetna)

Deductible

	Lifetime Individual	Annual Individual	Annual Family
Standard	0	500	1500
Preventive	0	1000	3000
Other	0	1500	4500

Maximum Benefit

Individual	Family
50000	15000

Ortho Plan - Use as Ortho Lifetime Max

Claim Deadline: >> ©

Coverage Table

Beg Proc	End Proc	Category	Cov %	Ded	Co-Pay	Pre Est?
D0100	D1999	Diag/Preventive	100	St	0.00	<input type="checkbox"/>
D0100	-D1999	Diag/Preventive	100	S	0.00	N
D2000	-D2699	Basic Restor	80	S	0.00	N
D2700	-D2899	Crowns	50	S	0.00	N
D2900	-D2999	Restorative	80	S	0.00	N
D3000	-D3999	Endodontics	80	S	0.00	N
D4000	-D4999	Periodontics	80	S	0.00	N
D5000	-D5999	Prosth, remov	50	S	0.00	N

Select Category

Co-Payment Calculations for Ins Portion:

- Total Fee x Coverage %
- (Total Fee - Co-Pay) x Cov %
- (Total Fee x Cov %) - Co-Pay

Select Table: >>

Buttons: Notes, OK, Cancel

- D. Total Of Claims Not Created** – The total amount of the secondary claims that were not created.

Secondary Pre-Treatment Estimates Not Created Report

The Secondary Pre-treatment Estimates Not Created Report displays primary estimates for which secondary estimates were never created. Estimates are sorted according to the expiration date of the secondary insurance carrier.

\$	Why: To ensure all possible secondary pre-treatment estimates are submitted
	When: Weekly or daily

Dental Secondary Pre-Treatment Estimates Not Created

Date Range: 04/01/2018 - 05/05/2018
 Patient Range: <ALL> - <ALL>
 Include Primary Pre-Treatment Estimates not received: Yes
 Carrier Range: Insurance Carriers: <ALL> - <ALL>
 Clinics: <ALL>
 Providers: <ALL>
 Billing Types: <ALL>

Report Date: 05/05/2018

Report Generated By: enterprise

Page 1 of 1

PRM CLAIM DATE	PATIENT NAME	SECONDARY INSURANCE COMPANY	PROVIDER	CLINIC	CLM AMOUNT	EXPIRES
04/23/2018	Abbott, James S	Aetna Life and Casualty	DROBB	CENTRAL	654.00	10/20/2018
04/23/2018	Abbott, James S	Aetna Life and Casualty	DROBB	CENTRAL	898.00	10/20/2018
05/05/2018	Little, Brian	Metropolitan Life	DDS1	CENTRAL	1,100.00	08/03/2018
05/05/2018	Perkins, Peggy	Connecticut General	DDS1	CENTRAL	270.00	05/05/2019
	Smith, Michael	Principal Mutual Life Ins Co	DDS01	CENTRAL		



TOTAL OF CLAIMS NOT CREATED: 3,742.00

How do I run the Secondary Pre-Treatment Estimates Not Created Report?

From the DXOne Reporting module, select **Ledger**, and then double-click **Secondary Pre-Treatment Est. Not Created**. For additional details about running this report, see the “Secondary Pre-Treatment Estimates Not Created Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Prm Claim Date** – The date of the primary pre-treatment estimate.
- B. Clm Amount** – The amount of the original pre-treatment estimate.
- C. Expires** – The date the secondary insurance claim must be submitted to the insurance carrier. The expiration date is found in the **Insurance Coverage** dialog box. To access this dialog box, double-click the Insurance block in the Family File, select the secondary insurance carrier, and then click **Coverage Table**.
- D. Total Of Claims Not Created** – The total amount of the secondary pre-treatment estimates that were not created.

Insurance Coverage - (Aetna Dental/HSPS Aetna)

Deductible

	Lifetime Individual	Annual Individual	Annual Family
Standard	0	500	1500
Preventive	0	1000	3000
Other	0	1500	4500

Maximum Benefit

Individual	Family
50000	15000

Ortho Plan - Use as Ortho Lifetime Max

Claim Deadline: >> ©

Coverage Table

Beg Proc	End Proc	Category	Cov %	Ded	Co-Pay	Pre Est?
D0100	D1999	Diag/Preventive	100	St	0.00	<input type="checkbox"/>
D0100	-D1999	Diag/Preventive	100	S	0.00	N
D2000	-D2699	Basic Restor	80	S	0.00	N
D2700	-D2899	Crowns	50	S	0.00	N
D2900	-D2999	Restorative	80	S	0.00	N
D3000	-D3999	Endodontics	80	S	0.00	N
D4000	-D4999	Periodontics	80	S	0.00	N
D5000	-D5999	Prosth, remov	50	S	0.00	N

Select Category

Co-Payment Calculations for Ins Portion:

- Total Fee x Coverage %
- (Total Fee - Co-Pay) x Cov %
- (Total Fee x Cov %) - Co-Pay

Select Table: >>

Buttons: Notes, OK, Cancel

Standard Coverage Tables Report

The Standard Coverage Table Report allows you to view and print standard coverage tables.

Note: If you want coverage information for a specific insurance carrier, see the "Insurance Coverage Tables Report" on page 120.

\$	<p>Why: To ensure standard coverage tables are set up properly</p> <p>When: As needed</p>
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STANDARD COVERAGE TABLES							
The Dentist Group							
Tables 1 - 5							
Date: 04/22/2018				Page: 1			
Coverage Table 1: Default Coverage Table							
BEGIN PROC	END PROC	CATEGORY	COV %	DEDUCTIBLE	CO PAY	PRE AUTH?	
D0100	D1999	Diag/Preventive	100	Standard	0.00	N	
D2000	D2699	Basic Restor	80	Standard	0.00	N	
D2700	D2899	Crowns	50	Standard	0.00	N	
D2900	D2999	Restorative	80	Standard	0.00	N	
D3000	D3999	Endodontics	80	Standard	0.00	N	
D4000	D4999	Periodontics	80	Standard	0.00	N	
D5000	D5999	Prosth, remov	50	Standard	0.00	N	
D6000	D6999	Prosth, fixed	50	Standard	0.00	N	
D7000	D7999	Oral Surgery	80	Standard	0.00	N	
D8000	D8999	Orthodontics	50	Standard	0.00	N	
D9000	D9999	General Service	80	Standard	0.00	N	
Coverage Table 2: All Procedures (Cap Plan)							
BEGIN PROC	END PROC	CATEGORY	COV %	DEDUCTIBLE	CO PAY	PRE AUTH?	
D0110	D0110	Initial oral ex	100	Standard	0.00	N	
D0120	D0120	Periodic oral x	100	Standard	0.00	N	
D0130	D0130	Emergency oral	100	Standard	0.00	N	
D0210	D0210	Intraoral-compl	100	Standard	0.00	N	
D0220	D0220	Intraoral-peria	100	Standard	0.00	N	
D0230	D0230	Intraoral-peria	100	Standard	0.00	N	
D0240	D0240	Intraoral-occlu	100	Standard	0.00	N	
D0250	D0250	Extraoral-first	100	Standard	0.00	N	
D0260	D0260	Extraoral-each	100	Standard	0.00	N	
D0270	D0270	Bitewing-single	100	Standard	0.00	N	
D0272	D0272	Bitewings-two f	100	Standard	0.00	N	
D0274	D0274	Bitewings-four	100	Standard	0.00	N	
D0290	D0290	Skull &facial b	100	Standard	0.00	N	
D0315	D0315	Saliography	100	Standard	0.00	N	
D0320	D0320	TMJ arthrogram,	100	Standard	0.00	N	
D0321	D0321	Other TMJ films	100	Standard	0.00	N	
D0322	D0322	Tomographic sur	100	Standard	0.00	N	
D0330	D0330	Panoramic film	100	Standard	0.00	N	
D0340	D0340	Cephalometric f	100	Standard	0.00	N	
D0415	D0415	Bacteriologic s	100	Standard	0.00	N	
D0425	D0425	Caries suscepti	100	Standard	0.00	N	
D0460	D0460	Pulp vitality t	100	Standard	0.00	N	
D0470	D0470	Diagnostic cast	100	Standard	0.00	N	
D0471	D0471	Diagnostic phot	100	Standard	0.00	N	
D0501	D0501	Histopathologic	100	Standard	0.00	N	
D0502	D0502	Other oral path	100	Standard	0.00	N	
D0999	D0999	Unspecified dia	100	Standard	0.00	N	
D1110	D1110	Prophylaxis-adu	100	Standard	0.00	N	
D1120	D1120	Prophylaxis-chi	100	Standard	0.00	N	
D1201	D1201	Prophylaxis wit	100	Standard	0.00	N	
D1203	D1203	Fluoride w/o pr	100	Standard	0.00	N	
D1204	D1204	Fluoride w/o pr	100	Standard	0.00	N	
D1205	D1205	Prophylaxis wit	100	Standard	0.00	N	



How do I run the Standard Coverage Tables Report?

In the Office Manager, from the **Reports** menu, point to **Reference**, and then click **Standard Coverage Tables**. For additional details about running this report, see the “Standard Coverage Table Report” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The following report information is found in the **Insurance Coverage Table** dialog box, which can be accessed in the Office Manager. See the “Adding and editing insurance plans” topic in the Dentrix Enterprise Help for details on how to edit this information.

- A. Cov %** – The percentage of a procedure covered by the insurance carrier.
- B. Deductible** – The type of deductible (for example, None, Standard, Preventive, or Other).
- C. Co Pay** – The co-pay amount.
- D. Pre Auth?** – Indicates whether or not a procedure group requires pre-authorization from the insurance carrier.

Insurance Coverage - (Aetna Dental/HSPS Aetna)

Deductible				Maximum Benefit	
	Lifetime Individual	Annual Individual	Annual Family	Individual:	Family:
Standard	0	500	1500	50000	15000
Preventive	0	1000	3000		
Other	0	1500	4500		

Claim Deadline: >>

Ortho Plan - Use as Ortho Lifetime Max

Coverage Table							(A)	(B)	(C)	(D)
Beg Proc	End Proc	Category	%	Dea	Co-Pay	Exst				
D0100	D1999	Diag/Preventive	100	St	0.00					
D0100	-D1999	Diag/Preventive	100	S	0.00	N				
D2000	-D2699	Basic Restor	80	S	0.00	N				
D2700	-D2899	Crowns	50	S	0.00	N				
D2900	-D2999	Restorative	80	S	0.00	N				
D3000	-D3999	Endodontics	80	S	0.00	N				
D4000	-D4999	Periodontics	80	S	0.00	N				
D5000	-D5999	Prosthodontics	50	S	0.00	N				

Select Category

Co-Payment Calculations for Ins. Portion:

- Total Fee x Coverage %
- (Total Fee - Co-Pay) x Cov %
- (Total Fee x Cov %) - Co-Pay

Select Table: >>

Notes OK Cancel

Suspended Credits Report

The Suspended Credits Report lists payments and credits that have been suspended. The report includes the guarantor of the account; the date, description, and amount of the credit; the amount that has been suspended; the balance on the Ledger; and the collecting clinic.

\$	Why: To track accounts with suspended payments and/or credits
	When: Monthly

Suspended Credits Report							
All Current Suspended Credits Clinics: <ALL> Billing Types: <ALL> Guarantor Range: <ALL> - <ALL> Sort By: Date							
Report Date: 05/05/2018		Report Generated By: enterprise				Page 1 of 1	
Entry Date	Proc Date	Patient Name	Description	Amount	Suspended	Clinic	
Clinic: CENTRAL							
Guarantor: Reeves, Joshua		BT:1	Ledger Balance: -100.00	Ledger Suspended: -100.00			
A	B	04/27/2018	04/27/2018 <FAMILY>	-Professional Discount	-25.00	-25.00	CENTRAL
		04/30/2018	04/30/2018 <FAMILY>	-Credit Adjustment	-25.00	-25.00	CENTRAL
		05/01/2018	05/01/2018 <FAMILY>	-Credit Adjustment	-50.00	-50.00	CENTRAL
				Guarantor's Report Total:	-100.00		
Guarantor: Winters, Carl		BT:1	Ledger Balance: -900.00	Ledger Suspended: -900.00			
		04/30/2018	04/30/2018 <FAMILY>	Initial Balance	-900.00	-900.00	CENTRAL
				Guarantor's Report Total:	-900.00		
C				AL Total Suspended Amount:	-1,000.00		
Clinic: MESA							
Guarantor: Smith, Michael		BT:1	Ledger Balance: -25.00	Ledger Suspended: -25.00			
		04/11/2018	04/11/2018 <FAMILY>	Special Adjustment	-25.00	-25.00	MESA
				Guarantor's Report Total:	-25.00		
D				MESA Total Suspended Amount:	-25.00		
D				Total Suspended Amount:	-1,025.00		

How do I run the Suspended Credits Report?

From the DXOne Reporting module, select **Ledger**, and then double-click **Suspended Credits**. For additional details about running this report, see the "Suspended Credits Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

For each collecting clinic on the report, the following information appears:

- A. Account Details** – For each guarantor listed on the report, the following account details are shown:
- **Ledger Balance** – The account balance.
 - **Ledger Suspended** – The total suspended credit amount on the account.
 - **Report Total** – The total amount of the suspended credits listed on the report for the guarantor.
- B. Credit Details** – For each credit, the following details are shown: entry date, procedure date, patient name, adjustment description, amount of the adjustment, amount that was suspended, and clinic.
- C. Clinic Total** – The total amount of the suspended credits listed for the clinic.
- D. Grand Total** – The total amount of the suspended credits listed for all clinics on the report.

Treatment Case Report

The Treatment Case Report displays treatment-planned procedures for a specific treatment plan case. The report may also include other items, such as the patient's graphical chart and account information, case notes, and insurance information.

	Why: To print a treatment case created for a patient
	When: As needed

The Dentist Group

Name	James S. Abbott
Birthdate	11/11/1962
SSN	000-00-0041
Chart Number	ABB101

.: TREATMENT CASE

DATE	VISIT	TH	SURF	CODE	PROV	DESCRIPTION	FEE	PAT	PRI INS	SEC INS	BSofPA	
03/08/2018	1	4	D	D2110	DDS9		151.00	0.00	60.00	91.00	101.30	
Notes: Drilled and filled w/o problem.												
Visit 1 Totals:							151.00	0.00	60.00	91.00	101.30	
03/08/2018	2	13		D7280	DDS9	Surgical method to expose a covered tooth so it can grow in normally	350.00	240.00	100.00	10.00	101.30	
Visit 2 Totals:							350.00	240.00	100.00	10.00	101.30	
03/08/2018	3	19		D2750	DDS9	Crown restoration made of porcelain fused to high noble metal (has a strong, hypo-allergenic base)	713.00	142.60	0.00	570.40	101.30	
Visit 3 Totals:							713.00	142.60	0.00	570.40	101.30	

INSURANCE PROVIDER(S)

Primary	Secondary
Allied Group Insurance Trust	Aetna Life and Casualty

TOTALS

Fee	Pat	Pri Ins	Sec Ins	BSofPA
1214.00	382.60	160.00	671.40	303.90

FINANCIAL SUMMARY

Treatment Plan Total	1214.00
Estimated Deductible to be Applied	75.00
Estimated Insurance Payment	831.40
Estimated Patient's Portion	382.60
Finance Status	
Patient Balance	-12430.55
Family Balance	52.00
Fee Expiration Date	03/08/2012

DENTAL INSURANCE BENEFITS




	Patient		Family	
	Primary	Secondary	Primary	Secondary
Annual Plan Benefits	1500.00	2000.00	0.00	9000.00
Paid Benefits YTD	0.00	0.00	0.00	0.00
Pending Insurance Est. YTD	0.00	0.00	0.00	0.00
Est. Benefits Remaining YTD	1500.00	2000.00	0.00	9000.00
Benefits Expire	12/31/2011	12/31/2011	12/31/2011	12/31/2011
Deductible Owed YTD	Standard 50.00	25.00	50.00	0.00
	Preventative 0.00	0.00	0.00	0.00
	Other 0.00	0.00	0.00	0.00

Alternate Cases: New Case

Case Notes: - Tue - Mar 08 2018 -
 Patient will call back for an appointment if he wants to move forward with the treatment.

1234 Pine St
 American Fork, UT 84003
 PHONE: (801)555-1942
 REPORT 03/08/

Dentrix Enterprise 11.0 Reports Reference

.: Consent for Treatment	
Enter the consent form text here	
D2110:Amalgam-1 surface, primary [4 D]; Entry Date: 3/8/2011; Date: 3/8/2011;Visit: 1; Provider: DDS9; Fee: \$151.00; Other Fee BSofPA: \$101.30; Patient Portion: \$0.00; Primary Insurance Estimate: \$100.00; Secondary Insurance Estimate: \$51.00	
D7280:Surgical access unreupted tooth [13]; Entry Date: 3/8/2011; Date: 3/8/2011;Visit: 2; Provider: DDS9; Fee: \$350.00; Other Fee BSofPA: \$101.30; Patient Portion: \$240.00; Primary Insurance Estimate: \$100.00; Secondary Insurance Estimate: \$10.00	
D2750:Crown-porc fuse high noble mtl [19]; Entry Date: 3/8/2011; Date: 3/8/2011;Visit: 3; Provider: DDS9; Fee: \$713.00; Other Fee BSofPA: \$101.30; Patient Portion: \$713.00; Primary Insurance Estimate: \$0.00; Secondary Insurance Estimate: \$0.00	
	
Patient/Representative Signature:	Practice Signature:
	
Name: James S. Abbott Date: 03/08/2011	Name: Dennis Smith, D.D.S Date: 03/08/2011
1224 Pine St American Fork, UT 84003 PHONE: (801)555-1942 REPORT DATE: 03/08/2011 page 02	

How do I run the Treatment Case Report?

1. In the Treatment Planner, select the case of which you want to generate a report.
2. From the **File** menu, point to **Print**, and then click **Print Treatment Case**.


For additional details about running this report, see the "Printing the Treatment Case Report" topic in the Treatment Planner portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Treatment** – The treatment-planned procedures are grouped by visit. A subtotal of fees, patient portions, and insurance estimates for each visit are given. If a treatment-planned procedure has notes entered, those notes appear after the treatment details of that procedure.
- B. Insurance Estimates** – The patient's insurance carriers are listed along with the fees, patient portions, and insurance estimates for the entire treatment plan.
- C. Graphical Chart** – The patient's graphical chart is shown with all applicable treatment and conditions that have a paint type.
- D. Financial Summary** – The treatment plan total, patient and insurance estimates, and account information are shown.
- E. Insurance Benefits** – Details of the current insurance plan maximums and deductibles for the patient and family are shown.
- F. Treatment Case Note** – Any linked cases are listed, and any notes attached to the case are shown.
- G. Consent Forms** – Any consent forms and corresponding signatures that are attached to the case are printed on separate pages.

Treatment Plan Approval Report

The Treatment Plan Approval Report displays all treatment-planned procedures.

	Why: To ensure the practice follows up on treatment plans When: Weekly
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TREATMENT PLAN APPROVAL REPORT											
CENTRAL 03/08/2018 - 03/08/2018											
Sorted By: Patient Providers: ALL Providers											
03/08/2018											
Page: 1											
Chart #	Patient	Home Phone	Patient DOB	Employer	Guarantor	Primary Insurance Carrier	Secondary Insurance Carrier	Group #	Last Elig Date	Ben Remain	Out
Prov	Date	Code	Tooth	Surfaces	Description	Order	Appt Date	Amount	Pri Ins Est	Sec Ins Est	Pri Pre-Est
LIT102	Little, Brian (801)555-6241		11/11/1981		Little, Dean	Aetna Life and Casualty	Aetna Life and Casualty	CS1740 321863	01/01/2018 01/01/2018	3000.00 2000.00	
DDS1	03/08/2018	D6792	16		Retainer crn-full cast nob met	0	03/14/2018	570.00	550.00	20.00	03/08/2018
DDS1	03/08/2018	D6792	17		Retainer crn-full cast nob met	0	03/14/2018	540.00	540.00	0.00	03/08/2018
DDS1	03/08/2018	D6970	22		Post/core + brdg retainer, fabr	0		230.00	230.00	0.00	03/08/2018
LIT101	Little, Carol (801)555-6241		11/11/1960		Little, Dean	Aetna Life and Casualty	Aetna Life and Casualty	CS1740 321863	01/01/2018 01/01/2018	2000.00 3000.00	
DDS1	03/08/2018	D6750	1		Retainer crn-porc fused-hi nob	0	03/14/2018	614.00	471.20	142.80	03/08/2018
DDS1	03/08/2018	D6240	2		Pontic-porcelain fused to hnob	0	03/14/2018	621.00	496.80	124.20	03/08/2018
DDS1	03/08/2018	D6750	3		Retainer crn-porc fused-hi nob	0	03/14/2018	614.00	491.20	122.80	03/08/2018
DDS1	03/08/2018	D6750	5		Retainer crn-porc fused-hi nob	0		614.00	491.20	122.80	03/08/2018
DDS1	03/08/2018	D6240	6		Pontic-porcelain fused to hnob	0	03/14/2018	621.00	49.60	571.40	03/08/2018
DDS1	03/08/2018	D6750	7		Retainer crn-porc fused-hi nob	0		614.00	0.00	613.00	03/08/2018
LIT105	Little, Chad (801)555-6241		11/11/1988		Little, Dean	Aetna Life and Casualty	Aetna Life and Casualty	CS1740 321863	01/01/2018 01/01/2018	3000.00 2000.00	
DDS1	03/08/2018	D1120			Prophylaxis-child	0	03/14/2018	1240.00	14.00	972.00	03/08/2018
DDS1	03/08/2018	D2110	6	D	Amalgam-1 surface, primary	0	03/14/2018	300.00	51.00	240.00	03/08/2018
LIT100	Little, Dean (801)555-6241		11/11/1959		Little, Dean	Aetna Life and Casualty	Aetna Life and Casualty	CS1740 321863	01/01/2018 01/01/2018	3000.00 2000.00	
DDS1	03/08/2018	D0140			Limited oral evaluation	0	03/14/2018	80.00	5.00	44.00	03/08/2018
DDS1	03/08/2018	D0120			Periodic oral evaluation	0	03/14/2018	31.00	20.00	11.00	03/08/2018
DDS1	03/08/2018	D2150	14	MO	Amalgam-2 surf. prim/pern	0		600.00	75.00	480.00	03/08/2018
LIT106	Little, Kevin (801)555-6241		04/23/1990		Little, Dean	Aetna Life and Casualty	Aetna Life and Casualty	CS1740 321863	01/01/2018 01/01/2018	3000.00 2000.00	
DDS1	03/08/2018	D2391	18	O	Resin composite-1s, posterior	0	03/14/2018	274.00	199.20	74.80	03/08/2018
Total of all Treatment Plans:									7563.00		
Total of all Scheduled Treatment Plans:									5505.00		

How do I run the Treatment Plan Approval Report?

In the Office Manager, from the **Reports** menu, point to **Lists**, and then click **Treatment Plan Approval Report**. For additional details about running this report, see the “Treatment Plan Approval Report” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Patient information** – The patient’s name, phone number, insurance company, insurance eligibility, and remaining benefits.
- B. Procedures** – The treatment-planned procedures, insurance estimates, and approval statuses.
- C. Totals**
 - **Total Treatment Plans** – The total amount of all procedures that have been treatment-planned.
 - **Total Scheduled Treatment Plans** – The total amount of all treatment-planned procedures that have been attached to appointments.

Treatment Plan Approval Status Report

The Treatment Plan Approval Status Report displays all treatment-planned procedures for selected approval statuses.

	Why: To ensure the practice follows up on treatment plans
	When: Weekly

TREATMENT PLAN APPROVAL STATUS REPORT											
CENTRAL						03/08/2018 - 03/08/2018					
Sorted By: Patient						Providers: ALL Providers			Page: 1		
Chart #	Patient	Patient DOB	Guarantor	Primary Insurance Carrier	Group #	Last Elig Date	Ben Remain	Out			
Prov	Home Phone	Employer	Surfaces	Secondary Insurance Carrier	Group #	Last Elig Date	Ben Remain	Out			
Date	Code	Tooth	Description	Order	Appt Date	Amount	Pri Ins Est	Sec Ins Est	Pri Pre-Est		
LIT102	Little, Brian (801)555-6241	11/11/1981	Little, Dean	Acme Benefits Assoc Aetna Life and Casualty	CS1740 321863	01/01/2018 01/01/2018	3000.00 2000.00				
DDS1	03/08/2018 D6792	16		Retainer crn-full cast nob met	0	03/14/2018	570.00	550.00	20.00		03/08/2
DDS1	03/08/2018 D6792	17		Retainer crn-full cast nob met	0	03/14/2018	540.00	540.00	0.00		03/08/2
DDS1	03/08/2018 D6970	22		Post/core + brdg retainer, fabr	0		230.00	230.00	0.00		03/08/2
LIT101	Little, Carol (801)555-6241	11/11/1960	Little, Dean	Aetna Life and Casualty Acme Benefits Assoc	321863 CS1740	01/01/2018 01/01/2018	2000.00 3000.00				
DDS1	03/08/2018 D6750	1		Retainer crn-porc fused-hi nob	0	03/14/2018	614.00	471.20	142.80		03/08/2
DDS1	03/08/2018 D6240	2		Pontic-porcelain fused to hnob	0	03/14/2018	621.00	496.80	124.20		03/08/2
DDS1	03/08/2018 D6750	3		Retainer crn-porc fused-hi nob	0	03/14/2018	614.00	491.20	122.80		03/08/2
DDS1	03/08/2018 D6750	5		Retainer crn-porc fused-hi nob	0		614.00	491.20	122.80		03/08/2
DDS1	03/08/2018 D6240	6		Pontic-porcelain fused to hnob	0	03/14/2018	621.00	49.60	571.40		03/08/2
DDS1	03/08/2018 D6750	7		Retainer crn-porc fused-hi nob	0		614.00	0.00	613.00		03/08/2
LIT105	Little, Chad (801)555-6241	11/11/1988	Little, Dean	Acme Benefits Assoc Aetna Life and Casualty	CS1740 321863	01/01/2018 01/01/2018	3000.00 2000.00				
DDS1	03/08/2018 D1120			Prophylaxis-child	0	03/14/2018	1240.00	14.00	972.00		03/08/2
DDS1	03/08/2018 D2110	6	D	Amalgam-1 surface, primary	0	03/14/2018	300.00	51.00	240.00		03/08/2
LIT100	Little, Dean (801)555-6241	11/11/1959	Little, Dean	Acme Benefits Assoc Aetna Life and Casualty	CS1740 321863	01/01/2018 01/01/2018	3000.00 2000.00				
DDS1	03/08/2018 D0140			Limited oral evaluation	0	03/14/2018	80.00	5.00	44.00		03/08/2
DDS1	03/08/2018 D0120			Periodic oral evaluation	0	03/14/2018	31.00	20.00	11.00		03/08/2
DDS1	03/08/2018 D2150	14	MO	Amalgam-2 surf. prim/perm	0		600.00	75.00	480.00		03/08/2
LIT106	Little, Kevin (801)555-6241	04/23/1990	Little, Dean	Acme Benefits Assoc Aetna Life and Casualty	CS1740 321863	01/01/2018 01/01/2018	3000.00 2000.00				
DDS1	03/08/2018 D2391	18	O	Resin composite-1s, posterior	0	03/14/2018	274.00	199.20	74.80		03/08/2
Total of all Treatment Plans:						7563.00					
Total of all Scheduled Treatment Plans:						5505.00					

How do I run the Treatment Plan Approval Status Report?

In the Office Manager, from the **Reports** menu, point to **Lists**, and then click **Treatment Plan Approval Status Report**. For additional details about running this report, see the "Treatment Plan Approval Status Report" topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Patient information** – The patient's name, phone number, insurance company, insurance eligibility, and remaining benefits.
- B. Procedures** – The treatment-planned procedures, insurance estimates, and approval statuses.
- C. Totals**
 - **Total Treatment Plans** – The total amount of all procedures that have been treatment-planned.
 - **Total Scheduled Treatment Plans** – The total amount of all treatment-planned procedures that have been attached to appointments.

Truth in Lending Disclosure Statement

The Truth in Lending disclosure statement is a legal document used to clarify the terms of a payment agreement. You might want to print this report and provide it to patients at the time a payment agreement is created.



Why: To ensure patients are adequately informed of the terms of a payment agreement

When: After creating a payment agreement, and as needed

PRACTICE NAME AND ADDRESS

The Allied Dentist Group
123 East Valley Dr
American Fork, UT 84003
(801)555-9300

GUARANTOR NAME AND ADDRESS

Patricia Abbott
1234 Oak St
Murray, UT 84123
555-1586

Date: 04/23/2011
Chart #: ABB102
SS #: 000-00-0000
Loan Amount: \$ 5956.04
Interest Rate: 12.000 %

FEDERAL TRUTH-IN-LENDING DISCLOSURE STATEMENT

ANNUAL PERCENTAGE RATE

The cost of your credit as a yearly rate.

12.683 %

FINANCE CHARGE

The dollar amount the credit will cost you.

\$ 214.40

AMOUNT FINANCED

The amount of credit provided to you or on your behalf.

\$ 5956.04

TOTAL OF PAYMENTS

The amount you will have paid after you have made all payments as scheduled.

\$ 6170.44

PAYMENT SCHEDULE SUMMARY

Num Payments: 6

Amt Each Payment: \$1000.00


First Payment Due: 04/30/2018

Last Payment Amt: \$1170.44

Last Payment Due: 09/30/2018

Late Charge: If any payment is late, you will be charged 0.417% of the installment, or at least \$20.00.

How do I generate a truth in lending statement?

1. From the Ledger, click the Payment Agreement button  to open the **Billing/Payment Agreement Information** dialog box.
2. Click **Print** to open the **Print for Payment Agreement** dialog box.
3. Select **Truth in Lending Disclosure Statement**.
4. Click **Print** or **Send to Batch**.

For additional details about running this report, see the "Printing payment agreement documents" topic in the Ledger portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

UDS - Age/Gender Report

The UDS - Age/Gender report lists the patients of each gender for each age group and provides totals, using the UDS (Uniform Data System) standards for reporting.



Why: To generate a record of patient genders and ages for UDS reporting for comparison with national data, and to provide gender and age data for patients to grantees, partners, and communities

When: As needed

AGE/GENDER REPORT

01/01/2017 - 12/31/2017 Procedure Date

Clinics: AF, CENTRAL, DRAPER

Providers: <ALL>

Billing Types: <ALL>

ADA Codes: <ALL>

Ages: <ALL>

Report Date: 12/31/2017

Report Generated By: enterprise

Page 1 of 1

AGE	MALE	FEMALE	OTHER	UNKNOWN	TOTAL	
PATIENT NAME	SOCIAL SECURITY #	EMR #	CHART #	BIRTHDATE	GENDER	
AGE 21	1	1	0	0	2	
Little, Brian	000-00-0000		LIT123	11/11/1987	Male	
Perkins, Shelly	000-00-0000		PER123	11/11/1987	Female	
AGE 22	1	1	0	0	2	
Johnson Roger	000-00-0000		JOH123	11/11/1986	Male	
Perkins, Peggy	000-00-0000		PER124	11/11/1986	Female	
AGE 38	2	0	0	0	2	
Gleason, Gary	000-00-0000		GLE123	11/11/1970	Male	
Smith, Michael	000-00-0000		SMI123	11/11/1970	Male	
AGE 40	1	1	0	0	2	
Little, Carol	000-00-0000		LIT124	11/11/1969	Female	
Taylor, Mark	000-00-0000		TAY123	11/11/1969	Male	
AGE 49	2	0	0	0	2	
Abbott, James S	000-00-0000		ABB123	11/11/1960	Male	
Perkins, Samuel	000-00-0000		PER127	11/11/1960	Male	
AGE 51	2	0	0	0	2	
Little, Matthew	000-00-0000		LIT129	11/11/1957	Male	
Nelson, Chris	000-00-0000		NEL123	11/11/1957	Male	
AGE 60	1	0	0	0	1	
Taylor, Lissa	000-00-0000		TAY123	11/11/1949	Female	
GRAND TOTALS	10	3	0	0	13	

E

DDS01						
CENTRAL						
AGE 22	0	1	0	0	1	
Perkins, Peggy	000-00-0000			PER007	11/11/1987	Female
AGE 38	1	0	0	0	1	
Smith, Michael	000-00-0000			SMI008	11/11/1970	Male
AGE 49	1	0	0	0	1	
Perkins, John	000-00-0000			PER008	11/11/1960	Male
CENTRAL TOTALS	2	1	0	0	3	
DDS01 TOTALS	2	1	0	0	3	

F

CENTRAL						
DDS01						
AGE 22	0	1	0	0	1	
Perkins, Peggy	000-00-0000			PER123	11/11/1987	Female
AGE 38	1	0	0	0	1	
Smith, Michael	000-00-0000			SMI123	11/11/1970	Male
AGE 49	1	0	0	0	1	
Perkins, Scott	000-00-0000			PER124	11/11/1960	Male
DDS01 TOTALS	2	1	0	0	3	
DDS1						
AGE 21	1	0	0	0	1	
Little, Brian R	000-00-0000			LIT126	11/11/1986	Male
AGE 51	2	0	0	0	2	
Myers, Timothy	000-00-0000			MYE123	11/11/1957	Male
Perkins, Shelly	000-00-0000			PER125	11/11/1957	Female
DDS1 TOTALS	3	0	0	0	3	
DROBB						
AGE 49	1	0	0	0	1	
Abbott, James S	000-00-0000			ABB125	11/11/1960	Male
DROBB TOTALS	1	0	0	0	1	
MCCLURE						
AGE 40	1	0	0	0	1	
Taylor, Mark	000-00-0000			TAY123	11/11/1969	Male
MCCLURE TOTALS	1	0	0	0	1	
CENTRAL TOTALS	7	1	0	0	8	

How do I run the UDS - Age/Gender Report?

From the DXOne Reporting module, select **UDS**, and then double-click **UDS - Age/Gender**. For additional details about running this report, see the "UDS - Age/Gender Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).


What important information does this report provide?

The report can be grouped and subtotaled by provider with a breakdown by clinic. Or, the report can be grouped and subtotaled by clinic with a breakdown by provider. The following information appears on the report:

- A. Age** – The patient's age.
- B. Patient** – The patient's name, Social Security number, EMR number, Chart number, birthdate, and gender. (This information appears only if **Include Patient Info** is selected when setting up options for this report.)
- C. Gender Totals** – The number of patients of the given age for each gender (male, female, other, and unknown) and a total of all genders for patients of the given age.
- D. Grand Totals** – The gender totals for all ages that appear on the report.
- E. Provider Totals** – The gender totals of patients of all the given ages whose primary provider is the given provider.
- F. Clinic Totals** – The gender totals of patients of all the given ages that visit the given clinic.

UDS - Encounters and Users by Selected Procedure Codes Report

The UDS - Encounters and Users by Selected Procedure Codes Report displays the number of patient encounters with primary and secondary providers that performed procedures in the specified range, using the UDS (Uniform Data System) standards for reporting.

	Why: To generate a record of patient encounters for UDS reporting for comparison with national data, and to provide patient encounter data to grantees, partners, and communities
	When: As needed

Encounters and Users by Selected Procedure Codes

05/13/2018 - 05/13/2018 Procedure Date
Clinics: <ALL>
Providers: <ALL>
Billing Types: <ALL>
ADA Codes: <ALL>

Report Date: 05/13/2018

Report Generated By: enterprise

Page 1 of 1

A

# Encounters:	51
# Users:	27

B

How do I run the UDS - Encounters and Users by Selected Procedure Codes Report?

From the DXOne Reporting module, select **UDS**, and then double-click **UDS - Encounter/User Statistics**. For additional details about running this report, see the “UDS - Encounter and User Statistics Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Encounters** – The total number of patient encounters with providers.
- B. Users** – The total number of users that posted the procedures for the corresponding patient encounters total.

UDS - Encounters by Provider Report

The UDS - Encounters by Provider Report displays the number of patient encounters with primary and secondary providers that performed procedures in the specified range, using the UDS (Uniform Data System) standards for reporting.



Why: To generate a record of patient encounters for UDS reporting for comparison with national data, and to provide patient encounter data to grantees, partners, and communities

When: As needed

Encounters by Provider

05/13/2018 - 05/13/2018 Procedure Date
 Clinics: <ALL>
 Providers: <ALL>
 Billing Types: <ALL>
 ADA Codes: <ALL>

Report Date: 05/13/2018

Report Generated By: enterprise

Page 1 of 1

PRIMARY PROVIDERS

Total # Encounters: 51

SECONDARY PROVIDERS

Total # Encounters: 0

A

B

How do I run the UDS - Encounters by Provider Report?

From the DXOne Reporting module, select **UDS**, and then double-click **UDS - Encounter/User Statistics**. For additional details about running this report, see the “UDS - Encounter and User Statistics Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Encounters (Primary)** – The total number of patient encounters with primary providers.
- B. Encounters (Secondary)** – The total number of patient encounters with secondary providers.

UDS - Insurance Financial Class Report

The UDS - Insurance Financial Class Report lists the patients of the specified financial classes that had procedures performed and provides totals, using the UDS (Uniform Data System) standards for reporting.

Why: To generate a record of financial class statistics for UDS reporting for comparison with national data, and to provide financial class statistics to grantees, partners, and communities

When: As needed

INSURANCE FINANCIAL CLASS - UDS				
05/13/2018 - 05/13/2018 Procedure Date				
Clinics: <ALL>				
Providers: <ALL>				
Billing Types: <ALL>				
ADA Codes: <ALL>				
Financial Classes: <ALL>				
Report Date: 05/13/2018		Report Generated By: enterprise		Page 1 of 1
FINANCIAL CLASS TYPES		-19 YEARS OF AGE	20+ YEARS OF AGE	TOTAL # USERS
PATIENT NAME	SOCIAL SECURITY #	EMR #	CHART #	BIRTHDATE
Uninsured/Self-Pay		0	4	4
Gleason, Gary	000-00-0000		GL0005	11/11/1970
Johnson, Ron J	000-00-0000		JO0005	11/11/1986
Little, Carol	000-00-0000		LIM0005	11/11/1969
Smith, Michael P	000-00-0000		SM0005	11/11/1950
GRAND TOTALS		0	4	4

A

B

C

D

DDS1				
DRAPER				
Uninsured/Self-Pay		0	3	3
Gleason, Gary	000-00-0000		GL0005	11/11/1970
Johnson, Ron J	000-00-0000		JO0005	11/11/1986
Little, Carol	000-00-0000		LI0005	11/11/1969
DRAPER TOTALS		0	3	3
DDS1 TOTALS		0	3	3

E

DRAPER				
DDS1				
Uninsured/Self-Pay		0	3	3
Gleason, Gary	000-00-0000		GL0005	11/11/1970
Johnson, Ron J	000-00-0000		JO0005	11/11/1986
Little, Carol	000-00-0000		LI0005	11/11/1969
DDS1 TOTALS		0	3	3
DRAPER TOTALS		0	3	3

How do I run the UDS - Insurance Financial Class Report?

From the DXOne Reporting module, select **UDS**, and then double-click **UDS - Insurance Financial Class (2012 and Prior)**. For additional details about running this report, see the "UDS - Insurance Financial Class Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).


What important information does this report provide?

The report can be grouped and subtotaled by provider with a breakdown by clinic. Or, the report can be grouped and subtotaled by clinic with a breakdown by provider. The following information appears on the report:

- A. Financial Class** – The financial class with totals by age range and a total number of users that posted the procedures.
- B. Patient** – The patient’s name, Social Security number, EMR number, Chart number, and birthdate. (This information appears only if **Include Patient Info** is selected when setting up options for this report.)
- C. Grand Totals** – The totals for all financial classes that appear on the report.
- D. Provider Totals** – The financial class totals for patients of the given provider.
- E. Clinic Totals** – The financial class totals for patients that visit the given clinic.

UDS - Insurance Financial Class Report (2013)

The UDS - Insurance Financial Class Report (2013) lists the patients of the specified financial classes that had procedures performed and provides totals, using the UDS (Uniform Data System) standards for reporting.



Why: To generate a record of financial class statistics for UDS reporting for comparison with national data, and to provide financial class statistics to grantees, partners, and communities

When: As needed

Insurance Financial Class						
10/01/2017 - 12/31/2017 Entry Date Insurance Type: Medical Insurance Clinics: <ALL> Providers: DSMITH Billing Types: <ALL> ADA Codes: <ALL> Financial Classes: <ALL>						
Report Date: 01/20/2018			Report Generated By: DSMITH		Page 1 of 1	
Clinic						
Provider						
Zip Code						
Financial Class	Count	0-17 Years Old		18+ Years Old		
PATIENT NAME	CHART #	CLINIC	PROVIDER	BIRTHDATE	SSN	EMR #
AF	1				0	1
DSMITH	1				0	1
84003	1				0	1
<No Insurance>	1				0	1
Crosby, Brent		CR0004C	AF	DSMITH	11/11/1973	123-45-6789
ALPINE	1				1	0
DSMITH	1				1	0
84003	1				1	0
Other Public, Inc Non-Medicaid CHIP (MC Capitated)	1				1	0
Allen, Test		1234567890-12345	ALPINE	DSMITH	02/15/1998	123-33-4444 11225
		Totals:		Count	0-17 Years Old	18+ Years Old
				2	1	1

A

B

C

Totals Only (with Patient Information)

PATIENT NAME	CHART #	CLINIC	PROVIDER	BIRTHDATE	SSN	EMR #
Allen, Test	AL00012	ALPINE	DSMITH	02/15/1998	123-33-4444	11225
Crosby, Brent	CR0004C	AF	DSMITH	11/11/1973	123-45-6789	
			Count	0-17 Years Old	18+ Years Old	
Totals:			2	1	1	

Grouped Only by Financial Class

Financial Class	Count	0-17 Years Old	18+ Years Old	
<No Insurance>	1	0	1	
Other Public, Inc Non-Medicaid CHIP (MC Capitated)	1	1	0	
		Count	0-17 Years Old	18+ Years Old
Totals:		2	1	1

How do I run the UDS - Insurance Financial Class Report (2013)?

From the DXOne Reporting module, select **UDS**, and then double-click **UDS - Insurance Financial Class (2013)**. For additional details about running this report, see the "UDS - Insurance Financial Class Report (2013)" topic in the DXOne Reporting portion of the Dentrax Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

There are five categories that you can use to group totals on the report: None, Clinic, Provider, ZIP Code, and Financial Class. The report displays totals without any groupings if "None" is selected for all **Group By** options when setting up options for this report; otherwise, the report groups totals by the first, and then the second, and then the third, and then the fourth selection. The following information appears on the report:

A. Group Totals – Any of the following groups and the corresponding totals may appear:


- **Clinic** – The financial class totals for patients that visit the given clinic.
- **Provider** – The financial class totals for patients with the given primary provider.
- **Zip Code** – The financial class totals for patients with the given ZIP Code.
- **Financial Class** – The financial class with totals by age range and a total number of users that posted the procedures.

B. Patient – The patient's name, Social Security number, EMR number, Chart number, primary provider, and birthdate. (This information appears only if **Include Patient Info** is selected when setting up options for this report.)

C. Grand Totals – The total number of financial classes that appear on the report. Of the total, the number of patients in the first age group appear. Of the total, the number of patients in the second age group appear.

UDS - Medicaid/Medicare Report

The UDS - Medicaid/Medicare Report displays a count of patients with Medicaid and/or Medicare and who have had a visit within the reporting period. Patients are counted on the report if they have had claims created during the reporting period for any insurance plans that have the specified financial classes attached.

	<p>Why: To generate a record of Medicaid and Medicare patients for UDS reporting for comparison with national data, and to provide Medicare/Medicaid patient statistics to grantees, partners, and communities</p> <p>When: As needed</p>
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Medicaid/Medicare Insurance						
01/01/2018 - 01/04/2018 (Date based on claim create date) Medicaid: Medicaid, Non-Managed Care, Medicaid, Managed Care (capitated) Medicare: Medicare, Non-Managed Care, Medicare, Managed Care (fee-for-service)						
Report Date: 1/4/2018	Report Generated By: enterprise				Page 1 of 1	
PATIENT NAME	CHART #	CLINIC	PROVIDER	BIRTHDATE	SSN	EMR #
Blair, Mark	BL84	AF	DESMITH	11/11/2006		
Blair, Mary	BL0062	AF	MCOOK	05/02/1951	111-11-1111	
Test, Test T	TESTTTLONG	CENTRAL	DSMITH	02/16/1998	222-22-2222	TEST

	Count	0-17 Years Old	18+ Years Old
Medicaid	2	1	1
Medicare	1	0	1
Both Medicaid and Medicare	0	0	0

How do I run the UDS - Medicaid/Medicare Report?

From the DXOne Reporting module, select **UDS**, and then double-click **UDS - Medicaid/Medicare**. For additional details about running this report, see the “UDS - Medicaid/Medicare Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report can be grouped by Clinic, Provider, ZIP Code, and/or Financial Class. The report includes the following information:


- A. Patient** – The patient’s name, Social Security number, EMR number, Chart number, birth date, assigned clinic, and primary provider. (This information appears only if **Include Patient Info** is selected when setting up options for this report.)
- B. Statistics** – The report presents the following statistics:
- Total number of Medicaid patients, and the count is broken down by age groups.
 - Total number of Medicare patients, and the count is broken down by age groups.
 - Total number of Medicaid and Medicare patients, and the count is broken down by age groups.

Notes:

- *The age group counts appear only if **Include Age Groups** is selected when setting up options for this report*
- *The clinics and providers for the report are determined by each patient’s default provider and clinic (as set up from the Family File).*

UDS - Patient Related Revenue Report

The UDS - Patient Related Revenue Report displays revenue totals for patients with procedures that were completed within a specified date range and for which claims have been created. This report uses the UDS (Uniform Data System) standards for reporting.



Why: To generate a record of revenue for UDS reporting for comparison with national data, and to provide revenue totals to grantees, partners, and communities

When: As needed

Server Name: <Default>

PATIENT RELATED REVENUE

12/17/2018 - 12/17/2018 Procedure Date
Clinics: <ALL>
ADA Codes: <ALL>
Report Generated By: DSMITH

Report Date: 12/17/2018 Page 1 of 1

Payer Category	Full Charges This Period	Amount Collected This Period (-)	Retroactive Settlements, Receipts and Paybacks				Allowances	Sliding Discounts	Bad Debt Write-Off
			Collection of Reconciliation/Wrap Around Current Year	Collection of Reconciliation/Wrap Around Previous Years	Collection of Other Retro Payments: P4P, Risk Pools, Withholds, etc.	Penalty/Payback			
Medicaid, MC	794.00	744.00	0.00	0.00	0.00	0.00	-50.00		
Reyes, Jose	794.00	744.00	0.00	0.00	0.00	0.00	-50.00		
Medicaid, Non-MC	794.00	794.00	-50.00	0.00	0.00	0.00	0.00		
Reyes, Olivia	794.00	794.00	-50.00	0.00	0.00	0.00	0.00		
Total Medicaid	1,588.00	1,538.00	-50.00	0.00	0.00	0.00	-50.00		
Medicare, MC	794.00	794.00	0.00	0.00	-50.00	0.00	0.00		
Reed, Sandy	794.00	794.00	0.00	0.00	-50.00	0.00	0.00		
Medicare, Non-MC	734.00	694.00	0.00	0.00	0.00	50.00	0.00		
Jackson, Paul	734.00	694.00	0.00	0.00	0.00	50.00	0.00		
Total Medicare	1,528.00	1,488.00	0.00	0.00	-50.00	50.00	0.00		
Other Public, MC	539.00	539.00	0.00	0.00	0.00	0.00	0.00		
Reyes, Emilio	539.00	539.00	0.00	0.00	0.00	0.00	0.00		
Other Public, Non-MC	544.00	544.00	0.00	0.00	0.00	0.00	0.00		
Jones, Paula	544.00	544.00	0.00	0.00	0.00	0.00	0.00		
Total Other Public	1,083.00	1,083.00	0.00	0.00	0.00	0.00	0.00		
Private Comm	544.00	544.00			0.00	0.00	0.00		
Morales, Debbie	544.00	544.00			0.00	0.00	0.00		
Private Non-MC	544.00	544.00			0.00	0.00	0.00		
Fisher, Dan	544.00	544.00			0.00	0.00	0.00		
Total Private	1,088.00	1,088.00			0.00	0.00	0.00		
Individual	994.00	669.00						-200.00	0.00
Tran, Thomas	994.00	669.00						-200.00	0.00
Self-Pay	2,099.00	1,808.00						0.00	-291.00
Jones, Michael	2,099.00	1,808.00						0.00	-291.00
Total Self-Pay	3,093.00	2,477.00						-200.00	-291.00
Total	8,380.00	7,674.00	-50.00	0.00	-50.00	50.00	-50.00	-200.00	-291.00

How do I run the UDS - Patient Related Revenue Report?

From the DXOne Reporting module, select **UDS**, and then double-click **UDS - Patient Related Revenue**. For additional details about running this report, see the “UDS - Patient Related Revenue Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

Patients on the report are grouped by financial class within each corresponding payer category.

A. Financial class – A breakdown of the charges, collections, retroactive collections, allowances, sliding discounts, and write-offs for payers of this financial class.

B. Patient – A breakdown of the charges, collections, retroactive collections, allowances, sliding discounts, and write-offs for a patient.

*Note: The report includes patient breakdowns only if **Include Patient Info** is selected when setting up options for this report.*

C. Payer category total – A breakdown of the total charges, collections, retroactive collections, allowances, sliding discounts, and write-offs for payers of the same type of financial class.


D. Grand total – A breakdown of the sum of the total charges, collections, retroactive collections, allowances, sliding discounts, and write-offs for payers in all categories.

Notes:

- *Sliding discounts and write-offs apply only to uninsured individuals, self-pay patients, and insured patient whose charges are not billed to insurance.*
- *Retroactive collections and allowances apply only to insured patients.*
- *The report includes suspended payments and adjustments only if **Include Suspended Payments and Adjustments** is selected when setting up options for this report.*

UDS - Patient Status Report

The UDS - Patient Status Report displays the total the number of patients who have completed procedures within a specified date range and who have specified statuses (race, language, poverty level, worker status, homeless status, sexual orientation, homeless status, veteran status, ethnicity, religion, user-defined, housing status, and/or gender identity) attached to their Family File records. The report can also list patients on the report by ZIP Code (optionally sub-grouped by insurance carrier financial class) and display patient information for the patients on the report. This report uses the UDS (Uniform Data System) standards for reporting.



Why: To generate a record of patient statuses for UDS reporting for comparison with national data, and to provide patient and financial class statistics to grantees, partners, and communities

When: As needed

PATIENT STATUS					
5/14/2018 - 5/14/2018 Procedure Date Clinics: <ALL> Providers: <ALL> Billing Types: <ALL> ADA Codes: <ALL>					
Report Date: 5/14/2018		Report Generated By: enterprise		Page 1 of 1	
REPORT	TOTAL				
PATIENT NAME	SOCIAL SECURITY #	EMR #	CHART #	BIRTHDATE	
Race	5				
County: Utah	5				
Black or African American	1				
Crosby, Brent	111-11-1111		CR93	11/11/1970	
Declined to specify	1				
Abbott, James P	333-33-3333		AB31	11/11/1976	
White	3				
Crosby, Shirley	222-22-2222		CR94	11/11/1972	
Winters, Carl	000-00-0000		WI211	11/11/1980	
Winters, Barbara	000-00-0001		WI212	11/11/1982	
Zip Code Statistics	5				
County: Utah	5				
84003	5				
Crosby, Brent	111-11-1111		CR93	11/11/1970	
Crosby, Shirley	222-22-2222		CR94	11/11/1972	
Abbott, James P	333-33-3333		AB31	11/11/1976	
Winters, Carl	000-00-0000		WI211	11/11/1980	
Winters, Barbara	000-00-0001		WI212	11/11/1982	

A

B

C

D

Race				5
County: Utah				5
Provider: DSMITH				5
Clinic: CENTRAL				5
Black or African American				1
Crosby, Brent	111-11-1111		CR93	11/11/1970
Declined to specify				1
Abbott, James P	333-33-3333		AB31	11/11/1976
White				3
Crosby, Shirley	222-22-2222		CR94	11/11/1972
Winters, Carl	000-00-0000		WI211	11/11/1980
Winters, Barbara	000-00-0001		WI212	11/11/1982

F

Race				5
County: Utah				5
Clinic: CENTRAL				5
Provider: DSMITH				5
Black or African American				1
Crosby, Brent	111-11-1111		CR93	11/11/1970
Declined to specify				1
Abbott, James P	333-33-3333		AB31	11/11/1976
White				3
Crosby, Shirley	222-22-2222		CR94	11/11/1972
Winters, Carl	000-00-0000		WI211	11/11/1980
Winters, Barbara	000-00-0001		WI212	11/11/1982

How do I run the UDS - Patient Status Report?

From the DXOne Reporting module, select **UDS**, and then double-click **UDS - Patient Status**. For additional details about running this report, see the “UDS - Patient Status Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).


What important information does this report provide?

The report can be grouped and subtotaled by provider with a breakdown by clinic. Or, the report can be grouped and subtotaled by clinic with a breakdown by provider. The report can also be grouped by county (either before or after the other grouping options) and subtotaled. The following information appears on the report:

- A. Status** – The status (race, language, poverty level, worker status, sexual orientation, homeless status, veteran status, ethnicity, religion, user-defined, housing status, or gender identity) that is being reported on and the total number of patients with that status who have a completed procedure that falls within the date range of the report.
- B. Patient** – The patient’s name, Social Security number, EMR number, Chart number, and birth date. (This information appears only if **Include Patient Info** is selected when setting up options for this report.)
- C. Zip Code Statistics** – The patients that live in each ZIP Code.
- D. County Totals** – The status totals for patients that live in the given county.
- E. Provider Totals** – The status totals for patients of the given provider.
- F. Clinic Totals** – The status totals for patients that visit the given clinic.

UDS - Sealant Statistics Report

The UDS - Sealant Statistics Report displays the percentage of children, ages 6 through 9, who are at a moderate to high risk for caries and who received a sealant on a permanent first molar during the reporting period.

	<p>Why: To generate a record of sealant statistics for UDS reporting for comparison with national data, and to provide sealant statistics to grantees, partners, and communities</p> <p>When: As needed</p>
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Sealants

01/01/2017 - 12/31/2017 Procedure Date
 Birthdate: 01/01/2006 - 12/31/2009
 Sealant Codes: D1351, D1351e, D1353
 Visit Codes: D0110, D0120, D0140, D0150
 Carie Codes: 15105, 15106, 15107
 Sealant Ineligibility Codes: 15101, 15110, D2140, D2150, D2160, D2161, D2330, D2331, D2332, D2335, D2390, D2391, D2392, D2393, D2394, D2740, D2750, D2751, D2752, D2790, D2791, D2792, D2794

Report Date: 1/4/2018 Report Generated By: enterprise Page 1 of 1

PATIENT NAME	CHART #	CLINIC	PROVIDER	BIRTHDATE	SSN	EMR #
Blair, Mark	BL84	AF	DESMITH	11/11/2006		
Crosby, Tom	CR96	CENTRAL	DSMITH	11/11/2006		
Winters, Jillian	WI213	AF	DESMITH	11/11/2007		

(A)

(B)

Charts Sampled:	3
Moderate to High Risk of Caries:	2
Patients Eligible for Exclusion from Moderate to High Risk of Caries:	2
Moderate to High Risk of Caries who Received Sealant on 1st Molar:	2

How do I run the UDS - Sealant Statistics Report?

From the DXOne Reporting module, select UDS, and then double-click UDS - Sealant Statistics. For additional details about running this report, see the "UDS - Sealant Statistics Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the Help menu of any module, click Contents).

What important information does this report provide?

The report can be grouped by Clinic, Provider, and/or ZIP Code. The report includes the following information:

A. Patient – The patient's name, Social Security number, EMR number, Chart number, birth date, assigned clinic, and primary provider. (This information appears only if **Include Patient Info** is selected when setting up options for this report.)

B. Statistics – The report presents the following statistics:

- The total number of 6-9 year old children with a moderate to high risk of caries.
- The total number of 6-9 year old children that were sampled.
- The total number of 6-9 year old children with a moderate to high risk of caries who got sealants on permanent first molars (tooth 3, 14, 19, and 30).
- The total number of 6-9 year old children with a moderate to high risk of caries but who are eligible for exclusion.

Exclusions (for all permanent first molar): the tooth is unerupted, has a restoration, has a sealant already (before the start of the measurement period), or cannot be sealed (due to caries or fracture).

The measure is calculated using the following numerator and denominator:

- **Numerator** – Number of patients, ages 6 through 9, who were at a moderate to high risk for caries and who received a sealant on a permanent first molar tooth during the reporting year.
- **Denominator** – Number of patients, ages 6 through 9, who had an oral assessment, a comprehensive oral evaluation, or a periodic oral evaluation during the reporting year and who have a documented moderate to high risk for caries (for example, if the measurement year is 2015, the report includes patients whose dates of birth are between January 1, 2006 and December 31, 2009, inclusive).

Note: *The clinics and providers for the report are determined by each patient's default provider and clinic (as set up from the Family File).*

UDS - Tobacco Use and Intervention Report

The UDS - Tobacco Use and Intervention Report displays the percentage of patients, ages 18 and older, who received screenings and interventions for cessation of tobacco use during the reporting period.

Why: To generate a record of tobacco cessation counseling statistics for UDS reporting for comparison with national data, and to provide tobacco cessation counseling statistics to grantees, partners, and communities

When: As needed

Tobacco Use and Intervention							
1/30/2017 - 1/30/2017 Procedure Date							
Clinics: <ALL>							
Providers: <ALL>							
Billing Types: <ALL>							
Report Date: 1/30/2017		Report Generated By: enterprise				Page 1 of 1	
PATIENT NAME	BT	SOCIAL SECURITY #	EMR #	CHART #	BIRTHDATE	MEETS NUM	MEETS DEN EXC
A Abbott, James P	1	333-33-3333		AB31	11/11/1976		Y
Crosby, Brent	1	111-11-1111		CR93	11/11/1970	Y	
Crosby, Shirley	1	222-22-2222		CR94	11/11/1972		
GRAND TOTALS							
	B	Patient Population	Denominator	Numerator	Denominator Exception		
		3	3	1	1		

How do I run the UDS - Tobacco Use and Intervention Report?

From the DXOne Reporting module, select **UDS**, and then double-click **UDS - Tobacco Use and Intervention**. For additional details about running this report, see the “UDS - Tobacco Use and Intervention Report” topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The report can be grouped by Clinic, Provider, and/or ZIP Code. The report includes the following information:

- A. Patient (in the Patient Population)** – The patient’s name, billing type, Social Security number, EMR number, Chart number, birth date, assigned clinic, and primary provider. Also indicated are if the patient is in the numerator or if the patient is an exception in the denominator. (This information appears only if **Include Patient Detail** is selected when setting up options for this report.)
- B. Statistics** – The report presents the following statistics:
- **Patient Population and Denominator** – Number of patients, who had at least one visit encounter¹ or, depending on the codes used, at least two visit encounters, and who were 18 years old or older either at the time of the visit or, if there were multiple visits, at the time of the earlier of the two most recent visits.

Denominator Exception: A tobacco use assessment was not done either for a medical reason² or due to a limited life expectancy².
 - **Numerator** – Number of patients, ages 18 and older, who had a tobacco use assessment³ up to 24 months before the end of the reporting period, and who met one of the following criteria:
 - A reported tobacco non-user⁴ up to 24 months before the end of the reporting period, who, afterwards, did not become a tobacco user 24 months or less before the end of the reporting period.
 - A reported tobacco user⁴ up to 24 months before the end of the reporting period, who, afterwards, did not become a tobacco non-user 24 months or less before the end of the reporting period, and who started tobacco cessation counseling⁵ or pharmacotherapy⁶ 24 months or less before the end of the reporting period.


Note: *The clinics and providers for the report are determined by each patient’s default provider and clinic (as set up from the Family File).*

Footnotes:

1. Medical Encounter with an applicable AMA-CPT or SNOMED code (such as 99212 or 12843005).
2. Medical Encounter with an applicable SNOMED code (such as 162607003).
3. Medical Encounter with an applicable LOINC code (such as 68535-4).
4. Medical Encounter with an applicable SNOMED code (such as 105539002).
5. Medical Encounter with an applicable SNOMED code (such as 171055003).
6. Prescription, or prescription order, with an applicable RXNORM code (such as 1046847).

Unscheduled Appointment List (DX1)

The Unscheduled Appointment List displays appointments that have been broken or marked as wait/will call.

	<p>Why: To ensure the practice follows up on broken and wait/will call appointments</p> <p>When: Weekly</p>
---	---

Server Name: <Default>

Unscheduled Appointment List

Date Range: 01/01/2017 - 12/31/2017
Providers: <ALL>

Report Date: 12/19/2018 Report Generated By: DSMITH Page 1 of 1

Date	Status	Patient Name	PROV	Appointment Reason	Length	Phone	Break Reason
11/08/2017	Broken	Smith, Angela	MHAYES	FMIrr	30m	(801) 555-4321	Phone Cancellation
11/08/2017	Broken	Winters, Carl	DESMITH	UnspcAdjP	10m	(801) 555-4444	In-Office Cancellation
11/09/2017	Wait / Will call	Crosby, Brent	DESMITH	PROPHY	40m		
11/22/2017	Broken	Harmon, Karen	MHAYES	Compr Exa, FMX	40m		In-Office Cancellation

Total Listed: 4

How do I run the Unscheduled Appointment List?

From the DXOne Reporting module, select **List**, and then double-click **Unscheduled Appointment List**. For additional details about running this report, see the "Unscheduled Appointment List" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

The unscheduled appointments on the report can be sorted by the date broken or by the break reason. Each clinic's unscheduled appointments can start on a new page.

- A. Appointment details** – For each unscheduled appointment, the report displays the date, status, patient's name, scheduled provider, appointment reason, appointment length, patient's phone number, and break reason.
- B. Date** – The date the appointment was broken or placed on the wait/will call list.
- C. Patient** – The patient's name.
- D. Phone** – The patient's phone number.
- E. Break Reason** – The reason that the appointment was broken (applies only to broken appointments).

Also, the total number of appointments on the report appears.

Unscheduled Appointment List (OM)

The Unscheduled Appointment List displays patients that have broken an appointment and have not re-scheduled. The report includes broken appointments in all clinics.

	<p>Why: To ensure the practice follows up on broken appointments</p> <p>When: Weekly</p>
--	--

UNSCHEDULED APPOINTMENT LIST						
The Dentist Group						
Provider <ALL>						
04/16/2018 - 04/23/2018						
Date: 04/23/2018					Page: 1	
DATE BROKEN	PATIENT NAME	PROV	APPOINTMENT REASON	LENGTH	PHONE	STATUS
04/16/2018	Abbott, James S	DDS1	CompEx	10m	555-1586	W/Call
04/16/2018	Brown, Mary L	DDS2	ExtSingTh#1, ExtSingTh#16, ExtSingTh#17	90m	(919)555-1045	Broken
04/16/2018	Crosby, Brent J	DDS2	CompEx, 2BWx, ImpltCnBr	30m	(919)555-1873	Broken
04/22/2018	Edwards, John S	DDS1	CCAdult, Pano, FabPtCr+B#5	80m	555-1586	Broken
04/23/2018	Perkins, Peggy	DDS1	ProphFIAd	50m	555-1586	Broken
04/23/2018	Reeves, Elisabeth D	DDS2	Pano, EmergEx	40m	(919)555-1978	W/Call
04/23/2018	Winters, Carl	DDS1	CCAdult 60m Broken			
					TOTAL LISTED:	7

How do I run the Unscheduled Appointment List?

In the Office Manager, from the **Reports** menu, point to **Lists**, and then click **Unscheduled Appointment List**. For additional details about running this report, see the “Unscheduled Appointment List” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).



What important information does this report provide?

- A. Date** – The date the appointment was broken or placed on the wait/will call list.
- B. Patient** – The patient’s name.
- C. Phone** – The patient’s phone number.

Also, the total number of appointments on the report appears.

Unscheduled Treatment Plans (Condensed) Report

The Unscheduled Treatment Plans (Condensed) Report displays treatment plans that have been posted to the Ledger but not scheduled in the Appointment Book.

	Why: To ensure the practice follows up on treatment plans
	When: Weekly

UNSCHEDULED TREATMENT PLANS (CONDENSED)			
The Dentist Group			
04/23/2018 - 04/23/2018			
Date: 04/23/2018		Page: 1	
APPT	PATIENT	AMOUNT	PHONE
S U	Abbott, James S	4397.00	(801)555-1586
	Little, Brian R	765.00	(801)555-1234
	Smith, Michael	56.00	(801)555-1586
	Taylor, Mark	484.00	(801)555-7894
U	Winters, Carl	301.00	(801)555-5567
UNSCHEDULED TREATMENT PLANS TOTAL:		6003.00	



How do I run the Unscheduled Treatment Plans (Condensed) Report?

In the Office Manager, from the **Reports** menu, point to **Lists**, and then click **Unscheduled Treatment Plans**. For additional details about running this report, see the “Unscheduled Treatment Plans Report” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Appt



- If a patient has a scheduled appointment for any work other than the treatment plan procedures, an “S” appears on the report.
- If a patient is on the Unscheduled Appointment list, a “U” appears on the report.

B. Treatment Plan Details – The patient, phone number, and treatment plan amount.

C. Report Totals – Combined total for all patients.

Unscheduled Treatment Plans (Detailed) Report

The Unscheduled Treatment Plans (Detailed) Report displays treatment plans that have been posted to the Ledger but not scheduled in the Appointment Book.

	Why: To ensure the practice follows up on treatment plans
	When: Weekly

UNSCHEDULED TREATMENT PLANS						
The Dentist Group						
04/23/2018 - 04/23/2018						
Date: 04/23/2018					Page: 1	
APPT	PATIENT	DATE	TH	PHONE #	DESCRIPTION	AMOUNT
	DENTAL INS. COMPANY			CODE	RENEWAL DATE	BENEFITS REM.
	MEDICAL INS. CO.			RB/RT		
S U	Abbott, James S			(801)555-1586		
		04/23/18	12*	D5213		Maxil partial-metal Base W/sdls 890.00
		04/23/18	19	D6210		Pontic-cast high noble metal 603.00
		04/23/18	20	D6210		Pontic-cast high noble metal 603.00
		04/23/18	21	D6210		Pontic-cast high noble metal 603.00
		04/23/18	22	D6210		Pontic-cast high noble metal 603.00
		04/23/18	7	D6970		Post/core + brdg retainer, fabr 230.00
		04/23/18	23	D6971		Cast post/part of brdg retainer 218.00
		04/23/18	24	D6971		Cast post/part of brdg retainer 218.00
		04/23/18	25	D6971		Cast post/part of brdg retainer 218.00
		04/23/18		D0120		Periodic oral evaluation 25.00
		04/23/18		D1120		Prophylaxis-child 34.00
		04/23/18		D0272		Bitewings-two films 21.00
		04/23/18	UR	D4341	RB	Perio scale&root pln-4+per quad 131.00
	P-Metropolitan Life			Jan		1468.00
	S-Aetna Life and Casualty			Jan		1468.00
	P-Aetna Medical					
					TREATMENT PLAN TOTAL:	4397.00
	Little, Brian			(801)555-0987		
		04/23/18	16	D7140		Extract,erupted th/exposed rt 255.00
		04/23/18	17	D7140		Extract,erupted th/exposed rt 255.00
		04/23/18	32	D7140		Extract,erupted th/exposed rt 255.00
		04/23/18	18	D2393		Resin composite-3s, posterior 0.00
		04/23/18	30	D2393		Resin composite-3s, posterior 0.00
	P-Aetna			Jan		-105.00
	S-Aetna			Jan		-105.00
					TREATMENT PLAN TOTAL:	765.00
	Smith, Michael			(801)555-1586		
		04/23/18		D1204		Fluoride w/o prophylaxis-adult 56.00
	P-Aetna Life and Casualty			Jan		2000.00
					TREATMENT PLAN TOTAL:	56.00
	Taylor, Mark			(801)555-4561		
		04/23/18	32	D7140		Extract,erupted th/exposed rt 152.00
		04/23/18	2	D2160		Amalgam-3 surf. prim/perm 90.00
		04/23/18	3	D2160		Amalgam-3 surf. prim/perm 90.00
		04/23/18	17	D7140		Extract,erupted th/exposed rt 152.00
	P-Met Life			Jan		0.00
					TREATMENT PLAN TOTAL:	484.00
U	Winters, Carl			(801)555-8314		
		04/23/18		D1110		Prophylaxis-adult 78.00
		04/23/18		D0120		Periodic oral evaluation 67.00
		04/23/18		D0274		Bitewings-four films 156.00
	P-Insurance			Jan		0.00
					TREATMENT PLAN TOTAL:	301.00
UNSCHEDULED TREATMENT PLANS TOTAL:						6003.00



How do I run the Unscheduled Treatment Plans (Detailed) Report?

In the Office Manager, from the **Reports** menu, point to **Lists**, and then click **Unscheduled Treatment Plans**. For additional details about running this report, see the “Unscheduled Treatment Plans Report” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Appt

- If a patient has a scheduled appointment for any work other than the treatment plan procedures, an “S” appears on the report.
- If a patient is on the Unscheduled Appointment list, a “U” appears on the report.

B. Treatment Plan Details – The patient, phone number, and treatment plan procedures.

C. Insurance Information – The insurance carrier, renewal month, benefits remaining, and treatment plan total.

D. Report Totals – Combined total for all patients.

Updated Dental Insurance Payment Table Report

The Updated Dental Insurance Payment Table Report allows you to view and print payment tables. Payment tables list the amount an insurance carrier will pay for a procedure.

\$	<p>Why: To ensure payment tables have been set up properly</p> <p>When: After Dentrix Enterprise setup, and as needed</p>
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A

UPDATED INSURANCE PAYMENT TABLE	
The Dentist Group	
Date: 04/22/2018	Page: 1
Blue Cross Blue Shield of FL. P.O. Box 26355 Orlando, FL 84126	GROUP NAME: Dental Claims Group #: 45067
PROCEDURE CODE	PAYMENT AMOUNT
10120	25.00
11111	25.00
15000	0.00
15001	0.00
15002	0.00
15003	0.00
15004	0.00
15005	0.00
15006	0.00
15007	0.00
15008	0.00
15009	0.00
15010	0.00
15011	0.00
15012	0.00
15100	0.00
D0120	25.00
D0120d	25.00
D0120p	15.00
D0120x	25.00
D0140	35.00
D0150	36.00
D0160	38.00
D0210	67.00
D0220	13.00
D0230	10.00
D0240	2512.00
D0250	39.00
D0260	30.00
D0270	15.00
D0272	21.00
D0274	32.00
D0290	81.00
D0310	67.00
D0320	250.00
D0321	125.00
D0322	112.00
D0330	58.00
D0340	81.00
D0415	60.00
D0425	53.00
D0460	40.00
D0470	53.00
D0471	41.00
D0501	123.00
D0502	135.00
D0999	75.00
D1120	34.00
D1201	50.00
D1203	21.00
D1204	21.00
D1205	64.00

B

How do I run the Updated Dental Insurance Payment Table Report?

In the Office Manager, from the **Reports** menu, point to **Reference**, and then click **Ins Pmt Table**. For additional details about running this report, see the “Updated Dental Insurance Payment Table Report” topic in the Office Manager portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

A. Insurance Carrier Details – The name, mailing address, group name, and group number of the insurance carrier. This information is found in the **Dental Insurance Plan Information** dialog box, which can be accessed in the Office Manager.

The screenshot shows the 'Dental Insurance Plan Information' dialog box. A circled 'A' points to the 'Carrier Name' field, which contains 'Aetna Life and Casualty'. Other fields include 'Group Plan' (Aetna), 'Employer' (Acme Inc.), 'Street Address' (P.O. Box 12345), 'City, ST Zip' (San Francisco, CA, 94120), 'Phone' (800/555-6003), 'Group #' (1234-0000), 'Last Update' (01/17/2018), 'Benefit Renewal' (JAN), 'Claim Format' (DX-2012), 'Fee Schedule' (<NONE>), 'RVU Schedule' (<NONE>), 'Payer ID' (12345), 'Source of Payment' (Commercial Insurance Co.), and 'Insurance Claim Options' (Diagnostic Code System: Unspecified, Replace initial character of procedure code with: D, Do Not Include Group Plan Name, Do Not Bill to Dental Insurance, Do Not Bill to Dental Insurance if 0% Coverage).

B. Payment Amount – The total amount the insurance carrier will pay for a procedure. The payment amount is found in the **Edit Updated Insurance Payment Table** dialog box, which can be accessed in the Office Manager. For details about how to edit an insurance carrier’s payment table, see the “Working with payment tables” topic in the Family File portion of the Dentrix Enterprise Help.

The screenshot shows the 'Edit Updated Insurance Payment Table' dialog box. A circled 'B' points to the 'Amount' column. The table lists procedures and their amounts:

Code	Description	Amount
15000	Drifting - Mesial	0.00
D 7941	Osteotomy-mandibular rami	4800.00
D 7942	Osteotomy-ramus, open	7200.00
D 7943	Osteotomy-mand rami w/ gr	6400.00
D 7944	Osteotomy-segmented/subap	8000.00
D 7945	Osteotomy-body of mandibl	5600.00
D 7946	LeFort I (maxilla-total)	7025.00
D 7947	LeFort I (maxilla-segment	8200.00
D 7948	LeFort II/III-no bone gra	8250.00

Buttons: Add, Change, Delete, Delete All, Copy Fee Schedule, OK, Cancel.

Utilization Report

The Utilization Report lists insurance carriers, and for each carrier, the procedures posted during a selected date range.

\$	<p>Why: To identify insurance carriers with low coverages (this is done by comparing the charges posted to the Ledger with the practice's UCR fee schedule)</p> <p>When: Yearly, and as needed</p>
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UTILIZATION REPORT - DENTAL												
Date Range: 05/01/2018 - 05/05/2018 Procedure Date FEE: 001: Office Compare FEE Schedule With: Transaction Amount Include: All Procedures Clinic(s): <ALL> Provider(s): <ALL> Billing Type(s): <ALL> ADA Code(s): <ALL> Carrier From: Aetna Life and Casualty - Aetna - 321863 Carrier To: Aetna Life and Casualty - Aetna - 321863												
Report Date: 05/05/2018				Report Generated By: enterprise				Page 1 of 1				
INSURANCE CARRIER NAME		GROUP PLAN				GROUP NUMBER		PHONE				
SUBSCRIBER	DATE	ID #	PATIENT NAME	BIRTHDATE	SS #	CODE	DESCRIPTION	TH SURFACE	PROVIDER	CLINIC	FEE	CO-PAY
Aetna Life and Casualty												
						Aetna	321863		(800) 555-6444			
Abbott, Patricia	05/01/2018	5678910	Abbott, James S	11/11/1962	000-00-0000	D5214	Mand partial-metal base w/sds	12	DDS2	CENTRAL	801.00	801.00
Abbott, Patricia	05/01/2018	5678910	Abbott, James S	11/11/1962	000-00-0000	D7111	Extraction cml remnts-decid th	13	DDS2	CENTRAL	501.00	501.00
Abbott, Patricia	05/05/2018	5678910	Abbott, James S	11/11/1962	000-00-0000	D5214	Mand partial-metal base w/sds	12	DDS2	CENTRAL	801.00	801.00
Perkins, Peggy	05/01/2018	000-00-0000	Perkins, Shelly	11/11/1980	000-000-0000	D5214	Mand partial-metal base w/sds	15	DDS3	CENTRAL	801.00	801.00
Perkins, Peggy	05/01/2018	000-00-0000	Perkins, Shelly	11/11/1980	000-00-0000	D7111	Extraction cml remnts-decid th	9	DDS3	CENTRAL	501.00	501.00
Perkins, Peggy	05/05/2018	000-00-0000	Perkins, Peggy	11/11/1957	000-00-0000	D6240	Pontic-porcelain fused to hnob	10	DDS1	CENTRAL	620.00	200.00
Perkins, Peggy	05/05/2018	000-00-0000	Perkins, Peggy	11/11/1957	000-00-0000	D6240	Pontic-porcelain fused to hnob	11	DDS1	CENTRAL	620.00	200.00
Perkins, Peggy	05/05/2018	000-00-0000	Perkins, Peggy	11/11/1957	000-00-0000	D66750	Retainer crn-porc fused-hi nob	12	DDS1	CENTRAL	613.00	200.00
Perkins, Peggy	05/05/2018	000-00-0000	Perkins, Peggy	11/11/1957	000-00-0000	D6750	Retainer crn-porc fused-hi nob	9	DDS1	CENTRAL	613.00	200.00
Smith, Michael	05/01/2018	000-00-0000	Smith, Michael	11/11/1970	000-00-0000	D5214	Mand partial-metal base w/sds	12	DDS3	CENTRAL	801.00	801.00
Smith, Michael	05/01/2018	000-00-0000	Smith, Michael	11/11/1970	000-00-0000	D7111	Extraction cml remnts-decid th	7	DDS3	CENTRAL	501.00	501.00
Aetna Life and Casualty Totals:		Fee:	CoPay:	(Fee - CoPay):		Total Office Visits:		Total Patients Seen:				
		7,173.00	5,507.00	1,666.00		5		4				
D												
Grand Totals:		Fee:	Co-Pay:	(Fee - CoPay):		Total Office Visits:		Total Patients Seen:				
		7,173.00	5,507.00	1,666.00		5		4				

How do I run the Utilization Report?

From the DXOne Reporting module, select **Ledger**, and then double-click **Utilization**. For additional details about running this report, see the "Utilization Report" topic in the DXOne Reporting portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Insurance Carriers** – The report is divided by insurance carriers. The carrier's name, group plan name and number, and phone number are shown:
- B. Procedures** – The procedures posted in the Ledger for patients with the displayed insurance carrier. (The procedures will show only if **Insurance Plan Totals Only** is cleared when setting up options for this report.) For each procedure, the following are shown:
- **Fee** – The fee that would have been attached to a procedure had the fee from the fee schedule you selected (when setting up the report options) been used.
 - **Copay** – The fee attached to the procedure posted in the Ledger.
- C. Insurance Carrier Totals** – The total fees, co-pays, (Fee - Co-pay), office visits, and patients seen appear for each insurance carrier. The following is an explanation of the insurance carrier's Fee and CoPay totals:
- **Fee** – The fee that would have been attached to a procedure, had the fee from the fee schedule you selected (when setting up the report options) been used.
 - **CoPay** – The fee attached to the procedure posted in the Ledger.
- D. Grand Totals** – The Grand Totals section displays the following information:
- **Fee** – The total fees that would have been attached to a procedures, had the fee from the fee schedule you selected (when setting up the report options) been used.
 - **Co-Pay** – The total fees attached to the procedures posted in the Ledger.
 - **(Fee - CoPay)** – The total revenue that would have been gained or lost, had the fee schedule you selected (when setting up the report options) been used when posting the procedures. A positive number indicates the practice would have gained revenue. A negative number indicates the practice would have lost revenue.
 - **Total Office Visits** – The total number of office visits (multiple procedures performed on a patient on the same date count as one office visit).
 - **Total Patients Seen** – The total number of patients that appear on the report.

Walkout - Doctor's Statement

The Walkout (Doctor's Statement) itemizes today's charges for an individual patient. This statement includes insurance information, billing details, and a line for the provider's signature.

Why: To provide a patient with the information required to submit his/her insurance claim

When: At patient check-out, and as needed

ATTENDING DOCTOR'S STATEMENT						
						DATE: 05/15/2018
PATIENT INFORMATION			PROVIDER INFORMATION (A)			
PATIENT NAME: Peggy Perkins 123 Street Philadelphia, PA 19102 BIRTHDAY: 11/11/1987 (22) SOC. SEC. NUMBER: 000-00-0000 CHART NUMBER: PA0007 RELATION TO SUBSCRIBER: Other			NAME OF DENTIST: Dennis Smith, DDS The Allied Dentist Group 123 East Valley Dr American Fork, UT 84003 (801)555-9300 SOC. SEC. OR T.I.N. NUMBER: 000-00-0000 LICENSE NUMBER:			
INSURANCE INFORMATION (B)			Remarks for unusual services:			
CARRIER: Aetna Life and Casualty GROUP NUMBER: 321863 EMPLOYER: SUBSCRIBER: Mildred Payne 123 Street Philadelphia, PA 19102 <small>Subscriber ID: 000-00-0000 Subscriber Birthday: 11/11/1957</small>						
DATE	TOOTH	SURF.	CODE	PROCEDURE	CHARGE	
05/15/2018	4		D2761	Crown Insert	0.00	
05/15/2018	5		D2954	Prefab post&core in add to crn	175.00	
05/15/2018	6		D2752	Crown-porc fused noble metal	590.00	
Do not eat or drink for one hour.						
					TOTAL:	765.00
Signature On File _____ SIGNED (TREATING DENTIST)						05/15/2018 DATE

(D)

(C)

How do I run the Walkout - Doctor's Statement?

In the Ledger, from the **Print** menu, click **Walkout**; select **Walkout/Doctor's Statement**; and then click **Print**. For additional details about running this report, see the "Walkout statements" topic in the Ledger portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Provider Information** – The provider details required to submit an insurance claim.
- B. Patient Insurance Information** – The patient's insurance details.
- C. Services Rendered** – The itemized charges for the current day.
- D. Doctor Recommendations** – If you select **Print Doctor Recommendations** when setting options for this report, doctor recommendations appear on the walkout. See the "Adding and editing ADA-CDT dental codes" topic in the Office Manager portion of the Dentrix Enterprise Help for details on how to set up doctor recommendations for a procedure code.

Walkout - Family Walkout

The Family Walkout itemizes today's charges and payments for a family. The Family Walkout functions as a receipt and can include home care instructions and future appointment dates.

Why: To provide patients with a record of services rendered, and to provide patients with home care instructions

When: At patient check-out

STATEMENT OF SERVICES RENDERED

The Allied Dentist Group
123 East Valley Dr
American Fork, UT 84003

(801)555-9300

CHART NO.	PAGE NO.
	1

BILLING DATE
05/15/2018

GUARANTOR NAME AND MAILING ADDRESS	
Peggy Perkins 123 Street Philadelphia, PA 19102	

PATIENT	TOOTH	SURF	DESCRIPTION	CHARGE	CREDIT
Shelly	4		Crown Insert	0.00	
Shelly	5		Prefab post&core in add to crn	175.00	
Shelly	6		Crown-porc fused noble metal	590.00	
Do not eat or drink for one hour.					

PRIOR BALANCE	CURRENT CREDITS	CURRENT CHARGES	NEW BALANCE	INSURANCE ESTIMATE	PLEASE PAY
11322.00	0.00	765.00	12087.00	800.00	11287.00

YTD Finance Charges: 100.00 YTD Late Charges: 7840.00 YTD Guar Payments: 120.00 YTD Ins Payments: 0.00

PATIENT	DATE	TIME	REASON
Shelly	Tuesday - June 2, 2018	9:20 am	Res2PosPm#4

Thanks for coming in!

How do I run the Walkout - Family Walkout?

In the Ledger, from the **Print** menu, click **Walkout**; select **Family Walkout**; and then click **Print**. For additional details about running this report, see the "Walkout statements" topic in the Ledger portion of the Dentrix Enterprise Help (from the **Help** menu of any module, click **Contents**).

What important information does this report provide?

- A. Services Rendered and Payments Received** – The services and payments made by each family member on the current day.
- B. Doctor Recommendations** – If you select **Print Doctor Recommendations** when setting options for this report, doctor recommendations notes appear on the walkout. See the "Adding and editing ADA-CDT dental codes" topic in the Office Manager portion of the Dentrix Enterprise Help for details on how to set up doctor recommendations for a procedure code.
- C. Account Balance Details** – The guarantor's prior balance, total payments today, total charges today, and current balance.
- D. Dental Insurance Estimate** – The estimated portion of charges (for procedures attached to claims or not) that are covered by the patients' insurance (for procedures that are not attached to claims, the estimated insurance portion is based on the corresponding patient's primary insurance).
- E. Year-to-date Financial Details** – If you select **Print YTD Finance Charges, Late Charges, and Payments** when setting options for this report, the guarantor's year-to-date totals appear on the report.
- F. Next Appointments** – The next scheduled appointment for each family member.
- G. Walkout Message** – The custom message entered when setting options for this report. You can only add custom messages to the Family Walkout by running the walkout from the Ledger menu bar.

Indices

Index by Report Name

- Adjustment Summary Report, 4
- Aging/Credit Balance Report, 6
- Analysis Summary Report - Daily, 8
- Analysis Summary Report - Standard, 12
- Appointment Book View Printout, 14
- Appointment Cycle Time Report, 16
- Appointment Reminder Cards, 18
- Appointment Statistics Report, 20
- As Soon As Possible List, 22
- Assigned Rights Report, 24
- Audit Report - Appointments, 26
- Audit Report - Audit Log Status, 28
- Audit Report - Clinics, 30
- Audit Report - Combined, 32
- Audit Report - Patients, 34
- Audit Report - Providers/Staff, 36
- Audit Report - Transactions, 38
- Audit Rights Report - Assigned Individually, 40
- Audit Rights Report - Assigned to Groups, 42
- Audit Rights Report - Group Names, 44
- Audit Rights Report - Users to Groups, 46
- Billing Statement, 48
- Birthday List, 50
- Caries Prevalence and Periodontal Index Report, 52
- Clinical Notes Report, 64
- Clinical Quality Measures List, 66
- Collections Manager List, 70
- Continuing Care Cards - No Appointment, 74
- Continuing Care Cards - with Appointment, 75
- Continuing Care Display List, 76
- Coupon Book - Future Due Payments, 78
- Coupon Book - Payment Agreements, 79
- Credit Card Transaction Report, 80
- Custom Practice Information Report, 82
- Daily Appointment List (DX1), 84
- Daily Appointment List Report, 86
- Daily Summary Report, 88
- Day Sheet (Adjustments) Report, 90
- Day Sheet (Charges and Receipts) Report, 94
- Day Sheet (Receipts) Report, 98
- Day Sheet Report, 100
- Dental Diagnostic Code List, 104
- Dental Encounters Report, 106
- Deposit Slip, 108
- Document Center Document, 112
- Document Center List, 114
- Employers and Employed Patients Report, 116
- Family Ledger Report, 118
- Family Ledger Report (Single Family), 120
- Fee Schedules Report, 122
- Finance Charge Report, 124
- Future Due Payment Plan Report - Monthly Totals, 126
- Future Due Payment Plan Report - Standard, 128
- Initial Health History Report, 130
- Insurance Carrier List, 132
- Insurance Carrier Production - Full Report, 136
- Insurance Carrier Production - Summary Report, 138
- Insurance Claim Aging Report, 140
- Insurance Claims Not Sent Report, 142
- Insurance Coverage Tables Report, 144
- Insurance Eligibility Report, 146
- Insurance Transaction Analysis Report, 148
- Late Charge Report, 150
- Letter Merge Reports, 152
- Meaningful Use Measure Calculation List, 156
- Medical Code List, 180
- Multi-Code List, 182
- New Patient List, 184
- Office Journal Report, 186
- Operator Day Sheet Report, 188
- Operatory Appointment List Report, 190
- Oral Health Education Report, 192
- Patient Chart and Progress Notes Printout, 194
- Patient Chart Printout, 196
- Patient Health Assessment Report, 198
- Patient Information Accessed Report, 200
- Patient Ledger Report, 202
- Patient List, 204
- Patient List (Filtered), 206
- Patient Notes Report, 208
- Patient Proposed Treatment Case Report (Your Care Plan), 212
- Patient Questionnaire, 214
- Patient Route Slip, 216
- Patient Treatment Case Report, 218
- Patient's Ledger Report, 220
- Payment Agreement Amortization Schedule, 222
- Payment Agreement Report, 224
- Payment Summary Report, 226
- Perio - Combined Graphic & Data Chart Report, 228
- Perio - Data Chart Report, 230
- Perio - Exam Comparison Report, 232
- Perio - Graphic Chart Report, 234
- Perio - Pocket Depths Only Report, 236
- Perio Exam List, 238
- Periodontal Exam Report, 240
- Practice Analysis Report, 242
- Practice Organization List, 244
- Practice Statistics Report, 246
- Practice Treatment Case Report, 248
- Prescription Printout, 250
- Pre-Treatment Estimate Aging Report, 252
- Pre-Treatment Estimates Not Sent Report, 254
- Procedure Code List, 256
- Procedures Not Attached to Insurance Report, 258
- Production Summary Report, 260
- Provider A/R Totals - Daily Report, 264
- Provider A/R Totals - Standard Report, 266
- Provider IDs List, 272
- Provider Revenue - Allocations Report, 274
- Provider Revenue - Charges Report, 276
- Provider Revenue - Credits Report, 278
- Provider Revenue - Summary Report, 280
- Referral Analysis Report, 282

Referral Recap Report, 284
Referral Slip, 286
Referred By Doctor/Other Report, 288
Referred By Patient Report, 290
Referred To Doctor Report, 292
Registration Information Report, 294
RVU Day Sheet Report, 296
RVU Production Summary Report, 298
RVU Schedules Report, 302
RVU Utilization Report, 304
Secondary Insurance Claims Not Created Report, 306
Secondary Pre-Treatment Estimates Not Created Report, 308
Standard Coverage Tables Report, 310
Suspended Credits Report, 312
Treatment Case Report, 314
Treatment Plan Approval Report, 316
Treatment Plan Approval Status Report, 318
Truth in Lending Disclosure Statement, 320
UDS - Age/Gender Report, 322
UDS - Encounters and Users by Selected Procedure Codes Report, 326
UDS - Encounters by Provider Report, 328
UDS - Insurance Financial Class Report, 330
UDS - Insurance Financial Class Report (2013), 332
UDS - Medicaid/Medicare Report, 334
UDS - Patient Related Revenue Report, 336
UDS - Patient Status Report, 338
UDS - Sealant Statistics Report, 340
UDS - Tobacco Use and Intervention Report, 342
Unscheduled Appointment List (DX1), 344
Unscheduled Appointment List (OM), 346
Unscheduled Treatment Plans (Condensed) Report, 348
Unscheduled Treatment Plans (Detailed) Report, 350
Updated Dental Insurance Payment Table Report, 352
Utilization Report, 354
Walkout - Doctor's Statement, 356
Walkout - Family Walkout, 358
Index by Symbol, 364
Index by When to Run a Report, 366
Index by Module, 368
Index of Filters by Report, 370
Index by Filter, 380
Index by Report Item, 391

Index by Symbol



Patient Care

Appointment Cycle Time Report, 16
 As Soon As Possible List, 22
 Birthday List, 50
 Caries Prevalence and Periodontal Index Report, 52
 Continuing Care Cards - No Appointment, 74
 Continuing Care Cards - with Appointment, 75
 Daily Appointment List (DX1), 84
 Daily Appointment List Report, 86
 Initial Health History Report, 130
 Letter Merge Reports, 152
 Operatory Appointment List Report, 190
 Patient Chart and Progress Notes Printout, 194
 Patient Chart Printout, 196
 Patient Proposed Treatment Case Report (Your Care Plan), 212
 Patient Route Slip, 216
 Patient Treatment Case Report, 218
 Payment Agreement Amortization Schedule, 222
 Perio - Combined Graphic & Data Chart Report, 228
 Perio - Data Chart Report, 230
 Perio - Exam Comparison Report, 232
 Perio - Graphic Chart Report, 234
 Perio - Pocket Depths Only Report, 236
 Practice Treatment Case Report, 248
 Referral Recap Report, 284
 Treatment Case Report, 314
 Truth in Lending Disclosure Statement, 320
 Walkout - Doctor's Statement, 356
 Walkout - Family Walkout, 358



Information

Appointment Book View Printout, 14
 Assigned Rights Report, 24
 Audit Report - Appointments, 26
 Audit Report - Audit Log Status, 28
 Audit Report - Clinics, 30
 Audit Report - Combined, 32
 Audit Report - Patients, 34
 Audit Report - Providers/Staff, 36
 Audit Report - Transactions, 38
 Audit Rights Report - Assigned Individually, 40
 Audit Rights Report - Assigned to Groups, 42
 Audit Rights Report - Group Names, 44
 Audit Rights Report - Users to Groups, 46
 Caries Prevalence and Periodontal Index Report, 52
 Clinical Notes Report, 64
 Clinical Quality Measures List, 66
 Continuing Care Display List, 76
 Credit Card Transaction Report, 80
 Credit Card Transaction Report, 80
 Daily Summary Report, 88

Dental Diagnostic Code List, 104
 Dental Encounters Report, 106
 Dental Encounters Report, 106
 Document Center Document, 112
 Document Center List, 114
 Employers and Employed Patients Report, 116
 Fee Schedules Report, 122
 Insurance Carrier List, 132
 Insurance Eligibility Report, 146
 Letter Merge Reports, 152
 Meaningful Use Measure Calculation List, 156
 Medical Code List, 180
 Multi-Code List, 182
 Office Journal Report, 186
 Oral Health Education Report, 192
 Patient Chart and Progress Notes Printout, 194
 Patient Chart Printout, 196
 Patient Health Assessment Report, 198
 Patient Information Accessed Report, 200
 Patient List (Filtered), 206
 Patient Notes Report, 208
 Patient Questionnaire, 214
 Perio Exam List, 238
 Periodontal Exam Report, 240
 Practice Organization List, 244
 Practice Statistics Report, 246
 Pre-Treatment Estimate Aging Report, 252
 Procedure Code List, 256
 Provider IDs List, 272
 Registration Information Report, 294
 RVU Schedules Report, 302
 UDS - Age/Gender Report, 322
 UDS - Encounters and Users by Selected Procedure Codes Report, 326
 UDS - Encounters by Provider Report, 328
 UDS - Insurance Financial Class Report, 330
 UDS - Insurance Financial Class Report (2013), 332
 UDS - Medicaid/Medicare Report, 334
 UDS - Patient Related Revenue Report, 336
 UDS - Patient Status Report, 338
 UDS - Sealant Statistics Report, 340
 UDS - Tobacco Use and Intervention Report, 342



Financial

Adjustment Summary Report, 4
 Aging/Credit Balance Report, 6
 Analysis Summary Report - Daily, 8
 Analysis Summary Report - Standard, 12
 Billing Statement, 48
 Clinical Quality Measures List, 66
 Collections Manager List, 70
 Coupon Book - Future Due Payments, 78
 Coupon Book - Payment Agreements, 79
 Credit Card Transaction Report, 80
 Daily Summary Report, 88

Day Sheet (Adjustments) Report, 90
 Day Sheet (Charges and Receipts) Report, 94
 Day Sheet (Receipts) Report, 98
 Day Sheet Report, 100
 Deposit Slip, 108
 Family Ledger Report, 118
 Family Ledger Report (Single Family), 120
 Fee Schedules Report, 122
 Finance Charge Report, 124
 Future Due Payment Plan Report - Monthly Totals, 126
 Future Due Payment Plan Report - Standard, 128
 Insurance Claim Aging Report, 140
 Insurance Claims Not Sent Report, 142
 Insurance Coverage Tables Report, 144
 Insurance Eligibility Report, 146
 Insurance Transaction Analysis Report, 148
 Late Charge Report, 150
 Letter Merge Reports, 152
 Meaningful Use Measure Calculation List, 156
 Operator Day Sheet Report, 188
 Patient Ledger Report, 202
 Patient Proposed Treatment Case Report (Your Care Plan), 212
 Patient Route Slip, 216
 Patient Treatment Case Report, 218
 Patient's Ledger Report, 220
 Payment Agreement Report, 224
 Payment Summary Report, 226
 Practice Analysis Report, 242
 Practice Treatment Case Report, 248
 Pre-Treatment Estimates Not Sent Report, 254
 Procedures Not Attached to Insurance Report, 258
 Provider A/R Totals - Daily Report, 264
 Provider A/R Totals - Standard Report, 266
 Provider Revenue - Allocations Report, 274
 Provider Revenue - Charges Report, 276
 Provider Revenue - Credits Report, 278
 Provider Revenue - Summary Report, 280
 Referred By Doctor/Other Report, 288
 Referred By Patient Report, 290
 RVU Day Sheet Report, 296
 RVU Production Summary Report, 298
 RVU Schedules Report, 302
 RVU Utilization Report, 304
 Secondary Insurance Claims Not Created Report, 306
 Secondary Pre-Treatment Estimates Not Created Report, 308
 Standard Coverage Tables Report, 310
 Suspended Credits Report, 312
 Treatment Case Report, 314
 Truth in Lending Disclosure Statement, 320
 Unscheduled Treatment Plans (Condensed) Report, 348
 Unscheduled Treatment Plans (Detailed) Report, 350
 Updated Dental Insurance Payment Table Report, 352
 Utilization Report, 354
 Appointment Statistics Report, 20
 As Soon As Possible List, 22
 Continuing Care Cards - No Appointment, 74
 Continuing Care Cards - with Appointment, 75
 Daily Appointment List (DX1), 84
 Daily Appointment List Report, 86
 Daily Summary Report, 88
 Day Sheet (Charges and Receipts) Report, 94
 Dental Encounters Report, 106
 Insurance Carrier Production - Full Report, 136
 Insurance Carrier Production - Summary Report, 138
 Letter Merge Reports, 152
 New Patient List, 184
 Patient List, 204
 Production Summary Report, 260
 Referral Analysis Report, 282
 Referred By Doctor/Other Report, 288
 Referred By Patient Report, 290
 Referred To Doctor Report, 292
 RVU Day Sheet Report, 296
 RVU Production Summary Report, 298
 RVU Utilization Report, 304
 Treatment Plan Approval Report, 316
 Treatment Plan Approval Status Report, 318
 Unscheduled Appointment List (DX1), 344
 Unscheduled Appointment List (OM), 346
 Unscheduled Treatment Plans (Condensed) Report, 348
 Unscheduled Treatment Plans (Detailed) Report, 350



Time

Appointment Cycle Time Report, 16
 Appointment Statistics Report, 20
 Continuing Care Cards - No Appointment, 74
 Continuing Care Cards - with Appointment, 75
 Deposit Slip, 108
 Letter Merge Reports, 152
 Prescription Printout, 250
 Referral Slip, 286



Production

Analysis Summary Report - Daily, 8
 Analysis Summary Report - Standard, 12
 Appointment Reminder Cards, 18

Index by When to Run a Report

Daily

Appointment Book View Printout, 14
 Appointment Cycle Time Report, 16
 As Soon As Possible List, 22
 Credit Card Transaction Report, 80
 Daily Appointment List (DX1), 84
 Daily Appointment List Report, 86
 Daily Summary Report, 88
 Day Sheet (Adjustments) Report, 90
 Day Sheet (Charges and Receipts) Report, 94
 Day Sheet (Receipts) Report, 98
 Day Sheet Report, 100
 Deposit Slip, 108
 Insurance Claims Not Sent Report, 142
 Insurance Eligibility Report, 146
 Operator Day Sheet Report, 188
 Operatory Appointment List Report, 190
 Patient Route Slip, 216
 Pre-Treatment Estimates Not Sent Report, 254
 Procedures Not Attached to Insurance Report, 258
 Production Summary Report, 260
 Provider Revenue - Allocations Report, 274
 Provider Revenue - Charges Report, 276
 Provider Revenue - Credits Report, 278
 Provider Revenue - Summary Report, 280
 RVU Day Sheet Report, 296
 RVU Production Summary Report, 298
 Secondary Insurance Claims Not Created Report, 306
 Secondary Pre-Treatment Estimates Not Created Report, 308

Weekly

As Soon As Possible List, 22
 Insurance Claims Not Sent Report, 142
 Pre-Treatment Estimates Not Sent Report, 254
 Provider A/R Totals - Standard Report, 266
 Referral Recap Report, 284
 Secondary Insurance Claims Not Created Report, 306
 Secondary Pre-Treatment Estimates Not Created Report, 308
 Treatment Plan Approval Report, 316
 Treatment Plan Approval Status Report, 318
 Unscheduled Appointment List (DX1), 344
 Unscheduled Appointment List (OM), 346
 Unscheduled Treatment Plans (Condensed) Report, 348
 Unscheduled Treatment Plans (Detailed) Report, 350

Monthly

Aging/Credit Balance Report, 6
 Analysis Summary Report - Daily, 8
 Analysis Summary Report - Standard, 12
 Appointment Reminder Cards, 18
 Audit Report - Appointments, 26
 Audit Report - Audit Log Status, 28
 Audit Report - Clinics, 30
 Audit Report - Combined, 32
 Audit Report - Patients, 34
 Audit Report - Providers/Staff, 36
 Audit Report - Transactions, 38

Audit Rights Report - Assigned Individually, 40
 Audit Rights Report - Assigned to Groups, 42
 Audit Rights Report - Group Names, 44
 Audit Rights Report - Users to Groups, 46
 Billing Statement, 48
 Collections Manager List, 70
 Continuing Care Cards - No Appointment, 74
 Continuing Care Cards - with Appointment, 75
 Continuing Care Display List, 76
 Finance Charge Report, 124
 Future Due Payment Plan Report - Monthly Totals, 126
 Future Due Payment Plan Report - Standard, 128
 Insurance Carrier Production - Full Report, 136
 Insurance Carrier Production - Summary Report, 138
 Insurance Claim Aging Report, 140
 Late Charge Report, 150
 New Patient List, 184
 Patient Information Accessed Report, 200
 Provider A/R Totals - Standard Report, 266
 Referral Recap Report, 284
 Suspended Credits Report, 312

Quarterly

Adjustment Summary Report, 4
 Caries Prevalence and Periodontal Index Report, 52
 Insurance Carrier Production - Full Report, 136
 Insurance Carrier Production - Summary Report, 138

Yearly

Adjustment Summary Report, 4
 Initial Health History Report, 130
 New Patient List, 184
 Oral Health Education Report, 192
 Periodontal Exam Report, 240
 Production Summary Report, 260
 Provider A/R Totals - Standard Report, 266
 RVU Utilization Report, 304
 Utilization Report, 354

As Needed

Appointment Book View Printout, 14
 Appointment Reminder Cards, 18
 Appointment Statistics Report, 20
 Assigned Rights Report, 24
 Audit Report - Appointments, 26
 Audit Report - Audit Log Status, 28
 Audit Report - Clinics, 30
 Audit Report - Combined, 32
 Audit Report - Patients, 34
 Audit Report - Providers/Staff, 36
 Audit Report - Transactions, 38
 Audit Rights Report - Assigned Individually, 40
 Audit Rights Report - Assigned to Groups, 42
 Audit Rights Report - Group Names, 44
 Audit Rights Report - Users to Groups, 46
 Birthday List, 50
 Clinical Notes Report, 64
 Clinical Quality Measures List, 66
 Continuing Care Display List, 76
 Coupon Book - Future Due Payments, 78

Coupon Book - Payment Agreements, 79
 Credit Card Transaction Report, 80
 Custom Practice Information Report, 82
 Dental Diagnostic Code List, 104
 Dental Encounters Report, 106
 Document Center Document, 112
 Document Center List, 114
 Employers and Employed Patients Report, 116
 Family Ledger Report, 118
 Family Ledger Report (Single Family), 120
 Fee Schedules Report, 122
 Insurance Carrier List, 132
 Insurance Coverage Tables Report, 144
 Insurance Transaction Analysis Report, 148
 Letter Merge Reports, 152
 Meaningful Use Measure Calculation List, 156
 Medical Code List, 180
 Multi-Code List, 182
 Office Journal Report, 186
 Patient Chart and Progress Notes Printout, 194
 Patient Chart Printout, 196
 Patient Health Assessment Report, 198
 Patient Information Accessed Report, 200
 Patient Ledger Report, 202
 Patient List, 204
 Patient List (Filtered), 206
 Patient Notes Report, 208
 Patient Proposed Treatment Case Report (Your Care Plan), 212
 Patient Route Slip, 216
 Patient Treatment Case Report, 218
 Patient's Ledger Report, 220
 Payment Agreement Amortization Schedule, 222
 Payment Summary Report, 226
 Perio - Combined Graphic & Data Chart Report, 228
 Perio - Data Chart Report, 230
 Perio - Exam Comparison Report, 232
 Perio - Graphic Chart Report, 234
 Perio - Pocket Depths Only Report, 236
 Perio Exam List, 238
 Practice Analysis Report, 242
 Practice Organization List, 244
 Practice Statistics Report, 246
 Practice Treatment Case Report, 248
 Prescription Printout, 250
 Pre-Treatment Estimate Aging Report, 252
 Provider A/R Totals - Daily Report, 264
 Provider IDs List, 272
 Referral Analysis Report, 282
 Referred By Doctor/Other Report, 288
 Referred By Patient Report, 290
 Referred To Doctor Report, 292
 Registration Information Report, 294
 RVU Schedules Report, 302
 RVU Utilization Report, 304
 Standard Coverage Tables Report, 310
 Treatment Case Report, 314
 Truth in Lending Disclosure Statement, 320
 UDS - Age/Gender Report, 322
 UDS - Encounters and Users by Selected Procedure Codes Report, 326
 UDS - Encounters by Provider Report, 328

UDS - Insurance Financial Class Report, 330
 UDS - Insurance Financial Class Report (2013), 332
 UDS - Medicaid/Medicare Report, 334
 UDS - Patient Related Revenue Report, 336
 UDS - Patient Status Report, 338
 UDS - Sealant Statistics Report, 340
 UDS - Tobacco Use and Intervention Report, 342
 Updated Dental Insurance Payment Table Report, 352
 Utilization Report, 354
 Walkout - Doctor's Statement, 356

After ADA Codes are Updated

Procedure Code List, 256

After Creating a Payment Agreement

Coupon Book - Payment Agreements, 79
 Payment Agreement Amortization Schedule, 222
 Truth in Lending Disclosure Statement, 320

After Creating a Future Due Payment Plan

Coupon Book - Future Due Payments, 78

After Dentrax Enterprise Setup

Assigned Rights Report, 24
 Custom Practice Information Report, 82
 Dental Diagnostic Code List, 104
 Fee Schedules Report, 122
 Insurance Carrier List, 132
 Insurance Coverage Tables Report, 144
 Medical Code List, 180
 Multi-Code List, 182
 Procedure Code List, 256
 Provider IDs List, 272
 RVU Schedules Report, 302
 Updated Dental Insurance Payment Table Report, 352

After Entering a Referral

Referral Slip, 286

After Performing a Perio Exam

Perio - Combined Graphic & Data Chart Report, 228
 Perio - Data Chart Report, 230
 Perio - Exam Comparison Report, 232
 Perio - Graphic Chart Report, 234
 Perio - Pocket Depths Only Report, 236

As Frequently as Payments Are Required

Payment Agreement Report, 224

At Patient Check-Out

Referral Slip, 286
 Walkout - Doctor's Statement, 356
 Walkout - Family Walkout, 358

At the Beginning of Each Budgeting Cycle

Future Due Payment Plan Report - Monthly Totals, 126
 Future Due Payment Plan Report - Standard, 128
 Production Summary Report, 260

Before Month-End Close Out

Practice Analysis Report, 242

Semi-Monthly

Appointment Reminder Cards, 18
 Billing Statement, 48

At Patient Check-In

Patient Questionnaire, 214

Index by Module

Any Module

Continuing Care Display List, 76

Any Module (Except Office Manager)

Patient Questionnaire, 214

Prescription Printout, 250

Appointment Book

Appointment Book View Printout, 14

Collections Manager

Collections Manager List, 70

Continuing Care

Continuing Care Display List, 76

Document Center

Document Center Document, 112

Document Center List, 114

DXOne Reporting

Adjustment Summary Report, 4

Aging/Credit Balance Report, 6

Analysis Summary Report - Daily, 8

Analysis Summary Report - Standard, 12

Appointment Cycle Time Report, 16

Appointment Statistics Report, 20

As Soon As Possible List, 22

Assigned Rights Report, 24

Audit Report - Appointments, 26

Audit Report - Audit Log Status, 28

Audit Report - Clinics, 30

Audit Report - Combined, 32

Audit Report - Patients, 34

Audit Report - Providers/Staff, 36

Audit Report - Transactions, 38

Audit Rights Report - Assigned Individually, 40

Audit Rights Report - Assigned to Groups, 42

Audit Rights Report - Group Names, 44

Audit Rights Report - Users to Groups, 46

Birthday List, 50

Caries Prevalence and Periodontal Index Report, 52

Clinical Notes Report, 64

Credit Card Transaction Report, 80

Daily Appointment List (DX1), 84

Daily Summary Report, 88

Day Sheet (Adjustments) Report, 90

Day Sheet (Receipts) Report, 98

Day Sheet Report, 100

Dental Encounters Report, 106

Deposit Slip, 108

Employers and Employed Patients Report, 116

Fee Schedules Report, 122

Finance Charge Report, 124

Initial Health History Report, 130

Insurance Carrier List, 132

Insurance Carrier Production - Full Report, 136

Insurance Carrier Production - Summary Report, 138

Insurance Claim Aging Report, 140

Insurance Claims Not Sent Report, 142

Insurance Transaction Analysis Report, 148

Oral Health Education Report, 192

Patient Health Assessment Report, 198

Patient Information Accessed Report, 200

Patient List, 204

Payment Summary Report, 226

Periodontal Exam Report, 240

Practice Analysis Report, 242

Practice Organization List, 244

Practice Statistics Report, 246

Pre-Treatment Estimate Aging Report, 252

Pre-Treatment Estimates Not Sent Report, 254

Procedures Not Attached to Insurance Report, 258

Production Summary Report, 260

Provider A/R Totals - Daily Report, 264

Provider A/R Totals - Standard Report, 266

Provider IDs List, 272

Provider Revenue - Allocations Report, 274

Provider Revenue - Charges Report, 276

Provider Revenue - Credits Report, 278

Provider Revenue - Summary Report, 280

Referral Analysis Report, 282

Referred By Doctor/Other Report, 288

Referred By Patient Report, 290

Referred To Doctor Report, 292

RVU Day Sheet Report, 296

RVU Production Summary Report, 298

RVU Schedules Report, 302

RVU Utilization Report, 304

Secondary Insurance Claims Not Created Report, 306

Secondary Pre-Treatment Estimates Not Created Report, 308

Suspended Credits Report, 312

UDS - Age/Gender Report, 322

UDS - Encounters and Users by Selected Procedure Codes Report, 326

UDS - Encounters by Provider Report, 328

UDS - Insurance Financial Class Report (2013), 332

UDS - Insurance Financial Class Report, 330

UDS - Medicaid/Medicare Report, 334

UDS - Patient Related Revenue Report, 336

UDS - Patient Status Report, 338

UDS - Sealant Statistics Report, 340

UDS - Tobacco Use and Intervention Report, 342

Unscheduled Appointment List (DX1), 344

Utilization Report, 354

Family File

Clinical Notes Report, 64

Ledger

Appointment Reminder Cards, 18

Clinical Notes Report, 64

Coupon Book - Future Due Payments, 78

Coupon Book - Payment Agreements, 79

Patient Ledger Report, 202

Payment Agreement Amortization Schedule, 222

Referral Recap Report, 284

Truth in Lending Disclosure Statement, 320

Walkout - Doctor's Statement, 356

Walkout - Family Walkout, 358

Letters

Letter Merge Reports, 152

Office Journal

Office Journal Report, 186

Office Manager

Billing Statement, 48

Clinical Quality Measures List, 66

Continuing Care Cards - No Appointment, 74

Continuing Care Cards - with Appointment, 75

Custom Practice Information Report, 82

Daily Appointment List Report, 86

Day Sheet (Charges and Receipts) Report, 94

Dental Diagnostic Code List, 104

Family Ledger Report, 118

Family Ledger Report (Single Family), 120

Future Due Payment Plan Report - Monthly Totals, 126

Future Due Payment Plan Report - Standard, 128

Insurance Coverage Tables Report, 144

Insurance Eligibility Report, 146

Late Charge Report, 150

Letter Merge Reports, 152

Meaningful Use Measure Calculation List, 156

Medical Code List, 180

Multi-Code List, 182

New Patient List, 184

Operator Day Sheet Report, 188

Operatory Appointment List Report, 190

Patient List (Filtered), 206

Patient Notes Report, 208

Patient Route Slip, 216

Patient's Ledger Report, 220

Payment Agreement Report, 224

Procedure Code List, 256

Referral Recap Report, 284

Registration Information Report, 294

Standard Coverage Tables Report, 310

Treatment Plan Approval Report, 316

Treatment Plan Approval Status Report, 318

Unscheduled Appointment List (OM), 346

Unscheduled Treatment Plans (Condensed) Report, 348

Unscheduled Treatment Plans (Detailed) Report, 350

Updated Dental Insurance Payment Table Report, 352

Patient Chart

Clinical Notes Report, 64

Patient Chart and Progress Notes Printout, 194

Patient Chart Printout, 196

Patient Health Assessment Report, 198

Referral Recap Report, 284

Referral Slip, 286

Patient Questionnaire

Patient Questionnaire, 214

Perio Chart

Perio - Combined Graphic & Data Chart Report, 228

Perio - Data Chart Report, 230

Perio - Exam Comparison Report, 232

Perio - Graphic Chart Report, 234

Perio - Pocket Depths Only Report, 236

Perio Exam List, 238

Prescriptions

Prescription Printout, 250

Treatment Planner

Patient Proposed Treatment Case Report (Your Care Plan), 212

Patient Treatment Case Report, 218

Practice Treatment Case Report, 248

Treatment Case Report, 314

Index of Filters by Report

Adjustment Summary Report, 4

- Adjustment Types
- Billing Types
- Collecting Clinics
- Date Type
- Dates
- Patient Tags
- Providers
- Rendering Clinics

Aging/Credit Balance Report, 6

- Balance as of Date
- Balances
- Billing Types
- Clinics
- Date Type
- Days Past Due
- Guarantors
- Include Guarantor Notes
- Last Payment Before Date
- Patient Tags
- Providers

Analysis Summary Report - Daily, 8

- Billing Types
- Clinics
- Date Type
- Dates
- Patient Tags
- Providers
- Staff

Analysis Summary Report - Standard, 12

- Billing Types
- Clinics
- Date Type
- Dates
- Patient Tags
- Providers
- Staff

Appointment Book View Printout, 14

- Dates
- Operatories
- Providers
- Time

Appointment Cycle Time Report, 16

- Appointment Providers
- Appointment Statuses
- Clinics
- Dates
- In-operator Appointment Statuses
- Patient Tags

Appointment Reminder Cards, 18

N/A

Appointment Statistics Report, 20

- Appointment Providers
- Appointment Status Duration
- Appointment Statuses
- Clinics

Dates

- Maximum Appointment Status Duration (Cap)
- Maximum Duration of Appointments in Status Range (Cap)
- Time Zone

As Soon As Possible List, 22

- Appointment Providers
- Dates
- Patient Tags
- Primary Providers
- Time Zone

Assigned Rights Report, 24

- Clinics
- Rights
- Users

Audit Report - Appointments, 26

- Changes
- Dates
- Operatories
- Patient Tags
- Patients
- Time Zone
- Users Changed

Audit Report - Audit Log Status, 28

- Dates
- Time Zone
- Users

Audit Report - Clinics, 30

- Changes
- Clinics
- Dates
- Time Zone
- Users Changed

Audit Report - Combined, 32

- Actions
- Changes
- Clinics
- Dates
- Patient Tags
- Patients
- Time Zone
- Users Changed

Audit Report - Patients, 34

- Changes
- Clinics
- Dates
- Patient Tags
- Patients
- Time Zone
- Users Changed

Audit Report - Providers/Staff, 36

- Changes
- Clinics
- Dates
- Providers
- Staff

Time Zone	
Users Changed	
Audit Report - Transactions, 38	
Changes	
Clinics	
Dates	
Patient Tags	
Patients	
Time Zone	
Users Changed	
Audit Rights Report - Assigned Individually, 40	
Clinics	
Dates	
Rights	
Time Zone	
Users	
Users Changed	
Audit Rights Report - Assigned to Groups, 42	
Clinics	
Dates	
Rights	
Time Zone	
Users	
Users Changed	
Audit Rights Report - Group Names, 44	
Dates	
Time Zone	
User Groups	
Users Changed	
Audit Rights Report - Users to Groups, 46	
Clinics	
Dates	
Time Zone	
User Groups	
Users	
Users Changed	
Billing Statement, 48	
Balance Forward Date	
Billing Types	
Guarantors	
If not Billed since Date	
Minimum Balance to Bill	
Only Bill Aged Accounts	
Primary Providers	
Skip Account with Claim Pending	
Skip Accounts with Claim Pending if Patient Portion Less than Amount	
Birthday List, 50	
Billing Types	
Birth Dates	
Clinics	
Patient Tags	
Patients	
Providers	
Search as Date Range	
Staff	
Caries Prevalence and Periodontal Index Report, 52	
Clinics	
Dates	
Clinical Notes Report, 64	
Approval Status	
Clinics	
Dates	
Encounter Numbers	
Patient Tags	
Patients	
Providers	
Staff	
Time Zone	
Clinical Quality Measures List, 66	
Dates	
Providers	
Collections Manager List, 70	
Billing Types	
Clinics	
Guarantors	
Insurance Minimum Days Past Due	
Last Payment Before Date	
Minimum Balance	
Minimum Days Past Due	
Not Billed Since Date	
Number of Missed Payments	
Pending Claims	
Previous Office Journal Entry Before Date	
Providers	
Continuing Care Cards - No Appointment, 74	
Appointment without Continuing Care Type Attached	
Continuing Care Type	
Due Dates	
Continuing Care Cards - with Appointment, 75	
Appointment Dates	
Appointment with Continuing Care Attached	
Continuing Care Type	
Existing Patients with Appointment in Date Range	
Continuing Care Display List, 76	
Billing Types	
Clinics	
Continuing Care Status	
Continuing Care Type	
Due Dates	
Last Visit Dates	
Prior Treatment Dates	
Providers	
Scheduled Appointment	
Unscheduled Appointment	
Coupon Book - Future Due Payments, 78	
N/A	
Coupon Book - Payment Agreements, 79	
N/A	
Credit Card Transaction Report, 80	
Billing Types	
Dates	
Include Refunds	
Include Voids	
Operators	
Patient Tags	
Custom Practice Information Report, 82	
N/A	

Daily Appointment List (DX1), 84

Appointment Providers
 Clinics
 Dates
 Exclude Chart-Pulled Appointments
 Operatories
 Patient Tags
 Patients
 Providers

Daily Appointment List Report, 86

Dates
 Exclude Chart-Pulled Appointments
 Operatories
 Patients
 Providers

Daily Summary Report, 88

Adjustment Types
 Billing Types
 Clinics
 Date Type
 Dates
 Patient Tags
 Payment Types
 Time Zone

Day Sheet (Adjustments) Report, 90

Adjustment Types
 Billing Types
 Clinics
 Date Type
 Dates
 Patient Tags
 Providers

Day Sheet (Charges and Receipts) Report, 94

Billing Types
 Clinics
 Dates
 Operators
 Providers

Day Sheet (Receipts) Report, 98

Billing Types
 Chart Numbers
 Clinics
 Date Type
 Dates
 Patient Tags
 Payment Types
 Providers

Day Sheet Report, 100

Billing Types
 Clinics
 Date Type
 Dates
 Patient Tags
 Providers
 Staff

Dental Diagnostic Code List, 104

N/A

Dental Encounters Report, 106

Clinics
 Date Type
 Insurance Carriers

Patient Tags
 Patients
 Procedure Dates
 Providers

Deposit Slip, 108

Billing Types
 Clinics
 Date Type
 Dates
 Operators
 Patient Tags
 Payment Types

Document Center Document, 112

N/A

Document Center List, 114

N/A

Employers and Employed Patients Report, 116

Clinics
 Employers
 Include Employees
 Providers
 Staff

Family Ledger Report, 118

Billing Types
 First Transaction Date
 Guarantors
 Providers

Family Ledger Report (Single Family), 120

First Transaction Date

Fee Schedules Report, 122

ADA Codes
 Fee Schedule

Finance Charge Report, 124

Billing Types
 Clinics
 Date Type
 Dates
 Patient Tags
 Providers
 Staff

Future Due Payment Plan Report - Monthly Totals, 126

Billing Types
 Dates
 Guarantors
 Providers

Future Due Payment Plan Report - Standard, 128

Billing Types
 Dates
 Guarantors
 Providers

Initial Health History Report, 130

ADA Codes
 Ages
 Clinics
 Conditions
 Date Type
 Dates
 Include Completed Procedures Only
 Include Detail
 Include Patients in Numerator Only if Exist in

- Denominator
- Patient Tags
- Providers
- Insurance Carrier List, 132**
 - Clinics
 - Financial Classes
 - Include All Patients
 - Include Provider IDs
 - Include Subscribers
 - Insurance Carriers
 - Insurance Type
- Insurance Carrier Production - Full Report, 136**
 - Clinics
 - Date Type
 - Dates
 - Financial Classes
 - Insurance Carriers
 - Insurance Type
 - Patient Tags
 - Patients
 - Providers
- Insurance Carrier Production - Summary Report, 138**
 - Clinics
 - Date Type
 - Dates
 - Financial Classes
 - Insurance Carriers
 - Insurance Type
 - Patient Tags
 - Patients
 - Providers
- Insurance Claim Aging Report, 140**
 - Age Amount Outstanding
 - Age Insurance Estimate
 - Age Total Billed
 - Billing Types
 - Clinics
 - Insurance Carriers
 - Insurance Type
 - Minimum Days Past Due
 - Patient Tags
 - Patients
 - Providers
 - Show Open Claims Only
- Insurance Claims Not Sent Report, 142**
 - Billing Types
 - Clinics
 - Dates
 - Insurance Carriers
 - Insurance Type
 - Patient Tags
 - Patients
 - Providers
 - Staff
- Insurance Coverage Tables Report, 144**
 - N/A
- Insurance Eligibility Report, 146**
 - Appointment Dates
 - Clinics
 - Employers
 - Insurance Carriers
 - Patients
 - Providers
- Patients
- Providers
- Insurance Transaction Analysis Report, 148**
 - Billing Provider
 - Billing Types
 - Charge Date
 - Charge Provider
 - Claim Received Date
 - Claim Rendering Provider
 - Claim Sent Date
 - Clinics
 - Date Type
 - Dates
 - Display Allocate Date for Payments
 - Financial Classes
 - Include Charge Adjustments
 - Include Charges
 - Include Credit Adjustments
 - Include Grand Totals
 - Include Insurance Payments
 - Include Patient Payments
 - Include Quaternary Claims
 - Include Secondary Claims
 - Include Subtotals by Carrier
 - Include Tertiary Claims
 - Insurance Carriers
 - Insurance Type
 - Patient Tags
 - Pay To Provider
 - Providers
- Late Charge Report, 150**
 - Billing Types
 - Clinics
 - Date Type
 - Dates
 - Patient Tags
 - Providers
 - Staff
- Letter Merge Reports, 152**
 - 0 Account Balance
 - ADA Codes
 - Allergies
 - Amount Aged <30
 - Amount Aged <60
 - Amount Aged <90
 - Amount Aged <90+
 - Appointment Dates
 - Balances
 - Billing Types
 - Birthday Days
 - Birthday Months
 - Birthday Years
 - Cities
 - Clinics
 - Completed Procedures
 - Consent Dates
 - Continuing Care Attached to Appointment
 - Continuing Care Due Dates
 - Continuing Care Prior Treatment Dates
 - Continuing Care Type
 - Continuing Care not Attached to Appointment
 - Credit Balance

- Employers
- Existing Patients with Appointments in Date Range
- Existing Patients with no Appointments in Date Range
- Existing Procedures
- First Visit Dates
- Insurance Carriers
- Last Payment Plan Payment Dates
- Last Referral Dates
- Last Visit Dates
- Medical Alerts
- Medications
- No Insurance Coverage
- Note Texts
- Only Guarantors
- Patient Gender
- Patient Marital Status
- Patient Names
- Patient Status
- Payment Plan Balances
- Primary Insurance Coverage
- Privacy Requests for no Correspondence for Patients and Guarantors
- Privacy Requests for no Correspondence for Referred by Patients
- Procedure Dates
- Prospective Patients with Appointments in Date Range
- Providers
- Referred by Dates
- Referred by Doctor/Other
- Referred by Patient
- Referred by Sources
- Referred to Dates
- Referred to Names
- Remaining Insurance Benefit Amounts
- Secondary Insurance Coverage
- Treatment-planned Procedures
- ZIP Codes
- Meaningful Use Measure Calculation List, 156**
 - Alternative Measure for CPOE
 - Alternative Measure for Vital Signs
 - Blood Pressure
 - Dates
 - Height/Length and Weight
 - Meaningful Use Stages
 - Providers
- Medical Code List, 180**
 - AMA CPT Codes
 - ICD-10CM Codes
 - ICD-9CM Codes
 - Modifier Codes
 - Place of Service Codes
 - Type of Service Codes
- Multi-Code List, 182**
 - Multi-Codes
- New Patient List, 184**
 - First Visit Dates
 - Patients
 - Providers
- Office Journal Report, 186**
 - N/A
- Operator Day Sheet Report, 188**
 - N/A
- Operatory Appointment List Report, 190**
 - Dates
 - Operatories
 - Patients
 - Providers
- Oral Health Education Report, 192**
 - ADA Codes
 - Ages
 - Clinics
 - Conditions
 - Date Type
 - Dates
 - Include Completed Procedures Only
 - Include Detail
 - Include Patients in Numerator Only if Exist in Denominator
 - Patient Tags
 - Providers
- Patient Chart and Progress Notes Printout, 194**
 - N/A
- Patient Chart Printout, 196**
 - N/A
- Patient Health Assessment Report, 198**
 - Clinics
 - Dates
 - Patient Tags
 - Patients
- Patient Information Accessed Report, 200**
 - Clinics
 - Dates
 - Families
 - Modules
 - Patient Tags
 - Patients
 - Time Zone
 - Users Changed
- Patient Ledger Report, 202**
 - Billing Types
 - First Transaction Date
 - Patients
 - Providers
- Patient List, 204**
 - Billing Types
 - Clinics
 - Last Visit Before Date
 - No Continuing Care and no Future Appointments
 - Patient Statuses
 - Patient Tags
 - Patients
 - Providers
- Patient List (Filtered), 206**
 - Ages
 - Allergies
 - Clinics
 - Completed Procedures
 - Continuing Care
 - Dates
 - Ethnicity
 - Gender
 - Homeless Status
 - ICD-9-CM Diagnostic Codes

Laboratory Test Results	
Language	
Medical Alerts	
Medications	
Poverty Level	
Preferred Contact Method	
Prescriptions	
Primary Provider	
Race	
Religion	
User Defined Category	
Veteran Status	
Worker Status	
Patient Notes Report, 208	
Billing Types	
Dates (for Appointment Notes)	
Dates (for Clinical Notes)	
Dates (for Patient Alert Notes)	
Dates (for Perio Exam Notes)	
Only Guarantors	
Patients	
Providers	
Patient Proposed Treatment Case Report (Your Care Plan), 212	
N/A	
Patient Questionnaire, 214	
N/A	
Patient Route Slip, 216	
N/A	
Patient Treatment Case Report, 218	
Case Severity	
Case Status	
Expiration Dates	
Procedure Dates	
Providers	
Patient's Ledger Report, 220	
N/A	
Payment Agreement Amortization Schedule, 222	
N/A	
Payment Agreement Report, 224	
Billing Types	
Clinics	
Guarantors	
Number of Payments Missed	
Payment Agreement Dates	
Payment Agreement Intervals	
Previous Payment Due Date	
Providers	
Remaining Balances	
Remaining Number of Payments	
Payment Summary Report, 226	
Billing Types	
Collecting Clinics	
Date Type	
Dates	
Patient Tags	
Payment Types	
Providers	
Rendering Clinics	
Perio - Combined Graphic & Data Chart Report, 228	
N/A	
Perio - Data Chart Report, 230	
N/A	
Perio - Exam Comparison Report, 232	
N/A	
Perio - Graphic Chart Report, 234	
N/A	
Perio - Pocket Depths Only Report, 236	
N/A	
Perio Exam List, 238	
Dates	
Patients	
Periodontal Exam Report, 240	
ADA Codes	
Ages	
Clinics	
Conditions	
Date Type	
Dates	
Include Completed Procedures Only	
Include Detail	
Include Patients in Numerator Only if Exist in	
Denominator	
Patient Tags	
Providers	
Practice Analysis Report, 242	
Clinics	
Date Type	
Dates	
Providers	
Staff	
Practice Organization List, 244	
Clinics	
Providers	
Staff	
Practice Statistics Report, 246	
Age Statistics	
Clinics	
Continuing Care Statistics	
New Patient Statistics	
Patient Statistics	
Prophy Types	
Provider Statistics	
Providers	
Staff	
ZIP Code Statistics	
Practice Treatment Case Report, 248	
Billing Types	
Case Severity	
Case Status	
Expiration Dates	
Patients	
Procedure Dates	
Providers	
Prescription Printout, 250	
N/A	
Pre-Treatment Estimate Aging Report, 252	
Age Insurance Estimate	
Age Total Billed	

- Billing Types
- Clinics
- Insurance Carriers
- Insurance Type
- Minimum Days Past Due
- Patient Tags
- Patients
- Providers
- Staff

Pre-Treatment Estimates Not Sent Report, 254

- Billing Types
- Clinics
- Dates
- Insurance Carriers
- Insurance Type
- Patient Tags
- Patients
- Providers
- Staff

Procedure Code List, 256

- Procedure Codes

Procedures Not Attached to Insurance Report, 258

- Billing Types
- Clinics
- Dates
- Insurance Type
- Patient Tags
- Patients
- Providers
- Staff
- With a Medical Claim (Received)
- With a Medical Claim (Sent or Received)
- With a Medical Claim (Sent)
- With or Without a Medical Claim
- Without a Medical Claim

Production Summary Report, 260

- ADA Codes
- Billing Types
- Clinics
- Date Type
- Dates
- Include Patient Detail
- Patient Tags
- Production Categories
- Providers
- Separate Totals for Medicaid and Non-Medicaid
- Patients
- Staff

Provider A/R Totals - Daily Report, 264

- ADA Codes
- Billing Types
- Collecting Clinics
- Collections Date Type
- Date Type
- Dates
- Include Adjustment Type List
- Providers
- Rendering Clinics

Provider A/R Totals - Standard Report, 266

- ADA Codes
- Billing Types
- Collecting Clinics

- Collections Date Type
- Date Type
- Dates
- Include Adjustment Type List
- Providers
- Rendering Clinics

Provider IDs List, 272

- Clinics
- Insurance Carriers
- Insurance Types
- Providers
- Staff

Provider Revenue - Allocations Report, 274

- Allocations
- Allocations for Credits Not Posted
- Allocations for Credits Posted
- Allocations for Previously Suspended Credits
- Billing Types
- Collecting Clinics
- Credit Adjustment Types
- Dates
- Guarantors
- Patient Tags
- Payment Types
- Providers
- Rendering Clinics

Provider Revenue - Charges Report, 276

- Allocations
- Allocations for Credits Not Posted
- Allocations for Credits Posted
- Allocations for Previously Suspended Credits
- Billing Types
- Collecting Clinics
- Credit Adjustment Types
- Dates
- Guarantors
- Patient Tags
- Payment Types
- Providers
- Rendering Clinics

Provider Revenue - Credits Report, 278

- Allocations
- Allocations for Credits Not Posted
- Allocations for Credits Posted
- Allocations for Previously Suspended Credits
- Billing Types
- Collecting Clinics
- Credit Adjustment Types
- Dates
- Guarantors
- Patient Tags
- Payment Types
- Providers
- Rendering Clinics

Provider Revenue - Summary Report, 280

- Allocations
- Allocations for Credits Not Posted
- Allocations for Credits Posted
- Allocations for Previously Suspended Credits
- Billing Types
- Collecting Clinics
- Credit Adjustment Types

Dates	
Guarantors	
Patient Tags	
Payment Types	
Providers	
Rendering Clinics	
Referral Analysis Report, 282	
Clinics	
Date Type	
First Visit Dates	
Patient Tags	
Providers	
Treatment Dates	
Referral Recap Report, 284	
ADA Codes	
Billing Types	
Completed Work Dates	
Patients	
Providers	
Referral Sources	
Referral Slip, 286	
N/A	
Referred By Doctor/Other Report, 288	
ADA Codes	
Include All Referral Sources	
Patients with No Production or Treatment-planned Procedures	
Production Dates	
Providers	
Referral Dates	
Referring Doctors/Others	
Skip Non-persons	
Referred By Patient Report, 290	
Production Dates	
Providers	
Referral Dates	
Referring Patients	
Referred To Doctor Report, 292	
ADA Codes	
Clinics	
Days Referred Out	
Include All Referral Sources	
Include Patients without Production	
Providers	
Refer to Doctors	
Referral Dates	
Referral Status	
Registration Information Report, 294	
N/A	
RVU Day Sheet Report, 296	
Billing Types	
Clinics	
Date Type	
Dates	
Exclude RVU Fees Equal to Zero	
Include Procedures	
Patient Tags	
Providers	
Staff	
Subtract Lab Expenses	
Unique Patient Count	
Unique Visit Count	
RVU Production Summary Report, 298	
ADA Codes	
Billing Types	
Clinics	
Date Type	
Dates	
Include Patient Detail	
Patient Tags	
Procedure Categories	
Providers	
Staff	
Subtract Lab Expenses	
RVU Schedules Report, 302	
ADA Codes	
RVU Schedules	
RVU Utilization Report, 304	
ADA Codes	
Billing Types	
Clinics	
Compare Fee Schedule with Co-pay (from Coverage Table)	
Compare Fee Schedule with Transaction Amount	
Date Type	
Dates	
Include All Procedures	
Include Only Procedures in Coverage Table	
Insurance Carriers	
Insurance Plan Totals Only	
Patient Tags	
Providers	
RVU Schedule	
Staff	
Secondary Insurance Claims Not Created Report, 306	
Billing Types	
Clinics	
Dates	
Include Primary Claims not Received	
Insurance Carriers	
Insurance Type	
Patient Tags	
Patients	
Providers	
Staff	
Secondary Pre-Treatment Estimates Not Created Report, 308	
Billing Types	
Clinics	
Dates	
Include Primary Pre-treatment Estimates Not Received	
Insurance Carriers	
Patient Tags	
Patients	
Providers	
Standard Coverage Tables Report, 310	
Coverage Tables	
Suspended Credits Report, 312	
Billing Types	
Clinics	
Date Type	
Dates	

- Guarantors
- Patient Tags
- Treatment Case Report, 314**
- Visits
- Treatment Plan Approval Report, 316**
- Clinics
- Dates
- Employers
- Insurance Carriers
- Patients
- Providers
- Starting Treatment Plan Amount
- Treatment Plan Approval Status Report, 318**
- Approval Status
- Clinics
- Dates
- Employers
- Insurance Carriers
- Only Search for Procedures that Have Had a Pre-treatment Estimate Created
- Patients
- Procedures
- Providers
- Starting Treatment Plan Amount
- Truth in Lending Disclosure Statement, 320**
- N/A
- UDS - Age/Gender Report, 322**
- ADA Codes
- Ages
- Billing Types
- Calculate Ages Based On UDS Report Requirements (as of June 30th)
- Clinics
- Date Type
- Dates
- Include Patient Info
- Patient Tags
- Providers
- UDS - Encounters and Users by Selected Procedure Codes Report, 326**
- ADA Codes
- Billing Types
- Clinics
- Date Type
- Dates
- Include Patient Info
- Patient Tags
- Providers
- UDS - Encounters by Provider Report, 328**
- ADA Codes
- Billing Types
- Clinics
- Date Type
- Dates
- Include Patient Info
- Patient Tags
- Providers
- UDS - Insurance Financial Class Report, 330**
- ADA Codes
- Billing Types
- Clinics
- Date Type
- Dates
- Financial Classes
- Include Patient Info
- Providers
- UDS - Insurance Financial Class Report (2013), 332**
- ADA Codes
- Age Group 1 Cutoff
- Billing Types
- Clinics
- Date Type
- Dates
- Financial Classes
- Include Age Groups (as of June 30th)
- Include Patient Info
- Insurance Types
- Patient Tags
- Providers
- UDS - Medicaid/Medicare Report, 334**
- Age Group 1 Cutoff
- Dates
- Financial Classes
- Include Age Groups (as of June 30th)
- Include Patient Info
- UDS - Patient Related Revenue Report, 336**
- ADA Codes
- Adjustment Types
- Clinics
- Dates
- Fee Schedules
- Financial Classes
- Include Patient Info
- Include Suspended Payments and Adjustments
- Providers
- Staff
- UDS - Patient Status Report, 338**
- ADA Codes
- Billing Types
- Clinics
- Date Type
- Dates
- Ethnicities
- Gender Identities
- Health Insurances
- Homeless Status
- Housing Statuses
- Include Patient Info
- Languages
- Patient Tags
- Poverty Level
- Providers
- Races
- Religions
- Sexual Orientations
- User-defined Category
- Veteran Status
- Worker Status
- ZIP Codes
- UDS - Sealant Statistics Report, 340**
- ADA Codes
- Birth Dates
- Caries Risk Codes

Dates	Walkout - Family Walkout, 358
Include Patient Info	N/A
Sealant Codes	
Sealant Ineligibility Codes	
Visit Codes	
UDS - Tobacco Use and Intervention Report, 342	
Billing Types	
Clinics	
Dates	
Include Patient Info	
Providers	
Unscheduled Appointment List (DX1), 344	
Clinics	
Dates	
Include Appointment Break Reason	
Patient Tags	
Providers	
Time Zone	
Unscheduled Appointment List (OM), 346	
Providers	
Unscheduled Appointment Dates	
Unscheduled Treatment Plans (Condensed) Report, 348	
Dates	
Exclude Non-referred Procedures	
Exclude Referred by Procedures	
Exclude Referred to Procedures	
Patients	
Primary Providers	
Treatment Plan Providers	
Unscheduled Treatment Plans (Detailed) Report, 350	
Dates	
Exclude Non-referred Procedures	
Exclude Referred by Procedures	
Exclude Referred to Procedures	
Patients	
Primary Providers	
Treatment Plan Providers	
Updated Dental Insurance Payment Table Report, 352	
Insurance Carriers	
Utilization Report, 354	
ADA Codes	
Billing Types	
Clinics	
Compare Fee Schedule with Co-pay (from Coverage Table)	
Compare Fee Schedule with Transaction Amount	
Date Type	
Dates	
Fee Schedule	
Include All Procedures	
Include Only Procedures in Coverage Table	
Insurance Carriers	
Insurance Plan Totals Only	
Patient Tags	
Providers	
Staff	
Walkout - Doctor's Statement, 356	
N/A	

Index by Filter

0 Account Balance

Letter Merge Reports, 152

Actions

Audit Report - Combined, 32

ADA Codes

Fee Schedules Report, 122
 Initial Health History Report, 130
 Letter Merge Reports, 152
 Oral Health Education Report, 192
 Periodontal Exam Report, 240
 Production Summary Report, 260
 Provider A/R Totals - Daily Report, 264
 Provider A/R Totals - Standard Report, 266
 Referral Recap Report, 284
 Referred By Doctor/Other Report, 288
 Referred To Doctor Report, 292
 RVU Production Summary Report, 298
 RVU Schedules Report, 302
 RVU Utilization Report, 304
 UDS - Age/Gender Report, 322
 UDS - Encounters and Users by Selected Procedure Codes Report, 326
 UDS - Encounters by Provider Report, 328
 UDS - Insurance Financial Class Report, 330
 UDS - Insurance Financial Class Report (2013), 332
 UDS - Patient Related Revenue Report, 336
 UDS - Patient Status Report, 338
 UDS - Sealant Statistics Report, 340
 Utilization Report, 354

Adjustment Types

Adjustment Summary Report, 4
 Daily Summary Report, 88
 Day Sheet (Adjustments) Report, 90
 UDS - Patient Related Revenue Report, 336

Age Amount Outstanding

Insurance Claim Aging Report, 140

Age Group 1 Cutoff

UDS - Insurance Financial Class Report (2013), 332
 UDS - Medicaid/Medicare Report, 334

Age Insurance Estimate

Insurance Claim Aging Report, 140
 Pre-Treatment Estimate Aging Report, 252

Age Statistics

Practice Statistics Report, 246

Age Total Billed

Insurance Claim Aging Report, 140
 Pre-Treatment Estimate Aging Report, 252

Ages

Initial Health History Report, 130
 Oral Health Education Report, 192
 Patient List (Filtered), 206
 Periodontal Exam Report, 240
 UDS - Age/Gender Report, 322

Allergies

Letter Merge Reports, 152
 Patient List (Filtered), 206

Allocations

Provider Revenue - Allocations Report, 274
 Provider Revenue - Charges Report, 276
 Provider Revenue - Credits Report, 278
 Provider Revenue - Summary Report, 280

Allocations for Credits Not Posted

Provider Revenue - Allocations Report, 274
 Provider Revenue - Charges Report, 276
 Provider Revenue - Credits Report, 278
 Provider Revenue - Summary Report, 280

Allocations for Credits Posted

Provider Revenue - Allocations Report, 274
 Provider Revenue - Charges Report, 276
 Provider Revenue - Credits Report, 278
 Provider Revenue - Summary Report, 280

Allocations for Previously Suspended Credits

Provider Revenue - Allocations Report, 274
 Provider Revenue - Charges Report, 276
 Provider Revenue - Credits Report, 278
 Provider Revenue - Summary Report, 280

Alternative Measure for CPOE

Meaningful Use Measure Calculation List, 156

Alternative Measure for Vital Signs

Meaningful Use Measure Calculation List, 156

AMA CPT Codes

Medical Code List, 180

Amount Aged <30

Letter Merge Reports, 152

Amount Aged <60

Letter Merge Reports, 152

Amount Aged <90

Letter Merge Reports, 152

Amount Aged <90+

Letter Merge Reports, 152

Appointment Dates

Continuing Care Cards - with Appointment, 75
 Insurance Eligibility Report, 146
 Letter Merge Reports, 152

Appointment Providers

Appointment Cycle Time Report, 16
 Appointment Statistics Report, 20
 As Soon As Possible List, 22
 Daily Appointment List (DX1), 84

Appointment Status Duration

Appointment Statistics Report, 20

Appointment Statuses

Appointment Cycle Time Report, 16
 Appointment Statistics Report, 20

Appointment with Continuing Care Attached

Continuing Care Cards - with Appointment, 75

Appointment without Continuing Care Type Attached

Continuing Care Cards - No Appointment, 74

Approval Status

Clinical Notes Report, 64
 Treatment Plan Approval Status Report, 318

Balance as of Date

Aging/Credit Balance Report, 6

Balance Forward Date

Billing Statement, 48

Balances

Aging/Credit Balance Report, 6

Letter Merge Reports, 152

Billing Provider

Insurance Transaction Analysis Report, 148

Billing Types

Adjustment Summary Report, 4
 Aging/Credit Balance Report, 6
 Analysis Summary Report - Daily, 8
 Analysis Summary Report - Standard, 12
 Billing Statement, 48
 Birthday List, 50
 Collections Manager List, 70
 Continuing Care Display List, 76
 Credit Card Transaction Report, 80
 Daily Summary Report, 88
 Day Sheet (Adjustments) Report, 90
 Day Sheet (Charges and Receipts) Report, 94
 Day Sheet (Receipts) Report, 98
 Day Sheet Report, 100
 Deposit Slip, 108
 Family Ledger Report, 118
 Finance Charge Report, 124
 Future Due Payment Plan Report - Monthly Totals, 126
 Future Due Payment Plan Report - Standard, 128
 Insurance Claim Aging Report, 140
 Insurance Claims Not Sent Report, 142
 Insurance Transaction Analysis Report, 148
 Late Charge Report, 150
 Letter Merge Reports, 152
 Patient Ledger Report, 202
 Patient List, 204
 Patient Notes Report, 208
 Payment Agreement Report, 224
 Payment Summary Report, 226
 Practice Treatment Case Report, 248
 Pre-Treatment Estimate Aging Report, 252
 Pre-Treatment Estimates Not Sent Report, 254
 Procedures Not Attached to Insurance Report, 258
 Production Summary Report, 260
 Provider A/R Totals - Daily Report, 264
 Provider A/R Totals - Standard Report, 266
 Provider Revenue - Allocations Report, 274
 Provider Revenue - Charges Report, 276
 Provider Revenue - Credits Report, 278
 Provider Revenue - Summary Report, 280
 Referral Recap Report, 284
 RVU Day Sheet Report, 296
 RVU Production Summary Report, 298
 RVU Utilization Report, 304
 Secondary Insurance Claims Not Created Report, 306
 Secondary Pre-Treatment Estimates Not Created Report, 308
 Suspended Credits Report, 312
 UDS - Age/Gender Report, 322
 UDS - Encounters and Users by Selected Procedure Codes Report, 326
 UDS - Encounters by Provider Report, 328

UDS - Insurance Financial Class Report, 330

UDS - Insurance Financial Class Report (2013), 332

UDS - Patient Status Report, 338

UDS - Tobacco Use and Intervention Report, 342

Utilization Report, 354

Birth Dates

Birthday List, 50

UDS - Sealant Statistics Report, 340

Birthday Days

Letter Merge Reports, 152

Birthday Months

Letter Merge Reports, 152

Birthday Years

Letter Merge Reports, 152

Blood Pressure

Meaningful Use Measure Calculation List, 156

Calculate Ages Based On UDS Report Requirements (as of June 30th)

UDS - Age/Gender Report, 322

Caries Risk Codes

UDS - Sealant Statistics Report, 340

Case Severity

Patient Treatment Case Report, 218

Practice Treatment Case Report, 248

Case Status

Patient Treatment Case Report, 218

Practice Treatment Case Report, 248

Changes

Audit Report - Appointments, 26

Audit Report - Clinics, 30

Audit Report - Combined, 32

Audit Report - Patients, 34

Audit Report - Providers/Staff, 36

Audit Report - Transactions, 38

Charge Date

Insurance Transaction Analysis Report, 148

Charge Provider

Insurance Transaction Analysis Report, 148

Chart Numbers

Day Sheet (Receipts) Report, 98

Cities

Letter Merge Reports, 152

Claim Received Date

Insurance Transaction Analysis Report, 148

Claim Rendering Provider

Insurance Transaction Analysis Report, 148

Claim Sent Date

Insurance Transaction Analysis Report, 148

Clinics

Aging/Credit Balance Report, 6

Analysis Summary Report - Daily, 8

Analysis Summary Report - Standard, 12

Appointment Cycle Time Report, 16

Appointment Statistics Report, 20

Assigned Rights Report, 24

Audit Report - Clinics, 30

Audit Report - Combined, 32

Audit Report - Patients, 34

Audit Report - Providers/Staff, 36

Audit Report - Transactions, 38

Audit Rights Report - Assigned Individually, 40

Audit Rights Report - Assigned to Groups, 42
 Audit Rights Report - Users to Groups, 46
 Birthday List, 50
 Caries Prevalence and Periodontal Index Report, 52
 Clinical Notes Report, 64
 Collections Manager List, 70
 Continuing Care Display List, 76
 Daily Appointment List (DX1), 84
 Daily Summary Report, 88
 Day Sheet (Adjustments) Report, 90
 Day Sheet (Charges and Receipts) Report, 94
 Day Sheet (Receipts) Report, 98
 Day Sheet Report, 100
 Dental Encounters Report, 106
 Deposit Slip, 108
 Employers and Employed Patients Report, 116
 Finance Charge Report, 124
 Initial Health History Report, 130
 Insurance Carrier List, 132
 Insurance Carrier Production - Full Report, 136
 Insurance Carrier Production - Summary Report, 138
 Insurance Claim Aging Report, 140
 Insurance Claims Not Sent Report, 142
 Insurance Eligibility Report, 146
 Insurance Transaction Analysis Report, 148
 Late Charge Report, 150
 Letter Merge Reports, 152
 Oral Health Education Report, 192
 Patient Health Assessment Report, 198
 Patient Information Accessed Report, 200
 Patient List, 204
 Patient List (Filtered), 206
 Payment Agreement Report, 224
 Periodontal Exam Report, 240
 Practice Analysis Report, 242
 Practice Organization List, 244
 Practice Statistics Report, 246
 Pre-Treatment Estimate Aging Report, 252
 Pre-Treatment Estimates Not Sent Report, 254
 Procedures Not Attached to Insurance Report, 258
 Production Summary Report, 260
 Provider IDs List, 272
 Referral Analysis Report, 282
 Referred To Doctor Report, 292
 RVU Day Sheet Report, 296
 RVU Production Summary Report, 298
 RVU Utilization Report, 304
 Secondary Insurance Claims Not Created Report, 306
 Secondary Pre-Treatment Estimates Not Created Report, 308
 Suspended Credits Report, 312
 Treatment Plan Approval Report, 316
 Treatment Plan Approval Status Report, 318
 UDS - Age/Gender Report, 322
 UDS - Encounters and Users by Selected Procedure Codes Report, 326
 UDS - Encounters by Provider Report, 328
 UDS - Insurance Financial Class Report, 330
 UDS - Insurance Financial Class Report (2013), 332
 UDS - Patient Related Revenue Report, 336
 UDS - Patient Status Report, 338

UDS - Tobacco Use and Intervention Report, 342
 Unscheduled Appointment List (DX1), 344
 Utilization Report, 354

Collecting Clinics

Adjustment Summary Report, 4
 Payment Summary Report, 226
 Provider A/R Totals - Daily Report, 264
 Provider A/R Totals - Standard Report, 266
 Provider Revenue - Allocations Report, 274
 Provider Revenue - Charges Report, 276
 Provider Revenue - Credits Report, 278
 Provider Revenue - Summary Report, 280

Collections Date Type

Provider A/R Totals - Daily Report, 264
 Provider A/R Totals - Standard Report, 266

Compare Fee Schedule with Co-pay (from Coverage Table)

RVU Utilization Report, 304
 Utilization Report, 354

Compare Fee Schedule with Transaction Amount

RVU Utilization Report, 304
 Utilization Report, 354

Completed Procedures

Letter Merge Reports, 152
 Patient List (Filtered), 206

Completed Work Dates

Referral Recap Report, 284

Conditions

Initial Health History Report, 130
 Oral Health Education Report, 192
 Periodontal Exam Report, 240

Consent Dates

Letter Merge Reports, 152

Continuing Care

Patient List (Filtered), 206

Continuing Care Attached to Appointment

Letter Merge Reports, 152

Continuing Care Due Dates

Letter Merge Reports, 152

Continuing Care not Attached to Appointment

Letter Merge Reports, 152

Continuing Care Prior Treatment Dates

Letter Merge Reports, 152

Continuing Care Statistics

Practice Statistics Report, 246

Continuing Care Status

Continuing Care Display List, 76

Continuing Care Type

Continuing Care Cards - No Appointment, 74
 Continuing Care Cards - with Appointment, 75
 Continuing Care Display List, 76
 Letter Merge Reports, 152

Coverage Tables

Standard Coverage Tables Report, 310

Credit Adjustment Types

Provider Revenue - Allocations Report, 274
 Provider Revenue - Charges Report, 276
 Provider Revenue - Credits Report, 278
 Provider Revenue - Summary Report, 280

Credit Balance

Letter Merge Reports, 152

Date Type

Adjustment Summary Report, 4
 Aging/Credit Balance Report, 6
 Analysis Summary Report - Daily, 8
 Analysis Summary Report - Standard, 12
 Daily Summary Report, 88
 Day Sheet (Adjustments) Report, 90
 Day Sheet (Receipts) Report, 98
 Day Sheet Report, 100
 Dental Encounters Report, 106
 Deposit Slip, 108
 Finance Charge Report, 124
 Initial Health History Report, 130
 Insurance Carrier Production - Full Report, 136
 Insurance Carrier Production - Summary Report, 138
 Insurance Transaction Analysis Report, 148
 Late Charge Report, 150
 Oral Health Education Report, 192
 Payment Summary Report, 226
 Periodontal Exam Report, 240
 Practice Analysis Report, 242
 Production Summary Report, 260
 Provider A/R Totals - Daily Report, 264
 Provider A/R Totals - Standard Report, 266
 Referral Analysis Report, 282
 RVU Day Sheet Report, 296
 RVU Production Summary Report, 298
 RVU Utilization Report, 304
 Suspended Credits Report, 312
 UDS - Age/Gender Report, 322
 UDS - Encounters and Users by Selected Procedure Codes Report, 326
 UDS - Encounters by Provider Report, 328
 UDS - Insurance Financial Class Report, 330
 UDS - Insurance Financial Class Report (2013), 332
 UDS - Patient Status Report, 338
 Utilization Report, 354

Dates

Adjustment Summary Report, 4
 Analysis Summary Report - Daily, 8
 Analysis Summary Report - Standard, 12
 Appointment Book View Printout, 14
 Appointment Cycle Time Report, 16
 Appointment Statistics Report, 20
 As Soon As Possible List, 22
 Audit Report - Appointments, 26
 Audit Report - Audit Log Status, 28
 Audit Report - Clinics, 30
 Audit Report - Combined, 32
 Audit Report - Patients, 34
 Audit Report - Providers/Staff, 36
 Audit Report - Transactions, 38
 Audit Rights Report - Assigned Individually, 40
 Audit Rights Report - Assigned to Groups, 42
 Audit Rights Report - Group Names, 44
 Audit Rights Report - Users to Groups, 46
 Caries Prevalence and Periodontal Index Report, 52
 Clinical Notes Report, 64
 Clinical Quality Measures List, 66
 Credit Card Transaction Report, 80
 Daily Appointment List (DX1), 84
 Daily Appointment List Report, 86

Daily Summary Report, 88
 Day Sheet (Adjustments) Report, 90
 Day Sheet (Charges and Receipts) Report, 94
 Day Sheet (Receipts) Report, 98
 Day Sheet Report, 100
 Deposit Slip, 108
 Finance Charge Report, 124
 Future Due Payment Plan Report - Monthly Totals, 126
 Future Due Payment Plan Report - Standard, 128
 Initial Health History Report, 130
 Insurance Carrier Production - Full Report, 136
 Insurance Carrier Production - Summary Report, 138
 Insurance Claims Not Sent Report, 142
 Insurance Transaction Analysis Report, 148
 Late Charge Report, 150
 Meaningful Use Measure Calculation List, 156
 Operatory Appointment List Report, 190
 Oral Health Education Report, 192
 Patient Health Assessment Report, 198
 Patient Information Accessed Report, 200
 Patient List (Filtered), 206
 Payment Summary Report, 226
 Perio Exam List, 238
 Periodontal Exam Report, 240
 Practice Analysis Report, 242
 Pre-Treatment Estimates Not Sent Report, 254
 Procedures Not Attached to Insurance Report, 258
 Production Summary Report, 260
 Provider A/R Totals - Daily Report, 264
 Provider A/R Totals - Standard Report, 266
 Provider Revenue - Allocations Report, 274
 Provider Revenue - Charges Report, 276
 Provider Revenue - Credits Report, 278
 Provider Revenue - Summary Report, 280
 RVU Day Sheet Report, 296
 RVU Production Summary Report, 298
 RVU Utilization Report, 304
 Secondary Insurance Claims Not Created Report, 306
 Secondary Pre-Treatment Estimates Not Created Report, 308
 Suspended Credits Report, 312
 Treatment Plan Approval Report, 316
 Treatment Plan Approval Status Report, 318
 UDS - Age/Gender Report, 322
 UDS - Encounters and Users by Selected Procedure Codes Report, 326
 UDS - Encounters by Provider Report, 328
 UDS - Insurance Financial Class Report, 330
 UDS - Insurance Financial Class Report (2013), 332
 UDS - Medicaid/Medicare Report, 334
 UDS - Patient Related Revenue Report, 336
 UDS - Patient Status Report, 338
 UDS - Sealant Statistics Report, 340
 UDS - Tobacco Use and Intervention Report, 342
 Unscheduled Appointment List (DX1), 344
 Unscheduled Treatment Plans (Condensed) Report, 348
 Unscheduled Treatment Plans (Detailed) Report, 350
 Utilization Report, 354

Dates (for Appointment Notes)

Patient Notes Report, 208

Dates (for Clinical Notes)

Patient Notes Report, 208

Dates (for Patient Alert Notes)

Patient Notes Report, 208

Dates (for Perio Exam Notes)

Patient Notes Report, 208

Days Past Due

Aging/Credit Balance Report, 6

Days Referred Out

Referred To Doctor Report, 292

Display Allocate Date for Payments

Insurance Transaction Analysis Report, 148

Due Dates

Continuing Care Cards - No Appointment, 74

Continuing Care Display List, 76

Employers

Employers and Employed Patients Report, 116

Insurance Eligibility Report, 146

Letter Merge Reports, 152

Treatment Plan Approval Report, 316

Treatment Plan Approval Status Report, 318

Encounter Numbers

Clinical Notes Report, 64

Ethnicities

UDS - Patient Status Report, 338

Ethnicity

Patient List (Filtered), 206

Exclude Chart-Pulled Appointments

Daily Appointment List (DX1), 84

Daily Appointment List Report, 86

Exclude Non-referred Procedures

Unscheduled Treatment Plans (Condensed) Report, 348

Unscheduled Treatment Plans (Detailed) Report, 350

Exclude Referred by Procedures

Unscheduled Treatment Plans (Condensed) Report, 348

Unscheduled Treatment Plans (Detailed) Report, 350

Exclude Referred to Procedures

Unscheduled Treatment Plans (Condensed) Report, 348

Unscheduled Treatment Plans (Detailed) Report, 350

Exclude RVU Fees Equal to Zero

RVU Day Sheet Report, 296

Existing Patients with Appointment in Date Range

Continuing Care Cards - with Appointment, 75

Existing Patients with Appointments in Date Range

Letter Merge Reports, 152

Existing Patients with no Appointments in Date Range

Letter Merge Reports, 152

Existing Procedures

Letter Merge Reports, 152

Expiration Dates

Patient Treatment Case Report, 218

Practice Treatment Case Report, 248

Families

Patient Information Accessed Report, 200

Fee Schedule

Fee Schedules Report, 122

Utilization Report, 354

Fee Schedules

UDS - Patient Related Revenue Report, 336

Financial Classes

Insurance Carrier List, 132

Insurance Carrier Production - Full Report, 136

Insurance Carrier Production - Summary Report, 138

Insurance Transaction Analysis Report, 148

UDS - Insurance Financial Class Report, 330

UDS - Insurance Financial Class Report (2013), 332

UDS - Medicaid/Medicare Report, 334

UDS - Patient Related Revenue Report, 336

First Transaction Date

Family Ledger Report, 118

Family Ledger Report (Single Family), 120

Patient Ledger Report, 202

First Visit Dates

Letter Merge Reports, 152

New Patient List, 184

Referral Analysis Report, 282

Gender

Patient List (Filtered), 206

Gender Identities

UDS - Patient Status Report, 338

Guarantors

Aging/Credit Balance Report, 6

Billing Statement, 48

Collections Manager List, 70

Family Ledger Report, 118

Future Due Payment Plan Report - Monthly Totals, 126

Future Due Payment Plan Report - Standard, 128

Payment Agreement Report, 224

Provider Revenue - Allocations Report, 274

Provider Revenue - Charges Report, 276

Provider Revenue - Credits Report, 278

Provider Revenue - Summary Report, 280

Suspended Credits Report, 312

Health Insurances

UDS - Patient Status Report, 338

Height/Length and Weight

Meaningful Use Measure Calculation List, 156

Homeless Status

Patient List (Filtered), 206

UDS - Patient Status Report, 338

Housing Statuses

UDS - Patient Status Report, 338

ICD-10CM Codes

Medical Code List, 180

ICD-9CM Codes

Medical Code List, 180

ICD-9-CM Diagnostic Codes

Patient List (Filtered), 206

If not Billed since Date

Billing Statement, 48

Include Adjustment Type List

Provider A/R Totals - Daily Report, 264

Provider A/R Totals - Standard Report, 266

Include Age Groups (as of June 30th)

UDS - Insurance Financial Class Report (2013), 332

UDS - Medicaid/Medicare Report, 334

Include All Patients

Insurance Carrier List, 132

Include All Procedures

RVU Utilization Report, 304

Utilization Report, 354

Include All Referral Sources

Referred By Doctor/Other Report, 288
 Referred To Doctor Report, 292

Include Appointment Break Reason

Unscheduled Appointment List (DX1), 344

Include Charge Adjustments

Insurance Transaction Analysis Report, 148

Include Charges

Insurance Transaction Analysis Report, 148

Include Completed Procedures Only

Initial Health History Report, 130
 Oral Health Education Report, 192
 Periodontal Exam Report, 240

Include Credit Adjustments

Insurance Transaction Analysis Report, 148

Include Detail

Initial Health History Report, 130
 Oral Health Education Report, 192
 Periodontal Exam Report, 240

Include Employees

Employers and Employed Patients Report, 116

Include Grand Totals

Insurance Transaction Analysis Report, 148

Include Guarantor Notes

Aging/Credit Balance Report, 6

Include Insurance Payments

Insurance Transaction Analysis Report, 148

Include Only Procedures in Coverage Table

RVU Utilization Report, 304
 Utilization Report, 354

Include Patient Detail

Production Summary Report, 260
 RVU Production Summary Report, 298

Include Patient Info

UDS - Age/Gender Report, 322
 UDS - Encounters and Users by Selected Procedure Codes Report, 326
 UDS - Encounters by Provider Report, 328
 UDS - Insurance Financial Class Report, 330
 UDS - Insurance Financial Class Report (2013), 332
 UDS - Medicaid/Medicare Report, 334
 UDS - Patient Related Revenue Report, 336
 UDS - Patient Status Report, 338
 UDS - Sealant Statistics Report, 340
 UDS - Tobacco Use and Intervention Report, 342

Include Patient Payments

Insurance Transaction Analysis Report, 148

Include Patients in Numerator Only if Exist in**Denominator**

Initial Health History Report, 130
 Oral Health Education Report, 192
 Periodontal Exam Report, 240

Include Patients without Production

Referred To Doctor Report, 292

Include Primary Claims not Received

Secondary Insurance Claims Not Created Report, 306

Include Primary Pre-treatment Estimates Not Received

Secondary Pre-Treatment Estimates Not Created Report, 308

Include Procedures

RVU Day Sheet Report, 296

Include Provider IDs

Insurance Carrier List, 132

Include Quaternary Claims

Insurance Transaction Analysis Report, 148

Include Refunds

Credit Card Transaction Report, 80

Include Secondary Claims

Insurance Transaction Analysis Report, 148

Include Subscribers

Insurance Carrier List, 132

Include Subtotals by Carrier

Insurance Transaction Analysis Report, 148

Include Suspended Payments and Adjustments

UDS - Patient Related Revenue Report, 336

Include Tertiary Claims

Insurance Transaction Analysis Report, 148

Include Voids

Credit Card Transaction Report, 80

In-operative Appointment Statuses

Appointment Cycle Time Report, 16

Insurance Carriers

Dental Encounters Report, 106
 Insurance Carrier List, 132
 Insurance Carrier Production - Full Report, 136
 Insurance Carrier Production - Summary Report, 138
 Insurance Claim Aging Report, 140
 Insurance Claims Not Sent Report, 142
 Insurance Eligibility Report, 146
 Insurance Transaction Analysis Report, 148
 Letter Merge Reports, 152
 Pre-Treatment Estimate Aging Report, 252
 Pre-Treatment Estimates Not Sent Report, 254
 Provider IDs List, 272
 RVU Utilization Report, 304
 Secondary Insurance Claims Not Created Report, 306
 Secondary Pre-Treatment Estimates Not Created Report, 308
 Treatment Plan Approval Report, 316
 Treatment Plan Approval Status Report, 318
 Updated Dental Insurance Payment Table Report, 352
 Utilization Report, 354

Insurance Minimum Days Past Due

Collections Manager List, 70

Insurance Plan Totals Only

RVU Utilization Report, 304
 Utilization Report, 354

Insurance Type

Insurance Carrier List, 132
 Insurance Carrier Production - Full Report, 136
 Insurance Carrier Production - Summary Report, 138
 Insurance Claim Aging Report, 140
 Insurance Claims Not Sent Report, 142
 Insurance Transaction Analysis Report, 148
 Pre-Treatment Estimate Aging Report, 252
 Pre-Treatment Estimates Not Sent Report, 254
 Procedures Not Attached to Insurance Report, 258
 Secondary Insurance Claims Not Created Report, 306

Insurance Types

- Provider IDs List, 272
- UDS - Insurance Financial Class Report (2013), 332

Laboratory Test Results

- Patient List (Filtered), 206

Language

- Patient List (Filtered), 206

Languages

- UDS - Patient Status Report, 338

Last Payment Before Date

- Aging/Credit Balance Report, 6
- Collections Manager List, 70

Last Payment Plan Payment Dates

- Letter Merge Reports, 152

Last Referral Dates

- Letter Merge Reports, 152

Last Visit Before Date

- Patient List, 204

Last Visit Dates

- Continuing Care Display List, 76
- Letter Merge Reports, 152

Maximum Appointment Status Duration (Cap)

- Appointment Statistics Report, 20

Maximum Duration of Appointments in Status Range (Cap)

- Appointment Statistics Report, 20

Meaningful Use Stages

- Meaningful Use Measure Calculation List, 156

Medical Alerts

- Letter Merge Reports, 152
- Patient List (Filtered), 206

Medications

- Letter Merge Reports, 152
- Patient List (Filtered), 206

Minimum Balance

- Collections Manager List, 70

Minimum Balance to Bill

- Billing Statement, 48

Minimum Days Past Due

- Collections Manager List, 70
- Insurance Claim Aging Report, 140
- Pre-Treatment Estimate Aging Report, 252

Modifier Codes

- Medical Code List, 180

Modules

- Patient Information Accessed Report, 200

Multi-Codes

- Multi-Code List, 182

N/A

- Appointment Reminder Cards, 18
- Coupon Book - Future Due Payments, 78
- Coupon Book - Payment Agreements, 79
- Custom Practice Information Report, 82
- Dental Diagnostic Code List, 104
- Document Center Document, 112
- Document Center List, 114
- Insurance Coverage Tables Report, 144
- Office Journal Report, 186
- Operator Day Sheet Report, 188
- Patient Chart and Progress Notes Printout, 194
- Patient Chart Printout, 196

Patient Proposed Treatment Case Report (Your Care Plan), 212

Patient Questionnaire, 214

Patient Route Slip, 216

Patient's Ledger Report, 220

Payment Agreement Amortization Schedule, 222

Perio - Combined Graphic & Data Chart Report, 228

Perio - Data Chart Report, 230

Perio - Exam Comparison Report, 232

Perio - Graphic Chart Report, 234

Perio - Pocket Depths Only Report, 236

Prescription Printout, 250

Referral Slip, 286

Registration Information Report, 294

Truth in Lending Disclosure Statement, 320

Walkout - Doctor's Statement, 356

Walkout - Family Walkout, 358

New Patient Statistics

- Practice Statistics Report, 246

No Continuing Care and no Future Appointments

- Patient List, 204

No Insurance Coverage

- Letter Merge Reports, 152

Not Billed Since Date

- Collections Manager List, 70

Note Texts

- Letter Merge Reports, 152

Number of Missed Payments

- Collections Manager List, 70

Number of Payments Missed

- Payment Agreement Report, 224

Only Bill Aged Accounts

- Billing Statement, 48

Only Guarantors

- Letter Merge Reports, 152
- Patient Notes Report, 208

Only Search for Procedures that Have Had a Pre-treatment Estimate Created

- Treatment Plan Approval Status Report, 318

Operatories

- Appointment Book View Printout, 14
- Audit Report - Appointments, 26
- Daily Appointment List (DX1), 84
- Daily Appointment List Report, 86
- Operatory Appointment List Report, 190

Operators

- Credit Card Transaction Report, 80
- Day Sheet (Charges and Receipts) Report, 94
- Deposit Slip, 108

Patient Gender

- Letter Merge Reports, 152

Patient Marital Status

- Letter Merge Reports, 152

Patient Names

- Letter Merge Reports, 152

Patient Statistics

- Practice Statistics Report, 246

Patient Status

- Letter Merge Reports, 152

Patient Statuses

- Patient List, 204

Patient Tags

Adjustment Summary Report, 4
 Aging/Credit Balance Report, 6
 Analysis Summary Report - Daily, 8
 Analysis Summary Report - Standard, 12
 Appointment Cycle Time Report, 16
 As Soon As Possible List, 22
 Audit Report - Appointments, 26
 Audit Report - Combined, 32
 Audit Report - Patients, 34
 Audit Report - Transactions, 38
 Birthday List, 50
 Clinical Notes Report, 64
 Credit Card Transaction Report, 80
 Daily Appointment List (DX1), 84
 Daily Summary Report, 88
 Day Sheet (Adjustments) Report, 90
 Day Sheet (Receipts) Report, 98
 Day Sheet Report, 100
 Dental Encounters Report, 106
 Deposit Slip, 108
 Finance Charge Report, 124
 Initial Health History Report, 130
 Insurance Carrier Production - Full Report, 136
 Insurance Carrier Production - Summary Report, 138
 Insurance Claim Aging Report, 140
 Insurance Claims Not Sent Report, 142
 Insurance Transaction Analysis Report, 148
 Late Charge Report, 150
 Oral Health Education Report, 192
 Patient Health Assessment Report, 198
 Patient Information Accessed Report, 200
 Patient List, 204
 Payment Summary Report, 226
 Periodontal Exam Report, 240
 Pre-Treatment Estimate Aging Report, 252
 Pre-Treatment Estimates Not Sent Report, 254
 Procedures Not Attached to Insurance Report, 258
 Production Summary Report, 260
 Provider Revenue - Allocations Report, 274
 Provider Revenue - Charges Report, 276
 Provider Revenue - Credits Report, 278
 Provider Revenue - Summary Report, 280
 Referral Analysis Report, 282
 RVU Day Sheet Report, 296
 RVU Production Summary Report, 298
 RVU Utilization Report, 304
 Secondary Insurance Claims Not Created Report, 306
 Secondary Pre-Treatment Estimates Not Created Report, 308
 Suspended Credits Report, 312
 UDS - Age/Gender Report, 322
 UDS - Encounters and Users by Selected Procedure Codes Report, 326
 UDS - Encounters by Provider Report, 328
 UDS - Insurance Financial Class Report (2013), 332
 UDS - Patient Status Report, 338
 Unscheduled Appointment List (DX1), 344
 Utilization Report, 354

Patients

Audit Report - Appointments, 26
 Audit Report - Combined, 32

Audit Report - Patients, 34
 Audit Report - Transactions, 38
 Birthday List, 50
 Clinical Notes Report, 64
 Daily Appointment List (DX1), 84
 Daily Appointment List Report, 86
 Dental Encounters Report, 106
 Insurance Carrier Production - Full Report, 136
 Insurance Carrier Production - Summary Report, 138
 Insurance Claim Aging Report, 140
 Insurance Claims Not Sent Report, 142
 Insurance Eligibility Report, 146
 New Patient List, 184
 Operatory Appointment List Report, 190
 Patient Health Assessment Report, 198
 Patient Information Accessed Report, 200
 Patient Ledger Report, 202
 Patient List, 204
 Patient Notes Report, 208
 Perio Exam List, 238
 Practice Treatment Case Report, 248
 Pre-Treatment Estimate Aging Report, 252
 Pre-Treatment Estimates Not Sent Report, 254
 Procedures Not Attached to Insurance Report, 258
 Referral Recap Report, 284
 Secondary Insurance Claims Not Created Report, 306
 Secondary Pre-Treatment Estimates Not Created Report, 308
 Treatment Plan Approval Report, 316
 Treatment Plan Approval Status Report, 318
 Unscheduled Treatment Plans (Condensed) Report, 348
 Unscheduled Treatment Plans (Detailed) Report, 350

Patients with No Production or Treatment-planned Procedures

Referred By Doctor/Other Report, 288

Pay To Provider

Insurance Transaction Analysis Report, 148

Payment Agreement Dates

Payment Agreement Report, 224

Payment Agreement Intervals

Payment Agreement Report, 224

Payment Plan Balances

Letter Merge Reports, 152

Payment Types

Daily Summary Report, 88
 Day Sheet (Receipts) Report, 98
 Deposit Slip, 108
 Payment Summary Report, 226
 Provider Revenue - Allocations Report, 274
 Provider Revenue - Charges Report, 276
 Provider Revenue - Credits Report, 278
 Provider Revenue - Summary Report, 280

Pending Claims

Collections Manager List, 70

Place of Service Codes

Medical Code List, 180

Poverty Level

Patient List (Filtered), 206
 UDS - Patient Status Report, 338

Preferred Contact Method

Patient List (Filtered), 206

Prescriptions

Patient List (Filtered), 206

Previous Office Journal Entry Before Date

Collections Manager List, 70

Previous Payment Due Date

Payment Agreement Report, 224

Primary Insurance Coverage

Letter Merge Reports, 152

Primary Provider

Patient List (Filtered), 206

Primary Providers

As Soon As Possible List, 22

Billing Statement, 48

Unscheduled Treatment Plans (Condensed) Report, 348

Unscheduled Treatment Plans (Detailed) Report, 350

Prior Treatment Dates

Continuing Care Display List, 76

Privacy Requests for no Correspondence for Patients and Guarantors

Letter Merge Reports, 152

Privacy Requests for no Correspondence for Referred by Patients

Letter Merge Reports, 152

Procedure Categories

RVU Production Summary Report, 298

Procedure Codes

Procedure Code List, 256

Procedure Dates

Dental Encounters Report, 106

Letter Merge Reports, 152

Patient Treatment Case Report, 218

Practice Treatment Case Report, 248

Procedures

Treatment Plan Approval Status Report, 318

Production Categories

Production Summary Report, 260

Production Dates

Referred By Doctor/Other Report, 288

Referred By Patient Report, 290

Prophy Types

Practice Statistics Report, 246

Prospective Patients with Appointments in Date Range

Letter Merge Reports, 152

Provider Statistics

Practice Statistics Report, 246

Providers

Adjustment Summary Report, 4

Aging/Credit Balance Report, 6

Analysis Summary Report - Daily, 8

Analysis Summary Report - Standard, 12

Appointment Book View Printout, 14

Audit Report - Providers/Staff, 36

Birthday List, 50

Clinical Notes Report, 64

Clinical Quality Measures List, 66

Collections Manager List, 70

Continuing Care Display List, 76

Daily Appointment List (DX1), 84

Daily Appointment List Report, 86

Day Sheet (Adjustments) Report, 90

Day Sheet (Charges and Receipts) Report, 94

Day Sheet (Receipts) Report, 98

Day Sheet Report, 100

Dental Encounters Report, 106

Employers and Employed Patients Report, 116

Family Ledger Report, 118

Finance Charge Report, 124

Future Due Payment Plan Report - Monthly Totals, 126

Future Due Payment Plan Report - Standard, 128

Initial Health History Report, 130

Insurance Carrier Production - Full Report, 136

Insurance Carrier Production - Summary Report, 138

Insurance Claim Aging Report, 140

Insurance Claims Not Sent Report, 142

Insurance Eligibility Report, 146

Insurance Transaction Analysis Report, 148

Late Charge Report, 150

Letter Merge Reports, 152

Meaningful Use Measure Calculation List, 156

New Patient List, 184

Operatory Appointment List Report, 190

Oral Health Education Report, 192

Patient Ledger Report, 202

Patient List, 204

Patient Notes Report, 208

Patient Treatment Case Report, 218

Payment Agreement Report, 224

Payment Summary Report, 226

Periodontal Exam Report, 240

Practice Analysis Report, 242

Practice Organization List, 244

Practice Statistics Report, 246

Practice Treatment Case Report, 248

Pre-Treatment Estimate Aging Report, 252

Pre-Treatment Estimates Not Sent Report, 254

Procedures Not Attached to Insurance Report, 258

Production Summary Report, 260

Provider A/R Totals - Daily Report, 264

Provider A/R Totals - Standard Report, 266

Provider IDs List, 272

Provider Revenue - Allocations Report, 274

Provider Revenue - Charges Report, 276

Provider Revenue - Credits Report, 278

Provider Revenue - Summary Report, 280

Referral Analysis Report, 282

Referral Recap Report, 284

Referred By Doctor/Other Report, 288

Referred By Patient Report, 290

Referred To Doctor Report, 292

RVU Day Sheet Report, 296

RVU Production Summary Report, 298

RVU Utilization Report, 304

Secondary Insurance Claims Not Created Report, 306

Secondary Pre-Treatment Estimates Not Created Report, 308

Treatment Plan Approval Report, 316

Treatment Plan Approval Status Report, 318

UDS - Age/Gender Report, 322

UDS - Encounters and Users by Selected Procedure Codes Report, 326

UDS - Encounters by Provider Report, 328

- UDS - Insurance Financial Class Report, 330
- UDS - Insurance Financial Class Report (2013), 332
- UDS - Patient Related Revenue Report, 336
- UDS - Patient Status Report, 338
- UDS - Tobacco Use and Intervention Report, 342
- Unscheduled Appointment List (DX1), 344
- Unscheduled Appointment List (OM), 346
- Utilization Report, 354
- Race**
 - Patient List (Filtered), 206
- Races**
 - UDS - Patient Status Report, 338
- Refer to Doctors**
 - Referred To Doctor Report, 292
- Referral Dates**
 - Referred By Doctor/Other Report, 288
 - Referred By Patient Report, 290
 - Referred To Doctor Report, 292
- Referral Sources**
 - Referral Recap Report, 284
- Referral Status**
 - Referred To Doctor Report, 292
- Referred by Dates**
 - Letter Merge Reports, 152
- Referred by Doctor/Other**
 - Letter Merge Reports, 152
- Referred by Patient**
 - Letter Merge Reports, 152
- Referred by Sources**
 - Letter Merge Reports, 152
- Referred to Dates**
 - Letter Merge Reports, 152
- Referred to Names**
 - Letter Merge Reports, 152
- Referring Doctors/Others**
 - Referred By Doctor/Other Report, 288
- Referring Patients**
 - Referred By Patient Report, 290
- Religion**
 - Patient List (Filtered), 206
- Religions**
 - UDS - Patient Status Report, 338
- Remaining Balances**
 - Payment Agreement Report, 224
- Remaining Insurance Benefit Amounts**
 - Letter Merge Reports, 152
- Remaining Number of Payments**
 - Payment Agreement Report, 224
- Rendering Clinics**
 - Adjustment Summary Report, 4
 - Payment Summary Report, 226
 - Provider A/R Totals - Daily Report, 264
 - Provider A/R Totals - Standard Report, 266
 - Provider Revenue - Allocations Report, 274
 - Provider Revenue - Charges Report, 276
 - Provider Revenue - Credits Report, 278
 - Provider Revenue - Summary Report, 280
- Rights**
 - Assigned Rights Report, 24
 - Audit Rights Report - Assigned Individually, 40
 - Audit Rights Report - Assigned to Groups, 42
- RVU Schedule**
 - RVU Utilization Report, 304
- RVU Schedules**
 - RVU Schedules Report, 302
- Scheduled Appointment**
 - Continuing Care Display List, 76
- Sealant Codes**
 - UDS - Sealant Statistics Report, 340
- Sealant Ineligibility Codes**
 - UDS - Sealant Statistics Report, 340
- Search as Date Range**
 - Birthday List, 50
- Secondary Insurance Coverage**
 - Letter Merge Reports, 152
- Separate Totals for Medicaid and Non-Medicaid Patients**
 - Production Summary Report, 260
- Sexual Orientations**
 - UDS - Patient Status Report, 338
- Show Open Claims Only**
 - Insurance Claim Aging Report, 140
- Skip Account with Claim Pending**
 - Billing Statement, 48
- Skip Accounts with Claim Pending if Patient Portion Less than Amount**
 - Billing Statement, 48
- Skip Non-persons**
 - Referred By Doctor/Other Report, 288
- Staff**
 - Analysis Summary Report - Daily, 8
 - Analysis Summary Report - Standard, 12
 - Audit Report - Providers/Staff, 36
 - Birthday List, 50
 - Clinical Notes Report, 64
 - Day Sheet Report, 100
 - Employers and Employed Patients Report, 116
 - Finance Charge Report, 124
 - Insurance Claims Not Sent Report, 142
 - Late Charge Report, 150
 - Practice Analysis Report, 242
 - Practice Organization List, 244
 - Practice Statistics Report, 246
 - Pre-Treatment Estimate Aging Report, 252
 - Pre-Treatment Estimates Not Sent Report, 254
 - Procedures Not Attached to Insurance Report, 258
 - Production Summary Report, 260
 - Provider IDs List, 272
 - RVU Day Sheet Report, 296
 - RVU Production Summary Report, 298
 - RVU Utilization Report, 304
 - Secondary Insurance Claims Not Created Report, 306
 - UDS - Patient Related Revenue Report, 336
 - Utilization Report, 354
- Starting Treatment Plan Amount**
 - Treatment Plan Approval Report, 316
 - Treatment Plan Approval Status Report, 318
- Subtract Lab Expenses**
 - RVU Day Sheet Report, 296
 - RVU Production Summary Report, 298
- Time**
 - Appointment Book View Printout, 14

Time Zone

- Appointment Statistics Report, 20
- As Soon As Possible List, 22
- Audit Report - Appointments, 26
- Audit Report - Audit Log Status, 28
- Audit Report - Clinics, 30
- Audit Report - Combined, 32
- Audit Report - Patients, 34
- Audit Report - Providers/Staff, 36
- Audit Report - Transactions, 38
- Audit Rights Report - Assigned Individually, 40
- Audit Rights Report - Assigned to Groups, 42
- Audit Rights Report - Group Names, 44
- Audit Rights Report - Users to Groups, 46
- Clinical Notes Report, 64
- Daily Summary Report, 88
- Patient Information Accessed Report, 200
- Unscheduled Appointment List (DX1), 344

Treatment Dates

- Referral Analysis Report, 282

Treatment Plan Providers

- Unscheduled Treatment Plans (Condensed) Report, 348
- Unscheduled Treatment Plans (Detailed) Report, 350

Treatment-planned Procedures

- Letter Merge Reports, 152

Type of Service Codes

- Medical Code List, 180

Unique Patient Count

- RVU Day Sheet Report, 296

Unique Visit Count

- RVU Day Sheet Report, 296

Unscheduled Appointment

- Continuing Care Display List, 76

Unscheduled Appointment Dates

- Unscheduled Appointment List (OM), 346

User Defined Category

- Patient List (Filtered), 206

User Groups

- Audit Rights Report - Group Names, 44
- Audit Rights Report - Users to Groups, 46

User-defined Category

- UDS - Patient Status Report, 338

Users

- Assigned Rights Report, 24
- Audit Report - Audit Log Status, 28
- Audit Rights Report - Assigned Individually, 40
- Audit Rights Report - Assigned to Groups, 42
- Audit Rights Report - Users to Groups, 46

Users Changed

- Audit Report - Appointments, 26
- Audit Report - Clinics, 30
- Audit Report - Combined, 32
- Audit Report - Patients, 34
- Audit Report - Providers/Staff, 36
- Audit Report - Transactions, 38
- Audit Rights Report - Assigned Individually, 40
- Audit Rights Report - Assigned to Groups, 42
- Audit Rights Report - Group Names, 44
- Audit Rights Report - Users to Groups, 46
- Patient Information Accessed Report, 200

Veteran Status

- Patient List (Filtered), 206
- UDS - Patient Status Report, 338

Visit Codes

- UDS - Sealant Statistics Report, 340

Visits

- Treatment Case Report, 314

With a Medical Claim (Received)

- Procedures Not Attached to Insurance Report, 258

With a Medical Claim (Sent or Received)

- Procedures Not Attached to Insurance Report, 258

With a Medical Claim (Sent)

- Procedures Not Attached to Insurance Report, 258

With or Without a Medical Claim

- Procedures Not Attached to Insurance Report, 258

Without a Medical Claim

- Procedures Not Attached to Insurance Report, 258

Worker Status

- Patient List (Filtered), 206
- UDS - Patient Status Report, 338

ZIP Code Statistics

- Practice Statistics Report, 246

ZIP Codes

- Letter Merge Reports, 152
- UDS - Patient Status Report, 338

Index by Report Item

(Arranged in Categories)

Abbreviated Description

ADA Code Abbreviated Description		Account Balance Amount Aged 121 - 150	
Procedure Code List	256	Pre-Treatment Estimate Aging Report	252
Multi-Code List	182	Account Balance Amount Aged 151 - 180	
Vaccine Abbreviated Description		Pre-Treatment Estimate Aging Report	252
Patient List (Filtered)	206	Account Balance Amount Aged 31 - 60	
		Pre-Treatment Estimate Aging Report	252
Accepted		Account Balance Amount Aged 61 - 90	
Percent of Accepted Cases		Pre-Treatment Estimate Aging Report	252
Practice Treatment Case Report	248	Account Balance Amount Aged 91 - 120	
		Pre-Treatment Estimate Aging Report	252
Access		Account Clinic	
Clinic of Access		Collections Manager List	70
Patient Information Accessed Report	200	Account Estimated Insurance Portion	
Date of Access		Patient Route Slip	216
Patient Information Accessed Report	200	Account Holder Name	
Module of Access		Deposit Slip	108
Patient Information Accessed Report	200	Account Note	
Number of Patients Provided API Access to Electronic Health Information		Collections Manager List	70
Meaningful Use Measure Calculation List	156	Account Provider	
Number of Patients Provided Timely Online Access to Electronic Health Information		Collections Manager List	70
Meaningful Use Measure Calculation List	156	Account Suspended Credit Amount	
Number of Patients who Accessed Electronic Health Information with API		Patient Route Slip	216
Meaningful Use Measure Calculation List	156	Amount of Account Balance Aged >90	
Status of Access		Insurance Claim Aging Report	140
Patient Information Accessed Report	200	Amount of Account Balance Aged 1 - 30	
Time of Access		Insurance Claim Aging Report	140
Patient Information Accessed Report	200	Amount of Account Balance Aged 31 - 60	
		Insurance Claim Aging Report	140
Accessed		Amount of Account Balance Aged 61 - 90	
Accessed Patient Information		Insurance Claim Aging Report	140
Audit Report - Combined	32	Bank Account Number	
		Deposit Slip	108
Account		Audit Report - Clinics	30
Account Amount Aged >90		Bank Account Number Change	
Patient Route Slip	216	Audit Report - Clinics	30
Account Amount Aged 0 - 30		Current Account Balance	
Patient Route Slip	216	Billing Statement	48
Account Amount Aged 181+		Ledger Balance	
Pre-Treatment Estimate Aging Report	252	Suspended Credits Report	312
Account Amount Aged 31 - 60		Prior Account Balance	
Patient Route Slip	216	Walkout - Family Walkout	358
Account Amount Aged 61 - 90		Total Account Balance	
Patient Route Slip	216	Insurance Claim Aging Report	140
Account Balance		Billing Statement	48
Collections Manager List	70	Total Amount of Account Bal	
Family Ledger Report	118	Collections Manager List	70
Family Ledger Report (Single Family)	120	Payment Agreement Report	224
Insurance Claim Aging Report	140	Aging/Credit Balance Report	6
Letter Merge Reports	152	Total Amount of Account Balances Aged 1 - 30 for Pre-treatment Estimates	
Patient Route Slip	216	Pre-Treatment Estimate Aging Report	252
Patient's Ledger Report	220	Total Amount of Account Balances Aged 1 - 30 for Primary Pre-treatment Estimates	
Payment Agreement Report	224	Pre-Treatment Estimate Aging Report	252
Pre-Treatment Estimate Aging Report	252		
Aging/Credit Balance Report	6		

Account (continued)

Total Amount of Account Balances Aged 1 - 30 for Secondary Pre-treatment Estimates		Total Amount of Account Balances Aged 181+ with Claims	
Pre-Treatment Estimate Aging Report	252	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 1 - 30 with Claims		Total Amount of Account Balances Aged 181+ with Primary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 1 - 30 with Primary Claims		Total Amount of Account Balances Aged 181+ with Secondary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 1 - 30 with Secondary Claims		Total Amount of Account Balances Aged 31 - 60 for Pre-treatment Estimates	
Insurance Claim Aging Report	140	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 121 - 150 for Pre-treatment Estimates		Total Amount of Account Balances Aged 31 - 60 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 121 - 150 for Primary Pre-treatment Estimates		Total Amount of Account Balances Aged 31 - 60 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 121 - 150 for Secondary Pre-treatment Estimates		Total Amount of Account Balances Aged 31 - 60 with Claims	
Pre-Treatment Estimate Aging Report	252	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 121 - 150 with Claims		Total Amount of Account Balances Aged 31 - 60 with Primary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 121 - 150 with Primary Claims		Total Amount of Account Balances Aged 31 - 60 with Secondary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 121 - 150 with Secondary Claims		Total Amount of Account Balances Aged 61 - 90 for Pre-treatment Estimates	
Insurance Claim Aging Report	140	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 151 - 180 for Pre-treatment Estimates		Total Amount of Account Balances Aged 61 - 90 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 151 - 180 for Primary Pre-treatment Estimates		Total Amount of Account Balances Aged 61 - 90 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 151 - 180 for Secondary Pre-treatment Estimates		Total Amount of Account Balances Aged 61 - 90 with Claims	
Pre-Treatment Estimate Aging Report	252	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 151 - 180 with Claims		Total Amount of Account Balances Aged 61 - 90 with Primary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 151 - 180 with Primary Claims		Total Amount of Account Balances Aged 61 - 90 with Secondary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 151 - 180 with Secondary Claims		Total Amount of Account Balances Aged 91 - 120 for Pre-treatment Estimates	
Insurance Claim Aging Report	140	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 181+ for Pre-treatment Estimates		Total Amount of Account Balances Aged 91 - 120 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 181+ for Primary Pre-treatment Estimates		Total Amount of Account Balances Aged 91 - 120 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 181+ for Secondary Pre-treatment Estimates		Total Amount of Account Balances Aged 91 - 120 with Claims	
Pre-Treatment Estimate Aging Report	252	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 181+ for Primary Claims		Total Amount of Account Balances Aged 91 - 120 with Primary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 181+ for Secondary Claims			

Account (continued)

Total Amount of Account Balances Aged 91 - 120 with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances with Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances with Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances with Primary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances with Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances with Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252

Account Holder

Account Holder Name	
Deposit Slip	108

Accounts Receivable

Current Receivables	
Practice Analysis Report	242
Percent of Receivables	
Practice Analysis Report	242
Receivables Aged 31 - 60	
Practice Analysis Report	242
Receivables Aged 61 - 90	
Practice Analysis Report	242
Receivables Aged Over 90	
Practice Analysis Report	242
Total Receivables	
Practice Analysis Report	242

Active

Number of Active Patient Guarantors	
Practice Statistics Report	246
Number of Active Patients	
Practice Statistics Report	246
Practice Analysis Report	242
Number of Insured Active Patients	
Practice Analysis Report	242
Percent of Active Patient Guarantors	
Practice Statistics Report	246
Percent of Active Patients	
Practice Statistics Report	246
Total Active New Patients	
New Patient List	184

ADA Code

ADA Code	
Day Sheet (Charges and Receipts) Report	94
Dental Encounters Report	106
Fee Schedules Report	122
Insurance Carrier Production - Full Report	136
Multi-Code List	182
Operator Day Sheet Report	188
Patient Chart and Progress Notes Printout	194
Patient List (Filtered)	206
Patient Treatment Case Report	218

Practice Treatment Case Report	248
Procedure Code List	256
Procedures Not Attached to Insurance Report	258
Production Summary Report	260
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Provider Revenue - Allocations Report	274
Provider Revenue - Charges Report	276
Provider Revenue - Credits Report	278
RVU Day Sheet Report	296
RVU Production Summary Report	298
RVU Schedules Report	302
RVU Utilization Report	304
Standard Coverage Tables Report	310
Treatment Case Report	314
Treatment Plan Approval Report	316
Treatment Plan Approval Status Report	318
Unscheduled Treatment Plans (Detailed) Report	350
Updated Dental Insurance Payment Table Report	352
Utilization Report	354
Walkout - Doctor's Statement	356
Appointment Cycle Time Report	16
ADA Code Abbreviated Description	
Procedure Code List	256
Multi-Code List	182
ADA Code Description	
Fee Schedules Report	122
Insurance Carrier Production - Full Report	136
Multi-Code List	182
Patient Chart and Progress Notes Printout	194
Patient Ledger Report	202
Patient Treatment Case Report	218
Practice Treatment Case Report	248
Procedure Code List	256
Procedures Not Attached to Insurance Report	258
Production Summary Report	260
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Provider Revenue - Allocations Report	274
Provider Revenue - Charges Report	276
Provider Revenue - Credits Report	278
RVU Day Sheet Report	296
RVU Production Summary Report	298
RVU Schedules Report	302
RVU Utilization Report	304
Treatment Case Report	314
Treatment Plan Approval Report	316
Treatment Plan Approval Status Report	318
Unscheduled Treatment Plans (Detailed) Report	350
Utilization Report	354
Walkout - Doctor's Statement	356
Walkout - Family Walkout	358
Day Sheet (Charges and Receipts) Report	94
ADA Code Description for Today's Completed Work	
Patient Chart Printout	196
ADA Code Description for Treatment-planned Procedure	
Patient Chart Printout	196

ADA Code (continued)

ADA Code Description of Completed Treatment	
Referral Recap Report	284
ADA Code Description of Treatment Still in Progress	
Referral Recap Report	284
ADA Code Description of Treatment-planned Procedure	
Referral Slip	286
ADA Code Description or Transaction Description	
Operator Day Sheet Report	188
ADA Code of Completed Treatment	
Referral Recap Report	284
ADA Code of Treatment Still in Progress	
Referral Recap Report	284
ADA Code of Treatment-planned Procedure	
Referral Slip	286
Alternate ADA Code	
Procedure Code List	256
Insurance Carrier List	132
Beginning ADA Code	
Insurance Coverage Tables Report	144
Denominator Codes for Provider	
Oral Health Education Report	192
Periodontal Exam Report	240
Initial Health History Report	130
Next Appointment ADA Code	
Patient Route Slip	216
Next Appointment ADA Code Description	
Patient Route Slip	216
Numerator Codes for Provider	
Oral Health Education Report	192
Periodontal Exam Report	240
Initial Health History Report	130
Paint Type	
Procedure Code List	256
Dental Diagnostic Code List	104
Procedure Code Category	
Standard Coverage Tables Report	310
Insurance Coverage Tables Report	144
Replace Initial Zero of Procedure Code on Claims	
Insurance Carrier List	132
Time Units	
Procedure Code List	256
Multi-Code List	182
Total Denominator Codes for All Clinics	
Oral Health Education Report	192
Periodontal Exam Report	240
Initial Health History Report	130
Total Denominator Codes for Clinic	
Oral Health Education Report	192
Periodontal Exam Report	240
Initial Health History Report	130
Total Numerator Codes for All Clinics	
Oral Health Education Report	192
Periodontal Exam Report	240
Initial Health History Report	130
Total Numerator Codes for Clinic	
Oral Health Education Report	192
Periodontal Exam Report	240
Initial Health History Report	130

Address

Address of Patient on Appointment	
Letter Merge Reports	152
Change of Address	
Coupon Book - Payment Agreements	79
Coupon Book - Future Due Payments	78
Employer Address	
Letter Merge Reports	152
Employers and Employed Patients Report	116
Employer Address (for Guarantor)	
Patient Questionnaire	214
Employer Address (for Patient)	
Patient Questionnaire	214
Guarantor Address	
Family Ledger Report	118
Family Ledger Report (Single Family)	120
Patient Route Slip	216
Truth in Lending Disclosure Statement	320
Walkout - Family Walkout	358
Billing Statement	48
Guarantor City	
Collections Manager List	70
Guarantor State	
Collections Manager List	70
Guarantor Zip Code	
Collections Manager List	70
Insurance Carrier Address	
Insurance Coverage Tables Report	144
Provider IDs List	272
Updated Dental Insurance Payment Table Report	352
Insurance Carrier List	132
Insurance Carrier City and State	
Insurance Eligibility Report	146
Insurance Carrier Street Address	
Insurance Eligibility Report	146
Insurance Plan Name and Address for Primary Insurance	
Patient Questionnaire	214
Insurance Plan Name and Address for Secondary Insurance	
Patient Questionnaire	214
Patient Address	
Birthday List	50
Continuing Care Cards - No Appointment	74
Continuing Care Cards - with Appointment	75
Coupon Book - Future Due Payments	78
Coupon Book - Payment Agreements	79
New Patient List	184
Patient Ledger Report	202
Patient List	204
Patient Questionnaire	214
Patient Route Slip	216
Patient's Ledger Report	220
Prescription Printout	250
Referral Recap Report	284
Referral Slip	286
Walkout - Doctor's Statement	356
Appointment Reminder Cards	18
Patient City	
Patient List (Filtered)	206
Letter Merge Reports	152

Address (continued)

Patient State		Subscriber Address for Secondary Insurance	
Patient List (Filtered)	206	Patient Questionnaire	214
Letter Merge Reports	152	Subscriber's Employer Address for Primary Insurance	
Patient Street Address		Patient Questionnaire	214
Patient List (Filtered)	206	Subscriber's Employer Address for Secondary Insurance	
Letter Merge Reports	152	Patient Questionnaire	214
Practice Address		Adjustment	
Billing Statement	48	Adjustment Date	
Continuing Care Cards - No Appointment	74	Patient's Ledger Report	220
Continuing Care Cards - with Appointment	75	Adjustment Description	
Coupon Book - Future Due Payments	78	Patient's Ledger Report	220
Coupon Book - Payment Agreements	79	Adjustment Type	
Patient Chart and Progress Notes Printout	194	Daily Summary Report	88
Patient Chart Printout	196	Day Sheet (Adjustments) Report	90
Patient Treatment Case Report	218	Adjustment Summary Report	4
Perio - Combined Graphic & Data Chart Report	228	Adjustment Types	
Perio - Exam Comparison Report	232	Custom Practice Information Report	82
Perio - Graphic Chart Report	234	Amount of - Adjustments (Collection)	
Practice Organization List	244	Provider A/R Totals - Daily Report	264
Prescription Printout	250	Amount of - Adjustments (Collection) for Provider	
Provider IDs List	272	Provider A/R Totals - Standard Report	266
Referral Recap Report	284	Provider A/R Totals - Daily Report	264
Referral Slip	286	Amount of - Adjustments (Production)	
Truth in Lending Disclosure Statement	320	Provider A/R Totals - Daily Report	264
Walkout - Family Walkout	358	Amount of - Adjustments (Production) for Provider	
Appointment Reminder Cards	18	Provider A/R Totals - Standard Report	266
Practice City		Provider A/R Totals - Daily Report	264
Registration Information Report	294	Amount of + Adjustments (Collection)	
Practice City State and ZIP Code		Provider A/R Totals - Daily Report	264
Letter Merge Reports	152	Amount of + Adjustments (Collection) for Provider	
Practice Country		Provider A/R Totals - Standard Report	266
Registration Information Report	294	Provider A/R Totals - Daily Report	264
Practice State		Amount of + Adjustments (Production)	
Registration Information Report	294	Provider A/R Totals - Daily Report	264
Practice Street Address		Amount of + Adjustments (Production) for Provider	
Registration Information Report	294	Provider A/R Totals - Standard Report	266
Letter Merge Reports	152	Provider A/R Totals - Daily Report	264
Practice ZIP Code		Amount of Adjustment Type	
Registration Information Report	294	Adjustment Summary Report	4
Provider Address		Amount of Allowances for Patient	
Walkout - Doctor's Statement	356	UDS - Patient Related Revenue Report	336
Referral Address		Amount of Applied Credit Adjustments for Clinic	
Referral Slip	286	Analysis Summary Report - Standard	12
Referral Recap Report	284	Day Sheet Report	100
Referred by Doctor/Other Address		Analysis Summary Report - Daily	8
Referred By Doctor/Other Report	288	Amount of Applied Credit Adjustments for Previous	
Referred by Source Address		Month for Provider	
Letter Merge Reports	152	Day Sheet (Charges and Receipts) Report	94
Referred to Address		Amount of Applied Credit Adjustments for Provider	
Letter Merge Reports	152	Analysis Summary Report - Standard	12
Referred to Doctor Address		Day Sheet Report	100
Referred To Doctor Report	292	Analysis Summary Report - Daily	8
Referring Patient Address		Amount of Bad Debt Write-offs for Patient	
Referred By Patient Report	290	UDS - Patient Related Revenue Report	336
Spouse Address		Amount of Charge Adjustments for Clinic	
Patient Questionnaire	214	Analysis Summary Report - Standard	12
Subscriber Address for Primary Insurance		Day Sheet Report	100
Patient Questionnaire	214	Analysis Summary Report - Daily	8
		Amount of Charge Adjustments for Previous Month for	
		Provider	
		Day Sheet (Charges and Receipts) Report	94
		Day Sheet (Charges and Receipts) Report	94

Adjustment (continued)

Amount of Charge Adjustments for Provider		Amount of Other Applied Credit Adjustments for Provider	
Analysis Summary Report - Standard	12	Analysis Summary Report - Standard	12
Day Sheet Report	100	Day Sheet Report	100
Analysis Summary Report - Daily	8	Analysis Summary Report - Daily	8
Amount of Credit Special Adjustments		Amount of Other Applied Credit Special Adjustments for Clinic	
Provider A/R Totals - Daily Report	264	Day Sheet Report	100
Amount of Credit Special Adjustments for Clinic		Amount of Other Applied Credit Special Adjustments for Provider	
Analysis Summary Report - Standard	12	Day Sheet Report	100
Day Sheet Report	100	Amount of Other Credit Special Adjustments for Clinic	
Analysis Summary Report - Daily	8	Analysis Summary Report - Standard	12
Amount of Credit Special Adjustments for Provider		Analysis Summary Report - Daily	8
Analysis Summary Report - Standard	12	Amount of Other Credit Special Adjustments for Provider	
Day Sheet Report	100	Analysis Summary Report - Standard	12
Provider A/R Totals - Daily Report	264	Analysis Summary Report - Daily	8
Provider A/R Totals - Standard Report	266	Amount of Other Debit Adjustments (Average)	
Analysis Summary Report - Daily	8	Practice Analysis Report	242
Amount of Current Applied Credit Adjustments for Provider		Amount of Other Debit Adjustments (for Date Range)	
Day Sheet (Charges and Receipts) Report	94	Practice Analysis Report	242
Amount of Current Applied Payments for Provider		Amount of Other Debit Adjustments (MTD)	
Day Sheet (Charges and Receipts) Report	94	Practice Analysis Report	242
Amount of Current Charge Adjustments for Provider		Amount of Other Debit Adjustments (YTD)	
Day Sheet (Charges and Receipts) Report	94	Practice Analysis Report	242
Day Sheet (Charges and Receipts) Report	94	Amount of Sliding Discounts for Patient	
Amount of Current Suspended Credit Adjustments for Provider		UDS - Patient Related Revenue Report	336
Day Sheet (Charges and Receipts) Report	94	Amount of Suspended Credit Adjustments for Clinic	
Amount of Debit Adjustments (Average)		Analysis Summary Report - Standard	12
Practice Analysis Report	242	Day Sheet Report	100
Amount of Debit Adjustments (for Date Range)		Analysis Summary Report - Daily	8
Practice Analysis Report	242	Amount of Suspended Credit Adjustments for Previous Month for Provider	
Amount of Debit Adjustments (MTD)		Day Sheet (Charges and Receipts) Report	94
Practice Analysis Report	242	Amount of Suspended Credit Adjustments for Provider	
Amount of Debit Adjustments (YTD)		Analysis Summary Report - Standard	12
Practice Analysis Report	242	Day Sheet Report	100
Amount of Debit Special Adjustments		Analysis Summary Report - Daily	8
Provider A/R Totals - Daily Report	264	Amount of YTD Applied Credit Adjustments for Provider	
Amount of Debit Special Adjustments for Clinic		Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Standard	12	Amount of YTD Charge Adjustments for Provider	
Day Sheet Report	100	Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Daily	8	Day Sheet (Charges and Receipts) Report	94
Amount of Debit Special Adjustments for Provider		Amount of YTD Suspended Credit Adjustments for Provider	
Analysis Summary Report - Standard	12	Day Sheet (Charges and Receipts) Report	94
Day Sheet Report	100	Applied Credit Adjustment Amount	
Provider A/R Totals - Daily Report	264	Analysis Summary Report - Standard	12
Provider A/R Totals - Standard Report	266	Analysis Summary Report - Daily	8
Analysis Summary Report - Daily	8	Average Amount of Adjustment Type	
Amount of MTD Applied Credit Adjustments for Provider		Adjustment Summary Report	4
Day Sheet (Charges and Receipts) Report	94	Average Amount of Adjustments	
Amount of MTD Charge Adjustments for Provider		Day Sheet (Adjustments) Report	90
Day Sheet (Charges and Receipts) Report	94	Average Amount of Adjustments for Clinic	
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Adjustments) Report	90
Amount of MTD Suspended Credit Adjustments for Provider		Average Amount of Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Adjustments) Report	90
Amount of Other Applied Credit Adjustments for Clinic		Average Amount of Credit Adjustments	
Analysis Summary Report - Standard	12	Day Sheet (Adjustments) Report	90
Day Sheet Report	100	Average Amount of Debit Adjustments	
Analysis Summary Report - Daily	8	Day Sheet (Adjustments) Report	90

Adjustment (continued)

Charge Adjustment Amount		Subtotal of Bad Debt Write-offs for Financial Class Type	
Analysis Summary Report - Standard	12	UDS - Patient Related Revenue Report	336
Analysis Summary Report - Daily	8	Subtotal of Bad Debt Write-offs for Payer Category	
Collection Adjustments		UDS - Patient Related Revenue Report	336
Provider A/R Totals - Standard Report	266	Subtotal of Sliding Discounts for Financial Class Type	
Provider A/R Totals - Daily Report	264	UDS - Patient Related Revenue Report	336
Credit Adjustment Amount		Subtotal of Sliding Discounts for Payer Category	
Insurance Carrier Production - Full Report	136	UDS - Patient Related Revenue Report	336
Billing Statement	48	Suspended Credit Adjustment Amount	
Credit Adjustment Amount for Insurance Plan		Analysis Summary Report - Standard	12
Insurance Carrier Production - Summary Report	138	Analysis Summary Report - Daily	8
Insurance Carrier Production - Full Report	136	Total Amount of - Adjustments (Collection)	
Credit Special Adjustment Amount		Provider A/R Totals - Standard Report	266
Analysis Summary Report - Standard	12	Provider A/R Totals - Daily Report	264
Analysis Summary Report - Daily	8	Total Amount of - Adjustments (Production)	
Debit Adjustment Amount		Provider A/R Totals - Standard Report	266
Insurance Carrier Production - Full Report	136	Provider A/R Totals - Daily Report	264
Debit Adjustment Amount for Insurance Plan		Total Amount of + Adjustments (Collection)	
Insurance Carrier Production - Summary Report	138	Provider A/R Totals - Standard Report	266
Insurance Carrier Production - Full Report	136	Provider A/R Totals - Daily Report	264
Debit Special Adjustment Amount		Total Amount of + Adjustments (Production)	
Analysis Summary Report - Standard	12	Provider A/R Totals - Standard Report	266
Analysis Summary Report - Daily	8	Provider A/R Totals - Daily Report	264
Grand Total Amount of Charge Adjustments		Total Amount of Adjustment Type	
Insurance Transaction Analysis Report	148	Daily Summary Report	88
Grand Total Amount of Credit Adjustments		Total Amount of Adjustment Types	
Insurance Transaction Analysis Report	148	Adjustment Summary Report	4
Grand Total Number of Charge Adjustments		Total Amount of Adjustments	
Insurance Transaction Analysis Report	148	Day Sheet (Adjustments) Report	90
Grand Total Number of Credit Adjustments		Daily Summary Report	88
Insurance Transaction Analysis Report	148	Total Amount of Adjustments for Clinic	
Other Applied Credit Adjustment Amount		Day Sheet (Adjustments) Report	90
Analysis Summary Report - Standard	12	Total Amount of Adjustments for Provider	
Analysis Summary Report - Daily	8	Day Sheet (Adjustments) Report	90
Other Credit Special Adjustment Amount		Total Amount of Allowances for Financial Class Type	
Analysis Summary Report - Standard	12	UDS - Patient Related Revenue Report	336
Analysis Summary Report - Daily	8	Total Amount of Allowances for Patient	
Percent of Adjustment Type in Adjustment Type Category		UDS - Patient Related Revenue Report	336
Adjustment Summary Report	4	Total Amount of Allowances for Payer Category	
Production Adjustments		UDS - Patient Related Revenue Report	336
Provider A/R Totals - Standard Report	266	Total Amount of Applied Credit Adjustments	
Provider A/R Totals - Daily Report	264	Analysis Summary Report - Standard	12
Quantity of Adjustment Type		Day Sheet Report	100
Adjustment Summary Report	4	Analysis Summary Report - Daily	8
Quantity of Adjustments for Clinic		Total Amount of Applied Credit Adjustments for Previous Month	
Day Sheet (Adjustments) Report	90	Day Sheet (Charges and Receipts) Report	94
Quantity of Adjustments for Provider		Total Amount of Bad Debt Write-offs for Financial Class Type	
Day Sheet (Adjustments) Report	90	UDS - Patient Related Revenue Report	336
Revenue for Provider from Credit Adjustments		Total Amount of Bad Debt Write-offs for Patient	
Provider Revenue - Charges Report	276	UDS - Patient Related Revenue Report	336
Provider Revenue - Credits Report	278	Total Amount of Bad Debt Write-offs for Payer Category	
Provider Revenue - Summary Report	280	UDS - Patient Related Revenue Report	336
Provider Revenue - Allocations Report	274	Total Amount of Charge Adjustments	
Subtotal of Allowances for Financial Class Type		Analysis Summary Report - Standard	12
UDS - Patient Related Revenue Report	336	Day Sheet Report	100
Subtotal of Allowances for Payer Category		Insurance Transaction Analysis Report	148
UDS - Patient Related Revenue Report	336	Operator Day Sheet Report	188
		Analysis Summary Report - Daily	8

Adjustment (continued)

Total Amount of Charge Adjustments for Previous Month		Total Amount of Sliding Discounts for Payer Category UDS - Patient Related Revenue Report	336
Day Sheet (Charges and Receipts) Report	94	Total Amount of YTD Applied Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Charges and Receipts) Report	94
Total Amount of Credit Adjustments		Total Amount of YTD Charge Adjustments	
Day Sheet (Adjustments) Report	90	Day Sheet (Charges and Receipts) Report	94
Insurance Carrier Production - Full Report	136	Day Sheet (Charges and Receipts) Report	94
Insurance Carrier Production - Summary Report	138	Total Amount of YTD Suspended Credit Adjustments	
Insurance Transaction Analysis Report	148	Day Sheet (Charges and Receipts) Report	94
Operator Day Sheet Report	188	Total Number of Charge Adjustments	
Adjustment Summary Report	4	Insurance Transaction Analysis Report	148
Total Amount of Credit Special Adjustments		Total Number of Credit Adjustments	
Analysis Summary Report - Standard	12	Insurance Transaction Analysis Report	148
Day Sheet Report	100	Total Quantity of Adjustments	
Provider A/R Totals - Daily Report	264	Day Sheet (Adjustments) Report	90
Provider A/R Totals - Standard Report	266	Total Quantity of Credit Adjustments	
Analysis Summary Report - Daily	8	Day Sheet (Adjustments) Report	90
Total Amount of Current Applied Credit Adjustments		Total Quantity of Debit Adjustments	
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Adjustments) Report	90
Total Amount of Current Charge Adjustments		Total Revenue from Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94	Provider Revenue - Charges Report	276
Day Sheet (Charges and Receipts) Report	94	Provider Revenue - Credits Report	278
Total Amount of Current Suspended Credit Adjustments		Provider Revenue - Summary Report	280
Day Sheet (Charges and Receipts) Report	94	Provider Revenue - Allocations Report	274
Total Amount of Debit Adjustments		Adjustment Type	
Day Sheet (Adjustments) Report	90	Adjustment Type	
Insurance Carrier Production - Full Report	136	Daily Summary Report	88
Insurance Carrier Production - Summary Report	138	Day Sheet (Adjustments) Report	90
Adjustment Summary Report	4	Adjustment Summary Report	4
Total Amount of Debit Special Adjustments		Adjustment Types	
Analysis Summary Report - Standard	12	Custom Practice Information Report	82
Day Sheet Report	100	Amount of Adjustment Type	
Provider A/R Totals - Daily Report	264	Adjustment Summary Report	4
Provider A/R Totals - Standard Report	266	Average Amount of Adjustment Type	
Analysis Summary Report - Daily	8	Adjustment Summary Report	4
Total Amount of MTD Applied Credit Adjustments		Quantity of Adjustment Type	
Day Sheet (Charges and Receipts) Report	94	Adjustment Summary Report	4
Total Amount of MTD Charge Adjustments		Total Amount of Adjustment Type	
Day Sheet (Charges and Receipts) Report	94	Daily Summary Report	88
Day Sheet (Charges and Receipts) Report	94	Total Amount of Adjustment Types	
Total Amount of MTD Suspended Credit Adjustments		Adjustment Summary Report	4
Day Sheet (Charges and Receipts) Report	94	Adjustment Type Category	
Total Amount of Other Applied Credit Adjustments		Percent of Adjustment Type in Adjustment Type Category	
Analysis Summary Report - Standard	12	Adjustment Summary Report	4
Day Sheet Report	100	Age	
Analysis Summary Report - Daily	8	20+ Years Old for Financial Class Type	
Total Amount of Other Applied Credit Special Adjustments		UDS - Insurance Financial Class Report	330
Day Sheet Report	100	20+ Years Old for Financial Class Type for Clinic	
Total Amount of Other Credit Special Adjustments		UDS - Insurance Financial Class Report	330
Analysis Summary Report - Standard	12	20+ Years Old for Financial Class Type for Provider	
Analysis Summary Report - Daily	8	UDS - Insurance Financial Class Report	330
Total Amount of Sliding Discounts for Financial Class Type		20+ Years Old for Financial Class Types	
UDS - Patient Related Revenue Report	336	UDS - Insurance Financial Class Report	330
Total Amount of Sliding Discounts for Patient		Age	
UDS - Patient Related Revenue Report	336	UDS - Age/Gender Report	322
		Patient Health Assessment Report	198
		Ages 15 - 19 Years	
		Caries Prevalence and Periodontal Index Report	52

Age (continued)

Ages 2 - 5 Years		Number of Medicaid Patients in First Age Group at Clinic	
Caries Prevalence and Periodontal Index Report		UDS - Medicaid/Medicare Report	334
52		Number of Medicaid Patients in First Age Group for Provider	
Ages 35 - 44 Years		UDS - Medicaid/Medicare Report	334
Caries Prevalence and Periodontal Index Report		Number of Medicaid Patients in First Age Group in ZIP Code	
52		UDS - Medicaid/Medicare Report	334
Ages 55+ Years		Number of Medicaid Patients in First Age Group with Financial Class	
Caries Prevalence and Periodontal Index Report		UDS - Medicaid/Medicare Report	334
52		Number of Medicaid Patients in Second Age Group	
Ages 6 - 14 Years		UDS - Medicaid/Medicare Report	334
Caries Prevalence and Periodontal Index Report		UDS - Medicaid/Medicare Report	334
52		Number of Medicaid Patients in Second Age Group at Clinic	
Guarantor Birth Date & Age		UDS - Medicaid/Medicare Report	334
Collections Manager List	70	Number of Medicaid Patients in Second Age Group for Provider	
Number <19 Years Old for Financial Class Type		UDS - Medicaid/Medicare Report	334
UDS - Insurance Financial Class Report	330	Number of Medicaid Patients in Second Age Group in ZIP Code	
Number <19 Years Old for Financial Class Type for Clinic		UDS - Medicaid/Medicare Report	334
UDS - Insurance Financial Class Report	330	Number of Medicaid Patients in Second Age Group with Financial Class	
Number <19 Years Old for Financial Class Type for Provider		UDS - Medicaid/Medicare Report	334
UDS - Insurance Financial Class Report	330	Number of Medicare Patients in First Age Group	
Number 0 - 17 Years Old for Financial Class Type		UDS - Medicaid/Medicare Report	334
UDS - Insurance Financial Class Report (2013)	332	Number of Medicare Patients in First Age Group at Clinic	
Number 18+ for Financial Class Type		UDS - Medicaid/Medicare Report	334
UDS - Insurance Financial Class Report (2013)	332	Number of Medicare Patients in First Age Group for Provider	
Number of Medicaid and Medicare Patients in First Age Group		UDS - Medicaid/Medicare Report	334
UDS - Medicaid/Medicare Report	334	Number of Medicare Patients in First Age Group in ZIP Code	
Number of Medicaid and Medicare Patients in First Age Group at Clinic		UDS - Medicaid/Medicare Report	334
UDS - Medicaid/Medicare Report	334	Number of Medicare Patients in First Age Group with Financial Class	
Number of Medicaid and Medicare Patients in First Age Group for Provider		UDS - Medicaid/Medicare Report	334
UDS - Medicaid/Medicare Report	334	Number of Medicare Patients in Second Age Group	
Number of Medicaid and Medicare Patients in First Age Group in ZIP Code		UDS - Medicaid/Medicare Report	334
UDS - Medicaid/Medicare Report	334	Number of Medicare Patients in Second Age Group at Clinic	
Number of Medicaid and Medicare Patients in First Age Group with Financial Class		UDS - Medicaid/Medicare Report	334
UDS - Medicaid/Medicare Report	334	Number of Medicare Patients in Second Age Group for Provider	
Number of Medicaid and Medicare Patients in Second Age Group		UDS - Medicaid/Medicare Report	334
UDS - Medicaid/Medicare Report	334	Number of Medicare Patients in Second Age Group in ZIP Code	
Number of Medicaid and Medicare Patients in Second Age Group at Clinic		UDS - Medicaid/Medicare Report	334
UDS - Medicaid/Medicare Report	334	Number of Medicare Patients in Second Age Group with Financial Class	
Number of Medicaid and Medicare Patients in Second Age Group for Provider		UDS - Medicaid/Medicare Report	334
UDS - Medicaid/Medicare Report	334	Number of Patients <6 or 65+ Years	
Number of Medicaid and Medicare Patients in Second Age Group in ZIP Code		Meaningful Use Measure Calculation List	156
UDS - Medicaid/Medicare Report	334	Number of Patients <6 or 65+ Years who Received Appointment Reminders	
Number of Medicaid and Medicare Patients in Second Age Group with Financial Class		Meaningful Use Measure Calculation List	156
UDS - Medicaid/Medicare Report	334	Number of Patients 0 - 19 Years	
Number of Medicaid Patients in First Age Group		Clinical Quality Measures List	66
UDS - Medicaid/Medicare Report	334		

Age (continued)

Number of Patients 0 - 19 Years with Fluoride Varnish Clinical Quality Measures List	66	Number of Patients 2+ Years with Vital Sign Readings Meaningful Use Measure Calculation List	156
Number of Patients 0 - 19 Years with Tooth Decay or Cavities Clinical Quality Measures List	66	Number of Patients 21 - 30 Years Practice Statistics Report	246
Number of Patients 0 - 2 Years Practice Statistics Report	246	Number of Patients 3 - 17 Years Clinical Quality Measures List	66
Number of Patients 0 - 2 Years Seen Meaningful Use Measure Calculation List	156	Number of Patients 3 - 17 Years who Received Nutrition Counseling Clinical Quality Measures List	66
Number of Patients 0 - 2 Years with Vital Sign Readings Meaningful Use Measure Calculation List	156	Number of Patients 3 - 17 Years who Received Physical Activity Counseling Clinical Quality Measures List	66
Number of Patients 11 - 12 Years Practice Statistics Report	246	Number of Patients 3 - 17 Years with BMI Percentile Reading Clinical Quality Measures List	66
Number of Patients 13 - 14 Years Practice Statistics Report	246	Number of Patients 3 - 17 Years with Medical Encounters (with Exclusions) Clinical Quality Measures List	66
Number of Patients 13+ Years Seen Meaningful Use Measure Calculation List	156	Number of Patients 3 - 17 Years with Outpatient Visits (with Exclusions) Clinical Quality Measures List	66
Number of Patients 13+ Years with Smoking Status Meaningful Use Measure Calculation List	156	Number of Patients 3 - 4 Years Practice Statistics Report	246
Number of Patients 13+ Years with Smoking Status Meaningful Use Measure Calculation List	156	Number of Patients 3+ Years with Vital Sign Readings Meaningful Use Measure Calculation List	156
Number of Patients 15 - 16 Years Practice Statistics Report	246	Number of Patients 3+ Years Seen Meaningful Use Measure Calculation List	156
Number of Patients 17 - 20 Years Practice Statistics Report	246	Number of Patients 3+ Years with Vital Sign Readings Meaningful Use Measure Calculation List	156
Number of Patients 18 - 64 Years Clinical Quality Measures List	66	Number of Patients 31 - 40 Years Practice Statistics Report	246
Number of Patients 18 - 64 Years with Abnormal BMI Reading and Follow Up Clinical Quality Measures List	66	Number of Patients 41 - 50 Years Practice Statistics Report	246
Number of Patients 18 - 64 Years with Medical Encounters (with Exclusions) Clinical Quality Measures List	66	Number of Patients 5 - 6 Years Practice Statistics Report	246
Number of Patients 18 - 85 Years Clinical Quality Measures List	66	Number of Patients 51 - 60 Years Practice Statistics Report	246
Number of Patients 18 - 85 Years with Abnormal Blood Pressure Reading Clinical Quality Measures List	66	Number of Patients 6+ Months Clinical Quality Measures List	66
Number of Patients 18 - 85 Years with Hypertension Clinical Quality Measures List	66	Number of Patients 6+ Months who Received Influenza Vaccinations Clinical Quality Measures List	66
Number of Patients 18 - 85 Years with Outpatient Visits (with Exclusions) Clinical Quality Measures List	66	Number of Patients 61 - 70 Years Practice Statistics Report	246
Number of Patients 18+ Years Clinical Quality Measures List	66	Number of Patients 65+ Years Clinical Quality Measures List	66
Number of Patients 18+ Years who Use Tobacco and Received Cessation Counseling Clinical Quality Measures List	66	Number of Patients 65+ Years with Abnormal BMI Reading and Follow Up Clinical Quality Measures List	66
Number of Patients 18+ Years with Current Medications Clinical Quality Measures List	66	Number of Patients 65+ Years with Medical Encounters (with Exclusions) Clinical Quality Measures List	66
Number of Patients 18+ Years with Medical Encounters or Patient Health Assessments Clinical Quality Measures List	66	Number of Patients 66+ Years Clinical Quality Measures List	66
Number of Patients 18+ Years with Visits UDS - Tobacco Use and Intervention Report	342	Number of Patients 66+ Years Seen Clinical Quality Measures List	66
Number of Patients 18+ Years with Medical Encounters or Patient Health Assessments Clinical Quality Measures List	66	Number of Patients 66+ Years with 1+ High-risk Medications Clinical Quality Measures List	66
Number of Patients 2+ Years Seen Meaningful Use Measure Calculation List	156	Number of Patients 66+ Years with 2+ High-risk Medications Clinical Quality Measures List	66

Age (continued)

Number of Patients 7 - 8 Years Practice Statistics Report	246	Account Amount Aged 181+ Pre-Treatment Estimate Aging Report	252
Number of Patients 71 - 80 Years Practice Statistics Report	246	Account Amount Aged 31 - 60 Patient Route Slip	216
Number of Patients 81+ Years Practice Statistics Report	246	Account Amount Aged 61 - 90 Patient Route Slip	216
Number of Patients 9 - 10 Years Practice Statistics Report	246	Account Balance Amount Aged 121 - 150 Pre-Treatment Estimate Aging Report	252
Number of Tobacco Non-users 18+ Years with Tobacco Use Assessment		Account Balance Amount Aged 151 - 180 Pre-Treatment Estimate Aging Report	252
UDS - Tobacco Use and Intervention Report	342	Account Balance Amount Aged 31 - 60 Pre-Treatment Estimate Aging Report	252
Number of Tobacco Users 18+ Years with Tobacco Use Assessment and Tobacco Cessation Counseling or Tobacco Cessation Pharmacotherapy		Account Balance Amount Aged 61 - 90 Pre-Treatment Estimate Aging Report	252
UDS - Tobacco Use and Intervention Report	342	Account Balance Amount Aged 91 - 120 Pre-Treatment Estimate Aging Report	252
Patient Age		Aged Amount 0 - 30 Aging/Credit Balance Report	6
Patient List (Filtered)	206	Aged Amount 0 - 30 for Clinic Aging/Credit Balance Report	6
Patient Route Slip	216	Aged Amount 0 - 30 for Provider Aging/Credit Balance Report	6
Walkout - Doctor's Statement	356	Aged Amount 121 - 150 Aging/Credit Balance Report	6
Continuing Care Display List	76	Aged Amount 121 - 150 for Clinic Aging/Credit Balance Report	6
Percent of Patients 0 - 2 Years Practice Statistics Report	246	Aged Amount 121 - 150 for Provider Aging/Credit Balance Report	6
Percent of Patients 11 - 12 Years Practice Statistics Report	246	Aged Amount 151 - 180 Aging/Credit Balance Report	6
Percent of Patients 13 - 14 Years Practice Statistics Report	246	Aged Amount 151 - 180 for Clinic Aging/Credit Balance Report	6
Percent of Patients 15 - 16 Years Practice Statistics Report	246	Aged Amount 151 - 180 for Provider Aging/Credit Balance Report	6
Percent of Patients 17 - 20 Years Practice Statistics Report	246	Aged Amount 31 - 60 Aging/Credit Balance Report	6
Percent of Patients 21 - 30 Years Practice Statistics Report	246	Aged Amount 31 - 60 for Clinic Aging/Credit Balance Report	6
Percent of Patients 3 - 4 Years Practice Statistics Report	246	Aged Amount 31 - 60 for Provider Aging/Credit Balance Report	6
Percent of Patients 31 - 40 Years Practice Statistics Report	246	Aged Amount 61 - 90 Aging/Credit Balance Report	6
Percent of Patients 41 - 50 Years Practice Statistics Report	246	Aged Amount 61 - 90 for Clinic Aging/Credit Balance Report	6
Percent of Patients 5 - 6 Years Practice Statistics Report	246	Aged Amount 61 - 90 for Provider Aging/Credit Balance Report	6
Percent of Patients 51 - 60 Years Practice Statistics Report	246	Aged Amount 90 - 120 Aging/Credit Balance Report	6
Percent of Patients 61 - 70 Years Practice Statistics Report	246	Aged Amount 90 - 120 for Clinic Aging/Credit Balance Report	6
Percent of Patients 7 - 8 Years Practice Statistics Report	246	Aged Amount 90 - 120 for Provider Aging/Credit Balance Report	6
Percent of Patients 71 - 80 Years Practice Statistics Report	246	Aged Amount Over 180 Aging/Credit Balance Report	6
Percent of Patients 81+ Years Practice Statistics Report	246	Aged Amount Over 180 for Clinic Aging/Credit Balance Report	6
Percent of Patients 9 - 10 Years Practice Statistics Report	246	Aged Amount Over 180 for Provider Aging/Credit Balance Report	6
Total Number <19 Years Old for Financial Class Types UDS - Insurance Financial Class Report	330	Aging 0 - 30 Letter Merge Reports	152
Aging		Aging 31 - 60 Letter Merge Reports	152
Account Amount Aged >90 Patient Route Slip	216		
Account Amount Aged 0 - 30 Patient Route Slip	216		

Aging (continued)

Aging 61 - 90		Total Amount Aged 0 - 30	
Letter Merge Reports	152	Collections Manager List	70
Aging 91+		Aging/Credit Balance Report	6
Letter Merge Reports	152	Total Amount Aged 121 - 150	
Amount Aged >90		Aging/Credit Balance Report	6
Continuing Care Display List	76	Total Amount Aged 151 - 180	
Amount Aged 0 - 30		Aging/Credit Balance Report	6
Continuing Care Display List	76	Total Amount Aged 31 - 60	
Collections Manager List	70	Collections Manager List	70
Amount Aged 31 - 60		Aging/Credit Balance Report	6
Continuing Care Display List	76	Total Amount Aged 61 - 90	
Collections Manager List	70	Collections Manager List	70
Amount Aged 61 - 90		Aging/Credit Balance Report	6
Continuing Care Display List	76	Total Amount Aged 90 - 120	
Collections Manager List	70	Aging/Credit Balance Report	6
Amount Aged 91+		Total Amount Aged 91+	
Collections Manager List	70	Collections Manager List	70
Amount Aged Over 30 Days		Total Amount Aged Over 180	
Billing Statement	48	Aging/Credit Balance Report	6
Amount Aged Over 60 Days		Total Amount of Account Balances Aged 1 - 30 for Pre-treatment Estimates	
Billing Statement	48	Pre-Treatment Estimate Aging Report	252
Amount Aged Over 90 Days		Total Amount of Account Balances Aged 1 - 30 for Primary Pre-treatment Estimates	
Billing Statement	48	Pre-Treatment Estimate Aging Report	252
Amount of Account Balance Aged >90		Total Amount of Account Balances Aged 1 - 30 for Secondary Pre-treatment Estimates	
Insurance Claim Aging Report	140	Pre-Treatment Estimate Aging Report	252
Amount of Account Balance Aged 1 - 30		Total Amount of Account Balances Aged 1 - 30 with Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Amount of Account Balance Aged 31 - 60		Total Amount of Account Balances Aged 1 - 30 with Primary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Amount of Account Balance Aged 61 - 90		Total Amount of Account Balances Aged 1 - 30 with Secondary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Patient Amount Aged >90		Total Amount of Account Balances Aged 121 - 150 for Pre-treatment Estimates	
Patient Route Slip	216	Pre-Treatment Estimate Aging Report	252
Patient Amount Aged 0 - 30		Total Amount of Account Balances Aged 121 - 150 for Primary Pre-treatment Estimates	
Patient Route Slip	216	Pre-Treatment Estimate Aging Report	252
Patient Amount Aged 31 - 60		Total Amount of Account Balances Aged 121 - 150 for Secondary Pre-treatment Estimates	
Patient Route Slip	216	Pre-Treatment Estimate Aging Report	252
Patient Amount Aged 61 - 90		Total Amount of Account Balances Aged 121 - 150 with Claims	
Patient Route Slip	216	Insurance Claim Aging Report	140
Percent of Amount Aged 0 - 30		Total Amount of Account Balances Aged 121 - 150 with Primary Claims	
Aging/Credit Balance Report	6	Insurance Claim Aging Report	140
Percent of Amount Aged 121 - 150		Total Amount of Account Balances Aged 121 - 150 with Secondary Claims	
Aging/Credit Balance Report	6	Insurance Claim Aging Report	140
Percent of Amount Aged 151 - 180		Total Amount of Account Balances Aged 151 - 180 for Pre-treatment Estimates	
Aging/Credit Balance Report	6	Pre-Treatment Estimate Aging Report	252
Percent of Amount Aged 31 - 60		Total Amount of Account Balances Aged 151 - 180 for Primary Pre-treatment Estimates	
Aging/Credit Balance Report	6	Pre-Treatment Estimate Aging Report	252
Percent of Amount Aged 61 - 90		Total Amount of Account Balances Aged 151 - 180 for Secondary Pre-treatment Estimates	
Aging/Credit Balance Report	6	Pre-Treatment Estimate Aging Report	252
Percent of Amount Aged 90 - 120		Total Amount of Account Balances Aged 151 - 180 with Claims	
Aging/Credit Balance Report	6	Insurance Claim Aging Report	140
Percent of Amount Aged Over 180		Total Amount of Account Balances Aged 151 - 180 with Primary Pre-treatment Estimates	
Aging/Credit Balance Report	6	Pre-Treatment Estimate Aging Report	252
Receivables Aged 31 - 60		Total Amount of Account Balances Aged 151 - 180 for Secondary Pre-treatment Estimates	
Practice Analysis Report	242	Pre-Treatment Estimate Aging Report	252
Receivables Aged 61 - 90		Total Amount of Account Balances Aged 151 - 180 with Claims	
Practice Analysis Report	242	Insurance Claim Aging Report	140
Receivables Aged Over 90		Total Amount of Account Balances Aged 151 - 180 with Primary Pre-treatment Estimates	
Practice Analysis Report	242	Pre-Treatment Estimate Aging Report	252

Aging (continued)

Total Amount of Account Balances Aged 151 - 180 for Secondary Pre-treatment Estimates		Total Amount of Account Balances Aged 61 - 90 with Claims	
Pre-Treatment Estimate Aging Report	252	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 151 - 180 with Claims		Total Amount of Account Balances Aged 61 - 90 with Primary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 151 - 180 with Primary Claims		Total Amount of Account Balances Aged 61 - 90 with Secondary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 151 - 180 with Secondary Claims		Total Amount of Account Balances Aged 91 - 120 for Pre-treatment Estimates	
Insurance Claim Aging Report	140	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 181+ for Pre-treatment Estimates		Total Amount of Account Balances Aged 91 - 120 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 181+ for Primary Pre-treatment Estimates		Total Amount of Account Balances Aged 91 - 120 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Pre-Treatment Estimate Aging Report	252	Total Amount of Account Balances Aged 91 - 120 with Claims	
Total Amount of Account Balances Aged 181+ for Secondary Pre-treatment Estimates		Insurance Claim Aging Report	140
Pre-Treatment Estimate Aging Report	252	Total Amount of Account Balances Aged 91 - 120 with Primary Claims	
Total Amount of Account Balances Aged 181+ with Claims		Insurance Claim Aging Report	140
Insurance Claim Aging Report	140	Total Amount of Account Balances Aged 91 - 120 with Secondary Claims	
Total Amount of Account Balances Aged 181+ with Primary Claims		Insurance Claim Aging Report	140
Insurance Claim Aging Report	140		
Total Amount of Account Balances Aged 181+ with Secondary Claims		Alert	
Insurance Claim Aging Report	140	Alerts	
Total Amount of Account Balances Aged 31 - 60 for Pre-treatment Estimates		Appointment Book View Printout	14
Pre-Treatment Estimate Aging Report	252	Family Alert Note	
Total Amount of Account Balances Aged 31 - 60 for Primary Pre-treatment Estimates		Patient Notes Report	208
Pre-Treatment Estimate Aging Report	252	Medical Alert	
Total Amount of Account Balances Aged 31 - 60 for Secondary Pre-treatment Estimates		Patient Route Slip	216
Pre-Treatment Estimate Aging Report	252	Patient Notes Report	208
Total Amount of Account Balances Aged 31 - 60 with Claims		Patient Alert Note	
Insurance Claim Aging Report	140	Patient Notes Report	208
Total Amount of Account Balances Aged 31 - 60 with Primary Claims			
Insurance Claim Aging Report	140	Allergy	
Total Amount of Account Balances Aged 31 - 60 with Secondary Claims		Allergy Description	
Insurance Claim Aging Report	140	Patient List (Filtered)	206
Total Amount of Account Balances Aged 61 - 90 for Pre-treatment Estimates		Allergy Discovery Date	
Pre-Treatment Estimate Aging Report	252	Patient List (Filtered)	206
Total Amount of Account Balances Aged 61 - 90 for Primary Pre-treatment Estimates			
Pre-Treatment Estimate Aging Report	252	Allocate	
Total Amount of Account Balances Aged 61 - 90 for Secondary Pre-treatment Estimates		Allocate Date	
Pre-Treatment Estimate Aging Report	252	Provider Revenue - Charges Report	276
		Provider Revenue - Credits Report	278
		Provider Revenue - Allocations Report	274
		Allocated	
		Allocated Amount	
		Provider Revenue - Credits Report	278
		Provider Revenue - Allocations Report	274
		Allowance	
		Amount of Allowances for Patient	
		UDS - Patient Related Revenue Report	336
		Subtotal of Allowances for Financial Class Type	
		UDS - Patient Related Revenue Report	336
		Subtotal of Allowances for Payer Category	
		UDS - Patient Related Revenue Report	336
		Total Amount of Allowances for Financial Class Type	
		UDS - Patient Related Revenue Report	336
		Total Amount of Allowances for Patient	
		UDS - Patient Related Revenue Report	336

Allowance (continued)

Total Amount of Allowances for Payer Category UDS - Patient Related Revenue Report	336	Aged Amount 121 - 150 for Clinic Aging/Credit Balance Report	6
Alternate ADA Code		Aged Amount 121 - 150 for Provider Aging/Credit Balance Report	6
Alternate ADA Code		Aged Amount 151 - 180 Aging/Credit Balance Report	6
Procedure Code List	256	Aged Amount 151 - 180 for Clinic Aging/Credit Balance Report	6
Insurance Carrier List	132	Aged Amount 151 - 180 for Provider Aging/Credit Balance Report	6
Alternate Case		Aged Amount 31 - 60 Aging/Credit Balance Report	6
Alternate Case Name		Aged Amount 31 - 60 for Clinic Aging/Credit Balance Report	6
Practice Treatment Case Report	248	Aged Amount 31 - 60 for Provider Aging/Credit Balance Report	6
Treatment Case Report	314	Aged Amount 61 - 90 Aging/Credit Balance Report	6
Patient Treatment Case Report	218	Aged Amount 61 - 90 for Clinic Aging/Credit Balance Report	6
Alternate Fee Schedule		Aged Amount 61 - 90 for Provider Aging/Credit Balance Report	6
Fee from Alternate Fee Schedule Treatment Case Report	314	Aged Amount Over 180 Aging/Credit Balance Report	6
Fee from Alternate Fee Schedule for Visit Treatment Case Report	314	Aged Amount Over 180 for Clinic Aging/Credit Balance Report	6
Total Fee from Alternate Fee Schedule for Case Treatment Case Report	314	Aged Amount Over 180 for Provider Aging/Credit Balance Report	6
AMA Code		Allocated Amount Provider Revenue - Credits Report	278
Medical Code		Provider Revenue - Allocations Report	274
Procedure Code List	256	Amount	
AMA CPT		Patient Chart and Progress Notes Printout	194
AMA CPT Code		Day Sheet (Adjustments) Report	90
Procedure Code List	256	Amount Aged >90 Continuing Care Display List	76
Medical Code List	180	Amount Aged 0 - 30 Continuing Care Display List	76
AMA CPT Code Description		Collections Manager List	70
Medical Code List	180	Amount Aged 31 - 60 Continuing Care Display List	76
Amount		Collections Manager List	70
Account Amount Aged >90 Patient Route Slip	216	Amount Aged 61 - 90 Continuing Care Display List	76
Account Amount Aged 0 - 30 Patient Route Slip	216	Collections Manager List	70
Account Amount Aged 181+ Pre-Treatment Estimate Aging Report	252	Amount Aged 91+ Collections Manager List	70
Account Amount Aged 31 - 60 Patient Route Slip	216	Amount Aged Over 30 Days Billing Statement	48
Account Amount Aged 61 - 90 Patient Route Slip	216	Amount Aged Over 60 Days Billing Statement	48
Account Balance Amount Aged 121 - 150 Pre-Treatment Estimate Aging Report	252	Amount Aged Over 90 Days Billing Statement	48
Account Balance Amount Aged 151 - 180 Pre-Treatment Estimate Aging Report	252	Amount Billed to Insurance Analysis Summary Report - Standard	12
Account Balance Amount Aged 31 - 60 Pre-Treatment Estimate Aging Report	252	Collections Manager List	70
Account Balance Amount Aged 61 - 90 Pre-Treatment Estimate Aging Report	252		
Account Balance Amount Aged 91 - 120 Pre-Treatment Estimate Aging Report	252		
Account Estimated Insurance Portion Patient Route Slip	216		
Account Suspended Credit Amount Patient Route Slip	216		
Aged Amount 0 - 30 Aging/Credit Balance Report	6		
Aged Amount 0 - 30 for Clinic Aging/Credit Balance Report	6		
Aged Amount 0 - 30 for Provider Aging/Credit Balance Report	6		
Aged Amount 121 - 150 Aging/Credit Balance Report	6		

Amount (continued)

Analysis Summary Report - Daily	8	Amount of Annual Secondary Insurance Plan Benefits for Family	
Amount Billed to Insurance for Clinic		Treatment Case Report	314
Analysis Summary Report - Standard	12	Amount of Annual Secondary Insurance Plan Benefits for Patient	
Day Sheet Report	100	Treatment Case Report	314
Analysis Summary Report - Daily	8	Patient Treatment Case Report	218
Amount Billed to Insurance for Provider		Amount of Applied Credit Adjustments for Clinic	
Analysis Summary Report - Standard	12	Analysis Summary Report - Standard	12
Day Sheet Report	100	Day Sheet Report	100
Analysis Summary Report - Daily	8	Analysis Summary Report - Daily	8
Amount Collected for Patient		Amount of Applied Credit Adjustments for Previous Month for Provider	
UDS - Patient Related Revenue Report	336	Day Sheet (Charges and Receipts) Report	94
Amount Due for Payment Agreement		Amount of Applied Credit Adjustments for Provider	
Collections Manager List	70	Analysis Summary Report - Standard	12
Amount Enclosed		Day Sheet Report	100
Coupon Book - Future Due Payments	78	Analysis Summary Report - Daily	8
Coupon Book - Payment Agreements	79	Amount of Applied Insurance Payments for Clinic	
Billing Statement	48	Analysis Summary Report - Standard	12
Amount Financed		Day Sheet Report	100
Truth in Lending Disclosure Statement	320	Analysis Summary Report - Daily	8
Amount for Today's Completed Work		Amount of Applied Insurance Payments for Provider	
Patient Chart Printout	196	Analysis Summary Report - Standard	12
Amount of - Adjustments (Collection)		Day Sheet Report	100
Provider A/R Totals - Daily Report	264	Analysis Summary Report - Daily	8
Amount of - Adjustments (Collection) for Provider		Amount of Applied Payments for Clinic	
Provider A/R Totals - Standard Report	266	Analysis Summary Report - Standard	12
Provider A/R Totals - Daily Report	264	Day Sheet Report	100
Amount of - Adjustments (Production)		Analysis Summary Report - Daily	8
Provider A/R Totals - Daily Report	264	Amount of Applied Payments for Previous Month for Provider	
Amount of - Adjustments (Production) for Provider		Day Sheet (Charges and Receipts) Report	94
Provider A/R Totals - Standard Report	266	Amount of Applied Payments for Provider	
Provider A/R Totals - Daily Report	264	Analysis Summary Report - Standard	12
Amount of + Adjustments (Collection)		Day Sheet Report	100
Provider A/R Totals - Daily Report	264	Analysis Summary Report - Daily	8
Amount of + Adjustments (Collection) for Provider		Amount of Bad Debt Write-offs for Patient	
Provider A/R Totals - Standard Report	266	UDS - Patient Related Revenue Report	336
Provider A/R Totals - Daily Report	264	Amount of Beginning Balances for Clinic	
Amount of + Adjustments (Production)		Analysis Summary Report - Standard	12
Provider A/R Totals - Daily Report	264	Analysis Summary Report - Daily	8
Amount of + Adjustments (Production) for Provider		Amount of Beginning Balances for Provider	
Provider A/R Totals - Standard Report	266	Analysis Summary Report - Standard	12
Provider A/R Totals - Daily Report	264	Analysis Summary Report - Daily	8
Amount of Account Balance Aged >90		Amount of Charge Adjustments for Clinic	
Insurance Claim Aging Report	140	Analysis Summary Report - Standard	12
Amount of Account Balance Aged 1 - 30		Day Sheet Report	100
Insurance Claim Aging Report	140	Analysis Summary Report - Daily	8
Amount of Account Balance Aged 31 - 60		Amount of Charge Adjustments for Previous Month for Provider	
Insurance Claim Aging Report	140	Day Sheet (Charges and Receipts) Report	94
Amount of Account Balance Aged 61 - 90		Day Sheet (Charges and Receipts) Report	94
Insurance Claim Aging Report	140	Amount of Charge Adjustments for Provider	
Amount of Adjustment Type		Analysis Summary Report - Standard	12
Adjustment Summary Report	4	Day Sheet Report	100
Amount of Allowances for Patient		Analysis Summary Report - Daily	8
UDS - Patient Related Revenue Report	336	Amount of Charges	
Amount of Annual Primary Insurance Plan Benefits for Family		Future Due Payment Plan Report - Monthly Totals	126
Treatment Case Report	314	Provider A/R Totals - Daily Report	264
Amount of Annual Primary Insurance Plan Benefits for Patient		Daily Summary Report	88
Treatment Case Report	314		
Patient Treatment Case Report	218		

Amount (continued)

Amount of Charges Billed to Insurance for Previous Month for Provider		Amount of Current Finance Charges for Provider Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Amount of Current Late Charges for Provider Day Sheet (Charges and Receipts) Report	94
Amount of Charges for Clinic Day Sheet Report	100	Amount of Current Suspended Credit Adjustments for Provider Day Sheet (Charges and Receipts) Report	94
Amount of Charges for Patient UDS - Patient Related Revenue Report	336	Amount of Current Suspended Payments for Provider Day Sheet (Charges and Receipts) Report	94
Amount of Charges for Previous Month for Provider Day Sheet (Charges and Receipts) Report	94	Amount of Debit Adjustments (Average) Practice Analysis Report	242
Amount of Charges for Provider Provider A/R Totals - Daily Report	264	Amount of Debit Adjustments (for Date Range) Practice Analysis Report	242
Provider A/R Totals - Standard Report	266	Amount of Debit Adjustments (MTD) Practice Analysis Report	242
Day Sheet Report	100	Amount of Debit Adjustments (YTD) Practice Analysis Report	242
Amount of Claim Insurance Claims Not Sent Report	142	Amount of Debit Initial Balances (Production) Provider A/R Totals - Daily Report	264
Amount of Completed Procedures for Patient Procedures Not Attached to Insurance Report	258	Amount of Debit Initial Balances (Production) for Provider A/R Totals - Standard Report	266
Amount of Co-pays for Insurance Carrier Utilization Report	354	Provider A/R Totals - Daily Report	264
Amount of Credit Initial Balances Provider A/R Totals - Daily Report	264	Amount of Debit Initial Balances for Clinic Analysis Summary Report - Standard	12
Amount of Credit Initial Balances for Clinic Analysis Summary Report - Standard	12	Day Sheet Report	100
Day Sheet Report	100	Analysis Summary Report - Daily	8
Analysis Summary Report - Daily	8	Amount of Debit Initial Balances for Provider Analysis Summary Report - Standard	12
Amount of Credit Initial Balances for Provider Analysis Summary Report - Standard	12	Day Sheet Report	100
Day Sheet Report	100	Analysis Summary Report - Daily	8
Provider A/R Totals - Daily Report	264	Amount of Debit Special Adjustments Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266	Amount of Debit Special Adjustments for Clinic Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8	Day Sheet Report	100
Amount of Credit Special Adjustments Provider A/R Totals - Daily Report	264	Analysis Summary Report - Daily	8
Amount of Credit Special Adjustments for Clinic Analysis Summary Report - Standard	12	Amount of Debit Special Adjustments for Provider Analysis Summary Report - Standard	12
Day Sheet Report	100	Day Sheet Report	100
Analysis Summary Report - Daily	8	Analysis Summary Report - Daily	8
Amount of Credit Special Adjustments for Provider Analysis Summary Report - Standard	12	Provider A/R Totals - Daily Report	264
Day Sheet Report	100	Provider A/R Totals - Standard Report	266
Provider A/R Totals - Daily Report	264	Analysis Summary Report - Daily	8
Provider A/R Totals - Standard Report	266	Amount of Dental Insurance Portion Patient Chart Printout	196
Analysis Summary Report - Daily	8	Amount of Ending Balances for Clinic Analysis Summary Report - Standard	12
Amount of Current Applied Credit Adjustments for Provider Day Sheet (Charges and Receipts) Report	94	Analysis Summary Report - Daily	8
Amount of Current Applied Payments for Provider Day Sheet (Charges and Receipts) Report	94	Amount of Ending Balances for Provider Analysis Summary Report - Standard	12
Amount of Current Charge Adjustments for Provider Day Sheet (Charges and Receipts) Report	94	Analysis Summary Report - Daily	8
Day Sheet (Charges and Receipts) Report	94	Amount of Estimated Insurance Portion Insurance Claim Aging Report	140
Day Sheet (Charges and Receipts) Report	94	Amount of Estimated Primary Insurance Benefits Remaining YTD for Family Treatment Case Report	314
Amount of Current Charges Walkout - Family Walkout	358	Amount of Estimated Primary Insurance Benefits Remaining YTD for Patient Treatment Case Report	314
Amount of Current Charges Billed to Insurance for Provider Day Sheet (Charges and Receipts) Report	94	Patient Treatment Case Report	218
Amount of Current Charges Compared to Fee Schedule for Provider Day Sheet (Charges and Receipts) Report	94	Amount of Estimated Secondary Insurance Benefits Remaining YTD for Family Treatment Case Report	314
Amount of Current Credits Walkout - Family Walkout	358		

Amount (continued)

Amount of Estimated Secondary Insurance Benefits Remaining YTD for Patient		Amount of Insured Charges (YTD)	
Treatment Case Report	314	Practice Analysis Report	242
Patient Treatment Case Report	218	Amount of Lab Expenses for Clinic	
Amount of Fees - Co-pays for Insurance Carrier		RVU Day Sheet Report	296
Utilization Report	354	Amount of Lab Expenses for Medicaid Procedures for Clinic	
Amount of Fees - RVU for Insurance Carrier		RVU Production Summary Report	298
RVU Utilization Report	304	Amount of Lab Expenses for Medicaid Procedures for Provider	
Amount of Fees for Insurance Carrier		RVU Production Summary Report	298
Utilization Report	354	Amount of Lab Expenses for Provider	
RVU Utilization Report	304	RVU Day Sheet Report	296
Amount of Finance Charges		Amount of Lab Expenses of Non-Medicaid Procedures for Clinic	
Provider A/R Totals - Daily Report	264	RVU Production Summary Report	298
Amount of Finance Charges (Average)		Amount of Lab Expenses of Non-Medicaid Procedures for Provider	
Practice Analysis Report	242	RVU Production Summary Report	298
Amount of Finance Charges (for Date Range)		Amount of Lab Expenses of Procedures for Clinic	
Practice Analysis Report	242	RVU Production Summary Report	298
Amount of Finance Charges (MTD)		Amount of Lab Expenses of Procedures for Provider	
Practice Analysis Report	242	RVU Production Summary Report	298
Amount of Finance Charges (YTD)		Amount of Last Payment Amount	
Practice Analysis Report	242	Letter Merge Reports	152
Amount of Finance Charges for Clinic		Amount of Late Charges	
Analysis Summary Report - Standard	12	Provider A/R Totals - Daily Report	264
Day Sheet Report	100	Amount of Late Charges (Average)	
Finance Charge Report	124	Practice Analysis Report	242
Analysis Summary Report - Daily	8	Amount of Late Charges (for Date Range)	
Amount of Finance Charges for Previous Month for Provider		Practice Analysis Report	242
Day Sheet (Charges and Receipts) Report	94	Amount of Late Charges (MTD)	
Amount of Finance Charges for Provider		Practice Analysis Report	242
Analysis Summary Report - Standard	12	Amount of Late Charges (YTD)	
Day Sheet Report	100	Practice Analysis Report	242
Finance Charge Report	124	Amount of Late Charges for Clinic	
Provider A/R Totals - Daily Report	264	Analysis Summary Report - Standard	12
Provider A/R Totals - Standard Report	266	Day Sheet Report	100
Analysis Summary Report - Daily	8	Late Charge Report	150
Amount of Finance Charges YTD		Analysis Summary Report - Daily	8
Walkout - Family Walkout	358	Amount of Late Charges for Previous Month for Provider	
Amount of Future Due Payment Agreements		Day Sheet (Charges and Receipts) Report	94
Practice Analysis Report	242	Amount of Late Charges for Provider	
Amount of Guarantor Payments YTD		Analysis Summary Report - Standard	12
Walkout - Family Walkout	358	Day Sheet Report	100
Amount of Insurance Estimate		Late Charge Report	150
Billing Statement	48	Provider A/R Totals - Daily Report	264
Amount of Insurance Estimates		Provider A/R Totals - Standard Report	266
Aging/Credit Balance Report	6	Analysis Summary Report - Daily	8
Amount of Insurance Payments		Amount of Late Charges YTD	
Provider A/R Totals - Daily Report	264	Walkout - Family Walkout	358
Amount of Insurance Payments for Provider		Amount of Medicaid Procedures for Clinic	
Provider A/R Totals - Standard Report	266	RVU Production Summary Report	298
Provider A/R Totals - Daily Report	264	Production Summary Report	260
Amount of Insurance Payments YTD		Amount of Medicaid Procedures for Provider	
Walkout - Family Walkout	358	RVU Production Summary Report	298
Amount of Insured Charges (Average)		Production Summary Report	260
Practice Analysis Report	242	Amount of MTD Applied Credit Adjustments for Provider	
Amount of Insured Charges (for Date Range)		Day Sheet (Charges and Receipts) Report	94
Practice Analysis Report	242	Amount of MTD Applied Payments for Provider	
Amount of Insured Charges (MTD)		Day Sheet (Charges and Receipts) Report	94
Practice Analysis Report	242		

Amount (continued)

Amount of MTD Charge Adjustments for Provider		Amount of Other Applied Credit Initial Balances for Provider	
Day Sheet (Charges and Receipts) Report	94	Day Sheet Report	100
Day Sheet (Charges and Receipts) Report	94	Amount of Other Applied Credit Special Adjustments for Clinic	
Amount of MTD Charges Billed to Insurance for Provider		Day Sheet Report	100
Day Sheet (Charges and Receipts) Report	94	Amount of Other Applied Credit Special Adjustments for Provider	
Amount of MTD Charges for Provider		Day Sheet Report	100
Day Sheet (Charges and Receipts) Report	94	Amount of Other Applied Insurance Payments for Clinic	
Amount of MTD Finance Charges for Provider		Analysis Summary Report - Standard	12
Day Sheet (Charges and Receipts) Report	94	Day Sheet Report	100
Amount of MTD Late Charges for Provider		Analysis Summary Report - Daily	8
Day Sheet (Charges and Receipts) Report	94	Amount of Other Applied Insurance Payments for Provider	
Amount of MTD Suspended Credit Adjustments for Provider		Analysis Summary Report - Standard	12
Day Sheet (Charges and Receipts) Report	94	Day Sheet Report	100
Amount of MTD Suspended Payments for Provider		Analysis Summary Report - Daily	8
Day Sheet (Charges and Receipts) Report	94	Amount of Other Applied Payments for Clinic	
Amount of Net Change		Analysis Summary Report - Standard	12
Provider A/R Totals - Daily Report	264	Day Sheet Report	100
Amount of Net Change for Clinic		Analysis Summary Report - Daily	8
Analysis Summary Report - Standard	12	Amount of Other Applied Payments for Provider	
Analysis Summary Report - Daily	8	Analysis Summary Report - Standard	12
Amount of Net Change for Provider		Day Sheet Report	100
Analysis Summary Report - Standard	12	Analysis Summary Report - Daily	8
Provider A/R Totals - Daily Report	264	Amount of Other Credit Initial Balances for Clinic	
Provider A/R Totals - Standard Report	266	Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8	Analysis Summary Report - Daily	8
Amount of Non-insured Charges (Average)		Amount of Other Credit Initial Balances for Provider	
Practice Analysis Report	242	Analysis Summary Report - Standard	12
Amount of Non-insured Charges (for Date Range)		Analysis Summary Report - Daily	8
Practice Analysis Report	242	Amount of Other Credit Special Adjustments for Clinic	
Amount of Non-insured Charges (MTD)		Analysis Summary Report - Standard	12
Practice Analysis Report	242	Analysis Summary Report - Daily	8
Amount of Non-insured Charges (YTD)		Amount of Other Credit Special Adjustments for Provider	
Practice Analysis Report	242	Analysis Summary Report - Standard	12
Amount of Non-Medicaid Procedures for Clinic		Analysis Summary Report - Daily	8
RVU Production Summary Report	298	Amount of Other Debit Adjustments (Average)	
Production Summary Report	260	Practice Analysis Report	242
Amount of Non-Medicaid Procedures for Provider		Amount of Other Debit Adjustments (for Date Range)	
RVU Production Summary Report	298	Practice Analysis Report	242
Production Summary Report	260	Amount of Other Debit Adjustments (MTD)	
Amount of Office Portion		Practice Analysis Report	242
Patient Treatment Case Report	218	Amount of Other Debit Adjustments (YTD)	
Amount of Office Portion for Case		Practice Analysis Report	242
Patient Treatment Case Report	218	Amount of Other Deductible Owed by Family to Primary Insurance	
Amount of Office Portion for Visit		Patient Route Slip	216
Patient Treatment Case Report	218	Amount of Other Deductible Owed by Family to Secondary Insurance	
Amount of Other Applied Credit Adjustments for Clinic		Patient Route Slip	216
Analysis Summary Report - Standard	12	Amount of Other Deductible Owed to Primary Insurance	
Day Sheet Report	100	Patient Route Slip	216
Analysis Summary Report - Daily	8	Amount of Other Deductible Owed to Secondary Insurance	
Amount of Other Applied Credit Adjustments for Provider		Patient Route Slip	216
Analysis Summary Report - Standard	12	Amount of Patient Portion	
Day Sheet Report	100	Patient Treatment Case Report	218
Analysis Summary Report - Daily	8	Practice Treatment Case Report	248
Amount of Other Applied Credit Initial Balances for Clinic			
Day Sheet Report	100		

Amount (continued)

Treatment Case Report	314	Patient Treatment Case Report	218
Patient Chart Printout	196	Amount of Primary Insurance Portion for Case	
Amount of Patient Portion for Case		Practice Treatment Case Report	248
Practice Treatment Case Report	248	Patient Treatment Case Report	218
Patient Treatment Case Report	218	Amount of Primary Insurance Portion for Visit	
Amount of Patient Portion for Visit		Practice Treatment Case Report	248
Practice Treatment Case Report	248	Treatment Case Report	314
Treatment Case Report	314	Patient Treatment Case Report	218
Patient Treatment Case Report	218	Amount of Procedure	
Amount of Payment Agreements		Treatment Plan Approval Status Report	318
Practice Analysis Report	242	Treatment Plan Approval Report	316
Amount of Payment Type		Amount of Procedures for Clinic	
Payment Summary Report	226	RVU Production Summary Report	298
Amount of Payments		Production Summary Report	260
Provider A/R Totals - Daily Report	264	Amount of Procedures for Provider	
Amount of Payments for Provider		RVU Production Summary Report	298
Provider A/R Totals - Standard Report	266	Production Summary Report	260
Provider A/R Totals - Daily Report	264	Amount of Remaining Benefits for Primary Insurance	
Amount of Pending Estimated Primary Insurance Portions YTD for Family		Treatment Plan Approval Status Report	318
Treatment Case Report	314	Treatment Plan Approval Report	316
Amount of Pending Estimated Primary Insurance Portions YTD for Patient		Amount of Remaining Benefits for Secondary Insurance	
Treatment Case Report	314	Treatment Plan Approval Status Report	318
Patient Treatment Case Report	218	Treatment Plan Approval Report	316
Amount of Pending Estimated Secondary Insurance Portions YTD for Family		Amount of RVUs for Insurance Carrier	
Treatment Case Report	314	RVU Utilization Report	304
Amount of Pending Estimated Secondary Insurance Portions YTD for Patient		Amount of Secondary Insurance Benefits Remaining	
Treatment Case Report	314	Unscheduled Treatment Plans (Detailed) Report	350
Patient Treatment Case Report	218	Patient Route Slip	216
Amount of Preventative Deductible Owed by Family to Primary Insurance		Amount of Secondary Insurance Benefits Used	
Patient Route Slip	216	Patient Route Slip	216
Amount of Preventative Deductible Owed by Family to Secondary Insurance		Amount of Secondary Insurance Portion	
Patient Route Slip	216	Practice Treatment Case Report	248
Amount of Preventative Deductible Owed to Primary Insurance		Treatment Case Report	314
Patient Route Slip	216	Patient Treatment Case Report	218
Amount of Preventative Deductible Owed to Secondary Insurance		Amount of Secondary Insurance Portion for Case	
Patient Route Slip	216	Practice Treatment Case Report	248
Amount of Primary Insurance Benefits Remaining		Patient Treatment Case Report	218
Unscheduled Treatment Plans (Detailed) Report	350	Amount of Secondary Insurance Portion for Visit	
Patient Route Slip	216	Practice Treatment Case Report	248
Amount of Primary Insurance Benefits Used		Treatment Case Report	314
Patient Route Slip	216	Patient Treatment Case Report	218
Amount of Primary Insurance Paid Benefits YTD for Family		Amount of Secondary Paid Benefits for Family	
Treatment Case Report	314	Treatment Case Report	314
Amount of Primary Insurance Paid Benefits YTD for Patient		Amount of Secondary Paid Benefits for Patient	
Treatment Case Report	314	Treatment Case Report	314
Patient Treatment Case Report	218	Patient Treatment Case Report	218
Amount of Primary Insurance Portion		Amount of Sliding Discounts for Patient	
Practice Treatment Case Report	248	UDS - Patient Related Revenue Report	336
Treatment Case Report	314	Amount of Standard Deductible Owed by Family to Primary Insurance	
Amount of Primary Insurance Portion		Patient Route Slip	216
Practice Treatment Case Report	248	Amount of Standard Deductible Owed by Family to Secondary Insurance	
Treatment Case Report	314	Patient Route Slip	216
Amount of Primary Insurance Portion		Amount of Standard Deductible Owed to Primary Insurance	
Practice Treatment Case Report	248	Patient Route Slip	216
Treatment Case Report	314	Amount of Standard Deductible Owed to Secondary Insurance	
		Patient Route Slip	216

Amount (continued)

Amount of Suspended Credit Adjustments for Clinic		Amount Paid by Insurance	
Analysis Summary Report - Standard	12	Dental Encounters Report	106
Day Sheet Report	100	Amount to Pay	
Analysis Summary Report - Daily	8	Billing Statement	48
Amount of Suspended Credit Adjustments for Previous Month for Provider		Applied Credit Adjustment Amount	
Day Sheet (Charges and Receipts) Report	94	Analysis Summary Report - Standard	12
Amount of Suspended Credit Adjustments for Provider		Analysis Summary Report - Daily	8
Analysis Summary Report - Standard	12	Applied Insurance Payment Amount	
Day Sheet Report	100	Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8	Analysis Summary Report - Daily	8
Amount of Suspended Credits		Applied Payment Amount	
Aging/Credit Balance Report	6	Analysis Summary Report - Standard	12
Amount of Suspended Credits for Guarantor		Analysis Summary Report - Daily	8
Suspended Credits Report	312	Appointment Amount	
Amount of Suspended Insurance Payments for Clinic		Audit Report - Appointments	26
Analysis Summary Report - Standard	12	Appointment Amount Change	
Day Sheet Report	100	Audit Report - Appointments	26
Analysis Summary Report - Daily	8	Appointment Production Amount	
Amount of Suspended Insurance Payments for Provider		Appointment Book View Printout	14
Analysis Summary Report - Standard	12	Average Amount of Adjustment Type	
Day Sheet Report	100	Adjustment Summary Report	4
Analysis Summary Report - Daily	8	Average Amount of Adjustments	
Amount of Suspended Payments for Clinic		Day Sheet (Adjustments) Report	90
Analysis Summary Report - Standard	12	Average Amount of Adjustments for Clinic	
Day Sheet Report	100	Day Sheet (Adjustments) Report	90
Analysis Summary Report - Daily	8	Average Amount of Adjustments for Provider	
Amount of Suspended Payments for Previous Month for Provider		Day Sheet (Adjustments) Report	90
Day Sheet (Charges and Receipts) Report	94	Average Amount of Credit Adjustments	
Amount of Suspended Payments for Provider		Day Sheet (Adjustments) Report	90
Analysis Summary Report - Standard	12	Average Amount of Debit Adjustments	
Day Sheet Report	100	Day Sheet (Adjustments) Report	90
Analysis Summary Report - Daily	8	Average Amount of Finance Charges	
Amount of Treatment-planned Procedure		Day Sheet (Adjustments) Report	90
Patient Chart Printout	196	Average Amount of Late Charges	
Amount of YTD Applied Credit Adjustments for Provider		Day Sheet (Adjustments) Report	90
Day Sheet (Charges and Receipts) Report	94	Average Amount of Medicaid Procedures	
Amount of YTD Applied Payments for Provider		RVU Production Summary Report	298
Day Sheet (Charges and Receipts) Report	94	Production Summary Report	260
Amount of YTD Charge Adjustments for Provider		Average Amount of Medicaid Procedures for Clinic	
Day Sheet (Charges and Receipts) Report	94	RVU Production Summary Report	298
Day Sheet (Charges and Receipts) Report	94	Production Summary Report	260
Amount of YTD Charges Billed to Insurance for Provider		Average Amount of Medicaid Procedures for Provider	
Day Sheet (Charges and Receipts) Report	94	RVU Production Summary Report	298
Amount of YTD Charges for Provider		Production Summary Report	260
Day Sheet (Charges and Receipts) Report	94	Average Amount of Non-Medicaid Procedures	
Amount of YTD Finance Charges for Provider		RVU Production Summary Report	298
Day Sheet (Charges and Receipts) Report	94	Production Summary Report	260
Amount of YTD Late Charges for Provider		Average Amount of Non-Medicaid Procedures for Clinic	
Day Sheet (Charges and Receipts) Report	94	RVU Production Summary Report	298
Amount of YTD Suspended Credit Adjustments for Provider		Production Summary Report	260
Day Sheet (Charges and Receipts) Report	94	Average Amount of Non-Medicaid Procedures for Provider	
Amount of YTD Suspended Payments for Provider		RVU Production Summary Report	298
Day Sheet (Charges and Receipts) Report	94	Production Summary Report	260
Amount Paid		Average Amount of Payment Type	
Coupon Book - Payment Agreements	79	Payment Summary Report	226
Coupon Book - Future Due Payments	78	Average Amount of Payments	
		Payment Summary Report	226
		Average Amount of Procedures	
		RVU Production Summary Report	298
		Production Summary Report	260

Amount (continued)

Average Amount of Procedures for Clinic		Credit Special Adjustment Amount	
RVU Production Summary Report	298	Analysis Summary Report - Standard	12
Production Summary Report	260	Analysis Summary Report - Daily	8
Average Amount of Procedures for Provider		Debit Adjustment Amount	
RVU Production Summary Report	298	Insurance Carrier Production - Full Report	136
Production Summary Report	260	Debit Adjustment Amount for Insurance Plan	
Average Monthly Charge Amount		Insurance Carrier Production - Summary Report	138
Future Due Payment Plan Report - Monthly Totals	126	Insurance Carrier Production - Full Report	136
Average Payment Amount		Debit Special Adjustment Amount	
Day Sheet (Receipts) Report	98	Analysis Summary Report - Standard	12
Average Payment Amount for Clinic		Analysis Summary Report - Daily	8
Day Sheet (Receipts) Report	98	Estimated Amount of Deductibles to Be Applied	
Average Payment Amount for Initial Provider		Treatment Case Report	314
Day Sheet (Receipts) Report	98	Patient Treatment Case Report	218
Average Payment Amount for Payment Type		Estimated Amount of Insurance Payments	
Day Sheet (Receipts) Report	98	Treatment Case Report	314
Average Payment Amount for Provider		Patient Treatment Case Report	218
Day Sheet (Receipts) Report	98	Treatment Case Report	314
Case Amount		Patient Proposed Treatment Case Report (Your	
Patient Proposed Treatment Case Report (Your	212	Care Plan)	212
Charge Adjustment Amount		Estimated Guarantor Portion	
Analysis Summary Report - Standard	12	Patient Route Slip	216
Analysis Summary Report - Daily	8	Estimated Insurance Portion	
Charge Amount		Patient Proposed Treatment Case Report (Your	
Analysis Summary Report - Standard	12	Care Plan)	212
Day Sheet (Charges and Receipts) Report	94	Dental Encounters Report	106
Day Sheet Report	100	Estimated Patient Portion	
Family Ledger Report	118	Patient Route Slip	216
Family Ledger Report (Single Family)	120	Finance Charge Amount	
Insurance Transaction Analysis Report	148	Analysis Summary Report - Daily	8
Operator Day Sheet Report	188	Analysis Summary Report - Standard	12
Patient Ledger Report	202	Finance Charge Report	124
Patient's Ledger Report	220	Adjustment Summary Report	4
Walkout - Doctor's Statement	356	First Payment Amount	
Walkout - Family Walkout	358	Truth in Lending Disclosure Statement	320
Analysis Summary Report - Daily	8	Future Due Payment Plan Total	
Claim Amount		Future Due Payment Plan Report - Standard	128
Secondary Insurance Claims Not Created Report	306	Grand Total Amount of Charge Adjustments	
Insurance Transaction Analysis Report	148	Insurance Transaction Analysis Report	148
Collection Amount		Grand Total Amount of Credit Adjustments	
Provider A/R Totals - Daily Report	264	Insurance Transaction Analysis Report	148
Collection Amount for Provider		Grand Total Amount of Insurance Payments Received	
Provider A/R Totals - Standard Report	266	Insurance Transaction Analysis Report	148
Provider A/R Totals - Daily Report	264	Grand Total Amount of Insured Charges	
Co-pay Amount		Insurance Transaction Analysis Report	148
Standard Coverage Tables Report	310	Grand Total Amount of Patient Payments Received	
Utilization Report	354	Insurance Transaction Analysis Report	148
Insurance Coverage Tables Report	144	Guarantor Estimate Amount	
Credit Adjustment Amount		Collections Manager List	70
Insurance Carrier Production - Full Report	136	Insurance Estimate Amount	
Billing Statement	48	Collections Manager List	70
Credit Adjustment Amount for Insurance Plan		Insurance Estimated Amount	
Insurance Carrier Production - Summary Report	138	Walkout - Family Walkout	358
Insurance Carrier Production - Full Report	136	Insurance Payment Amount	
Credit Amount		Insurance Carrier Production - Full Report	136
Walkout - Family Walkout	358	Insurance Payment Amount for Insurance Plan	
		Insurance Carrier Production - Summary Report	138
		Insurance Carrier Production - Full Report	136

Amount (continued)

Lab Expense Amount		Outstanding Secondary Insurance Estimated Amount	
RVU Day Sheet Report	296	Treatment Plan Approval Status Report	318
Last Gratuity Amount		Treatment Plan Approval Report	316
Patient Route Slip	216	Patient Amount Aged >90	
Last Late Charge Amount		Patient Route Slip	216
Payment Agreement Report	224	Patient Amount Aged 0 - 30	
Last Payment Agreement Payment Amount		Patient Route Slip	216
Patient Route Slip	216	Patient Amount Aged 31 - 60	
Last Payment Amount		Patient Route Slip	216
Truth in Lending Disclosure Statement	320	Patient Amount Aged 61 - 90	
Aging/Credit Balance Report	6	Patient Route Slip	216
Last Payment Amount for Payment Agreement		Patient Estimated Insurance Portion	
Collections Manager List	70	Patient Route Slip	216
Late Charge Amount		Patient Suspended Credit Amount	
Analysis Summary Report - Daily	8	Patient Route Slip	216
Analysis Summary Report - Standard	12	Payment Agreement Amount	
Late Charge Report	150	Payment Agreement Report	224
Adjustment Summary Report	4	Payment Agreement Amount Past Due	
Late Charge Percent or Amount		Payment Agreement Report	224
Truth in Lending Disclosure Statement	320	Payment Agreement Last Payment Amount	
Loan Amount		Payment Agreement Report	224
Truth in Lending Disclosure Statement	320	Payment Agreement Next Payment Amount	
Maximum Primary Insurance Benefit Amount		Payment Agreement Report	224
Patient Route Slip	216	Payment Agreement Payment Amount	
Maximum Secondary Insurance Benefit Amount		Payment Agreement Amortization Schedule	222
Patient Route Slip	216	Payment Amount	
Monthly Charge Amount		Family Ledger Report	118
Future Due Payment Plan Report - Standard	128	Family Ledger Report (Single Family)	120
Next Appointment Procedure Amount		Insurance Transaction Analysis Report	148
Patient Route Slip	216	Operator Day Sheet Report	188
Next Appointment Production Amount		Patient Ledger Report	202
Patient Route Slip	216	Patient's Ledger Report	220
Next Appointment Total Amount		Truth in Lending Disclosure Statement	320
Patient Route Slip	216	Updated Dental Insurance Payment Table Report	352
Next Charge Amount (after 18 Months from Current Month)		Deposit Slip	108
Future Due Payment Plan Report - Monthly Totals	126	Payment Amount Due	
Next Payment Agreement Payment Due Amount		Coupon Book - Payment Agreements	79
Patient Route Slip	216	Coupon Book - Future Due Payments	78
Next Payment Plan Payment Amount		Payment Amount for Payment Type	
Letter Merge Reports	152	Day Sheet (Receipts) Report	98
Other Applied Credit Adjustment Amount		Payment Plan Total Amount	
Analysis Summary Report - Standard	12	Letter Merge Reports	152
Analysis Summary Report - Daily	8	Penalty or Payback Amount Collected for Patient	
Other Applied Insurance Payment Amount		UDS - Patient Related Revenue Report	336
Analysis Summary Report - Standard	12	Percent of Amount Aged 0 - 30	
Analysis Summary Report - Daily	8	Aging/Credit Balance Report	6
Other Applied Payment Amount		Percent of Amount Aged 121 - 150	
Analysis Summary Report - Daily	8	Aging/Credit Balance Report	6
Other Credit Special Adjustment Amount		Percent of Amount Aged 151 - 180	
Analysis Summary Report - Standard	12	Aging/Credit Balance Report	6
Analysis Summary Report - Daily	8	Percent of Amount Aged 31 - 60	
Other Retroactive Payment Amount Collected for Patient		Aging/Credit Balance Report	6
UDS - Patient Related Revenue Report	336	Percent of Amount Aged 61 - 90	
Outstanding Primary Insurance Estimated Amount		Aging/Credit Balance Report	6
Treatment Plan Approval Status Report	318	Percent of Amount Aged 90 - 120	
Treatment Plan Approval Report	316	Aging/Credit Balance Report	6
		Percent of Amount Aged Over 180	
		Aging/Credit Balance Report	6
		Percent of Insurance Estimate Amounts	
		Aging/Credit Balance Report	6

Amount (continued)

Please Pay Amount		Subtotal of Bad Debt Write-offs for Financial Class Type	
Walkout - Family Walkout	358	UDS - Patient Related Revenue Report	336
Pre-treatment Estimate Amount		Subtotal of Bad Debt Write-offs for Payer Category	
Patient Route Slip	216	UDS - Patient Related Revenue Report	336
Pre-Treatment Estimate Aging Report	252	Subtotal of Charges for Financial Class Type	
Pre-Treatment Estimates Not Sent Report	254	UDS - Patient Related Revenue Report	336
Secondary Pre-Treatment Estimates Not Created Report	308	Subtotal of Charges for Payer Category	
Insurance Transaction Analysis Report	148	UDS - Patient Related Revenue Report	336
Primary Insurance Estimated Amount		Subtotal of Other Retroactive Payment Amount Collected for Financial Class Type	
Treatment Plan Approval Status Report	318	UDS - Patient Related Revenue Report	336
Treatment Plan Approval Report	316	Subtotal of Other Retroactive Payment Amount Collected for Payer Category	
Primary Production Amount		UDS - Patient Related Revenue Report	336
Insurance Carrier Production - Full Report	136	Subtotal of Penalty or Payback Amount Collected for Financial Class Type	
Primary Production Amount for Insurance Plan		UDS - Patient Related Revenue Report	336
Insurance Carrier Production - Summary Report	138	Subtotal of Penalty or Payback Amount Collected for Payer Category	
Insurance Carrier Production - Full Report	136	UDS - Patient Related Revenue Report	336
Procedure Amount		Subtotal of Wrap Around or Reconciliation Amount Collected for Financial Class Type (Current Year)	
Patient List (Filtered)	206	UDS - Patient Related Revenue Report	336
Procedures Not Attached to Insurance Report	258	Subtotal of Wrap Around or Reconciliation Amount Collected for Financial Class Type (Previous Years)	
Production Summary Report	260	UDS - Patient Related Revenue Report	336
Provider Revenue - Allocations Report	274	Subtotal of Wrap Around or Reconciliation Amount Collected for Payer Category (Current Year)	
Provider Revenue - Charges Report	276	UDS - Patient Related Revenue Report	336
Provider Revenue - Credits Report	278	Subtotal of Wrap Around or Reconciliation Amount Collected for Payer Category (Previous Years)	
RVU Production Summary Report	298	UDS - Patient Related Revenue Report	336
Audit Report - Combined	32	Suspended Amount	
Production Amount		Suspended Credits Report	312
Referred By Doctor/Other Report	288	Suspended Amount on Ledger	
Referred By Patient Report	290	Suspended Credits Report	312
Provider A/R Totals - Daily Report	264	Suspended Credit Adjustment Amount	
Production Amount for Provider		Analysis Summary Report - Standard	12
Provider A/R Totals - Standard Report	266	Analysis Summary Report - Daily	8
Provider A/R Totals - Daily Report	264	Suspended Credit Amount	
Projected Amount of Remaining Benefits		Continuing Care Display List	76
Treatment Plan Approval Status Report	318	Suspended Credit Amount for Clinic	
Treatment Plan Approval Report	316	Aging/Credit Balance Report	6
Projected Amount of Remaining Benefits for Secondary Insurance		Suspended Insurance Payment Amount	
Treatment Plan Approval Status Report	318	Analysis Summary Report - Standard	12
Treatment Plan Approval Report	316	Analysis Summary Report - Daily	8
Remaining Payment Agreement Amount		Suspended Payment Amount	
Collections Manager List	70	Analysis Summary Report - Daily	8
Secondary Insurance Estimated Amount		Total Amount Aged 0 - 30	
Treatment Plan Approval Status Report	318	Collections Manager List	70
Treatment Plan Approval Report	316	Aging/Credit Balance Report	6
Secondary Production Amount		Total Amount Aged 121 - 150	
Insurance Carrier Production - Full Report	136	Aging/Credit Balance Report	6
Secondary Production Amount for Insurance Plan		Total Amount Aged 151 - 180	
Insurance Carrier Production - Summary Report	138	Aging/Credit Balance Report	6
Insurance Carrier Production - Full Report	136	Total Amount Aged 31 - 60	
Subtotal of Allowances for Financial Class Type		Collections Manager List	70
UDS - Patient Related Revenue Report	336	Aging/Credit Balance Report	6
Subtotal of Allowances for Payer Category		Total Amount Aged 61 - 90	
UDS - Patient Related Revenue Report	336	Collections Manager List	70
Subtotal of Amount Collected for Financial Class Type		Aging/Credit Balance Report	6
UDS - Patient Related Revenue Report	336	Total Amount Aged 61 - 90	
Subtotal of Amount Collected for Payer Category		Collections Manager List	70
UDS - Patient Related Revenue Report	336	Aging/Credit Balance Report	6

Amount (continued)

Total Amount Aged 90 - 120		Total Amount of Account Balances Aged 121 - 150 for Primary Pre-treatment Estimates	
Aging/Credit Balance Report	6	Pre-Treatment Estimate Aging Report	252
Total Amount Aged 91+		Total Amount of Account Balances Aged 121 - 150 for Secondary Pre-treatment Estimates	
Collections Manager List	70	Pre-Treatment Estimate Aging Report	252
Total Amount Aged Over 180		Total Amount of Account Balances Aged 121 - 150 with Claims	
Aging/Credit Balance Report	6	Insurance Claim Aging Report	140
Total Amount Billed to Insurance		Total Amount of Account Balances Aged 121 - 150 with Primary Claims	
Analysis Summary Report - Standard	12	Insurance Claim Aging Report	140
Collections Manager List	70	Total Amount of Account Balances Aged 121 - 150 with Secondary Claims	
Day Sheet Report	100	Insurance Claim Aging Report	140
Analysis Summary Report - Daily	8	Total Amount of Account Balances Aged 121 - 150 with Secondary Claims	
Total Amount Collected for Financial Class Type		Insurance Claim Aging Report	140
UDS - Patient Related Revenue Report	336	Total Amount of Account Balances Aged 151 - 180 for Pre-treatment Estimates	
Total Amount Collected for Patient		Pre-Treatment Estimate Aging Report	252
UDS - Patient Related Revenue Report	336	Total Amount of Account Balances Aged 151 - 180 for Primary Pre-treatment Estimates	
Total Amount Collected for Payer Category		Pre-Treatment Estimate Aging Report	252
UDS - Patient Related Revenue Report	336	Total Amount of Account Balances Aged 151 - 180 for Secondary Pre-treatment Estimates	
Total Amount Due for Payment Agreements		Pre-Treatment Estimate Aging Report	252
Collections Manager List	70	Total Amount of Account Balances Aged 151 - 180 with Claims	
Total Amount for Primary Pre-treatment Estimates		Insurance Claim Aging Report	140
Pre-Treatment Estimate Aging Report	252	Total Amount of Account Balances Aged 151 - 180 with Primary Claims	
Total Amount for Secondary Pre-treatment Estimates		Insurance Claim Aging Report	140
Pre-Treatment Estimate Aging Report	252	Total Amount of Account Balances Aged 151 - 180 with Secondary Claims	
Total Amount of - Adjustments (Collection)		Insurance Claim Aging Report	140
Provider A/R Totals - Standard Report	266	Total Amount of Account Balances Aged 181+ for Pre-treatment Estimates	
Provider A/R Totals - Daily Report	264	Pre-Treatment Estimate Aging Report	252
Total Amount of - Adjustments (Production)		Total Amount of Account Balances Aged 181+ for Primary Pre-treatment Estimates	
Provider A/R Totals - Standard Report	266	Pre-Treatment Estimate Aging Report	252
Provider A/R Totals - Daily Report	264	Pre-Treatment Estimate Aging Report	252
Total Amount of + Adjustments (Collection)		Total Amount of Account Balances Aged 181+ for Secondary Pre-treatment Estimates	
Provider A/R Totals - Standard Report	266	Pre-Treatment Estimate Aging Report	252
Provider A/R Totals - Daily Report	264	Total Amount of Account Balances Aged 181+ with Claims	
Total Amount of + Adjustments (Production)		Insurance Claim Aging Report	140
Provider A/R Totals - Standard Report	266	Total Amount of Account Balances Aged 181+ with Primary Claims	
Provider A/R Totals - Daily Report	264	Insurance Claim Aging Report	140
Total Amount of Account Bal		Total Amount of Account Balances Aged 181+ with Secondary Claims	
Collections Manager List	70	Insurance Claim Aging Report	140
Payment Agreement Report	224	Total Amount of Account Balances Aged 31 - 60 for Pre-treatment Estimates	
Aging/Credit Balance Report	6	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 1 - 30 for Pre-treatment Estimates		Total Amount of Account Balances Aged 31 - 60 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 1 - 30 for Primary Pre-treatment Estimates		Total Amount of Account Balances Aged 31 - 60 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 1 - 30 for Secondary Pre-treatment Estimates		Total Amount of Account Balances Aged 31 - 60 with Claims	
Pre-Treatment Estimate Aging Report	252	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 1 - 30 with Claims		Total Amount of Account Balances Aged 31 - 60 for Pre-treatment Estimates	
Insurance Claim Aging Report	140	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 1 - 30 with Primary Claims		Total Amount of Account Balances Aged 31 - 60 for Primary Pre-treatment Estimates	
Insurance Claim Aging Report	140	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 1 - 30 with Secondary Claims		Total Amount of Account Balances Aged 31 - 60 for Secondary Pre-treatment Estimates	
Insurance Claim Aging Report	140	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 121 - 150 for Pre-treatment Estimates		Pre-Treatment Estimate Aging Report	252
Pre-Treatment Estimate Aging Report	252		

Amount (continued)

Total Amount of Account Balances Aged 31 - 60 with Claims		Total Amount of Account Balances with Secondary Pre-treatment Estimates	
Insurance Claim Aging Report	140	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 31 - 60 with Primary Claims		Total Amount of Adjustment Type	
Insurance Claim Aging Report	140	Daily Summary Report	88
Total Amount of Account Balances Aged 31 - 60 with Secondary Claims		Total Amount of Adjustment Types	
Insurance Claim Aging Report	140	Adjustment Summary Report	4
Total Amount of Account Balances Aged 61 - 90 for Pre-treatment Estimates		Total Amount of Adjustments	
Pre-Treatment Estimate Aging Report	252	Day Sheet (Adjustments) Report	90
Total Amount of Account Balances Aged 61 - 90 for Primary Pre-treatment Estimates		Daily Summary Report	88
Pre-Treatment Estimate Aging Report	252	Total Amount of Adjustments for Clinic	
Total Amount of Account Balances Aged 61 - 90 for Secondary Pre-treatment Estimates		Day Sheet (Adjustments) Report	90
Pre-Treatment Estimate Aging Report	252	Total Amount of Adjustments for Provider	
Total Amount of Account Balances Aged 61 - 90 with Claims		Day Sheet (Adjustments) Report	90
Insurance Claim Aging Report	140	Total Amount of Allowances for Financial Class Type	
Total Amount of Account Balances Aged 61 - 90 with Primary Claims		UDS - Patient Related Revenue Report	336
Insurance Claim Aging Report	140	Total Amount of Allowances for Patient	
Total Amount of Account Balances Aged 61 - 90 with Secondary Claims		UDS - Patient Related Revenue Report	336
Insurance Claim Aging Report	140	Total Amount of Allowances for Payer Category	
Total Amount of Account Balances Aged 91 - 120 for Pre-treatment Estimates		UDS - Patient Related Revenue Report	336
Pre-Treatment Estimate Aging Report	252	Total Amount of Applied Credit Adjustments	
Total Amount of Account Balances Aged 91 - 120 for Primary Pre-treatment Estimates		Analysis Summary Report - Standard	12
Pre-Treatment Estimate Aging Report	252	Day Sheet Report	100
Total Amount of Account Balances Aged 91 - 120 for Secondary Pre-treatment Estimates		Analysis Summary Report - Daily	8
Pre-Treatment Estimate Aging Report	252	Total Amount of Applied Credit Adjustments for Previous Month	
Total Amount of Account Balances Aged 91 - 120 with Claims		Day Sheet (Charges and Receipts) Report	94
Insurance Claim Aging Report	140	Total Amount of Applied Insurance Payments	
Total Amount of Account Balances Aged 91 - 120 with Primary Claims		Analysis Summary Report - Standard	12
Insurance Claim Aging Report	140	Day Sheet Report	100
Total Amount of Account Balances Aged 91 - 120 with Secondary Claims		Analysis Summary Report - Daily	8
Insurance Claim Aging Report	140	Total Amount of Applied Payments	
Total Amount of Account Balances with Claims		Analysis Summary Report - Standard	12
Insurance Claim Aging Report	140	Day Sheet Report	100
Total Amount of Account Balances with Pre-treatment Estimates		Analysis Summary Report - Daily	8
Pre-Treatment Estimate Aging Report	252	Total Amount of Applied Payments for Previous Month	
Total Amount of Account Balances with Primary Claims		Day Sheet (Charges and Receipts) Report	94
Insurance Claim Aging Report	140	Total Amount of Bad Debt Write-offs for Financial Class Type	
Total Amount of Account Balances with Primary Pre-treatment Estimates		UDS - Patient Related Revenue Report	336
Pre-Treatment Estimate Aging Report	252	Total Amount of Bad Debt Write-offs for Patient	
Total Amount of Account Balances with Secondary Claims		UDS - Patient Related Revenue Report	336
Insurance Claim Aging Report	140	Total Amount of Bad Debt Write-offs for Payer Category	
Total Amount of Account Balances with Pre-treatment Estimates		UDS - Patient Related Revenue Report	336
Pre-Treatment Estimate Aging Report	252	Total Amount of Balances Remaining for Payment Agreements	
Total Amount of Account Balances with Primary Claims		Payment Agreement Report	224
Insurance Claim Aging Report	140	Total Amount of Beginning Balances	
Total Amount of Account Balances with Primary Pre-treatment Estimates		Analysis Summary Report - Standard	12
Pre-Treatment Estimate Aging Report	252	Provider A/R Totals - Daily Report	264
Total Amount of Account Balances with Secondary Claims		Provider A/R Totals - Standard Report	266
Insurance Claim Aging Report	140	Analysis Summary Report - Daily	8
Total Amount of Account Balances with Secondary Pre-treatment Estimates		Total Amount of Cash Payments	
Pre-Treatment Estimate Aging Report	252	Operator Day Sheet Report	188
Total Amount of Account Balances with Primary Claims		Total Amount of Charge Adjustments	
Insurance Claim Aging Report	140	Analysis Summary Report - Standard	12
Total Amount of Account Balances with Primary Pre-treatment Estimates		Day Sheet Report	100
Pre-Treatment Estimate Aging Report	252	Insurance Transaction Analysis Report	148
Total Amount of Account Balances with Secondary Claims		Operator Day Sheet Report	188
Insurance Claim Aging Report	140	Analysis Summary Report - Daily	8

Amount (continued)

Total Amount of Charge Adjustments for Previous Month		Total Amount of Current Applied Payments	
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Total Amount of Current Charge Adjustments	
Total Amount of Charges		Day Sheet (Charges and Receipts) Report	94
Day Sheet Report	100	Day Sheet (Charges and Receipts) Report	94
Future Due Payment Plan Report - Monthly Totals	126	Total Amount of Current Charges	
Operator Day Sheet Report	188	Day Sheet (Charges and Receipts) Report	94
Provider A/R Totals - Daily Report	264	Total Amount of Current Charges Billed to Insurance	
Provider A/R Totals - Standard Report	266	Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Daily	8	Total Amount of Current Charges Compared to Fee Schedule	
Total Amount of Charges Billed to Insurance for Previous Month		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Total Amount of Current Finance Charges	
Total Amount of Charges for Financial Class Type		Day Sheet (Charges and Receipts) Report	94
UDS - Patient Related Revenue Report	336	Total Amount of Current Late Charges	
Total Amount of Charges for Patient		Day Sheet (Charges and Receipts) Report	94
UDS - Patient Related Revenue Report	336	Total Amount of Current Suspended Credit Adjustments	
Total Amount of Charges for Payer Category		Day Sheet (Charges and Receipts) Report	94
UDS - Patient Related Revenue Report	336	Total Amount of Current Suspended Payments	
Total Amount of Charges for Previous Month		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Total Amount of Debit Adjustments	
Total Amount of Charges for Today's Completed Work		Day Sheet (Adjustments) Report	90
Patient Chart Printout	196	Insurance Carrier Production - Full Report	136
Total Amount of Charges Remaining (after 18 Mos from Curr Mo)		Insurance Carrier Production - Summary Report	138
Future Due Payment Plan Report - Monthly Totals	126	Adjustment Summary Report	4
Total Amount of Check Payments		Total Amount of Debit Initial Balances	
Operator Day Sheet Report	188	Analysis Summary Report - Standard	12
Total Amount of Completed Procedures		Day Sheet Report	100
Walkout - Doctor's Statement	356	Analysis Summary Report - Daily	8
Procedures Not Attached to Insurance Report	258	Total Amount of Debit Initial Balances (Production)	
Total Amount of Co-pays		Provider A/R Totals - Standard Report	266
Utilization Report	354	Provider A/R Totals - Daily Report	264
Total Amount of Credit Adjustments		Total Amount of Debit Special Adjustments	
Day Sheet (Adjustments) Report	90	Analysis Summary Report - Standard	12
Insurance Carrier Production - Full Report	136	Day Sheet Report	100
Insurance Carrier Production - Summary Report	138	Provider A/R Totals - Daily Report	264
Insurance Transaction Analysis Report	148	Provider A/R Totals - Standard Report	266
Operator Day Sheet Report	188	Analysis Summary Report - Daily	8
Adjustment Summary Report	4	Total Amount of Dental Insurance Portions	
Total Amount of Credit Card Payments		Patient Chart Printout	196
Operator Day Sheet Report	188	Total Amount of Deposit	
Total Amount of Credit Initial Balances		Deposit Slip	108
Analysis Summary Report - Standard	12	Total Amount of Ending Balances	
Day Sheet Report	100	Analysis Summary Report - Standard	12
Provider A/R Totals - Daily Report	264	Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266	Provider A/R Totals - Standard Report	266
Analysis Summary Report - Daily	8	Analysis Summary Report - Daily	8
Total Amount of Credit Special Adjustments		Total Amount of Estimated Insurance Portion for Primary and Secondary Claims	
Analysis Summary Report - Standard	12	Insurance Claim Aging Report	140
Day Sheet Report	100	Total Amount of Estimated Insurance Portion for Primary Claims	
Provider A/R Totals - Daily Report	264	Insurance Claim Aging Report	140
Provider A/R Totals - Standard Report	266	Total Amount of Estimated Insurance Portion for Secondary Claims	
Analysis Summary Report - Daily	8	Insurance Claim Aging Report	140
Total Amount of Current Applied Credit Adjustments		Total Amount of Fees	
Day Sheet (Charges and Receipts) Report	94	Utilization Report	354
		RVU Utilization Report	304

Amount (continued)

Total Amount of Fees - Co-pays Utilization Report	354	Total Amount of Medicaid Procedures RVU Production Summary Report	298
Total Amount of Fees - RVU RVU Utilization Report	304	Production Summary Report	260
Total Amount of Finance Charges Analysis Summary Report - Daily	8	Total Amount of MTD Applied Credit Adjustments Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Standard	12	Total Amount of MTD Applied Payments Day Sheet (Charges and Receipts) Report	94
Day Sheet (Adjustments) Report	90	Total Amount of MTD Charge Adjustments Day Sheet (Charges and Receipts) Report	94
Day Sheet Report	100	Day Sheet (Charges and Receipts) Report	94
Finance Charge Report	124	Total Amount of MTD Charges Day Sheet (Charges and Receipts) Report	94
Operator Day Sheet Report	188	Total Amount of MTD Charges Billed to Insurance Day Sheet (Charges and Receipts) Report	94
Provider A/R Totals - Daily Report	264	Total Amount of MTD Finance Charges Day Sheet (Charges and Receipts) Report	94
Provider A/R Totals - Standard Report	266	Total Amount of MTD Late Charges Day Sheet (Charges and Receipts) Report	94
Truth in Lending Disclosure Statement	320	Total Amount of MTD Suspended Credit Adjustments Day Sheet (Charges and Receipts) Report	94
Adjustment Summary Report	4	Total Amount of MTD Suspended Payments Day Sheet (Charges and Receipts) Report	94
Total Amount of Finance Charges for Previous Month Day Sheet (Charges and Receipts) Report	94	Total Amount of Net Change Analysis Summary Report - Standard	12
Total Amount of Guarantor Estimates Collections Manager List	70	Provider A/R Totals - Daily Report	264
Total Amount of Guarantor Portions Aging/Credit Balance Report	6	Provider A/R Totals - Standard Report	266
Total Amount of Insurance Estimates Collections Manager List	70	Analysis Summary Report - Daily	8
Aging/Credit Balance Report	6	Total Amount of Non-Medicaid Procedures RVU Production Summary Report	298
Total Amount of Insurance Payments Insurance Carrier Production - Summary Report	138	Production Summary Report	260
Operator Day Sheet Report	188	Total Amount of Other Applied Credit Adjustments Analysis Summary Report - Standard	12
Provider A/R Totals - Daily Report	264	Day Sheet Report	100
Provider A/R Totals - Standard Report	266	Analysis Summary Report - Daily	8
Insurance Carrier Production - Full Report	136	Total Amount of Other Applied Credit Initial Balances Day Sheet Report	100
Total Amount of Insurance Payments Received Insurance Transaction Analysis Report	148	Total Amount of Other Applied Credit Special Adjustments Day Sheet Report	100
Total Amount of Insured Charges Insurance Transaction Analysis Report	148	Total Amount of Other Applied Insurance Payments Analysis Summary Report - Standard	12
Total Amount of Lab Expenses RVU Day Sheet Report	296	Day Sheet Report	100
Total Amount of Lab Expenses of Medicaid Procedures RVU Production Summary Report	298	Analysis Summary Report - Daily	8
Total Amount of Lab Expenses of Non-Medicaid Procedures RVU Production Summary Report	298	Total Amount of Other Applied Payments Analysis Summary Report - Standard	12
Total Amount of Lab Expenses of Procedures RVU Production Summary Report	298	Day Sheet Report	100
Total Amount of Last Payments for Payment Agreements Collections Manager List	70	Analysis Summary Report - Daily	8
Total Amount of Late Charges Analysis Summary Report - Daily	8	Total Amount of Other Credit Initial Balances Analysis Summary Report - Standard	12
Analysis Summary Report - Standard	12	Analysis Summary Report - Daily	8
Day Sheet (Adjustments) Report	90	Total Amount of Other Credit Special Adjustments Analysis Summary Report - Standard	12
Day Sheet Report	100	Analysis Summary Report - Daily	8
Late Charge Report	150	Total Amount of Patient Payments Received Insurance Transaction Analysis Report	148
Provider A/R Totals - Daily Report	264	Total Amount of Payment Agreement Payments Due Payment Agreement Report	224
Provider A/R Totals - Standard Report	266	Total Amount of Payment Agreements Payment Agreement Report	224
Adjustment Summary Report	4	Total Amount of Payment Type Deposit Slip	108
Total Amount of Late Charges for Previous Month Day Sheet (Charges and Receipts) Report	94	Daily Summary Report	88
Total Amount of Medicaid Payments Operator Day Sheet Report	188		

Amount (continued)

Total Amount of Payment Type for Clinic Deposit Slip	108	Total Amount of Secondary Pre-treatment Estimates not Sent	
Total Amount of Payment Type for Operator Deposit Slip	108	Pre-Treatment Estimates Not Sent Report	254
Total Amount of Payments		Total Amount of Secondary Production Insurance Carrier Production - Summary Report	138
Day Sheet (Receipts) Report	98	Insurance Carrier Production - Full Report	136
Operator Day Sheet Report	188	Total Amount of Sliding Discounts for Financial Class Type	
Payment Summary Report	226	UDS - Patient Related Revenue Report	336
Provider A/R Totals - Daily Report	264	Total Amount of Sliding Discounts for Patient	
Provider A/R Totals - Standard Report	266	UDS - Patient Related Revenue Report	336
Truth in Lending Disclosure Statement	320	Total Amount of Sliding Discounts for Payer Category	
Daily Summary Report	88	UDS - Patient Related Revenue Report	336
Total Amount of Payments for Clinic		Total Amount of Suspended Credit Adjustments	
Day Sheet (Receipts) Report	98	Analysis Summary Report - Standard	12
Total Amount of Payments for Initial Provider		Day Sheet Report	100
Day Sheet (Receipts) Report	98	Analysis Summary Report - Daily	8
Total Amount of Payments for Payment Type		Total Amount of Suspended Credit Adjustments for Previous Month	
Day Sheet (Receipts) Report	98	Day Sheet (Charges and Receipts) Report	94
Total Amount of Payments for Provider		Total Amount of Suspended Credits for Clinic	
Day Sheet (Receipts) Report	98	Suspended Credits Report	312
Total Amount of Pre-treatment Estimates		Total Amount of Suspended Insurance Payments	
Pre-Treatment Estimate Aging Report	252	Analysis Summary Report - Standard	12
Total Amount of Pre-treatment Estimates not Sent		Day Sheet Report	100
Pre-Treatment Estimates Not Sent Report	254	Analysis Summary Report - Daily	8
Total Amount of Primary and Secondary Claims not Sent		Total Amount of Suspended Payments	
Insurance Claims Not Sent Report	142	Analysis Summary Report - Standard	12
Total Amount of Primary Claims not Sent		Day Sheet Report	100
Insurance Claims Not Sent Report	142	Analysis Summary Report - Daily	8
Total Amount of Primary Insurance Portion for Case		Total Amount of Suspended Payments for Previous Month	
Treatment Case Report	314	Day Sheet (Charges and Receipts) Report	94
Total Amount of Primary Pre-treatment Estimates not Sent		Total Amount of Transactions	
Pre-Treatment Estimates Not Sent Report	254	Credit Card Transaction Report	80
Total Amount of Primary Production		Total Amount of Treatment Plan	
Insurance Carrier Production - Summary Report	138	Treatment Case Report	314
Insurance Carrier Production - Full Report	136	Patient Treatment Case Report	218
Total Amount of Procedures		Total Amount of Treatment Plans	
RVU Production Summary Report	298	Treatment Plan Approval Status Report	318
Production Summary Report	260	Treatment Plan Approval Report	316
Total Amount of Remaining Payment Agreements		Total Amount of Treatment-planned Procedures	
Collections Manager List	70	Practice Treatment Case Report	248
Total Amount of RVUs		Patient Chart Printout	196
RVU Utilization Report	304	Total Amount of Unscheduled Treatment Plans	
Total Amount of Scheduled Treatment Plans		Unscheduled Treatment Plans (Detailed) Report	350
Treatment Plan Approval Status Report	318	Unscheduled Treatment Plans (Condensed) Report	348
Treatment Plan Approval Report	316	Total Amount of YTD Applied Payments	
Total Amount of Secondary Claims not Created		Day Sheet (Charges and Receipts) Report	94
Secondary Insurance Claims Not Created Report	306	Total Amount of YTD Charge Adjustments	
Total Amount of Secondary Claims not Sent		Day Sheet (Charges and Receipts) Report	94
Insurance Claims Not Sent Report	142	Day Sheet (Charges and Receipts) Report	94
Total Amount of Secondary Insurance Portion for Case		Total Amount of YTD Charges	
Treatment Case Report	314	Day Sheet (Charges and Receipts) Report	94
Total Amount of Secondary Pre-treatment Estimates not Created		Total Amount of YTD Charges Billed to Insurance	
Secondary Pre-Treatment Estimates Not Created Report	308	Day Sheet (Charges and Receipts) Report	94
		Total Amount of YTD Finance Charges	
		Day Sheet (Charges and Receipts) Report	94

Amount (continued)

Total Amount of YTD Finance Charges for Family		Provider Revenue - Summary Report	280
Family Ledger Report (Single Family)	120	Provider Revenue - Allocations Report	274
Total Amount of YTD Late Charges		Total Revenue from Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94	Provider Revenue - Charges Report	276
Total Amount of YTD Late Charges for Family		Provider Revenue - Credits Report	278
Family Ledger Report (Single Family)	120	Provider Revenue - Summary Report	280
Family Ledger Report	118	Provider Revenue - Allocations Report	274
Total Amount of YTD Payments for Family		Total Revenue from Insurance	
Family Ledger Report (Single Family)	120	Provider Revenue - Charges Report	276
Family Ledger Report	118	Provider Revenue - Credits Report	278
Total Amount of YTD Suspended Credit Adjustments		Provider Revenue - Summary Report	280
Day Sheet (Charges and Receipts) Report	94	Provider Revenue - Allocations Report	274
Total Amount of YTD Suspended Payments		Total Revenue from Non-insurance	
Day Sheet (Charges and Receipts) Report	94	Provider Revenue - Charges Report	276
Total Amount Remaining		Provider Revenue - Credits Report	278
Future Due Payment Plan Report - Standard	128	Provider Revenue - Summary Report	280
Total Case Amount		Provider Revenue - Allocations Report	274
Patient Proposed Treatment Case Report (Your		Total RVU	
Care Plan)	212	RVU Day Sheet Report	296
Total Collection Amount		Total Suspended Credits	
Provider A/R Totals - Standard Report	266	Aging/Credit Balance Report	6
Provider A/R Totals - Daily Report	264	Total Wrap Around or Reconciliation Amount Collected	
Total Estimated Amount of Patient's Portion		for Financial Class Type (Current Year)	
Patient Proposed Treatment Case Report (Your		UDS - Patient Related Revenue Report	336
Care Plan)	212	Total Wrap Around or Reconciliation Amount Collected	
Total Estimated Insurance Portion		for Financial Class Type (Previous Years)	
Patient Proposed Treatment Case Report (Your		UDS - Patient Related Revenue Report	336
Care Plan)	212	Total Wrap Around or Reconciliation Amount Collected	
Total Fee for Case		for Patient (Current Year)	
Treatment Case Report	314	UDS - Patient Related Revenue Report	336
Total Fee from Alternate Fee Schedule for Case		Total Wrap Around or Reconciliation Amount Collected	
Treatment Case Report	314	for Patient (Previous Years)	
Total Other Retroactive Payment Amount Collected for		UDS - Patient Related Revenue Report	336
Financial Class Type		Total Wrap Around or Reconciliation Amount Collected	
UDS - Patient Related Revenue Report	336	for Payer Category (Current Year)	
Total Other Retroactive Payment Amount Collected for		UDS - Patient Related Revenue Report	336
Patient		Total Wrap Around or Reconciliation Amount Collected	
UDS - Patient Related Revenue Report	336	for Payer Category (Previous Years)	
Total Other Retroactive Payment Amount Collected for		UDS - Patient Related Revenue Report	336
Payer Category		Total YTD Finance Charges for Family	
UDS - Patient Related Revenue Report	336	Family Ledger Report	118
Total Penalty or Payback Amount Collected for Financial		Transaction Amount	
Class Type		Credit Card Transaction Report	80
UDS - Patient Related Revenue Report	336	Provider Revenue - Allocations Report	274
Total Penalty or Payback Amount Collected for Patient		Provider Revenue - Charges Report	276
UDS - Patient Related Revenue Report	336	Provider Revenue - Credits Report	278
Total Penalty or Payback Amount Collected for Payer		Suspended Credits Report	312
Category		Audit Report - Transactions	38
UDS - Patient Related Revenue Report	336	Transaction Amount Change	
Total Production Amount		Audit Report - Transactions	38
Provider A/R Totals - Standard Report	266	Treatment Plan Amount	
Provider A/R Totals - Daily Report	264	Referred By Patient Report	290
Total Revenue		Unscheduled Treatment Plans (Condensed) Re-	
Provider Revenue - Charges Report	276	port	348
Provider Revenue - Credits Report	278	Unscheduled Treatment Plans (Detailed) Report	
Provider Revenue - Summary Report	280	350	
Provider Revenue - Allocations Report	274	Referred By Doctor/Other Report	288
Total Revenue for Provider		Treatment-planned Procedure Amount	
Provider Revenue - Charges Report	276	Unscheduled Treatment Plans (Detailed) Report	
Provider Revenue - Credits Report	278	350	
		Wrap Around or Reconciliation Amount Collected for	
		Patient (Current Year)	
		UDS - Patient Related Revenue Report	336

Amount (continued)

Wrap Around or Reconciliation Amount Collected for Patient (Previous Years)	
UDS - Patient Related Revenue Report	336

Annual

Amount of Annual Primary Insurance Plan Benefits for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Annual Secondary Insurance Plan Benefits for Family	
Treatment Case Report	314
Amount of Annual Secondary Insurance Plan Benefits for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218

Annual Percentage Rate

Annual Percentage Rate	
Truth in Lending Disclosure Statement	320

API

Number of Patients Provided API Access to Electronic Health Information	
Meaningful Use Measure Calculation List	156
Number of Patients who Accessed Electronic Health Information with API	
Meaningful Use Measure Calculation List	156

Applied

Amount of Applied Credit Adjustments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Applied Credit Adjustments for Previous Month for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Applied Credit Adjustments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Applied Insurance Payments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Applied Insurance Payments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Applied Payments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Applied Payments for Previous Month for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Applied Payments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Current Applied Credit Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Current Applied Payments for Provider	
Day Sheet (Charges and Receipts) Report	94

Amount of MTD Applied Credit Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of MTD Applied Payments for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Other Applied Credit Adjustments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Other Applied Credit Adjustments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Other Applied Credit Initial Balances for Clinic	
Day Sheet Report	100
Amount of Other Applied Credit Initial Balances for Provider	
Day Sheet Report	100
Amount of Other Applied Credit Special Adjustments for Clinic	
Day Sheet Report	100
Amount of Other Applied Credit Special Adjustments for Provider	
Day Sheet Report	100
Amount of Other Applied Insurance Payments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Other Applied Insurance Payments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Other Applied Payments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Other Applied Payments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of YTD Applied Credit Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of YTD Applied Payments for Provider	
Day Sheet (Charges and Receipts) Report	94
Applied Credit Adjustment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Applied Insurance Payment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Applied Payment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Estimated Amount of Deductibles to Be Applied	
Treatment Case Report	314
Patient Treatment Case Report	218

Applied (continued)

Other Applied Credit Adjustment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Other Applied Insurance Payment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Other Applied Payment	
Analysis Summary Report - Standard	12
Other Applied Payment Amount	
Analysis Summary Report - Daily	8
Payment Agreement Payment Portion Applied to Interest	
Payment Agreement Amortization Schedule	222
Payment Agreement Payment Portion Applied to Principle	
Payment Agreement Amortization Schedule	222
Total Amount of Applied Credit Adjustments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Applied Credit Adjustments for Previous Month	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Applied Insurance Payments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Applied Payments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Applied Payments for Previous Month	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Applied Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Applied Payments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of MTD Applied Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of MTD Applied Payments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Other Applied Credit Adjustments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Other Applied Credit Initial Balances	
Day Sheet Report	100
Total Amount of Other Applied Credit Special Adjustments	
Day Sheet Report	100
Total Amount of Other Applied Insurance Payments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Other Applied Payments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of YTD Applied Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94

Applied Credit Adjustment

Amount of Other Applied Credit Adjustments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Other Applied Credit Adjustments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of YTD Applied Credit Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94
Applied Credit Adjustment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Other Applied Credit Adjustment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Total Amount of Applied Credit Adjustments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Applied Credit Adjustments for Previous Month	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Applied Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of MTD Applied Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Other Applied Credit Adjustments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of YTD Applied Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94

Applied Credit Special Adjustment

Amount of Other Applied Credit Special Adjustments for Clinic	
Day Sheet Report	100
Amount of Other Applied Credit Special Adjustments for Provider	
Day Sheet Report	100
Total Amount of Other Applied Credit Special Adjustments	
Day Sheet Report	100

Applied Initial Balance

Amount of Other Applied Credit Initial Balances for Clinic	
Day Sheet Report	100
Amount of Other Applied Credit Initial Balances for Provider	
Day Sheet Report	100
Total Amount of Other Applied Credit Initial Balances	
Day Sheet Report	100

Applied Insurance Payment

Amount of Other Applied Insurance Payments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8

Applied Insurance Payment (continued)

Amount of Other Applied Insurance Payments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Applied Insurance Payment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Other Applied Insurance Payment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Total Amount of Applied Insurance Payments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Other Applied Insurance Payments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Applied Payment	
Amount of Other Applied Payments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Other Applied Payments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of YTD Applied Payments for Provider	
Day Sheet (Charges and Receipts) Report	94
Applied Payment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Other Applied Payment	
Analysis Summary Report - Standard	12
Other Applied Payment Amount	
Analysis Summary Report - Daily	8
Payment Agreement Payment Portion Applied to Interest	
Payment Agreement Amortization Schedule	222
Payment Agreement Payment Portion Applied to Principle	
Payment Agreement Amortization Schedule	222
Total Amount of Applied Payments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Applied Payments for Previous Month	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Applied Payments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of MTD Applied Payments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Other Applied Payments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of YTD Applied Payments	
Day Sheet (Charges and Receipts) Report	94

Appointment

Address of Patient on Appointment	
Letter Merge Reports	152
Appointment Amount	
Audit Report - Appointments	26
Appointment Amount Change	
Audit Report - Appointments	26
Appointment Checklist Items	
Custom Practice Information Report	82
Appointment Date	
Appointment Reminder Cards	18
As Soon As Possible List	22
Audit Report - Appointments	26
Daily Appointment List (DX1)	84
Daily Appointment List Report	86
Letter Merge Reports	152
Operatory Appointment List Report	190
Patient List (Filtered)	206
Treatment Plan Approval Report	316
Treatment Plan Approval Status Report	318
Walkout - Family Walkout	358
Appointment Cycle Time Report	16
Appointment Date and Time	
Insurance Eligibility Report	146
Appointment Date Change	
Audit Report - Appointments	26
Appointment Length	
Audit Report - Appointments	26
Daily Appointment List (DX1)	84
Daily Appointment List Report	86
Operatory Appointment List Report	190
Unscheduled Appointment List (DX1)	344
Unscheduled Appointment List (OM)	346
As Soon As Possible List	22
Appointment Length Change	
Audit Report - Appointments	26
Appointment Note	
Patient Notes Report	208
Appointment Notes	
Appointment Book View Printout	14
Appointment Production Amount	
Appointment Book View Printout	14
Appointment Production Type	
Audit Report - Appointments	26
Multi-Code List	182
Procedure Code List	256
Appointment Book View Printout	14
Appointment Production Type Change	
Audit Report - Appointments	26
Appointment Provider	
Audit Report - Appointments	26
Daily Appointment List (DX1)	84
Daily Appointment List Report	86
Letter Merge Reports	152
Letter Merge Reports	152
Operatory Appointment List Report	190
Patient List (Filtered)	206
As Soon As Possible List	22
Appointment Provider Change	
Audit Report - Appointments	26

Appointment (continued)

Appointment Provider ID		Future Reminder Date	
Letter Merge Reports	152	Collections Manager List	70
Appointment Book View Printout	14	Future Reminder Type	
Appointment Reason		Collections Manager List	70
As Soon As Possible List	22	Inserted Appointment	
Daily Appointment List (DX1)	84	Audit Report - Appointments	26
Daily Appointment List Report	86	Last Missed Appointment Date	
Letter Merge Reports	152	Patient Route Slip	216
Operatory Appointment List Report	190	Length in Appointment Status	
Unscheduled Appointment List (DX1)	344	Appointment Cycle Time Report	16
Unscheduled Appointment List (OM)	346	Next Appointment ADA Code	
Walkout - Family Walkout	358	Patient Route Slip	216
Appointment Book View Printout	14	Next Appointment ADA Code Description	
Appointment Status		Patient Route Slip	216
As Soon As Possible List	22	Next Appointment Date	
Audit Report - Appointments	26	Patient Route Slip	216
Daily Appointment List (DX1)	84	Next Appointment Length	
Daily Appointment List Report	86	Patient Route Slip	216
Operatory Appointment List Report	190	Next Appointment Note	
Patient Chart and Progress Notes Printout	194	Patient Route Slip	216
Unscheduled Appointment List (DX1)	344	Next Appointment Operator ID	
Unscheduled Appointment List (OM)	346	Patient Route Slip	216
Appointment Cycle Time Report	16	Next Appointment Procedure Amount	
Appointment Status Change		Patient Route Slip	216
Audit Report - Appointments	26	Next Appointment Procedure Date	
Appointment Statuses		Patient Route Slip	216
Custom Practice Information Report	82	Next Appointment Production Amount	
Appointment Time		Patient Route Slip	216
As Soon As Possible List	22	Next Appointment Provider ID	
Audit Report - Appointments	26	Patient Route Slip	216
Daily Appointment List (DX1)	84	Next Appointment Status	
Daily Appointment List Report	86	Patient Route Slip	216
Letter Merge Reports	152	Next Appointment Time	
Operatory Appointment List Report	190	Patient Route Slip	216
Patient List (Filtered)	206	Next Appointment Total Amount	
Walkout - Family Walkout	358	Patient Route Slip	216
Appointment Reminder Cards	18	Next Appointment Treatment Area	
Appointment Time Change		Patient Route Slip	216
Audit Report - Appointments	26	Next Appointment Treatment Plan Visit	
Appointment Type		Patient Route Slip	216
Audit Report - Appointments	26	Next Continuing Care Appointment Date	
Appointment Cycle Time Report	16	Patient Route Slip	216
Appointment Type Change		Letter Merge Reports	152
Audit Report - Appointments	26	Next Continuing Care Appointment Provider	
Continuing Care Appointment Date		Letter Merge Reports	152
Continuing Care Display List	76	Next Continuing Care Appointment Reason	
Date Appointment Broken		Letter Merge Reports	152
Unscheduled Appointment List (OM)	346	Next Continuing Care Appointment Time	
Unscheduled Appointment List (DX1)	344	Letter Merge Reports	152
Deleted Appointment		Number of Appointments in Appointment Status for or Longer than Length of Time	
Audit Report - Appointments	26	Appointment Statistics Report	20
Future Appointment Date		Number of Appointments in Appointment Status Less than Length of Time	
Patient Route Slip	216	Appointment Statistics Report	20
Future Appointment Provider ID		Number of Broken Appointments	
Patient Route Slip	216	Appointment Statistics Report	20
Future Appointment Reason		Number of Late Appointments	
Patient Route Slip	216	Appointment Statistics Report	20
Future Appointment Time		Number of Missed Appointments	
Patient Route Slip	216	Patient Route Slip	216

Appointment (continued)

Number of New Appointments		Number of Appointments in Appointment Status Less than Length of Time	
Daily Summary Report	88	Appointment Statistics Report	20
Number of On Time Appointments		Percent of Appointments in Appointment Status for or Longer than Length of Time	
Appointment Statistics Report	20	Appointment Statistics Report	20
Number of Patients <6 or 65+ Years who Received Appointment Reminders		Appointment Type	
Meaningful Use Measure Calculation List	156	Appointment Type	
Number of Scheduled Treatment-planned Procedures		Audit Report - Appointments	26
Practice Treatment Case Report	248	Appointment Cycle Time Report	16
Number of Unscheduled Appointments Listed		Appointment Type Change	
Unscheduled Appointment List (OM)	346	Audit Report - Appointments	26
Unscheduled Appointment List (DX1)	344	Approval Status	
Number of Wait/Will Call Appointments		Treatment Plan Approval Status	
Appointment Statistics Report	20	Treatment Plan Approval Report	316
Patient Name on Appointment		Treatment Plan Approval Status Report	318
Letter Merge Reports	152	Patient Chart and Progress Notes Printout	194
Percent Broken Appointments		APR	
Appointment Statistics Report	20	Annual Percentage Rate	
Percent Late Appointments		Truth in Lending Disclosure Statement	320
Appointment Statistics Report	20	Archived	
Percent of Appointments in Appointment Status for or Longer than Length of Time		Total Archived New Patients	
Appointment Statistics Report	20	New Patient List	184
Phone Number of Patient on Appointment		Attached	
Letter Merge Reports	152	Date Attached	
Reason Appointment Broken		Document Center List	114
Unscheduled Appointment List (DX1)	344	Attestation	
Scheduled and/or Unscheduled Appointment		Number of Patients with Medication Allergies or Attestations of No Known Medication Allergies	
Unscheduled Treatment Plans (Detailed) Report	350	Meaningful Use Measure Calculation List	156
Unscheduled Treatment Plans (Condensed) Report	348	Number of Patients with Medications or Attestations of No Known Medications	
Total Length in Appointment Statuses		Meaningful Use Measure Calculation List	156
Appointment Cycle Time Report	16	Number of Patients with Problems or Attestations of No Known Problems	
Total Number of Appointments		Meaningful Use Measure Calculation List	156
As Soon As Possible List	22	Audit	
Appointment Statistics Report	20	Appointment Amount Change	
Total Number of Scheduled Appointments		Audit Report - Appointments	26
Appointment Statistics Report	20	Appointment Date Change	
Appointment Book		Audit Report - Appointments	26
Day Note		Appointment Length Change	
Appointment Book View Printout	14	Audit Report - Appointments	26
Time Blocks		Appointment Production Type Change	
Appointment Book View Printout	14	Audit Report - Appointments	26
Time Units		Appointment Provider Change	
Procedure Code List	256	Audit Report - Appointments	26
Multi-Code List	182	Appointment Status Change	
Appointment Reminder		Audit Report - Appointments	26
Number of Patients <6 or 65+ Years who Received Appointment Reminders		Appointment Time Change	
Meaningful Use Measure Calculation List	156	Audit Report - Appointments	26
Appointment Status		Appointment Type Change	
Average Length of Time Between Appointment Statuses		Audit Report - Appointments	26
Appointment Statistics Report	20	Audit Log Option	
Next Appointment Status		Audit Report - Audit Log Status	28
Patient Route Slip	216	Bank Account Number Change	
Number of Appointments in Appointment Status for or Longer than Length of Time		Audit Report - Clinics	30
Appointment Statistics Report	20	Billing Type Change	
		Audit Report - Patients	34
		Change of Address	
		Coupon Book - Payment Agreements	79
		Coupon Book - Future Due Payments	78

Audit (continued)

Date of Last Case Status Update		Provider Social Security Number Change	
Practice Treatment Case Report	248	Audit Report - Providers/Staff	36
Patient Treatment Case Report	218	Record Type Change	
Deleted Appointment		Audit Report - Patients	34
Audit Report - Appointments	26	Audit Report - Transactions	38
Deleted Entry		Audit Rights Report - Assigned Individually	40
Audit Report - Patients	34	Audit Rights Report - Assigned to Groups	42
Deleted Procedure		Audit Rights Report - Group Names	44
Audit Report - Combined	32	Audit Rights Report - Users to Groups	46
Deleted Transaction		Audit Report - Combined	32
Audit Report - Transactions	38	Staff Social Security Number Change	
Encounter Number Change		Audit Report - Providers/Staff	36
Audit Report - Transactions	38	Time of Change	
Fiscal Year Month Change		Audit Report - Appointments	26
Audit Report - Clinics	30	Audit Report - Audit Log Status	28
Guarantor Name Change		Audit Report - Clinics	30
Audit Report - Patients	34	Audit Report - Combined	32
Initial Entry		Audit Report - Patients	34
Audit Report - Patients	34	Audit Report - Providers/Staff	36
Inserted Appointment		Audit Report - Transactions	38
Audit Report - Appointments	26	Audit Rights Report - Assigned Individually	40
Inserted Transaction		Audit Rights Report - Assigned to Groups	42
Audit Report - Transactions	38	Audit Rights Report - Group Names	44
Login Name Change		Audit Rights Report - Users to Groups	46
Audit Report - Providers/Staff	36	Appointment Cycle Time Report	16
Operatory Change		Transaction Amount Change	
Audit Report - Appointments	26	Audit Report - Transactions	38
Other ID Change		Transaction Description Change	
Audit Report - Patients	34	Audit Report - Transactions	38
Patient Name Change		User Changed	
Audit Report - Patients	34	Audit Rights Report - Users to Groups	46
Audit Report - Transactions	38	Audit Rights Report - Assigned Individually	40
Audit Report - Appointments	26	User Group Change	
Patient Social Security Number or Request Date Change		Audit Rights Report - Group Names	44
Audit Report - Patients	34	Average	
Patient Status Change		Amount of Debit Adjustments (Average)	
Audit Report - Patients	34	Practice Analysis Report	242
Perio Measurement Change		Amount of Finance Charges (Average)	
Perio - Exam Comparison Report	232	Practice Analysis Report	242
Perio - Combined Graphic & Data Chart Report	228	Amount of Insured Charges (Average)	
Practice Change		Practice Analysis Report	242
Audit Report - Clinics	30	Amount of Late Charges (Average)	
Practice Title Change		Practice Analysis Report	242
Audit Report - Clinics	30	Amount of Non-insured Charges (Average)	
Primary Provider ID Change		Practice Analysis Report	242
Audit Report - Patients	34	Amount of Other Debit Adjustments (Average)	
Procedure Date Change		Practice Analysis Report	242
Audit Report - Transactions	38	Average Amount of Adjustment Type	
Provider Class Change		Adjustment Summary Report	4
Audit Report - Providers/Staff	36	Average Amount of Adjustments	
Provider Fee Schedule Change		Day Sheet (Adjustments) Report	90
Audit Report - Providers/Staff	36	Average Amount of Adjustments for Clinic	
Provider ID Change		Day Sheet (Adjustments) Report	90
Audit Report - Transactions	38	Average Amount of Adjustments for Provider	
Audit Report - Providers/Staff	36	Day Sheet (Adjustments) Report	90
Provider Name Change		Average Amount of Credit Adjustments	
Audit Report - Providers/Staff	36	Day Sheet (Adjustments) Report	90
		Average Amount of Debit Adjustments	
		Day Sheet (Adjustments) Report	90
		Average Amount of Finance Charges	
		Day Sheet (Adjustments) Report	90

Average (continued)

Average Amount of Late Charges		Average Payment Amount	
Day Sheet (Adjustments) Report	90	Day Sheet (Receipts) Report	98
Average Amount of Medicaid Procedures		Average Payment Amount for Clinic	
RVU Production Summary Report	298	Day Sheet (Receipts) Report	98
Production Summary Report	260	Average Payment Amount for Initial Provider	
Average Amount of Medicaid Procedures for Clinic		Day Sheet (Receipts) Report	98
RVU Production Summary Report	298	Average Payment Amount for Payment Type	
Production Summary Report	260	Day Sheet (Receipts) Report	98
Average Amount of Medicaid Procedures for Provider		Average Payment Amount for Provider	
RVU Production Summary Report	298	Day Sheet (Receipts) Report	98
Production Summary Report	260	Average Production per Patient	
Average Amount of Non-Medicaid Procedures		Analysis Summary Report - Standard	12
RVU Production Summary Report	298	Day Sheet Report	100
Production Summary Report	260	Analysis Summary Report - Daily	8
Average Amount of Non-Medicaid Procedures for Clinic		Average Production per Patient for Clinic	
RVU Production Summary Report	298	Analysis Summary Report - Standard	12
Production Summary Report	260	Day Sheet Report	100
Average Amount of Non-Medicaid Procedures for Provider		Analysis Summary Report - Daily	8
RVU Production Summary Report	298	Average Production per Patient for Provider	
Production Summary Report	260	Analysis Summary Report - Standard	12
Average Amount of Payment Type		Day Sheet Report	100
Payment Summary Report	226	Analysis Summary Report - Daily	8
Average Amount of Payments		Average Production Per Patient from Referral Source	
Payment Summary Report	226	Referral Analysis Report	282
Average Amount of Procedures		Average Production Per Patient from Referral Sources	
RVU Production Summary Report	298	Referral Analysis Report	282
Production Summary Report	260	Average Production per Patient MTD	
Average Amount of Procedures for Clinic		Day Sheet (Charges and Receipts) Report	94
RVU Production Summary Report	298	Average Production per Patient MTD for Provider	
Production Summary Report	260	Day Sheet (Charges and Receipts) Report	94
Average Amount of Procedures for Provider		Average Wait Time	
RVU Production Summary Report	298	Appointment Cycle Time Report	16
Production Summary Report	260	Beginning Balance (Average)	
Average Charge per Patient		Practice Analysis Report	242
Analysis Summary Report - Standard	12	Current Average Charge per Patient	
Day Sheet Report	100	Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Daily	8	Current Average Charge per Patient for Provider	
Average Charge per Patient for Clinic		Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Standard	12	Current Average Production per Patient	
Day Sheet Report	100	Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Daily	8	Current Average Production per Patient for Provider	
Average Charge per Patient for Provider		Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Standard	12	Ending Balance (Average)	
Day Sheet Report	100	Practice Analysis Report	242
Analysis Summary Report - Daily	8	New Patients (Average)	
Average Charge per Patient MTD		Practice Analysis Report	242
Day Sheet (Charges and Receipts) Report	94	Referred Patients (Average)	
Average Charge per Patient MTD for Provider		Practice Analysis Report	242
Day Sheet (Charges and Receipts) Report	94	Subtotal of Charges (Average)	
Average Length of Time Between Appointment Statuses		Practice Analysis Report	242
Appointment Statistics Report	20	Total Average Charge per Patient	
Average Monthly Charge Amount		Analysis Summary Report - Standard	12
Future Due Payment Plan Report - Monthly Totals	126	Analysis Summary Report - Daily	8
Average Number of Charges		Total Average Production per Patient	
Future Due Payment Plan Report - Monthly Totals	126	Analysis Summary Report - Standard	12
		Analysis Summary Report - Daily	8
		Total Average Production per Patient at Clinics from Referral Source	
		Referral Analysis Report	282
		Total Charges (Average)	
		Practice Analysis Report	242

Balance

Account Balance		Amount of Ending Balances for Provider	
Collections Manager List	70	Analysis Summary Report - Standard	12
Family Ledger Report	118	Analysis Summary Report - Daily	8
Family Ledger Report (Single Family)	120	Amount of Other Applied Credit Initial Balances for Clinic	
Insurance Claim Aging Report	140	Day Sheet Report	100
Letter Merge Reports	152	Amount of Other Applied Credit Initial Balances for Provider	
Patient Route Slip	216	Day Sheet Report	100
Patient's Ledger Report	220	Amount of Other Credit Initial Balances for Clinic	
Payment Agreement Report	224	Analysis Summary Report - Standard	12
Pre-Treatment Estimate Aging Report	252	Analysis Summary Report - Daily	8
Aging/Credit Balance Report	6	Amount of Other Credit Initial Balances for Provider	
Account Balance Amount Aged 121 - 150		Analysis Summary Report - Standard	12
Pre-Treatment Estimate Aging Report	252	Analysis Summary Report - Daily	8
Account Balance Amount Aged 151 - 180		Balance (as of a Date)	
Pre-Treatment Estimate Aging Report	252	Day Sheet Report	100
Account Balance Amount Aged 31 - 60		Day Sheet (Charges and Receipts) Report	94
Pre-Treatment Estimate Aging Report	252	Balance (as of a Date) for Clinic	
Account Balance Amount Aged 61 - 90		Day Sheet Report	100
Pre-Treatment Estimate Aging Report	252	Balance (as of a Date) for Provider	
Account Balance Amount Aged 91 - 120		Day Sheet Report	100
Pre-Treatment Estimate Aging Report	252	Day Sheet (Charges and Receipts) Report	94
Amount of Account Balance Aged >90		Balance Due	
Insurance Claim Aging Report	140	Coupon Book - Payment Agreements	79
Amount of Account Balance Aged 1 - 30		Coupon Book - Future Due Payments	78
Insurance Claim Aging Report	140	Beginning Balance	
Amount of Account Balance Aged 31 - 60		Analysis Summary Report - Standard	12
Insurance Claim Aging Report	140	Provider A/R Totals - Daily Report	264
Amount of Account Balance Aged 61 - 90		Analysis Summary Report - Daily	8
Insurance Claim Aging Report	140	Beginning Balance (Average)	
Amount of Beginning Balances for Clinic		Practice Analysis Report	242
Analysis Summary Report - Standard	12	Beginning Balance (for Date Range)	
Analysis Summary Report - Daily	8	Practice Analysis Report	242
Amount of Beginning Balances for Provider		Beginning Balance (MTD)	
Analysis Summary Report - Standard	12	Practice Analysis Report	242
Analysis Summary Report - Daily	8	Beginning Balance (YTD)	
Amount of Credit Initial Balances		Practice Analysis Report	242
Provider A/R Totals - Daily Report	264	Beginning Balance for Provider	
Amount of Credit Initial Balances for Clinic		Provider A/R Totals - Standard Report	266
Analysis Summary Report - Standard	12	Provider A/R Totals - Daily Report	264
Day Sheet Report	100	Credit Balance (as of Date)	
Analysis Summary Report - Daily	8	Practice Analysis Report	242
Amount of Credit Initial Balances for Provider		Credit Initial Balance	
Analysis Summary Report - Standard	12	Analysis Summary Report - Standard	12
Day Sheet Report	100	Analysis Summary Report - Daily	8
Provider A/R Totals - Daily Report	264	Current Account Balance	
Provider A/R Totals - Standard Report	266	Billing Statement	48
Analysis Summary Report - Daily	8	Debit Initial Balance	
Amount of Debit Initial Balances (Production)		Analysis Summary Report - Standard	12
Provider A/R Totals - Daily Report	264	Analysis Summary Report - Daily	8
Amount of Debit Initial Balances for Clinic		Debit Initial Balance	
Analysis Summary Report - Standard	12	Analysis Summary Report - Standard	12
Day Sheet Report	100	Analysis Summary Report - Daily	8
Analysis Summary Report - Daily	8	Ending Balance	
Amount of Debit Initial Balances for Provider		Analysis Summary Report - Standard	12
Analysis Summary Report - Standard	12	Provider A/R Totals - Daily Report	264
Day Sheet Report	100	Analysis Summary Report - Daily	8
Analysis Summary Report - Daily	8	Ending Balance (Average)	
Amount of Ending Balances for Clinic		Practice Analysis Report	242
Analysis Summary Report - Standard	12	Ending Balance (for Date Range)	
Analysis Summary Report - Daily	8	Practice Analysis Report	242

Balance (continued)

Ending Balance (MTD)		Total Amount of Account Balances Aged 1 - 30 for Pre-treatment Estimates	
Practice Analysis Report	242	Pre-Treatment Estimate Aging Report	252
Ending Balance (YTD)		Total Amount of Account Balances Aged 1 - 30 for Primary Pre-treatment Estimates	
Practice Analysis Report	242	Pre-Treatment Estimate Aging Report	252
Ending Balance for Provider		Total Amount of Account Balances Aged 1 - 30 for Secondary Pre-treatment Estimates	
Provider A/R Totals - Standard Report	266	Pre-Treatment Estimate Aging Report	252
Provider A/R Totals - Daily Report	264	Total Amount of Account Balances Aged 1 - 30 with Claims	
Family Balance		Insurance Claim Aging Report	140
Treatment Case Report	314	Total Amount of Account Balances Aged 1 - 30 with Primary Claims	
Patient Treatment Case Report	218	Insurance Claim Aging Report	140
Family Member Balance (as of a Date)		Total Amount of Account Balances Aged 1 - 30 with Secondary Claims	
Patient's Ledger Report	220	Insurance Claim Aging Report	140
Ledger Balance		Total Amount of Account Balances Aged 121 - 150 for Pre-treatment Estimates	
Suspended Credits Report	312	Pre-Treatment Estimate Aging Report	252
Net Change in Balance		Total Amount of Account Balances Aged 121 - 150 for Primary Pre-treatment Estimates	
Day Sheet (Charges and Receipts) Report	94	Pre-Treatment Estimate Aging Report	252
Net Change in Balance for Provider		Total Amount of Account Balances Aged 121 - 150 for Secondary Pre-treatment Estimates	
Day Sheet (Charges and Receipts) Report	94	Pre-Treatment Estimate Aging Report	252
New Balance		Total Amount of Account Balances Aged 121 - 150 with Claims	
Walkout - Family Walkout	358	Insurance Claim Aging Report	140
Other Credit Initial Balance		Total Amount of Account Balances Aged 121 - 150 with Primary Claims	
Analysis Summary Report - Standard	12	Insurance Claim Aging Report	140
Analysis Summary Report - Daily	8	Total Amount of Account Balances Aged 151 - 180 for Pre-treatment Estimates	
Patient Balance		Pre-Treatment Estimate Aging Report	252
Patient Route Slip	216	Total Amount of Account Balances Aged 151 - 180 for Primary Pre-treatment Estimates	
Patient Treatment Case Report	218	Pre-Treatment Estimate Aging Report	252
Patient's Ledger Report	220	Total Amount of Account Balances Aged 151 - 180 with Claims	
Referred By Doctor/Other Report	288	Insurance Claim Aging Report	140
Referred By Patient Report	290	Total Amount of Account Balances Aged 151 - 180 with Secondary Claims	
Treatment Case Report	314	Insurance Claim Aging Report	140
Continuing Care Display List	76	Total Amount of Account Balances Aged 151 - 180 with Primary Claims	
Patient Running Balance		Insurance Claim Aging Report	140
Patient Ledger Report	202	Total Amount of Account Balances Aged 151 - 180 with Secondary Claims	
Payment Agreement Remaining Balance		Insurance Claim Aging Report	140
Payment Agreement Report	224	Total Amount of Account Balances Aged 181+ for Pre-treatment Estimates	
Payment Agreement Report	224	Pre-Treatment Estimate Aging Report	252
Payment Agreement Amortization Schedule	222	Total Amount of Account Balances Aged 181+ for Primary Pre-treatment Estimates	
Payment Plan Remaining Balance		Pre-Treatment Estimate Aging Report	252
Letter Merge Reports	152	Total Amount of Account Balances Aged 181+ for Secondary Pre-treatment Estimates	
Previous Balance		Pre-Treatment Estimate Aging Report	252
Day Sheet Report	100	Total Amount of Account Balances Aged 181+ for Primary Claims	
Day Sheet (Charges and Receipts) Report	94	Insurance Claim Aging Report	140
Previous Balance for Clinic		Total Amount of Account Balances Aged 181+ for Secondary Claims	
Day Sheet Report	100	Insurance Claim Aging Report	140
Previous Balance for Provider		Total Amount of Account Balances Aged 181+ for Primary Pre-treatment Estimates	
Day Sheet Report	100	Pre-Treatment Estimate Aging Report	252
Day Sheet (Charges and Receipts) Report	94	Total Amount of Account Balances Aged 181+ for Secondary Pre-treatment Estimates	
Prior Account Balance		Pre-Treatment Estimate Aging Report	252
Walkout - Family Walkout	358	Pre-Treatment Estimate Aging Report	252
Remaining Balance			
Future Due Payment Plan Report - Standard	128		
Total Account Balance			
Insurance Claim Aging Report	140		
Billing Statement	48		
Total Amount of Account Bal			
Collections Manager List	70		
Payment Agreement Report	224		
Aging/Credit Balance Report	6		

Balance (continued)

Total Amount of Account Balances Aged 181+ for Secondary Pre-treatment Estimates		Total Amount of Account Balances Aged 91 - 120 with Primary Claims	
Pre-Treatment Estimate Aging Report	252	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 181+ with Claims		Total Amount of Account Balances Aged 91 - 120 with Secondary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 181+ with Primary Claims		Total Amount of Account Balances with Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 181+ with Secondary Claims		Total Amount of Account Balances with Pre-treatment Estimates	
Insurance Claim Aging Report	140	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 31 - 60 for Pre-treatment Estimates		Total Amount of Account Balances with Primary Claims	
Pre-Treatment Estimate Aging Report	252	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 31 - 60 for Primary Pre-treatment Estimates		Total Amount of Account Balances with Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 31 - 60 for Secondary Pre-treatment Estimates		Total Amount of Account Balances with Secondary Claims	
Pre-Treatment Estimate Aging Report	252	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 31 - 60 with Claims		Total Amount of Account Balances with Secondary Pre-treatment Estimates	
Insurance Claim Aging Report	140	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 31 - 60 with Primary Claims		Total Amount of Balances Remaining for Payment Agreements	
Insurance Claim Aging Report	140	Payment Agreement Report	224
Total Amount of Account Balances Aged 31 - 60 with Secondary Claims		Total Amount of Beginning Balances	
Insurance Claim Aging Report	140	Analysis Summary Report - Standard	12
Total Amount of Account Balances Aged 61 - 90 for Pre-treatment Estimates		Provider A/R Totals - Daily Report	264
Pre-Treatment Estimate Aging Report	252	Provider A/R Totals - Standard Report	266
Total Amount of Account Balances Aged 61 - 90 for Primary Pre-treatment Estimates		Analysis Summary Report - Daily	8
Pre-Treatment Estimate Aging Report	252	Total Amount of Credit Initial Balances	
Total Amount of Account Balances Aged 61 - 90 for Secondary Pre-treatment Estimates		Analysis Summary Report - Standard	12
Pre-Treatment Estimate Aging Report	252	Day Sheet Report	100
Total Amount of Account Balances Aged 61 - 90 with Claims		Provider A/R Totals - Daily Report	264
Insurance Claim Aging Report	140	Provider A/R Totals - Standard Report	266
Total Amount of Account Balances Aged 61 - 90 with Primary Claims		Analysis Summary Report - Daily	8
Insurance Claim Aging Report	140	Total Amount of Debit Initial Balances	
Total Amount of Account Balances Aged 61 - 90 with Secondary Claims		Analysis Summary Report - Standard	12
Insurance Claim Aging Report	140	Day Sheet Report	100
Total Amount of Account Balances Aged 91 - 120 for Pre-treatment Estimates		Analysis Summary Report - Daily	8
Pre-Treatment Estimate Aging Report	252	Total Amount of Debit Initial Balances (Production)	
Total Amount of Account Balances Aged 91 - 120 for Primary Pre-treatment Estimates		Provider A/R Totals - Standard Report	266
Pre-Treatment Estimate Aging Report	252	Provider A/R Totals - Daily Report	264
Total Amount of Account Balances Aged 91 - 120 for Secondary Pre-treatment Estimates		Total Amount of Ending Balances	
Pre-Treatment Estimate Aging Report	252	Analysis Summary Report - Standard	12
Total Amount of Account Balances Aged 91 - 120 with Claims		Provider A/R Totals - Daily Report	264
Insurance Claim Aging Report	140	Provider A/R Totals - Standard Report	266
		Analysis Summary Report - Daily	8
		Total Amount of Other Applied Credit Initial Balances	
		Day Sheet Report	100
		Total Amount of Other Credit Initial Balances	
		Analysis Summary Report - Standard	12
		Analysis Summary Report - Daily	8
		Total Family Balance (as of a Date)	
		Family Ledger Report (Single Family)	120
		Family Ledger Report	118
		Total Family Balance as of a Date	
		Patient's Ledger Report	220
		Total Patient Balance (as of Date)	
		Patient Ledger Report	202
		Total Patient Balance as of a Date	
		Patient's Ledger Report	220

Bank Account

Bank Account Number	
Deposit Slip	108
Audit Report - Clinics	30
Bank Account Number Change	
Audit Report - Clinics	30

Basic

Insurance Coverage Percent (Basic) for Primary Insurance	
Patient Route Slip	216
Insurance Coverage Percent (Basic) for Secondary Insurance	
Patient Route Slip	216

Beginning

Beginning ADA Code	
Insurance Coverage Tables Report	144

Beginning Balance

Amount of Beginning Balances for Clinic	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Amount of Beginning Balances for Provider	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Beginning Balance	
Analysis Summary Report - Standard	12
Provider A/R Totals - Daily Report	264
Analysis Summary Report - Daily	8
Beginning Balance (Average)	
Practice Analysis Report	242
Beginning Balance (for Date Range)	
Practice Analysis Report	242
Beginning Balance (MTD)	
Practice Analysis Report	242
Beginning Balance (YTD)	
Practice Analysis Report	242
Beginning Balance for Provider	
Provider A/R Totals - Standard Report	266
Provider A/R Totals - Daily Report	264
Total Amount of Beginning Balances	
Analysis Summary Report - Standard	12
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Analysis Summary Report - Daily	8

Beneficiary

Beneficiary ID	
Dental Encounters Report	106

Benefits

Amount of Annual Primary Insurance Plan Benefits for Family	
Treatment Case Report	314
Amount of Annual Primary Insurance Plan Benefits for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Annual Secondary Insurance Plan Benefits for Family	
Treatment Case Report	314
Amount of Annual Secondary Insurance Plan Benefits for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218

Amount of Estimated Primary Insurance Benefits Remaining YTD for Family	
Treatment Case Report	314
Amount of Estimated Primary Insurance Benefits Remaining YTD for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Estimated Secondary Insurance Benefits Remaining YTD for Family	
Treatment Case Report	314
Amount of Estimated Secondary Insurance Benefits Remaining YTD for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Primary Insurance Benefits Remaining	
Unscheduled Treatment Plans (Detailed) Report	350
Patient Route Slip	216
Amount of Primary Insurance Benefits Used	
Patient Route Slip	216
Amount of Primary Insurance Paid Benefits YTD for Family	
Treatment Case Report	314
Amount of Primary Insurance Paid Benefits YTD for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Remaining Benefits for Primary Insurance	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Amount of Remaining Benefits for Secondary Insurance	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Amount of Secondary Insurance Benefits Remaining	
Unscheduled Treatment Plans (Detailed) Report	350
Patient Route Slip	216
Amount of Secondary Insurance Benefits Used	
Patient Route Slip	216
Amount of Secondary Paid Benefits for Family	
Treatment Case Report	314
Amount of Secondary Paid Benefits for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Benefit Renewal Month	
Insurance Carrier List	132
Benefits Remaining	
Insurance Carrier List	132
Family Benefits	
Insurance Carrier List	132
Individual Benefits	
Insurance Carrier List	132
Maximum Primary Insurance Benefit Amount	
Patient Route Slip	216
Maximum Secondary Insurance Benefit Amount	
Patient Route Slip	216
Primary Insurance Benefits Expiration Date for Family	
Treatment Case Report	314
Primary Insurance Benefits Expiration Date for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218

Benefits (continued)

Primary Insurance Benefits Remaining		Analysis Summary Report - Daily	8
Letter Merge Reports	152	Total Amount of Charges Billed to Insurance for Previous Month	
Primary Insurance Benefits Renewal Month		Day Sheet (Charges and Receipts) Report	94
Patient Route Slip	216	Total Amount of Current Charges Billed to Insurance	
Projected Amount of Remaining Benefits		Day Sheet (Charges and Receipts) Report	94
Treatment Plan Approval Status Report	318	Total Amount of MTD Charges Billed to Insurance	
Treatment Plan Approval Report	316	Day Sheet (Charges and Receipts) Report	94
Projected Amount of Remaining Benefits for Secondary Insurance		Total Amount of YTD Charges Billed to Insurance	
Treatment Plan Approval Status Report	318	Day Sheet (Charges and Receipts) Report	94
Treatment Plan Approval Report	316	Billing Type	
Secondary Insurance Benefits Expiration Date for Family		Billing Type	
Treatment Case Report	314	Audit Report - Patients	34
Secondary Insurance Benefits Expiration Date for Patient		Collections Manager List	70
Treatment Case Report	314	Credit Card Transaction Report	80
Patient Treatment Case Report	218	Day Sheet (Adjustments) Report	90
Secondary Insurance Benefits Remaining		Day Sheet (Charges and Receipts) Report	94
Letter Merge Reports	152	Day Sheet (Receipts) Report	98
Secondary Insurance Benefits Renewal Month		Day Sheet Report	100
Patient Route Slip	216	Deposit Slip	108
Billed		Family Ledger Report	118
Amount of Current Charges Billed to Insurance for Provider		Family Ledger Report (Single Family)	120
Day Sheet (Charges and Receipts) Report	94	Finance Charge Report	124
Billing		Future Due Payment Plan Report - Standard	128
Amount Billed to Insurance		Late Charge Report	150
Analysis Summary Report - Standard	12	Letter Merge Reports	152
Collections Manager List	70	Operator Day Sheet Report	188
Analysis Summary Report - Daily	8	Patient Ledger Report	202
Amount Billed to Insurance for Clinic		Patient List	204
Analysis Summary Report - Standard	12	Patient's Ledger Report	220
Day Sheet Report	100	Payment Agreement Report	224
Analysis Summary Report - Daily	8	Practice Treatment Case Report	248
Amount Billed to Insurance for Provider		Procedures Not Attached to Insurance Report	258
Analysis Summary Report - Standard	12	Production Summary Report	260
Day Sheet Report	100	Provider Revenue - Allocations Report	274
Analysis Summary Report - Daily	8	Provider Revenue - Charges Report	276
Amount of Charges Billed to Insurance for Previous Month for Provider		Provider Revenue - Credits Report	278
Day Sheet (Charges and Receipts) Report	94	RVU Day Sheet Report	296
Amount of MTD Charges Billed to Insurance for Provider		RVU Production Summary Report	298
Day Sheet (Charges and Receipts) Report	94	Suspended Credits Report	312
Amount of YTD Charges Billed to Insurance for Provider		UDS - Tobacco Use and Intervention Report	342
Day Sheet (Charges and Receipts) Report	94	Aging/Credit Balance Report	6
Bill Date		Billing Type Change	
Walkout - Family Walkout	358	Audit Report - Patients	34
Billable to Insurance		Billing Types	
Procedure Code List	256	Custom Practice Information Report	82
Billing Date		Guarantor Billing Type	
Billing Statement	48	Patient Route Slip	216
Do not Bill to Dental Insurance		Birth Date	
Insurance Carrier List	132	Birth Date	
Do not Bill to Dental Insurance if 0% Coverage		Insurance Claim Aging Report	140
Insurance Carrier List	132	Insurance Eligibility Report	146
Total Amount Billed to Insurance		Insurance Transaction Analysis Report	148
Analysis Summary Report - Standard	12	Letter Merge Reports	152
Collections Manager List	70	Birthday List	50
Day Sheet Report	100	Guarantor Birth Date & Age	
		Collections Manager List	70
		Number of Patients without a Birth Date Entered	
		Practice Statistics Report	246
		Patient Birth Date	
		Employers and Employed Patients Report	116
		Insurance Carrier List	132

Birth Date (continued)

Patient Chart and Progress Notes Printout	194
Patient Chart Printout	196
Patient List	204
Patient List (Filtered)	206
Patient Proposed Treatment Case Report (Your Care Plan)	212
Patient Questionnaire	214
Patient Route Slip	216
Patient Treatment Case Report	218
Perio - Combined Graphic & Data Chart Report	228
Perio - Exam Comparison Report	232
Perio - Graphic Chart Report	234
Practice Treatment Case Report	248
Prescription Printout	250
Pre-Treatment Estimate Aging Report	252
RVU Utilization Report	304
Treatment Case Report	314
Treatment Plan Approval Report	316
Treatment Plan Approval Status Report	318
UDS - Age/Gender Report	322
UDS - Insurance Financial Class Report	330
UDS - Insurance Financial Class Report (2013)	332
UDS - Medicaid/Medicare Report	334
UDS - Patient Status Report	338
UDS - Sealant Statistics Report	340
UDS - Tobacco Use and Intervention Report	342
Utilization Report	354
Walkout - Doctor's Statement	356
Clinical Notes Report	64
Percent of Patients without a Birth Date Entered	
Practice Statistics Report	246
Spouse Birth Date	
Patient Questionnaire	214
Subscriber Birth Date	
Walkout - Doctor's Statement	356
Insurance Carrier List	132
Subscriber Birth Date for Primary Insurance	
Patient Questionnaire	214
Subscriber Birth Date for Secondary Insurance	
Patient Questionnaire	214
Bleeding	
Bleeding	
Perio - Data Chart Report	230
Perio - Combined Graphic & Data Chart Report	228
Blood Pressure	
Blood Pressure	
Patient Health Assessment Report	198
Number of Patients 18 - 85 Years with Abnormal Blood Pressure Reading	
Clinical Quality Measures List	66
Blue Cross/Blue Shield	
Blue Cross/Blue Shield ID	
Provider IDs List	272
Blue Cross/Blue Shield Number	
Practice Organization List	244

BMI

Number of Patients 18 - 64 Years with Abnormal BMI Reading and Follow Up	
Clinical Quality Measures List	66
Number of Patients 3 - 17 Years with BMI Percentile Reading	
Clinical Quality Measures List	66
Number of Patients 65+ Years with Abnormal BMI Reading and Follow Up	
Clinical Quality Measures List	66

BMI Percentile

Number of Patients 3 - 17 Years with BMI Percentile Reading	
Clinical Quality Measures List	66

Body Mass Index

Body Mass Index	
Patient Health Assessment Report	198
Number of Patients 3 - 17 Years with BMI Percentile Reading	
Clinical Quality Measures List	66
Number of Patients 65+ Years with Abnormal BMI Reading and Follow Up	
Clinical Quality Measures List	66

Bone Loss

Bone Loss	
Perio - Data Chart Report	230
Perio - Combined Graphic & Data Chart Report	228

Break Appointment Reason

Reason Appointment Broken	
Unscheduled Appointment List (DX1)	344

Broken

Percent Broken Appointments	
Appointment Statistics Report	20

Broken Appointment

Date Appointment Broken	
Unscheduled Appointment List (OM)	346
Unscheduled Appointment List (DX1)	344
Number of Broken Appointments	
Appointment Statistics Report	20

Calculation

Co-pay Calculation for Insurance Portion	
Insurance Coverage Tables Report	144
Co-pay Used in Calculations	
Insurance Coverage Tables Report	144

Call

Best Time to Call	
Collections Manager List	70
Best Time to Call Patient	
Patient Questionnaire	214
Best Time to Call Spouse	
Patient Questionnaire	214

Cardholder

Cardholder Name	
Credit Card Transaction Report	80

Caries

Percent of Caries Free Patients	
Caries Prevalence and Periodontal Index Report	52

Caries (continued)

Percent of Patients with Caries History	
Caries Prevalence and Periodontal Index Report	52
Caries Risk	
Number of Patients with Moderate to High Risk of Caries	
UDS - Sealant Statistics Report	340
Number of Patients with Moderate to High Risk of Caries for Provider	
UDS - Sealant Statistics Report	340
Number of Patients with Moderate to High Risk of Caries in Clinic	
UDS - Sealant Statistics Report	340
Number of Patients with Moderate to High Risk of Caries in ZIP Code	
UDS - Sealant Statistics Report	340
Number of Patients with Moderate to High Risk of Caries who Got Sealants on Permanent First Molars	
UDS - Sealant Statistics Report	340
Number of Patients with Moderate to High Risk of Caries who Got Sealants on Permanent First Molars for Provider	
UDS - Sealant Statistics Report	340
Number of Patients with Moderate to High Risk of Caries who Got Sealants on Permanent First Molars in Clinic	
UDS - Sealant Statistics Report	340
Number of Patients with Moderate to High Risk of Caries who Got Sealants on Permanent First Molars in ZIP Code	
UDS - Sealant Statistics Report	340

Case

Alternate Case Name	
Practice Treatment Case Report	248
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Office Portion for Case	
Patient Treatment Case Report	218
Amount of Patient Portion for Case	
Practice Treatment Case Report	248
Patient Treatment Case Report	218
Amount of Primary Insurance Portion for Case	
Practice Treatment Case Report	248
Patient Treatment Case Report	218
Amount of Secondary Insurance Portion for Case	
Practice Treatment Case Report	248
Patient Treatment Case Report	218
Case Amount	
Patient Proposed Treatment Case Report (Your Care Plan)	212
Case Comments	
Practice Treatment Case Report	248
Patient Treatment Case Report	218
Case Expiration Date	
Practice Treatment Case Report	248
Case Finance Status	
Practice Treatment Case Report	248
Treatment Case Report	314
Patient Treatment Case Report	218

Case Name	
Patient Treatment Case Report	218
Practice Treatment Case Report	248
Patient Proposed Treatment Case Report (Your Care Plan)	212
Case Notes	
Treatment Case Report	314
Patient Treatment Case Report	218
Case Priority	
Patient Treatment Case Report	218
Case Severity	
Practice Treatment Case Report	248
Case Status	
Practice Treatment Case Report	248
Patient Treatment Case Report	218
Date of Last Case Status Update	
Practice Treatment Case Report	248
Patient Treatment Case Report	218
Fee for Case	
Practice Treatment Case Report	248
Patient Treatment Case Report	218
Lab Case Note	
Patient Notes Report	208
Percent of Accepted Cases	
Practice Treatment Case Report	248
Percent of Completed Cases	
Practice Treatment Case Report	248
Percent of Pre-authorized Cases	
Practice Treatment Case Report	248
Percent of Referred Cases	
Practice Treatment Case Report	248
Percent of Scheduled Cases	
Practice Treatment Case Report	248
Total Amount of Patient Portion for Case	
Treatment Case Report	314
Total Amount of Primary Insurance Portion for Case	
Treatment Case Report	314
Total Amount of Secondary Insurance Portion for Case	
Treatment Case Report	314
Total Case Amount	
Patient Proposed Treatment Case Report (Your Care Plan)	212
Total Fee for Case	
Treatment Case Report	314
Total Fee from Alternate Fee Schedule for Case	
Treatment Case Report	314
Total Number of Cases	
Practice Treatment Case Report	248
Case Status	
Case Status	
Practice Treatment Case Report	248
Patient Treatment Case Report	218
Date of Last Case Status Update	
Practice Treatment Case Report	248
Patient Treatment Case Report	218
Cash	
Total Amount of Cash Payments	
Operator Day Sheet Report	188
Cavities	
Number of Patients 0 - 19 Years with Tooth Decay or Cavities	
Clinical Quality Measures List	66

Change

Appointment Amount Change		Login Name Change	
Audit Report - Appointments	26	Audit Report - Providers/Staff	36
Appointment Date Change		Operatory Change	
Audit Report - Appointments	26	Audit Report - Appointments	26
Appointment Length Change		Other ID Change	
Audit Report - Appointments	26	Audit Report - Patients	34
Appointment Production Type Change		Patient Name Change	
Audit Report - Appointments	26	Audit Report - Patients	34
Appointment Provider Change		Audit Report - Transactions	38
Audit Report - Appointments	26	Audit Report - Appointments	26
Appointment Status Change		Patient Social Security Number or Request Date Change	
Audit Report - Appointments	26	Audit Report - Patients	34
Appointment Time Change		Patient Status Change	
Audit Report - Appointments	26	Audit Report - Patients	34
Appointment Type Change		Perio Measurement Change	
Audit Report - Appointments	26	Perio - Exam Comparison Report	232
Bank Account Number Change		Perio - Combined Graphic & Data Chart Report	228
Audit Report - Clinics	30	Practice Change	
Billing Type Change		Audit Report - Clinics	30
Audit Report - Patients	34	Practice Title Change	
Change of Address		Audit Report - Clinics	30
Coupon Book - Payment Agreements	79	Primary Provider ID Change	
Coupon Book - Future Due Payments	78	Audit Report - Patients	34
Check Number Change		Procedure Date Change	
Audit Report - Transactions	38	Audit Report - Transactions	38
Clinic Change		Provider Class Change	
Audit Report - Patients	34	Audit Report - Providers/Staff	36
Audit Report - Providers/Staff	36	Provider Fee Schedule Change	
Audit Report - Clinics	30	Audit Report - Providers/Staff	36
Clinic Number Change		Provider ID Change	
Audit Report - Transactions	38	Audit Report - Transactions	38
Date of Change		Audit Report - Providers/Staff	36
Audit Report - Audit Log Status	28	Provider Name Change	
Audit Report - Clinics	30	Audit Report - Providers/Staff	36
Audit Report - Combined	32	Provider Social Security Number Change	
Audit Report - Patients	34	Audit Report - Providers/Staff	36
Audit Report - Providers/Staff	36	Record Type Change	
Audit Report - Transactions	38	Audit Report - Patients	34
Audit Rights Report - Assigned Individually	40	Audit Report - Transactions	38
Audit Rights Report - Assigned to Groups	42	Audit Rights Report - Assigned Individually	40
Audit Rights Report - Group Names	44	Audit Rights Report - Assigned to Groups	42
Audit Rights Report - Users to Groups	46	Audit Rights Report - Group Names	44
Audit Report - Appointments	26	Audit Rights Report - Users to Groups	46
Date of Last Case Status Update		Audit Report - Combined	32
Practice Treatment Case Report	248	Staff Social Security Number Change	
Patient Treatment Case Report	218	Audit Report - Providers/Staff	36
Deleted Appointment		Time of Change	
Audit Report - Appointments	26	Audit Report - Appointments	26
Deleted Entry		Audit Report - Audit Log Status	28
Audit Report - Patients	34	Audit Report - Clinics	30
Deleted Procedure		Audit Report - Combined	32
Audit Report - Combined	32	Audit Report - Patients	34
Deleted Transaction		Audit Report - Providers/Staff	36
Audit Report - Transactions	38	Audit Report - Transactions	38
Encounter Number Change		Audit Rights Report - Assigned Individually	40
Audit Report - Transactions	38	Audit Rights Report - Assigned to Groups	42
Fiscal Year Month Change		Audit Rights Report - Group Names	44
Audit Report - Clinics	30	Audit Rights Report - Users to Groups	46
Guarantor Name Change		Appointment Cycle Time Report	16
Audit Report - Patients	34		

Change (continued)

Transaction Amount Change		Amount of Finance Charges (for Date Range)	
Audit Report - Transactions	38	Practice Analysis Report	242
Transaction Description Change		Amount of Finance Charges (MTD)	
Audit Report - Transactions	38	Practice Analysis Report	242
User Changed		Amount of Finance Charges (YTD)	
Audit Rights Report - Users to Groups	46	Practice Analysis Report	242
Audit Rights Report - Assigned Individually	40	Amount of Finance Charges for Clinic	
User Group Change		Analysis Summary Report - Standard	12
Audit Rights Report - Group Names	44	Day Sheet Report	100
Charge		Finance Charge Report	124
Amount of Charge Adjustments for Clinic		Analysis Summary Report - Daily	8
Analysis Summary Report - Standard	12	Amount of Finance Charges for Previous Month for Provider	
Day Sheet Report	100	Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Daily	8	Amount of Finance Charges for Provider	
Amount of Charge Adjustments for Previous Month for Provider		Analysis Summary Report - Standard	12
Day Sheet (Charges and Receipts) Report	94	Day Sheet Report	100
Day Sheet (Charges and Receipts) Report	94	Finance Charge Report	124
Amount of Charge Adjustments for Provider		Provider A/R Totals - Daily Report	264
Analysis Summary Report - Standard	12	Provider A/R Totals - Standard Report	266
Day Sheet Report	100	Analysis Summary Report - Daily	8
Analysis Summary Report - Daily	8	Amount of Finance Charges YTD	
Amount of Charges		Walkout - Family Walkout	358
Future Due Payment Plan Report - Monthly Totals	126	Amount of Insured Charges (Average)	
Provider A/R Totals - Daily Report	264	Practice Analysis Report	242
Daily Summary Report	88	Amount of Insured Charges (for Date Range)	
Amount of Charges Billed to Insurance for Previous Month for Provider		Practice Analysis Report	242
Day Sheet (Charges and Receipts) Report	94	Amount of Insured Charges (MTD)	
Amount of Charges for Clinic		Practice Analysis Report	242
Day Sheet Report	100	Amount of Insured Charges (YTD)	
Amount of Charges for Patient		Practice Analysis Report	242
UDS - Patient Related Revenue Report	336	Amount of Late Charges	
Amount of Charges for Previous Month for Provider		Provider A/R Totals - Daily Report	264
Day Sheet (Charges and Receipts) Report	94	Amount of Late Charges (Average)	
Amount of Charges for Provider		Practice Analysis Report	242
Provider A/R Totals - Daily Report	264	Amount of Late Charges (for Date Range)	
Provider A/R Totals - Standard Report	266	Practice Analysis Report	242
Day Sheet Report	100	Amount of Late Charges (MTD)	
Amount of Current Charge Adjustments for Provider		Practice Analysis Report	242
Day Sheet (Charges and Receipts) Report	94	Amount of Late Charges (YTD)	
Day Sheet (Charges and Receipts) Report	94	Practice Analysis Report	242
Amount of Current Charges		Amount of Late Charges for Clinic	
Walkout - Family Walkout	358	Analysis Summary Report - Standard	12
Amount of Current Charges Billed to Insurance for Provider		Day Sheet Report	100
Day Sheet (Charges and Receipts) Report	94	Late Charge Report	150
Amount of Current Charges Compared to Fee Schedule for Provider		Analysis Summary Report - Daily	8
Day Sheet (Charges and Receipts) Report	94	Amount of Late Charges for Previous Month for Provider	
Amount of Current Finance Charges for Provider		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Amount of Late Charges for Provider	
Amount of Current Late Charges for Provider		Analysis Summary Report - Standard	12
Day Sheet (Charges and Receipts) Report	94	Day Sheet Report	100
Amount of Finance Charges		Late Charge Report	150
Provider A/R Totals - Daily Report	264	Provider A/R Totals - Daily Report	264
Amount of Finance Charges (Average)		Provider A/R Totals - Standard Report	266
Practice Analysis Report	242	Analysis Summary Report - Daily	8
		Amount of Late Charges YTD	
		Walkout - Family Walkout	358
		Amount of MTD Charges Billed to Insurance for Provider	
		Day Sheet (Charges and Receipts) Report	94

Charge (continued)

Amount of MTD Charges for Provider		Operator Day Sheet Report	188
Day Sheet (Charges and Receipts) Report	94	Patient Ledger Report	202
Amount of MTD Finance Charges for Provider		Patient's Ledger Report	220
Day Sheet (Charges and Receipts) Report	94	Walkout - Doctor's Statement	356
Amount of MTD Late Charges for Provider		Walkout - Family Walkout	358
Day Sheet (Charges and Receipts) Report	94	Analysis Summary Report - Daily	8
Amount of Non-insured Charges (Average)		Charges for Clinic	
Practice Analysis Report	242	Analysis Summary Report - Standard	12
Amount of Non-insured Charges (for Date Range)		Analysis Summary Report - Daily	8
Practice Analysis Report	242	Charges for Provider	
Amount of Non-insured Charges (MTD)		Analysis Summary Report - Standard	12
Practice Analysis Report	242	Analysis Summary Report - Daily	8
Amount of Non-insured Charges (YTD)		Current Average Charge per Patient	
Practice Analysis Report	242	Day Sheet (Charges and Receipts) Report	94
Amount of YTD Charge Adjustments for Provider		Current Average Charge per Patient for Provider	
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Current Charges for Provider	
Amount of YTD Charges Billed to Insurance for Provider		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Finance Charge Amount	
Amount of YTD Charges for Provider		Analysis Summary Report - Daily	8
Day Sheet (Charges and Receipts) Report	94	Analysis Summary Report - Standard	12
Amount of YTD Finance Charges for Provider		Finance Charge Report	124
Day Sheet (Charges and Receipts) Report	94	Adjustment Summary Report	4
Amount of YTD Late Charges for Provider		Finance Charge Date	
Day Sheet (Charges and Receipts) Report	94	Finance Charge Report	124
Amount of YTD Late Charges for Provider		Finance Charge Percent	
Day Sheet (Charges and Receipts) Report	94	Payment Agreement Report	224
Average Amount of Finance Charges		Grand Total Amount of Charge Adjustments	
Day Sheet (Adjustments) Report	90	Insurance Transaction Analysis Report	148
Average Amount of Late Charges		Grand Total Amount of Insured Charges	
Day Sheet (Adjustments) Report	90	Insurance Transaction Analysis Report	148
Average Charge per Patient		Grand Total Number of Charge Adjustments	
Analysis Summary Report - Standard	12	Insurance Transaction Analysis Report	148
Day Sheet Report	100	Grand Total Number of Insured Charges	
Analysis Summary Report - Daily	8	Insurance Transaction Analysis Report	148
Average Charge per Patient for Clinic		Last Late Charge Amount	
Analysis Summary Report - Standard	12	Payment Agreement Report	224
Day Sheet Report	100	Last Late Charge Date	
Analysis Summary Report - Daily	8	Payment Agreement Report	224
Average Charge per Patient for Provider		Late Charge Amount	
Analysis Summary Report - Standard	12	Analysis Summary Report - Daily	8
Day Sheet Report	100	Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8	Late Charge Report	150
Average Charge per Patient MTD		Adjustment Summary Report	4
Day Sheet (Charges and Receipts) Report	94	Late Charge Date	
Average Charge per Patient MTD for Provider		Late Charge Report	150
Day Sheet (Charges and Receipts) Report	94	Late Charge Percent or Amount	
Average Monthly Charge Amount		Truth in Lending Disclosure Statement	320
Future Due Payment Plan Report - Monthly Totals	126	Monthly Charge Amount	
Average Number of Charges		Future Due Payment Plan Report - Standard	128
Future Due Payment Plan Report - Monthly Totals	126	Net Difference of Current Charges and Fee Schedule for Provider	
Charge		Day Sheet (Charges and Receipts) Report	94
Billing Statement	48	Net Difference of Total Current Charges and Fee Schedule	
Charge Amount		Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Standard	12	Next Charge Amount (after 18 Months from Current Month)	
Day Sheet (Charges and Receipts) Report	94	Future Due Payment Plan Report - Monthly Totals	126
Day Sheet Report	100		
Family Ledger Report	118		
Family Ledger Report (Single Family)	120		
Insurance Transaction Analysis Report	148		

Charge (continued)

Number of Charges		Total Amount of Current Finance Charges	
Future Due Payment Plan Report - Monthly Totals		Day Sheet (Charges and Receipts) Report	94
126		Total Amount of Current Late Charges	
Subtotal of Charges (Average)		Day Sheet (Charges and Receipts) Report	94
Practice Analysis Report	242	Total Amount of Finance Charges	
Subtotal of Charges (for Date Range)		Analysis Summary Report - Daily	8
Practice Analysis Report	242	Analysis Summary Report - Standard	12
Subtotal of Charges (MTD)		Day Sheet (Adjustments) Report	90
Practice Analysis Report	242	Day Sheet Report	100
Subtotal of Charges (YTD)		Finance Charge Report	124
Practice Analysis Report	242	Operator Day Sheet Report	188
Subtotal of Charges for Financial Class Type		Provider A/R Totals - Daily Report	264
UDS - Patient Related Revenue Report	336	Provider A/R Totals - Standard Report	266
Subtotal of Charges for Payer Category		Truth in Lending Disclosure Statement	320
UDS - Patient Related Revenue Report	336	Adjustment Summary Report	4
Total Amount of Charge Adjustments		Total Amount of Finance Charges for Previous Month	
Analysis Summary Report - Standard	12	Day Sheet (Charges and Receipts) Report	94
Day Sheet Report	100	Total Amount of Insured Charges	
Insurance Transaction Analysis Report	148	Insurance Transaction Analysis Report	148
Operator Day Sheet Report	188	Total Amount of Late Charges	
Analysis Summary Report - Daily	8	Analysis Summary Report - Daily	8
Total Amount of Charge Adjustments for Previous Month		Analysis Summary Report - Standard	12
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Adjustments) Report	90
Day Sheet (Charges and Receipts) Report	94	Day Sheet Report	100
Total Amount of Charges		Late Charge Report	150
Day Sheet Report	100	Provider A/R Totals - Daily Report	264
Future Due Payment Plan Report - Monthly Totals		Provider A/R Totals - Standard Report	266
126		Adjustment Summary Report	4
Operator Day Sheet Report	188	Total Amount of Late Charges for Previous Month	
Provider A/R Totals - Daily Report	264	Day Sheet (Charges and Receipts) Report	94
Provider A/R Totals - Standard Report	266	Total Amount of MTD Charge Adjustments	
Analysis Summary Report - Daily	8	Day Sheet (Charges and Receipts) Report	94
Total Amount of Charges Billed to Insurance for Previous Month		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Total Amount of MTD Charges	
Total Amount of Charges for Financial Class Type		Day Sheet (Charges and Receipts) Report	94
UDS - Patient Related Revenue Report	336	Total Amount of MTD Charges Billed to Insurance	
Total Amount of Charges for Patient		Day Sheet (Charges and Receipts) Report	94
UDS - Patient Related Revenue Report	336	Total Amount of MTD Finance Charges	
Total Amount of Charges for Payer Category		Day Sheet (Charges and Receipts) Report	94
UDS - Patient Related Revenue Report	336	Total Amount of MTD Late Charges	
Total Amount of Charges for Previous Month		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Total Amount of YTD Charge Adjustments	
Total Amount of Charges for Today's Completed Work		Day Sheet (Charges and Receipts) Report	94
Patient Chart Printout	196	Day Sheet (Charges and Receipts) Report	94
Total Amount of Charges Remaining (after 18 Mos from Curr Mo)		Total Amount of YTD Charges	
Future Due Payment Plan Report - Monthly Totals		Day Sheet (Charges and Receipts) Report	94
126		Total Amount of YTD Charges Billed to Insurance	
Total Amount of Current Charge Adjustments		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Total Amount of YTD Finance Charges	
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Charges		Total Amount of YTD Finance Charges for Family	
Day Sheet (Charges and Receipts) Report	94	Family Ledger Report (Single Family)	120
Total Amount of Current Charges Billed to Insurance		Total Amount of YTD Late Charges	
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Charges Compared to Fee Schedule		Total Amount of YTD Late Charges for Family	
Day Sheet (Charges and Receipts) Report	94	Family Ledger Report (Single Family)	120
		Family Ledger Report	118
		Total Average Charge per Patient	
		Analysis Summary Report - Standard	12
		Analysis Summary Report - Daily	8
		Total Charge for Date of Service	
		Letter Merge Reports	152

Charge (continued)

Total Charges	
Analysis Summary Report - Standard	12
Total Charges (Average)	
Practice Analysis Report	242
Total Charges (for Date Range)	
Practice Analysis Report	242
Total Charges (MTD)	
Practice Analysis Report	242
Total Charges (YTD)	
Practice Analysis Report	242
Total Medicaid Charge	
Operator Day Sheet Report	188
Total Monthly Charges	
Future Due Payment Plan Report - Standard	128
Total Number of Charge Adjustments	
Insurance Transaction Analysis Report	148
Total Number of Charges	
Future Due Payment Plan Report - Monthly Totals	126
Total Number of Charges Remaining (after 18 Mos from Curr Mo)	
Future Due Payment Plan Report - Monthly Totals	126
Total Number of Insured Charges	
Insurance Transaction Analysis Report	148
Total Quantity of Finance Charges	
Day Sheet (Adjustments) Report	90
Total Quantity of Late Charges	
Day Sheet (Adjustments) Report	90
Total YTD Finance Charges for Family	
Family Ledger Report	118

Charge Adjustment

Amount of MTD Charge Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94
Charge Adjustment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Grand Total Amount of Charge Adjustments	
Insurance Transaction Analysis Report	148
Grand Total Number of Charge Adjustments	
Insurance Transaction Analysis Report	148
Total Amount of Charge Adjustments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Insurance Transaction Analysis Report	148
Operator Day Sheet Report	188
Analysis Summary Report - Daily	8
Total Amount of Charge Adjustments for Previous Month	
Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Charge Adjustments	
Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94
Total Amount of MTD Charge Adjustments	
Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94

Total Amount of YTD Charge Adjustments	
Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94
Total Number of Charge Adjustments	
Insurance Transaction Analysis Report	148

Chart

Clinical Attachment Level Graphic Chart	
Perio - Exam Comparison Report	232
Dental Chart	
Patient Chart Printout	196
Patient Chart and Progress Notes Printout	194
Gingival Margin Graphic Chart	
Perio - Exam Comparison Report	232
Graphical Chart	
Treatment Case Report	314
Paint Type	
Procedure Code List	256
Dental Diagnostic Code List	104
Perio Exam Comparison Data Chart	
Perio - Combined Graphic & Data Chart Report	228
Perio Exam Comparison Graphic Chart	
Perio - Combined Graphic & Data Chart Report	228
Perio Exam Graphic Chart	
Perio - Combined Graphic & Data Chart Report	228
Perio Graphic Chart	
Perio - Graphic Chart Report	234

Chart Number

Chart Number	
Appointment Cycle Time Report	16
Patient's Ledger Report	220
Appointment Book View Printout	14
Guarantor Chart Number	
Collections Manager List	70
Family Ledger Report	118
Family Ledger Report (Single Family)	120
Payment Agreement Amortization Schedule	222
Truth in Lending Disclosure Statement	320
Walkout - Family Walkout	358
Billing Statement	48
Patient Chart Number	
Clinical Notes Report	64
Coupon Book - Future Due Payments	78
Coupon Book - Payment Agreements	79
Day Sheet (Adjustments) Report	90
Day Sheet (Receipts) Report	98
Employers and Employed Patients Report	116
Insurance Carrier List	132
Insurance Eligibility Report	146
Letter Merge Reports	152
Operator Day Sheet Report	188
Patient Chart and Progress Notes Printout	194
Patient Chart Printout	196
Patient Information Accessed Report	200
Patient Ledger Report	202
Patient List	204
Patient List (Filtered)	206
Patient Notes Report	208
Patient Proposed Treatment Case Report (Your Care Plan)	212

Chart Number (continued)

Patient Route Slip	216
Patient Treatment Case Report	218
Perio - Exam Comparison Report	232
Perio - Graphic Chart Report	234
Practice Treatment Case Report	248
RVU Day Sheet Report	296
Treatment Case Report	314
Treatment Plan Approval Report	316
Treatment Plan Approval Status Report	318
UDS - Age/Gender Report	322
UDS - Insurance Financial Class Report	330
UDS - Insurance Financial Class Report (2013)	332
UDS - Medicaid/Medicare Report	334
UDS - Patient Status Report	338
UDS - Sealant Statistics Report	340
UDS - Tobacco Use and Intervention Report	342
Walkout - Doctor's Statement	356
Audit Report - Combined	32
Subscriber Chart Number	
Insurance Carrier List	132
Check	
Total Amount of Check Payments	
Operator Day Sheet Report	188
Check Number	
Check Number	
Coupon Book - Future Due Payments	78
Coupon Book - Payment Agreements	79
Deposit Slip	108
Audit Report - Transactions	38
Check Number Change	
Audit Report - Transactions	38
Checklist	
Appointment Checklist Items	
Custom Practice Information Report	82
Child	
Number or Child Patients	
Practice Statistics Report	246
Percent or Child Patients	
Practice Statistics Report	246
City	
Guarantor City	
Collections Manager List	70
Insurance Carrier City and State	
Insurance Eligibility Report	146
Patient City	
Patient List (Filtered)	206
Letter Merge Reports	152
Practice City	
Registration Information Report	294
Practice City State and ZIP Code	
Letter Merge Reports	152
Claim	
Amount of Claim	
Insurance Claims Not Sent Report	142
Claim Amount	
Secondary Insurance Claims Not Created Report	306
Insurance Transaction Analysis Report	148
Claim Date	
Insurance Claims Not Sent Report	142
Claim Expiration Date	
Procedures Not Attached to Insurance Report	258
Secondary Insurance Claims Not Created Report	306
Insurance Claims Not Sent Report	142
Claim Format	
Insurance Carrier List	132
Claim On Hold Date	
Insurance Claim Aging Report	140
Claim Payment Received Date	
Insurance Transaction Analysis Report	148
Claim Re-sent Date	
Insurance Claim Aging Report	140
Claim Sent Date	
Insurance Transaction Analysis Report	148
Insurance Claim Aging Report	140
Claim Tracer Date	
Insurance Claim Aging Report	140
Do not Print Dental Diagnostic Codes on Claim	
Insurance Carrier List	132
Grand Total Number of Insurance Claims Sent	
Insurance Transaction Analysis Report	148
Grand Total Number of Paid/Received Claims	
Insurance Transaction Analysis Report	148
Insurance Claim Note	
Patient Notes Report	208
Pending Claims	
Patient Route Slip	216
Primary Claim Date	
Secondary Insurance Claims Not Created Report	306
Remarks for Unusual Service	
Walkout - Doctor's Statement	356
Rendering Provider NPI Number	
Dental Encounters Report	106
Replace Initial Zero of Procedure Code on Claims	
Insurance Carrier List	132
Total Amount of Account Balances Aged 1 - 30 with Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 1 - 30 with Primary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 1 - 30 with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 121 - 150 with Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 121 - 150 with Primary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 121 - 150 with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 151 - 180 with Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 151 - 180 with Primary Claims	
Insurance Claim Aging Report	140

Claim (continued)

Total Amount of Account Balances Aged 151 - 180 with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 181+ with Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 181+ with Primary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 181+ with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 31 - 60 with Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 31 - 60 with Primary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 31 - 60 with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 61 - 90 with Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 61 - 90 with Primary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 61 - 90 with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 91 - 120 with Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 91 - 120 with Primary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 91 - 120 with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances with Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances with Primary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances with Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Estimated Insurance Portion for Primary and Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Estimated Insurance Portion for Primary Claims	
Insurance Claim Aging Report	140
Total Amount of Estimated Insurance Portion for Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Primary and Secondary Claims not Sent	
Insurance Claims Not Sent Report	142

Total Amount of Primary Claims not Sent	
Insurance Claims Not Sent Report	142
Total Amount of Secondary Claims not Created	
Secondary Insurance Claims Not Created Report	306
Total Amount of Secondary Claims not Sent	
Insurance Claims Not Sent Report	142
Total Number of Insurance Claims Sent	
Insurance Transaction Analysis Report	148
Total Number of Paid/Received Claims	
Insurance Transaction Analysis Report	148

Clinic

20+ Years Old for Financial Class Type for Clinic	
UDS - Insurance Financial Class Report	330
Account Clinic	
Collections Manager List	70
Aged Amount 0 - 30 for Clinic	
Aging/Credit Balance Report	6
Aged Amount 121 - 150 for Clinic	
Aging/Credit Balance Report	6
Aged Amount 151 - 180 for Clinic	
Aging/Credit Balance Report	6
Aged Amount 31 - 60 for Clinic	
Aging/Credit Balance Report	6
Aged Amount 61 - 90 for Clinic	
Aging/Credit Balance Report	6
Aged Amount 90 - 120 for Clinic	
Aging/Credit Balance Report	6
Aged Amount Over 180 for Clinic	
Aging/Credit Balance Report	6
Amount Billed to Insurance for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Applied Credit Adjustments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Applied Insurance Payments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Applied Payments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Beginning Balances for Clinic	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Amount of Charge Adjustments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Charges for Clinic	
Day Sheet Report	100
Amount of Credit Initial Balances for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Credit Special Adjustments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100

Clinic (continued)

Analysis Summary Report - Daily	8	Amount of Other Credit Initial Balances for Clinic	
Amount of Debit Initial Balances for Clinic		Analysis Summary Report - Standard	12
Analysis Summary Report - Standard	12	Analysis Summary Report - Daily	8
Day Sheet Report	100	Amount of Other Credit Special Adjustments for Clinic	
Analysis Summary Report - Daily	8	Analysis Summary Report - Standard	12
Amount of Debit Special Adjustments for Clinic		Analysis Summary Report - Daily	8
Analysis Summary Report - Standard	12	Amount of Procedures for Clinic	
Day Sheet Report	100	RVU Production Summary Report	298
Analysis Summary Report - Daily	8	Production Summary Report	260
Amount of Ending Balances for Clinic		Amount of Suspended Credit Adjustments for Clinic	
Analysis Summary Report - Standard	12	Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8	Day Sheet Report	100
Amount of Finance Charges for Clinic		Analysis Summary Report - Daily	8
Analysis Summary Report - Standard	12	Amount of Suspended Insurance Payments for Clinic	
Day Sheet Report	100	Analysis Summary Report - Standard	12
Finance Charge Report	124	Day Sheet Report	100
Analysis Summary Report - Daily	8	Analysis Summary Report - Daily	8
Amount of Lab Expenses for Clinic		Amount of Suspended Payments for Clinic	
RVU Day Sheet Report	296	Analysis Summary Report - Standard	12
Amount of Lab Expenses for Medicaid Procedures for Clinic		Day Sheet Report	100
RVU Production Summary Report	298	Analysis Summary Report - Daily	8
Amount of Lab Expenses of Non-Medicaid Procedures for Clinic		Average Amount of Adjustments for Clinic	
RVU Production Summary Report	298	Day Sheet (Adjustments) Report	90
Amount of Lab Expenses of Procedures for Clinic		Average Amount of Medicaid Procedures for Clinic	
RVU Production Summary Report	298	RVU Production Summary Report	298
Amount of Late Charges for Clinic		Production Summary Report	260
Analysis Summary Report - Standard	12	Average Amount of Non-Medicaid Procedures for Clinic	
Day Sheet Report	100	RVU Production Summary Report	298
Late Charge Report	150	Production Summary Report	260
Analysis Summary Report - Daily	8	Average Amount of Procedures for Clinic	
Amount of Medicaid Procedures for Clinic		RVU Production Summary Report	298
RVU Production Summary Report	298	Production Summary Report	260
Production Summary Report	260	Average Charge per Patient for Clinic	
Amount of Net Change for Clinic		Analysis Summary Report - Standard	12
Analysis Summary Report - Standard	12	Day Sheet Report	100
Analysis Summary Report - Daily	8	Analysis Summary Report - Daily	8
Amount of Non-Medicaid Procedures for Clinic		Average Payment Amount for Clinic	
RVU Production Summary Report	298	Day Sheet (Receipts) Report	98
Production Summary Report	260	Average Production per Patient at Clinic from Referral Source	
Amount of Other Applied Credit Adjustments for Clinic		Referral Analysis Report	282
Analysis Summary Report - Standard	12	Average Production per Patient for Clinic	
Day Sheet Report	100	Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8	Day Sheet Report	100
Amount of Other Applied Credit Initial Balances for Clinic		Analysis Summary Report - Daily	8
Day Sheet Report	100	Balance (as of a Date) for Clinic	
Amount of Other Applied Credit Special Adjustments for Clinic		Day Sheet Report	100
Day Sheet Report	100	Charges for Clinic	
Amount of Other Applied Insurance Payments for Clinic		Analysis Summary Report - Standard	12
Analysis Summary Report - Standard	12	Analysis Summary Report - Daily	8
Day Sheet Report	100	Clinic	
Analysis Summary Report - Daily	8	Analysis Summary Report - Daily	8
Amount of Other Applied Payments for Clinic		Analysis Summary Report - Standard	12
Analysis Summary Report - Standard	12	Appointment Cycle Time Report	16
Day Sheet Report	100	Assigned Rights Report	24
Analysis Summary Report - Daily	8	Audit Report - Clinics	30
Amount of Other Applied Payments for Clinic		Audit Report - Combined	32
Analysis Summary Report - Standard	12	Audit Report - Patients	34
Day Sheet Report	100	Audit Report - Providers/Staff	36
Analysis Summary Report - Daily	8	Audit Rights Report - Assigned Individually	40
		Continuing Care Display List	76
		Day Sheet (Adjustments) Report	90

Clinic (continued)

Day Sheet (Adjustments) Report	90	Net RVU of Medicaid Procedures for Clinic RVU Production Summary Report	298
Day Sheet (Receipts) Report	98	Net RVU of Non-Medicaid Procedures for Clinic RVU Production Summary Report	298
Day Sheet Report	100	Net RVU of Procedures for Clinic RVU Production Summary Report	298
Day Sheet Report	100	Number <19 Years Old for Financial Class Type for Clinic	
Deposit Slip	108	UDS - Insurance Financial Class Report	330
Deposit Slip	108	Number of All Genders for Clinic UDS - Age/Gender Report	322
Document Center Document	112	Number of Charts Sampled in Clinic UDS - Sealant Statistics Report	340
Document Center List	114	Number of Females for Clinic UDS - Age/Gender Report	322
Finance Charge Report	124	Number of Males for Clinic UDS - Age/Gender Report	322
Finance Charge Report	124	Number of Medicaid and Medicare Patients at Clinic UDS - Medicaid/Medicare Report	334
Initial Health History Report	130	Number of Medicaid and Medicare Patients in First Age Group at Clinic	
Insurance Carrier Production - Full Report	136	UDS - Medicaid/Medicare Report	334
Insurance Claims Not Sent Report	142	Number of Medicaid and Medicare Patients in Second Age Group at Clinic	
Insurance Transaction Analysis Report	148	UDS - Medicaid/Medicare Report	334
Late Charge Report	150	Number of Medicaid Patients at Clinic UDS - Medicaid/Medicare Report	334
Late Charge Report	150	Number of Medicaid Patients in First Age Group at Clinic	
Operator Day Sheet Report	188	UDS - Medicaid/Medicare Report	334
Oral Health Education Report	192	Number of Medicaid Patients in Second Age Group at Clinic	
Patient Health Assessment Report	198	UDS - Medicaid/Medicare Report	334
Patient List	204	Number of Medicare Patients at Clinic UDS - Medicaid/Medicare Report	334
Patient List (Filtered)	206	Number of Medicare Patients in First Age Group at Clinic	
Periodontal Exam Report	240	UDS - Medicaid/Medicare Report	334
Practice Organization List	244	Number of Medicare Patients in Second Age Group at Clinic	
Pre-Treatment Estimates Not Sent Report	254	UDS - Medicaid/Medicare Report	334
Procedures Not Attached to Insurance Report	258	Number of New Patients for Clinic Analysis Summary Report - Standard	12
Production Summary Report	260	Analysis Summary Report - Daily	8
Provider IDs List	272	Number of Other Gender for Clinic UDS - Age/Gender Report	322
Provider Revenue - Allocations Report	274	Number of Patients at Clinic from Referral Source Referral Analysis Report	282
Provider Revenue - Charges Report	276	Number of Patients Seen at Clinic Analysis Summary Report - Standard	12
Provider Revenue - Credits Report	278	Day Sheet Report	100
Referral Analysis Report	282	Analysis Summary Report - Daily	8
RVU Day Sheet Report	296	Number of Patients with Moderate to High Risk of Car- ies in Clinic	
RVU Production Summary Report	298	UDS - Sealant Statistics Report	340
RVU Utilization Report	304	Number of Patients with Moderate to High Risk of Caries who Got Sealants on Permanent First Molars in Clinic	
Suspended Credits Report	312	UDS - Sealant Statistics Report	340
UDS - Age/Gender Report	322	Number of Patients with Status for Clinic UDS - Patient Status Report	338
UDS - Insurance Financial Class Report	330		
UDS - Insurance Financial Class Report (2013)	332		
UDS - Medicaid/Medicare Report	334		
UDS - Patient Status Report	338		
UDS - Sealant Statistics Report	340		
UDS - Tobacco Use and Intervention Report	342		
Utilization Report	354		
Aging/Credit Balance Report	6		
Clinic Change			
Audit Report - Patients	34		
Audit Report - Providers/Staff	36		
Audit Report - Clinics	30		
Clinic Number			
Audit Report - Transactions	38		
Clinic Number Change			
Audit Report - Transactions	38		
Clinic of Access			
Patient Information Accessed Report	200		
Clinic TIN Number			
Provider IDs List	272		
Clinical Note Clinic			
Clinical Notes Report	64		
Net RVU for Clinic			
RVU Day Sheet Report	296		

Clinic (continued)

Number of Unknown Gender for Clinic		Total Number of Payment Type Items for Clinic	
UDS - Age/Gender Report	322	Deposit Slip	108
Number of Users for Financial Class Type for Clinic		Total Numerator Codes for All Clinics	
UDS - Insurance Financial Class Report	330	Oral Health Education Report	192
Patient Clinic		Periodontal Exam Report	240
Patient List (Filtered)	206	Initial Health History Report	130
Percent of Medicaid Procedures for Clinic		Total Numerator Codes for Clinic	
RVU Production Summary Report	298	Oral Health Education Report	192
Production Summary Report	260	Periodontal Exam Report	240
Percent of Non-Medicaid Procedures for Clinic		Initial Health History Report	130
RVU Production Summary Report	298	Total Percent for All Clinics	
Production Summary Report	260	Oral Health Education Report	192
Percent of Procedures for Clinic		Periodontal Exam Report	240
RVU Production Summary Report	298	Initial Health History Report	130
Production Summary Report	260	Total Percent for Clinic	
Previous Balance for Clinic		Oral Health Education Report	192
Day Sheet Report	100	Periodontal Exam Report	240
Production at Clinic from Referral Source		Initial Health History Report	130
Referral Analysis Report	282	Total Production at Clinics from Referral Source	
Quantity of Adjustments for Clinic		Referral Analysis Report	282
Day Sheet (Adjustments) Report	90	Clinical Attachment Level	
Quantity of Medicaid Procedures for Clinic		Clinical Attachment Level	
RVU Production Summary Report	298	Perio - Data Chart Report	230
Production Summary Report	260	Perio - Combined Graphic & Data Chart Report	228
Quantity of Non-Medicaid Procedures for Clinic		Clinical Attachment Level (Facial)	
RVU Production Summary Report	298	Perio - Exam Comparison Report	232
Production Summary Report	260	Perio - Combined Graphic & Data Chart Report	228
Quantity of Payments for Clinic		Clinical Attachment Level (Lingual)	
Day Sheet (Receipts) Report	98	Perio - Exam Comparison Report	232
Quantity of Procedures for Clinic		Perio - Combined Graphic & Data Chart Report	228
RVU Production Summary Report	298	Clinical Attachment Level Graphic Chart	
Production Summary Report	260	Perio - Exam Comparison Report	232
RVU for Clinic		Clinical Information	
RVU Day Sheet Report	296	Number of TCs (Transition of Care) and Referrals where	
Suspended Credit Amount for Clinic		Clinical Information Reconciliation Was Performed	
Aging/Credit Balance Report	6	Meaningful Use Measure Calculation List	156
Total Amount of Adjustments for Clinic		Clinical Note	
Day Sheet (Adjustments) Report	90	Clinical Note	
Total Amount of Payment Type for Clinic		Patient Notes Report	208
Deposit Slip	108	Patient Chart and Progress Notes Printout	194
Total Amount of Payments for Clinic		Clinical Note Clinic	
Day Sheet (Receipts) Report	98	Clinical Notes Report	64
Total Amount of Suspended Credits for Clinic		Clinical Note Date	
Suspended Credits Report	312	Patient Notes Report	208
Total Average Production per Patient at Clinics from Referral Source		Clinical Notes Report	64
Referral Analysis Report	282	Clinical Note Number	
Total Denominator Codes for All Clinics		Clinical Notes Report	64
Oral Health Education Report	192	Clinical Note Page Number	
Periodontal Exam Report	240	Clinical Notes Report	64
Initial Health History Report	130	Clinical Note Provider	
Total Denominator Codes for Clinic		Clinical Notes Report	64
Oral Health Education Report	192	Clinical Note Status	
Periodontal Exam Report	240	Clinical Notes Report	64
Initial Health History Report	130	Clinical Note Text	
Total Number of New Patients for Clinic		Clinical Notes Report	64
Day Sheet Report	100	Clinical Note Time	
Total Number of Patients at Clinics from Referral Source		Clinical Notes Report	64
Referral Analysis Report	282	Number of Patients with Searchable Clinical Notes	
		Meaningful Use Measure Calculation List	156

Clinical Summary

Number of Office Visits where Patient Received CS (Clinical Summary)	
Meaningful Use Measure Calculation List	156

Co-Pay

Amount of Co-pays for Insurance Carrier Utilization Report	354
Amount of Fees - Co-pays for Insurance Carrier Utilization Report	354
Co-pay Amount	
Standard Coverage Tables Report	310
Utilization Report	354
Insurance Coverage Tables Report	144
Co-pay Calculation for Insurance Portion Insurance Coverage Tables Report	144
Co-pay Used in Calculations Insurance Coverage Tables Report	144
Total Amount of Co-pays Utilization Report	354
Total Amount of Fees - Co-pays Utilization Report	354

Code

ADA Code	
Day Sheet (Charges and Receipts) Report	94
Dental Encounters Report	106
Fee Schedules Report	122
Insurance Carrier Production - Full Report	136
Multi-Code List	182
Operator Day Sheet Report	188
Patient Chart and Progress Notes Printout	194
Patient List (Filtered)	206
Patient Treatment Case Report	218
Practice Treatment Case Report	248
Procedure Code List	256
Procedures Not Attached to Insurance Report	258
Production Summary Report	260
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Provider Revenue - Allocations Report	274
Provider Revenue - Charges Report	276
Provider Revenue - Credits Report	278
RVU Day Sheet Report	296
RVU Production Summary Report	298
RVU Schedules Report	302
RVU Utilization Report	304
Standard Coverage Tables Report	310
Treatment Case Report	314
Treatment Plan Approval Report	316
Treatment Plan Approval Status Report	318
Unscheduled Treatment Plans (Detailed) Report	350
Updated Dental Insurance Payment Table Report	352
Utilization Report	354
Walkout - Doctor's Statement	356
Appointment Cycle Time Report	16
ADA Code Abbreviated Description	
Procedure Code List	256
Multi-Code List	182
ADA Code Description	
Fee Schedules Report	122
Insurance Carrier Production - Full Report	136

Multi-Code List	182
Patient Chart and Progress Notes Printout	194
Patient Ledger Report	202
Patient Treatment Case Report	218
Practice Treatment Case Report	248
Procedure Code List	256
Procedures Not Attached to Insurance Report	258
Production Summary Report	260
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Provider Revenue - Allocations Report	274
Provider Revenue - Charges Report	276
Provider Revenue - Credits Report	278
RVU Day Sheet Report	296
RVU Production Summary Report	298
RVU Schedules Report	302
RVU Utilization Report	304
Treatment Case Report	314
Treatment Plan Approval Report	316
Treatment Plan Approval Status Report	318
Unscheduled Treatment Plans (Detailed) Report	350
Utilization Report	354
Walkout - Doctor's Statement	356
Walkout - Family Walkout	358
Day Sheet (Charges and Receipts) Report	94
ADA Code Description for Today's Completed Work Patient Chart Printout	196
ADA Code Description for Treatment-planned Procedure Patient Chart Printout	196
ADA Code Description of Completed Treatment Referral Recap Report	284
ADA Code Description of Treatment Still in Progress Referral Recap Report	284
ADA Code Description of Treatment-planned Procedure Referral Slip	286
ADA Code Description or Transaction Description Operator Day Sheet Report	188
ADA Code of Completed Treatment Referral Recap Report	284
ADA Code of Treatment Still in Progress Referral Recap Report	284
ADA Code of Treatment-planned Procedure Referral Slip	286
Alternate ADA Code Procedure Code List	256
Insurance Carrier List	132
AMA CPT Code Procedure Code List	256
Medical Code List	180
AMA CPT Code Description Medical Code List	180
Beginning ADA Code Insurance Coverage Tables Report	144
CPT Code Procedure Code List	256
Dental Diagnostic Code Multi-Code List	182
Procedure Code List	256
Dental Diagnostic Code List	104

Code (continued)

Dental Diagnostic Code Description		Other Retroactive Payment Amount Collected for Patient	
Dental Diagnostic Code List	104	UDS - Patient Related Revenue Report	336
ICD-9-CM Code		Penalty or Payback Amount Collected for Patient	
Patient List (Filtered)	206	UDS - Patient Related Revenue Report	336
Medical Code List	180	Percent Collected	
ICD-9-CM Code Description		Provider A/R Totals - Daily Report	264
Medical Code List	180	Percent Collected for Provider	
Medical Code		Provider A/R Totals - Standard Report	266
Procedure Code List	256	Provider A/R Totals - Daily Report	264
Modifier Code		Subtotal of Amount Collected for Financial Class Type	
Medical Code List	180	UDS - Patient Related Revenue Report	336
Modifier Code Description		Subtotal of Amount Collected for Payer Category	
Medical Code List	180	UDS - Patient Related Revenue Report	336
Next Appointment ADA Code		Subtotal of Other Retroactive Payment Amount Collected for Financial Class Type	
Patient Route Slip	216	UDS - Patient Related Revenue Report	336
Next Appointment ADA Code Description		Subtotal of Other Retroactive Payment Amount Collected for Payer Category	
Patient Route Slip	216	UDS - Patient Related Revenue Report	336
Place of Service Code		Subtotal of Penalty or Payback Amount Collected for Financial Class Type	
Medical Code List	180	UDS - Patient Related Revenue Report	336
Place of Service Code Description		Subtotal of Penalty or Payback Amount Collected for Payer Category	
Medical Code List	180	UDS - Patient Related Revenue Report	336
Replace Initial Zero of Procedure Code on Claims		Subtotal of Wrap Around or Reconciliation Amount Collected for Financial Class Type (Current Year)	
Insurance Carrier List	132	UDS - Patient Related Revenue Report	336
Tooth Code		Subtotal of Wrap Around or Reconciliation Amount Collected for Financial Class Type (Previous Years)	
Perio - Data Chart Report	230	UDS - Patient Related Revenue Report	336
Perio - Pocket Depths Only Report	236	Subtotal of Wrap Around or Reconciliation Amount Collected for Payer Category (Current Year)	
Perio - Combined Graphic & Data Chart Report	228	UDS - Patient Related Revenue Report	336
Transaction Type/Code		Subtotal of Wrap Around or Reconciliation Amount Collected for Payer Category (Previous Years)	
Insurance Transaction Analysis Report	148	UDS - Patient Related Revenue Report	336
Type of Service Code		Total Amount Collected for Financial Class Type	
Medical Code List	180	UDS - Patient Related Revenue Report	336
Type of Service Code Description		Total Amount Collected for Patient	
Medical Code List	180	UDS - Patient Related Revenue Report	336
Collections		Total Amount Collected for Payer Category	
Amount Collected for Patient		UDS - Patient Related Revenue Report	336
UDS - Patient Related Revenue Report	336	Total Amount of - Adjustments (Collection)	
Amount of - Adjustments (Collection)		Provider A/R Totals - Standard Report	266
Provider A/R Totals - Daily Report	264	Provider A/R Totals - Daily Report	264
Amount of - Adjustments (Collection) for Provider		Total Amount of + Adjustments (Collection)	
Provider A/R Totals - Standard Report	266	Provider A/R Totals - Standard Report	266
Provider A/R Totals - Daily Report	264	Provider A/R Totals - Daily Report	264
Amount of + Adjustments (Collection)		Total Amount of - Adjustments (Collection) for Provider	
Provider A/R Totals - Standard Report	266	Provider A/R Totals - Standard Report	266
Amount of + Adjustments (Collection) for Provider		Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266	Total Amount of + Adjustments (Collection)	
Provider A/R Totals - Daily Report	264	Provider A/R Totals - Standard Report	266
Collection		Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266	Total Collection Amount	
Provider A/R Totals - Daily Report	264	Provider A/R Totals - Standard Report	266
Collection Adjustments		Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266	Total Other Retroactive Payment Amount Collected for Financial Class Type	
Provider A/R Totals - Daily Report	264	UDS - Patient Related Revenue Report	336
Collection Amount		Total Other Retroactive Payment Amount Collected for Patient	
Provider A/R Totals - Daily Report	264	UDS - Patient Related Revenue Report	336
Collection Amount for Provider		Total Other Retroactive Payment Amount Collected for Payer Category	
Provider A/R Totals - Standard Report	266	UDS - Patient Related Revenue Report	336
Provider A/R Totals - Daily Report	264		

Collections (continued)

Total Penalty or Payback Amount Collected for Financial Class Type	
UDS - Patient Related Revenue Report	336
Total Penalty or Payback Amount Collected for Patient	
UDS - Patient Related Revenue Report	336
Total Penalty or Payback Amount Collected for Payer Category	
UDS - Patient Related Revenue Report	336
Total Percent Collected	
Provider A/R Totals - Standard Report	266
Provider A/R Totals - Daily Report	264
Total Wrap Around or Reconciliation Amount Collected for Financial Class Type (Current Year)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Financial Class Type (Previous Years)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Patient (Current Year)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Patient (Previous Years)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Payer Category (Current Year)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Payer Category (Previous Years)	
UDS - Patient Related Revenue Report	336
Wrap Around or Reconciliation Amount Collected for Patient (Current Year)	
UDS - Patient Related Revenue Report	336
Wrap Around or Reconciliation Amount Collected for Patient (Previous Years)	
UDS - Patient Related Revenue Report	336

Comments

Case Comments	
Practice Treatment Case Report	248
Patient Treatment Case Report	218

Comparison

Amount of Current Charges Compared to Fee Schedule for Provider	
Day Sheet (Charges and Receipts) Report	94
Perio Exam Comparison Data Chart	
Perio - Combined Graphic & Data Chart Report	228
Perio Exam Comparison Graphic Chart	
Perio - Combined Graphic & Data Chart Report	228
Total Amount of Current Charges Compared to Fee Schedule	
Day Sheet (Charges and Receipts) Report	94

Completed

ADA Code Description for Today's Completed Work	
Patient Chart Printout	196
ADA Code Description of Completed Treatment	
Referral Recap Report	284
ADA Code of Completed Treatment	
Referral Recap Report	284

Amount for Today's Completed Work	
Patient Chart Printout	196
Amount of Completed Procedures for Patient	
Procedures Not Attached to Insurance Report	258
Completed Date	
Referred To Doctor Report	292
Date of Completed Procedure	
Walkout - Doctor's Statement	356
Date of Completed Treatment	
Referral Recap Report	284
Percent of Completed Cases	
Practice Treatment Case Report	248
Tooth Number for Today's Completed Work	
Patient Chart Printout	196
Tooth Number of Completed Treatment	
Referral Recap Report	284
Tooth Surface of Completed Treatment	
Referral Recap Report	284
Total Amount of Charges for Today's Completed Work	
Patient Chart Printout	196
Total Amount of Completed Procedures	
Walkout - Doctor's Statement	356
Procedures Not Attached to Insurance Report	258

Condition

Denominator Codes for Provider	
Oral Health Education Report	192
Periodontal Exam Report	240
Initial Health History Report	130
Numerator Codes for Provider	
Oral Health Education Report	192
Periodontal Exam Report	240
Initial Health History Report	130
Total Denominator Codes for All Clinics	
Oral Health Education Report	192
Periodontal Exam Report	240
Initial Health History Report	130
Total Denominator Codes for Clinic	
Oral Health Education Report	192
Periodontal Exam Report	240
Initial Health History Report	130
Total Numerator Codes for All Clinics	
Oral Health Education Report	192
Periodontal Exam Report	240
Initial Health History Report	130
Total Numerator Codes for Clinic	
Oral Health Education Report	192
Periodontal Exam Report	240
Initial Health History Report	130

Consent Form

Consent Form	
Treatment Case Report	314
Patient Signature	
Treatment Case Report	314
Practice Signature	
Treatment Case Report	314
Representative Signature	
Treatment Case Report	314
Signature Date	
Treatment Case Report	314
Signer Name	
Treatment Case Report	314

Consent Form (continued)

Staff Signature	
Treatment Case Report	314
Contact	
Insurance Carrier Contact Name	
Provider IDs List	272
Insurance Carrier List	132
Patient Contact	
Patient List (Filtered)	206
Continuing Care	
Continuing Care Appointment Date	
Continuing Care Display List	76
Continuing Care Due Date	
Letter Merge Reports	152
Patient List (Filtered)	206
Continuing Care Display List	76
Continuing Care Due Dates	
Patient Route Slip	216
Continuing Care Note	
Patient Notes Report	208
Letter Merge Reports	152
Continuing Care Note Continuing Care Due Date	
Patient Notes Report	208
Continuing Care Note Continuing Care Type	
Patient Notes Report	208
Continuing Care Prior Treatment Date	
Continuing Care Display List	76
Continuing Care Prior Work Date	
Letter Merge Reports	152
Continuing Care Status	
Continuing Care Display List	76
Continuing Care Type	
Continuing Care Display List	76
Continuing Care Type Description	
Letter Merge Reports	152
Continuing Care Type Name	
Patient List (Filtered)	206
Letter Merge Reports	152
Next Continuing Care Appointment Date	
Patient Route Slip	216
Letter Merge Reports	152
Next Continuing Care Appointment Provider	
Letter Merge Reports	152
Next Continuing Care Appointment Reason	
Letter Merge Reports	152
Next Continuing Care Appointment Time	
Letter Merge Reports	152
Number of Patients Eligible for Prophy Continuing Care	
Practice Statistics Report	246
Number of Patients not on Prophy Continuing Care	
Practice Statistics Report	246
Percent of Patients Eligible for Prophy Continuing Care	
Practice Statistics Report	246
Percent of Patients not on Prophy Continuing Care	
Practice Statistics Report	246
Count	
Unique Patient Count for Provider	
RVU Day Sheet Report	296
Unique Visit Count for Provider	
RVU Day Sheet Report	296

Country

Practice Country	
Registration Information Report	294

County

Patient County	
Patient List (Filtered)	206

Coverage

Amount of Co-pays for Insurance Carrier	
Utilization Report	354
Amount of Fees - Co-pays for Insurance Carrier	
Utilization Report	354
Amount of Other Deductible Owed by Family to Primary Insurance	
Patient Route Slip	216
Amount of Other Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Amount of Other Deductible Owed to Primary Insurance	
Patient Route Slip	216
Amount of Other Deductible Owed to Secondary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed by Family to Primary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed to Primary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed to Secondary Insurance	
Patient Route Slip	216
Amount of Primary Insurance Benefits Remaining	
Unscheduled Treatment Plans (Detailed) Report	350
Patient Route Slip	216
Amount of Primary Insurance Benefits Used	
Patient Route Slip	216
Amount of Primary Insurance Paid Benefits YTD for Family	
Treatment Case Report	314
Amount of Remaining Benefits for Primary Insurance	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Amount of Remaining Benefits for Secondary Insurance	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Amount of Secondary Insurance Benefits Remaining	
Unscheduled Treatment Plans (Detailed) Report	350
Patient Route Slip	216
Amount of Secondary Insurance Benefits Used	
Patient Route Slip	216
Amount of Secondary Paid Benefits for Family	
Treatment Case Report	314
Amount of Secondary Paid Benefits for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218

Coverage (continued)

Amount of Standard Deductible Owed by Family to Primary Insurance		Insurance Claim Aging Report	140
Patient Route Slip	216	Last Eligibility Date for Primary Insurance Coverage	
Amount of Standard Deductible Owed by Family to Secondary Insurance		Treatment Plan Approval Status Report	318
Patient Route Slip	216	Treatment Plan Approval Report	316
Amount of Standard Deductible Owed to Primary Insurance		Last Eligibility Date for Secondary Insurance Coverage	
Patient Route Slip	216	Treatment Plan Approval Status Report	318
Amount of Standard Deductible Owed to Secondary Insurance		Treatment Plan Approval Report	316
Patient Route Slip	216	Lifetime/Individual/Standard Deductible	
Benefit Renewal Month		Insurance Carrier List	132
Insurance Carrier List	132	Lifetime/Individual/Standard Other Deductible	
Coverage Percent		Insurance Carrier List	132
Standard Coverage Tables Report	310	Lifetime/Individual/Standard Preventative Deductible	
Insurance Coverage Tables Report	144	Insurance Carrier List	132
Coverage Table Name		Maximum Primary Insurance Benefit Amount	
Standard Coverage Tables Report	310	Patient Route Slip	216
Deductible Type		Maximum Secondary Insurance Benefit Amount	
Standard Coverage Tables Report	310	Patient Route Slip	216
Insurance Coverage Tables Report	144	Other Deductible Met	
Do not Bill to Dental Insurance if 0% Coverage		Insurance Carrier List	132
Insurance Carrier List	132	Other Deductible Owed by Family to Primary Insurance	
Estimated Amount of Deductibles to Be Applied		Treatment Case Report	314
Treatment Case Report	314	Other Deductible Owed by Family to Secondary Insurance	
Patient Treatment Case Report	218	Treatment Case Report	314
Family Benefits		Other Deductible Owed by Patient to Primary Insurance	
Insurance Carrier List	132	Treatment Case Report	314
Individual Benefits		Patient Treatment Case Report	218
Insurance Carrier List	132	Other Deductible Owed by Patient to Secondary Insurance	
Insurance Coverage Percent (Basic) for Primary Insurance		Treatment Case Report	314
Patient Route Slip	216	Patient Treatment Case Report	218
Insurance Coverage Percent (Basic) for Secondary Insurance		Preventative Deductible Met	
Patient Route Slip	216	Insurance Carrier List	132
Insurance Coverage Percent (Major) for Primary Insurance		Preventative Deductible Owed by Family to Primary Insurance	
Patient Route Slip	216	Treatment Case Report	314
Insurance Coverage Percent (Major) for Secondary Insurance		Preventative Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216	Treatment Case Report	314
Insurance Coverage Percent (Orthodontics) for Primary Insurance		Patient Treatment Case Report	218
Patient Route Slip	216	Preventative Deductible Owed by Patient to Primary Insurance	
Insurance Coverage Percent (Orthodontics) for Secondary Insurance		Treatment Case Report	314
Patient Route Slip	216	Patient Treatment Case Report	218
Insurance Coverage Percent (Preventative) for Primary Insurance		Preventative Deductible Owed by Patient to Secondary Insurance	
Patient Route Slip	216	Treatment Case Report	314
Insurance Coverage Percent (Preventative) for Secondary Insurance		Patient Treatment Case Report	218
Patient Route Slip	216	Primary Insurance Benefits Expiration Date for Family	
Insurance Coverage Type		Treatment Case Report	314
Insurance Claims Not Sent Report	142	Primary Insurance Benefits Expiration Date for Patient	
Insurance Eligibility Report	146	Treatment Case Report	314
Pre-Treatment Estimate Aging Report	252	Patient Treatment Case Report	218
Pre-Treatment Estimates Not Sent Report	254	Primary Insurance Benefits Remaining	
		Letter Merge Reports	152
		Primary Insurance Benefits Renewal Month	
		Patient Route Slip	216
		Secondary Eligibility Date	
		Appointment Book View Printout	14
		Secondary Insurance Benefits Expiration Date for Family	
		Treatment Case Report	314
		Secondary Insurance Benefits Expiration Date for Patient	
		Treatment Case Report	314
		Patient Treatment Case Report	218

Coverage (continued)

Secondary Insurance Benefits Remaining	
Letter Merge Reports	152
Secondary Insurance Benefits Renewal Month	
Patient Route Slip	216
Standard Deductible Met	
Insurance Carrier List	132
Standard Deductible Owed by Family to Primary Insurance	
Treatment Case Report	314
Standard Deductible Owed by Family to Secondary Insurance	
Treatment Case Report	314
Standard Deductible Owed by Patient to Primary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218
Standard Deductible Owed by Patient to Secondary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218

Coverage Table

Coverage Table Name	
Standard Coverage Tables Report	310

CPITN

Percent of Patients with Highest CPITN	
Caries Prevalence and Periodontal Index Report	52

CPOE

Number of Diagnostic Imaging Orders Recorded Using CPOE (Computerized Provider Order Entry)	
Meaningful Use Measure Calculation List	156
Number of Laboratory Tests Recorded Using CPOE (Computerized Provider Order Entry)	
Meaningful Use Measure Calculation List	156
Number of Patients with Medications Ordered Using CPOE (Computerized Provider Order Entry)	
Meaningful Use Measure Calculation List	156
Number of Prescriptions Ordered Using CPOE (Computerized Provider Order Entry)	
Meaningful Use Measure Calculation List	156
Number of Radiology Orders Recorded Using CPOE (Computerized Provider Order Entry)	
Meaningful Use Measure Calculation List	156

CPT Code

AMA CPT Code	
Procedure Code List	256
Medical Code List	180
AMA CPT Code Description	
Medical Code List	180
CPT Code	
Procedure Code List	256

Credit

Account Suspended Credit Amount	
Patient Route Slip	216
Amount of Credit Initial Balances	
Provider A/R Totals - Daily Report	264
Amount of Credit Initial Balances for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8

Amount of Credit Initial Balances for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Analysis Summary Report - Daily	8
Amount of Current Credits	
Walkout - Family Walkout	358
Amount of Current Suspended Credit Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of MTD Suspended Credit Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Other Applied Credit Adjustments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Other Applied Credit Adjustments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Other Applied Credit Initial Balances for Clinic	
Day Sheet Report	100
Amount of Other Applied Credit Initial Balances for Provider	
Day Sheet Report	100
Amount of Other Applied Credit Special Adjustments for Clinic	
Day Sheet Report	100
Amount of Other Applied Credit Special Adjustments for Provider	
Day Sheet Report	100
Amount of Other Credit Initial Balances for Clinic	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Amount of Other Credit Initial Balances for Provider	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Amount of Other Credit Special Adjustments for Clinic	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Amount of Other Credit Special Adjustments for Provider	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Amount of Suspended Credit Adjustments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Suspended Credit Adjustments for Previous Month for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Suspended Credit Adjustments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Suspended Credits	
Aging/Credit Balance Report	6

Credit (continued)

Amount of Suspended Credits for Guarantor		Insurance Transaction Analysis Report	148
Suspended Credits Report	312	Operator Day Sheet Report	188
Amount of YTD Applied Credit Adjustments for Provider		Adjustment Summary Report	4
Day Sheet (Charges and Receipts) Report	94	Total Amount of Credit Initial Balances	
Amount of YTD Suspended Credit Adjustments for Provider		Analysis Summary Report - Standard	12
Day Sheet (Charges and Receipts) Report	94	Day Sheet Report	100
Applied Credit Adjustment Amount		Provider A/R Totals - Daily Report	264
Analysis Summary Report - Standard	12	Provider A/R Totals - Standard Report	266
Analysis Summary Report - Daily	8	Analysis Summary Report - Daily	8
Credit		Total Amount of Credit Special Adjustments	
Day Sheet Report	100	Analysis Summary Report - Standard	12
Credit Amount		Day Sheet Report	100
Walkout - Family Walkout	358	Provider A/R Totals - Daily Report	264
Credit Balance (as of Date)		Provider A/R Totals - Standard Report	266
Practice Analysis Report	242	Analysis Summary Report - Daily	8
Credit Initial Balance		Total Amount of Current Applied Credit Adjustments	
Analysis Summary Report - Standard	12	Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Daily	8	Total Amount of Current Suspended Credit Adjustments	
Credit Special Adjustment Amount		Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Standard	12	Total Amount of MTD Applied Credit Adjustments	
Analysis Summary Report - Daily	8	Day Sheet (Charges and Receipts) Report	94
Grand Total Amount of Credit Adjustments		Total Amount of MTD Suspended Credit Adjustments	
Insurance Transaction Analysis Report	148	Day Sheet (Charges and Receipts) Report	94
Grand Total Number of Credit Adjustments		Total Amount of Other Applied Credit Adjustments	
Insurance Transaction Analysis Report	148	Analysis Summary Report - Standard	12
Other Applied Credit Adjustment Amount		Day Sheet Report	100
Analysis Summary Report - Standard	12	Analysis Summary Report - Daily	8
Analysis Summary Report - Daily	8	Total Amount of Other Applied Credit Initial Balances	
Other Credit Initial Balance		Day Sheet Report	100
Analysis Summary Report - Standard	12	Total Amount of Other Credit Initial Balances	
Analysis Summary Report - Daily	8	Analysis Summary Report - Standard	12
Other Credit Special Adjustment Amount		Analysis Summary Report - Daily	8
Analysis Summary Report - Standard	12	Total Amount of Suspended Credit Adjustments	
Analysis Summary Report - Daily	8	Analysis Summary Report - Standard	12
Patient Suspended Credit Amount		Day Sheet Report	100
Patient Route Slip	216	Analysis Summary Report - Daily	8
Percent of Suspended Credits		Total Amount of Suspended Credit Adjustments for Previous Month	
Aging/Credit Balance Report	6	Day Sheet (Charges and Receipts) Report	94
Suspended Credit Adjustment Amount		Total Amount of Suspended Credits for Clinic	
Analysis Summary Report - Standard	12	Suspended Credits Report	312
Analysis Summary Report - Daily	8	Total Amount of YTD Applied Credit Adjustments	
Suspended Credit Amount		Day Sheet (Charges and Receipts) Report	94
Continuing Care Display List	76	Total Amount of YTD Suspended Credit Adjustments	
Suspended Credit Amount for Clinic		Day Sheet (Charges and Receipts) Report	94
Aging/Credit Balance Report	6	Total Number of Credit Adjustments	
Suspended Credits		Insurance Transaction Analysis Report	148
Practice Analysis Report	242	Total Quantity of Credit Adjustments	
Total Amount of Applied Credit Adjustments		Day Sheet (Adjustments) Report	90
Analysis Summary Report - Standard	12	Total Revenue from Credit Adjustments	
Day Sheet Report	100	Provider Revenue - Charges Report	276
Analysis Summary Report - Daily	8	Provider Revenue - Credits Report	278
Total Amount of Applied Credit Adjustments for Previous Month		Provider Revenue - Summary Report	280
Day Sheet (Charges and Receipts) Report	94	Provider Revenue - Allocations Report	274
Total Amount of Credit Adjustments		Total Suspended Credits	
Day Sheet (Adjustments) Report	90	Aging/Credit Balance Report	6
Insurance Carrier Production - Full Report	136		
Insurance Carrier Production - Summary Report	138		

Credit Adjustment

Amount of Applied Credit Adjustments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Applied Credit Adjustments for Previous Month for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Applied Credit Adjustments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Current Applied Credit Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of MTD Applied Credit Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94
Average Amount of Credit Adjustments	
Day Sheet (Adjustments) Report	90
Credit Adjustment Amount	
Insurance Carrier Production - Full Report	136
Billing Statement	48
Credit Adjustment Amount for Insurance Plan	
Insurance Carrier Production - Summary Report	138
Insurance Carrier Production - Full Report	136
Grand Total Amount of Credit Adjustments	
Insurance Transaction Analysis Report	148
Grand Total Number of Credit Adjustments	
Insurance Transaction Analysis Report	148
Other Applied Credit Adjustment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Revenue for Provider from Credit Adjustments	
Provider Revenue - Charges Report	276
Provider Revenue - Credits Report	278
Provider Revenue - Summary Report	280
Provider Revenue - Allocations Report	274
Total Amount of Credit Adjustments	
Day Sheet (Adjustments) Report	90
Insurance Carrier Production - Full Report	136
Insurance Carrier Production - Summary Report	138
Insurance Transaction Analysis Report	148
Operator Day Sheet Report	188
Adjustment Summary Report	4
Total Amount of Suspended Credit Adjustments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Suspended Credit Adjustments for Previous Month	
Day Sheet (Charges and Receipts) Report	94
Total Amount of YTD Applied Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of YTD Suspended Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94
Total Number of Credit Adjustments	
Insurance Transaction Analysis Report	148
Total Quantity of Credit Adjustments	
Day Sheet (Adjustments) Report	90

Total Revenue from Credit Adjustments	
Provider Revenue - Charges Report	276
Provider Revenue - Credits Report	278
Provider Revenue - Summary Report	280
Provider Revenue - Allocations Report	274

Credit Card

Credit Card Number	
Billing Statement	48
Name on Credit Card	
Billing Statement	48
Total Amount of Credit Card Payments	
Operator Day Sheet Report	188
Type of Credit Card	
Billing Statement	48

Credit Card Terminal

Terminal Name	
Credit Card Transaction Report	80

Credit Card Type

Card Type	
Credit Card Transaction Report	80

Credit Special Adjustment

Amount of Credit Special Adjustments	
Provider A/R Totals - Daily Report	264
Amount of Credit Special Adjustments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Credit Special Adjustments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Analysis Summary Report - Daily	8
Other Credit Special Adjustment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Total Amount of Other Credit Special Adjustments	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8

Cross Coding

AMA CPT Code	
Procedure Code List	256
Medical Code List	180
AMA CPT Code Description	
Medical Code List	180
ICD-9-CM Code	
Patient List (Filtered)	206
Medical Code List	180
ICD-9-CM Code Description	
Medical Code List	180
Modifier Code	
Medical Code List	180
Place of Service Code	
Medical Code List	180
Place of Service Code Description	
Medical Code List	180
Type of Service Code	
Medical Code List	180
Type of Service Code Description	
Medical Code List	180

Current

Amount of Current Applied Credit Adjustments for Prov	
Day Sheet (Charges and Receipts) Report	94
Amount of Current Applied Payments for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Current Charge Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94
Amount of Current Charges	
Walkout - Family Walkout	358
Amount of Current Charges Billed to Insurance for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Current Charges Compared to Fee Schedule for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Current Credits	
Walkout - Family Walkout	358
Amount of Current Finance Charges for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Current Late Charges for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Current Suspended Credit Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Current Suspended Payments for Provider	
Day Sheet (Charges and Receipts) Report	94
Current Account Balance	
Billing Statement	48
Current Average Charge per Patient	
Day Sheet (Charges and Receipts) Report	94
Current Average Charge per Patient for Provider	
Day Sheet (Charges and Receipts) Report	94
Current Average Production per Patient	
Day Sheet (Charges and Receipts) Report	94
Current Average Production per Patient for Provider	
Day Sheet (Charges and Receipts) Report	94
Current Charges for Provider	
Day Sheet (Charges and Receipts) Report	94
Current Number of New Patients	
Day Sheet (Charges and Receipts) Report	94
Current Number of New Patients for Provider	
Day Sheet (Charges and Receipts) Report	94
Current Number of Patients Seen	
Day Sheet (Charges and Receipts) Report	94
Current Number of Patients Seen by Provider	
Day Sheet (Charges and Receipts) Report	94
Current Receivables	
Practice Analysis Report	242
Net Difference of Current Charges and Fee Schedule for Provider	
Day Sheet (Charges and Receipts) Report	94
Net Difference of Total Current Charges and Fee Schedule	
Day Sheet (Charges and Receipts) Report	94
Next Charge Amount (after 18 Months from Current Month)	
Future Due Payment Plan Report - Monthly Totals	126

Total Amount of Charges Remaining (after 18 Mos from Curr Mo)	
Future Due Payment Plan Report - Monthly Totals	126
Total Amount of Current Applied Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Applied Payments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Charge Adjustments	
Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Charges	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Charges Billed to Insurance	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Charges Compared to Fee Schedule	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Finance Charges	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Late Charges	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Suspended Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Current Suspended Payments	
Day Sheet (Charges and Receipts) Report	94
Total Number of Charges Remaining (after 18 Mos from Curr Mo)	
Future Due Payment Plan Report - Monthly Totals	126

Current Year

Subtotal of Wrap Around or Reconciliation Amount Collected for Financial Class Type (Current Year)	
UDS - Patient Related Revenue Report	336
Subtotal of Wrap Around or Reconciliation Amount Collected for Payer Category (Current Year)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Financial Class Type (Current Year)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Patient (Current Year)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Payer Category (Current Year)	
UDS - Patient Related Revenue Report	336
Wrap Around or Reconciliation Amount Collected for Patient (Current Year)	
UDS - Patient Related Revenue Report	336

Date

Adjustment Date	
Patient's Ledger Report	220
Allergy Discovery Date	
Patient List (Filtered)	206
Allocate Date	
Provider Revenue - Charges Report	276
Provider Revenue - Credits Report	278
Provider Revenue - Allocations Report	274
Amount of Debit Adjustments (for Date Range)	
Practice Analysis Report	242

Date (continued)

Amount of Finance Charges (for Date Range) Practice Analysis Report	242	Claim Tracer Date Insurance Claim Aging Report	140
Amount of Insured Charges (for Date Range) Practice Analysis Report	242	Clinical Note Date Patient Notes Report	208
Amount of Late Charges (for Date Range) Practice Analysis Report	242	Clinical Notes Report	64
Amount of Non-insured Charges (for Date Range) Practice Analysis Report	242	Completed Date Referred To Doctor Report	292
Amount of Other Debit Adjustments (for Date Range) Practice Analysis Report	242	Continuing Care Appointment Date Continuing Care Display List	76
Appointment Date		Continuing Care Due Date Letter Merge Reports	152
Appointment Reminder Cards	18	Patient List (Filtered)	206
As Soon As Possible List	22	Continuing Care Display List	76
Audit Report - Appointments	26	Continuing Care Due Dates Patient Route Slip	216
Daily Appointment List (DX1)	84	Continuing Care Note Continuing Care Due Date Patient Notes Report	208
Daily Appointment List Report	86	Continuing Care Prior Treatment Date Continuing Care Display List	76
Letter Merge Reports	152	Continuing Care Prior Work Date Letter Merge Reports	152
Operatory Appointment List Report	190	Credit Balance (as of Date) Practice Analysis Report	242
Patient List (Filtered)	206	Date	
Treatment Plan Approval Report	316	Appointment Book View Printout	14
Treatment Plan Approval Status Report	318	Document Center Document	112
Walkout - Family Walkout	358	Patient Ledger Report	202
Appointment Cycle Time Report	16	Provider A/R Totals - Daily Report	264
Appointment Date and Time		Analysis Summary Report - Daily	8
Insurance Eligibility Report	146	Date Appointment Broken	
Appointment Date Change		Unscheduled Appointment List (OM)	346
Audit Report - Appointments	26	Unscheduled Appointment List (DX1)	344
Balance (as of a Date)		Date Attached	
Day Sheet Report	100	Document Center List	114
Day Sheet (Charges and Receipts) Report	94	Date Insurance Last Updated Insurance Carrier List	132
Balance (as of a Date) for Clinic		Date of Access Patient Information Accessed Report	200
Day Sheet Report	100	Date of Change	
Balance (as of a Date) for Provider		Audit Report - Audit Log Status	28
Day Sheet Report	100	Audit Report - Clinics	30
Day Sheet (Charges and Receipts) Report	94	Audit Report - Combined	32
Beginning Balance (for Date Range) Practice Analysis Report	242	Audit Report - Patients	34
Bill Date		Audit Report - Providers/Staff	36
Walkout - Family Walkout	358	Audit Report - Transactions	38
Billing Date		Audit Rights Report - Assigned Individually	40
Billing Statement	48	Audit Rights Report - Assigned to Groups	42
Case Expiration Date		Audit Rights Report - Group Names	44
Practice Treatment Case Report	248	Audit Rights Report - Users to Groups	46
Claim Date		Audit Report - Appointments	26
Insurance Claims Not Sent Report	142	Date of Completed Procedure Walkout - Doctor's Statement	356
Claim Expiration Date		Date of Completed Treatment Referral Recap Report	284
Procedures Not Attached to Insurance Report	258	Date of Last Case Status Update Practice Treatment Case Report	248
Secondary Insurance Claims Not Created Report	306	Patient Treatment Case Report	218
Insurance Claims Not Sent Report	142	Date of Last Payment Agreement Payment Letter Merge Reports	152
Claim On Hold Date		Date of Payment	
Insurance Claim Aging Report	140	Coupon Book - Future Due Payments	78
Claim Payment Received Date			
Insurance Transaction Analysis Report	148		
Claim Re-sent Date			
Insurance Claim Aging Report	140		
Claim Sent Date			
Insurance Transaction Analysis Report	148		
Insurance Claim Aging Report	140		

Date (continued)

Date of Treatment-planned Procedure Referral Slip	286	Last Missed Appointment Date Patient Route Slip	216
Date Signed		Last Payment Agreement Payment Date Patient Route Slip	216
Perio - Exam Comparison Report	232	Last Payment Date Aging/Credit Balance Report	6
Perio - Graphic Chart Report	234	Last Payment Date for Payment Agreement Collections Manager List	70
Perio - Combined Graphic & Data Chart Report	228	Last Prophylaxis Date Patient Route Slip	216
Ending Balance (for Date Range) Practice Analysis Report	242	Last Referral Date Letter Merge Reports	152
Entry Date		Last Referral Name and Date Patient Route Slip	216
Audit Report - Transactions	38	Last Referred By Source and Date Patient Route Slip	216
Day Sheet (Adjustments) Report	90	Last Referred To Name and Date Patient Route Slip	216
Day Sheet (Charges and Receipts) Report	94	Last Statement Date Collections Manager List	70
Day Sheet (Receipts) Report	98	Patient Route Slip	216
Day Sheet Report	100	Aging/Credit Balance Report	6
Insurance Carrier Production - Full Report	136	Last Visit Date Patient List	204
Operator Day Sheet Report	188	Patient Notes Report	208
Patient Health Assessment Report	198	Patient Route Slip	216
Patient List (Filtered)	206	Patient Route Slip	216
Patient Treatment Case Report	218	Letter Merge Reports	152
Practice Treatment Case Report	248	Late Charge Date Late Charge Report	150
Production Summary Report	260	Medication Date Patient List (Filtered)	206
Provider Revenue - Allocations Report	274	New Patients (for Date Range) Practice Analysis Report	242
Provider Revenue - Charges Report	276	Next Appointment Date Patient Route Slip	216
Provider Revenue - Credits Report	278	Next Appointment Procedure Date Patient Route Slip	216
RVU Day Sheet Report	296	Next Continuing Care Appointment Date Patient Route Slip	216
RVU Production Summary Report	298	Letter Merge Reports	152
Suspended Credits Report	312	Next Payment Agreement Payment Due Date Patient Route Slip	216
Audit Report - Combined	32	Next Payment Plan Payment Date Letter Merge Reports	152
Family Member Balance (as of a Date) Patient's Ledger Report	220	Number of Patients Seen During Past 24 Months Meaningful Use Measure Calculation List	156
Finance Charge Date Finance Charge Report	124	Patient Social Security Number or Request Date Audit Report - Patients	34
First Payment Date Payment Agreement Report	224	Patient Social Security Number or Request Date Change Audit Report - Patients	34
First Visit Date		Payment Agreement Date Truth in Lending Disclosure Statement	320
New Patient List	184	Payment Agreement Report	224
Patient List	204	Payment Agreement Last Payment Date Payment Agreement Report	224
Patient Route Slip	216	Payment Agreement Next Payment Date Payment Agreement Report	224
Letter Merge Reports	152	Payment Agreement Payment Due Date Payment Agreement Amortization Schedule	222
Future Appointment Date Patient Route Slip	216		
Future Due Payment Plan Date Future Due Payment Plan Report - Standard	128		
Future Reminder Date Collections Manager List	70		
Immunization Date Patient List (Filtered)	206		
Insurance Eligibility Date Insurance Eligibility Report	146		
Last Eligibility Date for Primary Insurance Coverage Treatment Plan Approval Status Report	318		
Treatment Plan Approval Report	316		
Last Eligibility Date for Secondary Insurance Coverage Treatment Plan Approval Status Report	318		
Treatment Plan Approval Report	316		
Last Gratuity Date Referred By Patient Report	290		
Last Late Charge Date Payment Agreement Report	224		

Date (continued)

Payment Date		Practice Treatment Case Report	248
Patient's Ledger Report	220	Production Summary Report	260
Deposit Slip	108	Provider Revenue - Allocations Report	274
Payment Due Date		Provider Revenue - Charges Report	276
Coupon Book - Payment Agreements	79	Provider Revenue - Credits Report	278
Coupon Book - Future Due Payments	78	RVU Day Sheet Report	296
Perio Exam Date		RVU Production Summary Report	298
Perio - Combined Graphic & Data Chart Report	228	Suspended Credits Report	312
Perio - Data Chart Report	230	Audit Report - Combined	32
Perio - Exam Comparison Report	232	Procedure Date Change	
Perio - Pocket Depths Only Report	236	Audit Report - Transactions	38
Perio Exam List	238	Procedure Date for Date of Service	
Patient Notes Report	208	Letter Merge Reports	152
Prescription Date		Referral Date	
Prescription Printout	250	Referral Slip	286
Patient List (Filtered)	206	Referred By Doctor/Other Report	288
Pre-treatment Estimate Date		Referred By Patient Report	290
Pre-Treatment Estimates Not Sent Report	254	Referred To Doctor Report	292
Pre-treatment Estimate Expiration Date		Referral Recap Report	284
Secondary Pre-Treatment Estimates Not Created	308	Referred By Date	
Pre-Treatment Estimates Not Sent Report	254	New Patient List	184
Pre-treatment Estimate On Hold Date		Referred by Doctor/Other Last Gratuity Date	
Pre-Treatment Estimate Aging Report	252	Referred By Doctor/Other Report	288
Pre-treatment Estimate Re-sent Date		Referred Date of Treatment Still in Progress	
Pre-Treatment Estimate Aging Report	252	Referral Recap Report	284
Pre-treatment Estimate Sent Date		Referred Patients (for Date Range)	
Pre-Treatment Estimate Aging Report	252	Practice Analysis Report	242
Pre-treatment Estimate Tracer Date		Scheduled Date	
Pre-Treatment Estimate Aging Report	252	Referred To Doctor Report	292
Primary Claim Date		Secondary Eligibility Date	
Secondary Insurance Claims Not Created Report	306	Appointment Book View Printout	14
Primary Eligibility Date		Secondary Insurance Benefits Expiration Date for Family	
Appointment Book View Printout	14	Treatment Case Report	314
Primary Insurance Benefits Expiration Date for Family		Secondary Insurance Benefits Expiration Date for Patient	
Treatment Case Report	314	Treatment Case Report	314
Primary Insurance Benefits Expiration Date for Patient		Patient Treatment Case Report	218
Treatment Case Report	314	Secondary Pre-treatment Estimate Sent Date	
Patient Treatment Case Report	218	Treatment Plan Approval Status Report	318
Primary Pre-treatment Estimate Date		Treatment Plan Approval Report	316
Secondary Pre-Treatment Estimates Not Created	308	Service Date	
Report	308	Insurance Claim Aging Report	140
Primary Pre-treatment Estimate Sent Date		RVU Utilization Report	304
Treatment Plan Approval Status Report	318	Treatment Plan Approval Report	316
Treatment Plan Approval Report	316	Treatment Plan Approval Status Report	318
Problem Discovery Date		Utilization Report	354
Patient List (Filtered)	206	Dental Encounters Report	106
Procedure Date		Signature Date	
Audit Report - Transactions	38	Treatment Case Report	314
Billing Statement	48	Subtotal of Charges (for Date Range)	
Day Sheet (Adjustments) Report	90	Practice Analysis Report	242
Day Sheet (Charges and Receipts) Report	94	Total Charges (for Date Range)	
Day Sheet (Receipts) Report	98	Practice Analysis Report	242
Day Sheet Report	100	Total Family Balance (as of a Date)	
Operator Day Sheet Report	188	Family Ledger Report (Single Family)	120
Patient Chart and Progress Notes Printout	194	Family Ledger Report	118
Patient List (Filtered)	206	Total Family Balance as of a Date	
Patient Treatment Case Report	218	Patient's Ledger Report	220
		Total Patient Balance (as of Date)	
		Patient Ledger Report	202
		Total Patient Balance as of a Date	
		Patient's Ledger Report	220

Date (continued)

Transaction Date	
Family Ledger Report	118
Family Ledger Report (Single Family)	120
Insurance Transaction Analysis Report	148
Patient's Ledger Report	220
Credit Card Transaction Report	80
Treatment-planned Procedure Date	
Unscheduled Treatment Plans (Detailed) Report	350
Treatment Case Report	314

Date of Service

Insurance Payment for Date of Service	
Letter Merge Reports	152
Service Date	
Insurance Claim Aging Report	140
RVU Utilization Report	304
Treatment Plan Approval Report	316
Treatment Plan Approval Status Report	318
Utilization Report	354
Dental Encounters Report	106
Total Charge for Date of Service	
Letter Merge Reports	152

Day

Amount for Today's Completed Work	
Patient Chart Printout	196
Day Note	
Appointment Book View Printout	14
Tooth Number for Today's Completed Work	
Patient Chart Printout	196
Total Amount of Charges for Today's Completed Work	
Patient Chart Printout	196

Days

Days Referred Out	
Referred To Doctor Report	292

DEA Number

DEA Number	
Practice Organization List	244
Provider DEA Number	
Prescription Printout	250

Debit

Amount of Debit Initial Balances (Production)	
Provider A/R Totals - Daily Report	264
Amount of Debit Initial Balances (Production) for Prov	
Provider A/R Totals - Standard Report	266
Provider A/R Totals - Daily Report	264
Amount of Debit Initial Balances for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Debit Initial Balances for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Debit Initial Balance	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Debit Special Adjustment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8

Total Amount of Debit Adjustments	
Day Sheet (Adjustments) Report	90
Insurance Carrier Production - Full Report	136
Insurance Carrier Production - Summary Report	138
Adjustment Summary Report	4
Total Amount of Debit Initial Balances	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Debit Initial Balances (Production)	
Provider A/R Totals - Standard Report	266
Provider A/R Totals - Daily Report	264
Total Amount of Debit Special Adjustments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Analysis Summary Report - Daily	8
Total Quantity of Debit Adjustments	
Day Sheet (Adjustments) Report	90

Debit Adjustment

Amount of Debit Adjustments (Average)	
Practice Analysis Report	242
Amount of Debit Adjustments (for Date Range)	
Practice Analysis Report	242
Amount of Debit Adjustments (MTD)	
Practice Analysis Report	242
Amount of Debit Adjustments (YTD)	
Practice Analysis Report	242
Amount of Other Debit Adjustments (Average)	
Practice Analysis Report	242
Amount of Other Debit Adjustments (for Date Range)	
Practice Analysis Report	242
Amount of Other Debit Adjustments (MTD)	
Practice Analysis Report	242
Average Amount of Debit Adjustments	
Day Sheet (Adjustments) Report	90
Debit Adjustment Amount	
Insurance Carrier Production - Full Report	136
Debit Adjustment Amount for Insurance Plan	
Insurance Carrier Production - Summary Report	138
Insurance Carrier Production - Full Report	136
Total Amount of Debit Adjustments	
Day Sheet (Adjustments) Report	90
Insurance Carrier Production - Full Report	136
Insurance Carrier Production - Summary Report	138
Adjustment Summary Report	4
Total Quantity of Debit Adjustments	
Day Sheet (Adjustments) Report	90
Debit Special Adjustment	
Amount of Debit Special Adjustments	
Provider A/R Totals - Daily Report	264
Amount of Debit Special Adjustments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Debit Special Adjustments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100

Debit Special Adjustment (continued)

Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Analysis Summary Report - Daily	8
Debit Special Adjustment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Total Amount of Debit Special Adjustments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Analysis Summary Report - Daily	8

Decay

Number of Patients 0 - 19 Years with Tooth Decay or Cavities	
Clinical Quality Measures List	66
Percent of Patients with History of Decay	
Caries Prevalence and Periodontal Index Report	52
Percent of Patients with Untreated Decay	
Caries Prevalence and Periodontal Index Report	52

Deductible

Amount of Other Deductible Owed by Family to Primary Insurance	
Patient Route Slip	216
Amount of Other Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Amount of Other Deductible Owed to Primary Insurance	
Patient Route Slip	216
Amount of Other Deductible Owed to Secondary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed by Family to Primary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed to Primary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed to Secondary Insurance	
Patient Route Slip	216
Amount of Standard Deductible Owed by Family to Primary Insurance	
Patient Route Slip	216
Amount of Standard Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Amount of Standard Deductible Owed to Primary Insurance	
Patient Route Slip	216
Amount of Standard Deductible Owed to Secondary Insurance	
Patient Route Slip	216

Estimated Amount of Deductibles to Be Applied	
Treatment Case Report	314
Patient Treatment Case Report	218
Lifetime/Individual/Standard Deductible	
Insurance Carrier List	132
Lifetime/Individual/Standard Other Deductible	
Insurance Carrier List	132
Lifetime/Individual/Standard Preventative Deductible	
Insurance Carrier List	132
Other Deductible Met	
Insurance Carrier List	132
Other Deductible Owed by Family to Primary Insurance	
Treatment Case Report	314
Other Deductible Owed by Family to Secondary Insurance	
Treatment Case Report	314
Other Deductible Owed by Patient to Primary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218
Other Deductible Owed by Patient to Secondary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218
Preventative Deductible Met	
Insurance Carrier List	132
Preventative Deductible Owed by Family to Primary Insurance	
Treatment Case Report	314
Preventative Deductible Owed by Family to Secondary Insurance	
Treatment Case Report	314
Preventative Deductible Owed by Patient to Primary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218
Preventative Deductible Owed by Patient to Secondary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218
Standard Deductible Met	
Insurance Carrier List	132
Standard Deductible Owed by Family to Primary Insurance	
Treatment Case Report	314
Standard Deductible Owed by Family to Secondary Insurance	
Treatment Case Report	314
Standard Deductible Owed by Patient to Primary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218
Standard Deductible Owed by Patient to Secondary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218

Deductible Type

Deductible Type	
Standard Coverage Tables Report	310
Insurance Coverage Tables Report	144

Deleted

Deleted Appointment	
Audit Report - Appointments	26
Deleted Entry	
Audit Report - Patients	34

Deleted (continued)

Deleted Procedure	
Audit Report - Combined	32
Deleted Transaction	
Audit Report - Transactions	38

Demographic

Number of Patients with Required Demographics	
Meaningful Use Measure Calculation List	156

Denominator Code

Denominator Codes for Provider	
Oral Health Education Report	192
Periodontal Exam Report	240
Initial Health History Report	130
Total Denominator Codes for All Clinics	
Oral Health Education Report	192
Periodontal Exam Report	240
Initial Health History Report	130
Total Denominator Codes for Clinic	
Oral Health Education Report	192
Periodontal Exam Report	240
Initial Health History Report	130

Dental

Amount of Dental Insurance Portion	
Patient Chart Printout	196
Do not Bill to Dental Insurance	
Insurance Carrier List	132
Do not Bill to Dental Insurance if 0% Coverage	
Insurance Carrier List	132
Number of Patients with Dental and Medical Insurance	
Practice Statistics Report	246
Number of Patients with Primary Dental Insurance Only	
Practice Statistics Report	246
Number of Patients with Secondary Dental Insurance	
Practice Statistics Report	246
Number of Patients without Dental and Medical Insurance	
Practice Statistics Report	246
Number of Patients without Dental Insurance	
Practice Statistics Report	246
Percent of Patients with Dental and Medical Insurance	
Practice Statistics Report	246
Percent of Patients with Primary Dental Insurance Only	
Practice Statistics Report	246
Percent of Patients with Secondary Dental Insurance	
Practice Statistics Report	246
Percent of Patients without Dental and Medical Insurance	
Practice Statistics Report	246
Percent of Patients without Dental Insurance	
Practice Statistics Report	246
Primary Dental Insurance Carrier Name	
Patient List	204
Secondary Dental Insurance Carrier Name	
Patient List	204
Total Amount of Dental Insurance Portions	
Patient Chart Printout	196

Dental Chart

Dental Chart	
Patient Chart Printout	196
Patient Chart and Progress Notes Printout	194

Graphical Chart	
Treatment Case Report	314

Dental Diagnostic Code

Dental Diagnostic Code	
Multi-Code List	182
Procedure Code List	256
Dental Diagnostic Code List	104
Dental Diagnostic Code Description	
Dental Diagnostic Code List	104
Do not Print Dental Diagnostic Codes on Claim	
Insurance Carrier List	132

Dental Fluorosis

Percent of Patients with Dental Fluorosis	
Caries Prevalence and Periodontal Index Report	52

Dentition

Permanent/Temporary	
Multi-Code List	182

Deposit

Paid in by Name	
Deposit Slip	108
Total Amount of Deposit	
Deposit Slip	108

Description

ADA Code	
Day Sheet (Charges and Receipts) Report	94
Dental Encounters Report	106
Fee Schedules Report	122
Insurance Carrier Production - Full Report	136
Multi-Code List	182
Operator Day Sheet Report	188
Patient Chart and Progress Notes Printout	194
Patient List (Filtered)	206
Patient Treatment Case Report	218
Practice Treatment Case Report	248
Procedure Code List	256
Procedures Not Attached to Insurance Report	258
Production Summary Report	260
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Provider Revenue - Allocations Report	274
Provider Revenue - Charges Report	276
Provider Revenue - Credits Report	278
RVU Day Sheet Report	296
RVU Production Summary Report	298
RVU Schedules Report	302
RVU Utilization Report	304
Standard Coverage Tables Report	310
Treatment Case Report	314
Treatment Plan Approval Report	316
Treatment Plan Approval Status Report	318
Unscheduled Treatment Plans (Detailed) Report	350
Updated Dental Insurance Payment Table Report	352
Utilization Report	354
Walkout - Doctor's Statement	356
Appointment Cycle Time Report	16
ADA Code Abbreviated Description	
Procedure Code List	256
Multi-Code List	182

Description (continued)

ADA Code Description		Medication Description	
Fee Schedules Report	122	Patient List (Filtered)	206
Insurance Carrier Production - Full Report	136	Modifier Code Description	
Multi-Code List	182	Medical Code List	180
Patient Chart and Progress Notes Printout	194	Multi-Code Description	
Patient Ledger Report	202	Multi-Code List	182
Patient Treatment Case Report	218	Next Appointment ADA Code Description	
Practice Treatment Case Report	248	Patient Route Slip	216
Procedure Code List	256	Payment Description	
Procedures Not Attached to Insurance Report	258	Patient's Ledger Report	220
Production Summary Report	260	Payment Type Description	
Provider A/R Totals - Daily Report	264	Payment Summary Report	226
Provider A/R Totals - Standard Report	266	Place of Service Code Description	
Provider Revenue - Allocations Report	274	Medical Code List	180
Provider Revenue - Charges Report	276	Problem Description	
Provider Revenue - Credits Report	278	Patient List (Filtered)	206
RVU Day Sheet Report	296	Procedure Description	
RVU Production Summary Report	298	Day Sheet Report	100
RVU Schedules Report	302	Audit Report - Combined	32
RVU Utilization Report	304	Transaction Description	
Treatment Case Report	314	Family Ledger Report	118
Treatment Plan Approval Report	316	Family Ledger Report (Single Family)	120
Treatment Plan Approval Status Report	318	Insurance Transaction Analysis Report	148
Unscheduled Treatment Plans (Detailed) Report	350	Patient's Ledger Report	220
Utilization Report	354	Provider Revenue - Allocations Report	274
Walkout - Doctor's Statement	356	Provider Revenue - Charges Report	276
Walkout - Family Walkout	358	Provider Revenue - Credits Report	278
Day Sheet (Charges and Receipts) Report	94	Suspended Credits Report	312
ADA Code Description for Today's Completed Work		Audit Report - Transactions	38
Patient Chart Printout	196	Transaction Description Change	
ADA Code Description for Treatment-planned Procedure		Audit Report - Transactions	38
Patient Chart Printout	196	Type of Service Code Description	
ADA Code Description of Completed Treatment		Medical Code List	180
Referral Recap Report	284	Vaccine Abbreviated Description	
ADA Code Description of Treatment Still in Progress		Patient List (Filtered)	206
Referral Recap Report	284	Diagnostic Code	
ADA Code Description of Treatment-planned Procedure		Dental Diagnostic Code	
Referral Slip	286	Multi-Code List	182
ADA Code Description or Transaction Description		Procedure Code List	256
Operator Day Sheet Report	188	Dental Diagnostic Code List	104
Adjustment Description		Dental Diagnostic Code Description	
Patient's Ledger Report	220	Dental Diagnostic Code List	104
Allergy Description		Do not Print Dental Diagnostic Codes on Claim	
Patient List (Filtered)	206	Insurance Carrier List	132
AMA CPT Code Description		Diagnostic Imaging	
Medical Code List	180	Number of Diagnostic Imaging Orders Recorded Using CPOE (Computerized Provider Order Entry)	
Continuing Care Type Description		Meaningful Use Measure Calculation List	156
Letter Merge Reports	152	Disabled	
Dental Diagnostic Code Description		Disabled/Enabled	
Dental Diagnostic Code List	104	Multi-Code List	182
Description of Service		Discount	
Billing Statement	48	Amount of Sliding Discounts for Patient	
Document Description		UDS - Patient Related Revenue Report	336
Document Center List	114	Subtotal of Sliding Discounts for Financial Class Type	
ICD-9-CM Code Description		UDS - Patient Related Revenue Report	336
Medical Code List	180	Subtotal of Sliding Discounts for Payer Category	
		UDS - Patient Related Revenue Report	336
		Total Amount of Sliding Discounts for Financial Class Type	
		UDS - Patient Related Revenue Report	336

Discount (continued)

Total Amount of Sliding Discounts for Patient	
UDS - Patient Related Revenue Report	336
Total Amount of Sliding Discounts for Payer Category	
UDS - Patient Related Revenue Report	336

Dispense

Dispense as Written	
Prescription Printout	250

Divorced

Number of Divorced Patients	
Practice Statistics Report	246
Percent of Divorced Patients	
Practice Statistics Report	246

dmfs

dmfs	
Caries Prevalence and Periodontal Index Report	52
Mean dmfs	
Caries Prevalence and Periodontal Index Report	52
Percent of Patients with dmfs > 0	
Caries Prevalence and Periodontal Index Report	52

DMFT

Mean DMFT	
Caries Prevalence and Periodontal Index Report	52

dmft

dmft	
Caries Prevalence and Periodontal Index Report	52
Mean dmft	
Caries Prevalence and Periodontal Index Report	52

Do not Bill

Do not Bill to Dental Insurance	
Insurance Carrier List	132
Do not Bill to Dental Insurance if 0% Coverage	
Insurance Carrier List	132

Do not Print

Do not Print Dental Diagnostic Codes on Claim	
Insurance Carrier List	132

Doctor

Referred to Doctor Name	
Referred To Doctor Report	292
Document Center Document	112
Referred to Doctor Phone Number	
Referred To Doctor Report	292

Doctor/Other

Number of Referred by Doctor/Other Patients Listed	
Referred By Doctor/Other Report	288
Referred by Doctor/Other Address	
Referred By Doctor/Other Report	288
Referred by Doctor/Other Gratuity Given	
Referred By Doctor/Other Report	288
Referred by Doctor/Other Last Gratuity Date	
Referred By Doctor/Other Report	288
Referred by Doctor/Other Name	
Referred By Doctor/Other Report	288
Document Center Document	112

Referred by Doctor/Other Phone Number	
Referred By Doctor/Other Report	288
Referred by Doctor/Other Total Referrals	
Referred By Doctor/Other Report	288
Total Number of Referred by Doctor/Other Patients Listed	
Referred By Doctor/Other Report	288
Total Number of Referred by Doctor/Other Referrals	
Referred By Doctor/Other Report	288

Document

Document	
Document Center Document	112
Document Description	
Document Center List	114
Document Type	
Document Center List	114

Document Center

Date Attached	
Document Center List	114
Number of Pages	
Document Center List	114

Document Type

Document Type	
Document Center List	114

Download

Number of Patients who Viewed or Downloaded or Transmitted (VDT) Electronic Health Information Meaningful Use Measure Calculation List	156
--	-----

Driver's License Number

Patient Driver's License Number	
Patient Questionnaire	214
Patient List	204
Spouse Drivers License Number	
Patient Questionnaire	214

Drug

Drug Name	
Patient List (Filtered)	206

Drug ID

Provider Drug ID	
Provider IDs List	272

Due

Amount Due for Payment Agreement	
Collections Manager List	70
Amount of Future Due Payment Agreements	
Practice Analysis Report	242
Balance Due	
Coupon Book - Payment Agreements	79
Coupon Book - Future Due Payments	78
Next Payment Agreement Payment Due Amount	
Patient Route Slip	216
Number of Patients Due for Propy (on Month and Year)	
Practice Statistics Report	246
Payment Amount Due	
Coupon Book - Payment Agreements	79
Coupon Book - Future Due Payments	78
Percent of Patients Due for Propy (Month and Year)	
Practice Statistics Report	246
Total Amount Due for Payment Agreements	
Collections Manager List	70
Total Amount of Payment Agreement Payments Due	
Payment Agreement Report	224

Due Date

Continuing Care Due Date	
Letter Merge Reports	152
Patient List (Filtered)	206
Continuing Care Display List	76
Continuing Care Due Dates	
Patient Route Slip	216
Continuing Care Note Continuing Care Due Date	
Patient Notes Report	208
Next Payment Agreement Payment Due Date	
Patient Route Slip	216
Payment Agreement Payment Due Date	
Payment Agreement Amortization Schedule	222
Payment Due Date	
Coupon Book - Payment Agreements	79
Coupon Book - Future Due Payments	78

Electronic Exchange

Number of TCs (Transition of Care) and Referrals where SCs (Summary of Care) Was Exchanged Electronically	
Meaningful Use Measure Calculation List	156

Electronic Health Information

Number of Patients Provided API Access to Electronic Health Information	
Meaningful Use Measure Calculation List	156
Number of Patients Provided Timely Online Access to Electronic Health Information	
Meaningful Use Measure Calculation List	156
Number of Patients who Accessed Electronic Health Information with API	
Meaningful Use Measure Calculation List	156
Number of Patients who Viewed or Downloaded or Transmitted (VDT) Electronic Health Information	
Meaningful Use Measure Calculation List	156

Electronic Prescription

Number of Electronic Prescriptions	
Meaningful Use Measure Calculation List	156
Number of Patients with Electronic Prescriptions	
Meaningful Use Measure Calculation List	156

Electronic Summary of Care

Number of TCs (Transition of Care) and Referrals where Electronic SCs (Summary of Care) Provided	
Meaningful Use Measure Calculation List	156

Eligibility

Insurance Eligibility Date	
Insurance Eligibility Report	146
Last Eligibility Date for Primary Insurance Coverage	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Last Eligibility Date for Secondary Insurance Coverage	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Number of Patients Eligible for Prophy Continuing Care Practice Statistics Report	246
Percent of Patients Eligible for Prophy Continuing Care Practice Statistics Report	246
Primary Eligibility Date	
Appointment Book View Printout	14
Secondary Eligibility Date	
Appointment Book View Printout	14

Email

Email Address	
Collections Manager List	70

Patient Email Address	
Patient Questionnaire	214
Patient List	204
Spouse Email Address	
Patient Questionnaire	214

Employee

Number of Employees	
Employers and Employed Patients Report	116

Employer

Employer Address	
Letter Merge Reports	152
Employers and Employed Patients Report	116
Employer Address (for Guarantor)	
Patient Questionnaire	214
Employer Address (for Patient)	
Patient Questionnaire	214
Employer Name	
Employers and Employed Patients Report	116
Letter Merge Reports	152
Patient Route Slip	216
Document Center Document	112
Employer Name (for Guarantor)	
Patient Questionnaire	214
Employer Name (for Patient)	
Patient Questionnaire	214
Employer Phone Number	
Letter Merge Reports	152
Employers and Employed Patients Report	116
Guarantor Employer	
Patient Route Slip	216
Insurance Plan Employer	
Insurance Carrier List	132
Insurance Plan Employer Name	
Walkout - Doctor's Statement	356
Provider IDs List	272
Patient Employer	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Patient Employer Name	
Insurance Carrier List	132
Primary Insurance Carrier Plan Employer	
Patient Route Slip	216
Secondary Insurance Carrier Plan Employer	
Patient Route Slip	216
Subscriber Employer Name	
Insurance Carrier List	132
Subscriber's Employer Address for Primary Insurance	
Patient Questionnaire	214
Subscriber's Employer Address for Secondary Insurance	
Patient Questionnaire	214
Subscriber's Employer Name for Primary Insurance	
Patient Questionnaire	214
Subscriber's Employer Name for Secondary Insurance	
Patient Questionnaire	214

EMR Number

Patient EMR Number	
UDS - Insurance Financial Class Report	330
UDS - Insurance Financial Class Report (2013)	332
UDS - Medicaid/Medicare Report	334
UDS - Patient Status Report	338
UDS - Sealant Statistics Report	340
UDS - Tobacco Use and Intervention Report	342

EMR Number (continued)

UDS - Age/Gender Report 322

Enabled

Disabled/Enabled
Multi-Code List 182

Enclosed

Amount Enclosed
Coupon Book - Future Due Payments 78
Coupon Book - Payment Agreements 79
Billing Statement 48

Encounter

Encounter Number
Audit Report - Transactions 38
Clinical Notes Report 64
Operator Day Sheet Report 188
Audit Report - Combined 32
Encounter Number Change
Audit Report - Transactions 38
Number of Encounters
UDS - Encounters and Users by Selected Procedure Codes Report 326
Number of Encounters for Primary Providers
UDS - Encounters by Provider Report 328
Number of Encounters for Secondary Providers
UDS - Encounters by Provider Report 328
Number of New-patient Encounters
Meaningful Use Measure Calculation List 156
Total Number of Encounters
Operator Day Sheet Report 188
Total Number of Unique Encounters
Operator Day Sheet Report 188

Ending Balance

Amount of Ending Balances for Clinic
Analysis Summary Report - Standard 12
Analysis Summary Report - Daily 8
Amount of Ending Balances for Provider
Analysis Summary Report - Standard 12
Analysis Summary Report - Daily 8
Ending Balance
Analysis Summary Report - Standard 12
Provider A/R Totals - Daily Report 264
Analysis Summary Report - Daily 8
Ending Balance (Average)
Practice Analysis Report 242
Ending Balance (for Date Range)
Practice Analysis Report 242
Ending Balance (MTD)
Practice Analysis Report 242
Ending Balance (YTD)
Practice Analysis Report 242
Ending Balance for Provider
Provider A/R Totals - Standard Report 266
Provider A/R Totals - Daily Report 264
Total Amount of Ending Balances
Analysis Summary Report - Standard 12
Provider A/R Totals - Daily Report 264
Provider A/R Totals - Standard Report 266
Analysis Summary Report - Daily 8

Entry

Deleted Entry
Audit Report - Patients 34

Initial Entry
Audit Report - Patients 34
Office Journal Entry
Office Journal Report 186
Office Journal Entry Date
Office Journal Report 186
Office Journal Entry Information
Office Journal Report 186
Office Journal Entry Time
Office Journal Report 186
Previous Office Journal Entry
Collections Manager List 70

Entry Date

Entry Date
Audit Report - Transactions 38
Day Sheet (Adjustments) Report 90
Day Sheet (Charges and Receipts) Report 94
Day Sheet (Receipts) Report 98
Day Sheet Report 100
Insurance Carrier Production - Full Report 136
Operator Day Sheet Report 188
Patient Health Assessment Report 198
Patient List (Filtered) 206
Patient Treatment Case Report 218
Practice Treatment Case Report 248
Production Summary Report 260
Provider Revenue - Allocations Report 274
Provider Revenue - Charges Report 276
Provider Revenue - Credits Report 278
RVU Day Sheet Report 296
RVU Production Summary Report 298
Suspended Credits Report 312
Audit Report - Combined 32
Office Journal Entry Date
Office Journal Report 186

Estimate

Account Estimated Insurance Portion
Patient Route Slip 216
Amount of Estimated Insurance Portion
Insurance Claim Aging Report 140
Amount of Estimated Primary Insurance Benefits Remaining YTD for Family
Treatment Case Report 314
Amount of Estimated Primary Insurance Benefits Remaining YTD for Patient
Treatment Case Report 314
Patient Treatment Case Report 218
Amount of Estimated Secondary Insurance Benefits Remaining YTD for Family
Treatment Case Report 314
Amount of Estimated Secondary Insurance Benefits Remaining YTD for Patient
Treatment Case Report 314
Patient Treatment Case Report 218
Amount of Insurance Estimate
Billing Statement 48
Amount of Insurance Estimates
Aging/Credit Balance Report 6
Amount of Pending Estimated Primary Insurance Portions YTD for Family
Treatment Case Report 314

Estimate (continued)

Amount of Pending Estimated Primary Insurance Portions YTD for Patient		Pre-treatment Estimate On Hold Date	
Treatment Case Report	314	Pre-Treatment Estimate Aging Report	252
Patient Treatment Case Report	218	Pre-treatment Estimate Re-sent Date	
Amount of Pending Estimated Secondary Insurance Portions YTD for Family		Pre-Treatment Estimate Aging Report	252
Treatment Case Report	314	Pre-treatment Estimate Sent Date	
Amount of Pending Estimated Secondary Insurance Portions YTD for Patient		Pre-Treatment Estimate Aging Report	252
Treatment Case Report	314	Pre-treatment Estimate Tracer Date	
Patient Treatment Case Report	218	Pre-Treatment Estimate Aging Report	252
Estimated Amount of Deductibles to Be Applied		Primary Insurance Estimated Amount	
Treatment Case Report	314	Treatment Plan Approval Status Report	318
Patient Treatment Case Report	218	Treatment Plan Approval Report	316
Estimated Amount of Insurance Payments		Primary Pre-treatment Estimate Date	
Treatment Case Report	314	Secondary Pre-Treatment Estimates Not Created Report	308
Patient Treatment Case Report	218	Primary Pre-treatment Estimate Sent Date	
Estimated Amount of Patient's Portion		Treatment Plan Approval Status Report	318
Patient Treatment Case Report	218	Treatment Plan Approval Report	316
Treatment Case Report	314	Secondary Insurance Estimated Amount	
Patient Proposed Treatment Case Report (Your Care Plan)	212	Treatment Plan Approval Status Report	318
Estimated Guarantor Portion		Treatment Plan Approval Report	316
Patient Route Slip	216	Secondary Pre-treatment Estimate Sent Date	
Estimated Insurance Portion		Treatment Plan Approval Status Report	318
Patient Proposed Treatment Case Report (Your Care Plan)	212	Treatment Plan Approval Report	316
Dental Encounters Report	106	Total Amount for Primary Pre-treatment Estimates	
Estimated Patient Portion		Pre-Treatment Estimate Aging Report	252
Patient Route Slip	216	Total Amount for Secondary Pre-treatment Estimates	
Guarantor Estimate Amount		Pre-Treatment Estimate Aging Report	252
Collections Manager List	70	Total Amount of Account Balances Aged 1 - 30 for Pre-treatment Estimates	
Insurance Estimate Amount		Pre-Treatment Estimate Aging Report	252
Collections Manager List	70	Total Amount of Account Balances Aged 1 - 30 for Primary Pre-treatment Estimates	
Insurance Estimated Amount		Pre-Treatment Estimate Aging Report	252
Walkout - Family Walkout	358	Total Amount of Account Balances Aged 121 - 150 for Pre-treatment Estimates	
Outstanding Primary Insurance Estimated Amount		Pre-Treatment Estimate Aging Report	252
Treatment Plan Approval Status Report	318	Total Amount of Account Balances Aged 121 - 150 for Primary Pre-treatment Estimates	
Treatment Plan Approval Report	316	Pre-Treatment Estimate Aging Report	252
Outstanding Secondary Insurance Estimated Amount		Total Amount of Account Balances Aged 121 - 150 for Secondary Pre-treatment Estimates	
Treatment Plan Approval Status Report	318	Pre-Treatment Estimate Aging Report	252
Treatment Plan Approval Report	316	Total Amount of Account Balances Aged 151 - 180 for Pre-treatment Estimates	
Patient Estimated Insurance Portion		Pre-Treatment Estimate Aging Report	252
Patient Route Slip	216	Total Amount of Account Balances Aged 151 - 180 for Primary Pre-treatment Estimates	
Percent of Insurance Estimate Amounts		Pre-Treatment Estimate Aging Report	252
Aging/Credit Balance Report	6	Total Amount of Account Balances Aged 151 - 180 for Secondary Pre-treatment Estimates	
Pre-treatment Estimate Amount		Pre-Treatment Estimate Aging Report	252
Patient Route Slip	216	Total Amount of Account Balances Aged 181+ for Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Pre-Treatment Estimates Not Sent Report	254	Total Amount of Account Balances Aged 181+ for Primary Pre-treatment Estimates	
Secondary Pre-Treatment Estimates Not Created Report	308	Pre-Treatment Estimate Aging Report	252
Insurance Transaction Analysis Report	148	Pre-Treatment Estimate Aging Report	252
Pre-treatment Estimate Date			
Pre-Treatment Estimates Not Sent Report	254		
Pre-treatment Estimate Expiration Date			
Secondary Pre-Treatment Estimates Not Created Report	308		
Pre-Treatment Estimates Not Sent Report	254		

Estimate (continued)

Total Amount of Account Balances Aged 181+ for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 31 - 60 for Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 31 - 60 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 31 - 60 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 61 - 90 for Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 61 - 90 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 61 - 90 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 91 - 120 for Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 91 - 120 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 91 - 120 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances with Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances with Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances with Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Estimated Insurance Portion for Primary and Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Estimated Insurance Portion for Primary Claims	
Insurance Claim Aging Report	140
Total Amount of Estimated Insurance Portion for Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Guarantor Estimates	
Collections Manager List	70
Total Amount of Insurance Estimates	
Collections Manager List	70
Aging/Credit Balance Report	6
Total Amount of Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Pre-treatment Estimates not Sent	
Pre-Treatment Estimates Not Sent Report	254
Total Amount of Primary Pre-treatment Estimates not Sent	
Pre-Treatment Estimates Not Sent Report	254

Total Amount of Secondary Pre-treatment Estimates not Created	
Secondary Pre-Treatment Estimates Not Created Report	308
Total Estimated Amount of Patient's Portion	
Patient Proposed Treatment Case Report (Your Care Plan)	212
Total Estimated Insurance Portion	
Patient Proposed Treatment Case Report (Your Care Plan)	212
Ethnicity	
Ethnicity	
UDS - Patient Status Report	338
Patient Ethnicity	
Patient List (Filtered)	206

Exam

Perio Exam Comparison Data Chart	
Perio - Combined Graphic & Data Chart Report	228
Perio Exam Comparison Graphic Chart	
Perio - Combined Graphic & Data Chart Report	228
Perio Exam Date	
Perio - Combined Graphic & Data Chart Report	228
Perio - Data Chart Report	230
Perio - Exam Comparison Report	232
Perio - Pocket Depths Only Report	236
Perio Exam List	238
Patient Notes Report	208
Perio Exam Graphic Chart	
Perio - Combined Graphic & Data Chart Report	228
Perio Exam Note	
Patient Notes Report	208
Perio Exam Provider Name	
Perio - Data Chart Report	230
Perio - Pocket Depths Only Report	236
Perio - Combined Graphic & Data Chart Report	228

Expense

Amount of Lab Expenses for Clinic	
RVU Day Sheet Report	296
Amount of Lab Expenses for Medicaid Procedures for Clinic	
RVU Production Summary Report	298
Amount of Lab Expenses for Medicaid Procedures for Provider	
RVU Production Summary Report	298
Amount of Lab Expenses for Provider	
RVU Day Sheet Report	296
Amount of Lab Expenses of Non-Medicaid Procedures for Clinic	
RVU Production Summary Report	298
Amount of Lab Expenses of Non-Medicaid Procedures for Provider	
RVU Production Summary Report	298
Amount of Lab Expenses of Procedures for Clinic	
RVU Production Summary Report	298
Amount of Lab Expenses of Procedures for Provider	
RVU Production Summary Report	298

Expense (continued)

Lab Expense	
RVU Schedules Report	302
Fee Schedules Report	122
Lab Expense Amount	
RVU Day Sheet Report	296
Total Amount of Lab Expenses	
RVU Day Sheet Report	296
Total Amount of Lab Expenses of Medicaid Procedures	
RVU Production Summary Report	298
Total Amount of Lab Expenses of Non-Medicaid Procedures	
RVU Production Summary Report	298
Total Amount of Lab Expenses of Procedures	
RVU Production Summary Report	298

Expiration Date

Case Expiration Date	
Practice Treatment Case Report	248
Claim Expiration Date	
Procedures Not Attached to Insurance Report	258
Secondary Insurance Claims Not Created Report	306
Insurance Claims Not Sent Report	142
Pre-treatment Estimate Expiration Date	
Secondary Pre-Treatment Estimates Not Created Report	308
Pre-Treatment Estimates Not Sent Report	254
Primary Insurance Benefits Expiration Date for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Secondary Insurance Benefits Expiration Date for Family	
Treatment Case Report	314
Secondary Insurance Benefits Expiration Date for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218

Export

Exported Patient Health Information	
Audit Report - Combined	32

Extension

Guarantor Work Phone Number & Extension	
Collections Manager List	70
Patient Work Phone Extension	
Patient Ledger Report	202
Patient Questionnaire	214
Letter Merge Reports	152
Practice Phone Extension	
Letter Merge Reports	152
Spouse Work Phone Extension	
Patient Questionnaire	214

ExtID

Patient Ext ID	
Patient List (Filtered)	206

Facial

Clinical Attachment Level (Facial)	
Perio - Exam Comparison Report	232
Perio - Combined Graphic & Data Chart Report	228

Furcation Involvement (Facial)	
Perio - Exam Comparison Report	232
Perio - Combined Graphic & Data Chart Report	228
Gingival Margin (Facial)	
Perio - Exam Comparison Report	232
Perio - Combined Graphic & Data Chart Report	228
Mobility (Facial)	
Perio - Exam Comparison Report	232
Perio - Combined Graphic & Data Chart Report	228
Probing Depth (Facial)	
Perio - Data Chart Report	230
Perio - Exam Comparison Report	232
Perio - Pocket Depths Only Report	236
Perio - Combined Graphic & Data Chart Report	228

Family

Amount of Annual Primary Insurance Plan Benefits for Family	
Treatment Case Report	314
Amount of Annual Secondary Insurance Plan Benefits for Family	
Treatment Case Report	314
Amount of Estimated Primary Insurance Benefits Remaining YTD for Family	
Treatment Case Report	314
Amount of Estimated Secondary Insurance Benefits Remaining YTD for Family	
Treatment Case Report	314
Amount of Other Deductible Owed by Family to Primary Insurance	
Patient Route Slip	216
Amount of Other Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Amount of Pending Estimated Primary Insurance Portions YTD for Family	
Treatment Case Report	314
Amount of Pending Estimated Secondary Insurance Portions YTD for Family	
Treatment Case Report	314
Amount of Preventative Deductible Owed by Family to Primary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Amount of Primary Insurance Paid Benefits YTD for Family	
Treatment Case Report	314
Amount of Secondary Paid Benefits for Family	
Treatment Case Report	314
Amount of Standard Deductible Owed by Family to Primary Insurance	
Patient Route Slip	216
Amount of Standard Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Family Alert Note	
Patient Notes Report	208

Family (continued)

Family Balance	
Treatment Case Report	314
Patient Treatment Case Report	218
Family Benefits	
Insurance Carrier List	132
Number of Families	
Practice Analysis Report	242
Other Deductible Owed by Family to Primary Insurance	
Treatment Case Report	314
Other Deductible Owed by Family to Secondary Insurance	
Treatment Case Report	314
Preventative Deductible Owed by Family to Primary Ins	
Treatment Case Report	314
Preventative Deductible Owed by Family to Secondary Ins	
Treatment Case Report	314
Primary Insurance Benefits Expiration Date for Family	
Treatment Case Report	314
Secondary Insurance Benefits Expiration Date for Family	
Treatment Case Report	314
Standard Deductible Owed by Family to Primary Insurance	
Treatment Case Report	314
Standard Deductible Owed by Family to Secondary Insurance	
Treatment Case Report	314
Total Amount of YTD Finance Charges for Family	
Family Ledger Report (Single Family)	120
Total Amount of YTD Insurance Payments for Family	
Family Ledger Report (Single Family)	120
Family Ledger Report	118
Total Amount of YTD Late Charges for Family	
Family Ledger Report (Single Family)	120
Family Ledger Report	118
Total Amount of YTD Payments for Family	
Family Ledger Report (Single Family)	120
Family Ledger Report	118
Total Family Balance (as of a Date)	
Family Ledger Report (Single Family)	120
Family Ledger Report	118
Total Family Balance as of a Date	
Patient's Ledger Report	220
Total YTD Finance Charges for Family	
Family Ledger Report	118
Family Alert	
Family Alert Note	
Patient Notes Report	208
Family Health History	
Number of Patients with Family Health History Recorded	
Meaningful Use Measure Calculation List	156
Family Member	
Family Member Balance (as of a Date)	
Patient's Ledger Report	220
Family Position	
Family Position	
Collections Manager List	70

Fax

Patient Fax Number	
Patient Questionnaire	214
Patient List	204
Spouse Fax Number	
Patient Questionnaire	214

Fee

Amount of Current Charges Compared to Fee Schedule for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Fees - Co-pays for Insurance Carrier	
Utilization Report	354
Amount of Fees for Insurance Carrier	
Utilization Report	354
RVU Utilization Report	304
Case Amount	
Patient Proposed Treatment Case Report (Your Care Plan)	212
Fee	
Practice Treatment Case Report	248
Treatment Case Report	314
Patient Treatment Case Report	218
Fee for Case	
Practice Treatment Case Report	248
Patient Treatment Case Report	218
Fee for Visit	
Practice Treatment Case Report	248
Treatment Case Report	314
Patient Treatment Case Report	218
Fee from Alternate Fee Schedule	
Treatment Case Report	314
Fee from Alternate Fee Schedule for Visit	
Treatment Case Report	314
Fee Schedule	
Fee Schedules Report	122
Net Difference of Current Charges and Fee Schedule for Provider	
Day Sheet (Charges and Receipts) Report	94
Net Difference of Total Current Charges and Fee Schedule	
Day Sheet (Charges and Receipts) Report	94
Procedure Fee	
Utilization Report	354
RVU Utilization Report	304
Total Amount of Current Charges Compared to Fee Schedule	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Fees	
Utilization Report	354
RVU Utilization Report	304
Total Amount of Fees - Co-pays	
Utilization Report	354
Total Amount of Fees - RVU	
RVU Utilization Report	304
Total Case Amount	
Patient Proposed Treatment Case Report (Your Care Plan)	212
Total Fee for Case	
Treatment Case Report	314
Total Fee from Alternate Fee Schedule for Case	
Treatment Case Report	314

Fee Schedule

Amount of Current Charges Compared to Fee Schedule for Provider	
Day Sheet (Charges and Receipts) Report	94
Fee from Alternate Fee Schedule	
Treatment Case Report	314
Fee from Alternate Fee Schedule for Visit	
Treatment Case Report	314
Fee Schedule	
Fee Schedules Report	122
Net Difference of Current Charges and Fee Schedule for Provider	
Day Sheet (Charges and Receipts) Report	94
Net Difference of Total Current Charges and Fee Schedule	
Day Sheet (Charges and Receipts) Report	94
Provider Fee Schedule	
Practice Organization List	244
Provider IDs List	272
Audit Report - Providers/Staff	36
Provider Fee Schedule Change	
Audit Report - Providers/Staff	36
Total Amount of Current Charges Compared to Fee Schedule	
Day Sheet (Charges and Receipts) Report	94
Fee Insurance Carrier	
Amount of Fees - RVU for Insurance Carrier	
RVU Utilization Report	304
Female	
Number of Female Patients	
Practice Statistics Report	246
Number of Females	
UDS - Age/Gender Report	322
Number of Females for Clinic	
UDS - Age/Gender Report	322
Number of Females for Provider	
UDS - Age/Gender Report	322
Percent of Female Patients	
Practice Statistics Report	246
Total Number of Females	
UDS - Age/Gender Report	322
Finance Charge	
Amount of Current Finance Charges for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Finance Charges	
Provider A/R Totals - Daily Report	264
Amount of Finance Charges (Average)	
Practice Analysis Report	242
Amount of Finance Charges (for Date Range)	
Practice Analysis Report	242
Amount of Finance Charges (MTD)	
Practice Analysis Report	242
Amount of Finance Charges (YTD)	
Practice Analysis Report	242
Amount of Finance Charges for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Finance Charge Report	124
Analysis Summary Report - Daily	8
Amount of Finance Charges for Previous Month for Provider	
Day Sheet (Charges and Receipts) Report	94

Amount of Finance Charges for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Finance Charge Report	124
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Analysis Summary Report - Daily	8
Amount of Finance Charges YTD	
Walkout - Family Walkout	358
Amount of MTD Finance Charges for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of YTD Finance Charges for Provider	
Day Sheet (Charges and Receipts) Report	94
Average Amount of Finance Charges	
Day Sheet (Adjustments) Report	90
Finance Charge Amount	
Analysis Summary Report - Daily	8
Analysis Summary Report - Standard	12
Finance Charge Report	124
Adjustment Summary Report	4
Finance Charge Date	
Finance Charge Report	124
Finance Charge Percent	
Payment Agreement Report	224
Total Amount of Current Finance Charges	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Finance Charges	
Analysis Summary Report - Daily	8
Analysis Summary Report - Standard	12
Day Sheet (Adjustments) Report	90
Day Sheet Report	100
Finance Charge Report	124
Operator Day Sheet Report	188
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Truth in Lending Disclosure Statement	320
Adjustment Summary Report	4
Total Amount of Finance Charges for Previous Month	
Day Sheet (Charges and Receipts) Report	94
Total Amount of MTD Finance Charges	
Day Sheet (Charges and Receipts) Report	94
Total Amount of YTD Finance Charges	
Day Sheet (Charges and Receipts) Report	94
Total Amount of YTD Finance Charges for Family	
Family Ledger Report (Single Family)	120
Total Quantity of Finance Charges	
Day Sheet (Adjustments) Report	90
Total YTD Finance Charges for Family	
Family Ledger Report	118
Finance Status	
Case Finance Status	
Practice Treatment Case Report	248
Treatment Case Report	314
Patient Treatment Case Report	218
Financed	
Amount Financed	
Truth in Lending Disclosure Statement	320
Financial Class	
20+ Years Old for Financial Class Type	
UDS - Insurance Financial Class Report	330
20+ Years Old for Financial Class Type for Clinic	
UDS - Insurance Financial Class Report	330

Financial Class (continued)

20+ Years Old for Financial Class Type for Provider	
UDS - Insurance Financial Class Report	330
20+ Years Old for Financial Class Types	
UDS - Insurance Financial Class Report	330
Financial Class	
UDS - Insurance Financial Class Report (2013)	332
UDS - Medicaid/Medicare Report	334
UDS - Patient Status Report	338
Insurance Carrier List	132
Number <19 Years Old for Financial Class Type	
UDS - Insurance Financial Class Report	330
Number <19 Years Old for Financial Class Type for Clinic	
UDS - Insurance Financial Class Report	330
Number <19 Years Old for Financial Class Type for Provider	
UDS - Insurance Financial Class Report	330
Number 0 - 17 Years Old for Financial Class Type	
UDS - Insurance Financial Class Report (2013)	332
Number 18+ for Financial Class Type	
UDS - Insurance Financial Class Report (2013)	332
Number of Medicaid and Medicare Patients in First Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in Second Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in First Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in Second Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in First Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in Second Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Users for Financial Class Type	
UDS - Insurance Financial Class Report	330
Number of Users for Financial Class Type for Clinic	
UDS - Insurance Financial Class Report	330
Number of Users for Financial Class Type for Provider	
UDS - Insurance Financial Class Report	330
Total Number <19 Years Old for Financial Class Types	
UDS - Insurance Financial Class Report	330
Total Number for Financial Class Type	
UDS - Insurance Financial Class Report (2013)	332
Total Number of Users for Financial Class Types	
UDS - Insurance Financial Class Report	330

Financial Class Type

20+ Years Old for Financial Class Type	
UDS - Insurance Financial Class Report	330
20+ Years Old for Financial Class Type for Clinic	
UDS - Insurance Financial Class Report	330
20+ Years Old for Financial Class Type for Provider	
UDS - Insurance Financial Class Report	330
20+ Years Old for Financial Class Types	
UDS - Insurance Financial Class Report	330
Financial Class Type	
UDS - Patient Related Revenue Report	336
UDS - Insurance Financial Class Report	330
Subtotal of Allowances for Financial Class Type	
UDS - Patient Related Revenue Report	336
Subtotal of Amount Collected for Financial Class Type	
UDS - Patient Related Revenue Report	336
Subtotal of Bad Debt Write-offs for Financial Class Type	
UDS - Patient Related Revenue Report	336
Subtotal of Charges for Financial Class Type	
UDS - Patient Related Revenue Report	336
Subtotal of Other Retroactive Payment Amount Collected for Financial Class Type	
UDS - Patient Related Revenue Report	336
Subtotal of Penalty or Payback Amount Collected for Financial Class Type	
UDS - Patient Related Revenue Report	336
Subtotal of Sliding Discounts for Financial Class Type	
UDS - Patient Related Revenue Report	336
Subtotal of Wrap Around or Reconciliation Amount Collected for Financial Class Type (Current Year)	
UDS - Patient Related Revenue Report	336
Subtotal of Wrap Around or Reconciliation Amount Collected for Financial Class Type (Previous Years)	
UDS - Patient Related Revenue Report	336
Total Amount Collected for Financial Class Type	
UDS - Patient Related Revenue Report	336
Total Amount of Allowances for Financial Class Type	
UDS - Patient Related Revenue Report	336
Total Amount of Bad Debt Write-offs for Financial Class Type	
UDS - Patient Related Revenue Report	336
Total Amount of Charges for Financial Class Type	
UDS - Patient Related Revenue Report	336
Total Amount of Sliding Discounts for Financial Class Type	
UDS - Patient Related Revenue Report	336
Total Other Retroactive Payment Amount Collected for Financial Class Type	
UDS - Patient Related Revenue Report	336
Total Penalty or Payback Amount Collected for Financial Class Type	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Financial Class Type (Current Year)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Financial Class Type (Previous Years)	
UDS - Patient Related Revenue Report	336
First Visit Date	
First Visit Date	
New Patient List	184
Patient List	204

First Visit Date (continued)

Patient Route Slip	216	Number of Male Patients	
Letter Merge Reports	152	Practice Statistics Report	246
Fiscal Year		Number of Males	
Fiscal Year Month		UDS - Age/Gender Report	322
Audit Report - Clinics	30	Number of Males for Clinic	
Fiscal Year Month Change		UDS - Age/Gender Report	322
Audit Report - Clinics	30	Number of Males for Provider	
Practice Fiscal Year Month		UDS - Age/Gender Report	322
Registration Information Report	294	Number of Other Gender	
Fluoride Varnish		UDS - Age/Gender Report	322
Number of Patients 0 - 19 Years with Fluoride Varnish		Number of Other Gender for Clinic	
Clinical Quality Measures List	66	UDS - Age/Gender Report	322
Follow up		Number of Other Gender for Provider	
Number of Patients 65+ Years with Abnormal BMI		UDS - Age/Gender Report	322
Reading and Follow Up		Number of Unknown Gender	
Clinical Quality Measures List	66	UDS - Age/Gender Report	322
Form		Number of Unknown Gender for Clinic	
Consent Form		UDS - Age/Gender Report	322
Treatment Case Report	314	Number of Unknown Gender for Provider	
Format		UDS - Age/Gender Report	322
Claim Format		Patient Gender	
Insurance Carrier List	132	Patient List	204
Furcation Grade		Patient Questionnaire	214
Furcation Grade		Patient Route Slip	216
Perio - Data Chart Report	230	UDS - Age/Gender Report	322
Perio - Combined Graphic & Data Chart Report	228	Letter Merge Reports	152
Furcation Involvement		Percent of Female Patients	
Furcation Involvement (Facial)		Practice Statistics Report	246
Perio - Exam Comparison Report	232	Percent of Male Patients	
Perio - Combined Graphic & Data Chart Report	228	Practice Statistics Report	246
Furcation Involvement (Lingual)		Spouse Gender	
Perio - Exam Comparison Report	232	Patient Questionnaire	214
Perio - Combined Graphic & Data Chart Report	228	Total Number of All Genders	
Future Due Payment Agreement		UDS - Age/Gender Report	322
Future Due Payment Plan Total		Total Number of Females	
Future Due Payment Plan Report - Standard	128	UDS - Age/Gender Report	322
Future Due Payment Plan		Total Number of Males	
Amount of Future Due Payment Agreements		UDS - Age/Gender Report	322
Practice Analysis Report	242	Total Number of Other Gender	
Future Due Payment Plan Date		UDS - Age/Gender Report	322
Future Due Payment Plan Report - Standard	128	Total Number of Unknown Gender	
Gender		UDS - Age/Gender Report	322
Number of All Genders		Gender Identity	
UDS - Age/Gender Report	322	Gender Identity	
Number of All Genders for Clinic		UDS - Patient Status Report	338
UDS - Age/Gender Report	322	Generic	
Number of All Genders for Provider		Generic Substitution Permitted	
UDS - Age/Gender Report	322	Prescription Printout	250
Number of Female Patients		Gingival Margin	
Practice Statistics Report	246	Gingival Margin	
Number of Females		Perio - Data Chart Report	230
UDS - Age/Gender Report	322	Perio - Combined Graphic & Data Chart Report	228
Number of Females for Clinic		Gingival Margin (Facial)	
UDS - Age/Gender Report	322	Perio - Exam Comparison Report	232
Number of Females for Provider		Perio - Combined Graphic & Data Chart Report	228
UDS - Age/Gender Report	322	Gingival Margin (Lingual)	
		Perio - Exam Comparison Report	232
		Perio - Combined Graphic & Data Chart Report	228

Gingival Margin (continued)

Gingival Margin Graphic Chart		Amount of Suspended Credits for Guarantor	
Perio - Exam Comparison Report	232	Suspended Credits Report	312
Grace Period		Employer Address (for Guarantor)	
Grace Period		Patient Questionnaire	214
Payment Agreement Report	224	Employer Name (for Guarantor)	
Gratuity		Patient Questionnaire	214
Gratuity Given		Estimated Guarantor Portion	
Referred By Patient Report	290	Patient Route Slip	216
Last Gratuity Amount		Family Position	
Patient Route Slip	216	Collections Manager List	70
Last Gratuity Date		Guarantor Address	
Referred By Patient Report	290	Family Ledger Report	118
Referred by Doctor/Other Gratuity Given		Family Ledger Report (Single Family)	120
Referred By Doctor/Other Report	288	Patient Route Slip	216
Referred by Doctor/Other Last Gratuity Date		Truth in Lending Disclosure Statement	320
Referred By Doctor/Other Report	288	Walkout - Family Walkout	358
Group		Billing Statement	48
Insurance Plan Group Name		Guarantor Billing Type	
Insurance Claim Aging Report	140	Patient Route Slip	216
Insurance Coverage Tables Report	144	Guarantor Birth Date & Age	
Insurance Eligibility Report	146	Collections Manager List	70
Patient Treatment Case Report	218	Guarantor Chart Number	
Pre-Treatment Estimate Aging Report	252	Collections Manager List	70
Provider IDs List	272	Family Ledger Report	118
RVU Utilization Report	304	Family Ledger Report (Single Family)	120
Updated Dental Insurance Payment Table Report	352	Payment Agreement Amortization Schedule	222
Utilization Report	354	Truth in Lending Disclosure Statement	320
Insurance Carrier List	132	Walkout - Family Walkout	358
Insurance Plan Group NPI Number		Billing Statement	48
Dental Encounters Report	106	Guarantor City	
Group Number		Collections Manager List	70
Insurance Plan Group Number		Guarantor Employer	
Insurance Claim Aging Report	140	Patient Route Slip	216
Insurance Coverage Tables Report	144	Guarantor Estimate Amount	
Insurance Eligibility Report	146	Collections Manager List	70
Pre-Treatment Estimate Aging Report	252	Guarantor First Name	
Provider IDs List	272	Letter Merge Reports	152
RVU Utilization Report	304	Guarantor Home Phone Number	
Updated Dental Insurance Payment Table Report	352	Collections Manager List	70
Utilization Report	354	Collections Manager List	70
Walkout - Doctor's Statement	356	Future Due Payment Plan Report - Standard	128
Insurance Carrier List	132	Patient Route Slip	216
Insurance Plan Group Number for Primary Insurance		Payment Agreement Report	224
Patient Questionnaire	214	Truth in Lending Disclosure Statement	320
Insurance Plan Group Number for Secondary Insurance		Aging/Credit Balance Report	6
Patient Questionnaire	214	Guarantor Last Name	
Primary Insurance Plan Group Number		Letter Merge Reports	152
Treatment Plan Approval Report	316	Guarantor Name	
Treatment Plan Approval Status Report	318	Audit Report - Patients	34
Patient Route Slip	216	Billing Statement	48
Secondary Insurance Plan Group Number		Collections Manager List	70
Treatment Plan Approval Report	316	Family Ledger Report	118
Treatment Plan Approval Status Report	318	Family Ledger Report (Single Family)	120
Patient Route Slip	216	Finance Charge Report	124
Guarantor		Future Due Payment Plan Report - Standard	128
Amount of Guarantor Payments YTD		Late Charge Report	150
Walkout - Family Walkout	358	Patient Route Slip	216
		Patient's Ledger Report	220
		Payment Agreement Amortization Schedule	222
		Payment Agreement Report	224
		Suspended Credits Report	312
		Treatment Plan Approval Report	316

Guarantor (continued)

Treatment Plan Approval Status Report	318	Number of Patients 66+ Years with 2+ High-risk Medications	
Truth in Lending Disclosure Statement	320	Clinical Quality Measures List	66
Walkout - Family Walkout	358	Homeless Status	
Aging/Credit Balance Report	6	Homeless Status	
Guarantor Name Change		UDS - Patient Status Report	338
Audit Report - Patients	34	Patient Homeless Status	
Guarantor Note		Patient List (Filtered)	206
Patient Notes Report	208	Housing Status	
Aging/Credit Balance Report	6	Housing Status	
Guarantor Portions		UDS - Patient Status Report	338
Aging/Credit Balance Report	6	Hypertension	
Guarantor Social Security Number		Number of Patients 18 - 85 Years with Hypertension	
Patient Route Slip	216	Clinical Quality Measures List	66
Truth in Lending Disclosure Statement	320	ICD-9-CM Code	
Collections Manager List	70	ICD-9-CM Code	
Guarantor State		Patient List (Filtered)	206
Collections Manager List	70	Medical Code List	180
Guarantor Work Phone Number		ICD-9-CM Code Description	
Patient Route Slip	216	Medical Code List	180
Guarantor Work Phone Number & Extension		ID	
Collections Manager List	70	Patient Ext ID	
Guarantor Zip Code		Patient List (Filtered)	206
Collections Manager List	70	Immunization	
Number of Active Patient Guarantors		Immunization Date	
Practice Statistics Report	246	Patient List (Filtered)	206
Number of Non-patient Guarantors		Immunization Time	
Practice Statistics Report	246	Patient List (Filtered)	206
Percent of Active Patient Guarantors		Inactive	
Practice Statistics Report	246	Total Inactive New Patients	
Percent of Guarantor Portions		New Patient List	184
Aging/Credit Balance Report	6	Incorporate	
Percent of Non-patient Guarantors		Number of Incorporated Electronic Summary of Care Documents	
Practice Statistics Report	246	Meaningful Use Measure Calculation List	156
Total Amount of Guarantor Estimates		Number of Patients with Incorporated Health Data	
Collections Manager List	70	Meaningful Use Measure Calculation List	156
Total Amount of Guarantor Portions		Individual	
Aging/Credit Balance Report	6	Individual Benefits	
Guarantor Portion		Insurance Carrier List	132
Estimated Guarantor Portion		Lifetime/Individual/Standard Deductible	
Patient Route Slip	216	Insurance Carrier List	132
Guarantor Estimate Amount		Lifetime/Individual/Standard Other Deductible	
Collections Manager List	70	Insurance Carrier List	132
Guarantor Portions		Lifetime/Individual/Standard Preventative Deductible	
Aging/Credit Balance Report	6	Insurance Carrier List	132
Percent of Guarantor Portions		Influenza Vaccination	
Aging/Credit Balance Report	6	Number of Patients 6+ Months who Received Influenza Vaccinations	
Total Amount of Guarantor Estimates		Clinical Quality Measures List	66
Collections Manager List	70	Information	
Total Amount of Guarantor Portions		Accessed Patient Information	
Aging/Credit Balance Report	6	Audit Report - Combined	32
Health Information		Exported Patient Health Information	
Number of Patients with Incorporated Health Data		Audit Report - Combined	32
Meaningful Use Measure Calculation List	156	Initial Balance	
Height		Amount of Credit Initial Balances	
Height		Provider A/R Totals - Daily Report	264
Patient Health Assessment Report	198	Amount of Credit Initial Balances for Clinic	
High-risk		Analysis Summary Report - Standard	12
Number of Patients 66+ Years with 1+ High-risk Medications		Day Sheet Report	100
Clinical Quality Measures List	66		

Initial Balance (continued)

Analysis Summary Report - Daily	8
Amount of Credit Initial Balances for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Analysis Summary Report - Daily	8
Amount of Debit Initial Balances (Production)	
Provider A/R Totals - Daily Report	264
Amount of Debit Initial Balances (Production) for Prov	
Provider A/R Totals - Standard Report	266
Provider A/R Totals - Daily Report	264
Amount of Debit Initial Balances for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Debit Initial Balances for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Other Applied Credit Initial Balances for Clinic	
Day Sheet Report	100
Amount of Other Applied Credit Initial Balances for Provider	
Day Sheet Report	100
Amount of Other Credit Initial Balances for Clinic	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Amount of Other Credit Initial Balances for Provider	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Credit Initial Balance	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Debit Initial Balance	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Other Credit Initial Balance	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Total Amount of Credit Initial Balances	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Analysis Summary Report - Daily	8
Total Amount of Debit Initial Balances	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Debit Initial Balances (Production)	
Provider A/R Totals - Standard Report	266
Provider A/R Totals - Daily Report	264
Total Amount of Other Applied Credit Initial Balances	
Day Sheet Report	100
Total Amount of Other Credit Initial Balances	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8

Initial Provider

Average Payment Amount for Initial Provider	
Day Sheet (Receipts) Report	98
Initial Provider	
Day Sheet (Receipts) Report	98
Quantity of Payments for Initial Provider	
Day Sheet (Receipts) Report	98
Total Amount of Payments for Initial Provider	
Day Sheet (Receipts) Report	98

Inserted

Inserted Appointment	
Audit Report - Appointments	26
Inserted Procedure	
Audit Report - Combined	32
Inserted Transaction	
Audit Report - Transactions	38

Insurance

Account Estimated Insurance Portion	
Patient Route Slip	216
Amount Billed to Insurance	
Analysis Summary Report - Standard	12
Collections Manager List	70
Analysis Summary Report - Daily	8
Amount Billed to Insurance for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount Billed to Insurance for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Annual Primary Insurance Plan Benefits for Family	
Treatment Case Report	314
Amount of Annual Secondary Insurance Plan Benefits for Family	
Treatment Case Report	314
Amount of Annual Secondary Insurance Plan Benefits for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Applied Insurance Payments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Applied Insurance Payments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Charges Billed to Insurance for Previous Month for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Claim	
Insurance Claims Not Sent Report	142
Amount of Co-pays for Insurance Carrier	
Utilization Report	354
Amount of Current Charges Billed to Insurance for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Dental Insurance Portion	
Patient Chart Printout	196

Insurance (continued)

Amount of Estimated Insurance Portion Insurance Claim Aging Report	140	Amount of Pending Estimated Secondary Insurance Portions YTD for Family Treatment Case Report	314
Amount of Estimated Primary Insurance Benefits Remaining YTD for Family Treatment Case Report	314	Amount of Pending Estimated Secondary Insurance Portions YTD for Patient Treatment Case Report	314
Amount of Estimated Primary Insurance Benefits Remaining YTD for Patient Treatment Case Report	314	Patient Treatment Case Report	218
Amount of Estimated Secondary Insurance Benefits Remaining YTD for Family Treatment Case Report	314	Amount of Preventative Deductible Owed by Family to Primary Insurance Patient Route Slip	216
Amount of Estimated Secondary Insurance Benefits Remaining YTD for Patient Treatment Case Report	314	Amount of Preventative Deductible Owed by Family to Secondary Insurance Patient Route Slip	216
Amount of Fees - Co-pays for Insurance Carrier Utilization Report	354	Amount of Preventative Deductible Owed to Primary Insurance Patient Route Slip	216
Amount of Insurance Estimate Billing Statement	48	Amount of Preventative Deductible Owed to Secondary Insurance Patient Route Slip	216
Amount of Insurance Estimates Aging/Credit Balance Report	6	Amount of Primary Insurance Benefits Remaining Unscheduled Treatment Plans (Detailed) Report 350	350
Amount of Insurance Payments Provider A/R Totals - Daily Report	264	Patient Route Slip	216
Amount of Insurance Payments for Provider Provider A/R Totals - Standard Report	266	Amount of Primary Insurance Benefits Used Patient Route Slip	216
Provider A/R Totals - Daily Report	264	Amount of Primary Insurance Paid Benefits YTD for Family Treatment Case Report	314
Amount of Insurance Payments YTD Walkout - Family Walkout	358	Amount of Primary Insurance Paid Benefits YTD for Patient Treatment Case Report	314
Amount of MTD Charges Billed to Insurance for Provider Day Sheet (Charges and Receipts) Report	94	Patient Treatment Case Report	218
Amount of Other Applied Insurance Payments for Clinic Analysis Summary Report - Standard	12	Amount of Primary Insurance Portion Practice Treatment Case Report	248
Day Sheet Report	100	Treatment Case Report	314
Analysis Summary Report - Daily	8	Patient Treatment Case Report	218
Amount of Other Applied Insurance Payments for Provider Analysis Summary Report - Standard	12	Amount of Primary Insurance Portion for Case Practice Treatment Case Report	248
Day Sheet Report	100	Patient Treatment Case Report	218
Analysis Summary Report - Daily	8	Amount of Primary Insurance Portion for Visit Practice Treatment Case Report	248
Amount of Other Deductible Owed by Family to Primary Insurance Patient Route Slip	216	Treatment Case Report	314
Amount of Other Deductible Owed by Family to Secondary Insurance Patient Route Slip	216	Patient Treatment Case Report	218
Amount of Other Deductible Owed to Primary Insurance Patient Route Slip	216	Amount of Remaining Benefits for Primary Insurance Treatment Plan Approval Status Report	318
Amount of Other Deductible Owed to Secondary Insurance Patient Route Slip	216	Treatment Plan Approval Report	316
Amount of Pending Estimated Primary Insurance Portions YTD for Family Treatment Case Report	314	Amount of Remaining Benefits for Secondary Insurance Treatment Plan Approval Status Report	318
Amount of Pending Estimated Primary Insurance Portions YTD for Patient Treatment Case Report	314	Treatment Plan Approval Report	316
Patient Treatment Case Report	218	Amount of Secondary Insurance Benefits Remaining Unscheduled Treatment Plans (Detailed) Report 350	350
		Patient Route Slip	216
		Amount of Secondary Insurance Benefits Used Patient Route Slip	216
		Amount of Secondary Insurance Portion Practice Treatment Case Report	248
		Treatment Case Report	314
		Patient Treatment Case Report	218
		Amount of Secondary Insurance Portion for Case Practice Treatment Case Report	248
		Patient Treatment Case Report	218

Insurance (continued)

Amount of Secondary Insurance Portion for Visit		Date Insurance Last Updated	
Practice Treatment Case Report	248	Insurance Carrier List	132
Treatment Case Report	314	Debit Adjustment Amount for Insurance Plan	
Patient Treatment Case Report	218	Insurance Carrier Production - Summary Report	138
Amount of Standard Deductible Owed by Family to Primary Insurance		Insurance Carrier Production - Full Report	136
Patient Route Slip	216	Deductible Type	
Amount of Standard Deductible Owed by Family to Secondary Insurance		Standard Coverage Tables Report	310
Patient Route Slip	216	Insurance Coverage Tables Report	144
Amount of Standard Deductible Owed to Primary Insurance		Do not Bill to Dental Insurance	
Patient Route Slip	216	Insurance Carrier List	132
Amount of Standard Deductible Owed to Secondary Insurance		Do not Bill to Dental Insurance if 0% Coverage	
Patient Route Slip	216	Insurance Carrier List	132
Amount of Suspended Insurance Payments for Clinic		Do not Print Dental Diagnostic Codes on Claim	
Analysis Summary Report - Standard	12	Insurance Carrier List	132
Day Sheet Report	100	Estimated Amount of Deductibles to Be Applied	
Analysis Summary Report - Daily	8	Treatment Case Report	314
Amount of Suspended Insurance Payments for Provider		Patient Treatment Case Report	218
Analysis Summary Report - Standard	12	Estimated Amount of Insurance Payments	
Day Sheet Report	100	Treatment Case Report	314
Analysis Summary Report - Daily	8	Patient Treatment Case Report	218
Amount of YTD Charges Billed to Insurance for Provider		Estimated Insurance Portion	
Day Sheet (Charges and Receipts) Report	94	Patient Proposed Treatment Case Report (Your Care Plan)	212
Amount Paid by Insurance		Dental Encounters Report	106
Dental Encounters Report	106	Family Benefits	
Applied Insurance Payment Amount		Insurance Carrier List	132
Analysis Summary Report - Standard	12	Grand Total Amount of Insurance Payments Received	
Analysis Summary Report - Daily	8	Insurance Transaction Analysis Report	148
Benefit Renewal Month		Grand Total Amount of Insured Charges	
Insurance Carrier List	132	Insurance Transaction Analysis Report	148
Billable to Insurance		Grand Total Number of Insurance Claims Sent	
Procedure Code List	256	Insurance Transaction Analysis Report	148
Claim Amount		Grand Total Number of Insurance Payments Received	
Secondary Insurance Claims Not Created Report	306	Insurance Transaction Analysis Report	148
Insurance Transaction Analysis Report	148	Grand Total Number of Insured Charges	
Claim Date		Insurance Transaction Analysis Report	148
Insurance Claims Not Sent Report	142	Grand Total Number of Paid/Received Claims	
Claim Expiration Date		Insurance Transaction Analysis Report	148
Procedures Not Attached to Insurance Report	258	Individual Benefits	
Secondary Insurance Claims Not Created Report	306	Insurance Carrier List	132
Insurance Claims Not Sent Report	142	Insurance Claim Note	
Claim Format		Patient Notes Report	208
Insurance Carrier List	132	Insurance Coverage Percent (Basic) for Primary Insurance	
Claim On Hold Date		Patient Route Slip	216
Insurance Claim Aging Report	140	Insurance Coverage Percent (Basic) for Secondary Insurance	
Claim Payment Received Date		Patient Route Slip	216
Insurance Transaction Analysis Report	148	Insurance Coverage Percent (Major) for Primary Insurance	
Co-pay Calculation for Insurance Portion		Patient Route Slip	216
Insurance Coverage Tables Report	144	Insurance Coverage Percent (Major) for Secondary Insurance	
Coverage Table Name		Patient Route Slip	216
Standard Coverage Tables Report	310	Insurance Coverage Percent (Orthodontics) for Primary Insurance	
Credit Adjustment Amount for Insurance Plan		Patient Route Slip	216
Insurance Carrier Production - Summary Report	138	Insurance Coverage Percent (Orthodontics) for Secondary Insurance	
Insurance Carrier Production - Full Report	136	Patient Route Slip	216

Insurance (continued)

Insurance Coverage Percent (Preventative) for Primary Insurance		Other Deductible Met	
Patient Route Slip	216	Insurance Carrier List	132
Insurance Coverage Percent (Preventative) for Secondary Insurance		Other Deductible Owed by Family to Primary Insurance	
Patient Route Slip	216	Treatment Case Report	314
Insurance Coverage Type		Other Deductible Owed by Family to Secondary Insurance	
Insurance Claims Not Sent Report	142	Treatment Case Report	314
Insurance Eligibility Report	146	Other Deductible Owed by Patient to Primary Insurance	
Pre-Treatment Estimate Aging Report	252	Treatment Case Report	314
Pre-Treatment Estimates Not Sent Report	254	Patient Treatment Case Report	218
Insurance Claim Aging Report	140	Other Deductible Owed by Patient to Secondary Insurance	
Insurance Eligibility Date		Treatment Case Report	314
Insurance Eligibility Report	146	Patient Treatment Case Report	218
Insurance Estimate Amount		Outstanding Primary Insurance Estimated Amount	
Collections Manager List	70	Treatment Plan Approval Status Report	318
Insurance Estimated Amount		Treatment Plan Approval Report	316
Walkout - Family Walkout	358	Outstanding Secondary Insurance Estimated Amount	
Insurance Payment Amount		Treatment Plan Approval Status Report	318
Insurance Carrier Production - Full Report	136	Treatment Plan Approval Report	316
Insurance Payment Amount for Insurance Plan		Patient Estimated Insurance Portion	
Insurance Carrier Production - Summary Report	138	Patient Route Slip	216
Insurance Carrier Production - Full Report	136	Patient Relationship to Subscriber for Primary Insurance	
Insurance Payment for Date of Service		Patient Questionnaire	214
Letter Merge Reports	152	Patient Relationship to Subscriber for Secondary Insurance	
Last Eligibility Date for Primary Insurance Coverage		Patient Questionnaire	214
Treatment Plan Approval Status Report	318	Payor ID	
Treatment Plan Approval Report	316	Insurance Carrier List	132
Last Eligibility Date for Secondary Insurance Coverage		Pending Claims	
Treatment Plan Approval Status Report	318	Patient Route Slip	216
Treatment Plan Approval Report	316	Percent of Insurance Estimate Amounts	
Lifetime/Individual/Standard Deductible		Aging/Credit Balance Report	6
Insurance Carrier List	132	Percent of Patients with Dental and Medical Insurance	
Lifetime/Individual/Standard Other Deductible		Practice Statistics Report	246
Insurance Carrier List	132	Percent of Patients with Primary Dental Insurance Only	
Lifetime/Individual/Standard Preventative Deductible		Practice Statistics Report	246
Insurance Carrier List	132	Percent of Patients with Primary Medical Insurance	
Maximum Primary Insurance Benefit Amount		Practice Statistics Report	246
Patient Route Slip	216	Percent of Patients with Secondary Dental Insurance	
Maximum Secondary Insurance Benefit Amount		Practice Statistics Report	246
Patient Route Slip	216	Percent of Patients without Dental and Medical Insurance	
Number of Patients with Dental and Medical Insurance		Practice Statistics Report	246
Practice Statistics Report	246	Percent of Patients without Dental Insurance	
Number of Patients with Primary Dental Insurance Only		Practice Statistics Report	246
Practice Statistics Report	246	Percent of Patients without Medical Insurance	
Number of Patients with Primary Medical Insurance		Practice Statistics Report	246
Practice Statistics Report	246	Pre-authorization Required	
Number of Patients with Secondary Dental Insurance		Standard Coverage Tables Report	310
Practice Statistics Report	246	Insurance Coverage Tables Report	144
Number of Patients without Dental and Medical Insurance		Pre-treatment Estimate Amount	
Practice Statistics Report	246	Patient Route Slip	216
Number of Patients without Dental Insurance		Pre-Treatment Estimate Aging Report	252
Practice Statistics Report	246	Pre-Treatment Estimates Not Sent Report	254
Number of Patients without Medical Insurance		Secondary Pre-Treatment Estimates Not Created Report	308
Practice Statistics Report	246	Insurance Transaction Analysis Report	148
Other Applied Insurance Payment Amount		Preventative Deductible Met	
Analysis Summary Report - Standard	12	Insurance Carrier List	132
Analysis Summary Report - Daily	8	Preventative Deductible Owed by Family to Primary Insurance	
		Treatment Case Report	314

Insurance (continued)

Preventative Deductible Owed by Family to Secondary Ins		Standard Deductible Met	
Treatment Case Report	314	Insurance Carrier List	132
Preventative Deductible Owed by Patient to Primary Ins		Standard Deductible Owed by Family to Primary Insurance	
Treatment Case Report	314	Treatment Case Report	314
Patient Treatment Case Report	218	Standard Deductible Owed by Family to Secondary Insurance	
Preventative Deductible Owed by Patient to Secondary Ins		Treatment Case Report	314
Treatment Case Report	314	Standard Deductible Owed by Patient to Primary Insurance	
Patient Treatment Case Report	218	Treatment Case Report	314
Primary Claim Date		Patient Treatment Case Report	218
Secondary Insurance Claims Not Created Report	306	Standard Deductible Owed by Patient to Secondary Insurance	
Primary Eligibility Date		Treatment Case Report	314
Appointment Book View Printout	14	Patient Treatment Case Report	218
Primary Insurance Benefits Expiration Date for Family		Subscriber Address for Primary Insurance	
Treatment Case Report	314	Patient Questionnaire	214
Primary Insurance Benefits Expiration Date for Patient		Subscriber Address for Secondary Insurance	
Treatment Case Report	314	Patient Questionnaire	214
Patient Treatment Case Report	218	Subscriber Birth Date for Primary Insurance	
Primary Insurance Benefits Remaining		Patient Questionnaire	214
Letter Merge Reports	152	Subscriber Birth Date for Secondary Insurance	
Primary Insurance Benefits Renewal Month		Patient Questionnaire	214
Patient Route Slip	216	Subscriber ID for Primary Insurance	
Primary Insurance Estimated Amount		Patient Questionnaire	214
Treatment Plan Approval Status Report	318	Subscriber ID for Secondary Insurance	
Treatment Plan Approval Report	316	Patient Questionnaire	214
Primary Insurance Subscriber ID		Subscriber Name for Primary Insurance	
Letter Merge Reports	152	Patient Route Slip	216
Projected Amount of Remaining Benefits for Secondary Insurance		Patient Questionnaire	214
Treatment Plan Approval Status Report	318	Subscriber Name for Secondary Insurance	
Treatment Plan Approval Report	316	Patient Route Slip	216
Remarks for Unusual Service		Patient Questionnaire	214
Walkout - Doctor's Statement	356	Subscriber's Employer Address for Primary Insurance	
Rendering Provider NPI Number		Patient Questionnaire	214
Dental Encounters Report	106	Subscriber's Employer Address for Secondary Insurance	
Replace Initial Zero of Procedure Code on Claims		Patient Questionnaire	214
Insurance Carrier List	132	Subscriber's Employer Name for Primary Insurance	
Revenue for Provider from Insurance		Patient Questionnaire	214
Provider Revenue - Charges Report	276	Subscriber's Employer Name for Secondary Insurance	
Provider Revenue - Credits Report	278	Patient Questionnaire	214
Provider Revenue - Summary Report	280	Suspended Insurance Payment Amount	
Provider Revenue - Allocations Report	274	Analysis Summary Report - Standard	12
Secondary Eligibility Date		Analysis Summary Report - Daily	8
Appointment Book View Printout	14	Total Amount Billed to Insurance	
Secondary Insurance Benefits Expiration Date for Family		Analysis Summary Report - Standard	12
Treatment Case Report	314	Collections Manager List	70
Secondary Insurance Benefits Expiration Date for Patient		Day Sheet Report	100
Treatment Case Report	314	Analysis Summary Report - Daily	8
Patient Treatment Case Report	218	Total Amount for Primary Pre-treatment Estimates	
Secondary Insurance Benefits Remaining		Pre-Treatment Estimate Aging Report	252
Letter Merge Reports	152	Total Amount for Secondary Pre-treatment Estimates	
Secondary Insurance Benefits Renewal Month		Pre-Treatment Estimate Aging Report	252
Patient Route Slip	216	Total Amount of Account Balances Aged 1 - 30 for Pre-treatment Estimates	
Secondary Insurance Estimated Amount		Pre-Treatment Estimate Aging Report	252
Treatment Plan Approval Status Report	318	Total Amount of Account Balances Aged 1 - 30 with Claims	
Treatment Plan Approval Report	316	Insurance Claim Aging Report	140

Insurance (continued)

Total Amount of Account Balances Aged 1 - 30 with Primary Claims		Total Amount of Account Balances Aged 181+ with Secondary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 1 - 30 with Secondary Claims		Total Amount of Account Balances Aged 31 - 60 for Pre-treatment Estimates	
Insurance Claim Aging Report	140	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 121 - 150 for Pre-treatment Estimates		Total Amount of Account Balances Aged 31 - 60 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 121 - 150 for Primary Pre-treatment Estimates		Total Amount of Account Balances Aged 31 - 60 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 121 - 150 for Secondary Pre-treatment Estimates		Total Amount of Account Balances Aged 31 - 60 with Claims	
Pre-Treatment Estimate Aging Report	252	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 121 - 150 with Claims		Total Amount of Account Balances Aged 31 - 60 with Primary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 121 - 150 with Primary Claims		Total Amount of Account Balances Aged 31 - 60 with Secondary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 121 - 150 with Secondary Claims		Total Amount of Account Balances Aged 61 - 90 for Pre-treatment Estimates	
Insurance Claim Aging Report	140	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 151 - 180 for Pre-treatment Estimates		Total Amount of Account Balances Aged 61 - 90 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 151 - 180 for Primary Pre-treatment Estimates		Total Amount of Account Balances Aged 61 - 90 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 151 - 180 for Secondary Pre-treatment Estimates		Total Amount of Account Balances Aged 61 - 90 with Claims	
Pre-Treatment Estimate Aging Report	252	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 151 - 180 with Claims		Total Amount of Account Balances Aged 61 - 90 with Primary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 151 - 180 with Primary Claims		Total Amount of Account Balances Aged 61 - 90 with Secondary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 151 - 180 with Secondary Claims		Total Amount of Account Balances Aged 91 - 120 for Pre-treatment Estimates	
Insurance Claim Aging Report	140	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 181+ for Pre-treatment Estimates		Total Amount of Account Balances Aged 91 - 120 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 181+ for Primary Pre-treatment Estimates		Total Amount of Account Balances Aged 91 - 120 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252	Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 181+ for Secondary Pre-treatment Estimates		Total Amount of Account Balances Aged 91 - 120 with Claims	
Pre-Treatment Estimate Aging Report	252	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 181+ with Claims		Total Amount of Account Balances Aged 91 - 120 with Primary Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 181+ with Primary Claims		Total Amount of Account Balances with Claims	
Insurance Claim Aging Report	140	Insurance Claim Aging Report	140
		Total Amount of Account Balances with Pre-treatment Estimates	
		Pre-Treatment Estimate Aging Report	252

Insurance (continued)

Total Amount of Account Balances with Primary Claims Insurance Claim Aging Report	140	Total Amount of Primary and Secondary Claims not Sent Insurance Claims Not Sent Report	142
Total Amount of Account Balances with Primary Pre-treatment Estimates Pre-Treatment Estimate Aging Report	252	Total Amount of Primary Claims not Sent Insurance Claims Not Sent Report	142
Total Amount of Account Balances with Secondary Claims Insurance Claim Aging Report	140	Total Amount of Primary Insurance Portion for Case Treatment Case Report	314
Total Amount of Account Balances with Secondary Pre-treatment Estimates Pre-Treatment Estimate Aging Report	252	Total Amount of Primary Pre-treatment Estimates not Sent Pre-Treatment Estimates Not Sent Report	254
Total Amount of Applied Insurance Payments Analysis Summary Report - Standard	12	Total Amount of Primary Production Insurance Carrier Production - Summary Report	138
Day Sheet Report	100	Insurance Carrier Production - Full Report	136
Analysis Summary Report - Daily	8	Total Amount of Secondary Claims not Created Secondary Insurance Claims Not Created Report	306
Total Amount of Charges Billed to Insurance for Previous Month Day Sheet (Charges and Receipts) Report	94	Total Amount of Secondary Claims not Sent Insurance Claims Not Sent Report	142
Total Amount of Co-pays Utilization Report	354	Total Amount of Secondary Insurance Portion for Case Treatment Case Report	314
Total Amount of Current Charges Billed to Insurance Day Sheet (Charges and Receipts) Report	94	Total Amount of Secondary Pre-treatment Estimates not Created Secondary Pre-Treatment Estimates Not Created Report	308
Total Amount of Dental Insurance Portions Patient Chart Printout	196	Total Amount of Secondary Pre-treatment Estimates not Sent Pre-Treatment Estimates Not Sent Report	254
Total Amount of Estimated Insurance Portion for Primary and Secondary Claims Insurance Claim Aging Report	140	Total Amount of Secondary Production Insurance Carrier Production - Summary Report	138
Total Amount of Estimated Insurance Portion for Primary Claims Insurance Claim Aging Report	140	Insurance Carrier Production - Full Report	136
Total Amount of Estimated Insurance Portion for Secondary Claims Insurance Claim Aging Report	140	Total Amount of YTD Charges Billed to Insurance Day Sheet (Charges and Receipts) Report	94
Total Amount of Fees - Co-pays Utilization Report	354	Total Amount of YTD Insurance Payments for Family Family Ledger Report (Single Family)	120
Total Amount of Insurance Estimates Collections Manager List	70	Family Ledger Report	118
Aging/Credit Balance Report	6	Total Estimated Insurance Portion Patient Proposed Treatment Case Report (Your Care Plan)	212
Total Amount of Insurance Payments Insurance Carrier Production - Summary Report	138	Total Number of Insurance Claims Sent Insurance Transaction Analysis Report	148
Operator Day Sheet Report	188	Total Number of Insurance Payments Received Insurance Transaction Analysis Report	148
Provider A/R Totals - Daily Report	264	Total Number of Insured Charges Insurance Transaction Analysis Report	148
Provider A/R Totals - Standard Report	266	Total Number of Paid/Received Claims Insurance Transaction Analysis Report	148
Insurance Carrier Production - Full Report	136	Total Revenue from Insurance Provider Revenue - Charges Report	276
Total Amount of Insurance Payments Received Insurance Transaction Analysis Report	148	Provider Revenue - Credits Report	278
Total Amount of Insured Charges Insurance Transaction Analysis Report	148	Provider Revenue - Summary Report	280
Total Amount of MTD Charges Billed to Insurance Day Sheet (Charges and Receipts) Report	94	Provider Revenue - Allocations Report	274
Total Amount of Other Applied Insurance Payments Analysis Summary Report - Standard	12	Insurance Carrier	
Day Sheet Report	100	Amount of Co-pays for Insurance Carrier Utilization Report	354
Analysis Summary Report - Daily	8	Amount of Fees - Co-pays for Insurance Carrier Utilization Report	354
Total Amount of Pre-treatment Estimates Pre-Treatment Estimate Aging Report	252	Amount of Fees for Insurance Carrier Utilization Report	354
Total Amount of Pre-treatment Estimates not Sent Pre-Treatment Estimates Not Sent Report	254	RVU Utilization Report	304
		Amount of RVUs for Insurance Carrier RVU Utilization Report	304

Insurance Carrier (continued)

Insurance Carrier Address		Secondary Dental Insurance Carrier Name	
Insurance Coverage Tables Report	144	Patient List	204
Provider IDs List	272	Secondary Insurance Carrier Name	
Updated Dental Insurance Payment Table Report	352	Patient Route Slip	216
Insurance Carrier List	132	Secondary Insurance Claims Not Created Report	306
Insurance Carrier City and State		Secondary Pre-Treatment Estimates Not Created Report	308
Insurance Eligibility Report	146	Treatment Plan Approval Report	316
Insurance Carrier Contact Name		Treatment Plan Approval Status Report	318
Provider IDs List	272	Unscheduled Treatment Plans (Detailed) Report	350
Insurance Carrier List	132	Letter Merge Reports	152
Insurance Carrier Name		Secondary Insurance Carrier Plan Employer	
Insurance Claim Aging Report	140	Patient Route Slip	216
Insurance Claims Not Sent Report	142	Secondary Medical Insurance Carrier Name	
Insurance Coverage Tables Report	144	Patient List	204
Insurance Eligibility Report	146	Insurance Payment	
Pre-Treatment Estimate Aging Report	252	Total Amount of Suspended Insurance Payments	
Pre-Treatment Estimates Not Sent Report	254	Analysis Summary Report - Standard	12
Provider IDs List	272	Day Sheet Report	100
RVU Utilization Report	304	Analysis Summary Report - Daily	8
Treatment Case Report	314	Total Amount of YTD Insurance Payments for Family	
Updated Dental Insurance Payment Table Report	352	Family Ledger Report (Single Family)	120
Utilization Report	354	Family Ledger Report	118
Walkout - Doctor's Statement	356	Insurance Plan	
Insurance Carrier List	132	Amount of Annual Primary Insurance Plan Benefits for Family	
Insurance Carrier Payor ID		Treatment Case Report	314
Provider IDs List	272	Amount of Annual Primary Insurance Plan Benefits for Patient	
Insurance Carrier Phone Number		Treatment Case Report	314
Insurance Claim Aging Report	140	Patient Treatment Case Report	218
Insurance Eligibility Report	146	Amount of Annual Secondary Insurance Plan Benefits for Family	
Pre-Treatment Estimate Aging Report	252	Treatment Case Report	314
Provider IDs List	272	Amount of Annual Secondary Insurance Plan Benefits for Patient	
RVU Utilization Report	304	Treatment Case Report	314
Utilization Report	354	Patient Treatment Case Report	218
Insurance Carrier List	132	Credit Adjustment Amount for Insurance Plan	
Insurance Carrier Street Address		Insurance Carrier Production - Summary Report	138
Insurance Eligibility Report	146	Insurance Carrier Production - Full Report	136
Number of Office Visits for Insurance Carrier		Debit Adjustment Amount for Insurance Plan	
Utilization Report	354	Insurance Carrier Production - Summary Report	138
RVU Utilization Report	304	Insurance Carrier Production - Full Report	136
Number of Patients Seen for Insurance Carrier		Insurance Payment Amount for Insurance Plan	
Utilization Report	354	Insurance Carrier Production - Summary Report	138
RVU Utilization Report	304	Insurance Carrier Production - Full Report	136
Patient Insurance Carrier Name		Insurance Plan Employer	
Continuing Care Display List	76	Insurance Carrier List	132
Primary Dental Insurance Carrier Name		Insurance Plan Employer Name	
Patient List	204	Walkout - Doctor's Statement	356
Primary Insurance Carrier Name		Provider IDs List	272
Patient Route Slip	216	Insurance Plan Group Name	
Treatment Plan Approval Report	316	Insurance Claim Aging Report	140
Treatment Plan Approval Status Report	318	Insurance Coverage Tables Report	144
Unscheduled Treatment Plans (Detailed) Report	350	Insurance Eligibility Report	146
Letter Merge Reports	152	Patient Treatment Case Report	218
Primary Insurance Carrier Plan Employer			
Patient Route Slip	216		
Primary Medical Insurance Carrier Name			
Patient List	204		

Insurance Plan (continued)

Pre-Treatment Estimate Aging Report	252	Secondary Insurance Plan Renewal Month	
Provider IDs List	272	Unscheduled Treatment Plans (Detailed) Report	350
RVU Utilization Report	304	Secondary Production Amount for Insurance Plan	
Updated Dental Insurance Payment Table Report	352	Insurance Carrier Production - Summary Report	138
Utilization Report	354	Insurance Carrier Production - Full Report	136
Insurance Carrier List	132	Insurance Portion	
Insurance Plan Group NPI Number		Account Estimated Insurance Portion	
Dental Encounters Report	106	Patient Route Slip	216
Insurance Plan Group Number		Amount of Dental Insurance Portion	
Insurance Claim Aging Report	140	Patient Chart Printout	196
Insurance Coverage Tables Report	144	Amount of Estimated Insurance Portion	
Insurance Eligibility Report	146	Insurance Claim Aging Report	140
Pre-Treatment Estimate Aging Report	252	Amount of Pending Estimated Primary Insurance Portions YTD for Family	
Provider IDs List	272	Treatment Case Report	314
RVU Utilization Report	304	Amount of Pending Estimated Primary Insurance Portions YTD for Patient	
Updated Dental Insurance Payment Table Report	352	Treatment Case Report	314
Utilization Report	354	Patient Treatment Case Report	218
Walkout - Doctor's Statement	356	Amount of Pending Estimated Secondary Insurance Portions YTD for Family	
Insurance Carrier List	132	Treatment Case Report	314
Insurance Plan Group Number for Primary Insurance		Amount of Pending Estimated Secondary Insurance Portions YTD for Patient	
Patient Questionnaire	214	Treatment Case Report	314
Insurance Plan Group Number for Secondary Insurance		Patient Treatment Case Report	218
Patient Questionnaire	214	Amount of Primary Insurance Portion	
Insurance Plan Name		Practice Treatment Case Report	248
Insurance Carrier Production - Full Report	136	Treatment Case Report	314
Insurance Carrier Production - Summary Report	138	Patient Treatment Case Report	218
Document Center Document	112	Amount of Primary Insurance Portion for Case	
Insurance Plan Name and Address for Primary Insurance		Practice Treatment Case Report	248
Patient Questionnaire	214	Patient Treatment Case Report	218
Insurance Plan Name and Address for Secondary Insurance		Amount of Primary Insurance Portion for Visit	
Patient Questionnaire	214	Practice Treatment Case Report	248
Insurance Plan Note		Treatment Case Report	314
Patient Notes Report	208	Patient Treatment Case Report	218
Insurance Plan Union Number		Amount of Secondary Insurance Portion	
Provider IDs List	272	Practice Treatment Case Report	248
Insurance Carrier List	132	Treatment Case Report	314
Primary Insurance Carrier Plan Employer		Patient Treatment Case Report	218
Patient Route Slip	216	Amount of Secondary Insurance Portion for Case	
Primary Insurance Plan Group Number		Practice Treatment Case Report	248
Treatment Plan Approval Report	316	Patient Treatment Case Report	218
Treatment Plan Approval Status Report	318	Amount of Secondary Insurance Portion for Visit	
Patient Route Slip	216	Practice Treatment Case Report	248
Primary Insurance Plan Renewal Month		Treatment Case Report	314
Unscheduled Treatment Plans (Detailed) Report	350	Patient Treatment Case Report	218
Primary Production Amount for Insurance Plan		Co-pay Calculation for Insurance Portion	
Insurance Carrier Production - Summary Report	138	Insurance Coverage Tables Report	144
Insurance Carrier Production - Full Report	136	Estimated Insurance Portion	
Secondary Insurance Carrier Plan Employer		Patient Proposed Treatment Case Report (Your Care Plan)	212
Patient Route Slip	216	Dental Encounters Report	106
Secondary Insurance Plan Group Number		Patient Estimated Insurance Portion	
Treatment Plan Approval Report	316	Patient Route Slip	216
Treatment Plan Approval Status Report	318	Total Amount of Dental Insurance Portions	
Patient Route Slip	216	Patient Chart Printout	196

Insurance Portion (continued)

Total Amount of Estimated Insurance Portion for Primary and Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Estimated Insurance Portion for Primary Claims	
Insurance Claim Aging Report	140
Total Amount of Estimated Insurance Portion for Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Primary Insurance Portion for Case	
Treatment Case Report	314
Total Amount of Secondary Insurance Portion for Case	
Treatment Case Report	314
Total Estimated Insurance Portion	
Patient Proposed Treatment Case Report (Your Care Plan)	212

Insured

Amount of Insured Charges (Average)	
Practice Analysis Report	242
Amount of Insured Charges (for Date Range)	
Practice Analysis Report	242
Amount of Insured Charges (MTD)	
Practice Analysis Report	242
Amount of Insured Charges (YTD)	
Practice Analysis Report	242
Number of Insured Active Patients	
Practice Analysis Report	242
Number of Insured Patients	
Insurance Carrier List	132

Interest

Payment Agreement Payment Portion Applied to Interest	
Payment Agreement Amortization Schedule	222

Interest Rate

Interest Rate	
Truth in Lending Disclosure Statement	320

Interval

Payment Agreement Interval	
Payment Agreement Report	224
Payment Interval	
Payment Agreement Amortization Schedule	222

Lab

Amount of Lab Expenses for Clinic	
RVU Day Sheet Report	296
Amount of Lab Expenses for Medicaid Procedures for Clinic	
RVU Production Summary Report	298
Amount of Lab Expenses for Medicaid Procedures for Provider	
RVU Production Summary Report	298
Amount of Lab Expenses for Provider	
RVU Day Sheet Report	296
Amount of Lab Expenses of Non-Medicaid Procedures for Clinic	
RVU Production Summary Report	298
Amount of Lab Expenses of Non-Medicaid Procedures for Provider	
RVU Production Summary Report	298
Amount of Lab Expenses of Procedures for Clinic	
RVU Production Summary Report	298

Amount of Lab Expenses of Procedures for Provider	
RVU Production Summary Report	298
Lab Case Note	
Patient Notes Report	208
Lab Expense	
RVU Schedules Report	302
Fee Schedules Report	122
Lab Expense Amount	
RVU Day Sheet Report	296
Total Amount of Lab Expenses	
RVU Day Sheet Report	296
Total Amount of Lab Expenses of Medicaid Procedures	
RVU Production Summary Report	298
Total Amount of Lab Expenses of Non-Medicaid Procedures	
RVU Production Summary Report	298
Total Amount of Lab Expenses of Procedures	
RVU Production Summary Report	298

Lab Case

Lab Case Note	
Patient Notes Report	208

Lab Expense

Amount of Lab Expenses for Clinic	
RVU Day Sheet Report	296
Amount of Lab Expenses for Medicaid Procedures for Clinic	
RVU Production Summary Report	298
Amount of Lab Expenses for Medicaid Procedures for Provider	
RVU Production Summary Report	298
Amount of Lab Expenses for Provider	
RVU Day Sheet Report	296
Amount of Lab Expenses of Non-Medicaid Procedures for Clinic	
RVU Production Summary Report	298
Amount of Lab Expenses of Non-Medicaid Procedures for Provider	
RVU Production Summary Report	298
Amount of Lab Expenses of Procedures for Clinic	
RVU Production Summary Report	298
Amount of Lab Expenses of Procedures for Provider	
RVU Production Summary Report	298
Lab Expense	
RVU Schedules Report	302
Fee Schedules Report	122
Lab Expense Amount	
RVU Day Sheet Report	296
Total Amount of Lab Expenses	
RVU Day Sheet Report	296
Total Amount of Lab Expenses of Medicaid Procedures	
RVU Production Summary Report	298
Total Amount of Lab Expenses of Non-Medicaid Procedures	
RVU Production Summary Report	298
Total Amount of Lab Expenses of Procedures	
RVU Production Summary Report	298
Laboratory Test	
Number of Laboratory Tests Ordered	
Meaningful Use Measure Calculation List	156
Number of Laboratory Tests Recorded Using CPOE (Computerized Provider Order Entry)	
Meaningful Use Measure Calculation List	156

Language		Adjustment Summary Report	4
Language		Late Charge Date	
UDS - Patient Status Report	338	Late Charge Report	150
Patient Language		Late Charge Percent or Amount	
Patient List (Filtered)	206	Truth in Lending Disclosure Statement	320
Letter Merge Reports	152	Total Amount of Current Late Charges	
Last Visit Date		Day Sheet (Charges and Receipts) Report	94
Last Visit Date		Total Amount of Late Charges	
Patient List	204	Analysis Summary Report - Daily	8
Patient Notes Report	208	Analysis Summary Report - Standard	12
Patient Route Slip	216	Day Sheet (Adjustments) Report	90
Patient Route Slip	216	Day Sheet Report	100
Letter Merge Reports	152	Late Charge Report	150
Late		Provider A/R Totals - Daily Report	264
Number of Late Appointments		Provider A/R Totals - Standard Report	266
Appointment Statistics Report	20	Adjustment Summary Report	4
Percent Late Appointments		Total Amount of Late Charges for Previous Month	
Appointment Statistics Report	20	Day Sheet (Charges and Receipts) Report	94
Late Charge		Total Amount of MTD Late Charges	
Amount of Current Late Charges for Provider		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Total Amount of YTD Late Charges	
Amount of Late Charges		Day Sheet (Charges and Receipts) Report	94
Provider A/R Totals - Daily Report	264	Total Amount of YTD Late Charges for Family	
Amount of Late Charges (Average)		Family Ledger Report (Single Family)	120
Practice Analysis Report	242	Family Ledger Report	118
Amount of Late Charges (for Date Range)		Total Quantity of Late Charges	
Practice Analysis Report	242	Day Sheet (Adjustments) Report	90
Amount of Late Charges (MTD)		Ledger	
Practice Analysis Report	242	Ledger Balance	
Amount of Late Charges (YTD)		Suspended Credits Report	312
Practice Analysis Report	242	Suspended Amount on Ledger	
Amount of Late Charges for Clinic		Suspended Credits Report	312
Analysis Summary Report - Standard	12	Length	
Day Sheet Report	100	Appointment Length	
Late Charge Report	150	Audit Report - Appointments	26
Analysis Summary Report - Daily	8	Daily Appointment List (DX1)	84
Amount of Late Charges for Previous Month for Provider		Daily Appointment List Report	86
Day Sheet (Charges and Receipts) Report	94	Operatory Appointment List Report	190
Amount of Late Charges for Provider		Unscheduled Appointment List (DX1)	344
Analysis Summary Report - Standard	12	Unscheduled Appointment List (OM)	346
Day Sheet Report	100	As Soon As Possible List	22
Late Charge Report	150	Appointment Length Change	
Provider A/R Totals - Daily Report	264	Audit Report - Appointments	26
Provider A/R Totals - Standard Report	266	Length in Appointment Status	
Analysis Summary Report - Daily	8	Appointment Cycle Time Report	16
Amount of Late Charges YTD		Next Appointment Length	
Walkout - Family Walkout	358	Patient Route Slip	216
Amount of MTD Late Charges for Provider		Total Length in Appointment Statuses	
Day Sheet (Charges and Receipts) Report	94	Appointment Cycle Time Report	16
Amount of YTD Late Charges for Provider		License Number	
Day Sheet (Charges and Receipts) Report	94	Provider License Number	
Average Amount of Late Charges		Walkout - Doctor's Statement	356
Day Sheet (Adjustments) Report	90	Lifetime	
Last Late Charge Amount		Lifetime/Individual/Standard Deductible	
Payment Agreement Report	224	Insurance Carrier List	132
Last Late Charge Date		Lifetime/Individual/Standard Other Deductible	
Payment Agreement Report	224	Insurance Carrier List	132
Late Charge Amount		Lifetime/Individual/Standard Preventative Deductible	
Analysis Summary Report - Daily	8	Insurance Carrier List	132
Analysis Summary Report - Standard	12	Limit	
Late Charge Report	150	Time Limit	
		Insurance Carrier List	132

Lingual

Clinical Attachment Level (Lingual)	
Perio - Exam Comparison Report	232
Perio - Combined Graphic & Data Chart Report	228
Furcation Involvement (Lingual)	
Perio - Exam Comparison Report	232
Perio - Combined Graphic & Data Chart Report	228
Gingival Margin (Lingual)	
Perio - Exam Comparison Report	232
Perio - Combined Graphic & Data Chart Report	228
Mobility (Lingual)	
Perio - Exam Comparison Report	232
Perio - Combined Graphic & Data Chart Report	228
Probing Depth (Lingual)	
Perio - Data Chart Report	230
Perio - Exam Comparison Report	232
Perio - Pocket Depths Only Report	236
Perio - Combined Graphic & Data Chart Report	228

Loan

Loan Amount	
Truth in Lending Disclosure Statement	320

Locked

Clinical Note Status	
Clinical Notes Report	64

Login

Login Name	
Audit Report - Providers/Staff	36
Login Name Change	
Audit Report - Providers/Staff	36

Loss of Attachment

Percent of Patients with Loss of Attachment < 3 mm	
Caries Prevalence and Periodontal Index Report	52
Percent of Patients with Loss of Attachment >= 3 & < 5 mm	
Caries Prevalence and Periodontal Index Report	52
Percent of Patients with Loss of Attachment >= 5 mm	
Caries Prevalence and Periodontal Index Report	52

Major

Insurance Coverage Percent (Major) for Primary Insurance	
Patient Route Slip	216
Insurance Coverage Percent (Major) for Secondary Insurance	
Patient Route Slip	216

Male

Number of Male Patients	
Practice Statistics Report	246
Number of Males	
UDS - Age/Gender Report	322
Number of Males for Clinic	
UDS - Age/Gender Report	322
Number of Males for Provider	
UDS - Age/Gender Report	322

Percent of Male Patients	
Practice Statistics Report	246
Total Number of Males	
UDS - Age/Gender Report	322

Marital Status

Number of Divorced Patients	
Practice Statistics Report	246
Number of Married Patients	
Practice Statistics Report	246
Number of Separated Patients	
Practice Statistics Report	246
Number of Single Patients	
Practice Statistics Report	246
Number of Widowed Patients	
Practice Statistics Report	246
Patient Marital Status	
Insurance Carrier List	132
Letter Merge Reports	152
Patient List	204
Patient Route Slip	216
Employers and Employed Patients Report	116
Percent of Divorced Patients	
Practice Statistics Report	246
Percent of Married Patients	
Practice Statistics Report	246
Percent of Separated Patients	
Practice Statistics Report	246
Percent of Single Patients	
Practice Statistics Report	246
Percent of Widowed Patients	
Practice Statistics Report	246
Subscriber Marital Status	
Insurance Carrier List	132

Married

Number of Married Patients	
Practice Statistics Report	246
Percent of Married Patients	
Practice Statistics Report	246

Material

Material	
RVU Schedules Report	302
Fee Schedules Report	122

Maximum

Maximum Primary Insurance Benefit Amount	
Patient Route Slip	216
Maximum Secondary Insurance Benefit Amount	
Patient Route Slip	216

Mean

Mean dmfs	
Caries Prevalence and Periodontal Index Report	52
Mean dmft	
Caries Prevalence and Periodontal Index Report	52
Mean DMFT	
Caries Prevalence and Periodontal Index Report	52
Mean Number of Sealed Teeth	
Caries Prevalence and Periodontal Index Report	52

Median

Median Wait Time	
Appointment Cycle Time Report	16

Medicaid

Amount of Lab Expenses for Medicaid Procedures for Clinic	
RVU Production Summary Report	298
Amount of Lab Expenses for Medicaid Procedures for Provider	
RVU Production Summary Report	298
Amount of Medicaid Procedures for Clinic	
RVU Production Summary Report	298
Production Summary Report	260
Amount of Medicaid Procedures for Provider	
RVU Production Summary Report	298
Production Summary Report	260
Average Amount of Medicaid Procedures	
RVU Production Summary Report	298
Production Summary Report	260
Average Amount of Medicaid Procedures for Clinic	
RVU Production Summary Report	298
Production Summary Report	260
Average Amount of Medicaid Procedures for Provider	
RVU Production Summary Report	298
Production Summary Report	260
Net RVU for Medicaid Procedures	
RVU Production Summary Report	298
Net RVU of Medicaid Procedures for Clinic	
RVU Production Summary Report	298
Net RVU of Medicaid Procedures for Provider	
RVU Production Summary Report	298
Number of Medicaid and Medicare Patients	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients at Clinic	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients for Provider	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in First Age Group	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in First Age Group at Clinic	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in First Age Group for Provider	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in First Age Group in ZIP Code	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in First Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in Second Age Group	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in Second Age Group at Clinic	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in Second Age Group for Provider	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in Second Age Group in ZIP Code	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in Second Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334
Percent of Medicaid Procedures	
RVU Production Summary Report	298
Production Summary Report	260
Percent of Medicaid Procedures for Clinic	
RVU Production Summary Report	298
Production Summary Report	260
Percent of Medicaid Procedures for Provider	
RVU Production Summary Report	298
Production Summary Report	260
Quantity of Medicaid Procedures for Clinic	
RVU Production Summary Report	298
Production Summary Report	260

Number of Medicaid and Medicare Patients in Second Age Group in ZIP Code	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in Second Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in ZIP Code	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients at Clinic	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients for Provider	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in First Age Group	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in First Age Group at Clinic	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in First Age Group for Provider	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in First Age Group in ZIP Code	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in First Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in Second Age Group	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in Second Age Group at Clinic	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in Second Age Group for Provider	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in Second Age Group in ZIP Code	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in Second Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in ZIP Code	
UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients with Financial Class	
UDS - Medicaid/Medicare Report	334

Medicaid (continued)

Quantity of Medicaid Procedures for Provider	
RVU Production Summary Report	298
Production Summary Report	260
Total Amount of Lab Expenses of Medicaid Procedures	
RVU Production Summary Report	298
Total Amount of Medicaid Payments	
Operator Day Sheet Report	188
Total Amount of Medicaid Procedures	
RVU Production Summary Report	298
Production Summary Report	260
Total Medicaid Charge	
Operator Day Sheet Report	188
Total Number of Patient with Medicaid	
Operator Day Sheet Report	188
Total Quantity of Medicaid Procedures	
RVU Production Summary Report	298
Production Summary Report	260

Medicaid Number

Medicaid Number	
Practice Organization List	244
Provider Medicaid Number	
Provider IDs List	272

Medical

Number of Patients with Dental and Medical Insurance	
Practice Statistics Report	246
Number of Patients with Primary Medical Insurance	
Practice Statistics Report	246
Number of Patients without Dental and Medical Insurance	
Practice Statistics Report	246
Number of Patients without Medical Insurance	
Practice Statistics Report	246
Percent of Patients with Dental and Medical Insurance	
Practice Statistics Report	246
Percent of Patients with Primary Medical Insurance	
Practice Statistics Report	246
Percent of Patients without Dental and Medical Insurance	
Practice Statistics Report	246
Percent of Patients without Medical Insurance	
Practice Statistics Report	246
Primary Medical Insurance Carrier Name	
Patient List	204
Secondary Medical Insurance Carrier Name	
Patient List	204

Medical Alert

Medical Alert	
Patient Route Slip	216
Patient Notes Report	208
Number of Patients with Problems or Attestations of No Known Problems	
Meaningful Use Measure Calculation List	156
Problem Description	
Patient List (Filtered)	206
Problem Discovery Date	
Patient List (Filtered)	206

Medical Code

AMA CPT Code	
Procedure Code List	256
Medical Code List	180

AMA CPT Code Description	
Medical Code List	180
ICD-9-CM Code	
Patient List (Filtered)	206
Medical Code List	180
ICD-9-CM Code Description	
Medical Code List	180
Medical Code	
Procedure Code List	256
Modifier Code	
Medical Code List	180
Modifier Code Description	
Medical Code List	180
Place of Service Code	
Medical Code List	180
Place of Service Code Description	
Medical Code List	180
Type of Service Code	
Medical Code List	180
Type of Service Code Description	
Medical Code List	180

Medical Encounter

Number of Patients 18 - 64 Years with Medical Encounters (with Exclusions)	
Clinical Quality Measures List	66
Number of Patients 18+ Years with Medical Encounters or Patient Health Assessments	
Clinical Quality Measures List	66
Number of Patients 3 - 17 Years with Medical Encounters (with Exclusions)	
Clinical Quality Measures List	66
Number of Patients 65+ Years with Medical Encounters (with Exclusions)	
Clinical Quality Measures List	66

Medical/Other ID

Patient Medical/Other ID	
Patient List	204

Medicare

Number of Medicaid and Medicare Patients	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients at Clinic	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients for Provider	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in First Age Group	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in First Age Group at Clinic	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in First Age Group for Provider	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in First Age Group in ZIP Code	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in First Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334

Medicare (continued)

Number of Medicaid and Medicare Patients in Second Age Group	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in Second Age Group at Clinic	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in Second Age Group for Provider	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in Second Age Group in ZIP Code	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in Second Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in ZIP Code	
UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients at Clinic	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients for Provider	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in First Age Group	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in First Age Group at Clinic	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in First Age Group for Provider	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in First Age Group in ZIP Code	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in First Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in Second Age Group	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in Second Age Group at Clinic	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in Second Age Group for Provider	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in Second Age Group in ZIP Code	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in Second Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in ZIP Code	
UDS - Medicaid/Medicare Report	334
Number of Medicare Patients with Financial Class	
UDS - Medicaid/Medicare Report	334

Medication

Medication Date	
Patient List (Filtered)	206
Medication Description	
Patient List (Filtered)	206
Number of Patients 18+ Years with Current Medications	
Clinical Quality Measures List	66
Number of Patients 66+ Years with 1+ High-risk Medications	
Clinical Quality Measures List	66
Number of Patients 66+ Years with 2+ High-risk Medications	
Clinical Quality Measures List	66
Number of Patients with Medications	
Meaningful Use Measure Calculation List	156
Number of Patients with Medications or Attestations of No Known Medications	
Meaningful Use Measure Calculation List	156
Number of Patients with Medications Ordered Using CPOE (Computerized Provider Order Entry)	
Meaningful Use Measure Calculation List	156
Prescribed Medication	
Prescription Printout	250

Medication Allergy

Number of Patients with Medication Allergies or Attestations of No Known Medication Allergies	
Meaningful Use Measure Calculation List	156

Medication Reconciliation

Number of TCs (Transition of Care) where Medication Reconciliation Was Performed	
Meaningful Use Measure Calculation List	156

Message

Custom Message	
Appointment Reminder Cards	18

Missed Appointment

Last Missed Appointment Date	
Patient Route Slip	216
Number of Missed Appointments	
Patient Route Slip	216

Missed Payment

Number of Missed Payment Agreement Payments	
Practice Analysis Report	242
Number of Missed Payments	
Payment Agreement Report	224
Number of Missed Payments for Payment Agreement	
Collections Manager List	70
Total Number of Missed Payments for Payment Agreements	
Collections Manager List	70

Mobile Number

Patient Mobile Number	
Patient List (Filtered)	206
Patient Questionnaire	214
Patient List	204
Spouse Mobile Number	
Patient Questionnaire	214

Mobility

Mobility	
Perio - Data Chart Report	230
Perio - Combined Graphic & Data Chart Report	228

Mobility (continued)

Mobility (Facial)			
Perio - Exam Comparison Report	232		
Perio - Combined Graphic & Data Chart Report	228		
Mobility (Lingual)			
Perio - Exam Comparison Report	232		
Perio - Combined Graphic & Data Chart Report	228		
Modified			
Modified Procedure			
Audit Report - Combined	32		
Modifier Code			
Modifier Code			
Medical Code List	180		
Modifier Code Description			
Medical Code List	180		
Module			
Module of Access			
Patient Information Accessed Report	200		
Month			
Amount of Applied Credit Adjustments for Previous Month for Provider			
Day Sheet (Charges and Receipts) Report	94		
Amount of Applied Payments for Previous Month for Provider			
Day Sheet (Charges and Receipts) Report	94		
Amount of Charge Adjustments for Previous Month for Provider			
Day Sheet (Charges and Receipts) Report	94		
Day Sheet (Charges and Receipts) Report	94		
Amount of Charges Billed to Insurance for Previous Month for Provider			
Day Sheet (Charges and Receipts) Report	94		
Amount of Charges for Previous Month for Provider			
Day Sheet (Charges and Receipts) Report	94		
Amount of Finance Charges for Previous Month for Provider			
Day Sheet (Charges and Receipts) Report	94		
Amount of Late Charges for Previous Month for Provider			
Day Sheet (Charges and Receipts) Report	94		
Amount of Suspended Credit Adjustments for Previous Month for Provider			
Day Sheet (Charges and Receipts) Report	94		
Amount of Suspended Payments for Previous Month for Provider			
Day Sheet (Charges and Receipts) Report	94		
Average Monthly Charge Amount			
Future Due Payment Plan Report - Monthly Totals	126		
Benefit Renewal Month			
Insurance Carrier List	132		
Fiscal Year Month			
Audit Report - Clinics	30		
Fiscal Year Month Change			
Audit Report - Clinics	30		
Month			
Future Due Payment Plan Report - Monthly Totals	126		
Monthly Charge Amount			
Future Due Payment Plan Report - Standard	128		
Next Charge Amount (after 18 Months from Current Month)			
Future Due Payment Plan Report - Monthly Totals	126		
Number of New Patients (in Month and Year)			
Practice Statistics Report	246		
Number of New Patients from Previous Month			
Day Sheet (Charges and Receipts) Report	94		
Number of New Patients from Previous Month for Provider			
Day Sheet (Charges and Receipts) Report	94		
Number of Patients Due for Prophylaxis (on Month and Year)			
Practice Statistics Report	246		
Number of Referred New Patients (in Month and Year)			
Practice Statistics Report	246		
Percent of Patients Due for Prophylaxis (Month and Year)			
Practice Statistics Report	246		
Percent of Referred New Patients (in Month and Year)			
Practice Statistics Report	246		
Practice Fiscal Year Month			
Registration Information Report	294		
Primary Insurance Benefits Renewal Month			
Patient Route Slip	216		
Primary Insurance Plan Renewal Month			
Unscheduled Treatment Plans (Detailed) Report	350		
Remaining Number of Months			
Future Due Payment Plan Report - Standard	128		
Secondary Insurance Benefits Renewal Month			
Patient Route Slip	216		
Secondary Insurance Plan Renewal Month			
Unscheduled Treatment Plans (Detailed) Report	350		
Total Amount of Applied Credit Adjustments for Previous Month			
Day Sheet (Charges and Receipts) Report	94		
Total Amount of Applied Payments for Previous Month			
Day Sheet (Charges and Receipts) Report	94		
Total Amount of Charge Adjustments for Previous Month			
Day Sheet (Charges and Receipts) Report	94		
Day Sheet (Charges and Receipts) Report	94		
Total Amount of Charges Billed to Insurance for Previous Month			
Day Sheet (Charges and Receipts) Report	94		
Total Amount of Charges for Previous Month			
Day Sheet (Charges and Receipts) Report	94		
Total Amount of Charges Remaining (after 18 Mos from Curr Mo)			
Future Due Payment Plan Report - Monthly Totals	126		
Total Amount of Finance Charges for Previous Month			
Day Sheet (Charges and Receipts) Report	94		
Total Amount of Late Charges for Previous Month			
Day Sheet (Charges and Receipts) Report	94		
Total Amount of Suspended Credit Adjustments for Previous Month			
Day Sheet (Charges and Receipts) Report	94		

Month (continued)

Total Amount of Suspended Payments for Previous Month		Number of New Patients MTD for Provider	
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Charges and Receipts) Report	94
Total Monthly Charges		Number of Patients Seen MTD	
Future Due Payment Plan Report - Standard	128	Day Sheet (Charges and Receipts) Report	94
Total Number of Charges Remaining (after 18 Mos from Curr Mo)		Number of Patients Seen MTD by Provider	
Future Due Payment Plan Report - Monthly Totals	126	Day Sheet (Charges and Receipts) Report	94
MTD		Referred Patients (MTD)	
Amount of Debit Adjustments (MTD)		Practice Analysis Report	242
Practice Analysis Report	242	Subtotal of Charges (MTD)	
Amount of Finance Charges (MTD)		Practice Analysis Report	242
Practice Analysis Report	242	Total Amount of MTD Applied Credit Adjustments	
Amount of Insured Charges (MTD)		Day Sheet (Charges and Receipts) Report	94
Practice Analysis Report	242	Total Amount of MTD Applied Payments	
Amount of Late Charges (MTD)		Day Sheet (Charges and Receipts) Report	94
Practice Analysis Report	242	Total Amount of MTD Charge Adjustments	
Amount of MTD Applied Credit Adjustments for Provider		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Charges and Receipts) Report	94
Amount of MTD Applied Payments for Provider		Total Amount of MTD Charges	
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Charges and Receipts) Report	94
Amount of MTD Charge Adjustments for Provider		Total Amount of MTD Charges Billed to Insurance	
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Total Amount of MTD Finance Charges	
Amount of MTD Charges Billed to Insurance for Provider		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Total Amount of MTD Late Charges	
Amount of MTD Charges for Provider		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Total Amount of MTD Suspended Credit Adjustments	
Amount of MTD Finance Charges for Provider		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Total Amount of MTD Suspended Payments	
Amount of MTD Late Charges for Provider		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Total Charges (MTD)	
Amount of MTD Suspended Credit Adjustments for Provider		Practice Analysis Report	242
Day Sheet (Charges and Receipts) Report	94	Mucogingival Junction	
Amount of MTD Suspended Payments for Provider		Mucogingival Junction	
Day Sheet (Charges and Receipts) Report	94	Perio - Data Chart Report	230
Amount of Non-insured Charges (MTD)		Perio - Combined Graphic & Data Chart Report	228
Practice Analysis Report	242	Multi-Code	
Amount of Other Debit Adjustments (MTD)		Disabled/Enabled	
Practice Analysis Report	242	Multi-Code List	182
Average Charge per Patient MTD		Multi-Code	
Day Sheet (Charges and Receipts) Report	94	Multi-Code List	182
Average Charge per Patient MTD for Provider		Multi-Code Description	
Day Sheet (Charges and Receipts) Report	94	Multi-Code List	182
Average Production per Patient MTD		Multi-Code Type	
Day Sheet (Charges and Receipts) Report	94	Multi-Code List	182
Average Production per Patient MTD for Provider		Name	
Day Sheet (Charges and Receipts) Report	94	Account Holder Name	
Beginning Balance (MTD)		Deposit Slip	108
Practice Analysis Report	242	Cardholder Name	
Ending Balance (MTD)		Credit Card Transaction Report	80
Practice Analysis Report	242	First Name of Referred by Source	
New Patients (MTD)		Letter Merge Reports	152
Practice Analysis Report	242	Guarantor First Name	
Number of New Patients MTD		Letter Merge Reports	152
Day Sheet (Charges and Receipts) Report	94	Guarantor Last Name	
		Letter Merge Reports	152
		Guarantor Name	
		Audit Report - Patients	34
		Billing Statement	48
		Collections Manager List	70
		Family Ledger Report	118
		Family Ledger Report (Single Family)	120

Name (continued)

Finance Charge Report	124	Document Center List	114
Future Due Payment Plan Report - Standard	128	Employers and Employed Patients Report	116
Late Charge Report	150	Family Ledger Report	118
Patient Route Slip	216	Family Ledger Report (Single Family)	120
Patient's Ledger Report	220	Future Due Payment Plan Report - Standard	128
Payment Agreement Amortization Schedule	222	Insurance Carrier List	132
Payment Agreement Report	224	Insurance Carrier Production - Full Report	136
Suspended Credits Report	312	Insurance Claim Aging Report	140
Treatment Plan Approval Report	316	Insurance Claims Not Sent Report	142
Treatment Plan Approval Status Report	318	Insurance Eligibility Report	146
Truth in Lending Disclosure Statement	320	Insurance Transaction Analysis Report	148
Walkout - Family Walkout	358	New Patient List	184
Aging/Credit Balance Report	6	Operator Day Sheet Report	188
Guarantor Name Change		Operatory Appointment List Report	190
Audit Report - Patients	34	Patient Chart and Progress Notes Printout	194
Insurance Carrier Contact Name		Patient Chart Printout	196
Provider IDs List	272	Patient Health Assessment Report	198
Insurance Carrier List	132	Patient Information Accessed Report	200
Last Name of Referred by Source		Patient Ledger Report	202
Letter Merge Reports	152	Patient Ledger Report	202
Last Referral Name and Date		Patient List	204
Patient Route Slip	216	Patient List (Filtered)	206
Last Referred To Name and Date		Patient Notes Report	208
Patient Route Slip	216	Patient Proposed Treatment Case Report (Your Care Plan)	212
Middle Initial of Referred by Source		Patient Questionnaire	214
Letter Merge Reports	152	Patient Route Slip	216
Name on Credit Card		Patient Route Slip	216
Billing Statement	48	Patient Treatment Case Report	218
Paid in by Name		Patient's Ledger Report	220
Deposit Slip	108	Patient's Ledger Report	220
Patient First Name		Perio - Combined Graphic & Data Chart Report	228
Letter Merge Reports	152	Perio - Data Chart Report	230
Patient Last Name		Perio - Exam Comparison Report	232
Letter Merge Reports	152	Perio - Graphic Chart Report	234
Patient Middle Initial		Perio - Pocket Depths Only Report	236
Letter Merge Reports	152	Perio Exam List	238
Patient Name		Practice Treatment Case Report	248
Appointment Cycle Time Report	16	Prescription Printout	250
Appointment Reminder Cards	18	Pre-Treatment Estimate Aging Report	252
As Soon As Possible List	22	Pre-Treatment Estimates Not Sent Report	254
Audit Report - Appointments	26	Procedures Not Attached to Insurance Report	258
Audit Report - Combined	32	Production Summary Report	260
Audit Report - Patients	34	Provider Revenue - Allocations Report	274
Audit Report - Transactions	38	Provider Revenue - Charges Report	276
Billing Statement	48	Provider Revenue - Credits Report	278
Birthday List	50	Referral Recap Report	284
Clinical Notes Report	64	Referral Slip	286
Continuing Care Cards - No Appointment	74	Referred By Doctor/Other Report	288
Continuing Care Cards - with Appointment	75	RVU Day Sheet Report	296
Continuing Care Display List	76	RVU Production Summary Report	298
Coupon Book - Future Due Payments	78	RVU Utilization Report	304
Coupon Book - Payment Agreements	79	Secondary Insurance Claims Not Created Report	306
Daily Appointment List (DX1)	84	Secondary Pre-Treatment Estimates Not Created Report	308
Daily Appointment List Report	86	Suspended Credits Report	312
Day Sheet (Adjustments) Report	90	Treatment Case Report	314
Day Sheet (Charges and Receipts) Report	94	Treatment Plan Approval Report	316
Day Sheet (Receipts) Report	98	Treatment Plan Approval Status Report	318
Day Sheet Report	100	UDS - Age/Gender Report	322
Dental Encounters Report	106		
Document Center Document	112		

Name (continued)

UDS - Insurance Financial Class Report	330
UDS - Insurance Financial Class Report (2013)	332
UDS - Medicaid/Medicare Report	334
UDS - Patient Related Revenue Report	336
UDS - Patient Status Report	338
UDS - Sealant Statistics Report	340
UDS - Tobacco Use and Intervention Report	342
Unscheduled Appointment List (DX1)	344
Unscheduled Appointment List (OM)	346
Unscheduled Treatment Plans (Condensed) Report	348
Unscheduled Treatment Plans (Detailed) Report	350
Utilization Report	354
Walkout - Doctor's Statement	356
Walkout - Family Walkout	358
Appointment Book View Printout	14
Patient Name Change	
Audit Report - Patients	34
Audit Report - Transactions	38
Audit Report - Appointments	26
Patient Name on Appointment	
Letter Merge Reports	152
Patient's Preferred Name	
Letter Merge Reports	152
Appointment Book View Printout	14
Practice Name	
Billing Statement	48
Continuing Care Cards - No Appointment	74
Continuing Care Cards - with Appointment	75
Coupon Book - Future Due Payments	78
Coupon Book - Payment Agreements	79
Letter Merge Reports	152
Perio - Combined Graphic & Data Chart Report	228
Prescription Printout	250
Truth in Lending Disclosure Statement	320
Walkout - Family Walkout	358
Appointment Reminder Cards	18
Provider Name	
Audit Report - Providers/Staff	36
Document Center Document	112
Insurance Carrier List	132
Letter Merge Reports	152
Patient Chart and Progress Notes Printout	194
Patient Chart Printout	196
Patient Treatment Case Report	218
Perio - Combined Graphic & Data Chart Report	228
Perio - Exam Comparison Report	232
Perio - Graphic Chart Report	234
Practice Organization List	244
Practice Statistics Report	246
Prescription Printout	250
Provider IDs List	272
Referral Recap Report	284
Referral Slip	286
Treatment Case Report	314
Walkout - Doctor's Statement	356
Appointment Reminder Cards	18
Provider Name Change	
Audit Report - Providers/Staff	36
Referral Name	
Referral Slip	286
Referral Recap Report	284
Referral Source Name	
Patient Questionnaire	214
Referred by Doctor/Other Name	
Referred By Doctor/Other Report	288
Document Center Document	112
Referred By Name	
New Patient List	184
Referred by Patient Name	
Document Center Document	112
Referred Patient Name	
Referred To Doctor Report	292
Referred to Doctor Name	
Referred To Doctor Report	292
Document Center Document	112
Referred to First Name	
Letter Merge Reports	152
Referred to Last Name	
Letter Merge Reports	152
Referred to Middle Initial	
Letter Merge Reports	152
Referring Patient Name	
Referred By Patient Report	290
Signer Name	
Treatment Case Report	314
Spouse Name	
Patient Questionnaire	214
Subscriber Name for Primary Insurance	
Patient Route Slip	216
Patient Questionnaire	214
Subscriber Name for Secondary Insurance	
Patient Route Slip	216
Patient Questionnaire	214
Net	
Net Difference of Current Charges and Fee Schedule for Provider	
Day Sheet (Charges and Receipts) Report	94
Net Difference of Total Current Charges and Fee Schedule	
Day Sheet (Charges and Receipts) Report	94
Net RVU	
RVU Day Sheet Report	296
Net RVU for Clinic	
RVU Day Sheet Report	296
Net RVU for Medicaid Procedures	
RVU Production Summary Report	298
Net RVU for Provider	
RVU Day Sheet Report	296
Net RVU of Medicaid Procedures for Clinic	
RVU Production Summary Report	298
Net RVU of Medicaid Procedures for Provider	
RVU Production Summary Report	298
Net RVU of Non-Medicaid Procedures	
RVU Production Summary Report	298
Net RVU of Non-Medicaid Procedures for Clinic	
RVU Production Summary Report	298
Net RVU of Non-Medicaid Procedures for Provider	
RVU Production Summary Report	298

Net (continued)

Net RVU of Procedures	
RVU Production Summary Report	298
Net RVU of Procedures for Clinic	
RVU Production Summary Report	298
Net RVU of Procedures for Provider	
RVU Production Summary Report	298
Total Net RVU	
RVU Day Sheet Report	296

Net Change

Amount of Net Change	
Provider A/R Totals - Daily Report	264
Amount of Net Change for Clinic	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Amount of Net Change for Provider	
Analysis Summary Report - Standard	12
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Analysis Summary Report - Daily	8
Net Change	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Net Change in Balance	
Day Sheet (Charges and Receipts) Report	94
Net Change in Balance for Provider	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Net Change	
Analysis Summary Report - Standard	12
Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266
Analysis Summary Report - Daily	8

New Appointment

Number of New Appointments	
Daily Summary Report	88

New Family

Number of New Families	
Daily Summary Report	88

New Head of House

Number of New Families	
Daily Summary Report	88

New Patient

Current Number of New Patients	
Day Sheet (Charges and Receipts) Report	94
Current Number of New Patients for Provider	
Day Sheet (Charges and Receipts) Report	94
New Patients (Average)	
Practice Analysis Report	242
New Patients (for Date Range)	
Practice Analysis Report	242
New Patients (MTD)	
Practice Analysis Report	242
New Patients (YTD)	
Practice Analysis Report	242
Number of New Families	
Daily Summary Report	88
Number of New Patients	
Analysis Summary Report - Standard	12
Daily Summary Report	88
Analysis Summary Report - Daily	8

Number of New Patients (in Month and Year)	
Practice Statistics Report	246
Number of New Patients for Clinic	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Number of New Patients for Provider	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Number of New Patients from Previous Month	
Day Sheet (Charges and Receipts) Report	94
Number of New Patients from Previous Month for Provider	
Day Sheet (Charges and Receipts) Report	94
Number of New Patients MTD	
Day Sheet (Charges and Receipts) Report	94
Number of New Patients MTD for Provider	
Day Sheet (Charges and Receipts) Report	94
Number of New Patients YTD	
Day Sheet (Charges and Receipts) Report	94
Number of New Patients YTD for Provider	
Day Sheet (Charges and Receipts) Report	94
Number of New-patient Encounters	
Meaningful Use Measure Calculation List	156
Number of Referred New Patients (in Month and Year)	
Practice Statistics Report	246
Percent of Referred New Patients (in Month and Year)	
Practice Statistics Report	246
Total Active New Patients	
New Patient List	184
Total Archived New Patients	
New Patient List	184
Total Inactive New Patients	
New Patient List	184
Total New Patients	
New Patient List	184
Total Non-patient New Patients	
New Patient List	184
Total Number of New Patients	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Number of New Patients for Clinic	
Day Sheet Report	100
Total Number of New Patients for Provider	
Day Sheet Report	100

Non-guarantor

Number of Patient Non-guarantors	
Practice Statistics Report	246
Percent of Patient Non-guarantors	
Practice Statistics Report	246

Non-insurance

Revenue for Provider from Non-insurance Sources	
Provider Revenue - Charges Report	276
Provider Revenue - Credits Report	278
Provider Revenue - Summary Report	280
Provider Revenue - Allocations Report	274
Total Revenue from Non-insurance	
Provider Revenue - Charges Report	276
Provider Revenue - Credits Report	278
Provider Revenue - Summary Report	280
Provider Revenue - Allocations Report	274

Non-insured

Amount of Non-insured Charges (Average) Practice Analysis Report	242
Amount of Non-insured Charges (for Date Range) Practice Analysis Report	242
Amount of Non-insured Charges (MTD) Practice Analysis Report	242
Amount of Non-insured Charges (YTD) Practice Analysis Report	242

Non-Medicaid

Amount of Lab Expenses of Non-Medicaid Procedures for Clinic RVU Production Summary Report	298
Amount of Lab Expenses of Non-Medicaid Procedures for Provider RVU Production Summary Report	298
Amount of Non-Medicaid Procedures for Clinic RVU Production Summary Report Production Summary Report	260
Amount of Non-Medicaid Procedures for Provider RVU Production Summary Report Production Summary Report	260
Average Amount of Non-Medicaid Procedures RVU Production Summary Report Production Summary Report	260
Average Amount of Non-Medicaid Procedures for Clinic RVU Production Summary Report Production Summary Report	260
Average Amount of Non-Medicaid Procedures for Provider RVU Production Summary Report Production Summary Report	260
Net RVU of Non-Medicaid Procedures RVU Production Summary Report	298
Net RVU of Non-Medicaid Procedures for Clinic RVU Production Summary Report	298
Net RVU of Non-Medicaid Procedures for Provider RVU Production Summary Report	298
Percent of Non-Medicaid Procedures RVU Production Summary Report Production Summary Report	260
Percent of Non-Medicaid Procedures for Clinic RVU Production Summary Report Production Summary Report	260
Percent of Non-Medicaid Procedures for Provider RVU Production Summary Report Production Summary Report	260
Quantity of Non-Medicaid Procedures for Clinic RVU Production Summary Report Production Summary Report	260
Quantity of Non-Medicaid Procedures for Provider RVU Production Summary Report Production Summary Report	260
Total Amount of Lab Expenses of Non-Medicaid Procedures RVU Production Summary Report	298
Total Amount of Non-Medicaid Procedures RVU Production Summary Report Production Summary Report	260
Total Quantity of Non-Medicaid Procedures RVU Production Summary Report Production Summary Report	260

Non-patient

Number of Non-patient Guarantors Practice Statistics Report	246
Percent of Non-patient Guarantors Practice Statistics Report	246

Not Created

Total Amount of Secondary Claims not Created Secondary Insurance Claims Not Created Report	306
---	-----

Not Sent

Total Amount of Pre-treatment Estimates not Sent Pre-Treatment Estimates Not Sent Report	254
Total Amount of Primary and Secondary Claims not Sent Insurance Claims Not Sent Report	142
Total Amount of Primary Claims not Sent Insurance Claims Not Sent Report	142
Total Amount of Primary Pre-treatment Estimates not Sent Pre-Treatment Estimates Not Sent Report	254
Total Amount of Secondary Claims not Sent Insurance Claims Not Sent Report	142
Total Amount of Secondary Pre-treatment Estimates not Created Secondary Pre-Treatment Estimates Not Created Report	308
Total Amount of Secondary Pre-treatment Estimates not Sent Pre-Treatment Estimates Not Sent Report	254

Note

Account Note Collections Manager List	70
Appointment Note Patient Notes Report	208
Appointment Notes Appointment Book View Printout	14
Clinical Note Patient Notes Report Patient Chart and Progress Notes Printout	194
Clinical Note Clinic Clinical Notes Report	64
Clinical Note Date Patient Notes Report Clinical Notes Report	64
Clinical Note Number Clinical Notes Report	64
Clinical Note Page Number Clinical Notes Report	64
Clinical Note Provider Clinical Notes Report	64
Clinical Note Text Clinical Notes Report	64
Clinical Note Time Clinical Notes Report	64
Continuing Care Note Patient Notes Report Letter Merge Reports	152
Continuing Care Note Continuing Care Due Date Patient Notes Report	208
Continuing Care Note Continuing Care Type Patient Notes Report	208
Custom Message Appointment Reminder Cards	18

Note (continued)

Custom Note		Provider NPI Number	
Walkout - Family Walkout	358	Provider IDs List	272
Walkout - Doctor's Statement	356	Prescription Printout	250
Custom Notes		Rendering Provider NPI Number	
Custom Practice Information Report	82	Dental Encounters Report	106
Day Note		Number	
Appointment Book View Printout	14	Clinical Note Number	
Family Alert Note		Clinical Notes Report	64
Patient Notes Report	208	Number	
Guarantor Note		UDS - Insurance Financial Class Report	330
Patient Notes Report	208	UDS - Insurance Financial Class Report	330
Aging/Credit Balance Report	6	UDS - Insurance Financial Class Report	330
Insurance Claim Note		Patient Home Phone Number	
Patient Notes Report	208	As Soon As Possible List	22
Insurance Plan Note		Clinical Notes Report	64
Patient Notes Report	208	Continuing Care Display List	76
Lab Case Note		Daily Appointment List (DX1)	84
Patient Notes Report	208	Daily Appointment List Report	86
Last Payment Agreement Note		Day Sheet (Charges and Receipts) Report	94
Payment Agreement Report	224	Day Sheet Report	100
Next Appointment Note		Letter Merge Reports	152
Patient Route Slip	216	Patient Ledger Report	202
Note		Patient List	204
Document Center List	114	Patient List (Filtered)	206
Number of Patients with Searchable Clinical Notes		Patient Notes Report	208
Meaningful Use Measure Calculation List	156	Patient Questionnaire	214
Patient Alert Note		Patient Route Slip	216
Patient Notes Report	208	Prescription Printout	250
Patient Note		Referral Recap Report	284
Patient Route Slip	216	Referral Slip	286
Patient Notes Report	208	Treatment Plan Approval Report	316
Payment Plan Note		Treatment Plan Approval Status Report	318
Patient Notes Report	208	Unscheduled Appointment List (DX1)	344
Perio Exam Note		Unscheduled Appointment List (OM)	346
Patient Notes Report	208	Unscheduled Treatment Plans (Condensed) Report	348
Prescription Note		Unscheduled Treatment Plans (Detailed) Report	350
Prescription Printout	250	Appointment Book View Printout	14
Procedure Note		Payment Agreement Payment Number	
Treatment Case Report	314	Payment Agreement Amortization Schedule	222
Treatment Plan Approval Report	316	Payment Number	
Treatment Plan Approval Status Report	318	Coupon Book - Payment Agreements	79
Patient Chart and Progress Notes Printout	194	Coupon Book - Future Due Payments	78
Referral Note		Numerator Code	
Referral Slip	286	Numerator Codes for Provider	
Referral Recap Report	284	Oral Health Education Report	192
Statement Note		Periodontal Exam Report	240
Patient Notes Report	208	Initial Health History Report	130
Note Status		Total Numerator Codes for All Clinics	
Clinical Note Status		Oral Health Education Report	192
Clinical Notes Report	64	Periodontal Exam Report	240
Notes		Initial Health History Report	130
Case Notes		Total Numerator Codes for Clinic	
Treatment Case Report	314	Oral Health Education Report	192
Patient Treatment Case Report	218	Periodontal Exam Report	240
NPI Number		Initial Health History Report	130
Insurance Plan Group NPI Number		Nutrition Counseling	
Dental Encounters Report	106	Number of Patients 3 - 17 Years who Received Nutrition Counseling	
NPI Number		Clinical Quality Measures List	66
Practice Organization List	244		

Office

Amount of Office Portion	
Patient Treatment Case Report	218
Amount of Office Portion for Case	
Patient Treatment Case Report	218
Amount of Office Portion for Visit	
Patient Treatment Case Report	218
Number of Office Visits	
Meaningful Use Measure Calculation List	156
Number of Office Visits where Patient Received CS (Clinical Summary)	
Meaningful Use Measure Calculation List	156
Provider Office Phone Number	
Provider IDs List	272

Office Journal

Office Journal Entry	
Office Journal Report	186
Office Journal Entry Date	
Office Journal Report	186
Office Journal Entry Information	
Office Journal Report	186
Office Journal Entry Time	
Office Journal Report	186
Previous Office Journal Entry	
Collections Manager List	70
Previous Office Journal Type	
Collections Manager List	70

Office Journal Type

Previous Office Journal Type	
Collections Manager List	70

Office Phone

Office Number	
Practice Organization List	244

Office Portion

Amount of Office Portion	
Patient Treatment Case Report	218
Amount of Office Portion for Case	
Patient Treatment Case Report	218
Amount of Office Portion for Visit	
Patient Treatment Case Report	218

Office Visit

Number of Office Visits for Insurance Carrier	
Utilization Report	354
RVU Utilization Report	304
Total Number of Office Visits	
Utilization Report	354
RVU Utilization Report	304

On Hold

Claim On Hold Date	
Insurance Claim Aging Report	140
Pre-treatment Estimate On Hold Date	
Pre-Treatment Estimate Aging Report	252

On Time

Number of On Time Appointments	
Appointment Statistics Report	20

On-Patient

Total Non-patient New Patients	
New Patient List	184

Operator

Operator	
Deposit Slip	108
Appointment Book View Printout	14
Operator ID	
Day Sheet (Receipts) Report	98
Day Sheet (Adjustments) Report	90
Total Amount of Payment Type for Operator	
Deposit Slip	108
Total Number of Payment Type Items for Operator	
Deposit Slip	108

Operatory

Next Appointment Operatory ID	
Patient Route Slip	216
Operatory	
Audit Report - Appointments	26
Appointment Book View Printout	14
Operatory Change	
Audit Report - Appointments	26
Operatory ID	
Daily Appointment List (DX1)	84
Daily Appointment List Report	86
Operatory Appointment List Report	190
As Soon As Possible List	22

Option

Audit Log Option	
Audit Report - Audit Log Status	28

Order

Number of Diagnostic Imaging Orders Recorded Using CPOE (Computerized Provider Order Entry)	
Meaningful Use Measure Calculation List	156
Number of Laboratory Tests Ordered	
Meaningful Use Measure Calculation List	156
Number of Prescriptions Ordered	
Meaningful Use Measure Calculation List	156
Number of Prescriptions Ordered Using CPOE (Computerized Provider Order Entry)	
Meaningful Use Measure Calculation List	156
Number of Radiology Orders	
Meaningful Use Measure Calculation List	156
Number of Radiology Orders Recorded Using CPOE (Computerized Provider Order Entry)	
Meaningful Use Measure Calculation List	156

Orthodontics

Insurance Coverage Percent (Orthodontics) for Primary Insurance	
Patient Route Slip	216
Insurance Coverage Percent (Orthodontics) for Secondary Insurance	
Patient Route Slip	216

Other

Amount of Other Applied Credit Adjustments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Other Applied Credit Adjustments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8

Other (continued)

Amount of Other Applied Credit Initial Balances for Clinic		Amount of Other Deductible Owed to Secondary Insurance	
Day Sheet Report	100	Patient Route Slip	216
Amount of Other Applied Credit Initial Balances for Provider		Lifetime/Individual/Standard Other Deductible	
Day Sheet Report	100	Insurance Carrier List	132
Amount of Other Applied Credit Special Adjustments for Clinic		Number of Other Gender	
Day Sheet Report	100	UDS - Age/Gender Report	322
Amount of Other Applied Credit Special Adjustments for Provider		Number of Other Gender for Clinic	
Day Sheet Report	100	UDS - Age/Gender Report	322
Amount of Other Applied Insurance Payments for Clinic		Number of Other Gender for Provider	
Analysis Summary Report - Standard	12	UDS - Age/Gender Report	322
Day Sheet Report	100	Number of Other Patients	
Analysis Summary Report - Daily	8	Practice Statistics Report	246
Amount of Other Applied Insurance Payments for Provider		Other Applied Credit Adjustment Amount	
Analysis Summary Report - Standard	12	Analysis Summary Report - Standard	12
Day Sheet Report	100	Analysis Summary Report - Daily	8
Analysis Summary Report - Daily	8	Other Applied Insurance Payment Amount	
Amount of Other Applied Payments for Clinic		Analysis Summary Report - Standard	12
Analysis Summary Report - Standard	12	Analysis Summary Report - Daily	8
Day Sheet Report	100	Other Applied Payment	
Analysis Summary Report - Daily	8	Analysis Summary Report - Standard	12
Amount of Other Applied Payments for Provider		Other Applied Payment Amount	
Analysis Summary Report - Standard	12	Analysis Summary Report - Daily	8
Day Sheet Report	100	Other Credit Initial Balance	
Analysis Summary Report - Daily	8	Analysis Summary Report - Standard	12
Amount of Other Credit Initial Balances for Clinic		Analysis Summary Report - Daily	8
Analysis Summary Report - Standard	12	Other Credit Special Adjustment Amount	
Analysis Summary Report - Daily	8	Analysis Summary Report - Standard	12
Amount of Other Credit Initial Balances for Provider		Analysis Summary Report - Daily	8
Analysis Summary Report - Standard	12	Other Deductible Met	
Analysis Summary Report - Daily	8	Insurance Carrier List	132
Amount of Other Credit Special Adjustments for Clinic		Other Deductible Owed by Family to Primary Insurance	
Analysis Summary Report - Standard	12	Treatment Case Report	314
Analysis Summary Report - Daily	8	Other Deductible Owed by Family to Secondary Insurance	
Amount of Other Credit Special Adjustments for Provider		Treatment Case Report	314
Analysis Summary Report - Standard	12	Other Deductible Owed by Patient to Primary Insurance	
Analysis Summary Report - Daily	8	Treatment Case Report	314
Amount of Other Credit Special Adjustments for Provider		Patient Treatment Case Report	218
Analysis Summary Report - Standard	12	Other Deductible Owed by Patient to Secondary Insurance	
Analysis Summary Report - Daily	8	Treatment Case Report	314
Amount of Other Debit Adjustments (Average)		Patient Treatment Case Report	218
Practice Analysis Report	242	Percent of Other Patients	
Amount of Other Debit Adjustments (for Date Range)		Practice Statistics Report	246
Practice Analysis Report	242	Total Amount of Other Applied Credit Adjustments	
Amount of Other Debit Adjustments (MTD)		Analysis Summary Report - Standard	12
Practice Analysis Report	242	Day Sheet Report	100
Amount of Other Debit Adjustments (YTD)		Analysis Summary Report - Daily	8
Practice Analysis Report	242	Total Amount of Other Applied Credit Initial Balances	
Amount of Other Deductible Owed by Family to Primary Insurance		Day Sheet Report	100
Patient Route Slip	216	Total Amount of Other Applied Credit Special Adjustments	
Amount of Other Deductible Owed by Family to Secondary Insurance		Day Sheet Report	100
Patient Route Slip	216	Total Amount of Other Applied Insurance Payments	
Amount of Other Deductible Owed to Primary Insurance		Analysis Summary Report - Standard	12
Patient Route Slip	216	Day Sheet Report	100
		Analysis Summary Report - Daily	8
		Total Amount of Other Applied Payments	
		Analysis Summary Report - Standard	12
		Day Sheet Report	100
		Analysis Summary Report - Daily	8

Other (continued)

Total Amount of Other Credit Initial Balances	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Total Amount of Other Credit Special Adjustments	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Total Number of Other Gender	
UDS - Age/Gender Report	322
Other ID	
Other ID	
Audit Report - Patients	34
Other ID Change	
Audit Report - Patients	34
Patient Other ID	
Patient List (Filtered)	206
Letter Merge Reports	152
Other Number	
Patient Other Number	
Patient Questionnaire	214
Patient List	204
Spouse Other Number	
Patient Questionnaire	214
Other Payment	
Subtotal of Other Retroactive Payment Amount Collected for Financial Class Type	
UDS - Patient Related Revenue Report	336
Subtotal of Other Retroactive Payment Amount Collected for Payer Category	
UDS - Patient Related Revenue Report	336
Total Other Retroactive Payment Amount Collected for Financial Class Type	
UDS - Patient Related Revenue Report	336
Total Other Retroactive Payment Amount Collected for Patient	
UDS - Patient Related Revenue Report	336
Total Other Retroactive Payment Amount Collected for Payer Category	
UDS - Patient Related Revenue Report	336
Outpatient Visit	
Number of Patients 18 - 85 Years with Outpatient Visits (with Exclusions)	
Clinical Quality Measures List	66
Number of Patients 3 - 17 Years with Outpatient Visits (with Exclusions)	
Clinical Quality Measures List	66
Outstanding	
Outstanding Primary Insurance Estimated Amount	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Outstanding Secondary Insurance Estimated Amount	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Override	
Overriding User	
Audit Report - Clinics	30
Audit Report - Combined	32
Audit Report - Patients	34
Audit Report - Providers/Staff	36
Audit Report - Transactions	38
Audit Report - Appointments	26

Owed

Amount of Other Deductible Owed by Family to Primary Insurance	
Patient Route Slip	216
Amount of Other Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Amount of Other Deductible Owed to Primary Insurance	
Patient Route Slip	216
Amount of Other Deductible Owed to Secondary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed by Family to Primary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed to Primary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed to Secondary Insurance	
Patient Route Slip	216
Amount of Standard Deductible Owed by Family to Primary Insurance	
Patient Route Slip	216
Amount of Standard Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Amount of Standard Deductible Owed to Primary Insurance	
Patient Route Slip	216
Amount of Standard Deductible Owed to Secondary Insurance	
Patient Route Slip	216
Other Deductible Owed by Family to Primary Insurance	
Treatment Case Report	314
Other Deductible Owed by Family to Secondary Insurance	
Treatment Case Report	314
Other Deductible Owed by Patient to Primary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218
Other Deductible Owed by Patient to Secondary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218
Preventative Deductible Owed by Family to Primary Insurance	
Treatment Case Report	314
Preventative Deductible Owed by Family to Secondary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218
Preventative Deductible Owed by Patient to Primary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218
Preventative Deductible Owed by Patient to Secondary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218

Owed (continued)

Standard Deductible Owed by Family to Primary Insurance	
Treatment Case Report	314
Standard Deductible Owed by Family to Secondary Insurance	
Treatment Case Report	314
Standard Deductible Owed by Patient to Primary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218
Standard Deductible Owed by Patient to Secondary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218

Page

Clinical Note Page Number	
Clinical Notes Report	64
Number of Pages	
Document Center List	114

Paid

Amount of Primary Insurance Paid Benefits YTD for Family	
Treatment Case Report	314

Paid in by

Paid in by Name	
Deposit Slip	108

Paint Type

Paint Type	
Procedure Code List	256
Dental Diagnostic Code List	104

Participating Provider

Number of Participating Providers	
Insurance Carrier List	132

Past Due

Payment Agreement Amount Past Due	
Payment Agreement Report	224
Total Amount of Payment Agreement Payments Past Due	
Payment Agreement Report	224

Patient

Accessed Patient Information	
Audit Report - Combined	32
Address of Patient on Appointment	
Letter Merge Reports	152
Amount Collected for Patient	
UDS - Patient Related Revenue Report	336
Amount of Allowances for Patient	
UDS - Patient Related Revenue Report	336
Amount of Annual Primary Insurance Plan Benefits for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Annual Secondary Insurance Plan Benefits for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Bad Debt Write-offs for Patient	
UDS - Patient Related Revenue Report	336
Amount of Charges for Patient	
UDS - Patient Related Revenue Report	336

Amount of Completed Procedures for Patient	
Procedures Not Attached to Insurance Report	258
Amount of Estimated Primary Insurance Benefits Remaining YTD for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Estimated Secondary Insurance Benefits Remaining YTD for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Patient Portion	
Patient Treatment Case Report	218
Practice Treatment Case Report	248
Treatment Case Report	314
Patient Chart Printout	196
Amount of Patient Portion for Case	
Practice Treatment Case Report	248
Patient Treatment Case Report	218
Amount of Patient Portion for Visit	
Practice Treatment Case Report	248
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Pending Estimated Primary Insurance Portions YTD for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Pending Estimated Secondary Insurance Portions YTD for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Primary Insurance Paid Benefits YTD for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Secondary Paid Benefits for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Sliding Discounts for Patient	
UDS - Patient Related Revenue Report	336
Average Charge per Patient	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Average Charge per Patient for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Average Charge per Patient for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Average Charge per Patient MTD	
Day Sheet (Charges and Receipts) Report	94
Average Charge per Patient MTD for Provider	
Day Sheet (Charges and Receipts) Report	94
Average Production per Patient	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Average Production per Patient at Clinic from Referral Source	
Referral Analysis Report	282

Patient (continued)

Average Production per Patient for Clinic		Financial Class Type	
Analysis Summary Report - Standard	12	UDS - Patient Related Revenue Report	336
Day Sheet Report	100	UDS - Insurance Financial Class Report	330
Analysis Summary Report - Daily	8	Gender Identity	
Average Production per Patient for Provider		UDS - Patient Status Report	338
Analysis Summary Report - Standard	12	Grand Total Amount of Patient Payments Received	
Day Sheet Report	100	Insurance Transaction Analysis Report	148
Analysis Summary Report - Daily	8	Grand Total Number of Patient Payments Received	
Average Production Per Patient from Referral Source		Insurance Transaction Analysis Report	148
Referral Analysis Report	282	Homeless Status	
Average Production Per Patient from Referral Sources		UDS - Patient Status Report	338
Referral Analysis Report	282	Housing Status	
Average Production per Patient MTD		UDS - Patient Status Report	338
Day Sheet (Charges and Receipts) Report	94	Language	
Average Production per Patient MTD for Provider		UDS - Patient Status Report	338
Day Sheet (Charges and Receipts) Report	94	Number of Active Patient Guarantors	
Best Time to Call Patient		Practice Statistics Report	246
Patient Questionnaire	214	Number of Active Patients	
Birth Date		Practice Statistics Report	246
Insurance Claim Aging Report	140	Practice Analysis Report	242
Insurance Eligibility Report	146	Number of Charts Sampled	
Insurance Transaction Analysis Report	148	UDS - Sealant Statistics Report	340
Letter Merge Reports	152	Number of Divorced Patients	
Birthday List	50	Practice Statistics Report	246
Chart Number		Number of Female Patients	
Appointment Cycle Time Report	16	Practice Statistics Report	246
Patient's Ledger Report	220	Number of Insured Active Patients	
Appointment Book View Printout	14	Practice Analysis Report	242
Current Average Charge per Patient		Number of Insured Patients	
Day Sheet (Charges and Receipts) Report	94	Insurance Carrier List	132
Current Average Charge per Patient for Provider		Number of Male Patients	
Day Sheet (Charges and Receipts) Report	94	Practice Statistics Report	246
Current Average Production per Patient		Number of Married Patients	
Day Sheet (Charges and Receipts) Report	94	Practice Statistics Report	246
Current Average Production per Patient for Provider		Number of Medicaid and Medicare Patients	
Day Sheet (Charges and Receipts) Report	94	UDS - Medicaid/Medicare Report	334
Current Number of Patients Seen		Number of Medicaid and Medicare Patients at Clinic	
Day Sheet (Charges and Receipts) Report	94	UDS - Medicaid/Medicare Report	334
Current Number of Patients Seen by Provider		Number of Medicaid and Medicare Patients for Pro- vider	
Day Sheet (Charges and Receipts) Report	94	UDS - Medicaid/Medicare Report	334
Employer Address (for Patient)		Number of Medicaid and Medicare Patients in First Age Group	
Patient Questionnaire	214	UDS - Medicaid/Medicare Report	334
Employer Name (for Patient)		Number of Medicaid and Medicare Patients in First Age Group at Clinic	
Patient Questionnaire	214	UDS - Medicaid/Medicare Report	334
Estimated Amount of Patient's Portion		Number of Medicaid and Medicare Patients in First Age Group for Provider	
Patient Treatment Case Report	218	UDS - Medicaid/Medicare Report	334
Treatment Case Report	314	Number of Medicaid and Medicare Patients in First Age Group in ZIP Code	
Patient Proposed Treatment Case Report (Your Care Plan)	212	UDS - Medicaid/Medicare Report	334
Estimated Patient Portion		Number of Medicaid and Medicare Patients in First Age Group with Financial Class	
Patient Route Slip	216	UDS - Medicaid/Medicare Report	334
Ethnicity		Number of Medicaid and Medicare Patients in Second Age Group	
UDS - Patient Status Report	338	UDS - Medicaid/Medicare Report	334
Exported Patient Health Information		Number of Medicaid and Medicare Patients in Second Age Group at Clinic	
Audit Report - Combined	32	UDS - Medicaid/Medicare Report	334
Financial Class		UDS - Medicaid/Medicare Report	334
UDS - Insurance Financial Class Report (2013)	332	Number of Medicaid and Medicare Patients in Second Age Group at Clinic	
UDS - Medicaid/Medicare Report	334	UDS - Medicaid/Medicare Report	334
UDS - Patient Status Report	338		
Insurance Carrier List	132		

Patient (continued)

Number of Medicaid and Medicare Patients in Second Age Group for Provider		Number of Medicare Patients in First Age Group	
UDS - Medicaid/Medicare Report	334	UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in Second Age Group in ZIP Code		Number of Medicare Patients in First Age Group at Clinic	
UDS - Medicaid/Medicare Report	334	UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in Second Age Group with Financial Class		Number of Medicare Patients in First Age Group for Provider	
UDS - Medicaid/Medicare Report	334	UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in ZIP Code		Number of Medicare Patients in First Age Group in ZIP Code	
UDS - Medicaid/Medicare Report	334	UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients with Financial Class		Number of Medicare Patients in First Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334	UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients		Number of Medicare Patients in Second Age Group	
UDS - Medicaid/Medicare Report	334	UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients at Clinic		Number of Medicare Patients in Second Age Group at Clinic	
UDS - Medicaid/Medicare Report	334	UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients for Provider		Number of Medicare Patients in Second Age Group for Provider	
UDS - Medicaid/Medicare Report	334	UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in First Age Group		Number of Medicare Patients in Second Age Group in ZIP Code	
UDS - Medicaid/Medicare Report	334	UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in First Age Group at Clinic		Number of Medicare Patients in Second Age Group with Financial Class	
UDS - Medicaid/Medicare Report	334	UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in First Age Group for Provider		Number of Medicare Patients in ZIP Code	
UDS - Medicaid/Medicare Report	334	UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in First Age Group in ZIP Code		Number of Medicare Patients with Financial Class	
UDS - Medicaid/Medicare Report	334	UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in First Age Group with Financial Class		Number of Other Patients	
UDS - Medicaid/Medicare Report	334	Practice Statistics Report	246
Number of Medicaid Patients in Second Age Group		Number of Patient Non-guarantors	
UDS - Medicaid/Medicare Report	334	Practice Statistics Report	246
Number of Medicaid Patients in Second Age Group at Clinic		Number of Patients <6 or 65+ Years	
UDS - Medicaid/Medicare Report	334	Meaningful Use Measure Calculation List	156
Number of Medicaid Patients in Second Age Group for Provider		Number of Patients <6 or 65+ Years who Received Appointment Reminders	
UDS - Medicaid/Medicare Report	334	Meaningful Use Measure Calculation List	156
Number of Medicaid Patients in Second Age Group in ZIP Code		Number of Patients 0 - 19 Years	
UDS - Medicaid/Medicare Report	334	Clinical Quality Measures List	66
Number of Medicaid Patients in Second Age Group with Financial Class		Number of Patients 0 - 19 Years with Fluoride Varnish	
UDS - Medicaid/Medicare Report	334	Clinical Quality Measures List	66
Number of Medicaid Patients in ZIP Code		Number of Patients 0 - 19 Years with Tooth Decay or Cavities	
UDS - Medicaid/Medicare Report	334	Clinical Quality Measures List	66
Number of Medicaid Patients with Financial Class		Number of Patients 0 - 19 Years with Visit	
UDS - Medicaid/Medicare Report	334	Clinical Quality Measures List	66
Number of Medicare Patients		Number of Patients 0 - 2 Years	
UDS - Medicaid/Medicare Report	334	Practice Statistics Report	246
Number of Medicare Patients at Clinic		Number of Patients 0 - 2 Years Seen	
UDS - Medicaid/Medicare Report	334	Meaningful Use Measure Calculation List	156
Number of Medicare Patients for Provider		Number of Patients 0 - 2 Years with Vital Sign Readings	
UDS - Medicaid/Medicare Report	334	Meaningful Use Measure Calculation List	156
		Meaningful Use Measure Calculation List	156
		Number of Patients 11 - 12 Years	
		Practice Statistics Report	246
		Number of Patients 13 - 14 Years	
		Practice Statistics Report	246

Patient (continued)

Number of Patients 13+ Years Seen		Number of Patients 3 - 17 Years with Medical Encounters (with Exclusions)	
Meaningful Use Measure Calculation List	156	Clinical Quality Measures List	66
Meaningful Use Measure Calculation List	156	Number of Patients 3 - 17 Years with Outpatient Visits (with Exclusions)	
Number of Patients 13+ Years with Smoking Status		Clinical Quality Measures List	66
Meaningful Use Measure Calculation List	156	Number of Patients 3 - 4 Years	
Meaningful Use Measure Calculation List	156	Practice Statistics Report	246
Number of Patients 15 - 16 Years		Number of Patients 3+ Years with Vital Sign Readings	
Practice Statistics Report	246	Meaningful Use Measure Calculation List	156
Number of Patients 17 - 20 Years		Number of Patients 3+ Years Seen	
Practice Statistics Report	246	Meaningful Use Measure Calculation List	156
Number of Patients 18 - 64 Years		Number of Patients 3+ Years with Vital Sign Readings	
Clinical Quality Measures List	66	Meaningful Use Measure Calculation List	156
Number of Patients 18 - 64 Years with Abnormal BMI Reading and Follow Up		Number of Patients 31 - 40 Years	
Clinical Quality Measures List	66	Practice Statistics Report	246
Number of Patients 18 - 64 Years with Medical Encounters (with Exclusions)		Number of Patients 41 - 50 Years	
Clinical Quality Measures List	66	Practice Statistics Report	246
Number of Patients 18 - 85 Years		Number of Patients 5 - 6 Years	
Clinical Quality Measures List	66	Practice Statistics Report	246
Number of Patients 18 - 85 Years with Abnormal Blood Pressure Reading		Number of Patients 51 - 60 Years	
Clinical Quality Measures List	66	Practice Statistics Report	246
Number of Patients 18 - 85 Years with Hypertension		Number of Patients 6+ Months	
Clinical Quality Measures List	66	Clinical Quality Measures List	66
Number of Patients 18 - 85 Years with Outpatient Visits (with Exclusions)		Number of Patients 6+ Months who Received Influenza Vaccinations	
Clinical Quality Measures List	66	Clinical Quality Measures List	66
Number of Patients 18+ Years		Number of Patients 61 - 70 Years	
Clinical Quality Measures List	66	Practice Statistics Report	246
Number of Patients 18+ Years who Use Tobacco and Received Cessation Counseling		Number of Patients 65+ Years	
Clinical Quality Measures List	66	Clinical Quality Measures List	66
Number of Patients 18+ Years with Current Medications		Number of Patients 65+ Years with Abnormal BMI Reading and Follow Up	
Clinical Quality Measures List	66	Clinical Quality Measures List	66
Number of Patients 18+ Years with Medical Encounters or Patient Health Assessments		Number of Patients 65+ Years with Medical Encounters (with Exclusions)	
Clinical Quality Measures List	66	Clinical Quality Measures List	66
Number of Patients 18+ Years with Visits		Number of Patients 66+ Years	
UDS - Tobacco Use and Intervention Report	342	Clinical Quality Measures List	66
Clinical Quality Measures List	66	Number of Patients 66+ Years Seen	
Number of Patients 2+ Years Seen		Clinical Quality Measures List	66
Meaningful Use Measure Calculation List	156	Number of Patients 66+ Years with 1+ High-risk Medications	
Number of Patients 2+ Years with Vital Sign Readings		Clinical Quality Measures List	66
Meaningful Use Measure Calculation List	156	Number of Patients 66+ Years with 2+ High-risk Medications	
Number of Patients 21 - 30 Years		Clinical Quality Measures List	66
Practice Statistics Report	246	Number of Patients 7 - 8 Years	
Number of Patients 3 - 17 Years		Practice Statistics Report	246
Clinical Quality Measures List	66	Number of Patients 71 - 80 Years	
Number of Patients 3 - 17 Years who Received Nutrition Counseling		Practice Statistics Report	246
Clinical Quality Measures List	66	Number of Patients 81+ Years	
Number of Patients 3 - 17 Years who Received Physical Activity Counseling		Practice Statistics Report	246
Clinical Quality Measures List	66	Number of Patients 9 - 10 Years	
Number of Patients 3 - 17 Years with BMI Percentile Reading		Practice Statistics Report	246
Clinical Quality Measures List	66	Number of Patients at Clinic from Referral Source	
		Referral Analysis Report	282
		Number of Patients Due for Prophylaxis (on Month and Year)	
		Practice Statistics Report	246
		Number of Patients Eligible for Prophylaxis Continuing Care	
		Practice Statistics Report	246

Patient (continued)

Number of Patients for Provider Practice Statistics Report	246	Number of Patients with Incorporated Health Data Meaningful Use Measure Calculation List	156
Number of Patients from Referral Source Referral Analysis Report	282	Number of Patients with Medication Allergies or Attestations of No Known Medication Allergies Meaningful Use Measure Calculation List	156
Number of Patients in ZIP Code Practice Statistics Report	246	Number of Patients with Medications Meaningful Use Measure Calculation List	156
Number of Patients not on Prophy Continuing Care Practice Statistics Report	246	Number of Patients with Medications or Attestations of No Known Medications Meaningful Use Measure Calculation List	156
Number of Patients Provided API Access to Electronic Health Information Meaningful Use Measure Calculation List	156	Number of Patients with Medications Ordered Using CPOE (Computerized Provider Order Entry) Meaningful Use Measure Calculation List	156
Number of Patients Provided Patient Education Resources Meaningful Use Measure Calculation List	156	Number of Patients with Moderate to High Risk of Caries UDS - Sealant Statistics Report	340
Number of Patients Provided Timely Online Access to Electronic Health Information Meaningful Use Measure Calculation List	156	Number of Patients with Moderate to High Risk of Caries for Provider UDS - Sealant Statistics Report	340
Number of Patients Seen Analysis Summary Report - Standard	12	Number of Patients with Moderate to High Risk of Caries in Clinic UDS - Sealant Statistics Report	340
Daily Summary Report	88	Number of Patients with Moderate to High Risk of Caries in ZIP Code UDS - Sealant Statistics Report	340
Meaningful Use Measure Calculation List	156	Number of Patients with Moderate to High Risk of Caries who Got Sealants on Permanent First Molars UDS - Sealant Statistics Report	340
Analysis Summary Report - Daily	8	Number of Patients with Moderate to High Risk of Caries who Got Sealants on Permanent First Molars for Provider UDS - Sealant Statistics Report	340
Number of Patients Seen at Clinic Analysis Summary Report - Standard	12	Number of Patients with Moderate to High Risk of Caries who Got Sealants on Permanent First Molars in Clinic UDS - Sealant Statistics Report	340
Day Sheet Report	100	Number of Patients with Moderate to High Risk of Caries who Got Sealants on Permanent First Molars in ZIP Code UDS - Sealant Statistics Report	340
Analysis Summary Report - Daily	8	Number of Patients with Primary Dental Insurance Only Practice Statistics Report	246
Number of Patients Seen by Provider Analysis Summary Report - Standard	12	Number of Patients with Primary Medical Insurance Practice Statistics Report	246
Day Sheet Report	100	Number of Patients with Problems or Attestations of No Known Problems Meaningful Use Measure Calculation List	156
Analysis Summary Report - Daily	8	Number of Patients with Required Demographics Meaningful Use Measure Calculation List	156
Number of Patients Seen During Past 24 Months Meaningful Use Measure Calculation List	156	Number of Patients with Searchable Clinical Notes Meaningful Use Measure Calculation List	156
Number of Patients Seen for Insurance Carrier Utilization Report	354	Number of Patients with Secondary Dental Insurance Practice Statistics Report	246
RVU Utilization Report	304	Number of Patients with Status UDS - Patient Status Report	338
Number of Patients Seen MTD Day Sheet (Charges and Receipts) Report	94	Number of Patients with Status for Clinic UDS - Patient Status Report	338
Number of Patients Seen MTD by Provider Day Sheet (Charges and Receipts) Report	94	Number of Patients with Status for Provider UDS - Patient Status Report	338
Number of Patients Sent Reminders Meaningful Use Measure Calculation List	156	Number of Patients with Vital Sign Readings Meaningful Use Measure Calculation List	156
Number of Patients who Accessed Electronic Health Information with API Meaningful Use Measure Calculation List	156		
Number of Patients who Sent Secure Electronic Messages Meaningful Use Measure Calculation List	156		
Number of Patients who Viewed or Downloaded or Transmitted (VDT) Electronic Health Information Meaningful Use Measure Calculation List	156		
Number of Patients Who Were Sent Secure Electronic Messages Meaningful Use Measure Calculation List	156		
Number of Patients with Dental and Medical Insurance Practice Statistics Report	246		
Number of Patients with Electronic Prescriptions Meaningful Use Measure Calculation List	156		
Number of Patients with Family Health History Recorded Meaningful Use Measure Calculation List	156		

Patient (continued)

Number of Patients without a Birth Date Entered		Patient Amount Aged 0 - 30	
Practice Statistics Report	246	Patient Route Slip	216
Number of Patients without a ZIP Code		Patient Amount Aged 31 - 60	
Practice Statistics Report	246	Patient Route Slip	216
Number of Patients without Dental and Medical Insurance		Patient Amount Aged 61 - 90	
Practice Statistics Report	246	Patient Route Slip	216
Number of Patients without Dental Insurance		Patient Balance	
Practice Statistics Report	246	Patient Route Slip	216
Number of Patients without Medical Insurance		Patient Treatment Case Report	218
Practice Statistics Report	246	Patient's Ledger Report	220
Number of Referred by Doctor/Other Patients Listed		Referred By Doctor/Other Report	288
Referred By Doctor/Other Report	288	Referred By Patient Report	290
Number of Separated Patients		Treatment Case Report	314
Practice Statistics Report	246	Continuing Care Display List	76
Number of Single Patients		Patient Birth Date	
Practice Statistics Report	246	Employers and Employed Patients Report	116
Number of Tobacco Non-users 18+ Years with Tobacco Use Assessment		Insurance Carrier List	132
UDS - Tobacco Use and Intervention Report	342	Patient Chart and Progress Notes Printout	194
Number of Widowed Patients		Patient Chart Printout	196
Practice Statistics Report	246	Patient List	204
Number or Child Patients		Patient List (Filtered)	206
Practice Statistics Report	246	Patient Proposed Treatment Case Report (Your Care Plan)	212
Other Deductible Owed by Patient to Primary Insurance		Patient Questionnaire	214
Treatment Case Report	314	Patient Route Slip	216
Patient Treatment Case Report	218	Patient Treatment Case Report	218
Other Deductible Owed by Patient to Secondary Insurance		Perio - Combined Graphic & Data Chart Report	228
Treatment Case Report	314	Perio - Exam Comparison Report	232
Patient Treatment Case Report	218	Perio - Graphic Chart Report	234
Other Retroactive Payment Amount Collected for Patient		Practice Treatment Case Report	248
UDS - Patient Related Revenue Report	336	Prescription Printout	250
Patient Address		Pre-Treatment Estimate Aging Report	252
Birthday List	50	RVU Utilization Report	304
Continuing Care Cards - No Appointment	74	Treatment Case Report	314
Continuing Care Cards - with Appointment	75	Treatment Plan Approval Report	316
Coupon Book - Future Due Payments	78	Treatment Plan Approval Status Report	318
Coupon Book - Payment Agreements	79	UDS - Age/Gender Report	322
New Patient List	184	UDS - Insurance Financial Class Report	330
Patient Ledger Report	202	UDS - Insurance Financial Class Report (2013)	332
Patient List	204	UDS - Medicaid/Medicare Report	334
Patient Questionnaire	214	UDS - Patient Status Report	338
Patient Route Slip	216	UDS - Sealant Statistics Report	340
Patient's Ledger Report	220	UDS - Tobacco Use and Intervention Report	342
Prescription Printout	250	Utilization Report	354
Referral Recap Report	284	Walkout - Doctor's Statement	356
Referral Slip	286	Clinical Notes Report	64
Walkout - Doctor's Statement	356	Patient Chart Number	
Appointment Reminder Cards	18	Clinical Notes Report	64
Patient Age		Coupon Book - Future Due Payments	78
Patient List (Filtered)	206	Coupon Book - Payment Agreements	79
Patient Route Slip	216	Day Sheet (Adjustments) Report	90
Walkout - Doctor's Statement	356	Day Sheet (Receipts) Report	98
Continuing Care Display List	76	Employers and Employed Patients Report	116
Patient Alert Note		Insurance Carrier List	132
Patient Notes Report	208	Insurance Eligibility Report	146
Patient Amount Aged >90		Letter Merge Reports	152
Patient Route Slip	216	Operator Day Sheet Report	188
		Patient Chart and Progress Notes Printout	194
		Patient Chart Printout	196
		Patient Information Accessed Report	200
		Patient Ledger Report	202

Patient (continued)

Patient List	204	Patient First Name	
Patient List (Filtered)	206	Letter Merge Reports	152
Patient Notes Report	208	Patient Gender	
Patient Proposed Treatment Case Report (Your Care Plan)	212	Patient List	204
Patient Route Slip	216	Patient Questionnaire	214
Patient Treatment Case Report	218	Patient Route Slip	216
Perio - Exam Comparison Report	232	UDS - Age/Gender Report	322
Perio - Graphic Chart Report	234	Letter Merge Reports	152
Practice Treatment Case Report	248	Patient Homeless Status	
RVU Day Sheet Report	296	Patient List (Filtered)	206
Treatment Case Report	314	Patient Insurance Carrier Name	
Treatment Plan Approval Report	316	Continuing Care Display List	76
Treatment Plan Approval Status Report	318	Patient Language	
UDS - Age/Gender Report	322	Patient List (Filtered)	206
UDS - Insurance Financial Class Report	330	Letter Merge Reports	152
UDS - Insurance Financial Class Report (2013)	332	Patient Last Name	
UDS - Medicaid/Medicare Report	334	Letter Merge Reports	152
UDS - Patient Status Report	338	Patient Marital Status	
UDS - Sealant Statistics Report	340	Insurance Carrier List	132
UDS - Tobacco Use and Intervention Report	342	Letter Merge Reports	152
Walkout - Doctor's Statement	356	Patient List	204
Audit Report - Combined	32	Patient Route Slip	216
Patient City		Employers and Employed Patients Report	116
Patient List (Filtered)	206	Patient Medical/Other ID	
Letter Merge Reports	152	Patient List	204
Patient Clinic		Patient Middle Initial	
Patient List (Filtered)	206	Letter Merge Reports	152
Patient Contact		Patient Mobile Number	
Patient List (Filtered)	206	Patient List (Filtered)	206
Patient County		Patient Questionnaire	214
Patient List (Filtered)	206	Patient List	204
Patient Driver's License Number		Patient Name	
Patient Questionnaire	214	Appointment Cycle Time Report	16
Patient List	204	Appointment Reminder Cards	18
Patient Email Address		As Soon As Possible List	22
Patient Questionnaire	214	Audit Report - Appointments	26
Patient List	204	Audit Report - Combined	32
Patient Employer		Audit Report - Patients	34
Treatment Plan Approval Status Report	318	Audit Report - Transactions	38
Treatment Plan Approval Report	316	Billing Statement	48
Patient Employer Name		Birthday List	50
Insurance Carrier List	132	Clinical Notes Report	64
Patient EMR Number		Continuing Care Cards - No Appointment	74
UDS - Insurance Financial Class Report	330	Continuing Care Cards - with Appointment	75
UDS - Insurance Financial Class Report (2013)	332	Continuing Care Display List	76
UDS - Medicaid/Medicare Report	334	Coupon Book - Future Due Payments	78
UDS - Patient Status Report	338	Coupon Book - Payment Agreements	79
UDS - Sealant Statistics Report	340	Daily Appointment List (DX1)	84
UDS - Tobacco Use and Intervention Report	342	Daily Appointment List Report	86
UDS - Age/Gender Report	322	Day Sheet (Adjustments) Report	90
Patient Estimated Insurance Portion		Day Sheet (Charges and Receipts) Report	94
Patient Route Slip	216	Day Sheet (Receipts) Report	98
Patient Ethnicity		Day Sheet Report	100
Patient List (Filtered)	206	Dental Encounters Report	106
Patient Ext ID		Document Center Document	112
Patient List (Filtered)	206	Document Center List	114
Patient Fax Number		Employers and Employed Patients Report	116
Patient Questionnaire	214	Family Ledger Report	118
Patient List	204	Family Ledger Report (Single Family)	120
		Future Due Payment Plan Report - Standard	128
		Insurance Carrier List	132
		Insurance Carrier Production - Full Report	136

Patient (continued)

Insurance Claim Aging Report	140	UDS - Sealant Statistics Report	340
Insurance Claims Not Sent Report	142	UDS - Tobacco Use and Intervention Report	342
Insurance Eligibility Report	146	Unscheduled Appointment List (DX1)	344
Insurance Transaction Analysis Report	148	Unscheduled Appointment List (OM)	346
New Patient List	184	Unscheduled Treatment Plans (Condensed) Report	348
Operator Day Sheet Report	188	Unscheduled Treatment Plans (Detailed) Report	350
Operatory Appointment List Report	190	Utilization Report	354
Patient Chart and Progress Notes Printout	194	Walkout - Doctor's Statement	356
Patient Chart Printout	196	Walkout - Family Walkout	358
Patient Health Assessment Report	198	Appointment Book View Printout	14
Patient Information Accessed Report	200	Patient Name Change	
Patient Ledger Report	202	Audit Report - Patients	34
Patient Ledger Report	202	Audit Report - Transactions	38
Patient List	204	Audit Report - Appointments	26
Patient List (Filtered)	206	Patient Name on Appointment	
Patient Notes Report	208	Letter Merge Reports	152
Patient Proposed Treatment Case Report (Your Care Plan)	212	Patient Note	
Patient Questionnaire	214	Patient Route Slip	216
Patient Route Slip	216	Patient Notes Report	208
Patient Route Slip	216	Patient Other ID	
Patient Treatment Case Report	218	Patient List (Filtered)	206
Patient's Ledger Report	220	Letter Merge Reports	152
Patient's Ledger Report	220	Patient Other Number	
Perio - Combined Graphic & Data Chart Report	228	Patient Questionnaire	214
Perio - Data Chart Report	230	Patient List	204
Perio - Exam Comparison Report	232	Patient Poverty Level	
Perio - Graphic Chart Report	234	Patient List (Filtered)	206
Perio - Pocket Depths Only Report	236	Patient Preferred Contact Method	
Perio Exam List	238	Patient List (Filtered)	206
Practice Treatment Case Report	248	Patient Race	
Prescription Printout	250	Patient List (Filtered)	206
Pre-Treatment Estimate Aging Report	252	Patient Relationship to Subscriber for Primary Insurance	
Pre-Treatment Estimates Not Sent Report	254	Patient Questionnaire	214
Procedures Not Attached to Insurance Report	258	Patient Relationship to Subscriber for Secondary Insurance	
Production Summary Report	260	Patient Questionnaire	214
Provider Revenue - Allocations Report	274	Patient Religion	
Provider Revenue - Charges Report	276	Patient List (Filtered)	206
Provider Revenue - Credits Report	278	Patient Running Balance	
Referral Recap Report	284	Patient Ledger Report	202
Referral Slip	286	Patient Salutation	
Referred By Doctor/Other Report	288	Continuing Care Cards - with Appointment	75
RVU Day Sheet Report	296	Letter Merge Reports	152
RVU Production Summary Report	298	Continuing Care Cards - No Appointment	74
RVU Utilization Report	304	Patient Signature	
Secondary Insurance Claims Not Created Report	306	Treatment Case Report	314
Secondary Pre-Treatment Estimates Not Created Report	308	Patient Social Security Number	
Suspended Credits Report	312	Coupon Book - Future Due Payments	78
Treatment Case Report	314	Coupon Book - Payment Agreements	79
Treatment Plan Approval Report	316	Employers and Employed Patients Report	116
Treatment Plan Approval Status Report	318	Insurance Transaction Analysis Report	148
UDS - Age/Gender Report	322	Letter Merge Reports	152
UDS - Insurance Financial Class Report	330	Patient Chart and Progress Notes Printout	194
UDS - Insurance Financial Class Report (2013)	332	Patient Chart Printout	196
UDS - Medicaid/Medicare Report	334	Patient List	204
UDS - Patient Related Revenue Report	336	Patient Notes Report	208
UDS - Patient Status Report	338	Patient Proposed Treatment Case Report (Your Care Plan)	212
		Patient Questionnaire	214
		Patient Route Slip	216

Patient (continued)

Patient Treatment Case Report	218	Patient ZIP Code	
Perio - Combined Graphic & Data Chart Report	228	Patient List (Filtered)	206
Perio - Exam Comparison Report	232	Letter Merge Reports	152
Perio - Graphic Chart Report	234	Patient's Preferred Name	
Practice Treatment Case Report	248	Letter Merge Reports	152
RVU Utilization Report	304	Appointment Book View Printout	14
Treatment Case Report	314	Penalty or Payback Amount Collected for Patient	
UDS - Age/Gender Report	322	UDS - Patient Related Revenue Report	336
UDS - Insurance Financial Class Report	330	Percent of Active Patient Guarantors	
UDS - Insurance Financial Class Report (2013)	332	Practice Statistics Report	246
UDS - Medicaid/Medicare Report	334	Percent of Active Patients	
UDS - Patient Status Report	338	Practice Statistics Report	246
UDS - Sealant Statistics Report	340	Percent of Divorced Patients	
UDS - Tobacco Use and Intervention Report	342	Practice Statistics Report	246
Utilization Report	354	Percent of Female Patients	
Walkout - Doctor's Statement	356	Practice Statistics Report	246
Clinical Notes Report	64	Percent of Male Patients	
Patient Social Security Number or Request Date		Practice Statistics Report	246
Audit Report - Patients	34	Percent of Married Patients	
Patient Social Security Number or Request Date		Practice Statistics Report	246
Change		Percent of Other Patients	
Audit Report - Patients	34	Practice Statistics Report	246
Patient State		Percent of Patient Non-guarantors	
Patient List (Filtered)	206	Practice Statistics Report	246
Letter Merge Reports	152	Percent of Patients Due for Prophy (Month and Year)	
Patient Status		Practice Statistics Report	246
Letter Merge Reports	152	Percent of Patients for Provider	
New Patient List	184	Practice Statistics Report	246
Patient List	204	Percent of Patients in ZIP Code	
Audit Report - Patients	34	Practice Statistics Report	246
Patient Status Change		Percent of Patients not on Prophy Continuing Care	
Audit Report - Patients	34	Practice Statistics Report	246
Patient Street Address		Percent of Patients with Dental and Medical Insurance	
Patient List (Filtered)	206	Practice Statistics Report	246
Letter Merge Reports	152	Percent of Patients with Dental Fluorosis	
Patient Suspended Credit Amount		Caries Prevalence and Periodontal Index Report	52
Patient Route Slip	216	Percent of Patients with dmfs > 0	
Patient Title		Caries Prevalence and Periodontal Index Report	52
Letter Merge Reports	152	Percent of Patients with Highest CPITN	
Patient User Defined Category		Caries Prevalence and Periodontal Index Report	52
Patient List (Filtered)	206	Percent of Patients with History of Decay	
Patient Veteran Status		Caries Prevalence and Periodontal Index Report	52
Patient List (Filtered)	206	Percent of Patients with Loss of Attachment < 3 mm	
Patient Work Phone Extension		Caries Prevalence and Periodontal Index Report	52
Patient Ledger Report	202	Percent of Patients with Loss of Attachment >= 3 & < 5 mm	
Patient Questionnaire	214	Caries Prevalence and Periodontal Index Report	52
Letter Merge Reports	152	Percent of Patients with Loss of Attachment >= 5 mm	
Patient Work Phone Number		Caries Prevalence and Periodontal Index Report	52
Continuing Care Display List	76	Percent of Patients with Perio Pockets < 4 mm	
Letter Merge Reports	152	Caries Prevalence and Periodontal Index Report	52
Patient Ledger Report	202	Percent of Patients with Perio Pockets >= 4 & 6 mm	
Patient List	204	Caries Prevalence and Periodontal Index Report	52
Patient List (Filtered)	206	Percent of Patients with Perio Pockets >= 4 & 6 mm	
Patient Notes Report	208	Caries Prevalence and Periodontal Index Report	52
Patient Questionnaire	214	Percent of Patients with Perio Pockets >= 4 & 6 mm	
Patient Route Slip	216	Caries Prevalence and Periodontal Index Report	52
Appointment Book View Printout	14		
Patient Worker Status			
Patient List (Filtered)	206		

Patient (continued)

Percent of Patients with Perio Pockets >= 6 mm Caries Prevalence and Periodontal Index Report 52		Referring Patient Home Phone Number Referred By Patient Report	290
Percent of Patients with Primary Dental Insurance Only Practice Statistics Report	246	Referring Patient Name Referred By Patient Report	290
Percent of Patients with Primary Medical Insurance Practice Statistics Report	246	Religion UDS - Patient Status Report	338
Percent of Patients with Secondary Dental Insurance Practice Statistics Report	246	Secondary Insurance Benefits Expiration Date for Patient Treatment Case Report	314
Percent of Patients without a Birth Date Entered Practice Statistics Report	246	Patient Treatment Case Report	218
Percent of Patients without Dental and Medical Insurance Practice Statistics Report	246	Sexual Orientation UDS - Patient Status Report	338
Percent of Patients without Dental Insurance Practice Statistics Report	246	Standard Deductible Owed by Patient to Primary Insurance Treatment Case Report	314
Percent of Patients without Medical Insurance Practice Statistics Report	246	Patient Treatment Case Report	218
Percent of Separated Patients Practice Statistics Report	246	Standard Deductible Owed by Patient to Secondary Insurance Treatment Case Report	314
Percent of Single Patients Practice Statistics Report	246	Patient Treatment Case Report	218
Percent of Widowed Patients Practice Statistics Report	246	Total Amount Collected for Patient UDS - Patient Related Revenue Report	336
Percent or Child Patients Practice Statistics Report	246	Total Amount of Allowances for Patient UDS - Patient Related Revenue Report	336
Phone Number of Patient on Appointment Letter Merge Reports	152	Total Amount of Bad Debt Write-offs for Patient UDS - Patient Related Revenue Report	336
Poverty Level UDS - Patient Status Report	338	Total Amount of Charges for Patient UDS - Patient Related Revenue Report	336
Preventative Deductible Owed by Patient to Primary Ins Treatment Case Report	314	Total Amount of Patient Payments Received Insurance Transaction Analysis Report	148
Patient Treatment Case Report	218	Total Amount of Patient Portion for Case Treatment Case Report	314
Preventative Deductible Owed by Patient to Secondary Ins Treatment Case Report	314	Total Amount of Patient Portions Patient Chart Printout	196
Patient Treatment Case Report	218	Total Amount of Sliding Discounts for Patient UDS - Patient Related Revenue Report	336
Primary Insurance Benefits Expiration Date for Patient Treatment Case Report	314	Total Average Charge per Patient Analysis Summary Report - Standard	12
Patient Treatment Case Report	218	Analysis Summary Report - Daily	8
Printed Patient Report Audit Report - Combined	32	Total Average Production per Patient Analysis Summary Report - Standard	12
Race UDS - Patient Status Report	338	Analysis Summary Report - Daily	8
Referred by Patient Name Document Center Document	112	Total Average Production per Patient at Clinics from Referral Source Referral Analysis Report	282
Referred Patient Referred By Patient Report	290	Total Estimated Amount of Patient's Portion Patient Proposed Treatment Case Report (Your Care Plan)	212
Referred Patient Name Referred To Doctor Report	292	Total Number UDS - Insurance Financial Class Report	330
Referred Patients (Average) Practice Analysis Report	242	Total Number <19 Years Old for Financial Class Types UDS - Insurance Financial Class Report	330
Referred Patients (for Date Range) Practice Analysis Report	242	Total Number of All Genders UDS - Age/Gender Report	322
Referred Patients (MTD) Practice Analysis Report	242	Total Number of Females UDS - Age/Gender Report	322
Referred Patients (YTD) Practice Analysis Report	242	Total Number of Males UDS - Age/Gender Report	322
Referring Patient Address Referred By Patient Report	290	Total Number of Other Gender UDS - Age/Gender Report	322
		Total Number of Patient Payments Received Insurance Transaction Analysis Report	148

Patient (continued)

Total Number of Patient with Medicaid Operator Day Sheet Report	188
Total Number of Patients Operator Day Sheet Report	188
Total Number of Patients (any Status) Practice Statistics Report	246
Total Number of Patients at Clinics from Referral Source Referral Analysis Report	282
Total Number of Patients from Referral Sources Referral Analysis Report	282
Total Number of Patients Seen Analysis Summary Report - Standard	12
Day Sheet Report	100
RVU Utilization Report	304
Utilization Report	354
Analysis Summary Report - Daily	8
Total Number of Patients with Statuses UDS - Patient Status Report	338
Total Number of Referred by Doctor/Other Patients Listed Referred By Doctor/Other Report	288
Total Number of Unknown Gender UDS - Age/Gender Report	322
Total Other Retroactive Payment Amount Collected for Patient UDS - Patient Related Revenue Report	336
Total Patient Balance (as of Date) Patient Ledger Report	202
Total Patient Balance as of a Date Patient's Ledger Report	220
Total Penalty or Payback Amount Collected for Patient UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Patient (Current Year) UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Patient (Previous Years) UDS - Patient Related Revenue Report	336
Unique Patient Count for Provider RVU Day Sheet Report	296
User Defined Category UDS - Patient Status Report	338
Veteran Status UDS - Patient Status Report	338
Worker Status UDS - Patient Status Report	338
Wrap Around or Reconciliation Amount Collected for Patient (Current Year) UDS - Patient Related Revenue Report	336
Wrap Around or Reconciliation Amount Collected for Patient (Previous Years) UDS - Patient Related Revenue Report	336
Years as Patient Patient Route Slip	216

Patient Alert

Alerts Appointment Book View Printout	14
Patient Alert Note Patient Notes Report	208

Patient Education Resource

Number of Patients Provided Patient Education Resources Meaningful Use Measure Calculation List	156
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Patient Health Assessment

Number of Patients 18+ Years with Medical Encounters or Patient Health Assessments Clinical Quality Measures List	66
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Patient Note

Patient Note Patient Route Slip	216
Patient Notes Report	208

Patient Portion

Amount of Patient Portion Patient Treatment Case Report	218
Practice Treatment Case Report	248
Treatment Case Report	314
Patient Chart Printout	196
Amount of Patient Portion for Case Practice Treatment Case Report	248
Patient Treatment Case Report	218
Amount of Patient Portion for Visit Practice Treatment Case Report	248
Treatment Case Report	314
Patient Treatment Case Report	218
Estimated Amount of Patient's Portion Patient Treatment Case Report	218
Treatment Case Report	314
Patient Proposed Treatment Case Report (Your Care Plan)	212
Estimated Patient Portion Patient Route Slip	216
Total Amount of Patient Portion for Case Treatment Case Report	314
Total Amount of Patient Portions Patient Chart Printout	196
Total Estimated Amount of Patient's Portion Patient Proposed Treatment Case Report (Your Care Plan)	212

Pay

Amount to Pay Billing Statement	48
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Payback

Penalty or Payback Amount Collected for Patient UDS - Patient Related Revenue Report	336
Subtotal of Penalty or Payback Amount Collected for Financial Class Type UDS - Patient Related Revenue Report	336
Subtotal of Penalty or Payback Amount Collected for Payer Category UDS - Patient Related Revenue Report	336
Total Penalty or Payback Amount Collected for Financial Class Type UDS - Patient Related Revenue Report	336
Total Penalty or Payback Amount Collected for Patient UDS - Patient Related Revenue Report	336
Total Penalty or Payback Amount Collected for Payer Category UDS - Patient Related Revenue Report	336

Payer

Payer Category UDS - Patient Related Revenue Report	336
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Payer (continued)

Subtotal of Allowances for Payer Category		Amount of Applied Payments for Previous Month for Provider	
UDS - Patient Related Revenue Report	336	Day Sheet (Charges and Receipts) Report	94
Subtotal of Amount Collected for Payer Category		Amount of Applied Payments for Provider	
UDS - Patient Related Revenue Report	336	Analysis Summary Report - Standard	12
Subtotal of Bad Debt Write-offs for Payer Category		Day Sheet Report	100
UDS - Patient Related Revenue Report	336	Analysis Summary Report - Daily	8
Subtotal of Charges for Payer Category		Amount of Current Applied Payments for Provider	
UDS - Patient Related Revenue Report	336	Day Sheet (Charges and Receipts) Report	94
Subtotal of Other Retroactive Payment Amount Collected for Payer Category		Amount of Current Suspended Payments for Provider	
UDS - Patient Related Revenue Report	336	Day Sheet (Charges and Receipts) Report	94
Subtotal of Penalty or Payback Amount Collected for Payer Category		Amount of Future Due Payment Agreements	
UDS - Patient Related Revenue Report	336	Practice Analysis Report	242
Subtotal of Sliding Discounts for Payer Category		Amount of Guarantor Payments YTD	
UDS - Patient Related Revenue Report	336	Walkout - Family Walkout	358
Subtotal of Wrap Around or Reconciliation Amount Collected for Payer Category (Current Year)		Amount of Insurance Payments	
UDS - Patient Related Revenue Report	336	Provider A/R Totals - Daily Report	264
Subtotal of Wrap Around or Reconciliation Amount Collected for Payer Category (Previous Years)		Amount of Insurance Payments for Provider	
UDS - Patient Related Revenue Report	336	Provider A/R Totals - Standard Report	266
Total Amount Collected for Payer Category		Provider A/R Totals - Daily Report	264
UDS - Patient Related Revenue Report	336	Amount of Insurance Payments YTD	
Total Amount of Allowances for Payer Category		Walkout - Family Walkout	358
UDS - Patient Related Revenue Report	336	Amount of Last Payment Amount	
Total Amount of Bad Debt Write-offs for Payer Category		Letter Merge Reports	152
UDS - Patient Related Revenue Report	336	Amount of MTD Applied Payments for Provider	
Total Amount of Charges for Payer Category		Day Sheet (Charges and Receipts) Report	94
UDS - Patient Related Revenue Report	336	Amount of MTD Suspended Payments for Provider	
Total Amount of Sliding Discounts for Payer Category		Day Sheet (Charges and Receipts) Report	94
UDS - Patient Related Revenue Report	336	Amount of Other Applied Insurance Payments for Clinic	
Total Other Retroactive Payment Amount Collected for Payer Category		Analysis Summary Report - Standard	12
UDS - Patient Related Revenue Report	336	Day Sheet Report	100
Total Penalty or Payback Amount Collected for Payer Category		Analysis Summary Report - Daily	8
UDS - Patient Related Revenue Report	336	Amount of Other Applied Insurance Payments for Provider	
Total Wrap Around or Reconciliation Amount Collected for Payer Category (Current Year)		Analysis Summary Report - Standard	12
UDS - Patient Related Revenue Report	336	Day Sheet Report	100
Total Wrap Around or Reconciliation Amount Collected for Payer Category (Previous Years)		Analysis Summary Report - Daily	8
UDS - Patient Related Revenue Report	336	Amount of Other Applied Payments for Clinic	
		Analysis Summary Report - Standard	12
		Day Sheet Report	100
		Analysis Summary Report - Daily	8
		Amount of Other Applied Payments for Provider	
		Analysis Summary Report - Standard	12
		Day Sheet Report	100
		Analysis Summary Report - Daily	8
		Amount of Payment Agreements	
		Practice Analysis Report	242
		Amount of Payment Type	
		Payment Summary Report	226
		Amount of Payments	
		Provider A/R Totals - Daily Report	264
		Amount of Payments for Provider	
		Provider A/R Totals - Standard Report	266
		Provider A/R Totals - Daily Report	264
		Amount of Primary Insurance Paid Benefits YTD for Family	
		Treatment Case Report	314
		Amount of Primary Insurance Paid Benefits YTD for Patient	
		Treatment Case Report	314
		Patient Treatment Case Report	218

Payment (continued)

Amount of Secondary Paid Benefits for Family Treatment Case Report	314	Date of Payment Coupon Book - Future Due Payments	78
Amount of Secondary Paid Benefits for Patient Treatment Case Report	314	Estimated Amount of Insurance Payments Treatment Case Report	314
Amount of Suspended Insurance Payments for Clinic Analysis Summary Report - Standard	12	Patient Treatment Case Report	218
Day Sheet Report	100	First Payment Amount Truth in Lending Disclosure Statement	320
Analysis Summary Report - Daily	8	First Payment Date Payment Agreement Report	224
Amount of Suspended Insurance Payments for Provider Analysis Summary Report - Standard	12	Grand Total Amount of Insurance Payments Received Insurance Transaction Analysis Report	148
Day Sheet Report	100	Grand Total Amount of Patient Payments Received Insurance Transaction Analysis Report	148
Analysis Summary Report - Daily	8	Grand Total Number of Insurance Payments Received Insurance Transaction Analysis Report	148
Amount of Suspended Payments for Clinic Analysis Summary Report - Standard	12	Grand Total Number of Patient Payments Received Insurance Transaction Analysis Report	148
Day Sheet Report	100	Insurance Payment Amount Insurance Carrier Production - Full Report	136
Analysis Summary Report - Daily	8	Insurance Payment Amount for Insurance Plan Insurance Carrier Production - Summary Report	138
Amount of Suspended Payments for Previous Month for Provider Day Sheet (Charges and Receipts) Report	94	Insurance Carrier Production - Full Report	136
Amount of Suspended Payments for Provider Analysis Summary Report - Standard	12	Insurance Payment for Date of Service Letter Merge Reports	152
Day Sheet Report	100	Last Payment Agreement Payment Amount Patient Route Slip	216
Analysis Summary Report - Daily	8	Last Payment Agreement Payment Date Patient Route Slip	216
Amount of YTD Applied Payments for Provider Day Sheet (Charges and Receipts) Report	94	Last Payment Amount Truth in Lending Disclosure Statement	320
Amount of YTD Suspended Payments for Provider Day Sheet (Charges and Receipts) Report	94	Aging/Credit Balance Report	6
Amount Paid Coupon Book - Payment Agreements	79	Last Payment Amount for Payment Agreement Collections Manager List	70
Coupon Book - Future Due Payments	78	Last Payment Date Aging/Credit Balance Report	6
Amount Paid by Insurance Dental Encounters Report	106	Last Payment Date for Payment Agreement Collections Manager List	70
Amount to Pay Billing Statement	48	Next Payment Agreement Payment Due Amount Patient Route Slip	216
Applied Insurance Payment Amount Analysis Summary Report - Standard	12	Next Payment Agreement Payment Due Date Patient Route Slip	216
Analysis Summary Report - Daily	8	Next Payment Plan Payment Amount Letter Merge Reports	152
Applied Payment Amount Analysis Summary Report - Standard	12	Next Payment Plan Payment Date Letter Merge Reports	152
Analysis Summary Report - Daily	8	Number of Missed Payment Agreement Payments Practice Analysis Report	242
Average Amount of Payment Type Payment Summary Report	226	Number of Missed Payments Payment Agreement Report	224
Average Amount of Payments Payment Summary Report	226	Number of Missed Payments for Payment Agreement Collections Manager List	70
Average Payment Amount Day Sheet (Receipts) Report	98	Number of Payment Agreement Payments Remaining Payment Agreement Report	224
Average Payment Amount for Clinic Day Sheet (Receipts) Report	98	Other Applied Insurance Payment Amount Analysis Summary Report - Standard	12
Average Payment Amount for Initial Provider Day Sheet (Receipts) Report	98	Analysis Summary Report - Daily	8
Average Payment Amount for Payment Type Day Sheet (Receipts) Report	98	Other Applied Payment Analysis Summary Report - Standard	12
Average Payment Amount for Provider Day Sheet (Receipts) Report	98	Other Applied Payment Amount Analysis Summary Report - Daily	8
Claim Payment Received Date Insurance Transaction Analysis Report	148		
Date of Last Payment Agreement Payment Letter Merge Reports	152		

Payment (continued)

Other Retroactive Payment Amount Collected for Patient		Payment Status	
UDS - Patient Related Revenue Report	336	Credit Card Transaction Report	80
Payment		Payment Type	
Day Sheet (Charges and Receipts) Report	94	Daily Summary Report	88
Payment Agreement Last Payment Amount		Day Sheet (Receipts) Report	98
Payment Agreement Report	224	Deposit Slip	108
Payment Agreement Last Payment Date		Credit Card Transaction Report	80
Payment Agreement Report	224	Payment Type Description	
Payment Agreement Next Payment Amount		Payment Summary Report	226
Payment Agreement Report	224	Payment Types	
Payment Agreement Next Payment Date		Custom Practice Information Report	82
Payment Agreement Report	224	Please Pay Amount	
Payment Agreement Payment Amount		Walkout - Family Walkout	358
Payment Agreement Amortization Schedule	222	Quantity of Payment Type	
Payment Agreement Payment Due Date		Payment Summary Report	226
Payment Agreement Amortization Schedule	222	Quantity of Payments for Clinic	
Payment Agreement Payment Number		Day Sheet (Receipts) Report	98
Payment Agreement Amortization Schedule	222	Quantity of Payments for Initial Provider	
Payment Agreement Payment Portion Applied to Interest		Day Sheet (Receipts) Report	98
Payment Agreement Amortization Schedule	222	Quantity of Payments for Payment Type	
Payment Agreement Payment Portion Applied to Principle		Day Sheet (Receipts) Report	98
Payment Agreement Amortization Schedule	222	Quantity of Payments for Provider	
Payment Agreement Remaining Balance		Day Sheet (Receipts) Report	98
Payment Agreement Report	224	Quantity of Procedures for Clinic	
Payment Agreement Report	224	RVU Production Summary Report	298
Payment Agreement Amortization Schedule	222	Production Summary Report	260
Payment Agreement Total Number of Payments		Source of Payment	
Payment Agreement Report	224	Insurance Carrier List	132
Payment Amount		Subtotal of Other Retroactive Payment Amount Collected for Financial Class Type	
Family Ledger Report	118	UDS - Patient Related Revenue Report	336
Family Ledger Report (Single Family)	120	Subtotal of Other Retroactive Payment Amount Collected for Payer Category	
Insurance Transaction Analysis Report	148	UDS - Patient Related Revenue Report	336
Operator Day Sheet Report	188	Suspended Insurance Payment Amount	
Patient Ledger Report	202	Analysis Summary Report - Standard	12
Patient's Ledger Report	220	Analysis Summary Report - Daily	8
Truth in Lending Disclosure Statement	320	Suspended Payment	
Updated Dental Insurance Payment Table Report	352	Analysis Summary Report - Standard	12
Deposit Slip	108	Suspended Payment Amount	
Payment Amount Due		Analysis Summary Report - Daily	8
Coupon Book - Payment Agreements	79	Total Amount of Applied Insurance Payments	
Coupon Book - Future Due Payments	78	Analysis Summary Report - Standard	12
Payment Amount for Payment Type		Day Sheet Report	100
Day Sheet (Receipts) Report	98	Analysis Summary Report - Daily	8
Payment Date		Total Amount of Applied Payments	
Patient's Ledger Report	220	Analysis Summary Report - Standard	12
Deposit Slip	108	Day Sheet Report	100
Payment Description		Analysis Summary Report - Daily	8
Patient's Ledger Report	220	Total Amount of Balances Remaining for Payment Agreements	
Payment Due Date		Payment Agreement Report	224
Coupon Book - Payment Agreements	79	Total Amount of Cash Payments	
Coupon Book - Future Due Payments	78	Operator Day Sheet Report	188
Payment Interval		Total Amount of Check Payments	
Payment Agreement Amortization Schedule	222	Operator Day Sheet Report	188
Payment Number		Total Amount of Credit Card Payments	
Coupon Book - Payment Agreements	79	Operator Day Sheet Report	188
Coupon Book - Future Due Payments	78	Total Amount of Current Applied Payments	
		Day Sheet (Charges and Receipts) Report	94
		Total Amount of Current Suspended Payments	
		Day Sheet (Charges and Receipts) Report	94

Payment (continued)

Total Amount of Insurance Payments		Total Amount of Suspended Insurance Payments	
Insurance Carrier Production - Summary Report		Analysis Summary Report - Standard	12
138		Day Sheet Report	100
Operator Day Sheet Report	188	Analysis Summary Report - Daily	8
Provider A/R Totals - Daily Report	264	Total Amount of Suspended Payments	
Provider A/R Totals - Standard Report	266	Analysis Summary Report - Standard	12
Insurance Carrier Production - Full Report	136	Day Sheet Report	100
Total Amount of Insurance Payments Received		Analysis Summary Report - Daily	8
Insurance Transaction Analysis Report	148	Total Amount of Suspended Payments for Previous Month	
Total Amount of Last Payments for Payment Agreements		Day Sheet (Charges and Receipts) Report	94
Collections Manager List	70	Total Amount of Transactions	
Total Amount of Medicaid Payments		Credit Card Transaction Report	80
Operator Day Sheet Report	188	Total Amount of YTD Applied Payments	
Total Amount of MTD Applied Payments		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Total Amount of YTD Insurance Payments for Family	
Total Amount of MTD Suspended Payments		Family Ledger Report (Single Family)	120
Day Sheet (Charges and Receipts) Report	94	Family Ledger Report	118
Total Amount of Other Applied Insurance Payments		Total Amount of YTD Payments for Family	
Analysis Summary Report - Standard	12	Family Ledger Report (Single Family)	120
Day Sheet Report	100	Family Ledger Report	118
Analysis Summary Report - Daily	8	Total Amount of YTD Suspended Payments	
Total Amount of Other Applied Payments		Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Standard	12	Total Number of Insurance Payments Received	
Day Sheet Report	100	Insurance Transaction Analysis Report	148
Analysis Summary Report - Daily	8	Total Number of Missed Payments for Payment Agreements	
Total Amount of Patient Payments Received		Collections Manager List	70
Insurance Transaction Analysis Report	148	Total Number of Patient Payments Received	
Total Amount of Payment Agreement Payments Due		Insurance Transaction Analysis Report	148
Payment Agreement Report	224	Total Number of Payments	
Total Amount of Payment Agreement Payments Past Due		Truth in Lending Disclosure Statement	320
Payment Agreement Report	224	Total Number of Transactions	
Total Amount of Payment Type		Credit Card Transaction Report	80
Deposit Slip	108	Total Other Retroactive Payment Amount Collected for Financial Class Type	
Daily Summary Report	88	UDS - Patient Related Revenue Report	336
Total Amount of Payment Type for Clinic		Total Other Retroactive Payment Amount Collected for Patient	
Deposit Slip	108	UDS - Patient Related Revenue Report	336
Total Amount of Payment Type for Operator		Total Other Retroactive Payment Amount Collected for Payer Category	
Deposit Slip	108	UDS - Patient Related Revenue Report	336
Total Amount of Payments		Total Quantity of Payments	
Day Sheet (Receipts) Report	98	Payment Summary Report	226
Operator Day Sheet Report	188	Day Sheet (Receipts) Report	98
Payment Summary Report	226	Payment Agreement	
Provider A/R Totals - Daily Report	264	Amount Due for Payment Agreement	
Provider A/R Totals - Standard Report	266	Collections Manager List	70
Truth in Lending Disclosure Statement	320	Amount of Payment Agreements	
Daily Summary Report	88	Practice Analysis Report	242
Total Amount of Payments for Clinic		Date of Last Payment Agreement Payment	
Day Sheet (Receipts) Report	98	Letter Merge Reports	152
Total Amount of Payments for Initial Provider		Grace Period	
Day Sheet (Receipts) Report	98	Payment Agreement Report	224
Total Amount of Payments for Payment Type		Last Payment Agreement Note	
Day Sheet (Receipts) Report	98	Payment Agreement Report	224
Total Amount of Payments for Provider		Last Payment Agreement Payment Amount	
Day Sheet (Receipts) Report	98	Patient Route Slip	216
		Last Payment Agreement Payment Date	
		Patient Route Slip	216

Payment Agreement (continued)

Last Payment Amount for Payment Agreement Collections Manager List	70	Remaining Payment Agreement Amount Collections Manager List	70
Last Payment Date for Payment Agreement Collections Manager List	70	Total Amount Due for Payment Agreements Collections Manager List	70
Next Payment Agreement Payment Due Amount Patient Route Slip	216	Total Amount of Balances Remaining for Payment Agreements Payment Agreement Report	224
Next Payment Agreement Payment Due Date Patient Route Slip	216	Total Amount of Last Payments for Payment Agree- ments Collections Manager List	70
Next Payment Plan Payment Amount Letter Merge Reports	152	Total Amount of Payment Agreement Payments Due Payment Agreement Report	224
Next Payment Plan Payment Date Letter Merge Reports	152	Total Amount of Payment Agreement Payments Past Due Payment Agreement Report	224
Number of Missed Payment Agreement Payments Practice Analysis Report	242	Total Amount of Payment Agreements Payment Agreement Report	224
Number of Missed Payments for Payment Agreement Collections Manager List	70	Total Amount of Remaining Payment Agreements Collections Manager List	70
Number of Payment Agreement Payments Remaining Payment Agreement Report	224	Total Number of Missed Payments for Payment Agree- ments Collections Manager List	70
Payment Agreement Amount Payment Agreement Report	224	Total Number of Payment Agreements Payment Agreement Report	224
Payment Agreement Amount Past Due Payment Agreement Report	224	Payment Agreement Note Payment Plan Note	
Payment Agreement Date Truth in Lending Disclosure Statement	320	Patient Notes Report	208
Payment Agreement Report	224	Payment Status Payment Status	
Payment Agreement Interval Payment Agreement Report	224	Credit Card Transaction Report	80
Payment Agreement Last Payment Amount Payment Agreement Report	224	Payment Type Amount of Payment Type	
Payment Agreement Last Payment Date Payment Agreement Report	224	Payment Summary Report	226
Payment Agreement Next Payment Amount Payment Agreement Report	224	Average Amount of Payment Type Payment Summary Report	226
Payment Agreement Next Payment Date Payment Agreement Report	224	Average Payment Amount for Payment Type Day Sheet (Receipts) Report	98
Payment Agreement Payment Amount Payment Agreement Amortization Schedule	222	Payment Amount for Payment Type Day Sheet (Receipts) Report	98
Payment Agreement Payment Due Date Payment Agreement Amortization Schedule	222	Payment Type Daily Summary Report	88
Payment Agreement Payment Number Payment Agreement Amortization Schedule	222	Day Sheet (Receipts) Report	98
Payment Agreement Payment Portion Applied to Inter- est Payment Agreement Amortization Schedule	222	Deposit Slip	108
Payment Agreement Payment Portion Applied to Prin- ciple Payment Agreement Amortization Schedule	222	Credit Card Transaction Report	80
Payment Agreement Remaining Balance Payment Agreement Report	224	Payment Type Description Payment Summary Report	226
Payment Agreement Report	224	Payment Types Custom Practice Information Report	82
Payment Agreement Amortization Schedule	222	Percent of Payment Types Payment Summary Report	226
Payment Agreement Total Number of Payments Payment Agreement Report	224	Quantity of Payment Type Payment Summary Report	226
Payment Due Date Coupon Book - Payment Agreements	79	Quantity of Payments for Payment Type Day Sheet (Receipts) Report	98
Coupon Book - Future Due Payments	78	Total Amount of Payment Type Deposit Slip	108
Payment Plan Remaining Balance Letter Merge Reports	152	Daily Summary Report	88
Payment Plan Total Amount Letter Merge Reports	152	Total Amount of Payment Type for Clinic Deposit Slip	108
		Total Amount of Payment Type for Operator Deposit Slip	108

Payment Type (continued)

Total Amount of Payments for Payment Type	
Day Sheet (Receipts) Report	98
Total Number of Payment Type Items	
Deposit Slip	108
Total Number of Payment Type Items for Clinic	
Deposit Slip	108
Total Number of Payment Type Items for Operator	
Deposit Slip	108
Payor	
Payer Category	
UDS - Patient Related Revenue Report	336
Subtotal of Allowances for Payer Category	
UDS - Patient Related Revenue Report	336
Subtotal of Amount Collected for Payer Category	
UDS - Patient Related Revenue Report	336
Subtotal of Bad Debt Write-offs for Payer Category	
UDS - Patient Related Revenue Report	336
Subtotal of Charges for Payer Category	
UDS - Patient Related Revenue Report	336
Subtotal of Other Retroactive Payment Amount Collected for Payer Category	
UDS - Patient Related Revenue Report	336
Subtotal of Penalty or Payback Amount Collected for Payer Category	
UDS - Patient Related Revenue Report	336
Subtotal of Sliding Discounts for Payer Category	
UDS - Patient Related Revenue Report	336
Subtotal of Wrap Around or Reconciliation Amount Collected for Payer Category (Current Year)	
UDS - Patient Related Revenue Report	336
Subtotal of Wrap Around or Reconciliation Amount Collected for Payer Category (Previous Years)	
UDS - Patient Related Revenue Report	336
Total Amount Collected for Payer Category	
UDS - Patient Related Revenue Report	336
Total Amount of Allowances for Payer Category	
UDS - Patient Related Revenue Report	336
Total Amount of Bad Debt Write-offs for Payer Category	
UDS - Patient Related Revenue Report	336
Total Amount of Charges for Payer Category	
UDS - Patient Related Revenue Report	336
Total Amount of Sliding Discounts for Payer Category	
UDS - Patient Related Revenue Report	336
Total Other Retroactive Payment Amount Collected for Payer Category	
UDS - Patient Related Revenue Report	336
Total Penalty or Payback Amount Collected for Payer Category	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Payer Category (Current Year)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Payer Category (Previous Years)	
UDS - Patient Related Revenue Report	336
Payor ID	
Insurance Carrier Payor ID	
Provider IDs List	272
Payor ID	
Insurance Carrier List	132

Penalty

Penalty or Payback Amount Collected for Patient	
UDS - Patient Related Revenue Report	336
Subtotal of Penalty or Payback Amount Collected for Financial Class Type	
UDS - Patient Related Revenue Report	336
Subtotal of Penalty or Payback Amount Collected for Payer Category	
UDS - Patient Related Revenue Report	336
Total Penalty or Payback Amount Collected for Financial Class Type	
UDS - Patient Related Revenue Report	336
Total Penalty or Payback Amount Collected for Patient	
UDS - Patient Related Revenue Report	336
Total Penalty or Payback Amount Collected for Payer Category	
UDS - Patient Related Revenue Report	336
Pending	
Amount of Pending Estimated Primary Insurance Portions YTD for Family	
Treatment Case Report	314
Amount of Pending Estimated Primary Insurance Portions YTD for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Pending Estimated Secondary Insurance Portions YTD for Family	
Treatment Case Report	314
Amount of Pending Estimated Secondary Insurance Portions YTD for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Pending Claim	
Pending Claims	
Patient Route Slip	216
Percent	
Coverage Percent	
Standard Coverage Tables Report	310
Insurance Coverage Tables Report	144
Finance Charge Percent	
Payment Agreement Report	224
Insurance Coverage Percent (Basic) for Primary Insurance	
Patient Route Slip	216
Insurance Coverage Percent (Basic) for Secondary Insurance	
Patient Route Slip	216
Insurance Coverage Percent (Major) for Primary Insurance	
Patient Route Slip	216
Insurance Coverage Percent (Major) for Secondary Insurance	
Patient Route Slip	216
Insurance Coverage Percent (Orthodontics) for Primary Insurance	
Patient Route Slip	216
Insurance Coverage Percent (Orthodontics) for Secondary Insurance	
Patient Route Slip	216
Insurance Coverage Percent (Preventative) for Primary Insurance	
Patient Route Slip	216

Percent (continued)

Insurance Coverage Percent (Preventative) for Secondary Insurance		Percent of Married Patients	
Patient Route Slip	216	Practice Statistics Report	246
Late Charge Percent or Amount		Percent of Medicaid Procedures	
Truth in Lending Disclosure Statement	320	RVU Production Summary Report	298
Percent Broken Appointments		Production Summary Report	260
Appointment Statistics Report	20	Percent of Medicaid Procedures for Clinic	
Percent Collected		RVU Production Summary Report	298
Provider A/R Totals - Daily Report	264	Production Summary Report	260
Percent Collected for Provider		Percent of Medicaid Procedures for Provider	
Provider A/R Totals - Standard Report	266	RVU Production Summary Report	298
Provider A/R Totals - Daily Report	264	Production Summary Report	260
Percent for Provider		Percent of Non-Medicaid Procedures	
Oral Health Education Report	192	RVU Production Summary Report	298
Periodontal Exam Report	240	Production Summary Report	260
Initial Health History Report	130	Percent of Non-Medicaid Procedures for Clinic	
Percent Late Appointments		RVU Production Summary Report	298
Appointment Statistics Report	20	Production Summary Report	260
Percent of Accepted Cases		Percent of Non-Medicaid Procedures for Provider	
Practice Treatment Case Report	248	RVU Production Summary Report	298
Percent of Active Patient Guarantors		Production Summary Report	260
Practice Statistics Report	246	Percent of Non-patient Guarantors	
Percent of Active Patients		Practice Statistics Report	246
Practice Statistics Report	246	Percent of Other Patients	
Percent of Adjustment Type in Adjustment Type Category		Practice Statistics Report	246
Adjustment Summary Report	4	Percent of Patient Non-guarantors	
Percent of Amount Aged 0 - 30		Practice Statistics Report	246
Aging/Credit Balance Report	6	Percent of Patients 0 - 2 Years	
Percent of Amount Aged 121 - 150		Practice Statistics Report	246
Aging/Credit Balance Report	6	Percent of Patients 11 - 12 Years	
Percent of Amount Aged 151 - 180		Practice Statistics Report	246
Aging/Credit Balance Report	6	Percent of Patients 13 - 14 Years	
Percent of Amount Aged 31 - 60		Practice Statistics Report	246
Aging/Credit Balance Report	6	Percent of Patients 15 - 16 Years	
Percent of Amount Aged 61 - 90		Practice Statistics Report	246
Aging/Credit Balance Report	6	Percent of Patients 17 - 20 Years	
Percent of Amount Aged 90 - 120		Practice Statistics Report	246
Aging/Credit Balance Report	6	Percent of Patients 21 - 30 Years	
Percent of Amount Aged Over 180		Practice Statistics Report	246
Aging/Credit Balance Report	6	Percent of Patients 3 - 4 Years	
Percent of Appointments in Appointment Status for or Longer than Length of Time		Practice Statistics Report	246
Appointment Statistics Report	20	Percent of Patients 31 - 40 Years	
Percent of Caries Free Patients		Practice Statistics Report	246
Caries Prevalence and Periodontal Index Report	52	Percent of Patients 41 - 50 Years	
Percent of Completed Cases		Practice Statistics Report	246
Practice Treatment Case Report	248	Percent of Patients 5 - 6 Years	
Percent of Divorced Patients		Practice Statistics Report	246
Practice Statistics Report	246	Percent of Patients 51 - 60 Years	
Percent of Female Patients		Practice Statistics Report	246
Practice Statistics Report	246	Percent of Patients 61 - 70 Years	
Percent of Guarantor Portions		Practice Statistics Report	246
Aging/Credit Balance Report	6	Percent of Patients 7 - 8 Years	
Percent of Insurance Estimate Amounts		Practice Statistics Report	246
Aging/Credit Balance Report	6	Percent of Patients 71 - 80 Years	
Percent of Male Patients		Practice Statistics Report	246
Practice Statistics Report	246	Percent of Patients 81+ Years	
		Practice Statistics Report	246
		Percent of Patients 9 - 10 Years	
		Practice Statistics Report	246
		Percent of Patients Due for Prophy (Month and Year)	
		Practice Statistics Report	246
		Percent of Patients Eligible for Prophy Continuing Care	
		Practice Statistics Report	246

Percent (continued)

Percent of Patients for Provider Practice Statistics Report	246	Percent of Patients without a ZIP Code Practice Statistics Report	246
Percent of Patients in ZIP Code Practice Statistics Report	246	Percent of Patients without Dental and Medical Insurance Practice Statistics Report	246
Percent of Patients not on Prophy Continuing Care Practice Statistics Report	246	Percent of Patients without Dental Insurance Practice Statistics Report	246
Percent of Patients with Caries History Caries Prevalence and Periodontal Index Report	52	Percent of Patients without Medical Insurance Practice Statistics Report	246
Percent of Patients with Dental and Medical Insurance Practice Statistics Report	246	Percent of Payment Types Payment Summary Report	226
Percent of Patients with Dental Fluorosis Caries Prevalence and Periodontal Index Report	52	Percent of Pre-authorized Cases Practice Treatment Case Report	248
Percent of Patients with dmfs > 0 Caries Prevalence and Periodontal Index Report	52	Percent of Procedures RVU Production Summary Report	298
Percent of Patients with Highest CPITN Caries Prevalence and Periodontal Index Report	52	Production Summary Report	260
Percent of Patients with History of Decay Caries Prevalence and Periodontal Index Report	52	Percent of Procedures for Clinic RVU Production Summary Report	298
Percent of Patients with Loss of Attachment < 3 mm Caries Prevalence and Periodontal Index Report	52	Production Summary Report	260
Percent of Patients with Loss of Attachment >= 3 & < 5 mm Caries Prevalence and Periodontal Index Report	52	Percent of Procedures for Provider RVU Production Summary Report	298
Percent of Patients with Loss of Attachment >= 5 mm Caries Prevalence and Periodontal Index Report	52	Production Summary Report	260
Percent of Patients with Perio Pockets < 4 mm Caries Prevalence and Periodontal Index Report	52	Percent of Production from Referral Source Referral Analysis Report	282
Percent of Patients with Perio Pockets >= 4 & 6 mm Caries Prevalence and Periodontal Index Report	52	Percent of Production from Referral Sources Referral Analysis Report	282
Percent of Patients with Perio Pockets >= 6 mm Caries Prevalence and Periodontal Index Report	52	Percent of Receivables Practice Analysis Report	242
Percent of Patients with Primary Dental Insurance Only Practice Statistics Report	246	Percent of Referred Cases Practice Treatment Case Report	248
Percent of Patients with Primary Medical Insurance Practice Statistics Report	246	Percent of Referred New Patients (in Month and Year) Practice Statistics Report	246
Percent of Patients with Sealants Caries Prevalence and Periodontal Index Report	52	Percent of Scheduled Cases Practice Treatment Case Report	248
Percent of Patients with Secondary Dental Insurance Practice Statistics Report	246	Percent of Separated Patients Practice Statistics Report	246
Percent of Patients with Untreated Decay Caries Prevalence and Periodontal Index Report	52	Percent of Single Patients Practice Statistics Report	246
Percent of Patients with Using Tobacco Caries Prevalence and Periodontal Index Report	52	Percent of Suspended Credits Aging/Credit Balance Report	6
Percent of Patients without a Birth Date Entered Practice Statistics Report	246	Percent of Widowed Patients Practice Statistics Report	246
		Percent of Child Patients Practice Statistics Report	246
		Total Percent for All Clinics Oral Health Education Report	192
		Periodontal Exam Report	240
		Initial Health History Report	130
		Total Percent for Clinic Oral Health Education Report	192
		Periodontal Exam Report	240
		Initial Health History Report	130
		Perio	
		Perio Exam Graphic Chart	
		Perio - Combined Graphic & Data Chart Report	228
		Perio Graphic Chart	
		Perio - Graphic Chart Report	234
		Perio Exam	
		Perio Exam Comparison Data Chart	
		Perio - Combined Graphic & Data Chart Report	228

Perio Exam (continued)

Perio Exam Comparison Graphic Chart		Gingival Margin (Facial)	
Perio - Combined Graphic & Data Chart Report	228	Perio - Exam Comparison Report	232
Perio Exam Date		Perio - Combined Graphic & Data Chart Report	228
Perio - Combined Graphic & Data Chart Report	228	Gingival Margin (Lingual)	
Perio - Data Chart Report	230	Perio - Exam Comparison Report	232
Perio - Exam Comparison Report	232	Perio - Combined Graphic & Data Chart Report	228
Perio - Pocket Depths Only Report	236	Gingival Margin Graphic Chart	
Perio Exam List	238	Perio - Exam Comparison Report	232
Patient Notes Report	208	Mobility	
Perio Exam Note		Perio - Data Chart Report	230
Patient Notes Report	208	Perio - Combined Graphic & Data Chart Report	228
Perio Exam Provider Name		Mobility (Facial)	
Perio - Data Chart Report	230	Perio - Exam Comparison Report	232
Perio - Pocket Depths Only Report	236	Perio - Combined Graphic & Data Chart Report	228
Perio - Combined Graphic & Data Chart Report	228	Mobility (Lingual)	
Perio Measurement		Perio - Exam Comparison Report	232
Bleeding		Perio - Combined Graphic & Data Chart Report	228
Perio - Data Chart Report	230	Mucogingival Junction	
Perio - Combined Graphic & Data Chart Report	228	Perio - Data Chart Report	230
Bone Loss		Perio - Combined Graphic & Data Chart Report	228
Perio - Data Chart Report	230	Perio Measurement Change	
Perio - Combined Graphic & Data Chart Report	228	Perio - Exam Comparison Report	232
Clinical Attachment Level		Perio - Combined Graphic & Data Chart Report	228
Perio - Data Chart Report	230	Probing Depth (Facial)	
Perio - Combined Graphic & Data Chart Report	228	Perio - Data Chart Report	230
Clinical Attachment Level (Facial)		Perio - Exam Comparison Report	232
Perio - Exam Comparison Report	232	Perio - Pocket Depths Only Report	236
Perio - Combined Graphic & Data Chart Report	228	Perio - Combined Graphic & Data Chart Report	228
Clinical Attachment Level (Lingual)		Probing Depth (Lingual)	
Perio - Exam Comparison Report	232	Perio - Data Chart Report	230
Perio - Combined Graphic & Data Chart Report	228	Perio - Exam Comparison Report	232
Clinical Attachment Level Graphic Chart		Perio - Pocket Depths Only Report	236
Perio - Exam Comparison Report	232	Perio - Combined Graphic & Data Chart Report	228
Furcation Grade		Suppuration	
Perio - Data Chart Report	230	Perio - Data Chart Report	230
Perio - Combined Graphic & Data Chart Report	228	Perio - Combined Graphic & Data Chart Report	228
Furcation Involvement (Facial)		Permanent	
Perio - Exam Comparison Report	232	Permanent/Temporary	
Perio - Combined Graphic & Data Chart Report	228	Multi-Code List	182
Furcation Involvement (Lingual)		Phone	
Perio - Exam Comparison Report	232	Employer Phone Number	
Perio - Combined Graphic & Data Chart Report	228	Letter Merge Reports	152
Gingival Margin		Employers and Employed Patients Report	116
Perio - Data Chart Report	230	Guarantor Home Phone Number	
Perio - Combined Graphic & Data Chart Report	228	Collections Manager List	70
		Collections Manager List	70
		Future Due Payment Plan Report - Standard	128
		Patient Route Slip	216
		Payment Agreement Report	224
		Truth in Lending Disclosure Statement	320
		Aging/Credit Balance Report	6

Phone (continued)

Insurance Carrier Phone Number		Provider Phone Number	
Insurance Claim Aging Report	140	Patient Chart Printout	196
Insurance Eligibility Report	146	Referral Recap Report	284
Pre-Treatment Estimate Aging Report	252	Referral Slip	286
Provider IDs List	272	Walkout - Doctor's Statement	356
RVU Utilization Report	304	Patient Chart and Progress Notes Printout	194
Utilization Report	354	Referral Phone Number	
Insurance Carrier List	132	Referral Slip	286
Patient Home Phone Number		Referral Recap Report	284
As Soon As Possible List	22	Referred by Doctor/Other Phone Number	
Clinical Notes Report	64	Referred By Doctor/Other Report	288
Continuing Care Display List	76	Referred by Source Phone Number	
Daily Appointment List (DX1)	84	Letter Merge Reports	152
Daily Appointment List Report	86	Referred to Doctor Phone Number	
Day Sheet (Charges and Receipts) Report	94	Referred To Doctor Report	292
Day Sheet Report	100	Referred to Phone Number	
Letter Merge Reports	152	Letter Merge Reports	152
Patient Ledger Report	202	Referring Patient Home Phone Number	
Patient List	204	Referred By Patient Report	290
Patient List (Filtered)	206	Spouse Home Phone Number	
Patient Notes Report	208	Patient Questionnaire	214
Patient Questionnaire	214	Physical Activity Counseling	
Patient Route Slip	216	Number of Patients 3 - 17 Years who Received Physical Activity Counseling	
Prescription Printout	250	Clinical Quality Measures List	66
Referral Recap Report	284	Place of Service Code	
Referral Slip	286	Place of Service Code	
Treatment Plan Approval Report	316	Medical Code List	180
Treatment Plan Approval Status Report	318	Place of Service Code Description	
Unscheduled Appointment List (DX1)	344	Medical Code List	180
Unscheduled Appointment List (OM)	346	Plaque	
Unscheduled Treatment Plans (Condensed) Report	348	Plaque	
Unscheduled Treatment Plans (Detailed) Report	350	Perio - Data Chart Report	230
Appointment Book View Printout	14	Perio - Combined Graphic & Data Chart Report	228
Phone Number of Patient on Appointment		Pocket Depth	
Letter Merge Reports	152	Percent of Patients with Perio Pockets < 4 mm	
Practice Phone Extension		Caries Prevalence and Periodontal Index Report	52
Letter Merge Reports	152	Percent of Patients with Perio Pockets >= 4 & 6 mm	
Practice Phone Number		Caries Prevalence and Periodontal Index Report	52
Billing Statement	48	Percent of Patients with Perio Pockets >= 6 mm	
Continuing Care Cards - No Appointment	74	Caries Prevalence and Periodontal Index Report	52
Continuing Care Cards - with Appointment	75	Portion	
Coupon Book - Future Due Payments	78	Account Estimated Insurance Portion	
Coupon Book - Payment Agreements	79	Patient Route Slip	216
Letter Merge Reports	152	Amount of Dental Insurance Portion	
Patient Treatment Case Report	218	Patient Chart Printout	196
Perio - Combined Graphic & Data Chart Report	228	Amount of Estimated Insurance Portion	
Perio - Exam Comparison Report	232	Insurance Claim Aging Report	140
Perio - Graphic Chart Report	234	Amount of Office Portion	
Practice Organization List	244	Patient Treatment Case Report	218
Prescription Printout	250	Amount of Office Portion for Case	
Provider IDs List	272	Patient Treatment Case Report	218
Registration Information Report	294	Amount of Office Portion for Visit	
Truth in Lending Disclosure Statement	320	Patient Treatment Case Report	218
Walkout - Family Walkout	358	Amount of Patient Portion	
Appointment Reminder Cards	18	Patient Treatment Case Report	218
Provider Office Phone Number		Practice Treatment Case Report	248
Provider IDs List	272	Treatment Case Report	314

Portion (continued)

Patient Chart Printout	196	Payment Agreement Payment Portion Applied to Interest	
Amount of Patient Portion for Case		Payment Agreement Amortization Schedule	222
Practice Treatment Case Report	248	Payment Agreement Payment Portion Applied to Principle	
Patient Treatment Case Report	218	Payment Agreement Amortization Schedule	222
Amount of Patient Portion for Visit		Percent of Guarantor Portions	
Practice Treatment Case Report	248	Aging/Credit Balance Report	6
Treatment Case Report	314	Total Amount of Dental Insurance Portions	
Patient Treatment Case Report	218	Patient Chart Printout	196
Amount of Pending Estimated Primary Insurance Portions YTD for Family		Total Amount of Estimated Insurance Portion for Primary and Secondary Claims	
Treatment Case Report	314	Insurance Claim Aging Report	140
Amount of Pending Estimated Primary Insurance Portions YTD for Patient		Total Amount of Estimated Insurance Portion for Primary Claims	
Treatment Case Report	314	Insurance Claim Aging Report	140
Patient Treatment Case Report	218	Total Amount of Estimated Insurance Portion for Secondary Claims	
Amount of Primary Insurance Portion		Insurance Claim Aging Report	140
Practice Treatment Case Report	248	Total Amount of Guarantor Estimates	
Treatment Case Report	314	Collections Manager List	70
Patient Treatment Case Report	218	Total Amount of Guarantor Portions	
Amount of Primary Insurance Portion for Case		Aging/Credit Balance Report	6
Practice Treatment Case Report	248	Total Amount of Patient Portion for Case	
Patient Treatment Case Report	218	Treatment Case Report	314
Amount of Primary Insurance Portion for Visit		Total Amount of Patient Portions	
Practice Treatment Case Report	248	Patient Chart Printout	196
Treatment Case Report	314	Total Amount of Primary Insurance Portion for Case	
Patient Treatment Case Report	218	Treatment Case Report	314
Amount of Secondary Insurance Portion		Total Amount of Secondary Insurance Portion for Case	
Practice Treatment Case Report	248	Treatment Case Report	314
Treatment Case Report	314	Total Estimated Amount of Patient's Portion	
Patient Treatment Case Report	218	Patient Proposed Treatment Case Report (Your Care Plan)	212
Amount of Secondary Insurance Portion for Case		Total Estimated Insurance Portion	
Practice Treatment Case Report	248	Patient Proposed Treatment Case Report (Your Care Plan)	212
Patient Treatment Case Report	218		
Amount of Secondary Insurance Portion for Visit		Poverty Level	
Practice Treatment Case Report	248	Patient Poverty Level	
Treatment Case Report	314	Patient List (Filtered)	206
Patient Treatment Case Report	218	Poverty Level	
Co-pay Calculation for Insurance Portion		UDS - Patient Status Report	338
Insurance Coverage Tables Report	144	Practice	
Estimated Amount of Patient's Portion		Blue Cross/Blue Shield Number	
Patient Treatment Case Report	218	Practice Organization List	244
Treatment Case Report	314	Practice	
Patient Proposed Treatment Case Report (Your Care Plan)	212	Audit Report - Clinics	30
Estimated Guarantor Portion		Practice Address	
Patient Route Slip	216	Billing Statement	48
Estimated Insurance Portion		Continuing Care Cards - No Appointment	74
Patient Proposed Treatment Case Report (Your Care Plan)	212	Continuing Care Cards - with Appointment	75
Dental Encounters Report	106	Coupon Book - Future Due Payments	78
Estimated Patient Portion		Coupon Book - Payment Agreements	79
Patient Route Slip	216	Patient Chart and Progress Notes Printout	194
Guarantor Estimate Amount		Patient Chart Printout	196
Collections Manager List	70	Patient Treatment Case Report	218
Guarantor Portions		Perio - Combined Graphic & Data Chart Report	228
Aging/Credit Balance Report	6	Perio - Exam Comparison Report	232
Patient Estimated Insurance Portion		Perio - Graphic Chart Report	234
Patient Route Slip	216	Practice Organization List	244
		Prescription Printout	250

Practice (continued)

Provider IDs List	272
Referral Recap Report	284
Referral Slip	286
Truth in Lending Disclosure Statement	320
Walkout - Family Walkout	358
Appointment Reminder Cards	18
Practice Change	
Audit Report - Clinics	30
Practice City	
Registration Information Report	294
Practice City State and ZIP Code	
Letter Merge Reports	152
Practice Country	
Registration Information Report	294
Practice Fiscal Year Month	
Registration Information Report	294
Practice Name	
Billing Statement	48
Continuing Care Cards - No Appointment	74
Continuing Care Cards - with Appointment	75
Coupon Book - Future Due Payments	78
Coupon Book - Payment Agreements	79
Letter Merge Reports	152
Perio - Combined Graphic & Data Chart Report	228
Prescription Printout	250
Truth in Lending Disclosure Statement	320
Walkout - Family Walkout	358
Appointment Reminder Cards	18
Practice Phone Extension	
Letter Merge Reports	152
Practice Phone Number	
Billing Statement	48
Continuing Care Cards - No Appointment	74
Continuing Care Cards - with Appointment	75
Coupon Book - Future Due Payments	78
Coupon Book - Payment Agreements	79
Letter Merge Reports	152
Patient Treatment Case Report	218
Perio - Combined Graphic & Data Chart Report	228
Perio - Exam Comparison Report	232
Perio - Graphic Chart Report	234
Practice Organization List	244
Prescription Printout	250
Provider IDs List	272
Registration Information Report	294
Truth in Lending Disclosure Statement	320
Walkout - Family Walkout	358
Appointment Reminder Cards	18
Practice Signature	
Treatment Case Report	314
Practice State	
Registration Information Report	294
Practice Street Address	
Registration Information Report	294
Letter Merge Reports	152
Practice Title	
Registration Information Report	294
Audit Report - Clinics	30
Practice Title Change	
Audit Report - Clinics	30
Practice ZIP Code	
Registration Information Report	294
Pre-Authorization	
Percent of Pre-authorized Cases	
Practice Treatment Case Report	248
Pre-authorization Required	
Standard Coverage Tables Report	310
Insurance Coverage Tables Report	144
Pre-Treatment Estimate	
Pre-treatment Estimate Amount	
Patient Route Slip	216
Pre-Treatment Estimate Aging Report	252
Pre-Treatment Estimates Not Sent Report	254
Secondary Pre-Treatment Estimates Not Created Report	308
Insurance Transaction Analysis Report	148
Pre-treatment Estimate Date	
Pre-Treatment Estimates Not Sent Report	254
Pre-treatment Estimate Expiration Date	
Secondary Pre-Treatment Estimates Not Created Report	308
Pre-Treatment Estimates Not Sent Report	254
Pre-treatment Estimate On Hold Date	
Pre-Treatment Estimate Aging Report	252
Pre-treatment Estimate Re-sent Date	
Pre-Treatment Estimate Aging Report	252
Pre-treatment Estimate Sent Date	
Pre-Treatment Estimate Aging Report	252
Pre-treatment Estimate Tracer Date	
Pre-Treatment Estimate Aging Report	252
Primary Pre-treatment Estimate Date	
Secondary Pre-Treatment Estimates Not Created Report	308
Primary Pre-treatment Estimate Sent Date	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Secondary Pre-treatment Estimate Sent Date	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Total Amount for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 1 - 30 for Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 1 - 30 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 1 - 30 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 121 - 150 for Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 121 - 150 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252

Pre-Treatment Estimate (continued)

Total Amount of Account Balances Aged 121 - 150 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 151 - 180 for Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 151 - 180 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 151 - 180 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 181+ for Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 181+ for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 181+ for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 31 - 60 for Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 31 - 60 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 31 - 60 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 61 - 90 for Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 61 - 90 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 61 - 90 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 91 - 120 for Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 91 - 120 for Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 91 - 120 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances with Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances with Primary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances with Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252

Total Amount of Pre-treatment Estimates not Sent	
Pre-Treatment Estimates Not Sent Report	254
Total Amount of Primary Pre-treatment Estimates not Sent	
Pre-Treatment Estimates Not Sent Report	254
Total Amount of Secondary Pre-treatment Estimates not Created	
Secondary Pre-Treatment Estimates Not Created Report	308
Total Amount of Secondary Pre-treatment Estimates not Sent	
Pre-Treatment Estimates Not Sent Report	254

Preferred Contact Method

Patient Preferred Contact Method	
Patient List (Filtered)	206

Preferred Name

Patient's Preferred Name	
Letter Merge Reports	152
Appointment Book View Printout	14

Prescription

Dispense as Written	
Prescription Printout	250
Generic Substitution Permitted	
Prescription Printout	250
Number of Electronic Prescriptions	
Meaningful Use Measure Calculation List	156
Number of Patients with Electronic Prescriptions	
Meaningful Use Measure Calculation List	156
Number of Prescriptions	
Meaningful Use Measure Calculation List	156
Number of Prescriptions Ordered	
Meaningful Use Measure Calculation List	156
Number of Prescriptions Ordered Using CPOE (Computerized Provider Order Entry)	
Meaningful Use Measure Calculation List	156
Prescribed Medication	
Prescription Printout	250
Prescription Date	
Prescription Printout	250
Patient List (Filtered)	206
Prescription Details	
Prescription Printout	250
Prescription Note	
Prescription Printout	250

Preventative

Amount of Preventative Deductible Owed by Family to Primary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed to Primary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed to Secondary Insurance	
Patient Route Slip	216
Insurance Coverage Percent (Preventative) for Primary Insurance	
Patient Route Slip	216

Preventative (continued)

Insurance Coverage Percent (Preventative) for Secondary Insurance		Amount of Estimated Primary Insurance Benefits Remaining YTD for Patient	
Patient Route Slip	216	Treatment Case Report	314
Lifetime/Individual/Standard Preventative Deductible		Patient Treatment Case Report	218
Insurance Carrier List	132	Amount of Other Deductible Owed by Family to Primary Insurance	
Preventative Deductible Met		Patient Route Slip	216
Insurance Carrier List	132	Amount of Other Deductible Owed to Primary Insurance	
Preventative Deductible Owed by Family to Primary Insurance		Patient Route Slip	216
Treatment Case Report	314	Amount of Pending Estimated Primary Insurance Portions YTD for Family	
Preventative Deductible Owed by Family to Secondary Insurance		Treatment Case Report	314
Treatment Case Report	314	Amount of Pending Estimated Primary Insurance Portions YTD for Patient	
Preventative Deductible Owed by Patient to Primary Insurance		Treatment Case Report	314
Treatment Case Report	314	Patient Treatment Case Report	218
Patient Treatment Case Report	218	Amount of Preventative Deductible Owed by Family to Primary Insurance	
Preventative Deductible Owed by Patient to Secondary Insurance		Patient Route Slip	216
Treatment Case Report	314	Amount of Preventative Deductible Owed to Primary Insurance	
Patient Treatment Case Report	218	Patient Route Slip	216
Previous Balance		Amount of Primary Insurance Benefits Remaining	
Previous Balance		Unscheduled Treatment Plans (Detailed) Report	350
Day Sheet Report	100	Patient Route Slip	216
Day Sheet (Charges and Receipts) Report	94	Amount of Primary Insurance Benefits Used	
Previous Balance for Clinic		Patient Route Slip	216
Day Sheet Report	100	Amount of Primary Insurance Paid Benefits YTD for Family	
Previous Balance for Provider		Treatment Case Report	314
Day Sheet Report	100	Amount of Primary Insurance Paid Benefits YTD for Patient	
Day Sheet (Charges and Receipts) Report	94	Treatment Case Report	314
Previous Year		Patient Treatment Case Report	218
Subtotal of Wrap Around or Reconciliation Amount Collected for Financial Class Type (Previous Years)		Amount of Primary Insurance Portion	
UDS - Patient Related Revenue Report	336	Practice Treatment Case Report	248
Subtotal of Wrap Around or Reconciliation Amount Collected for Payer Category (Previous Years)		Treatment Case Report	314
UDS - Patient Related Revenue Report	336	Patient Treatment Case Report	218
Total Wrap Around or Reconciliation Amount Collected for Financial Class Type (Previous Years)		Amount of Primary Insurance Portion for Case	
UDS - Patient Related Revenue Report	336	Practice Treatment Case Report	248
Total Wrap Around or Reconciliation Amount Collected for Patient (Previous Years)		Patient Treatment Case Report	218
UDS - Patient Related Revenue Report	336	Amount of Primary Insurance Portion for Visit	
Total Wrap Around or Reconciliation Amount Collected for Payer Category (Previous Years)		Practice Treatment Case Report	248
UDS - Patient Related Revenue Report	336	Treatment Case Report	314
Wrap Around or Reconciliation Amount Collected for Patient (Previous Years)		Patient Treatment Case Report	218
UDS - Patient Related Revenue Report	336	Amount of Remaining Benefits for Primary Insurance	
Primary		Treatment Plan Approval Status Report	318
Amount of Annual Primary Insurance Plan Benefits for Family		Treatment Plan Approval Report	316
Treatment Case Report	314	Amount of Standard Deductible Owed by Family to Primary Insurance	
Amount of Annual Primary Insurance Plan Benefits for Patient		Patient Route Slip	216
Treatment Case Report	314	Amount of Standard Deductible Owed to Primary Insurance	
Patient Treatment Case Report	218	Patient Route Slip	216
Amount of Estimated Primary Insurance Benefits Remaining YTD for Family		Insurance Coverage Percent (Basic) for Primary Insurance	
Treatment Case Report	314	Patient Route Slip	216
		Insurance Coverage Percent (Major) for Primary Insurance	
		Patient Route Slip	216

Primary (continued)

Insurance Coverage Percent (Orthodontics) for Primary Insurance		Unscheduled Treatment Plans (Detailed) Report	350
Patient Route Slip	216	Letter Merge Reports	152
Insurance Coverage Percent (Preventative) for Primary Insurance		Primary Insurance Carrier Plan Employer	
Patient Route Slip	216	Patient Route Slip	216
Insurance Plan Group Number for Primary Insurance		Primary Insurance Estimated Amount	
Patient Questionnaire	214	Treatment Plan Approval Status Report	318
Insurance Plan Name and Address for Primary Insurance		Treatment Plan Approval Report	316
Patient Questionnaire	214	Primary Insurance Plan Group Number	
Last Eligibility Date for Primary Insurance Coverage		Treatment Plan Approval Report	316
Treatment Plan Approval Status Report	318	Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316	Patient Route Slip	216
Maximum Primary Insurance Benefit Amount		Primary Insurance Plan Renewal Month	
Patient Route Slip	216	Unscheduled Treatment Plans (Detailed) Report	350
Number of Encounters for Primary Providers		Primary Insurance Subscriber ID	
UDS - Encounters by Provider Report	328	Letter Merge Reports	152
Number of Patients with Primary Dental Insurance Only		Primary Medical Insurance Carrier Name	
Practice Statistics Report	246	Patient List	204
Number of Patients with Primary Medical Insurance		Primary Pre-treatment Estimate Date	
Practice Statistics Report	246	Secondary Pre-Treatment Estimates Not Created Report	308
Other Deductible Owed by Family to Primary Insurance		Primary Pre-treatment Estimate Sent Date	
Treatment Case Report	314	Treatment Plan Approval Status Report	318
Other Deductible Owed by Patient to Primary Insurance		Treatment Plan Approval Report	316
Treatment Case Report	314	Primary Production Amount	
Patient Treatment Case Report	218	Insurance Carrier Production - Full Report	136
Outstanding Primary Insurance Estimated Amount		Primary Production Amount for Insurance Plan	
Treatment Plan Approval Status Report	318	Insurance Carrier Production - Summary Report	138
Treatment Plan Approval Report	316	Insurance Carrier Production - Full Report	136
Patient Relationship to Subscriber for Primary Insurance		Primary Provider	
Patient Questionnaire	214	Patient Proposed Treatment Case Report (Your Care Plan)	212
Percent of Patients with Primary Dental Insurance Only		UDS - Insurance Financial Class Report (2013)	332
Practice Statistics Report	246	UDS - Medicaid/Medicare Report	334
Percent of Patients with Primary Medical Insurance		UDS - Sealant Statistics Report	340
Practice Statistics Report	246	UDS - Tobacco Use and Intervention Report	342
Preventative Deductible Owed by Family to Primary Ins		Patient List (Filtered)	206
Treatment Case Report	314	Primary Provider ID	
Preventative Deductible Owed by Patient to Primary Ins		Patient Route Slip	216
Treatment Case Report	314	Audit Report - Patients	34
Patient Treatment Case Report	218	Primary Provider ID Change	
Primary Claim Date		Audit Report - Patients	34
Secondary Insurance Claims Not Created Report	306	Standard Deductible Owed by Family to Primary Insurance	
Primary Dental Insurance Carrier Name		Treatment Case Report	314
Patient List	204	Standard Deductible Owed by Patient to Primary Insurance	
Primary Eligibility Date		Treatment Case Report	314
Appointment Book View Printout	14	Patient Treatment Case Report	218
Primary Insurance Benefits Expiration Date for Family		Subscriber Address for Primary Insurance	
Treatment Case Report	314	Patient Questionnaire	214
Primary Insurance Benefits Expiration Date for Patient		Subscriber Birth Date for Primary Insurance	
Treatment Case Report	314	Patient Questionnaire	214
Patient Treatment Case Report	218	Subscriber ID for Primary Insurance	
Primary Insurance Benefits Remaining		Patient Questionnaire	214
Letter Merge Reports	152	Subscriber Name for Primary Insurance	
Primary Insurance Benefits Renewal Month		Patient Route Slip	216
Patient Route Slip	216	Patient Questionnaire	214
Primary Insurance Carrier Name		Subscriber's Employer Address for Primary Insurance	
Patient Route Slip	216	Patient Questionnaire	214
Treatment Plan Approval Report	316		
Treatment Plan Approval Status Report	318		

Primary (continued)

Subscriber's Employer Name for Primary Insurance Patient Questionnaire	214	Total Amount of Primary Claims not Sent Insurance Claims Not Sent Report	142
Total Amount for Primary Pre-treatment Estimates Pre-Treatment Estimate Aging Report	252	Total Amount of Primary Pre-treatment Estimates not Sent Pre-Treatment Estimates Not Sent Report	254
Total Amount of Account Balances Aged 1 - 30 for Primary Pre-treatment Estimates Pre-Treatment Estimate Aging Report	252	Total Amount of Primary Production Insurance Carrier Production - Summary Report	138
Total Amount of Account Balances Aged 1 - 30 with Primary Claims Insurance Claim Aging Report	140	Insurance Carrier Production - Full Report	136
Total Amount of Account Balances Aged 121 - 150 for Primary Pre-treatment Estimates Pre-Treatment Estimate Aging Report	252	Principle	
Total Amount of Account Balances Aged 121 - 150 with Primary Claims Insurance Claim Aging Report	140	Payment Agreement Payment Portion Applied to Principle	
Total Amount of Account Balances Aged 151 - 180 for Primary Pre-treatment Estimates Pre-Treatment Estimate Aging Report	252	Payment Agreement Amortization Schedule	222
Total Amount of Account Balances Aged 151 - 180 with Primary Claims Insurance Claim Aging Report	140	Printed	
Total Amount of Account Balances Aged 181+ for Primary Pre-treatment Estimates Pre-Treatment Estimate Aging Report	252	Printed Patient Report	
Total Amount of Account Balances Aged 181+ with Primary Claims Pre-Treatment Estimate Aging Report	252	Audit Report - Combined	32
Total Amount of Account Balances Aged 181+ with Primary Claims Insurance Claim Aging Report	140	Prior Balance	
Total Amount of Account Balances Aged 31 - 60 for Primary Pre-treatment Estimates Pre-Treatment Estimate Aging Report	252	Prior Account Balance	
Total Amount of Account Balances Aged 31 - 60 with Primary Claims Insurance Claim Aging Report	140	Walkout - Family Walkout	358
Total Amount of Account Balances Aged 61 - 90 for Primary Pre-treatment Estimates Pre-Treatment Estimate Aging Report	252	Prior Treatment	
Total Amount of Account Balances Aged 61 - 90 with Primary Claims Insurance Claim Aging Report	140	Continuing Care Prior Treatment Date	
Total Amount of Account Balances Aged 91 - 120 for Primary Pre-treatment Estimates Pre-Treatment Estimate Aging Report	252	Continuing Care Display List	76
Total Amount of Account Balances Aged 91 - 120 with Primary Claims Insurance Claim Aging Report	140	Prior Work	
Total Amount of Account Balances with Primary Claims Insurance Claim Aging Report	140	Continuing Care Prior Work Date	
Total Amount of Account Balances with Primary Pre-treatment Estimates Pre-Treatment Estimate Aging Report	252	Letter Merge Reports	152
Total Amount of Estimated Insurance Portion for Primary and Secondary Claims Insurance Claim Aging Report	140	Priority	
Total Amount of Estimated Insurance Portion for Primary Claims Insurance Claim Aging Report	140	Case Priority	
Total Amount of Primary and Secondary Claims not Sent Insurance Claims Not Sent Report	142	Patient Treatment Case Report	218
		Probing Depth	
		Probing Depth (Facial)	
		Perio - Data Chart Report	230
		Perio - Exam Comparison Report	232
		Perio - Pocket Depths Only Report	236
		Perio - Combined Graphic & Data Chart Report	228
		Probing Depth (Lingual)	
		Perio - Data Chart Report	230
		Perio - Exam Comparison Report	232
		Perio - Pocket Depths Only Report	236
		Perio - Combined Graphic & Data Chart Report	228
		Problem	
		Number of Patients with Problems or Attestations of No Known Problems	
		Meaningful Use Measure Calculation List	156
		Problem Description	
		Patient List (Filtered)	206
		Problem Discovery Date	
		Patient List (Filtered)	206
		Procedure	
		ADA Code Description for Treatment-planned Procedure	
		Patient Chart Printout	196
		ADA Code Description of Treatment-planned Procedure	
		Referral Slip	286
		ADA Code of Treatment-planned Procedure	
		Referral Slip	286
		Amount of Completed Procedures for Patient	
		Procedures Not Attached to Insurance Report	258

Procedure (continued)

Amount of Lab Expenses for Medicaid Procedures for Clinic		Average Amount of Procedures	
RVU Production Summary Report	298	RVU Production Summary Report	298
Amount of Lab Expenses for Medicaid Procedures for Provider		Production Summary Report	260
RVU Production Summary Report	298	Average Amount of Procedures for Clinic	
Amount of Lab Expenses of Non-Medicaid Procedures for Clinic		RVU Production Summary Report	298
RVU Production Summary Report	298	Production Summary Report	260
Amount of Lab Expenses of Non-Medicaid Procedures for Provider		Average Amount of Procedures for Provider	
RVU Production Summary Report	298	RVU Production Summary Report	298
Amount of Lab Expenses of Procedures for Clinic		Production Summary Report	260
RVU Production Summary Report	298	Date of Completed Procedure	
Amount of Lab Expenses of Procedures for Provider		Walkout - Doctor's Statement	356
RVU Production Summary Report	298	Date of Treatment-planned Procedure	
Amount of Medicaid Procedures for Clinic		Referral Slip	286
RVU Production Summary Report	298	Deleted Procedure	
Production Summary Report	260	Audit Report - Combined	32
Amount of Medicaid Procedures for Provider		First Procedure	
RVU Production Summary Report	298	New Patient List	184
Production Summary Report	260	Inserted Procedure	
Amount of Non-Medicaid Procedures for Clinic		Audit Report - Combined	32
RVU Production Summary Report	298	Modified Procedure	
Production Summary Report	260	Audit Report - Combined	32
Amount of Non-Medicaid Procedures for Provider		Net RVU for Medicaid Procedures	
RVU Production Summary Report	298	RVU Production Summary Report	298
Production Summary Report	260	Net RVU of Medicaid Procedures for Clinic	
Amount of Procedure		RVU Production Summary Report	298
Treatment Plan Approval Status Report	318	Net RVU of Medicaid Procedures for Provider	
Treatment Plan Approval Report	316	RVU Production Summary Report	298
Amount of Procedures for Clinic		Net RVU of Non-Medicaid Procedures	
RVU Production Summary Report	298	RVU Production Summary Report	298
Production Summary Report	260	Net RVU of Non-Medicaid Procedures for Clinic	
Amount of Procedures for Provider		RVU Production Summary Report	298
RVU Production Summary Report	298	Net RVU of Non-Medicaid Procedures for Provider	
Production Summary Report	260	RVU Production Summary Report	298
Amount of Treatment-planned Procedure		Net RVU of Procedures	
Patient Chart Printout	196	RVU Production Summary Report	298
Average Amount of Medicaid Procedures		Net RVU of Procedures for Clinic	
RVU Production Summary Report	298	RVU Production Summary Report	298
Production Summary Report	260	Net RVU of Procedures for Provider	
Average Amount of Medicaid Procedures for Clinic		RVU Production Summary Report	298
RVU Production Summary Report	298	Next Appointment Procedure Amount	
Production Summary Report	260	Patient Route Slip	216
Average Amount of Medicaid Procedures for Provider		Next Appointment Procedure Date	
RVU Production Summary Report	298	Patient Route Slip	216
Production Summary Report	260	Number of Scheduled Treatment-planned Procedures	
Average Amount of Non-Medicaid Procedures		Practice Treatment Case Report	248
RVU Production Summary Report	298	Number of Unscheduled Treatment-planned Procedures	
Production Summary Report	260	Practice Treatment Case Report	248
Average Amount of Non-Medicaid Procedures for Clinic		Percent of Medicaid Procedures	
RVU Production Summary Report	298	RVU Production Summary Report	298
Production Summary Report	260	Production Summary Report	260
Average Amount of Non-Medicaid Procedures for Provider		Percent of Medicaid Procedures for Clinic	
RVU Production Summary Report	298	RVU Production Summary Report	298
Production Summary Report	260	Production Summary Report	260
Average Amount of Non-Medicaid Procedures for Provider		Percent of Medicaid Procedures for Provider	
RVU Production Summary Report	298	RVU Production Summary Report	298
Production Summary Report	260	Production Summary Report	260
Average Amount of Procedures		Percent of Non-Medicaid Procedures	
RVU Production Summary Report	298	RVU Production Summary Report	298
Production Summary Report	260	Production Summary Report	260

Procedure (continued)

Percent of Non-Medicaid Procedures for Clinic		Procedure RVU	
RVU Production Summary Report	298	RVU Utilization Report	304
Production Summary Report	260	Quantity of Medicaid Procedures for Clinic	
Percent of Non-Medicaid Procedures for Provider		RVU Production Summary Report	298
RVU Production Summary Report	298	Production Summary Report	260
Production Summary Report	260	Quantity of Medicaid Procedures for Provider	
Percent of Procedures		RVU Production Summary Report	298
RVU Production Summary Report	298	Production Summary Report	260
Production Summary Report	260	Quantity of Non-Medicaid Procedures for Clinic	
Percent of Procedures for Clinic		RVU Production Summary Report	298
RVU Production Summary Report	298	Production Summary Report	260
Production Summary Report	260	Quantity of Non-Medicaid Procedures for Provider	
Percent of Procedures for Provider		RVU Production Summary Report	298
RVU Production Summary Report	298	Production Summary Report	260
Production Summary Report	260	Quantity of Procedures for Provider	
Procedure Amount		RVU Production Summary Report	298
Patient List (Filtered)	206	Production Summary Report	260
Procedures Not Attached to Insurance Report	258	Replace Initial Zero of Procedure Code on Claims	
Production Summary Report	260	Insurance Carrier List	132
Provider Revenue - Allocations Report	274	Time Units	
Provider Revenue - Charges Report	276	Procedure Code List	256
Provider Revenue - Credits Report	278	Multi-Code List	182
RVU Production Summary Report	298	Tooth Number for Treatment-planned Procedure	
Audit Report - Combined	32	Patient Chart Printout	196
Procedure Date		Tooth Number of Treatment-Planned Procedure	
Audit Report - Transactions	38	Referral Slip	286
Billing Statement	48	Tooth Surface of Treatment-planned Procedure	
Day Sheet (Adjustments) Report	90	Referral Slip	286
Day Sheet (Charges and Receipts) Report	94	Total Amount of Completed Procedures	
Day Sheet (Receipts) Report	98	Walkout - Doctor's Statement	356
Day Sheet Report	100	Procedures Not Attached to Insurance Report	258
Operator Day Sheet Report	188	Total Amount of Lab Expenses of Medicaid Procedures	
Patient Chart and Progress Notes Printout	194	RVU Production Summary Report	298
Patient List (Filtered)	206	Total Amount of Lab Expenses of Non-Medicaid Procedures	
Patient Treatment Case Report	218	RVU Production Summary Report	298
Practice Treatment Case Report	248	Total Amount of Lab Expenses of Procedures	
Production Summary Report	260	RVU Production Summary Report	298
Provider Revenue - Allocations Report	274	Total Amount of Medicaid Procedures	
Provider Revenue - Charges Report	276	RVU Production Summary Report	298
Provider Revenue - Credits Report	278	Production Summary Report	260
RVU Day Sheet Report	296	Total Amount of Non-Medicaid Procedures	
RVU Production Summary Report	298	RVU Production Summary Report	298
Suspended Credits Report	312	Production Summary Report	260
Audit Report - Combined	32	Total Amount of Non-Medicaid Procedures	
Procedure Date Change		RVU Production Summary Report	298
Audit Report - Transactions	38	Production Summary Report	260
Procedure Date for Date of Service		Total Amount of Treatment-planned Procedures	
Letter Merge Reports	152	Practice Treatment Case Report	248
Procedure Description		Patient Chart Printout	196
Day Sheet Report	100	Total Quantity of Medicaid Procedures	
Audit Report - Combined	32	RVU Production Summary Report	298
Procedure Fee		Production Summary Report	260
Utilization Report	354	Total Quantity of Non-Medicaid Procedures	
RVU Utilization Report	304	RVU Production Summary Report	298
Procedure Note		Production Summary Report	260
Treatment Case Report	314	Total Quantity of Procedures	
Treatment Plan Approval Report	316	RVU Production Summary Report	298
Treatment Plan Approval Status Report	318	Production Summary Report	260
Patient Chart and Progress Notes Printout	194	Treatment-planned Procedure Amount	
		Unscheduled Treatment Plans (Detailed) Report	350

Procedure (continued)

Treatment-planned Procedure Date		Next Appointment Production Amount	
Unscheduled Treatment Plans (Detailed) Report		Patient Route Slip	216
350		Percent of Production from Referral Source	
Treatment Case Report	314	Referral Analysis Report	282
Procedure Code Category		Percent of Production from Referral Sources	
Procedure Code Category		Referral Analysis Report	282
Standard Coverage Tables Report	310	Primary Production Amount	
Insurance Coverage Tables Report	144	Insurance Carrier Production - Full Report	136
Production		Primary Production Amount for Insurance Plan	
Amount of - Adjustments (Production)		Insurance Carrier Production - Summary Report	138
Provider A/R Totals - Daily Report	264	Insurance Carrier Production - Full Report	136
Amount of - Adjustments (Production) for Provider		Production	
Provider A/R Totals - Standard Report	266	Provider A/R Totals - Standard Report	266
Provider A/R Totals - Daily Report	264	Provider A/R Totals - Daily Report	264
Amount of + Adjustments (Production)		Production Adjustments	
Provider A/R Totals - Daily Report	264	Provider A/R Totals - Standard Report	266
Amount of + Adjustments (Production) for Provider		Provider A/R Totals - Daily Report	264
Provider A/R Totals - Standard Report	266	Production Amount	
Provider A/R Totals - Daily Report	264	Referred By Doctor/Other Report	288
Amount of Debit Initial Balances (Production)		Referred By Patient Report	290
Provider A/R Totals - Daily Report	264	Provider A/R Totals - Daily Report	264
Amount of Debit Initial Balances (Production) for Prov		Production Amount for Provider	
Provider A/R Totals - Standard Report	266	Provider A/R Totals - Standard Report	266
Provider A/R Totals - Daily Report	264	Provider A/R Totals - Daily Report	264
Appointment Production Amount		Production at Clinic from Referral Source	
Appointment Book View Printout	14	Referral Analysis Report	282
Appointment Production Type		Production from Referral Source	
Audit Report - Appointments	26	Referral Analysis Report	282
Multi-Code List	182	Secondary Production Amount	
Procedure Code List	256	Insurance Carrier Production - Full Report	136
Appointment Book View Printout	14	Secondary Production Amount for Insurance Plan	
Appointment Production Type Change		Insurance Carrier Production - Summary Report	138
Audit Report - Appointments	26	Insurance Carrier Production - Full Report	136
Average Production per Patient		Total Amount of - Adjustments (Production)	
Analysis Summary Report - Standard	12	Provider A/R Totals - Standard Report	266
Day Sheet Report	100	Provider A/R Totals - Daily Report	264
Analysis Summary Report - Daily	8	Total Amount of + Adjustments (Production)	
Average Production per Patient at Clinic from Referral		Provider A/R Totals - Standard Report	266
Source		Provider A/R Totals - Daily Report	264
Referral Analysis Report	282	Total Amount of Debit Initial Balances (Production)	
Average Production per Patient for Clinic		Provider A/R Totals - Standard Report	266
Analysis Summary Report - Standard	12	Provider A/R Totals - Daily Report	264
Day Sheet Report	100	Total Amount of Primary Production	
Analysis Summary Report - Daily	8	Insurance Carrier Production - Summary Report	138
Average Production per Patient for Provider		Insurance Carrier Production - Full Report	136
Analysis Summary Report - Standard	12	Total Amount of Secondary Production	
Day Sheet Report	100	Insurance Carrier Production - Summary Report	138
Analysis Summary Report - Daily	8	Insurance Carrier Production - Full Report	136
Average Production Per Patient from Referral Source		Total Average Production per Patient	
Referral Analysis Report	282	Analysis Summary Report - Standard	12
Average Production Per Patient from Referral Sources		Analysis Summary Report - Daily	8
Referral Analysis Report	282	Total Average Production per Patient at Clinics from	
Average Production per Patient MTD		Referral Source	
Day Sheet (Charges and Receipts) Report	94	Referral Analysis Report	282
Average Production per Patient MTD for Provider		Total Production Amount	
Day Sheet (Charges and Receipts) Report	94	Provider A/R Totals - Standard Report	266
Current Average Production per Patient		Provider A/R Totals - Daily Report	264
Day Sheet (Charges and Receipts) Report	94		
Current Average Production per Patient for Provider			
Day Sheet (Charges and Receipts) Report	94		

Production (continued)

Total Production at Clinics from Referral Source			
Referral Analysis Report	282		
Total Production from Referral Sources			
Referral Analysis Report	282		
Production Type			
Appointment Production Type			
Audit Report - Appointments	26		
Multi-Code List	182		
Procedure Code List	256		
Appointment Book View Printout	14		
Appointment Production Type Change			
Audit Report - Appointments	26		
Projected			
Projected Amount of Remaining Benefits			
Treatment Plan Approval Status Report	318		
Treatment Plan Approval Report	316		
Projected Amount of Remaining Benefits for Secondary Insurance			
Treatment Plan Approval Status Report	318		
Treatment Plan Approval Report	316		
Prophy			
Number of Patients Eligible for Prophy Continuing Care			
Practice Statistics Report	246		
Number of Patients not on Prophy Continuing Care			
Practice Statistics Report	246		
Percent of Patients Due for Prophy (Month and Year)			
Practice Statistics Report	246		
Percent of Patients Eligible for Prophy Continuing Care			
Practice Statistics Report	246		
Percent of Patients not on Prophy Continuing Care			
Practice Statistics Report	246		
Prophylaxis			
Last Prophylaxis			
Patient Route Slip	216		
Last Prophylaxis Date			
Patient Route Slip	216		
Number of Patients Due for Prophy (on Month and Year)			
Practice Statistics Report	246		
Number of Patients Eligible for Prophy Continuing Care			
Practice Statistics Report	246		
Number of Patients not on Prophy Continuing Care			
Practice Statistics Report	246		
Percent of Patients Due for Prophy (Month and Year)			
Practice Statistics Report	246		
Provider			
20+ Years Old for Financial Class Type for Provider			
UDS - Insurance Financial Class Report	330		
Account Provider			
Collections Manager List	70		
Aged Amount 0 - 30 for Provider			
Aging/Credit Balance Report	6		
Aged Amount 121 - 150 for Provider			
Aging/Credit Balance Report	6		
Aged Amount 151 - 180 for Provider			
Aging/Credit Balance Report	6		
Aged Amount 31 - 60 for Provider			
Aging/Credit Balance Report	6		
Aged Amount 61 - 90 for Provider			
Aging/Credit Balance Report	6		
Aged Amount 90 - 120 for Provider			
Aging/Credit Balance Report	6		
Aged Amount Over 180 for Provider			
Aging/Credit Balance Report	6		
Amount Billed to Insurance for Provider			
Analysis Summary Report - Standard	12		
Day Sheet Report	100		
Analysis Summary Report - Daily	8		
Amount of - Adjustments (Collection) for Provider			
Provider A/R Totals - Standard Report	266		
Provider A/R Totals - Daily Report	264		
Amount of - Adjustments (Production) for Provider			
Provider A/R Totals - Standard Report	266		
Provider A/R Totals - Daily Report	264		
Amount of + Adjustments (Collection) for Provider			
Provider A/R Totals - Standard Report	266		
Provider A/R Totals - Daily Report	264		
Amount of + Adjustments (Production) for Provider			
Provider A/R Totals - Standard Report	266		
Provider A/R Totals - Daily Report	264		
Amount of Applied Credit Adjustments for Previous Month for Provider			
Day Sheet (Charges and Receipts) Report	94		
Amount of Applied Credit Adjustments for Provider			
Analysis Summary Report - Standard	12		
Day Sheet Report	100		
Analysis Summary Report - Daily	8		
Amount of Applied Insurance Payments for Provider			
Analysis Summary Report - Standard	12		
Day Sheet Report	100		
Analysis Summary Report - Daily	8		
Amount of Applied Payments for Previous Month for Provider			
Day Sheet (Charges and Receipts) Report	94		
Amount of Applied Payments for Provider			
Analysis Summary Report - Standard	12		
Day Sheet Report	100		
Analysis Summary Report - Daily	8		
Amount of Beginning Balances for Provider			
Analysis Summary Report - Standard	12		
Analysis Summary Report - Daily	8		
Amount of Charge Adjustments for Previous Month for Provider			
Day Sheet (Charges and Receipts) Report	94		
Day Sheet (Charges and Receipts) Report	94		
Amount of Charge Adjustments for Provider			
Analysis Summary Report - Standard	12		
Day Sheet Report	100		
Analysis Summary Report - Daily	8		
Amount of Charges Billed to Insurance for Previous Month for Provider			
Day Sheet (Charges and Receipts) Report	94		
Amount of Charges for Previous Month for Provider			
Day Sheet (Charges and Receipts) Report	94		
Amount of Charges for Provider			
Provider A/R Totals - Daily Report	264		
Provider A/R Totals - Standard Report	266		
Day Sheet Report	100		
Amount of Credit Initial Balances for Provider			
Analysis Summary Report - Standard	12		
Day Sheet Report	100		
Provider A/R Totals - Daily Report	264		

Provider (continued)

Provider A/R Totals - Standard Report	266	Amount of Lab Expenses for Medicaid Procedures for Provider	
Analysis Summary Report - Daily	8	RVU Production Summary Report	298
Amount of Credit Special Adjustments for Provider		Amount of Lab Expenses for Provider	
Analysis Summary Report - Standard	12	RVU Day Sheet Report	296
Day Sheet Report	100	Amount of Lab Expenses of Non-Medicaid Procedures for Provider	
Provider A/R Totals - Daily Report	264	RVU Production Summary Report	298
Provider A/R Totals - Standard Report	266	Amount of Lab Expenses of Procedures for Provider	
Analysis Summary Report - Daily	8	RVU Production Summary Report	298
Amount of Current Applied Credit Adjustments for Provider		Amount of Late Charges for Previous Month for Provider	
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Charges and Receipts) Report	94
Amount of Current Applied Payments for Provider		Amount of Late Charges for Provider	
Day Sheet (Charges and Receipts) Report	94	Analysis Summary Report - Standard	12
Amount of Current Charge Adjustments for Provider		Day Sheet Report	100
Day Sheet (Charges and Receipts) Report	94	Late Charge Report	150
Day Sheet (Charges and Receipts) Report	94	Provider A/R Totals - Daily Report	264
Amount of Current Charges Billed to Insurance for Provider		Provider A/R Totals - Standard Report	266
Day Sheet (Charges and Receipts) Report	94	Analysis Summary Report - Daily	8
Amount of Current Charges Compared to Fee Schedule for Provider		Amount of Medicaid Procedures for Provider	
Day Sheet (Charges and Receipts) Report	94	RVU Production Summary Report	298
Amount of Current Finance Charges for Provider		Production Summary Report	260
Day Sheet (Charges and Receipts) Report	94	Amount of MTD Applied Credit Adjustments for Provider	
Amount of Current Late Charges for Provider		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Amount of MTD Applied Payments for Provider	
Amount of Current Suspended Credit Adjustments for Provider		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Amount of MTD Charge Adjustments for Provider	
Amount of Current Suspended Payments for Provider		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Charges and Receipts) Report	94
Amount of Debit Initial Balances (Production) for Provider		Amount of MTD Charges Billed to Insurance for Provider	
Provider A/R Totals - Standard Report	266	Day Sheet (Charges and Receipts) Report	94
Provider A/R Totals - Daily Report	264	Amount of MTD Charges for Provider	
Amount of Debit Initial Balances for Provider		Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Standard	12	Amount of MTD Finance Charges for Provider	
Day Sheet Report	100	Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Daily	8	Amount of MTD Late Charges for Provider	
Amount of Debit Special Adjustments for Provider		Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Standard	12	Amount of MTD Suspended Credit Adjustments for Provider	
Day Sheet Report	100	Day Sheet (Charges and Receipts) Report	94
Provider A/R Totals - Daily Report	264	Amount of MTD Suspended Payments for Provider	
Provider A/R Totals - Standard Report	266	Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Daily	8	Amount of Net Change for Provider	
Amount of Ending Balances for Provider		Analysis Summary Report - Standard	12
Analysis Summary Report - Standard	12	Provider A/R Totals - Daily Report	264
Analysis Summary Report - Daily	8	Provider A/R Totals - Standard Report	266
Amount of Finance Charges for Previous Month for Provider		Analysis Summary Report - Daily	8
Day Sheet (Charges and Receipts) Report	94	Amount of Non-Medicaid Procedures for Provider	
Amount of Finance Charges for Provider		RVU Production Summary Report	298
Analysis Summary Report - Standard	12	Production Summary Report	260
Day Sheet Report	100	Amount of Other Applied Credit Adjustments for Provider	
Finance Charge Report	124	Analysis Summary Report - Standard	12
Provider A/R Totals - Daily Report	264	Day Sheet Report	100
Provider A/R Totals - Standard Report	266	Analysis Summary Report - Daily	8
Analysis Summary Report - Daily	8	Amount of Other Applied Credit Initial Balances for Provider	
Amount of Insurance Payments for Provider		Day Sheet Report	100
Provider A/R Totals - Standard Report	266		
Provider A/R Totals - Daily Report	264		

Provider (continued)

Amount of Other Applied Credit Special Adjustments for Provider		Amount of YTD Suspended Credit Adjustments for Provider	
Day Sheet Report	100	Day Sheet (Charges and Receipts) Report	94
Amount of Other Applied Insurance Payments for Provider		Amount of YTD Suspended Payments for Provider	
Analysis Summary Report - Standard	12	Day Sheet (Charges and Receipts) Report	94
Day Sheet Report	100	Appointment Provider	
Analysis Summary Report - Daily	8	Audit Report - Appointments	26
Amount of Other Applied Payments for Provider		Daily Appointment List (DX1)	84
Analysis Summary Report - Standard	12	Daily Appointment List Report	86
Day Sheet Report	100	Letter Merge Reports	152
Analysis Summary Report - Daily	8	Letter Merge Reports	152
Amount of Other Credit Initial Balances for Provider		Operatory Appointment List Report	190
Analysis Summary Report - Standard	12	Patient List (Filtered)	206
Analysis Summary Report - Daily	8	As Soon As Possible List	22
Amount of Other Credit Special Adjustments for Provider		Appointment Provider Change	
Analysis Summary Report - Standard	12	Audit Report - Appointments	26
Analysis Summary Report - Daily	8	Appointment Provider ID	
Amount of Payments for Provider		Letter Merge Reports	152
Provider A/R Totals - Standard Report	266	Appointment Book View Printout	14
Provider A/R Totals - Daily Report	264	Average Amount of Adjustments for Provider	
Amount of Procedures for Provider		Day Sheet (Adjustments) Report	90
RVU Production Summary Report	298	Average Amount of Medicaid Procedures for Provider	
Production Summary Report	260	RVU Production Summary Report	298
Amount of Suspended Credit Adjustments for Previous Month for Provider		Production Summary Report	260
Day Sheet (Charges and Receipts) Report	94	Average Amount of Non-Medicaid Procedures for Provider	
Amount of Suspended Credit Adjustments for Provider		RVU Production Summary Report	298
Analysis Summary Report - Standard	12	Production Summary Report	260
Day Sheet Report	100	Average Amount of Procedures for Provider	
Analysis Summary Report - Daily	8	RVU Production Summary Report	298
Amount of Suspended Insurance Payments for Provider		Production Summary Report	260
Analysis Summary Report - Standard	12	Average Charge per Patient for Provider	
Day Sheet Report	100	Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8	Day Sheet Report	100
Amount of Suspended Payments for Previous Month for Provider		Analysis Summary Report - Daily	8
Day Sheet (Charges and Receipts) Report	94	Average Charge per Patient MTD for Provider	
Amount of Suspended Payments for Provider		Day Sheet (Charges and Receipts) Report	94
Analysis Summary Report - Standard	12	Average Payment Amount for Initial Provider	
Day Sheet Report	100	Day Sheet (Receipts) Report	98
Analysis Summary Report - Daily	8	Average Payment Amount for Provider	
Amount of YTD Applied Credit Adjustments for Provider		Day Sheet (Receipts) Report	98
Day Sheet (Charges and Receipts) Report	94	Average Production per Patient for Provider	
Amount of YTD Applied Payments for Provider		Analysis Summary Report - Standard	12
Day Sheet (Charges and Receipts) Report	94	Day Sheet Report	100
Amount of YTD Charge Adjustments for Provider		Analysis Summary Report - Daily	8
Day Sheet (Charges and Receipts) Report	94	Average Production per Patient MTD for Provider	
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Charges and Receipts) Report	94
Amount of YTD Charges Billed to Insurance for Provider		Balance (as of a Date) for Provider	
Day Sheet (Charges and Receipts) Report	94	Day Sheet Report	100
Amount of YTD Charges for Provider		Day Sheet (Charges and Receipts) Report	94
Day Sheet (Charges and Receipts) Report	94	Beginning Balance for Provider	
Amount of YTD Finance Charges for Provider		Provider A/R Totals - Standard Report	266
Day Sheet (Charges and Receipts) Report	94	Provider A/R Totals - Daily Report	264
Amount of YTD Late Charges for Provider		Blue Cross/Blue Shield ID	
Day Sheet (Charges and Receipts) Report	94	Provider IDs List	272
		Charges for Provider	
		Analysis Summary Report - Standard	12
		Analysis Summary Report - Daily	8
		Clinical Note Provider	
		Clinical Notes Report	64
		Collection Amount for Provider	
		Provider A/R Totals - Standard Report	266
		Provider A/R Totals - Daily Report	264

Provider (continued)

Current Average Charge per Patient for Provider		Number of Medicaid and Medicare Patients in First Age Group for Provider	
Day Sheet (Charges and Receipts) Report	94	UDS - Medicaid/Medicare Report	334
Current Average Production per Patient for Provider		Number of Medicaid and Medicare Patients in Second Age Group for Provider	
Day Sheet (Charges and Receipts) Report	94	UDS - Medicaid/Medicare Report	334
Current Charges for Provider		Number of Medicaid Patients for Provider	
Day Sheet (Charges and Receipts) Report	94	UDS - Medicaid/Medicare Report	334
Current Number of New Patients for Provider		Number of Medicaid Patients in First Age Group for Provider	
Day Sheet (Charges and Receipts) Report	94	UDS - Medicaid/Medicare Report	334
Current Number of Patients Seen by Provider		Number of Medicaid Patients in Second Age Group for Provider	
Day Sheet (Charges and Receipts) Report	94	UDS - Medicaid/Medicare Report	334
DEA Number		Number of Medicare Patients for Provider	
Practice Organization List	244	UDS - Medicaid/Medicare Report	334
Denominator Codes for Provider		Number of Medicare Patients in First Age Group for Provider	
Oral Health Education Report	192	UDS - Medicaid/Medicare Report	334
Periodontal Exam Report	240	Number of Medicare Patients in Second Age Group for Provider	
Initial Health History Report	130	UDS - Medicaid/Medicare Report	334
Ending Balance for Provider		Number of New Patients for Provider	
Provider A/R Totals - Standard Report	266	Analysis Summary Report - Standard	12
Provider A/R Totals - Daily Report	264	Analysis Summary Report - Daily	8
Initial Provider		Number of New Patients from Previous Month for Provider	
Day Sheet (Receipts) Report	98	Day Sheet (Charges and Receipts) Report	94
Medicaid Number		Number of New Patients MTD for Provider	
Practice Organization List	244	Day Sheet (Charges and Receipts) Report	94
Net Change in Balance for Provider		Number of New Patients YTD for Provider	
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Charges and Receipts) Report	94
Net Difference of Current Charges and Fee Schedule for Provider		Number of Other Gender for Provider	
Day Sheet (Charges and Receipts) Report	94	UDS - Age/Gender Report	322
Net RVU for Provider		Number of Participating Providers	
RVU Day Sheet Report	296	Insurance Carrier List	132
Net RVU of Medicaid Procedures for Provider		Number of Patients for Provider	
RVU Production Summary Report	298	Practice Statistics Report	246
Net RVU of Non-Medicaid Procedures for Provider		Number of Patients Seen by Provider	
RVU Production Summary Report	298	Analysis Summary Report - Standard	12
Net RVU of Procedures for Provider		Day Sheet Report	100
RVU Production Summary Report	298	Analysis Summary Report - Daily	8
Next Appointment Provider ID		Number of Patients Seen MTD by Provider	
Patient Route Slip	216	Day Sheet (Charges and Receipts) Report	94
Next Continuing Care Appointment Provider		Number of Patients with Moderate to High Risk of Caries for Provider	
Letter Merge Reports	152	UDS - Sealant Statistics Report	340
NPI Number		Number of Patients with Moderate to High Risk of Caries who Got Sealants on Permanent First Molars for Provider	
Practice Organization List	244	UDS - Sealant Statistics Report	340
Number <19 Years Old for Financial Class Type for Provider		Number of Patients with Status for Provider	
UDS - Insurance Financial Class Report	330	UDS - Patient Status Report	338
Number of All Genders for Provider		Number of Unknown Gender for Provider	
UDS - Age/Gender Report	322	UDS - Age/Gender Report	322
Number of Charts Sampled for Provider		Number of Users for Financial Class Type for Provider	
UDS - Sealant Statistics Report	340	UDS - Insurance Financial Class Report	330
Number of Encounters for Primary Providers		Numerator Codes for Provider	
UDS - Encounters by Provider Report	328	Oral Health Education Report	192
Number of Encounters for Secondary Providers		Periodontal Exam Report	240
UDS - Encounters by Provider Report	328	Initial Health History Report	130
Number of Females for Provider			
UDS - Age/Gender Report	322		
Number of Males for Provider			
UDS - Age/Gender Report	322		
Number of Medicaid and Medicare Patients for Provider			
UDS - Medicaid/Medicare Report	334		

Provider (continued)

Percent Collected for Provider		UDS - Patient Status Report	338
Provider A/R Totals - Standard Report	266	Aging/Credit Balance Report	6
Provider A/R Totals - Daily Report	264	Provider Address	
Percent for Provider		Walkout - Doctor's Statement	356
Oral Health Education Report	192	Provider Class	
Periodontal Exam Report	240	Practice Organization List	244
Initial Health History Report	130	Provider IDs List	272
Percent of Medicaid Procedures for Provider		Audit Report - Providers/Staff	36
RVU Production Summary Report	298	Provider Class Change	
Production Summary Report	260	Audit Report - Providers/Staff	36
Percent of Non-Medicaid Procedures for Provider		Provider DEA Number	
RVU Production Summary Report	298	Prescription Printout	250
Production Summary Report	260	Provider Drug ID	
Percent of Patients for Provider		Provider IDs List	272
Practice Statistics Report	246	Provider Fee Schedule	
Percent of Procedures for Provider		Practice Organization List	244
RVU Production Summary Report	298	Provider IDs List	272
Production Summary Report	260	Audit Report - Providers/Staff	36
Perio Exam Provider Name		Provider Fee Schedule Change	
Perio - Data Chart Report	230	Audit Report - Providers/Staff	36
Perio - Pocket Depths Only Report	236	Provider ID	
Perio - Combined Graphic & Data Chart Report	228	Audit Report - Providers/Staff	36
Previous Balance for Provider		Audit Report - Transactions	38
Day Sheet Report	100	Day Sheet (Adjustments) Report	90
Day Sheet (Charges and Receipts) Report	94	Day Sheet (Charges and Receipts) Report	94
Primary Provider		Day Sheet Report	100
Patient Proposed Treatment Case Report (Your		Deposit Slip	108
Care Plan)	212	Finance Charge Report	124
UDS - Insurance Financial Class Report (2013)	332	Initial Health History Report	130
UDS - Medicaid/Medicare Report	334	Insurance Carrier List	132
UDS - Sealant Statistics Report	340	Insurance Carrier Production - Full Report	136
UDS - Tobacco Use and Intervention Report	342	Insurance Claims Not Sent Report	142
Patient List (Filtered)	206	Late Charge Report	150
Primary Provider ID		New Patient List	184
Patient Route Slip	216	Office Journal Report	186
Audit Report - Patients	34	Operator Day Sheet Report	188
Primary Provider ID Change		Oral Health Education Report	192
Audit Report - Patients	34	Patient Chart and Progress Notes Printout	194
Production Amount for Provider		Patient List	204
Provider A/R Totals - Standard Report	266	Payment Agreement Report	224
Provider A/R Totals - Daily Report	264	Periodontal Exam Report	240
Provider		Practice Organization List	244
Analysis Summary Report - Daily	8	Practice Statistics Report	246
Analysis Summary Report - Standard	12	Practice Treatment Case Report	248
Audit Report - Combined	32	Practice Treatment Case Report	248
Day Sheet (Adjustments) Report	90	Pre-Treatment Estimates Not Sent Report	254
Day Sheet (Receipts) Report	98	Procedures Not Attached to Insurance Report	258
Day Sheet Report	100	Provider IDs List	272
Finance Charge Report	124	Provider Revenue - Allocations Report	274
Late Charge Report	150	Provider Revenue - Charges Report	276
Patient Health Assessment Report	198	Provider Revenue - Credits Report	278
Patient List (Filtered)	206	Provider Revenue - Summary Report	280
Production Summary Report	260	RVU Utilization Report	304
Provider A/R Totals - Daily Report	264	Treatment Case Report	314
Provider A/R Totals - Standard Report	266	Treatment Plan Approval Report	316
RVU Day Sheet Report	296	Treatment Plan Approval Status Report	318
RVU Production Summary Report	298	Unscheduled Appointment List (DX1)	344
UDS - Age/Gender Report	322	Unscheduled Appointment List (OM)	346
UDS - Insurance Financial Class Report	330	Utilization Report	354
		Appointment Cycle Time Report	16

Provider (continued)

Provider ID Change		Provider Social Security Number	
Audit Report - Transactions	38	Practice Organization List	244
Audit Report - Providers/Staff	36	Provider IDs List	272
Provider ID Code		Audit Report - Providers/Staff	36
Provider IDs List	272	Provider Social Security Number Change	
Insurance Carrier List	132	Audit Report - Providers/Staff	36
Provider ID Number		Provider Social Security Number or TIN Number	
Insurance Carrier List	132	Walkout - Doctor's Statement	356
Insurance Transaction Analysis Report	148	Provider Specialty	
Provider IDs List	272	Provider IDs List	272
Continuing Care Display List	76	Provider State ID	
Provider License Number		Provider IDs List	272
Walkout - Doctor's Statement	356	Provider TIN Number	
Provider Medicaid Number		Provider IDs List	272
Provider IDs List	272	Provider Title	
Provider Name		Practice Organization List	244
Audit Report - Providers/Staff	36	Provider IDs List	272
Document Center Document	112	Letter Merge Reports	152
Insurance Carrier List	132	Provider's Signature	
Letter Merge Reports	152	Perio - Exam Comparison Report	232
Patient Chart and Progress Notes Printout	194	Perio - Graphic Chart Report	234
Patient Chart Printout	196	Perio - Combined Graphic & Data Chart Report	228
Patient Treatment Case Report	218	Quantity of Adjustments for Provider	
Perio - Combined Graphic & Data Chart Report	228	Day Sheet (Adjustments) Report	90
Perio - Exam Comparison Report	232	Quantity of Medicaid Procedures for Provider	
Perio - Graphic Chart Report	234	RVU Production Summary Report	298
Practice Organization List	244	Production Summary Report	260
Practice Statistics Report	246	Quantity of Non-Medicaid Procedures for Provider	
Prescription Printout	250	RVU Production Summary Report	298
Provider IDs List	272	Production Summary Report	260
Referral Recap Report	284	Quantity of Payments for Initial Provider	
Referral Slip	286	Day Sheet (Receipts) Report	98
Treatment Case Report	314	Quantity of Payments for Provider	
Walkout - Doctor's Statement	356	Day Sheet (Receipts) Report	98
Appointment Reminder Cards	18	Quantity of Procedures for Provider	
Provider Name Change		RVU Production Summary Report	298
Audit Report - Providers/Staff	36	Production Summary Report	260
Provider NPI Number		Rendering Provider NPI Number	
Provider IDs List	272	Dental Encounters Report	106
Prescription Printout	250	Revenue for Provider from Credit Adjustments	
Provider Number		Provider Revenue - Charges Report	276
Provider IDs List	272	Provider Revenue - Credits Report	278
Practice Organization List	244	Provider Revenue - Summary Report	280
Provider Office Phone Number		Provider Revenue - Allocations Report	274
Provider IDs List	272	Revenue for Provider from Insurance	
Provider Phone Number		Provider Revenue - Charges Report	276
Patient Chart Printout	196	Provider Revenue - Credits Report	278
Referral Recap Report	284	Provider Revenue - Summary Report	280
Referral Slip	286	Provider Revenue - Allocations Report	274
Walkout - Doctor's Statement	356	Revenue for Provider from Non-insurance Sources	
Patient Chart and Progress Notes Printout	194	Provider Revenue - Charges Report	276
Provider RVU Schedule		Provider Revenue - Credits Report	278
Provider IDs List	272	Provider Revenue - Summary Report	280
Practice Organization List	244	Provider Revenue - Allocations Report	274
Provider Signature		RVU for Provider	
Treatment Case Report	314	RVU Day Sheet Report	296
Prescription Printout	250	Secondary Provider ID	
		Patient Route Slip	216
		Specialty	
		Practice Organization List	244

Provider (continued)

State ID		Number of Radiology Orders Recorded Using CPOE (Computerized Provider Order Entry)	
Practice Organization List	244	Meaningful Use Measure Calculation List	156
Total Amount of Adjustments for Provider		Rate	
Day Sheet (Adjustments) Report	90	Annual Percentage Rate	
Total Amount of Payments for Initial Provider		Truth in Lending Disclosure Statement	320
Day Sheet (Receipts) Report	98	Interest Rate	
Total Amount of Payments for Provider		Truth in Lending Disclosure Statement	320
Day Sheet (Receipts) Report	98	Re-sent	
Total Number of New Patients for Provider		Claim Re-sent Date	
Day Sheet Report	100	Insurance Claim Aging Report	140
Total Revenue for Provider		Pre-treatment Estimate Re-sent Date	
Provider Revenue - Charges Report	276	Pre-Treatment Estimate Aging Report	252
Provider Revenue - Credits Report	278	Reason	
Provider Revenue - Summary Report	280	Appointment Reason	
Provider Revenue - Allocations Report	274	As Soon As Possible List	22
Unique Patient Count for Provider		Daily Appointment List (DX1)	84
RVU Day Sheet Report	296	Daily Appointment List Report	86
Unique Visit Count for Provider		Letter Merge Reports	152
RVU Day Sheet Report	296	Operatory Appointment List Report	190
Provider Class		Unscheduled Appointment List (DX1)	344
20+ Years Old for Financial Class Type for Provider		Unscheduled Appointment List (OM)	346
UDS - Insurance Financial Class Report	330	Walkout - Family Walkout	358
Provider Class		Appointment Book View Printout	14
Practice Organization List	244	Future Appointment Reason	
Provider IDs List	272	Patient Route Slip	216
Audit Report - Providers/Staff	36	Next Continuing Care Appointment Reason	
Provider Class Change		Letter Merge Reports	152
Audit Report - Providers/Staff	36	Receivables	
Provider ID		Current Receivables	
Future Appointment Provider ID		Practice Analysis Report	242
Patient Route Slip	216	Percent of Receivables	
Provider ID Code		Practice Analysis Report	242
Provider ID Code		Receivables Aged 31 - 60	
Provider IDs List	272	Practice Analysis Report	242
Insurance Carrier List	132	Receivables Aged 61 - 90	
Provider Number		Practice Analysis Report	242
Provider Number		Receivables Aged Over 90	
Provider IDs List	272	Practice Analysis Report	242
Practice Organization List	244	Total Receivables	
Provider Specialty		Practice Analysis Report	242
Provider Specialty		Received Date	
Provider IDs List	272	Claim Payment Received Date	
Pulse		Insurance Transaction Analysis Report	148
Pulse		Reconciliation	
Patient Health Assessment Report	198	Number of TCs (Transition of Care) and Referrals where Clinical Information Reconciliation Was Performed	
Question		Meaningful Use Measure Calculation List	156
Questions		Subtotal of Wrap Around or Reconciliation Amount Col- lected for Financial Class Type (Current Year)	
Patient Questionnaire	214	UDS - Patient Related Revenue Report	336
Race		Subtotal of Wrap Around or Reconciliation Amount Col- lected for Financial Class Type (Previous Years)	
Patient Race		UDS - Patient Related Revenue Report	336
Patient List (Filtered)	206	Subtotal of Wrap Around or Reconciliation Amount Col- lected for Payer Category (Current Year)	
Race		UDS - Patient Related Revenue Report	336
UDS - Patient Status Report	338	Subtotal of Wrap Around or Reconciliation Amount Col- lected for Payer Category (Previous Years)	
Radiology		UDS - Patient Related Revenue Report	336
Number of Diagnostic Imaging Orders Recorded Using CPOE (Computerized Provider Order Entry)		Subtotal of Wrap Around or Reconciliation Amount Col- lected for Payer Category (Previous Years)	
Meaningful Use Measure Calculation List	156	UDS - Patient Related Revenue Report	336
Number of Radiology Orders			
Meaningful Use Measure Calculation List	156		

Reconciliation (continued)

Total Wrap Around or Reconciliation Amount Collected for Financial Class Type (Current Year)		Last Referred By Source and Date	
UDS - Patient Related Revenue Report	336	Patient Route Slip	216
Total Wrap Around or Reconciliation Amount Collected for Financial Class Type (Previous Years)		Last Referred To Name and Date	
UDS - Patient Related Revenue Report	336	Patient Route Slip	216
Total Wrap Around or Reconciliation Amount Collected for Patient (Current Year)		Middle Initial of Referred by Source	
UDS - Patient Related Revenue Report	336	Letter Merge Reports	152
Total Wrap Around or Reconciliation Amount Collected for Patient (Previous Years)		Number of Patients at Clinic from Referral Source	
UDS - Patient Related Revenue Report	336	Referral Analysis Report	282
Total Wrap Around or Reconciliation Amount Collected for Payer Category (Current Year)		Number of Patients from Referral Source	
UDS - Patient Related Revenue Report	336	Referral Analysis Report	282
Total Wrap Around or Reconciliation Amount Collected for Payer Category (Previous Years)		Number of Referrals	
UDS - Patient Related Revenue Report	336	Referred By Patient Report	290
Wrap Around or Reconciliation Amount Collected for Patient (Current Year)		Referred To Doctor Report	292
UDS - Patient Related Revenue Report	336	Patient Route Slip	216
Wrap Around or Reconciliation Amount Collected for Patient (Previous Years)		Number of Referrals Listed	
UDS - Patient Related Revenue Report	336	Referred To Doctor Report	292
		Referred By Patient Report	290
		Number of Referred by Doctor/Other Patients Listed	
		Referred By Doctor/Other Report	288
		Number of Referred New Patients (in Month and Year)	
		Practice Statistics Report	246
		Number of TCs (Transition of Care) and Referrals	
		Meaningful Use Measure Calculation List	156
		Number of TCs (Transition of Care) and Referrals where Clinical Information Reconciliation Was Performed	
		Meaningful Use Measure Calculation List	156
		Number of TCs (Transition of Care) and Referrals where Electronic SCs (Summary of Care) Provided	
		Meaningful Use Measure Calculation List	156
		Number of TCs (Transition of Care) and Referrals where SCs (Summary of Care) Provided	
		Meaningful Use Measure Calculation List	156
		Number of TCs (Transition of Care) and Referrals where SCs (Summary of Care) Was Exchanged Electronically	
		Meaningful Use Measure Calculation List	156
		Percent of Production from Referral Source	
		Referral Analysis Report	282
		Percent of Production from Referral Sources	
		Referral Analysis Report	282
		Percent of Referred New Patients (in Month and Year)	
		Practice Statistics Report	246
		Production at Clinic from Referral Source	
		Referral Analysis Report	282
		Production from Referral Source	
		Referral Analysis Report	282
		Referral Address	
		Referral Slip	286
		Referral Recap Report	284
		Referral Date	
		Referral Slip	286
		Referred By Doctor/Other Report	288
		Referred By Patient Report	290
		Referred To Doctor Report	292
		Referral Recap Report	284
		Referral Name	
		Referral Slip	286
		Referral Recap Report	284
		Referral Note	
		Referral Slip	286
		Referral Recap Report	284

Referral (continued)

Referral Phone Number		Referred to Doctor Name	
Referral Slip	286	Referred To Doctor Report	292
Referral Recap Report	284	Document Center Document	112
Referral Source		Referred to Doctor Phone Number	
Referral Analysis Report	282	Referred To Doctor Report	292
Referral Source Name		Referred to First Name	
Patient Questionnaire	214	Letter Merge Reports	152
Referral Status		Referred to Last Name	
Referred To Doctor Report	292	Letter Merge Reports	152
Referred By (RB)		Referred to Middle Initial	
Unscheduled Treatment Plans (Detailed) Report	350	Letter Merge Reports	152
Referred By Date		Referred to Phone Number	
New Patient List	184	Letter Merge Reports	152
Referred by Doctor/Other Address		Referred to Salutation	
Referred By Doctor/Other Report	288	Letter Merge Reports	152
Referred by Doctor/Other Gratuity Given		Referred to Title	
Referred By Doctor/Other Report	288	Letter Merge Reports	152
Referred by Doctor/Other Last Gratuity Date		Referring Patient Address	
Referred By Doctor/Other Report	288	Referred By Patient Report	290
Referred by Doctor/Other Name		Referring Patient Home Phone Number	
Referred By Doctor/Other Report	288	Referred By Patient Report	290
Document Center Document	112	Referring Patient Name	
Referred by Doctor/Other Phone Number		Referred By Patient Report	290
Referred By Doctor/Other Report	288	Scheduled Date	
Referred by Doctor/Other Total Referrals		Referred To Doctor Report	292
Referred By Doctor/Other Report	288	Total Average Production per Patient at Clinics from Referral Source	
Referred By Name		Referral Analysis Report	282
New Patient List	184	Total Number of Patients at Clinics from Referral Source	
Referred by Patient Name		Referral Analysis Report	282
Document Center Document	112	Total Number of Patients from Referral Sources	
Referred by Source Address		Referral Analysis Report	282
Letter Merge Reports	152	Total Number of Referrals	
Referred by Source Phone Number		Referred To Doctor Report	292
Letter Merge Reports	152	Referred By Patient Report	290
Referred by Source Salutation		Total Number of Referrals Listed	
Letter Merge Reports	152	Referred To Doctor Report	292
Referred by Source Title		Total Number of Referred by Doctor/Other Patients Listed	
Letter Merge Reports	152	Referred By Doctor/Other Report	288
Referred Date of Treatment Still in Progress		Total Number of Referred by Doctor/Other Referrals	
Referral Recap Report	284	Referred By Doctor/Other Report	288
Referred Patient		Total Number Referrals Listed	
Referred By Patient Report	290	Referred By Patient Report	290
Referred Patient Name		Total Production at Clinics from Referral Source	
Referred To Doctor Report	292	Referral Analysis Report	282
Referred Patients (Average)		Total Production from Referral Sources	
Practice Analysis Report	242	Referral Analysis Report	282
Referred Patients (for Date Range)		Referred	
Practice Analysis Report	242	Number of Referred New Patients (in Month and Year)	
Referred Patients (MTD)		Practice Statistics Report	246
Practice Analysis Report	242	Percent of Referred Cases	
Referred Patients (YTD)		Practice Treatment Case Report	248
Practice Analysis Report	242	Percent of Referred New Patients (in Month and Year)	
Referred To (RT)		Practice Statistics Report	246
Unscheduled Treatment Plans (Detailed) Report	350	Referred Date of Treatment Still in Progress	
Referred to Address		Referral Recap Report	284
Letter Merge Reports	152	Referred Patient	
Referred to Doctor Address		Referred By Patient Report	290
Referred To Doctor Report	292	Referred Patient Name	
		Referred To Doctor Report	292

Referred (continued)

Referred Patients (Average) Practice Analysis Report	242
Referred Patients (for Date Range) Practice Analysis Report	242
Referred Patients (MTD) Practice Analysis Report	242
Referred Patients (YTD) Practice Analysis Report	242

Referred by

First Name of Referred by Source Letter Merge Reports	152
Last Name of Referred by Source Letter Merge Reports	152
Last Referred By Source and Date Patient Route Slip	216
Middle Initial of Referred by Source Letter Merge Reports	152
Number of Referred by Doctor/Other Patients Listed Referred By Doctor/Other Report	288
Referred By (RB) Unscheduled Treatment Plans (Detailed) Report 350	
Referred By Date New Patient List	184
Referred by Doctor/Other Address Referred By Doctor/Other Report	288
Referred by Doctor/Other Gratuity Given Referred By Doctor/Other Report	288
Referred by Doctor/Other Last Gratuity Date Referred By Doctor/Other Report	288
Referred by Doctor/Other Name Referred By Doctor/Other Report Document Center Document	112
Referred by Doctor/Other Phone Number Referred By Doctor/Other Report	288
Referred by Doctor/Other Total Referrals Referred By Doctor/Other Report	288
Referred By Name New Patient List	184
Referred by Patient Name Document Center Document	112
Referred by Source Address Letter Merge Reports	152
Referred by Source Phone Number Letter Merge Reports	152
Referred by Source Salutation Letter Merge Reports	152
Referred by Source Title Letter Merge Reports	152
Total Number of Referred by Doctor/Other Patients Listed Referred By Doctor/Other Report	288
Total Number of Referred by Doctor/Other Referrals Referred By Doctor/Other Report	288

Referred out

Days Referred Out Referred To Doctor Report	292
--	-----

Referred to

Last Referred To Name and Date Patient Route Slip	216
--	-----

Referred To (RT) Unscheduled Treatment Plans (Detailed) Report 350	
Referred to Address Letter Merge Reports	152
Referred to Doctor Address Referred To Doctor Report	292
Referred to Doctor Name Referred To Doctor Report Document Center Document	112
Referred to Doctor Phone Number Referred To Doctor Report	292
Referred to First Name Letter Merge Reports	152
Referred to Last Name Letter Merge Reports	152
Referred to Middle Initial Letter Merge Reports	152
Referred to Phone Number Letter Merge Reports	152
Referred to Salutation Letter Merge Reports	152
Referred to Title Letter Merge Reports	152

Relationship

Patient Relationship to Subscriber for Primary Insurance Patient Questionnaire	214
Patient Relationship to Subscriber for Secondary Insurance Patient Questionnaire	214
Relation to Subscriber Walkout - Doctor's Statement	356

Religion

Patient Religion Patient List (Filtered)	206
Religion UDS - Patient Status Report	338

Remaining

Remaining Number of Months Future Due Payment Plan Report - Standard	128
Remaining Payment Agreement Amount Collections Manager List	70
Total Amount of Charges Remaining (after 18 Mos from Curr Mo) Future Due Payment Plan Report - Monthly Totals	126
Total Amount of Remaining Payment Agreements Collections Manager List	70
Total Amount Remaining Future Due Payment Plan Report - Standard	128
Total Number of Charges Remaining (after 18 Mos from Curr Mo) Future Due Payment Plan Report - Monthly Totals	126

Remaining Balance

Payment Agreement Remaining Balance Payment Agreement Report	224
Payment Agreement Report Payment Agreement Amortization Schedule	222
Payment Plan Remaining Balance Letter Merge Reports	152

Remaining Balance (continued)

Remaining Balance	
Future Due Payment Plan Report - Standard	128
Total Amount of Balances Remaining for Payment Agreements	
Payment Agreement Report	224
Remaining Benefits	
Amount of Estimated Primary Insurance Benefits Remaining YTD for Family	
Treatment Case Report	314
Amount of Estimated Primary Insurance Benefits Remaining YTD for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Estimated Secondary Insurance Benefits Remaining YTD for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Primary Insurance Benefits Remaining	
Unscheduled Treatment Plans (Detailed) Report 350	
Patient Route Slip	216
Amount of Remaining Benefits for Primary Insurance	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Amount of Remaining Benefits for Secondary Insurance	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Amount of Secondary Insurance Benefits Remaining	
Unscheduled Treatment Plans (Detailed) Report 350	
Patient Route Slip	216
Benefits Remaining	
Insurance Carrier List	132
Primary Insurance Benefits Remaining	
Letter Merge Reports	152
Projected Amount of Remaining Benefits	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Projected Amount of Remaining Benefits for Secondary Insurance	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Secondary Insurance Benefits Remaining	
Letter Merge Reports	152
Remarks for Unusual Services	
Remarks for Unusual Service	
Walkout - Doctor's Statement	356
Reminder	
Future Reminder Date	
Collections Manager List	70
Future Reminder Type	
Collections Manager List	70
Number of Patients Sent Reminders	
Meaningful Use Measure Calculation List	156
Reminder Text	
Continuing Care Cards - with Appointment	75
Continuing Care Cards - No Appointment	74
Reminder Type	
Future Reminder Type	
Collections Manager List	70

Rendering Provider

Rendering Provider NPI Number	
Dental Encounters Report	106
Renew	
Benefit Renewal Month	
Insurance Carrier List	132
Primary Insurance Plan Renewal Month	
Unscheduled Treatment Plans (Detailed) Report 350	
Secondary Insurance Benefits Renewal Month	
Patient Route Slip	216
Secondary Insurance Plan Renewal Month	
Unscheduled Treatment Plans (Detailed) Report 350	
Replace	
Replace Initial Zero of Procedure Code on Claims	
Insurance Carrier List	132
Report	
Printed Patient Report	
Audit Report - Combined	32
Representative	
Representative Signature	
Treatment Case Report	314
Request	
Patient Social Security Number or Request Date	
Audit Report - Patients	34
Patient Social Security Number or Request Date Change	
Audit Report - Patients	34
Required	
Pre-authorization Required	
Standard Coverage Tables Report	310
Insurance Coverage Tables Report	144
Retroactive Payment	
Other Retroactive Payment Amount Collected for Patient	
UDS - Patient Related Revenue Report	336
Subtotal of Other Retroactive Payment Amount Collected for Financial Class Type	
UDS - Patient Related Revenue Report	336
Subtotal of Other Retroactive Payment Amount Collected for Payer Category	
UDS - Patient Related Revenue Report	336
Total Other Retroactive Payment Amount Collected for Financial Class Type	
UDS - Patient Related Revenue Report	336
Total Other Retroactive Payment Amount Collected for Patient	
UDS - Patient Related Revenue Report	336
Total Other Retroactive Payment Amount Collected for Payer Category	
UDS - Patient Related Revenue Report	336
Revenue	
Revenue for Provider from Credit Adjustments	
Provider Revenue - Charges Report	276
Provider Revenue - Credits Report	278
Provider Revenue - Summary Report	280
Provider Revenue - Allocations Report	274
Revenue for Provider from Insurance	
Provider Revenue - Charges Report	276
Provider Revenue - Credits Report	278

Revenue (continued)

Provider Revenue - Summary Report	280	Net RVU of Medicaid Procedures for Provider	
Provider Revenue - Allocations Report	274	RVU Production Summary Report	298
Revenue for Provider from Non-insurance Sources		Net RVU of Non-Medicaid Procedures	
Provider Revenue - Charges Report	276	RVU Production Summary Report	298
Provider Revenue - Credits Report	278	Net RVU of Non-Medicaid Procedures for Clinic	
Provider Revenue - Summary Report	280	RVU Production Summary Report	298
Provider Revenue - Allocations Report	274	Net RVU of Non-Medicaid Procedures for Provider	
Total Revenue		RVU Production Summary Report	298
Provider Revenue - Charges Report	276	Net RVU of Procedures	
Provider Revenue - Credits Report	278	RVU Production Summary Report	298
Provider Revenue - Summary Report	280	Net RVU of Procedures for Clinic	
Provider Revenue - Allocations Report	274	RVU Production Summary Report	298
Total Revenue for Provider		Net RVU of Procedures for Provider	
Provider Revenue - Charges Report	276	RVU Production Summary Report	298
Provider Revenue - Credits Report	278	Procedure RVU	
Provider Revenue - Summary Report	280	RVU Utilization Report	304
Provider Revenue - Allocations Report	274	RVU	
Total Revenue from Credit Adjustments		RVU Day Sheet Report	296
Provider Revenue - Charges Report	276	RVU for Clinic	
Provider Revenue - Credits Report	278	RVU Day Sheet Report	296
Provider Revenue - Summary Report	280	RVU for Provider	
Provider Revenue - Allocations Report	274	RVU Day Sheet Report	296
Total Revenue from Insurance		RVU Schedule	
Provider Revenue - Charges Report	276	RVU Schedules Report	302
Provider Revenue - Credits Report	278	Total Amount of Fees - RVU	
Provider Revenue - Summary Report	280	RVU Utilization Report	304
Provider Revenue - Allocations Report	274	Total Amount of RVUs	
Total Revenue from Non-insurance		RVU Utilization Report	304
Provider Revenue - Charges Report	276	Total Net RVU	
Provider Revenue - Credits Report	278	RVU Day Sheet Report	296
Provider Revenue - Summary Report	280	Total RVU	
Provider Revenue - Allocations Report	274	RVU Day Sheet Report	296
Right		RVU Schedule	
Right		Amount of Fees - RVU for Insurance Carrier	
Audit Rights Report - Assigned to Groups	42	RVU Utilization Report	304
Audit Rights Report - Assigned Individually	40	Provider RVU Schedule	
Rights		Provider IDs List	272
Audit Report - Appointments	26	Practice Organization List	244
Audit Report - Clinics	30	RVU Schedule	
Audit Report - Patients	34	RVU Schedules Report	302
Audit Report - Providers/Staff	36	Salutation	
Audit Report - Transactions	38	Patient Salutation	
Assigned Rights Report	24	Continuing Care Cards - with Appointment	75
Running Balance		Letter Merge Reports	152
Patient Running Balance		Continuing Care Cards - No Appointment	74
Patient Ledger Report	202	Referred by Source Salutation	
RVU		Letter Merge Reports	152
Amount of RVUs for Insurance Carrier		Referred to Salutation	
RVU Utilization Report	304	Letter Merge Reports	152
Net RVU		Sampled Chart	
RVU Day Sheet Report	296	Number of Charts Sampled	
Net RVU for Clinic		UDS - Sealant Statistics Report	340
RVU Day Sheet Report	296	Number of Charts Sampled for Provider	
Net RVU for Medicaid Procedures		UDS - Sealant Statistics Report	340
RVU Production Summary Report	298	Number of Charts Sampled in Clinic	
Net RVU for Provider		UDS - Sealant Statistics Report	340
RVU Day Sheet Report	296	Number of Charts Sampled in ZIP Code	
Net RVU of Medicaid Procedures for Clinic		UDS - Sealant Statistics Report	340
RVU Production Summary Report	298	Scheduled	
		Number of Scheduled Treatment-planned Procedures	
		Practice Treatment Case Report	248

Scheduled (continued)

Percent of Scheduled Cases	
Practice Treatment Case Report	248
Scheduled and/or Unscheduled Appointment	
Unscheduled Treatment Plans (Detailed) Report	350
Unscheduled Treatment Plans (Condensed) Report	348
Scheduled Date	
Referred To Doctor Report	292
Total Amount of Scheduled Treatment Plans	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Total Number of Scheduled Appointments	
Appointment Statistics Report	20

Sealant

Number of Patients with Moderate to High Risk of Caries who Got Sealants on Permanent First Molars	
UDS - Sealant Statistics Report	340
Number of Patients with Moderate to High Risk of Caries who Got Sealants on Permanent First Molars for Provider	
UDS - Sealant Statistics Report	340
Number of Patients with Moderate to High Risk of Caries who Got Sealants on Permanent First Molars in Clinic	
UDS - Sealant Statistics Report	340
Number of Patients with Moderate to High Risk of Caries who Got Sealants on Permanent First Molars in ZIP Code	
UDS - Sealant Statistics Report	340
Percent of Patients with Sealants	
Caries Prevalence and Periodontal Index Report	52

Sealed

Mean Number of Sealed Teeth	
Caries Prevalence and Periodontal Index Report	52

Secondary

Amount of Annual Secondary Insurance Plan Benefits for Family	
Treatment Case Report	314
Amount of Annual Secondary Insurance Plan Benefits for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Estimated Secondary Insurance Benefits Remaining YTD for Family	
Treatment Case Report	314
Amount of Estimated Secondary Insurance Benefits Remaining YTD for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Other Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Amount of Other Deductible Owed to Secondary Insurance	
Patient Route Slip	216

Amount of Pending Estimated Secondary Insurance Portions YTD for Family	
Treatment Case Report	314
Amount of Pending Estimated Secondary Insurance Portions YTD for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Preventative Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Amount of Preventative Deductible Owed to Secondary Insurance	
Patient Route Slip	216
Amount of Remaining Benefits for Secondary Insurance	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Amount of Secondary Insurance Benefits Remaining Unscheduled Treatment Plans (Detailed) Report	350
Patient Route Slip	216
Amount of Secondary Insurance Benefits Used	
Patient Route Slip	216
Amount of Secondary Insurance Portion	
Practice Treatment Case Report	248
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Secondary Insurance Portion for Case	
Practice Treatment Case Report	248
Patient Treatment Case Report	218
Amount of Secondary Insurance Portion for Visit	
Practice Treatment Case Report	248
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Secondary Paid Benefits for Family	
Treatment Case Report	314
Amount of Secondary Paid Benefits for Patient	
Treatment Case Report	314
Patient Treatment Case Report	218
Amount of Standard Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Amount of Standard Deductible Owed to Secondary Insurance	
Patient Route Slip	216
Insurance Coverage Percent (Basic) for Secondary Insurance	
Patient Route Slip	216
Insurance Coverage Percent (Major) for Secondary Insurance	
Patient Route Slip	216
Insurance Coverage Percent (Orthodontics) for Secondary Insurance	
Patient Route Slip	216
Insurance Coverage Percent (Preventative) for Secondary Insurance	
Patient Route Slip	216
Insurance Plan Group Number for Secondary Insurance	
Patient Questionnaire	214
Insurance Plan Name and Address for Secondary Insurance	
Patient Questionnaire	214

Secondary (continued)

Last Eligibility Date for Secondary Insurance Coverage		Secondary Insurance Carrier Plan Employer	
Treatment Plan Approval Status Report	318	Patient Route Slip	216
Treatment Plan Approval Report	316	Secondary Insurance Estimated Amount	
Maximum Secondary Insurance Benefit Amount		Treatment Plan Approval Status Report	318
Patient Route Slip	216	Treatment Plan Approval Report	316
Number of Encounters for Secondary Providers		Secondary Insurance Plan Group Number	
UDS - Encounters by Provider Report	328	Treatment Plan Approval Report	316
Number of Patients with Secondary Dental Insurance		Treatment Plan Approval Status Report	318
Practice Statistics Report	246	Patient Route Slip	216
Other Deductible Owed by Family to Secondary Insurance		Secondary Insurance Plan Renewal Month	
Treatment Case Report	314	Unscheduled Treatment Plans (Detailed) Report	350
Other Deductible Owed by Patient to Secondary Insurance		Secondary Medical Insurance Carrier Name	
Treatment Case Report	314	Patient List	204
Patient Treatment Case Report	218	Secondary Pre-treatment Estimate Sent Date	
Outstanding Secondary Insurance Estimated Amount		Treatment Plan Approval Status Report	318
Treatment Plan Approval Status Report	318	Treatment Plan Approval Report	316
Treatment Plan Approval Report	316	Secondary Production Amount	
Patient Relationship to Subscriber for Secondary Insurance		Insurance Carrier Production - Full Report	136
Patient Questionnaire	214	Secondary Production Amount for Insurance Plan	
Percent of Patients with Secondary Dental Insurance		Insurance Carrier Production - Summary Report	138
Practice Statistics Report	246	Insurance Carrier Production - Full Report	136
Preventative Deductible Owed by Family to Secondary Ins		Secondary Provider ID	
Treatment Case Report	314	Patient Route Slip	216
Preventative Deductible Owed by Patient to Secondary Ins		Secondary Subscriber ID	
Treatment Case Report	314	Letter Merge Reports	152
Patient Treatment Case Report	218	Standard Deductible Owed by Family to Secondary Insurance	
Projected Amount of Remaining Benefits for Secondary Insurance		Treatment Case Report	314
Treatment Plan Approval Status Report	318	Standard Deductible Owed by Patient to Secondary Insurance	
Treatment Plan Approval Report	316	Treatment Case Report	314
Secondary Dental Insurance Carrier Name		Patient Treatment Case Report	218
Patient List	204	Subscriber Address for Secondary Insurance	
Secondary Eligibility Date		Patient Questionnaire	214
Appointment Book View Printout	14	Subscriber Birth Date for Secondary Insurance	
Secondary Insurance Benefits Expiration Date for Family		Patient Questionnaire	214
Treatment Case Report	314	Subscriber ID for Secondary Insurance	
Secondary Insurance Benefits Expiration Date for Patient		Patient Questionnaire	214
Treatment Case Report	314	Subscriber Name for Secondary Insurance	
Patient Treatment Case Report	218	Patient Route Slip	216
Secondary Insurance Benefits Remaining		Patient Questionnaire	214
Letter Merge Reports	152	Subscriber's Employer Address for Secondary Insurance	
Secondary Insurance Benefits Renewal Month		Patient Questionnaire	214
Patient Route Slip	216	Subscriber's Employer Name for Secondary Insurance	
Secondary Insurance Carrier Name		Patient Questionnaire	214
Patient Route Slip	216	Total Amount for Secondary Pre-treatment Estimates	
Secondary Insurance Claims Not Created Report	306	Pre-Treatment Estimate Aging Report	252
Secondary Pre-Treatment Estimates Not Created Report	308	Total Amount of Account Balances Aged 1 - 30 for Secondary Pre-treatment Estimates	
Treatment Plan Approval Report	316	Pre-Treatment Estimate Aging Report	252
Treatment Plan Approval Status Report	318	Total Amount of Account Balances Aged 1 - 30 with Secondary Claims	
Unscheduled Treatment Plans (Detailed) Report	350	Insurance Claim Aging Report	140
Letter Merge Reports	152	Total Amount of Account Balances Aged 121 - 150 for Secondary Pre-treatment Estimates	
		Pre-Treatment Estimate Aging Report	252
		Total Amount of Account Balances Aged 121 - 150 with Secondary Claims	
		Insurance Claim Aging Report	140

Secondary (continued)

Total Amount of Account Balances Aged 151 - 180 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 151 - 180 with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 181+ for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 181+ with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 31 - 60 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 31 - 60 with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 61 - 90 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 61 - 90 with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances Aged 91 - 120 for Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Account Balances Aged 91 - 120 with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances with Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Account Balances with Secondary Pre-treatment Estimates	
Pre-Treatment Estimate Aging Report	252
Total Amount of Estimated Insurance Portion for Primary and Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Estimated Insurance Portion for Secondary Claims	
Insurance Claim Aging Report	140
Total Amount of Primary and Secondary Claims not Sent	
Insurance Claims Not Sent Report	142
Total Amount of Secondary Claims not Created	
Secondary Insurance Claims Not Created Report	306
Total Amount of Secondary Claims not Sent	
Insurance Claims Not Sent Report	142
Total Amount of Secondary Insurance Portion for Case	
Treatment Case Report	314
Total Amount of Secondary Pre-treatment Estimates not Created	
Secondary Pre-Treatment Estimates Not Created Report	308
Total Amount of Secondary Pre-treatment Estimates not Sent	
Pre-Treatment Estimates Not Sent Report	254

Total Amount of Secondary Production	
Insurance Carrier Production - Summary Report	138
Insurance Carrier Production - Full Report	136

Secure Electronic Message

Number of Patients who Sent Secure Electronic Messages	
Meaningful Use Measure Calculation List	156
Number of Patients Who Were Sent Secure Electronic Messages	
Meaningful Use Measure Calculation List	156

Seen

Current Number of Patients Seen	
Day Sheet (Charges and Receipts) Report	94
Current Number of Patients Seen by Provider	
Day Sheet (Charges and Receipts) Report	94
Number of Patients 0 - 2 Years Seen	
Meaningful Use Measure Calculation List	156
Number of Patients 13+ Years Seen	
Meaningful Use Measure Calculation List	156
Meaningful Use Measure Calculation List	156
Number of Patients 2+ Years Seen	
Meaningful Use Measure Calculation List	156
Number of Patients 3+ Years Seen	
Meaningful Use Measure Calculation List	156
Number of Patients 66+ Years Seen	
Clinical Quality Measures List	66
Number of Patients Seen	
Analysis Summary Report - Standard	12
Daily Summary Report	88
Meaningful Use Measure Calculation List	156
Analysis Summary Report - Daily	8
Number of Patients Seen at Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Number of Patients Seen by Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Number of Patients Seen During Past 24 Months	
Meaningful Use Measure Calculation List	156
Number of Patients Seen for Insurance Carrier	
Utilization Report	354
RVU Utilization Report	304
Number of Patients Seen MTD	
Day Sheet (Charges and Receipts) Report	94
Number of Patients Seen MTD by Provider	
Day Sheet (Charges and Receipts) Report	94
Total Number of Patients Seen	
Analysis Summary Report - Standard	12
Day Sheet Report	100
RVU Utilization Report	304
Utilization Report	354
Analysis Summary Report - Daily	8

Sent

Claim Sent Date	
Insurance Transaction Analysis Report	148
Insurance Claim Aging Report	140
Pre-treatment Estimate Sent Date	
Pre-Treatment Estimate Aging Report	252

Sent (continued)

Primary Pre-treatment Estimate Sent Date		Representative Signature	
Treatment Plan Approval Status Report	318	Treatment Case Report	314
Treatment Plan Approval Report	316	Signature Date	
Secondary Pre-treatment Estimate Sent Date		Treatment Case Report	314
Treatment Plan Approval Status Report	318	Staff Signature	
Treatment Plan Approval Report	316	Treatment Case Report	314
Separated		Signed	
Number of Separated Patients		Clinical Note Status	
Practice Statistics Report	246	Clinical Notes Report	64
Percent of Separated Patients		Date Signed	
Practice Statistics Report	246	Perio - Exam Comparison Report	232
Serial Number		Perio - Graphic Chart Report	234
DENTRIX Enterprise Serial Number		Perio - Combined Graphic & Data Chart Report	228
Registration Information Report	294	Signer	
Service		Signer Name	
Description of Service		Treatment Case Report	314
Billing Statement	48	Single	
Procedure Date for Date of Service		Number of Single Patients	
Letter Merge Reports	152	Practice Statistics Report	246
Service Date		Percent of Single Patients	
Insurance Claim Aging Report	140	Practice Statistics Report	246
RVU Utilization Report	304	Smoking Status	
Treatment Plan Approval Report	316	Number of Patients 13+ Years with Smoking Status	
Treatment Plan Approval Status Report	318	Meaningful Use Measure Calculation List	156
Utilization Report	354	Meaningful Use Measure Calculation List	156
Dental Encounters Report	106	Social Security Number	
Total Charge for Date of Service		Guarantor Social Security Number	
Letter Merge Reports	152	Patient Route Slip	216
Type of Service Code		Truth in Lending Disclosure Statement	320
Medical Code List	180	Collections Manager List	70
Type of Service Code Description		Patient Social Security Number	
Medical Code List	180	Coupon Book - Future Due Payments	78
Setting		Coupon Book - Payment Agreements	79
Status of Setting		Employers and Employed Patients Report	116
Audit Report - Audit Log Status	28	Insurance Transaction Analysis Report	148
Severity		Letter Merge Reports	152
Case Severity		Patient Chart and Progress Notes Printout	194
Practice Treatment Case Report	248	Patient Chart Printout	196
Sexual Orientation		Patient List	204
Sexual Orientation		Patient Notes Report	208
UDS - Patient Status Report	338	Patient Proposed Treatment Case Report (Your Care Plan)	212
Signature		Patient Questionnaire	214
Date Signed		Patient Route Slip	216
Perio - Exam Comparison Report	232	Patient Treatment Case Report	218
Perio - Graphic Chart Report	234	Perio - Combined Graphic & Data Chart Report	228
Perio - Combined Graphic & Data Chart Report	228	Perio - Exam Comparison Report	232
Patient Signature		Perio - Graphic Chart Report	234
Treatment Case Report	314	Practice Treatment Case Report	248
Practice Signature		RVU Utilization Report	304
Treatment Case Report	314	Treatment Case Report	314
Provider Signature		UDS - Age/Gender Report	322
Treatment Case Report	314	UDS - Insurance Financial Class Report	330
Prescription Printout	250	UDS - Insurance Financial Class Report (2013)	332
Provider's Signature		UDS - Medicaid/Medicare Report	334
Perio - Exam Comparison Report	232	UDS - Patient Status Report	338
Perio - Graphic Chart Report	234	UDS - Sealant Statistics Report	340
Perio - Combined Graphic & Data Chart Report	228	UDS - Tobacco Use and Intervention Report	342
		Utilization Report	354
		Walkout - Doctor's Statement	356

Social Security Number (continued)

Clinical Notes Report	64	Debit Special Adjustment Amount	
Patient Social Security Number or Request Date		Analysis Summary Report - Standard	12
Audit Report - Patients	34	Analysis Summary Report - Daily	8
Patient Social Security Number or Request Date Change		Other Credit Special Adjustment Amount	
Audit Report - Patients	34	Analysis Summary Report - Standard	12
Provider Social Security Number		Analysis Summary Report - Daily	8
Practice Organization List	244	Total Amount of Credit Special Adjustments	
Provider IDs List	272	Analysis Summary Report - Standard	12
Audit Report - Providers/Staff	36	Day Sheet Report	100
Provider Social Security Number Change		Provider A/R Totals - Daily Report	264
Audit Report - Providers/Staff	36	Provider A/R Totals - Standard Report	266
Provider Social Security Number or TIN Number		Analysis Summary Report - Daily	8
Walkout - Doctor's Statement	356	Total Amount of Debit Special Adjustments	
Spouse Social Security Number		Analysis Summary Report - Standard	12
Patient Questionnaire	214	Day Sheet Report	100
Staff Social Security Number		Provider A/R Totals - Daily Report	264
Audit Report - Providers/Staff	36	Provider A/R Totals - Standard Report	266
Staff Social Security Number Change		Analysis Summary Report - Daily	8
Audit Report - Providers/Staff	36	Total Amount of Other Applied Credit Special Adjustments	
		Day Sheet Report	100
		Total Amount of Other Credit Special Adjustments	
		Analysis Summary Report - Standard	12
		Analysis Summary Report - Daily	8
Special Adjustment		Specialty	
Amount of Credit Special Adjustments		Specialty	
Provider A/R Totals - Daily Report	264	Practice Organization List	244
Amount of Credit Special Adjustments for Clinic		Spouse	
Analysis Summary Report - Standard	12	Best Time to Call Spouse	
Day Sheet Report	100	Patient Questionnaire	214
Analysis Summary Report - Daily	8	Spouse Address	
Amount of Credit Special Adjustments for Provider		Patient Questionnaire	214
Analysis Summary Report - Standard	12	Spouse Birth Date	
Day Sheet Report	100	Patient Questionnaire	214
Provider A/R Totals - Daily Report	264	Spouse Drivers License Number	
Provider A/R Totals - Standard Report	266	Patient Questionnaire	214
Analysis Summary Report - Daily	8	Spouse Email Address	
Amount of Debit Special Adjustments		Patient Questionnaire	214
Provider A/R Totals - Daily Report	264	Spouse Fax Number	
Amount of Debit Special Adjustments for Clinic		Patient Questionnaire	214
Analysis Summary Report - Standard	12	Spouse Gender	
Day Sheet Report	100	Patient Questionnaire	214
Analysis Summary Report - Daily	8	Spouse Home Phone Number	
Amount of Debit Special Adjustments for Provider		Patient Questionnaire	214
Analysis Summary Report - Standard	12	Spouse Mobile Number	
Day Sheet Report	100	Patient Questionnaire	214
Provider A/R Totals - Daily Report	264	Spouse Name	
Provider A/R Totals - Standard Report	266	Patient Questionnaire	214
Analysis Summary Report - Daily	8	Spouse Other Number	
Amount of Other Applied Credit Special Adjustments for Clinic		Patient Questionnaire	214
Day Sheet Report	100	Spouse Social Security Number	
Amount of Other Credit Special Adjustments for Clinic		Patient Questionnaire	214
Analysis Summary Report - Standard	12	Spouse Work Phone Extension	
Analysis Summary Report - Daily	8	Patient Questionnaire	214
Amount of Other Credit Special Adjustments for Provider		Spouse Work Phone Number	
Analysis Summary Report - Standard	12	Patient Questionnaire	214
Analysis Summary Report - Daily	8	Staff	
Credit Special Adjustment Amount		Staff ID	
Analysis Summary Report - Standard	12	Audit Report - Providers/Staff	36
Analysis Summary Report - Daily	8	Appointment Book View Printout	14
		Staff ID Change	
		Audit Report - Providers/Staff	36

Staff (continued)

Staff Name	
Audit Report - Providers/Staff	36
Staff Name Change	
Audit Report - Providers/Staff	36
Staff Signature	
Treatment Case Report	314
Staff Social Security Number	
Audit Report - Providers/Staff	36
Staff Social Security Number Change	
Audit Report - Providers/Staff	36

Standard

Amount of Standard Deductible Owed by Family to Primary Insurance	
Patient Route Slip	216
Amount of Standard Deductible Owed by Family to Secondary Insurance	
Patient Route Slip	216
Amount of Standard Deductible Owed to Primary Insurance	
Patient Route Slip	216
Amount of Standard Deductible Owed to Secondary Insurance	
Patient Route Slip	216
Lifetime/Individual/Standard Deductible	
Insurance Carrier List	132
Lifetime/Individual/Standard Other Deductible	
Insurance Carrier List	132
Lifetime/Individual/Standard Preventative Deductible	
Insurance Carrier List	132
Standard Deductible Met	
Insurance Carrier List	132
Standard Deductible Owed by Family to Primary Insurance	
Treatment Case Report	314
Standard Deductible Owed by Family to Secondary Insurance	
Treatment Case Report	314
Standard Deductible Owed by Patient to Primary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218
Standard Deductible Owed by Patient to Secondary Insurance	
Treatment Case Report	314
Patient Treatment Case Report	218

State

Guarantor State	
Collections Manager List	70
Insurance Carrier City and State	
Insurance Eligibility Report	146
Patient State	
Patient List (Filtered)	206
Letter Merge Reports	152
Practice City State and ZIP Code	
Letter Merge Reports	152
Practice State	
Registration Information Report	294

State ID

Provider State ID	
Provider IDs List	272

State ID	
Practice Organization List	244

Statement

Last Statement Date	
Collections Manager List	70
Patient Route Slip	216
Aging/Credit Balance Report	6
Statement Note	
Patient Notes Report	208

Status

Appointment Status	
As Soon As Possible List	22
Audit Report - Appointments	26
Daily Appointment List (DX1)	84
Daily Appointment List Report	86
Operatory Appointment List Report	190
Patient Chart and Progress Notes Printout	194
Unscheduled Appointment List (DX1)	344
Unscheduled Appointment List (OM)	346
Appointment Cycle Time Report	16
Appointment Status Change	
Audit Report - Appointments	26
Appointment Statuses	
Custom Practice Information Report	82
Claim On Hold Date	
Insurance Claim Aging Report	140
Claim Re-sent Date	
Insurance Claim Aging Report	140
Claim Sent Date	
Insurance Transaction Analysis Report	148
Insurance Claim Aging Report	140
Claim Tracer Date	
Insurance Claim Aging Report	140
Continuing Care Status	
Continuing Care Display List	76
Length in Appointment Status	
Appointment Cycle Time Report	16
Number of Patients with Status	
UDS - Patient Status Report	338
Number of Patients with Status for Clinic	
UDS - Patient Status Report	338
Number of Patients with Status for Provider	
UDS - Patient Status Report	338
Patient Homeless Status	
Patient List (Filtered)	206
Patient Marital Status	
Insurance Carrier List	132
Letter Merge Reports	152
Patient List	204
Patient Route Slip	216
Employers and Employed Patients Report	116
Patient Status	
Letter Merge Reports	152
New Patient List	184
Patient List	204
Audit Report - Patients	34
Patient Status Change	
Audit Report - Patients	34
Patient Veteran Status	
Patient List (Filtered)	206
Patient Worker Status	
Patient List (Filtered)	206

Status (continued)

Payment Status		Number of Subscribers	
Credit Card Transaction Report	80	Insurance Carrier List	132
Pre-treatment Estimate On Hold Date		Patient Relationship to Subscriber for Primary Insurance	
Pre-Treatment Estimate Aging Report	252	Patient Questionnaire	214
Pre-treatment Estimate Re-sent Date		Patient Relationship to Subscriber for Secondary Insurance	
Pre-Treatment Estimate Aging Report	252	Patient Questionnaire	214
Pre-treatment Estimate Sent Date		Primary Insurance Subscriber ID	
Pre-Treatment Estimate Aging Report	252	Letter Merge Reports	152
Pre-treatment Estimate Tracer Date		Relation to Subscriber	
Pre-Treatment Estimate Aging Report	252	Walkout - Doctor's Statement	356
Primary Pre-treatment Estimate Sent Date		Secondary Subscriber ID	
Treatment Plan Approval Status Report	318	Letter Merge Reports	152
Treatment Plan Approval Report	316	Subscriber Address for Primary Insurance	
Referral Status		Patient Questionnaire	214
Referred To Doctor Report	292	Subscriber Address for Secondary Insurance	
Secondary Pre-treatment Estimate Sent Date		Patient Questionnaire	214
Treatment Plan Approval Status Report	318	Subscriber Birth Date	
Treatment Plan Approval Report	316	Walkout - Doctor's Statement	356
Status of Access		Insurance Carrier List	132
Patient Information Accessed Report	200	Subscriber Birth Date for Primary Insurance	
Status of Setting		Patient Questionnaire	214
Audit Report - Audit Log Status	28	Subscriber Birth Date for Secondary Insurance	
Subscriber Marital Status		Patient Questionnaire	214
Insurance Carrier List	132	Subscriber Chart Number	
Total Amount of Pre-treatment Estimates not Sent		Insurance Carrier List	132
Pre-Treatment Estimates Not Sent Report	254	Subscriber Employer Name	
Total Amount of Primary and Secondary Claims not Sent		Insurance Carrier List	132
Insurance Claims Not Sent Report	142	Subscriber ID	
Total Amount of Primary Claims not Sent		Insurance Carrier List	132
Insurance Claims Not Sent Report	142	Insurance Claim Aging Report	140
Total Amount of Primary Pre-treatment Estimates not Sent		Insurance Eligibility Report	146
Pre-Treatment Estimates Not Sent Report	254	Insurance Transaction Analysis Report	148
Total Amount of Secondary Claims not Created		Pre-Treatment Estimate Aging Report	252
Secondary Insurance Claims Not Created Report	306	RVU Utilization Report	304
Total Amount of Secondary Claims not Sent		Utilization Report	354
Insurance Claims Not Sent Report	142	Walkout - Doctor's Statement	356
Total Amount of Secondary Pre-treatment Estimates not Created		Dental Encounters Report	106
Secondary Pre-Treatment Estimates Not Created Report	308	Subscriber ID for Primary Insurance	
Total Amount of Secondary Pre-treatment Estimates not Sent		Patient Questionnaire	214
Pre-Treatment Estimates Not Sent Report	254	Subscriber ID for Secondary Insurance	
Total Length in Appointment Statuses		Patient Questionnaire	214
Appointment Cycle Time Report	16	Subscriber Marital Status	
Total Number of Patients (any Status)		Insurance Carrier List	132
Practice Statistics Report	246	Subscriber Name	
Total Number of Patients with Statuses		Insurance Claim Aging Report	140
UDS - Patient Status Report	338	Insurance Eligibility Report	146
Treatment Plan Approval Status		Pre-Treatment Estimate Aging Report	252
Treatment Plan Approval Report	316	RVU Utilization Report	304
Treatment Plan Approval Status Report	318	Utilization Report	354
Patient Chart and Progress Notes Printout	194	Walkout - Doctor's Statement	356
Treatment Plan Status		Dental Encounters Report	106
Patient Route Slip	216	Subscriber ID for Primary Insurance	
Subscriber		Patient Questionnaire	214
Beneficiary ID		Subscriber ID for Secondary Insurance	
Dental Encounters Report	106	Patient Questionnaire	214
		Subscriber Marital Status	
		Insurance Carrier List	132
		Subscriber Name	
		Insurance Claim Aging Report	140
		Insurance Eligibility Report	146
		Pre-Treatment Estimate Aging Report	252
		RVU Utilization Report	304
		Utilization Report	354
		Insurance Carrier List	132
		Subscriber Name for Primary Insurance	
		Patient Route Slip	216
		Patient Questionnaire	214
		Subscriber Name for Secondary Insurance	
		Patient Route Slip	216
		Patient Questionnaire	214
		Subscriber's Employer Address for Primary Insurance	
		Patient Questionnaire	214
		Subscriber's Employer Address for Secondary Insurance	
		Patient Questionnaire	214

Subscriber (continued)

Subscriber's Employer Name for Primary Insurance Patient Questionnaire	214
Subscriber's Employer Name for Secondary Insurance Patient Questionnaire	214

Substitution

Generic Substitution Permitted Prescription Printout	250
---	-----

Summary of Care

Number of Incorporated Electronic Summary of Care Documents Meaningful Use Measure Calculation List	156
Number of TCs (Transition of Care) and Referrals where SCs (Summary of Care) Provided Meaningful Use Measure Calculation List	156
Number of TCs (Transition of Care) and Referrals where SCs (Summary of Care) Was Exchanged Electronically Meaningful Use Measure Calculation List	156

Suppuration

Suppuration Perio - Data Chart Report	230
Perio - Combined Graphic & Data Chart Report	228

Surface

Tooth Surface Patient Treatment Case Report	218
Perio - Combined Graphic & Data Chart Report	228
Perio - Data Chart Report	230
Perio - Exam Comparison Report	232
Perio - Pocket Depths Only Report	236
Practice Treatment Case Report	248
RVU Utilization Report	304
Treatment Case Report	314
Treatment Plan Approval Report	316
Treatment Plan Approval Status Report	318
Utilization Report	354
Walkout - Doctor's Statement	356
Walkout - Family Walkout	358
Patient Chart and Progress Notes Printout	194
Tooth Surface of Completed Treatment Referral Recap Report	284
Tooth Surface of Treatment Still in Progress Referral Recap Report	284
Tooth Surface of Treatment-planned Procedure Referral Slip	286

Suspended

Account Suspended Credit Amount Patient Route Slip	216
Amount of Current Suspended Credit Adjustments for Provider Day Sheet (Charges and Receipts) Report	94
Amount of Current Suspended Payments for Provider Day Sheet (Charges and Receipts) Report	94
Amount of MTD Suspended Credit Adjustments for Provider Day Sheet (Charges and Receipts) Report	94
Amount of MTD Suspended Payments for Provider Day Sheet (Charges and Receipts) Report	94

Amount of Suspended Credit Adjustments for Clinic Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Suspended Credit Adjustments for Previous Month for Provider Day Sheet (Charges and Receipts) Report	94
Amount of Suspended Credit Adjustments for Provider Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Suspended Credits Aging/Credit Balance Report	6
Amount of Suspended Credits for Guarantor Suspended Credits Report	312
Amount of Suspended Insurance Payments for Clinic Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Suspended Insurance Payments for Provider Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Suspended Payments for Clinic Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Suspended Payments for Previous Month for Provider Day Sheet (Charges and Receipts) Report	94
Amount of Suspended Payments for Provider Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of YTD Suspended Credit Adjustments for Prov Day Sheet (Charges and Receipts) Report	94
Amount of YTD Suspended Payments for Provider Day Sheet (Charges and Receipts) Report	94
Patient Suspended Credit Amount Patient Route Slip	216
Suspended Amount Suspended Credits Report	312
Suspended Amount on Ledger Suspended Credits Report	312
Suspended Credit Adjustment Amount Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Suspended Credit Amount Continuing Care Display List	76
Suspended Credit Amount for Clinic Aging/Credit Balance Report	6
Suspended Credits Practice Analysis Report	242
Suspended Insurance Payment Amount Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Suspended Payment Amount Analysis Summary Report - Daily	8
Total Amount of Current Suspended Credit Adjustments Day Sheet (Charges and Receipts) Report	94

Suspended (continued)

Total Amount of Current Suspended Payments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of MTD Suspended Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of MTD Suspended Payments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Suspended Credit Adjustments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Suspended Credit Adjustments for Previous Month	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Suspended Credits for Clinic	
Suspended Credits Report	312
Total Amount of Suspended Insurance Payments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Suspended Payments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Suspended Payments for Previous Month	
Day Sheet (Charges and Receipts) Report	94
Total Amount of YTD Suspended Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of YTD Suspended Payments	
Day Sheet (Charges and Receipts) Report	94
Total Suspended Credits	
Aging/Credit Balance Report	6

Suspended Adjustment

Amount of Current Suspended Credit Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of MTD Suspended Credit Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94

Suspended Amount

Suspended Amount	
Suspended Credits Report	312
Suspended Amount on Ledger	
Suspended Credits Report	312

Suspended Credit

Account Suspended Credit Amount	
Patient Route Slip	216
Amount of Suspended Credits	
Aging/Credit Balance Report	6
Amount of Suspended Credits for Guarantor	
Suspended Credits Report	312
Patient Suspended Credit Amount	
Patient Route Slip	216
Percent of Suspended Credits	
Aging/Credit Balance Report	6
Suspended Credit Amount	
Continuing Care Display List	76
Suspended Credit Amount for Clinic	
Aging/Credit Balance Report	6

Suspended Credits	
Practice Analysis Report	242
Total Amount of Suspended Credits for Clinic	
Suspended Credits Report	312
Total Suspended Credits	
Aging/Credit Balance Report	6

Suspended Credit Adjustment

Amount of Current Suspended Credit Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of MTD Suspended Credit Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Suspended Credit Adjustments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of Suspended Credit Adjustments for Previous Month for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Suspended Credit Adjustments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Amount of YTD Suspended Credit Adjustments for Provider	
Day Sheet (Charges and Receipts) Report	94
Suspended Credit Adjustment Amount	
Analysis Summary Report - Standard	12
Analysis Summary Report - Daily	8
Total Amount of Current Suspended Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of MTD Suspended Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94
Total Amount of Suspended Credit Adjustments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Suspended Credit Adjustments for Previous Month	
Day Sheet (Charges and Receipts) Report	94
Total Amount of YTD Suspended Credit Adjustments	
Day Sheet (Charges and Receipts) Report	94

Suspended Insurance Payment

Amount of Suspended Insurance Payments for Provider	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8
Total Amount of Suspended Insurance Payments	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8

Suspended Payment

Amount of Current Suspended Payments for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of MTD Suspended Payments for Provider	
Day Sheet (Charges and Receipts) Report	94
Amount of Suspended Insurance Payments for Clinic	
Analysis Summary Report - Standard	12
Day Sheet Report	100
Analysis Summary Report - Daily	8

Suspended Payment (continued)

Amount of Suspended Payments for Clinic		Operatory Appointment List Report	190
Analysis Summary Report - Standard	12	Patient List (Filtered)	206
Day Sheet Report	100	Walkout - Family Walkout	358
Analysis Summary Report - Daily	8	Appointment Reminder Cards	18
Amount of Suspended Payments for Previous Month for Provider		Appointment Time Change	
Day Sheet (Charges and Receipts) Report	94	Audit Report - Appointments	26
Amount of Suspended Payments for Provider		Average Length of Time Between Appointment Statuses	
Analysis Summary Report - Standard	12	Appointment Statistics Report	20
Day Sheet Report	100	Average Wait Time	
Analysis Summary Report - Daily	8	Appointment Cycle Time Report	16
Amount of YTD Suspended Payments for Provider		Best Time to Call	
Day Sheet (Charges and Receipts) Report	94	Collections Manager List	70
Suspended Insurance Payment Amount		Best Time to Call Patient	
Analysis Summary Report - Standard	12	Patient Questionnaire	214
Analysis Summary Report - Daily	8	Best Time to Call Spouse	
Suspended Payment		Patient Questionnaire	214
Analysis Summary Report - Standard	12	Clinical Note Time	
Suspended Payment Amount		Clinical Notes Report	64
Analysis Summary Report - Daily	8	Future Appointment Time	
Total Amount of Current Suspended Payments		Patient Route Slip	216
Day Sheet (Charges and Receipts) Report	94	Immunization Time	
Total Amount of MTD Suspended Payments		Patient List (Filtered)	206
Day Sheet (Charges and Receipts) Report	94	Median Wait Time	
Total Amount of Suspended Payments		Appointment Cycle Time Report	16
Analysis Summary Report - Standard	12	Next Appointment Time	
Day Sheet Report	100	Patient Route Slip	216
Analysis Summary Report - Daily	8	Next Continuing Care Appointment Time	
Total Amount of Suspended Payments for Previous Month		Letter Merge Reports	152
Day Sheet (Charges and Receipts) Report	94	Number of Appointments in Appointment Status for or Longer than Length of Time	
Total Amount of YTD Suspended Payments		Appointment Statistics Report	20
Day Sheet (Charges and Receipts) Report	94	Number of Appointments in Appointment Status Less than Length of Time	
		Appointment Statistics Report	20
Tax		Office Journal Entry Time	
Tax Identification Number		Office Journal Report	186
Practice Organization List	244	Percent of Appointments in Appointment Status for or Longer than Length of Time	
Tax Identification Number		Appointment Statistics Report	20
Clinic TIN Number		Time	
Provider IDs List	272	Appointment Book View Printout	14
Provider Social Security Number or TIN Number		Time Limit	
Walkout - Doctor's Statement	356	Insurance Carrier List	132
Provider TIN Number		Time of Access	
Provider IDs List	272	Patient Information Accessed Report	200
Tax Identification Number		Time of Change	
Practice Organization List	244	Audit Report - Appointments	26
Temporary		Audit Report - Audit Log Status	28
Permanent/Temporary		Audit Report - Clinics	30
Multi-Code List	182	Audit Report - Combined	32
Terminal		Audit Report - Patients	34
Terminal Name		Audit Report - Providers/Staff	36
Credit Card Transaction Report	80	Audit Report - Transactions	38
Time		Audit Rights Report - Assigned Individually	40
Appointment Date and Time		Audit Rights Report - Assigned to Groups	42
Insurance Eligibility Report	146	Audit Rights Report - Group Names	44
Appointment Time		Audit Rights Report - Users to Groups	46
As Soon As Possible List	22	Appointment Cycle Time Report	16
Audit Report - Appointments	26	Time Units	
Daily Appointment List (DX1)	84	Procedure Code List	256
Daily Appointment List Report	86	Multi-Code List	182
Letter Merge Reports	152		

Time (continued)

Wait Time	
Appointment Cycle Time Report	16
Time Block	
Time Blocks	
Appointment Book View Printout	14
TIN	
Clinic TIN Number	
Provider IDs List	272
Provider Social Security Number or TIN Number	
Walkout - Doctor's Statement	356
Provider TIN Number	
Provider IDs List	272
Tax Identification Number	
Practice Organization List	244
Title	
Patient Title	
Letter Merge Reports	152
Practice Title	
Registration Information Report	294
Audit Report - Clinics	30
Practice Title Change	
Audit Report - Clinics	30
Provider Title	
Practice Organization List	244
Provider IDs List	272
Letter Merge Reports	152
Referred by Source Title	
Letter Merge Reports	152
Referred to Title	
Letter Merge Reports	152
Tobacco	
Number of Patients 18+ Years who Use Tobacco and Received Cessation Counseling	
Clinical Quality Measures List	66
Percent of Patients with Using Tobacco	
Caries Prevalence and Periodontal Index Report	52
Tobacco Cessation Counseling	
Number of Tobacco Users 18+ Years with Tobacco Use Assessment and Tobacco Cessation Counseling or Tobacco Cessation Pharmacotherapy	
UDS - Tobacco Use and Intervention Report	342
Tobacco Cessation Pharmacotherapy	
Number of Tobacco Users 18+ Years with Tobacco Use Assessment and Tobacco Cessation Counseling or Tobacco Cessation Pharmacotherapy	
UDS - Tobacco Use and Intervention Report	342
Tobacco Non-user	
Number of Tobacco Non-users 18+ Years with Tobacco Use Assessment	
UDS - Tobacco Use and Intervention Report	342
Tobacco Use Assessment	
Number of Tobacco Non-users 18+ Years with Tobacco Use Assessment	
UDS - Tobacco Use and Intervention Report	342
Number of Tobacco Users 18+ Years with Tobacco Use Assessment and Tobacco Cessation Counseling or Tobacco Cessation Pharmacotherapy	
UDS - Tobacco Use and Intervention Report	342

Tobacco User

Number of Tobacco Users 18+ Years with Tobacco Use Assessment and Tobacco Cessation Counseling or Tobacco Cessation Pharmacotherapy	
UDS - Tobacco Use and Intervention Report	342

Tooth

Mandibular Tooth Number	
Perio - Data Chart Report	230
Perio - Pocket Depths Only Report	236
Perio - Combined Graphic & Data Chart Report	228
Maxillary Tooth Number	
Perio - Data Chart Report	230
Perio - Exam Comparison Report	232
Perio - Pocket Depths Only Report	236
Perio - Combined Graphic & Data Chart Report	228
Mean Number of Sealed Teeth	
Caries Prevalence and Periodontal Index Report	52
Number of Patients 0 - 19 Years with Tooth Decay or Cavities	
Clinical Quality Measures List	66
Tooth Code	
Perio - Data Chart Report	230
Perio - Pocket Depths Only Report	236
Perio - Combined Graphic & Data Chart Report	228
Tooth Number	
Insurance Transaction Analysis Report	148
Operator Day Sheet Report	188
Patient Chart and Progress Notes Printout	194
Patient Ledger Report	202
Patient Treatment Case Report	218
Practice Treatment Case Report	248
Procedures Not Attached to Insurance Report	258
RVU Day Sheet Report	296
RVU Utilization Report	304
Treatment Case Report	314
Treatment Plan Approval Report	316
Treatment Plan Approval Status Report	318
Unscheduled Treatment Plans (Detailed) Report	350
Utilization Report	354
Walkout - Doctor's Statement	356
Walkout - Family Walkout	358
Day Sheet (Charges and Receipts) Report	94
Tooth Number for Today's Completed Work	
Patient Chart Printout	196
Tooth Number for Treatment-planned Procedure	
Patient Chart Printout	196
Tooth Number of Completed Treatment	
Referral Recap Report	284
Tooth Number of Treatment Still in Progress	
Referral Recap Report	284
Tooth Number of Treatment-Planned Procedure	
Referral Slip	286
Tooth Surface	
Patient Treatment Case Report	218
Perio - Combined Graphic & Data Chart Report	228
Perio - Data Chart Report	230

Tooth (continued)

Perio - Exam Comparison Report	232
Perio - Pocket Depths Only Report	236
Practice Treatment Case Report	248
RVU Utilization Report	304
Treatment Case Report	314
Treatment Plan Approval Report	316
Treatment Plan Approval Status Report	318
Utilization Report	354
Walkout - Doctor's Statement	356
Walkout - Family Walkout	358
Patient Chart and Progress Notes Printout	194
Tooth Surface of Completed Treatment	
Referral Recap Report	284
Tooth Surface of Treatment Still in Progress	
Referral Recap Report	284
Tooth Surface of Treatment-planned Procedure	
Referral Slip	286
Tracer	
Claim Tracer Date	
Insurance Claim Aging Report	140
Pre-treatment Estimate Tracer Date	
Pre-Treatment Estimate Aging Report	252
Transaction	
ADA Code Description or Transaction Description	
Operator Day Sheet Report	188
Deleted Transaction	
Audit Report - Transactions	38
Inserted Transaction	
Audit Report - Transactions	38
Total Amount of Transactions	
Credit Card Transaction Report	80
Total Number of Transactions	
Credit Card Transaction Report	80
Transaction Amount	
Credit Card Transaction Report	80
Provider Revenue - Allocations Report	274
Provider Revenue - Charges Report	276
Provider Revenue - Credits Report	278
Suspended Credits Report	312
Audit Report - Transactions	38
Transaction Amount Change	
Audit Report - Transactions	38
Transaction Date	
Family Ledger Report	118
Family Ledger Report (Single Family)	120
Insurance Transaction Analysis Report	148
Patient's Ledger Report	220
Credit Card Transaction Report	80
Transaction Description	
Family Ledger Report	118
Family Ledger Report (Single Family)	120
Insurance Transaction Analysis Report	148
Patient's Ledger Report	220
Provider Revenue - Allocations Report	274
Provider Revenue - Charges Report	276
Provider Revenue - Credits Report	278
Suspended Credits Report	312
Audit Report - Transactions	38
Transaction Description Change	
Audit Report - Transactions	38

Transaction ID	
Credit Card Transaction Report	80
Transaction Type/Code	
Insurance Transaction Analysis Report	148
Transaction Status	
Payment Status	
Credit Card Transaction Report	80
Transition of Care	
Number of TCs (Transition of Care)	
Meaningful Use Measure Calculation List	156
Number of TCs (Transition of Care) and Referrals	
Meaningful Use Measure Calculation List	156
Number of TCs (Transition of Care) and Referrals where	
Clinical Information Reconciliation Was Performed	
Meaningful Use Measure Calculation List	156
Number of TCs (Transition of Care) and Referrals where	
Electronic SCs (Summary of Care) Provided	
Meaningful Use Measure Calculation List	156
Number of TCs (Transition of Care) and Referrals where	
SCs (Summary of Care) Provided	
Meaningful Use Measure Calculation List	156
Number of TCs (Transition of Care) and Referrals where	
SCs (Summary of Care) Was Exchanged Electronically	
Meaningful Use Measure Calculation List	156
Number of TCs (Transition of Care) where Medication	
Reconciliation Was Performed	
Meaningful Use Measure Calculation List	156
Transmit	
Number of Patients who Viewed or Downloaded or	
Transmitted (VDT) Electronic Health Information	
Meaningful Use Measure Calculation List	156
Treatment	
ADA Code Description for Today's Completed Work	
Patient Chart Printout	196
ADA Code Description of Completed Treatment	
Referral Recap Report	284
ADA Code Description of Treatment Still in Progress	
Referral Recap Report	284
ADA Code of Completed Treatment	
Referral Recap Report	284
ADA Code of Treatment Still in Progress	
Referral Recap Report	284
Amount for Today's Completed Work	
Patient Chart Printout	196
Amount of Completed Procedures for Patient	
Procedures Not Attached to Insurance Report	258
Continuing Care Prior Work Date	
Letter Merge Reports	152
Date of Completed Treatment	
Referral Recap Report	284
Tooth Number for Today's Completed Work	
Patient Chart Printout	196
Tooth Number of Completed Treatment	
Referral Recap Report	284
Tooth Surface of Completed Treatment	
Referral Recap Report	284
Total Amount of Charges for Today's Completed Work	
Patient Chart Printout	196
Treatment Area	
Next Appointment Treatment Area	
Patient Route Slip	216

Treatment Area (continued)

Tooth Surface		Amount of Treatment-planned Procedure	
Patient Treatment Case Report	218	Patient Chart Printout	196
Perio - Combined Graphic & Data Chart Report	228	Case Comments	
Perio - Data Chart Report	230	Practice Treatment Case Report	248
Perio - Exam Comparison Report	232	Patient Treatment Case Report	218
Perio - Pocket Depths Only Report	236	Case Expiration Date	
Practice Treatment Case Report	248	Practice Treatment Case Report	248
RVU Utilization Report	304	Case Finance Status	
Treatment Case Report	314	Practice Treatment Case Report	248
Treatment Plan Approval Report	316	Treatment Case Report	314
Treatment Plan Approval Status Report	318	Patient Treatment Case Report	218
Utilization Report	354	Case Name	
Walkout - Doctor's Statement	356	Patient Treatment Case Report	218
Walkout - Family Walkout	358	Practice Treatment Case Report	248
Patient Chart and Progress Notes Printout	194	Patient Proposed Treatment Case Report (Your Care Plan)	212
Tooth Surface of Completed Treatment		Case Notes	
Referral Recap Report	284	Treatment Case Report	314
Tooth Surface of Treatment Still in Progress		Patient Treatment Case Report	218
Referral Recap Report	284	Case Priority	
Treatment Area		Patient Treatment Case Report	218
Family Ledger Report	118	Case Severity	
Family Ledger Report (Single Family)	120	Practice Treatment Case Report	248
Multi-Code List	182	Case Status	
Patient's Ledger Report	220	Practice Treatment Case Report	248
Procedure Code List	256	Patient Treatment Case Report	218
Dental Diagnostic Code List	104	Date of Last Case Status Update	
Treatment In Progress		Practice Treatment Case Report	248
ADA Code Description of Treatment Still in Progress		Patient Treatment Case Report	218
Referral Recap Report	284	Date of Treatment-planned Procedure	
Referred Date of Treatment Still in Progress		Referral Slip	286
Referral Recap Report	284	Fee for Case	
Tooth Number of Treatment Still in Progress		Practice Treatment Case Report	248
Referral Recap Report	284	Patient Treatment Case Report	218
Tooth Surface of Treatment Still in Progress		Next Appointment Treatment Plan Visit	
Referral Recap Report	284	Patient Route Slip	216
Treatment Plan		Number of Scheduled Treatment-planned Procedures	
ADA Code Description for Treatment-planned Procedure		Practice Treatment Case Report	248
Patient Chart Printout	196	Number of Unscheduled Treatment-planned Procedures	
ADA Code Description of Treatment-planned Procedure		Practice Treatment Case Report	248
Referral Slip	286	Percent of Accepted Cases	
ADA Code of Treatment-planned Procedure		Practice Treatment Case Report	248
Referral Slip	286	Percent of Completed Cases	
Alternate Case Name		Practice Treatment Case Report	248
Practice Treatment Case Report	248	Percent of Pre-authorized Cases	
Treatment Case Report	314	Practice Treatment Case Report	248
Patient Treatment Case Report	218	Percent of Referred Cases	
Amount of Office Portion for Case		Practice Treatment Case Report	248
Patient Treatment Case Report	218	Percent of Scheduled Cases	
Amount of Patient Portion for Case		Practice Treatment Case Report	248
Practice Treatment Case Report	248	Pre-authorization Required	
Patient Treatment Case Report	218	Standard Coverage Tables Report	310
Amount of Primary Insurance Portion for Case		Insurance Coverage Tables Report	144
Practice Treatment Case Report	248	Tooth Number for Treatment-planned Procedure	
Patient Treatment Case Report	218	Patient Chart Printout	196
Amount of Secondary Insurance Portion for Case		Tooth Number of Treatment-Planned Procedure	
Practice Treatment Case Report	248	Referral Slip	286
Patient Treatment Case Report	218	Tooth Surface of Treatment-planned Procedure	
		Referral Slip	286
		Total Amount of Patient Portion for Case	
		Treatment Case Report	314

Treatment Plan (continued)

Total Amount of Primary Insurance Portion for Case	
Treatment Case Report	314
Total Amount of Scheduled Treatment Plans	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Total Amount of Secondary Insurance Portion for Case	
Treatment Case Report	314
Total Amount of Treatment Plan	
Treatment Case Report	314
Patient Treatment Case Report	218
Total Amount of Treatment Plans	
Treatment Plan Approval Status Report	318
Treatment Plan Approval Report	316
Total Amount of Treatment-planned Procedures	
Practice Treatment Case Report	248
Patient Chart Printout	196
Total Amount of Unscheduled Treatment Plans	
Unscheduled Treatment Plans (Detailed) Report	350
Unscheduled Treatment Plans (Condensed) Report	348
Total Fee for Case	
Treatment Case Report	314
Total Fee from Alternate Fee Schedule for Case	
Treatment Case Report	314
Total Number of Cases	
Practice Treatment Case Report	248
Treatment Plan Amount	
Referred By Patient Report	290
Unscheduled Treatment Plans (Condensed) Report	348
Unscheduled Treatment Plans (Detailed) Report	350
Referred By Doctor/Other Report	288
Treatment Plan Approval Status	
Treatment Plan Approval Report	316
Treatment Plan Approval Status Report	318
Patient Chart and Progress Notes Printout	194
Treatment Plan Status	
Patient Route Slip	216
Treatment-planned Procedure Amount	
Unscheduled Treatment Plans (Detailed) Report	350
Treatment-planned Procedure Date	
Unscheduled Treatment Plans (Detailed) Report	350
Treatment Case Report	314
Treatment Plan Approval Status	
Treatment Plan Approval Status	
Treatment Plan Approval Report	316
Treatment Plan Approval Status Report	318
Patient Chart and Progress Notes Printout	194
Type	
20+ Years Old for Financial Class Type	
UDS - Insurance Financial Class Report	330
Deductible Type	
Standard Coverage Tables Report	310
Insurance Coverage Tables Report	144
Transaction Type/Code	
Insurance Transaction Analysis Report	148

Type of Service Code

Type of Service Code	
Medical Code List	180
Type of Service Code Description	
Medical Code List	180

Uninsured

Number of Patients without Dental and Medical Insurance	
Practice Statistics Report	246
Number of Patients without Dental Insurance	
Practice Statistics Report	246
Number of Patients without Medical Insurance	
Practice Statistics Report	246

Union Number

Insurance Plan Union Number	
Provider IDs List	272
Insurance Carrier List	132

Unit

Time Units	
Procedure Code List	256
Multi-Code List	182

Unknown

Number of Unknown Gender	
UDS - Age/Gender Report	322
Number of Unknown Gender for Clinic	
UDS - Age/Gender Report	322
Number of Unknown Gender for Provider	
UDS - Age/Gender Report	322

Unscheduled Appointment

Number of Unscheduled Appointments Listed	
Unscheduled Appointment List (OM)	346
Unscheduled Appointment List (DX1)	344
Scheduled and/or Unscheduled Appointment	
Unscheduled Treatment Plans (Detailed) Report	350
Unscheduled Treatment Plans (Condensed) Report	348

Unscheduled Treatment

Number of Unscheduled Treatment-planned Procedures	
Practice Treatment Case Report	248
Total Amount of Unscheduled Treatment Plans	
Unscheduled Treatment Plans (Detailed) Report	350
Unscheduled Treatment Plans (Condensed) Report	348

Update

Date of Last Case Status Update	
Practice Treatment Case Report	248
Patient Treatment Case Report	218

Updated

Date Insurance Last Updated	
Insurance Carrier List	132

User

Number of Users	
UDS - Encounters and Users by Selected Procedure Codes Report	326
Number of Users for Financial Class Type	
UDS - Insurance Financial Class Report	330
Number of Users for Financial Class Type for Clinic	
UDS - Insurance Financial Class Report	330

User (continued)

Number of Users for Financial Class Type for Provider		Amount of Primary Insurance Portion for Visit	
UDS - Insurance Financial Class Report	330	Practice Treatment Case Report	248
Overriding User		Treatment Case Report	314
Audit Report - Clinics	30	Patient Treatment Case Report	218
Audit Report - Combined	32	Amount of Secondary Insurance Portion for Visit	
Audit Report - Patients	34	Practice Treatment Case Report	248
Audit Report - Providers/Staff	36	Treatment Case Report	314
Audit Report - Transactions	38	Patient Treatment Case Report	218
Audit Report - Appointments	26	Fee for Visit	
Total Number of Users for Financial Class Types		Practice Treatment Case Report	248
UDS - Insurance Financial Class Report	330	Treatment Case Report	314
User		Patient Treatment Case Report	218
Audit Report - Appointments	26	Fee from Alternate Fee Schedule for Visit	
Audit Report - Audit Log Status	28	Treatment Case Report	314
Audit Report - Clinics	30	Next Appointment Treatment Plan Visit	
Audit Report - Combined	32	Patient Route Slip	216
Audit Report - Patients	34	Number of Office Visits	
Audit Report - Providers/Staff	36	Meaningful Use Measure Calculation List	156
Audit Report - Transactions	38	Number of Office Visits for Insurance Carrier	
Audit Rights Report - Assigned Individually	40	Utilization Report	354
Audit Rights Report - Assigned to Groups	42	RVU Utilization Report	304
Audit Rights Report - Group Names	44	Number of Office Visits where Patient Received CS	
Audit Rights Report - Users to Groups	46	(Clinical Summary)	
Credit Card Transaction Report	80	Meaningful Use Measure Calculation List	156
Patient Information Accessed Report	200	Number of Patients 0 - 19 Years with Visit	
Patient Treatment Case Report	218	Clinical Quality Measures List	66
Assigned Rights Report	24	Number of Patients 18 - 85 Years with Outpatient Visits	
User Changed		(with Exclusions)	
Audit Rights Report - Users to Groups	46	Clinical Quality Measures List	66
Audit Rights Report - Assigned Individually	40	Number of Patients 18+ Years with Visits	
User Defined Category		UDS - Tobacco Use and Intervention Report	342
Patient User Defined Category		Clinical Quality Measures List	66
Patient List (Filtered)	206	Number of Patients 3 - 17 Years with Outpatient Visits	
User Defined Category		(with Exclusions)	
UDS - Patient Status Report	338	Clinical Quality Measures List	66
User Group		Unique Visit Count for Provider	
User Group		RVU Day Sheet Report	296
Audit Rights Report - Users to Groups	46	Visit	
Audit Rights Report - Assigned to Groups	42	Treatment Plan Approval Status Report	318
User Group Change		Treatment Plan Approval Report	316
Audit Rights Report - Group Names	44	Visit Number	
Vaccine		Practice Treatment Case Report	248
Vaccine Abbreviated Description		Treatment Case Report	314
Patient List (Filtered)	206	Patient Treatment Case Report	218
Veteran Status		Vital Sign	
Patient Veteran Status		Number of Patients 0 - 2 Years with Vital Sign Readings	
Patient List (Filtered)	206	Meaningful Use Measure Calculation List	156
Veteran Status		Meaningful Use Measure Calculation List	156
UDS - Patient Status Report	338	Number of Patients 2+ Years with Vital Sign Readings	
View		Meaningful Use Measure Calculation List	156
Number of Patients who Viewed or Downloaded or		Number of Patients 3+ Years with Vital Sign Readings	
Transmitted (VDT) Electronic Health Information		Meaningful Use Measure Calculation List	156
Meaningful Use Measure Calculation List	156	Number of Patients 3+ Years with Vital Sign Readings	
Visit		Meaningful Use Measure Calculation List	156
Amount of Office Portion for Visit		Number of Patients with Vital Sign Readings	
Patient Treatment Case Report	218	Meaningful Use Measure Calculation List	156
Amount of Patient Portion for Visit		Vitals	
Practice Treatment Case Report	248	Age	
Treatment Case Report	314	UDS - Age/Gender Report	322
Patient Treatment Case Report	218	Patient Health Assessment Report	198
		Blood Pressure	
		Patient Health Assessment Report	198

Vitals (continued)

Body Mass Index	
Patient Health Assessment Report	198
Height	
Patient Health Assessment Report	198
Pulse	
Patient Health Assessment Report	198
Weight	
Patient Health Assessment Report	198

Wait

Number of Wait/Will Call Appointments	
Appointment Statistics Report	20

Weight

Weight	
Patient Health Assessment Report	198

Widowed

Number of Widowed Patients	
Practice Statistics Report	246
Percent of Widowed Patients	
Practice Statistics Report	246

Will Call

Number of Wait/Will Call Appointments	
Appointment Statistics Report	20

Work Phone

Guarantor Work Phone Number	
Patient Route Slip	216
Guarantor Work Phone Number & Extension	
Collections Manager List	70
Patient Work Phone Extension	
Patient Ledger Report	202
Patient Questionnaire	214
Letter Merge Reports	152
Patient Work Phone Number	
Continuing Care Display List	76
Letter Merge Reports	152
Patient Ledger Report	202
Patient List	204
Patient List (Filtered)	206
Patient Notes Report	208
Patient Questionnaire	214
Patient Route Slip	216
Appointment Book View Printout	14
Spouse Work Phone Extension	
Patient Questionnaire	214
Spouse Work Phone Number	
Patient Questionnaire	214

Worker Status

Patient Worker Status	
Patient List (Filtered)	206
Worker Status	
UDS - Patient Status Report	338

Wrap Around

Subtotal of Wrap Around or Reconciliation Amount Collected for Financial Class Type (Current Year)	
UDS - Patient Related Revenue Report	336
Subtotal of Wrap Around or Reconciliation Amount Collected for Financial Class Type (Previous Years)	
UDS - Patient Related Revenue Report	336
Subtotal of Wrap Around or Reconciliation Amount Collected for Payer Category (Current Year)	
UDS - Patient Related Revenue Report	336

Subtotal of Wrap Around or Reconciliation Amount Collected for Payer Category (Previous Years)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Financial Class Type (Current Year)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Financial Class Type (Previous Years)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Patient (Current Year)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Patient (Previous Years)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Payer Category (Current Year)	
UDS - Patient Related Revenue Report	336
Total Wrap Around or Reconciliation Amount Collected for Payer Category (Previous Years)	
UDS - Patient Related Revenue Report	336
Wrap Around or Reconciliation Amount Collected for Patient (Current Year)	
UDS - Patient Related Revenue Report	336
Wrap Around or Reconciliation Amount Collected for Patient (Previous Years)	
UDS - Patient Related Revenue Report	336

Write-off

Amount of Bad Debt Write-offs for Patient	
UDS - Patient Related Revenue Report	336
Subtotal of Bad Debt Write-offs for Financial Class Type	
UDS - Patient Related Revenue Report	336
Subtotal of Bad Debt Write-offs for Payer Category	
UDS - Patient Related Revenue Report	336
Total Amount of Bad Debt Write-offs for Financial Class Type	
UDS - Patient Related Revenue Report	336
Total Amount of Bad Debt Write-offs for Patient	
UDS - Patient Related Revenue Report	336
Total Amount of Bad Debt Write-offs for Payer Category	
UDS - Patient Related Revenue Report	336

Year

Number of New Patients (in Month and Year)	
Practice Statistics Report	246
Number of Patients Due for Prophylaxis (on Month and Year)	
Practice Statistics Report	246
Number of Referred New Patients (in Month and Year)	
Practice Statistics Report	246
Percent of Patients Due for Prophylaxis (Month and Year)	
Practice Statistics Report	246
Percent of Referred New Patients (in Month and Year)	
Practice Statistics Report	246
Practice Fiscal Year Month	
Registration Information Report	294
Year	
Future Due Payment Plan Report - Monthly Totals	126
Years as Patient	
Patient Route Slip	216

YTD

Amount of Debit Adjustments (YTD)	
Practice Analysis Report	242

YTD (continued)

Amount of Estimated Primary Insurance Benefits Remaining YTD for Family		Amount of YTD Charge Adjustments for Provider	
Treatment Case Report	314	Day Sheet (Charges and Receipts) Report	94
Amount of Estimated Primary Insurance Benefits Remaining YTD for Patient		Day Sheet (Charges and Receipts) Report	94
Treatment Case Report	314	Amount of YTD Charges Billed to Insurance for Provider	
Patient Treatment Case Report	218	Day Sheet (Charges and Receipts) Report	94
Amount of Estimated Secondary Insurance Benefits Remaining YTD for Family		Amount of YTD Charges for Provider	
Treatment Case Report	314	Day Sheet (Charges and Receipts) Report	94
Amount of Estimated Secondary Insurance Benefits Remaining YTD for Patient		Amount of YTD Finance Charges for Provider	
Treatment Case Report	314	Day Sheet (Charges and Receipts) Report	94
Patient Treatment Case Report	218	Amount of YTD Late Charges for Provider	
Amount of Finance Charges (YTD)		Day Sheet (Charges and Receipts) Report	94
Practice Analysis Report	242	Amount of YTD Suspended Credit Adjustments for Provider	
Amount of Finance Charges YTD		Day Sheet (Charges and Receipts) Report	94
Walkout - Family Walkout	358	Amount of YTD Suspended Payments for Provider	
Amount of Guarantor Payments YTD		Day Sheet (Charges and Receipts) Report	94
Walkout - Family Walkout	358	Beginning Balance (YTD)	
Amount of Insurance Payments YTD		Practice Analysis Report	242
Walkout - Family Walkout	358	Ending Balance (YTD)	
Amount of Insured Charges (YTD)		Practice Analysis Report	242
Practice Analysis Report	242	New Patients (YTD)	
Amount of Late Charges (YTD)		Practice Analysis Report	242
Practice Analysis Report	242	Number of New Patients YTD	
Amount of Late Charges YTD		Day Sheet (Charges and Receipts) Report	94
Walkout - Family Walkout	358	Number of New Patients YTD for Provider	
Amount of Non-insured Charges (YTD)		Day Sheet (Charges and Receipts) Report	94
Practice Analysis Report	242	Referred Patients (YTD)	
Amount of Other Debit Adjustments (YTD)		Practice Analysis Report	242
Practice Analysis Report	242	Subtotal of Charges (YTD)	
Amount of Pending Estimated Primary Insurance Portions YTD for Family		Practice Analysis Report	242
Treatment Case Report	314	Total Amount of YTD Applied Credit Adjustments	
Amount of Pending Estimated Primary Insurance Portions YTD for Patient		Day Sheet (Charges and Receipts) Report	94
Treatment Case Report	314	Total Amount of YTD Applied Payments	
Patient Treatment Case Report	218	Day Sheet (Charges and Receipts) Report	94
Amount of Pending Estimated Secondary Insurance Portions YTD for Family		Total Amount of YTD Charge Adjustments	
Treatment Case Report	314	Day Sheet (Charges and Receipts) Report	94
Amount of Pending Estimated Secondary Insurance Portions YTD for Patient		Day Sheet (Charges and Receipts) Report	94
Treatment Case Report	314	Total Amount of YTD Charges	
Patient Treatment Case Report	218	Day Sheet (Charges and Receipts) Report	94
Amount of Primary Insurance Paid Benefits YTD for Family		Total Amount of YTD Charges Billed to Insurance	
Treatment Case Report	314	Day Sheet (Charges and Receipts) Report	94
Amount of Primary Insurance Paid Benefits YTD for Patient		Total Amount of YTD Finance Charges	
Treatment Case Report	314	Day Sheet (Charges and Receipts) Report	94
Patient Treatment Case Report	218	Total Amount of YTD Finance Charges for Family	
Amount of YTD Applied Credit Adjustments for Provider		Family Ledger Report (Single Family)	120
Day Sheet (Charges and Receipts) Report	94	Total Amount of YTD Insurance Payments for Family	
Amount of YTD Applied Payments for Provider		Family Ledger Report (Single Family)	120
Day Sheet (Charges and Receipts) Report	94	Family Ledger Report	118
		Total Amount of YTD Late Charges	
		Day Sheet (Charges and Receipts) Report	94
		Total Amount of YTD Late Charges for Family	
		Family Ledger Report (Single Family)	120
		Family Ledger Report	118
		Total Amount of YTD Payments for Family	
		Family Ledger Report (Single Family)	120
		Family Ledger Report	118
		Total Amount of YTD Suspended Credit Adjustments	
		Day Sheet (Charges and Receipts) Report	94
		Total Amount of YTD Suspended Payments	
		Day Sheet (Charges and Receipts) Report	94
		Total Charges (YTD)	
		Practice Analysis Report	242

YTD (continued)

Total YTD Finance Charges for Family Family Ledger Report	118
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Zero

Replace Initial Zero of Procedure Code on Claims Insurance Carrier List	132
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ZIP Code

Number of Charts Sampled in ZIP Code UDS - Sealant Statistics Report	340
Number of Medicaid and Medicare Patients in First Age Group in ZIP Code UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in Second Age Group in ZIP Code UDS - Medicaid/Medicare Report	334
Number of Medicaid and Medicare Patients in ZIP Code UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in First Age Group in ZIP Code UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in Second Age Group in ZIP Code UDS - Medicaid/Medicare Report	334
Number of Medicaid Patients in ZIP Code UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in First Age Group in ZIP Code UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in Second Age Group in ZIP Code UDS - Medicaid/Medicare Report	334
Number of Medicare Patients in ZIP Code UDS - Medicaid/Medicare Report	334
Number of Patients in ZIP Code Practice Statistics Report	246
Number of Patients with Moderate to High Risk of Car- ies in ZIP Code UDS - Sealant Statistics Report	340
Number of Patients with Moderate to High Risk of Car- ies who Got Sealants on Permanent First Molars in ZIP Code UDS - Sealant Statistics Report	340
Number of Patients without a ZIP Code Practice Statistics Report	246
Patient ZIP Code Patient List (Filtered)	206
Letter Merge Reports	152
Percent of Patients in ZIP Code Practice Statistics Report	246
Percent of Patients without a ZIP Code Practice Statistics Report	246
Practice City State and ZIP Code Letter Merge Reports	152
Practice ZIP Code Registration Information Report	294
ZIP Code UDS - Insurance Financial Class Report (2013)	332
UDS - Medicaid/Medicare Report	334
UDS - Patient Status Report	338
UDS - Sealant Statistics Report	340

UDS - Tobacco Use and Intervention Report	342
Practice Statistics Report	246