



Dentrix Practice Management Reports

Practice Analysis Report

This report needs to be run for 2 different date ranges:

- 1/1/2019- 12/31/2019
- 1/1/2020- 12/31/2020

To run Practice Analysis report

1. In the **Reports** menu in the Office Manager, point to **Management**, and then click **Practice Analysis Reports**. The Practice Analysis Reports dialog box appears.

Practice Analysis Reports

Report Date: 11/27/2018

Select Provider:

All List Inactive

ID	Name	Status
DDS1	Smith, Dennis	Primary
DDS2	Smith Junior, Dennis	Primary
DDS3	Cook, Maria	Primary
ENDO	Evans, Erica	Primary
HYG1	Hayes, Sally	Secondary
ORTH	Oliverson, Oscar	Primary
PEDO	Childs, Brenda	Primary
PERI	Pearson, Paula	Primary
SURG	Sorensen, Steve	Primary

Select Billing Type:

All

- 1: Standard Billing - finance charges
- 2: Standard Billing - no finance charges
- 3: No Insurance
- 4: Insurance Family - Dual Insurance
- 5: Insurance Family - finance charges
- 6: Payment Plan - finance charges
- 7: Payment Plan - no finance charges
- 8: Bad Debt - at risk
- 9: Bad Debt - to collections

Date Range

From: 11/21/2018 To: 11/27/2018

Entry Date
 Procedure Date

Select Summary Reports

Production Summary
 ...by Category
 Include Cross Coding
 ...by Proc Code Range

From: <ALL> >...
To: <ALL> >...

Payment Summary
 Adjustment Summary
 Patient Summary

Print Batch Cancel



2. Select the desired providers <All>
3. Select the billing types <All>
4. In the **Report Date** field, leave as the defaulted date, this is the current system date.

5. In the **From** and **To** fields, type the date range that you want to analyze

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6. Select to display by **Entry Date**

7. Select the following summary reports available for you to view and/or print:
 - Production Summary Including Cross Coding
 - Production Summary by Procedure Code Range
 - Click the **From** and **To** search buttons to specify a procedure code range.
 - Payment Summary
 - Adjustment Summary

8. The reports you selected can be printed or sent to the Batch Processor for printing at a later time. Click **Print** to print the report now, If not given this option click **Batch** to generate the report and send it to the Batch Processor in the Office Manager and print reports from the Batch Processor.



Analysis Summary Report

This report needs to be run for 2 different date ranges:

- 1/1/2019- 12/31/2019
- 1/1/2020- 12/31/2020

To create the report

1. In the **Reports** menu in the Office Manager, point to **Management**, and then click **Analysis Summary**.

The **Analysis Summary** dialog box appears.

Analysis Summary

Report Date: 11/27/2018

Select Provider
From: <ALL> >... To: <ALL> >...

Select Billing Type
From: <ALL> >...
To: <ALL> >...

Select Date
From: 11/27/2018 To: 11/27/2018
 Entry Date
 Procedure Date

Select Report Types
 Daily Summary
 Provider Summary
 Inc MTD/YTD Totals
 Include All Totals
 Print Condensed Report

OK Cancel

2. Type the **Report Date** that you want to print on the report. The default is the current date.
3. Do the following:
 - **Select Provider** - Leave <ALL> selected in both fields to include all providers.
 - **Select Date** - Type the date range that you want to include in the **From** and **To** fields. By default, Dentrix enters the current date for the range.
Date Ranges:
 - 1/1/2019- 12/31/2019
 - 1/1/2020- 12/31/2020
 - **Select Entry Date** The entry date reflects the system date when the procedure was posted.
 - **Select Billing Type** - Leave <ALL> selected in both fields to include all billing types



4. Under **Select Report Types**, select the following:
 - **Provider Summary** - Prints totals for each provider in the provider range. Each total will include transactions for the provider with a date in the date range.
 - **Include MTD/YTD Totals** to include MTD, YTD, and Previous Month totals for each provider on the report.
5. Select **Include All Totals**
6. Select **Print Condensed Report**
7. Click **OK** to send the report to the [Batch Processor](#).
8. Print Report from Batch Processor

Fee Schedule Report

To generate the report

1. In the **Reports** menu in the Office Manager, point to **Reference**, and then click **Fee Schedules**.

The **Fee Schedule** dialog box appears.

Fee Schedule dialog box showing the following fields and options:

- Report Date: 11/27/2018
- Select Procedure Code: From: <ALL> To: <ALL>
- Select: 1 Fee Schedule Range of 5 Fee Schedules
- Select Fee Schedule: 1. FEE 1
- Buttons: OK, Cancel

2. Keep **Report Date** as the default (current date).
3. Under **Select Procedure Code**, select the range of procedure codes you want to include by doing the following:
 - Click the **From:** Keep default of **<ALL>**
 - Click the **To:** Keep default of **<ALL>**



- Under **Select**:
 - Select **1 Fee Schedule**.
- Click **OK** to send the report to the [Batch Processor](#).
- Print Report from the Batch Processor

Aging Report

To generate the report

- In the **Reports** menu in the Office Manager, point to **Ledger**, and then click **Aging Report**. The **Aging Report** dialog box appears.

Aging Report

Report Date: 11/27/2018

Select Guarantor: From: <ALL> To: <ALL>

Select Primary Provider: From: <ALL> To: <ALL>

Select Billing Type: From: <ALL> To: <ALL>

Min Balance to Print: <ALL> Last Pmt Before: <CURRENT>

Minimum Days Past Due: Over 0 Over 30 Over 60 Over 90

Sort Options: By Guarantor Name By Over 90 to Current Balance By Largest to Smallest Balance

Select Report Types: Standard Aging Credit Balances Provider Credits

Calculate Aged Balance as of 11/27/2018 Print Guarantor Note

Print to File Save as Default

OK Cancel

- Leave Report date defaulted to today's date.
- Do the following:
 - Select Guarantor** - Leave **<ALL>** selected in both fields to include all guarantors.
 - Select Primary Provider** - Leave **<ALL>** selected in both fields to include all primary providers.
 - Select Billing Type** - Leave **<ALL>** selected in both fields to include all billing types.
- Type the minimum balance in the **Min Balance to Print** field.
Type: \$1.00



5. Type the last payment amount in the **Last Pmt Before** field.
Leave <CURRENT>, in this field
6. Set the following options:
 - **Minimum Days Past Due** - Select the minimum days past due for the Aging Report.
 - **Select** Over 0
 - **Sort Options** - Select how to sort accounts on the Aging Report.
 - **Select** By Guarantor Name
 - **Select Report Types** - Select the type of report that you want to print.
 - **Select** Standard Aging
7. Select one or more of the following options:
DO NOT SELECT ANY OF THE OPTIONS BELOW
 - **Calculate Aged Balance as of** - Calculates each aged balance by a certain date. Type the desired date. If you select this option, the Aging Report takes longer to generate because Dentrix recalculates each balance as of the date you entered.
 - **Print Guarantor Note** - Includes the first line of a guarantor's note if a guarantor note is not attached in the Ledger.
 - **Print to File** - Saves the report as a tab-delimited file. Type a name for the report with a ".txt" extension.
 - **Save as Default** - Saves the changes you have made as the default settings for the report.
8. Click **OK** to send the report to the [Batch Processor](#).
9. Print ONLY THE LAST PAGE (where it shows totals) of this report