

## CHECK LIST - WINDOWS

### DAILY - Programs that you will be entering information throughout each day

<u>C</u> harge	<u>P</u> atient or \$ Icon	Enter all patient charges.
<u>P</u> ayment/Checkout	<u>P</u> atient or VISA Icon.	Enter patient payments, appts., and recalls.
<u>C</u> laims	<u>P</u> atient	Request insurance forms.
<u>I</u> nsurance Payments	<u>P</u> atient	Enter insurance payments.
<u>T</u> reatment Planning	<u>P</u> atient	Generate treatment plans, when desired.
<u>A</u> ppointment Directory	<u>R</u> eports / <u>S</u> cheduling	Generate a list of the next day's appointments.
<u>Q</u> uick Phone Registration	<u>R</u> eports / <u>D</u> aily	Register new patients when they call for appts.
<u>U</u> nbilled Work Report	<u>R</u> eports / <u>D</u> aily	Generates a report of patients we forgot to claim.
<u>A</u> ging	<u>M</u> aintenance	Aging of account balances.
<u>P</u> rint Manager	<u>F</u> ile	Print the Unbilled work report and delete aging.
<u>B</u> ackup		Check Back-Up Listing
<u>F</u> inancial Arrangements	<u>B</u> illing	Enter financial arrangements or promised payment plans.

### END OF DAY - Close out your day with these programs

<u>L</u> og Inquiry	<u>R</u> eports / <u>D</u> aily	Balance production totals and payments prior to printing the Daysheet
<u>D</u> aysheet	<u>R</u> eports / <u>D</u> aily	Used to balance production and payments.
<u>P</u> osting	<u>M</u> aintenance	Run, after verifying <u>both</u> charges & payments.
<u>I</u> nsurance Forms	<u>B</u> illing	Request Electronic Claims
<u>P</u> atient Care Forms	<u>R</u> eports / <u>D</u> aily	Generate patient care forms for the next days
<u>P</u> roduction Report	<u>R</u> eports / <u>M</u> onthly	Detail of daily production.
<u>I</u> nsurance Forms	<u>B</u> illing	Process insurance forms.

### WEEKLY - Suggested list of programs to run each week

<u>L</u> ost and Found Report	<u>R</u> eports / <u>D</u> aily	To find patients that do not have an appointment or recall in the system.
<u>L</u> etter Book	<u>R</u> eports/Misc.	Dentech Letter Book generate letters for patients and referrals.

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## MONTH END – DENTECH highly recommends programs run each month

<u>M</u> onth End Processing	<u>R</u> eports / <u>M</u> onthly	Is an “internal” program that stores monthly totals for future analysis. There is no associated report after generation. This program must be run prior to requesting analysis reports. (See Note)
<u>R</u> eset Maximums	<u>R</u> eports / <u>M</u> onthly	To reset annual maximums for insurance benefits. This should be run at the end of the last working day of the month or in the morning of the first working day of the month.

## MONTHLY PROCEDURES - Suggested monthly programs and reports

<u>L</u> ate Charges	<u>B</u> illing	Generates Late Charges to outstanding accounts.
<u>S</u> tatements	<u>B</u> illing	Generate patient statements.
<u>A</u> ccount Auditing	<u>R</u> eports / <u>L</u> ists	To see if any accounts are out of balance.
<u>R</u> ecall Directory	<u>R</u> eports / <u>M</u> onthly	Generate a report or database for selected months for patients recall.
<u>A</u> ppointment Directory	<u>R</u> eports / <u>M</u> onthly	To generate a report or database for selected monthly appointments.

## MONTHLY REPORTS - Suggested monthly reports

<u>R</u> evenue Report	<u>R</u> eports / <u>M</u> onthly	If applicable.
<u>P</u> roduction Report	<u>R</u> eports / <u>M</u> onthly	Summary only. Shows Gross & Net production by provider.
<u>P</u> roducer A/R	<u>R</u> eports / <u>M</u> onthly	Producer Account Receivable Report. Shows A/R total per provider. Separates Insurance A/R & Account A/R per provider, by patient.
<u>I</u> ncomplete Work Report	<u>R</u> eports / <u>M</u> onthly	Generates a list of all patients with outstanding treatment plans within a given time frame. For Claims and Predeterminations.
<u>I</u> nsurance Aging Report	<u>R</u> eports / <u>M</u> onthly	Aging report by patient balance.
<u>A</u> ged A/R Report	<u>R</u> eports / <u>M</u> onthly	To receive a summary of balances. Aged to 180 days.
<u>P</u> ayor Report	<u>R</u> eport / <u>M</u> onthly	A summary of all charges, payments & adjustments, including net change.
<u>A</u> ctivity Summary	<u>R</u> eport / <u>M</u> onthly	Shows all adjustments for a given time frame.
<u>A</u> ddjustment Report	<u>R</u> eport / <u>M</u> onthly	Creates a report of all payments.
<u>C</u> ollection Report	<u>R</u> eport / <u>M</u> onthly	A summary of each days bank deposit for a given period.
<u>B</u> ank Deposit Report	<u>R</u> eport / <u>D</u> aily	Generate Capitation Reports (if applicable)
<u>C</u> apitation Report	<u>B</u> illing	

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## TRAINING TIP

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### ANALYSIS REPORTS - (Month-end must be created first)

<u>P</u> lan Analysis Report	<u>R</u> eports / <u>A</u> nalysis	For specific Insurance company, Employer, or Form Code.
<u>P</u> ractice Analysis Report	<u>R</u> eports / <u>A</u> nalysis	For Production, Collection, Revenue, and Pay Class comparisons. These totals may be compared to a previous month or quarter if desired.
<u>R</u> eferral	<u>R</u> eports / <u>A</u> nalysis	Shows referral sources.

**\*\* NOTE\*\***

The suggested "monthly" reports may be run more frequently, if desired, and DO NOT necessarily have to be run at the end of the month.

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