



2021

Checking the Pulse of your Practice

Presented By: Mary Kohlmeier, RDH



Your Practice is Important!

Your Practice lifestyle should reflect the success of your Practice and the Patient Experience that we wish for all our patients that come to our office! In order to be successful and productive, certain steps need to take place within your practice to ensure this:

- Proper reporting methods and “reading” your reports
- Understanding the numbers that you see
- Building relationships with your patients: The Patient Experience
- Look at your Patient numbers
- Teamwork Counts!
- Key Reports every office should be processing in their software
- Treatment Acceptance to build productivity
- Increase your Practice’s Profitability: Harvest your hidden data
- Attract new Patients and Keep the Ones you have

Can you tell if a Practice is “healthy” from your reports? Take a look at the numbers, they will tell you a story.

Let's first look at an Analysis of your Practice. One report that every office should be looking at on a weekly basis is their Patient Analysis report. This should show where the office stands with a description of the largest percentage of the type of patients you see, how often your patients are being seen, where your patients demographically are coming from, as well as your active patient base, Insurance Base and Hygiene Recare.

Keep an eye on patients seen in the last 12 months, 24 months, 36 months and Seen More than 36 months ago and review those percentages.

Patient Analysis Report

Male and Female

| Category: | # of | % of |
|-----------|--------|--------|
| | Active | Active |
| Male: | 88 | 48.59% |
| Female: | 91 | 51.41% |

Age Breakdown of Patients

| | | |
|-------------|----|--------|
| Ages 0 - 9: | 2 | 1.13% |
| 10-19: | 7 | 3.95% |
| 20-29: | 24 | 13.56% |
| 30-39: | 28 | 14.69% |
| 40-49: | 48 | 27.12% |
| 50-59: | 21 | 11.86% |
| 60-69: | 4 | 2.26% |
| 70+: | 4 | 2.26% |
| Unknown: | 41 | 23.16% |

| | | |
|------------------------|-----|--------|
| Have Insurance: | 146 | 82.49% |
| Do Not Have Insurance: | 31 | 17.51% |

Patients Who Do or Do Not Have Insurance

Active: 177

Inactive: 8

Total Patients: 185

Patients Who are Marked Active or Inactive

| Category: | # of | % of |
|-----------|--------|--------|
| | Active | Active |

| | | |
|----------------------------------|----|--------|
| Seen In Last 12 Months: | 62 | 35.03% |
| Seen In Last 24 Months: | 11 | 6.21% |
| Seen In Last 36 Months: | 64 | 36.16% |
| Seen More Than 36 Months Ago: | 25 | 14.12% |
| Patients w/out Last Visit Date: | 15 | 8.47% |
| New Patients Seen This Month: | 0 | 0.00% |
| New Patients Seen This Year: | 7 | 3.95% |
| Patients w/out First Visit Date: | 15 | 8.47% |
| Future Recalls: | 49 | 27.68% |
| Past Due Recalls: | 84 | 47.46% |
| Without Recalls: | 44 | 24.86% |

| | | |
|------------------------|-----|--------|
| Future Appointments: | 54 | 30.51% |
| Past Due Appointments: | 0 | 0.00% |
| Without Appointments: | 123 | 69.49% |

of Patients Who Meet This Criteria

Active Patients By Top Ten Zip Codes

| Zip Code: | City: | # | % |
|-----------|---------|-----|---------|
| 99999 | Anytown | 177 | 100.00% |

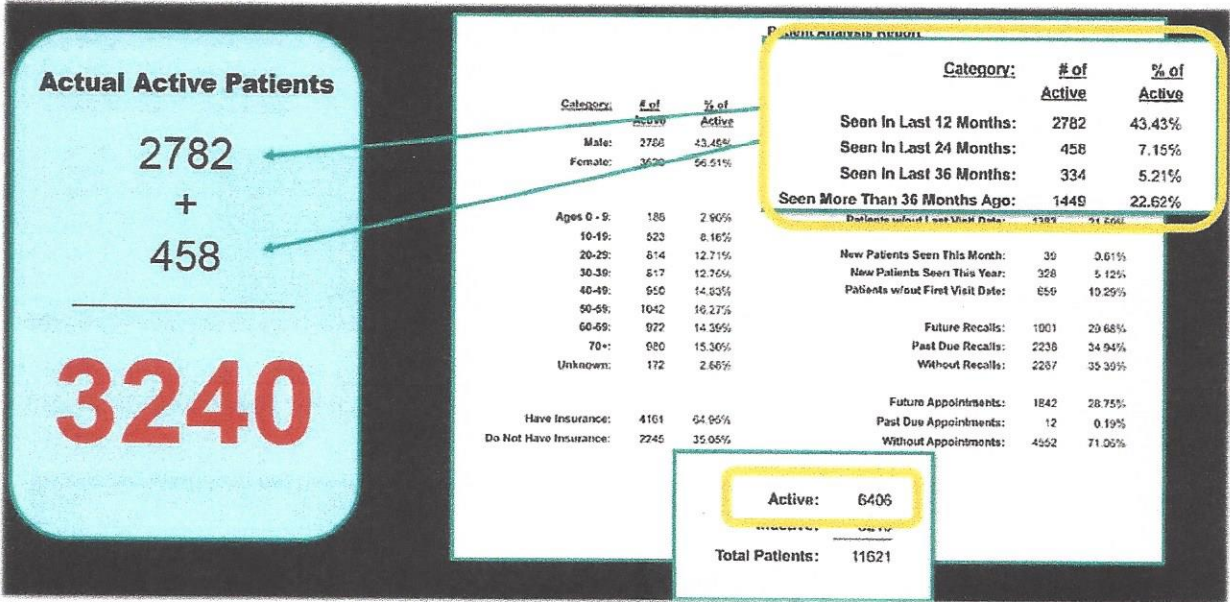
Breakdown of Patients by Zip Code

It is important that everyone have an accurate picture of their practice. Ask yourself 3 basic questions:

- 1. How many Active Patients do you currently have?
- 2. What do you believe is your current Patient Retention Rate?
- 3. How many of your patients do you schedule 6 months in advance? What is your current protocol for scheduling future hygiene recalls?

Go back into Eaglesoft and see how close or how far off you are from your assumptions. These are very important stats to monitor and should be consistently reviewed. As long as a patient is marked active in the system they are going to show up here on the Patient Analysis Report. Which means, depending on how frequently you are updating patient charts, this could be accurate or it could be way off and incredibly misleading.

Here is how to use this report to confirm if your numbers are accurate.



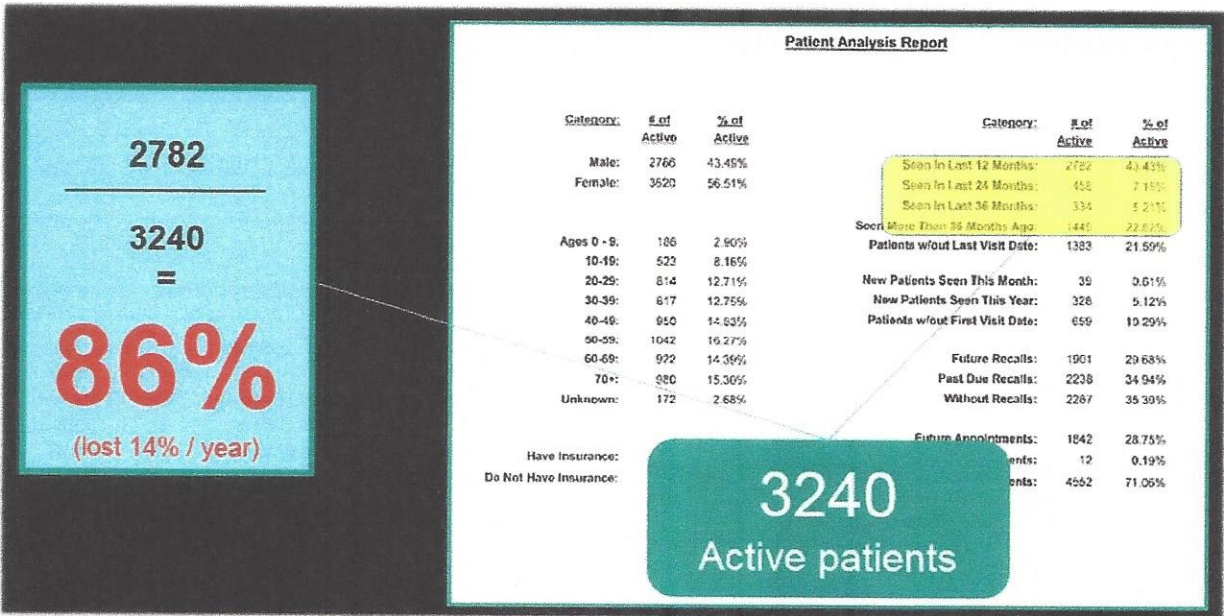
The first 4 rows (highlighted in yellow) show you the number of patients who have been in this practice over the course of several different time frames. You can see here that this practice saw roughly 43% of their patients in the last 12 months. Followed by only about 7% between 12 and 24 months ago and 5% between 24 and 36 months ago. And then you have the over 36 months number next.

Most Practice Management consultants consider your active patients are those who you have seen between the last 12 and 24 months. So, what does that mean for this practice?

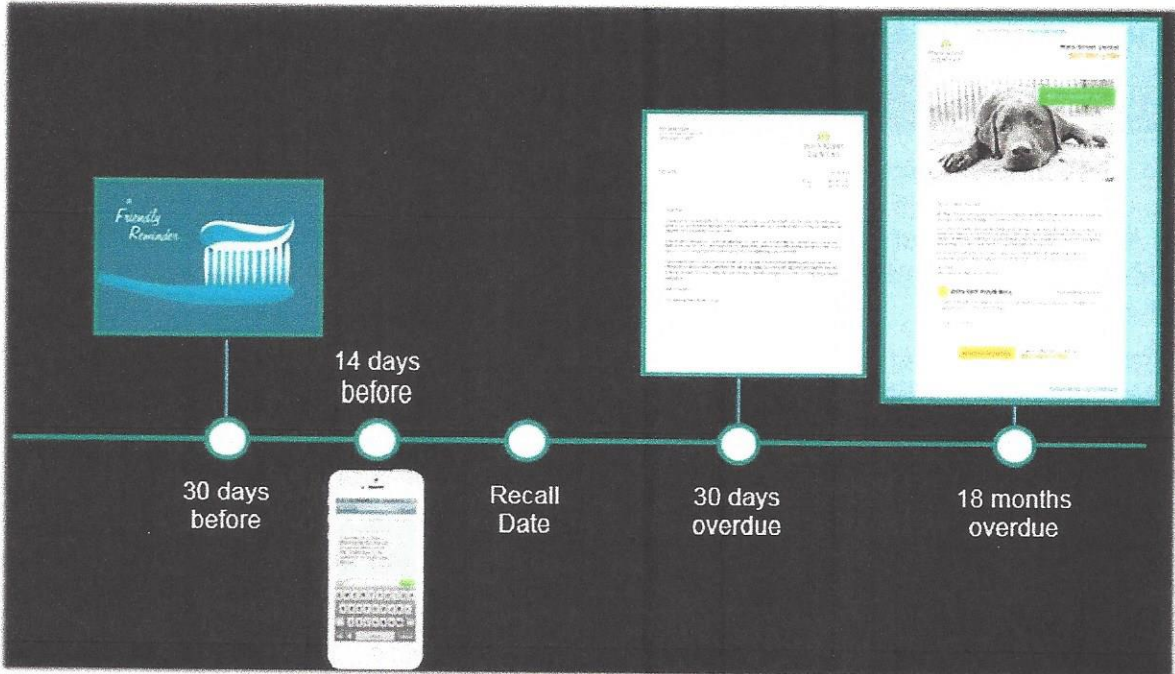
Even though the report states they have over 6000 active patients, only a little over 3000 have actually been into the practice in the last 24 months. Review your report at your practice and see.

After reviewing how many actual "Active Patients" you have, the next step is to look at Patient Retention. This is important to monitor because it shows us how well patients are connecting with your practice and if they are engaged.

Often times, patients will leave after the first visit if their "pain" is addressed and they are not engaged in a preventive care relationship. Many more patients drop after their 6 month hygiene visit if they are not actively scheduled ahead. We want to keep patients long term and not live or die by new patient flow. The Patient Analysis Report will help you to calculate your practice Patient Retention Rate.



Are you keeping your patients actively engaged by communicating with them? Are you using recall emails and "cards"? Are you automating your Recall and Patient Reactivation in order to keep that consistent patient communication?



Next, you need to take an Analysis of your Adjusted Production/Collections in comparison with your Overhead. Take into account:

- Staff Salaries and other Staff Costs (examples would be team meetings, employee benefit plans, payroll taxes, etc)
- Lab Expenses
- Supplies
- Practice Development/Coaching
- Administrative Costs: Utilities, CE, Advertising, Insurance, Legal Fees, Occupancy Expenses, etc.

What percentage is your office at with Overhead????? 65 – 67%???

Your Accounts Receivable amount from your practice should NOT exceed 1 time your Monthly Production.

Look at Eaglesoft's Reports to calculate this.

The Accounts Receivable by Responsible Party Report can be filtered with different methods. Make sure to look at your report without filtering to ensure an accurate number. Any credits on your Accounts Receivable are part of your practice and should be taken into consideration when calculating this. There may be balances from family and friends that need to be adjusted from the total A/R.

Also look at the aging categories to see where the larger percentage of the practice's A/R is coming from. As balances age, the probability of collecting these amounts slow down.

| ACCOUNTS RECEIVABLE BY RESPONSIBLE PARTY | | | | | | | | | |
|---|------------|---------|---------|----------|----------|------------|------------|------------|--|
| Responsible Party | Current | 20 Days | 60 Days | 90 Days | Contract | Total A/R | -Est. Ins. | =Due Now | |
| Account Criteria | | | | | | | | | |
| <input type="checkbox"/> Range of Account Balances | | | | | | \$120.00 | \$0.00 | \$120.00 | |
| <input type="checkbox"/> Last Personal Payment Date | | | | | | \$45.00 | \$0.00 | \$45.00 | |
| <input type="checkbox"/> Last Personal Payment Amount | | | | | | \$45.00 | \$1,854.00 | \$3,835.00 | |
| <input type="checkbox"/> Ortho Patients Only | | | | | | \$255.70 | \$5,765.20 | \$1,762.50 | |
| <input type="checkbox"/> Exclude Ortho Patients | | | | | | \$801.00 | \$255.05 | \$504.95 | |
| Account Type(s): | | | | | | \$1,422.35 | \$2,422.35 | \$0.00 | |
| <input type="checkbox"/> Disregard Balance | | | | | | \$540.00 | \$0.00 | \$540.00 | |
| <input checked="" type="radio"/> Current (or higher) | | | | | | \$100.00 | \$0.00 | \$1,000.00 | |
| <input type="radio"/> Thirty Day (or higher) | | | | | | \$195.95 | \$0.00 | \$195.95 | |
| <input type="radio"/> Sixty Day (or higher) | | | | | | \$242.00 | \$0.00 | \$2,242.00 | |
| <input type="radio"/> Ninety Day (or higher) | | | | | | \$207.80 | \$1,627.55 | \$580.15 | |
| | | | | | | \$825.00 | \$770.50 | \$58.50 | |
| | | | | | | \$825.45 | \$555.00 | \$157.45 | |
| | | | | | | \$393.00 | \$555.00 | \$425.00 | |
| | | | | | | \$784.00 | \$1,458.00 | \$288.00 | |
| | | | | | | \$100.00 | \$58.00 | \$32.00 | |
| | | | | | | \$500.00 | \$700.00 | (\$200.00) | |
| | | | | | | \$500.00 | \$350.00 | \$140.00 | |
| | | | | | | \$540.00 | \$0.00 | \$540.00 | |
| | | | | | | \$105.00 | \$0.00 | (\$105.00) | |
| | | | | | | \$25.00 | \$0.00 | \$25.00 | |
| | | | | | | \$401.80 | \$1,315.50 | \$355.00 | |
| | | | | | | \$545.50 | \$315.50 | \$230.00 | |
| | | | | | | \$425.00 | \$1,040.00 | \$395.00 | |
| | | | | | | \$550.50 | \$40.00 | \$550.50 | |
| | | | | | | \$285.25 | \$275.25 | \$10.00 | |
| 117 Brown, Billy | \$225.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$225.00 | \$225.00 | \$0.00 | |
| 95 Brown, Bev J | \$825.00 | \$0.00 | \$0.00 | \$100.00 | \$0.00 | \$995.00 | \$825.00 | \$180.00 | |
| 125 Brown, Brad | \$1,054.35 | \$0.00 | \$0.00 | \$10.00 | \$0.00 | \$1,104.35 | \$1,040.00 | \$64.35 | |

Another report to review is your practice Day Sheet. This report has the numbers needed to calculate your practice %. Process your Day Sheet Report for the month and review.

As you can see, this sample Day Sheet has the monthly production amount, with adjustments and our Insurance PPO write offs taken off this figure. This office uses fee schedules for their participating Insurance Plans and all other adjustment types that should impact the office production are set for "impacting production" and taken at the time of entry.

You will also see the ending Accounts Receivable figure for this practice on the same report. Reviewing this report will give you approximate percentages. This sample office's Accounts Receivable is approximately 1.3 times their monthly production.

| Type | Production | Collections | Adjustments | A.R. Impact |
|--------------------------------|-------------|-------------|--------------|----------------------------|
| Services | \$56,118.00 | --- | --- | \$56,118.00 |
| Deleted Services | (\$210.00) | --- | --- | (\$210.00) |
| Taxes | \$200.00 | --- | --- | \$200.00 |
| Deleted Taxes | \$0.00 | --- | --- | \$0.00 |
| Discounts | \$0.00 | --- | --- | \$0.00 |
| Deleted Discounts | \$0.00 | --- | --- | \$0.00 |
| Returned Checks | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Returned Check Service Charges | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Debit Adjustments | \$0.00 | (\$100.00) | \$2,020.00 | \$2,120.00 |
| Finance Charges | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Billing Charge | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Deleted Debits | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Cash Payments | --- | \$1,603.40 | --- | (\$1,603.40) |
| Check Payments | --- | \$22,147.00 | --- | (\$22,147.00) |
| Other Payments | --- | \$12,619.50 | --- | (\$12,619.50) |
| Credit Adjustments | (\$11.00) | \$112.00 | (\$2,425.00) | (\$2,548.00) |
| Deleted Credits | \$0.00 | (\$156.00) | \$300.00 | \$456.00 |
| Write Offs | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Totals: | \$56,097.00 | \$36,125.90 | (\$105.00) | |
| | | | | Beginning A.R. \$52,565.40 |
| | | | | Change in A.R. \$19,866.10 |
| | | | | Ending A.R. \$72,431.50 |

System Summary For Activ

!)

| | | | | | |
|---------------------------|---------------|-----------------|-----------------|---------------------------|-------------|
| Total Payments: | \$31,967.90 | Less Trans Pmts | \$31,967.90* | Total Production | \$56,097.00 |
| Total Walkouts | \$56,108.00** | Less Est. Ins | \$29,033.60**** | Total Collection | \$36,125.90 |
| Payments Made On Walkout | \$22,111.90 | | | Collection Ratio | 64.40% |
| Walkout Collection Ratio | 39.41%*** | | 76.16%***** | | |
| Patients Seen | 122 | | | Patients Seen | 122 |
| Total Production | \$56,097.00 | | | Total Collection | \$36,125.90 |
| Avg. Production Per Visit | \$459.81 | | | Avg. Collection Per Visit | \$331.43 |

Many practices that accept Insurance payments, whether participating with Insurance plans or not, need to look at the Outstanding Claims by Aging Category report and review balances out to Insurance, to be sure there is a consistent flow of collection into the practice from these outstanding Insurance Claims. This report will show the insurance Co.'s and all of the patients with open claims. This is a great report for your team to use and with one phone call will take care of multiple outstanding claims on different patients. At the bottom of this report you will see the aging of the claims and the dollar amount outstanding for each aging category. This is

Another helpful insurance report to review monthly is the Insurance Company Productivity Report. This will show month-to-date and year-to-date totals of claims and amounts submitted and received under currently assigned Insurance Companies. This report requires processing prior to running your End of Month, as the totals change for each month

| INSURANCE COMPANY PRODUCTIVITY | | | | | | | | |
|--|----------------------------|----------------------------|---------------------------|---------------------------|----------------------------|----------------------------|---------------------------|---------------------------|
| Insurance Company | MTD Claims Submitted | MTD Amount Submitted | MTD Claims Received | MTD Amount Received | YTD Claims Submitted | YTD Amount Submitted | YTD Claims Received | YTD Amount Received |
| Aetna Life Ins Co P.O. Box 555 Anytown, IL - ID #10 | 1 | \$273.00 | 0 | \$0.00 | 1 | \$273.00 | 0 | \$0.00 |
| Aetna Life Ins Co P.O. Box 555 Anytown, IL - ID #4 | 5 | \$1,335.00 | 1 | \$500.00 | 5 | \$1,335.00 | 1 | \$500.00 |
| Cigna P.O. Box 555 Anytown, IL - ID #7 | 8 | \$2,526.00 | 1 | \$152.00 | 8 | \$2,526.00 | 1 | \$152.00 |
| Connecticut General P.O. Box 555 Anytown IL - ID #5 | 2 | \$410.00 | 0 | \$0.00 | 2 | \$410.00 | 0 | \$0.00 |

Another area of reporting that is crucial to be tracking and checking on a regular basis, is the practice’s outstanding Treatment proposed to your patients, found under the Detailed Treatment Plans Report. Analyze your practice and review what treatment has been:

- Proposed to your patients
- Accepted and scheduled
- If not scheduled, the reason
- How to increase Case Acceptance and Schedule these patients

Patient Communication is key to Case Acceptance. Reviewing this with your team on a regular basis helps to define where the practice is headed and how to build on your Case Acceptance rate.

| | | | | | |
|-------------------------|------------|---|----|-----------------------------------|-------------|
| | | | | Subtotal For This Appointment: | \$195.00 |
| | | | | Total Proposed/Posted to Walkout: | \$0.00 |
| | | | | Total Accepted: | \$195.00 |
| | | | | Total Completed: | \$0.00 |
| | | | | Total Referred: | \$0.00 |
| | | | | Total Plan: | \$195.00 |
| 82 - Wilson, Harrison R | 12/04/2013 | D7210 SURGICAL REMOVAL OF ERUPTED TOOTH | 15 | Accepted RKM 10/15/2012 | \$80.00 |
| | | | | Subtotal For This Appointment: | \$80.00 |
| | | | | Total Proposed/Posted to Walkout: | \$0.00 |
| | | | | Total Accepted: | \$80.00 |
| | | | | Total Completed: | \$0.00 |
| | | | | Total Referred: | \$0.00 |
| | | | | Total Plan: | \$80.00 |
| | | | | Total Proposed/Posted to Walkout: | \$20,113.80 |
| | | | | Total Accepted: | \$38,736.80 |
| | | | | Total Completed: | \$0.00 |
| | | | | Total Referred: | \$0.00 |
| | | | | Total of Treatment Plans: | \$58,850.60 |

Money Finder: FAQ # 9866

Eaglesoft has a great Practice Management feature, Money Finder, which can pull certain criteria in order to process specific reports. Look to generate a list of your patients that have outstanding Treatment services that are not scheduled. Have your team contact these patients, whether by phone communication, email or bulk letter mailings.

The Money Finder

Categories: (Custom)

NRA: NPA:

☒ Patients Not Scheduled

Select Only Patients Who:

☐ Are On Short Notice

☐ Deductible Does Not Apply To Prev.

☐ Have Cancelled Or Failed Appointments

Have Appt Time Preference: [All]

Have Insurance Status Of: [All]

Have Preferred Dentist Of: [All Providers]

Recall Note Includes:

Include Patients That Match The Following:

New Oral Planned Service

From To t/Or

New Oral Planned Service 11/10/2013

Add Delete

Utilize electronic methods as well to communicate with your patients that have outstanding treatment. These online tools monitor Eaglesoft for outstanding treatment plans and automatically follows-up with your patients using professional treatment presentation letters and patient education videos utilizing our CAESY Cloud presentations.

TREATMENT PLAN FOLLOW-UPS


Trial Version

[Back to Communications List](#)

This campaign is current,
ACTIVE
Save & Exit

ATTEMPT 1

Preview



Edit Message

SETTINGS


Schedule
1 Day(s) after the treatment plan has been created

Delivery Method
☒ Email

Edit Settings

ATTEMPT 2

Preview



Edit Message

SETTINGS

Schedule
15 Day(s) after the treatment plan has been created

Activate this attempt? YES

Edit Settings



Dear Sample,

We wanted to follow-up with you regarding your last visit at Main Street Dental. Looking at your chart, it seems like the doctor recommended one or several procedures to you, but you haven't yet scheduled an appointment to get started.

We're attaching a summary of your treatment plan below. Please remember that waiting to start your treatment is never a good idea. With our schedule filling up fast, we advise that you [request an appointment today](#).

| | | | | | |
|---|-------|----------------------------|------------|---------------|------------|
| Extract erupted tooth or exposed root - tooth #13 D7140 | | | | | |
|  | Video | Learn more | Total cost | Ins. estimate | Your cost |
| | | | \$70.00 | \$20.00 | \$50.00 |
| Surgical placement of implant body - tooth #13 D6010 | | | | | |
|  | Video | Learn more | Total cost | Ins. estimate | Your cost |
| | | | \$1,375.00 | \$687.50 | \$687.50 |
| Custom abutment - tooth #13 D6057 | | | | | |
| Learn more | | | Total cost | Ins. estimate | Your cost |
| | | | \$650.00 | \$35.00 | \$615.00 |
| Abutment supported porc/ceramic crowns - tooth #13 D6058 | | | | | |
| Learn more | | | Total cost | Ins. estimate | Your cost |
| | | | \$905.00 | \$0.00 | \$905.00 |
| Your total estimated cost: | | | | | \$2,257.50 |

Disclaimer: Insurance coverage is only an estimate. Guarantor is responsible for all treatment not covered by insurance. Our fees are guaranteed for 90 days from the day of this notice.

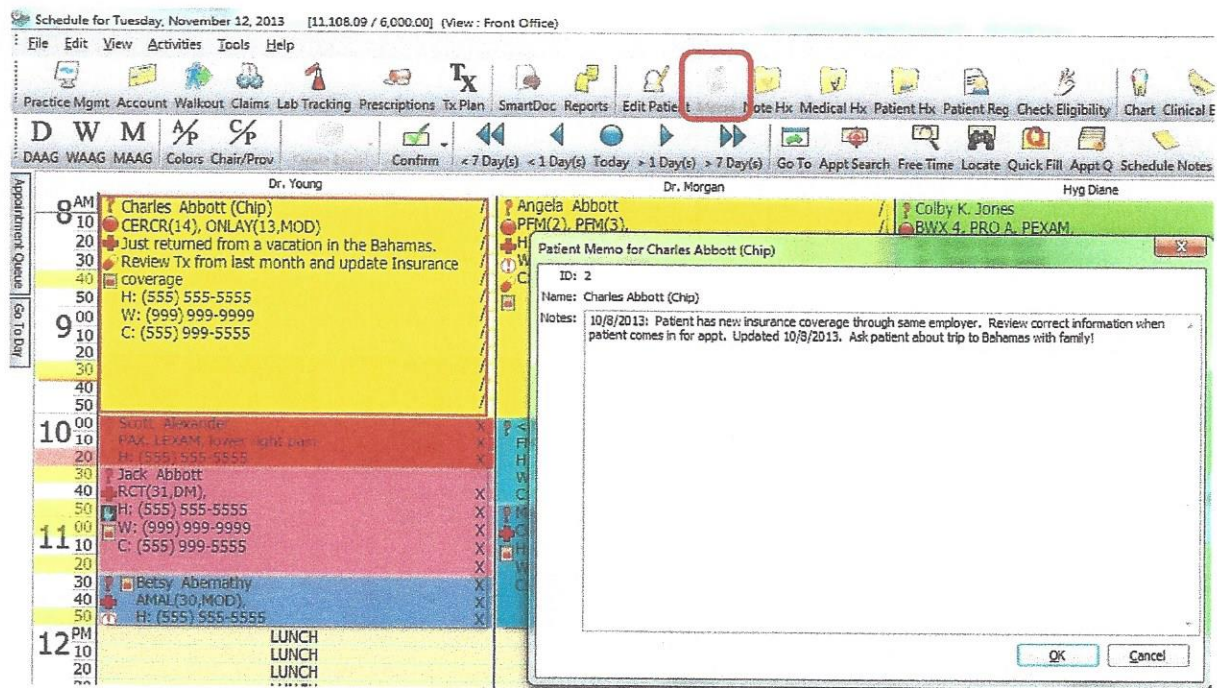
[Request an Appointment](#)

or call our office today to learn more
847-597-1750

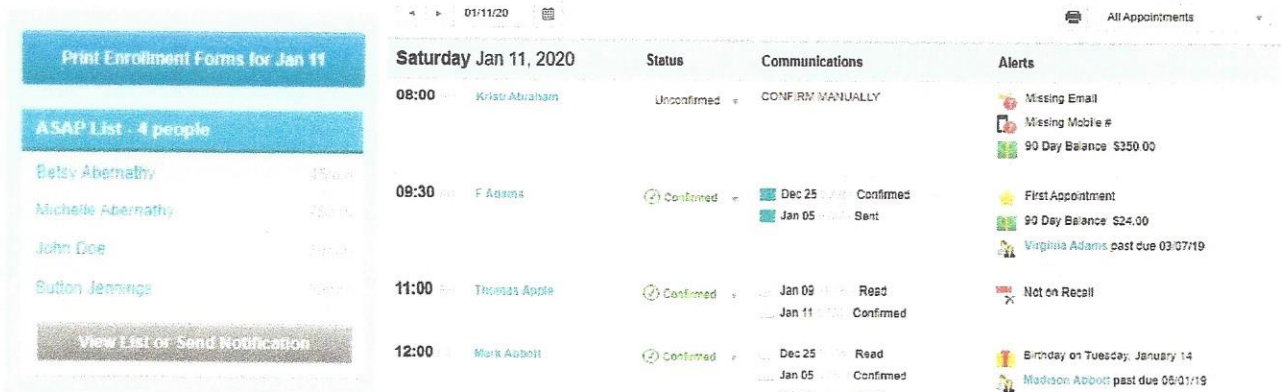
Many options are available and need to be utilized in order to build your practice productivity.

The Memo Field for the Patient: FAQ # 15409

Let us look at how your team communicates with your patients; whether on the phone or working directly with them in your office. **First impressions count with your patients!** When scheduling a patient, have your team get to know that person by asking questions and taking notes from their conversation. Add these notes to the appointment and to the patient file under the "Memo" button within Eaglesoft. This information can be reviewed at any time by your team prior to working directly with the patient.



Have specific confirming methods in order to get positive results and fewer cancellations. The proper use of certain verbal skills, as well as electronic confirmations, can aid in preventing cancellations on a regular basis.



Communication beyond the Dental Office:

CAESY Printables: See FAQ # 9603 & 8475

In *Eaglesoft* Version 15.0, CAESY Printable PDFs were added and included as part of the software. Provide patient education take-home materials by attaching CAESY Printable files to specific service codes. CAESY Printable materials are available for Post-Op and Preventive measures only.
CAESY Printable PDFs can be printed in English only.

Note: CAESY Printable files require installation of Adobe Acrobat Reader Version 7.0 or later. The link to the latest version installation can be found on **FAQ #4069**.

CAESY Printable Preferences

The screenshot shows the 'Preferences' window with the 'Printing' tab selected. The 'Print Associated CAESY Presentations During Walkout' checkbox is checked and circled in red. Other options include 'Print Return Address On Envelopes', 'Print Statement at Time of Walkout', and 'Print Insurance Claim at Time of Walkout'. The 'Rx Form Type' is set to 'GENERIC FORM'. The 'Print in 5 1/2" w. x 4 1/4" h. layout' checkbox is also checked.

In the Printing Preferences tab, select 'Print Associated CAESY Presentations During Walkout' and click 'OK' to save changes. This allows the user to automatically print any associated CAESY information with the patient's walkout.

CAESY Printables Setup

Service Code: D7140
ADA Code: D7140
Display Abbr: EXT
Description: EXTRACT-ERUPTED TOOTH OR EXPOSED ROOT
Service Times: ORAL SURGERY
Master Standard Fee: \$117.00 Last Changed: 05/05/2014
Time Units: 3
Relative Value Units: 3
Affected Area: Tooth
Preferences:
☐ Tagable Service ☐ Allow Free Form Description
☒ Submit On Insurance ☒ Generates PostOp Call
☒ Apply Discount ☐ Generates Lab Case
☒ Active
☐ Updates Patient Recall
☐ Update Patient's Last Bitewings
☐ Update Patient's Last Full Mouth Series
☐ Update Patient's Last Panoramic
AMA Info:
Diagnosis Code:
CPT:
Modifier:
Normally Performed By:
☒ Dentist ☐ Hygienist
Buttons: Notes, Productivity, History, Fee Schedule, Chart Setup, Post Proc., Standard Fee, **PRINTABLES** (circled), OK, Cancel

To attach CAESY Printables to a service code, select Lists | Services. Select the desired service code and select Edit. In the edit service code window, select the Printables button.

CAESY Printables assignment for Service Code: D7140
Find Preview (circled)

| | |
|-------------------------------------|--|
| <input type="checkbox"/> | Homecare - Permanent Crowns |
| <input type="checkbox"/> | Homecare - Root Canal Therapy |
| <input type="checkbox"/> | Homecare - Resin Fillings |
| <input type="checkbox"/> | Homecare - Permanent Bridges |
| <input checked="" type="checkbox"/> | Post-Op Instructions - Extractions |
| <input type="checkbox"/> | Homecare - Permanent Indirect Restorations |
| <input type="checkbox"/> | Homecare - After Implant Surgery |
| <input type="checkbox"/> | At Home Whitening |
| <input type="checkbox"/> | Homecare - Scaling and Root Planing |
| <input type="checkbox"/> | Homecare - Implant Fixed Restoration |
| <input type="checkbox"/> | Homecare - Perio Surgery |

*** Double click item to toggle assignment

In the CAESY Printables assignment window, select the checkbox pertaining to the desired CAESY Printable form(s). There are 40 available forms to choose from. Select OK. Select the Preview button to view a PDF file of the selected CAESY presentation.

CAESY Printables at Walkout

| Patient | Service | Provider | Description | Tooth | Surface | Fee | Ins. | Discount | Patient Portion |
|------------------|---------|-------------------|--|-------|---------|---------|---------|----------|-----------------|
| Charles Abbot... | D1110 | Diane Martin, RDH | PROPHYLAXIS-ADULT | | | \$50.00 | \$50.00 | \$0.00 | \$0.00 |
| Charles Abbot... | D0120 | George Young, ... | PERIODIC ORAL EVALUATION | | | \$30.00 | \$30.00 | \$0.00 | \$0.00 |
| Charles Abbot... | D0274 | Diane Martin, RDH | BITEWINGS-FOUR FILMS | | | \$45.00 | \$45.00 | \$0.00 | \$0.00 |
| Charles Abbot... | D1204 | Diane Martin, RDH | TOPICAL AP. OF FLUORIDE (EX. PROPHY)-ADT | | | \$25.00 | \$25.00 | \$0.00 | \$0.00 |
| Charles Abbot... | | George Young, ... | | | | \$0.00 | \$0.00 | \$0.00 | \$0.00 |

\$150.00

\$150.00

\$0.00

\$0.00

Add ServiceAdd Tx ItemAdd PaymentAdd AdjustmentEdit ServiceDelete ServiceShow Estimation

Primary: Great-West Life InsuranceSecondary: Harrington Benefits Services

Rem Deduct: \$0.00This Walkout: \$125.00Rem Deduct: \$0.00This Walkout: \$25.00

Benefits Remaining: \$528.00Prev. Outstand: \$2,081.00Benefits Remaining: \$355.00Prev. Outstand: \$986.20

Recall/AppointmentPrinter OptionsPrint Walkout StatementQuick Walkout

Show Preview of CAESY Printables

AccountWalkoutAccount PaymentInsurance PaymentAdjustment

SaveClearClose

Tax: \$0.00Total: \$0.00This Walkout: \$0.00Total Due: \$300.00

During the Walkout Process, select the checkbox '**Show Preview of CAESY Printables**' to preview the Printables prior to printing. If three Printables are attached to a service code but you only need one, print that one and cancel out of the rest.

Below is a listing of all available **CAESY Printables** with recommendations for service codes to attach them to.

| CAESY Printable | Service Code Recommendation |
|-------------------------------|---|
| Caring for your Denture | D5110 D5120 D5130 D5211 D5212 D5213 D5214 D5225 D5226 D5281 D5140 |
| Homecare – Esthetics | D2330 D2331 D2332 D2335 D2960 D2961 D2962 |
| Caring for your Bridge | D6740 D6750 D6751 D6752 D6780 D6782 D6783 D2790 D6791 D6792 |
| Homecare – Amalgam Fillings | D2140 D2150 D2160 D2161 |
| Homecare –Temporary Bridges | D6253 D6793 |
| Homecare – Permanent Crowns | D2720 D2721 D2722 D2740 D2750 D2751 D2752 D2790 D2791 D2792 D2794 D2780 D2781 D2782 D2783 D2710 D2712 |
| Homecare – Root Canal Therapy | D3310 D3320 D3330 D3346 D3347 D3348 |
| Homecare – Resin Fillings | D2330 D2331 D3332 D2335 D2391 D2392 D2393 D2394 D2650 D2651 D2652 D2662 D2663 D2664 |

| | |
|--|---|
| Homecare – Permanent Bridges | D6740 D6750 D6751 D6752 D6780 D6781 D6782 D6783 D6790 D6791 D6792 |
| Post-Op Inst. Extractions | D7111 D7140 D7210 D7220 D7230 D7240 D7241 D7250 |
| Homecare – Permanent Indirect Restorations | D2510 D2420 D2530 D2542 D2543 D2544 D2610 D2620 D2630 D2642 D2643 D2644 D2650 D2651 D2652 D2662 D2663 D2664 |
| Homecare – After Implant | D6010 D6012 D6040 D6050 |
| At Home Whitening | D9972 |
| Homecare – SRP | D4341 D4342 |
| Homecare – Implant Fixed Restoration | D6065 D6066 D6067 |
| Homecare – Perio Surgery | D4210 D4211 D4230 D4231 D4240 D4241 D4245 D4249 D4260 D4261 D4263 D4264 |
| Importance of Regular Exams | D0120 D0150 D0180 D0140 D0145 D0160 D0170 |
| Superfloss and Floss Threaders | D6740 D6750 D6751 D6752 D6780 D6781 D6782 D6783 D6790 D6791 D6792 D8010 D8020 D8030 D8040 D8050 D8060 D8070 D8080 D8090 |
| Softdrinks and Your Health | D1310 |
| Sealants | D1351 |
| Smokeless Tobacco | D1320 |
| Brushing | D1330 |
| Homecare for Periodontal Disease | D4341 D4342 |
| Flossing | D1330 |
| Fluoride | D1203 D1204 D1206 |
| Nutrition and Health | D1310 |
| Ultrasonic Scaling | D4355 D4341 D4342 |
| Homecare – Implant Removable Restoration | D6053 D6054 |
| Homecare –Temporary Crowns | D2799 |
| Bruxism | D9940 |

SnapShot: FAQ # 14704

In an ever-growing practice, New Patient numbers and Current Patient Retention are built on the Patients' trust with your team. Having ongoing "Team Meetings" and evaluating the practice growth with all team members participating helps to motivate and grow the Practice! By looking at a trend of how the office is producing and collecting, as well as a comparison with the same month a year prior, can help to plan steps to improve and build your Practice Lifestyle. **SnapShot**, one of our Practice Management features, has the ability to show a trend of Production/Collection, as well as a comparison with the same month last year.

Has the doctor ever walked up and asked you where we are at today with production and collection – Snapshot does it again!

You can very easily see current month's production/collection numbers in Snapshot, as well as other current totals.

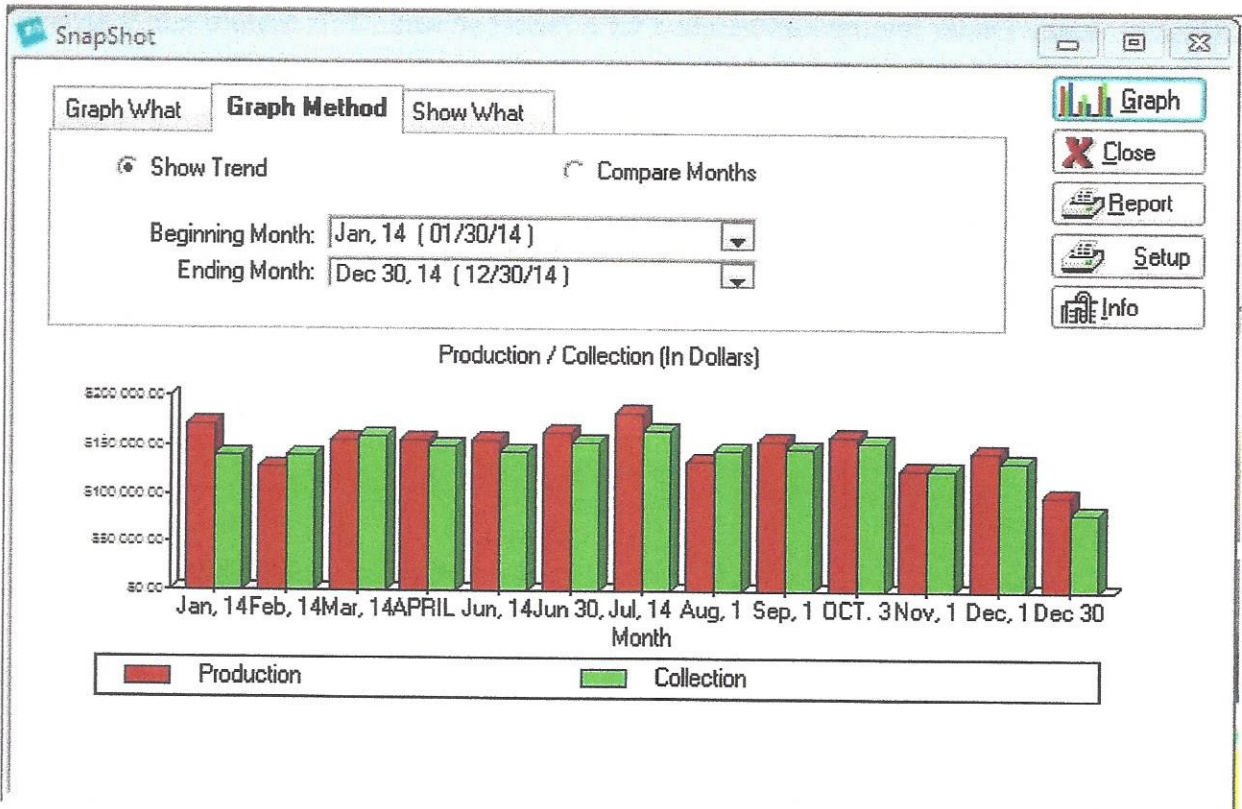
The screenshot shows the SnapShot application window. It has tabs for 'Graph What', 'Graph Method', and 'Show What'. Under 'Graph Method', there are radio buttons for 'Show Trend' and 'Compare Months'. Below these are dropdown menus for 'Beginning Month' (Feb, 14 (02/07/14)) and 'Ending Month' (Dec, 14 (12/17/14)). On the right side, there are buttons for 'Graph', 'Close', 'Report', 'Setup', and 'Info'. The main area displays two tables: 'Accounts Receivable' and 'Production / Collection:'. To the right of these tables, the text 'Totals This Month' is displayed.

| Accounts Receivable | | Production / Collection: | |
|---------------------|--------------|--------------------------|-------------|
| Current: | \$73,787.75 | Production: | \$10,160.30 |
| 30 Days: | \$1.44 | Collections: | \$1,923.36 |
| 60 Days: | \$4,294.96 | Collection Ratio: | 18.93% |
| 90 Days: | \$34,523.47 | Adjustments: | \$98.03 |
| Contract: | \$6,276.64 | | |
| Total A.R.: | \$118,884.26 | Patient Production: | |
| Insurance: | \$78,186.78 | Patient Visits: | 37 |
| Due Now: | \$40,697.48 | New Persons: | 0 |
| | | Production Per Visit: | \$274.60 |
| | | Payments Per Visit: | \$51.98 |

Totals This Month

Let's take a look at this practice's production and collection trends by using Eaglesoft's SnapShot feature. The Snapshot tool is a great way to see how your practice is doing at any time during the month and to create graphs to show trends or compare months. SIMPLE, DYNAMIC, AND PAPERLESS!

We can easily see how we did to goal over the course of last year. What is your practice's goal? What does your Snapshot graph look like?



Tracking New Patients

Utilize Eaglesoft to process reports that will show your New Patients seen for a certain time frame. You can process the Patient Master Report, filtering the patient filter window with the **“First Visit Date”** filled in with the criteria needed.

Patient Master Report Filter

Patient Filter

Search by Person
☐ ID From: _____
☒ Name To: _____

Types of People
City: (All Cities)
Marked As: (All People)
Preferred Dentist: (All Dentists)
Preferred Hygienist: (All Hygienists)
Email Address: All
Insurance Status: All

Status: ☒ Active ☐ Inactive

Preview Report
Cancel

From To

Age Range: _____
Birthday Range: _____
Date Entered: 00/00/0000 00/00/0000
First Visit Date: 05/01/2018 05/31/2018
Last Visit Date: 00/00/0000 00/00/0000
Next Prev. Appt.: 00/00/0000 00/00/0000
Next Reg. Appt.: 00/00/0000 00/00/0000

Eaglesoft’s Money Finder feature can be used for a report as well. This feature can then be used to pull in patients who have had a completed service of D0150; Comprehensive Examination to see how many of the practice’s “New Patients” actually had a Comprehensive Examination during that timeframe.

Money Finder

Categories: (Custom)

NRA: NPA:

☒ Scheduled & Unscheduled

☐ Patients Not Scheduled

☐ Patients Scheduled

Select Only Patients Who:

☐ Are On Short Notice

☐ Deductible Does Not Apply To Prev.

☐ Have Cancelled Or Failed Appointments

Have Appt Time Preference: All

Have Insurance Status Of: All

Have Preferred Dentist Of: (All Providers)

Recall Note Includes:

Primary Benefits: .00 .00

Prim. Ded. Remaining: .00 .00

Secondary Benefits: .00 .00

Sec. Ded. Remaining: .00 .00

Next Prev. Appt.: 00/00/0000 00/00/0000

Next Reg. Appt.: 00/00/0000 00/00/0000

Next Recall Date: 00/00/0000 00/00/0000

Last Visit Date: 00/00/0000 00/00/0000

First Visit Date: 05/01/2018 05/31/2018

Age:

OK

Cancel

Include Patients That Match The Following:

| Has Or Lacks Info | Code | Description | From | To | &/Or |
|-------------------------|-------|-------------------------------|------------|------------|------|
| Has A Completed Service | D0150 | COMPREHENSIVE DRAL EVALUATION | 05/01/2018 | 05/31/2018 | |

| THE MONEY FINDER PROSPECT LIST | | | | | | | | | |
|----------------------------------|----------------|----------------|-----------------|------------------|-------------|----------|----------------------|--------------------|--|
| New Patients with D0150 May 2018 | | | | | | | | | |
| Patient | Home Phone | Work Phone | Next Reg. Appt. | Next Prev. Appt. | Next Recall | Prim/Sec | Remaining Deductible | Benefits Remaining | |
| 155 Baker, Sean | (555) 555-5555 | (999) 999-9999 | | | | Prim | \$50.00 | \$932.00 | |
| 167 James, Toni | (555) 555-5555 | (999) 999-9999 | | | 11/11/2018 | None | \$0.00 | \$0.00 | |
| 101 Johnson, Jason H | (555) 555-5555 | (999) 999-9999 | | | 11/11/2018 | Prim | \$0.00 | \$765.00 | |
| 172 Pearson, Aaron | (555) 555-5555 | (999) 999-9999 | | | 11/16/2018 | None | \$0.00 | \$0.00 | |
| 177 Samuels, Timothy | (555) 555-5555 | (999) 999-9999 | | | 11/11/2018 | Prim | \$50.00 | \$1,765.00 | |
| Total People: | | | 5 | | | | | | |

Review your Service and Provider Reports for the month to see the Examinations (Periodic and Comprehensive should your practice perform Prophies with Comprehensive Exams) and Prophies that were performed, in order to calculate the % of “Healthy patients in your practice.” The National Average for “Healthy Patients in a Practice” is 83% of your practice.

- Number of “Exams” (D0120 and D0150) = 150
- Number of Prophies (D1110) = 135
- % of Healthy Patients = 90%

Your practice can utilize the Service History report for each procedure, or use the Procedures by Provider report and see, by a specific provider, the procedures that were performed for the month. Your practice can also utilize the Service Code or Service Type Productivity reports found under the **Services Tab** of Reports.

Note: With your productivity reports, remember these require processing prior to running your End of Month, as the totals change for each month.

The screenshot shows the 'Report Listing' window with the 'Services' tab selected. The 'Reports' list includes: Service Codes By Fee Schedule, Service Codes By Standard Fee, Service Codes By Type, Service Codes Master, Service Codes Productivity Master, Service History, Service Type Productivity - Detailed, Service Type Productivity - General, and Service Types Master. The 'Service Codes Productivity Master' and 'Service Type Productivity - Detailed' reports are highlighted with red boxes. The 'Description of Report' section below states: 'Shows a master listing of coverage books.'

The screenshot shows the 'Service Codes Filter' window. The 'Search By Service' section has three radio buttons: 'Service Code', 'ADA Code', and 'Description'. The 'Service Code' option is selected. The 'Service Code Information' section includes a 'Service Type' dropdown, 'Status' (Active and Inactive), 'Taxation' (Tax Applies and Tax Does Not Apply), 'Discounts' (Discounts Apply and Discounts Do Not Apply), and 'Insurance' (Submitted On Insurance and Not Submitted). The 'Ranges' section includes 'Standard Fee', 'Time Units', and 'Last Changed' (00/00/0000 to 00/00/0000). The 'Productivity' section includes 'MTD Units', 'MTD Revenue', 'YTD Units', and 'YTD Revenue'. The 'OK', 'Cancel', and 'Print Filter' buttons are on the right.

| | | | | | | | | | | |
|---|---------------------|-----------------|----------------------------|--------------------|--------------------|-------------------|-------------------|------------------|-------------------|--|
| TIME 8:23 AM | | | PTC & Associates | | | | DATE 2/10/2015 | | | |
| <u>SERVICE TYPE PRODUCTIVITY - DETAILED</u> | | | | | | | | | | |
| <u>Service Type</u> | <u>Service Code</u> | <u>ADA Code</u> | <u>Description</u> | <u>Current Fee</u> | <u>YTD Avg Fee</u> | <u>This Month</u> | | <u>This Year</u> | | |
| | | | | | | <u>Units</u> | <u>Production</u> | <u>Units</u> | <u>Production</u> | |
| DIAGNOSTIC | | | | | | | | | | |
| | D0150 | D0150 | .COMPREHENSIVE ORAL EVALUA | \$80.00 | \$80.00 | 2 | \$120.00 | 2 | \$120.00 | |
| | D0120 | D0120 | .PERIODIC ORAL EVALUATION | \$53.00 | \$50.53 | 19 | \$960.00 | 19 | \$960.00 | |
| | | | DIAGNOSTIC TOTAL | | | 21 | \$1,080.00 | 21 | \$1,080.00 | |
| PREVENTIVE | | | | | | | | | | |
| | D1110 | D1110 | .PROPHYLAXIS-ADULT | \$105.00 | \$100.80 | 25 | \$2,520.00 | 25 | \$2,520.00 | |
| | D1120 | D1120 | .PROPHYLAXIS-CHILD | \$47.00 | | 0 | \$0.00 | 0 | \$0.00 | |
| | | | PREVENTIVE TOTAL | | | 25 | \$2,520.00 | 25 | \$2,520.00 | |
| | | | >>>>>>>>> TOTAL: | | | 46 | \$3,600.00 | 46 | \$3,600.00 | |

The path in which your Practice is headed is a key factor with tracking the “health” of your business and how to continue at the correct path, or evaluate and make a change.

Review your **Hygiene Recare**. Looking at your Recall Wizard and evaluating the Overdue Hygiene reports that can be generated by Eaglesoft, can assist with tracking your practice Hygiene Retention.

Use these crucial reports for re-activating your Hygiene patients. Store your team communication within Eaglesoft’s special feature, In Contact, and track how the patient was communicated by either a phone call or letter.

Eaglesoft InContact

| Patient | Entered | Type | Modified | Description | Status |
|-------------------|------------|--------|------------|----------------------|--------------|
| Abernathy, Betsy | 11/12/2013 | Recall | 11/12/2013 | Overdue October 2013 | Left Message |
| Brown, Andrea | 11/12/2013 | Recall | 11/12/2013 | Overdue October 2013 | Left Message |
| Brown, Bruce | 11/12/2013 | Recall | 11/12/2013 | Overdue October 2013 | Unscheduled |
| Carson, Ginger B. | 11/12/2013 | Recall | 11/12/2013 | Overdue October 2013 | Scheduled |
| Clark, Marie M. | 11/12/2013 | Recall | 11/12/2013 | Overdue October 2013 | Left Message |

Add

Delete

Del. All

Filter

Note

Clark, Marie M. Anytown, IL 99999

Patient Info: **Clark, Marie M.**

Prof. Dent: George Young, DDS
Prof. Hyg: Debra Davis, RDH
H Phone: (555)

Acct. Info: 188

Status: Active
Resp Party: Marie M. Clark
Current: \$0.00

InContact Type Summary:

Delinquent Accts: 19
Recalls: 5

Electronic communication, as well as your team communication, can aid in placing importance to ongoing Dental Recare.

RECALLS

[◀ Back to Communications List](#)

The language is currently

1997

Save & Exit

RECALL CAMPAIGN OVERVIEW

Here is a quick glance at your current Recall Campaign settings.

Diagram illustrating the sequence of attempts and recall date:

- Attempt 1** (45 days before) → **Attempt 2** (14 days before) → **Recall Date** → **Attempt 3** (1 day after) → **Attempt 4** (30 days after) → **Attempt 5** (60 days after)

ATTEMPT 1

Activate this attempt?

YES

Preview

Email

SETTINGS

Schedule
45 Day(s) before the recall date

Delivery Method
Email

Est. 2000



Key Practice Reports: See FAQ # 13796 (This is a great FAQ # to assist you in finding the Optimal Eaglesoft Report)

Your Team should be processing certain reports on a Daily, Weekly and Monthly basis to ensure efficiency and accuracy in your practice.

Monitoring and tracking provider productivity is very important. For offices with multiple providers, provider productivity is a critical component. Review provider productivity on a regular basis, as well as understand what the totals actually reflect in the reports that Eaglesoft generates.

Daily

From Eaglesoft, generate Production, Collections and Adjustments reports, as well as a summary of the Day's Totals. The summary report, your Day Sheet, shows all totals by type, divided into production, collections and adjustments, their impact on your accounts receivable and a running A/R total. This report shows a lower section with how many patients were seen, a collection ratio for that day (payments made during a walkout), a collection ratio comparing collections to production, and an average production and collection per visit. This is a good summary report of the day's transactions to review.

| DAY SHEET | | | | |
|--|---------------|--------------------------------|----------------------------|----------------------------|
| From EOD: Nov 18, 14 (11/18/14) To EOD: Nov 18, 14 (11/18/14) | | | | |
| Type | Production | Collections | Adjustments | A/R Impact |
| Services: | \$43,426.00 | --- | --- | \$43,426.00 |
| Deleted Services: | \$0.00 | --- | --- | \$0.00 |
| Taxes: | \$0.00 | --- | --- | \$0.00 |
| Deleted Taxes: | \$0.00 | --- | --- | \$0.00 |
| Discounts: | \$0.00 | --- | --- | \$0.00 |
| Deleted Discounts: | \$0.00 | --- | --- | \$0.00 |
| Returned Checks: | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Returned Check Service Charges: | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Debit Adjustments: | \$0.00 | \$0.00 | \$43.18 | \$43.18 |
| Finance Charges: | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Billing Charge: | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Deleted Debits: | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Cash Payments: | --- | \$0.00 | --- | \$0.00 |
| Check Payments: | --- | \$13,297.00 | --- | (\$13,297.00) |
| Other Payments: | --- | \$16,524.00 | --- | (\$16,524.00) |
| Credit Adjustments: | (\$20.00) | \$0.00 | \$0.00 | (\$20.00) |
| Deleted Credits: | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Write Offs: | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Totals: | \$43,436.00 | \$29,821.00 | \$43.18 | |
| | | | | Beginning A/R \$104,924.53 |
| | | | | Change in A/R \$13,656.18 |
| | | | | Ending A/R \$118,582.71 |
| System Summary For Activity From EOD: Nov 18, 14 (11/18/14) To EOD: Nov 18, 14 (11/18/14) | | | | |
| Total Payments: | \$29,821.00 | Less Trans Fmts: \$29,821.00* | Total Production: | \$43,436.00 |
| Total Walkouts: | \$43,400.00** | Less Est. Ins: \$34,635.25**** | Total Collection: | \$29,821.00 |
| Payments Made On Walkout: | | | Ion Rati: | 68.66% |
| Walkout Collection Rati: | 68.14%*** | 82.75%***** | | |
| Patients Seen: | 18 | | Patients Seen: | 18 |
| Total Production: | \$43,436.00 | | Total Collection: | \$29,821.00 |
| Avg. Production Per Visit: | \$2,714.75 | | Avg. Collection Per Visit: | \$1,652.81 |
| * Total of Payments made today less those from prior days that were deleted & recreated today due to transferring patients with history. | | | | |
| ** Total of Services + Taxes - Discounts from the above totals less any service amounts that were both entered and deleted within this per | | | | |
| *** Total of Payments Made On Walkouts divided by Total Walkouts within this per | | | | |
| **** Total Walkouts less any estimated insurance calculated on those walkouts. This amount does not change when the claims these are on are cl | | | | |
| ***** Total of Payments Made On Walkouts divided by Total Walkouts less estimated insurance within this per | | | | |

Your practice should also process a Detailed Treatment Plans report to review how much treatment was diagnosed vs. how much was scheduled for any given date range that you are interested in. Review how much treatment diagnosed is scheduled for anytime period vs. what is diagnosed. This will aid in tracking your Case Acceptance rate on a daily basis.

Another option for your Detailed Treatment Plans report is to process this with only the "Post to Walkout" marked in the **Show Items** within the filter window. This will show all treatment that was posted to walkout during a chosen timeframe, which was not completed. Initially, your practice should look at this report for all dates, and then chose either daily or weekly to review. This process is important for the offices that utilize our Charting feature with their clinical team sending the services for today to the front office team through Eaglesoft.

Detailed Treatment Plans Filter

Provider: [All Providers]

Dates: [All Dates]

Range: 03/23/2015 To: 03/23/2015

Preview Report

Cancel

Show Items

☐ Accepted

☐ Completed

☐ Proposed

☒ Post To Walkout

☐ Rejected

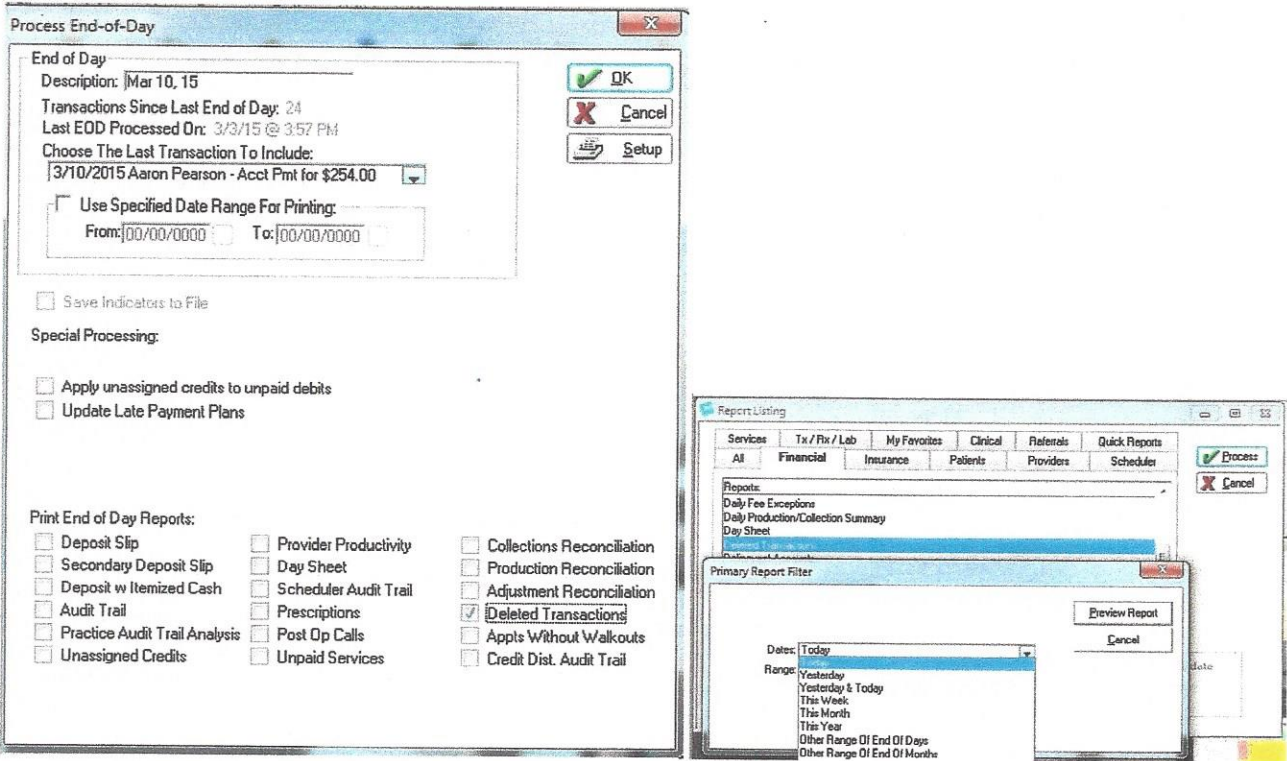
☐ Referred

☒ Include Services Attached to an Appt

☐ Show Inactives

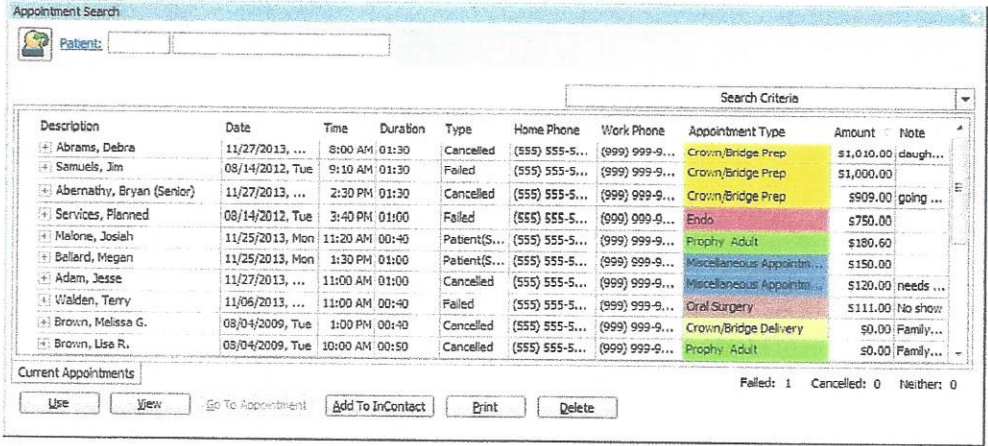
| DETAILED TREATMENT PLANS | | | | | | | | | |
|--------------------------|--|-----|------|---------|----------|--------------|------------|-----------------------------------|------------|
| Patient/App | Services | Th | Surf | Status | Provider | Date Planned | Date Comm. | Fee | |
| 192 - Black, Chad | D5750 CROWN-PORCELAIN FUSED TO HIGH NOBLE ME28 | | | Walkout | RKM | 2/19/2013 | | \$509.00 | |
| | D5240 PONTIC-PORCELAIN FUSED TO HIGH NOBLE ME30 | | | Walkout | RKM | 2/19/2013 | | \$509.00 | |
| | D5240 PONTIC-PORCELAIN FUSED TO HIGH NOBLE ME31 | | | Walkout | RKM | 2/19/2013 | | \$509.00 | |
| | D5750 CROWN-PORCELAIN FUSED TO HIGH NOBLE ME32 | | | Walkout | RKM | 2/19/2013 | | \$509.00 | |
| | Subtotal: | | | | | | | \$3,036.00 | |
| | | | | | | | | Total Proposed Posted to Walkout: | \$3,036.00 |
| | | | | | | | | Total Accepted: | \$0.00 |
| | | | | | | | | Total Completed: | \$0.00 |
| | | | | | | | | Total Referred: | \$0.00 |
| | | | | | | | | Total Plan: | \$3,036.00 |
| 204 - DOE, JANE | D2353 RESIN-BASED COMPOSITE-THREE SURF., POST 1E | MOD | | Walkout | GGY | 5/8/2014 | | \$138.00 | |
| | D0220 INTRAORAL-PERAPICAL FIRST FILM | | | Walkout | GGY | 5/8/2014 | | \$21.00 | |
| | | | | | | | | Subtotal: | \$159.00 |
| 03/03/2015 | D0150 COMPREHENSIVE ORAL EVALUATION | | | Walkout | GGY | 5/8/2014 | | \$60.00 | |
| 03/03/2015 | D1330 ORAL HYGIENE INSTRUCTION | | | Walkout | DFD | 5/8/2014 | | \$0.00 | |
| 03/03/2015 | PC Perio Charting | | | Walkout | DFD | 5/8/2014 | | \$0.00 | |
| 03/03/2015 | OCS Oral Cancer Screening | | | Walkout | DFD | 5/8/2014 | | \$0.00 | |
| 03/03/2015 | D1110 PROPHYLAXIS-ADULT | | | Walkout | DFD | 5/8/2014 | | \$105.00 | |
| | | | | | | | | Subtotal For This Appointment: | \$165.00 |
| | | | | | | | | Total Proposed Posted to Walkout: | \$324.00 |
| | | | | | | | | Total Accepted: | \$0.00 |
| | | | | | | | | Total Completed: | \$0.00 |
| | | | | | | | | Total Referred: | \$0.00 |
| | | | | | | | | Total Plan: | \$324.00 |

Another vital report to review and process daily is your practice's Deleted Transactions Report. This can be requested during the End of Day process, or by accessing the report under the Financial Tab.



Weekly

Process a report in Eaglesoft to show your Cancelled and Failed appointments, dollars related to these appointments and the types of appointments that were deleted. Your Quick Fill List can be a vital part of locating treatment that has been cancelled and not re-scheduled.



Utilize the **Search Criteria** to filter for Failed and Cancelled appointments with a specific date range. This report will show you types of appointments and the dollars related to these appointments, as well as the specific criteria of Failed OR Cancelled.

Search Criteria

Classification:

☐ Patient Appointment

☒ Cancelled

☐ Block

☐ Neither

☐ Unscheduled

☐ Family

☐ QuickFill Appointment

☐ Sooner If Possible

☒ Failed

Provider:

All Providers

Chair/Location:

All Chairs

Appt Type:

All Types

Date From:

00/00/0000

To:

00/00/0000

Duration From:

To:

Amount From:

To:

Confirmation:

☐ Unconfirmed

☐ No Answer

☐ Confirmed

☐ Phone Busy

☐ Sent Email

☐ Waiting For Callback

☐ Left Message

☐ Other

AM/PM:

☐ Prefers AM

☐ Prefers PM

☐ Any

☐ Patients On Short Notice

☐ Include Family Members

Apply

| APPOINTMENT SUMMARY | | | | | | | |
|---|---|-----------|---------|----------|----------------|--------------------------------|------------|
| Patient | Provider | Date | Time | Duration | Chair/Location | Type | Amount |
| 5 - Alexander, Scott H: (555) 555-5555 W: (999) 999-9999 | Young, DDS, George | 12/5/2013 | 1:30 PM | 00:30 | None | Emergency | \$65.00 |
| Note: Patient web when available to come in. | | | | | | Reason for Deletion: Cancelled | |
| 168 - Samuels, Jim H: (555) 555-5555 W: (999) 999-9999 | Davis, RDH, Debra Young, DDS, George | 8/14/2012 | 9:10 AM | 01:30 | None | Crown/Bridge Prep | \$1,000.00 |
| Note: | | | | | | Reason for Deletion: Failed | |
| 171 - Services, Planned H: (555) 555-5555 W: (999) 999-9999 | Young, DDS, George | 8/14/2012 | 3:40 PM | 01:00 | None | Endo | \$750.00 |
| Note: | | | | | | Reason for Deletion: Failed | |

Monthly

1. For Insurance Tracking, process your:
 - Outstanding Insurance Claims by Aging report. This report will show the insurance companies and all of the patients with open claims. This is a great report for your team to use and with one phone call will take care of multiple outstanding claims on different patients. At the bottom of this report you will see the aging of the claims and the dollar amount outstanding for each aging category. This is very helpful to see the amount of Insurance Claims over 60 and 90 days.
 - Insurance Company Productivity Report. This will show month-to-date and year-to-date totals of claims and amounts submitted and received under currently assigned Insurance Companies. This report requires processing prior to running your End of Month, as the totals change for each month.
 - If your practice participates in Insurance Plans (PPO) and an adjustment is taken from your office fee at the time of the Insurance Payment, run your Adjustments by Type report and be sure to have specific adjustment types for each plan. If your practice utilizes Fee Schedules, you can process the Managed Care Analysis Report, which will show what is adjusted off at the time of walkout. Whichever method is used in your practice, be sure to track this monthly to see your write offs per plan.
2. Service Productivity Reports will show your practice production by service category and coding. This report will show how many were charged out for the month/year, this year average fee and their productivity total for the current month and year. Examples are:
 - Service Type Productivity – General
 - Service Type Productivity – Detailed
3. Review your Provider Productivity Reports to view the procedures that were performed by the specific providers, as well as the production totals. Some examples would be:
 - Provider Productivity: A summary of provider productivity for that month, including production, collection, and adjustments, also for Month to Date and Year to Date. Also included are number of patients seen and average per visit for each provider
 - Procedures By Provider
4. Your Detailed Treatment Plans report should be reviewed monthly if this task is not performed on a daily or weekly basis.
5. Referral reports will aid in tracking how your new patients were referred to your practice. Review these reports on a monthly basis. Referral Productivity- Detailed and Summary and Top Referral Sources. Patients Currently Referred Out will give your office detail on patients that have been referred out to a Specialty Practice that may not have returned to complete treatment. This report draws from the Edit Patient screen and the Referrals Button: Referred Out

| PATIENTS CURRENTLY REFERRED OUT | | | |
|--|-----------|--------------------|--------------------|
| This Month | | | |
| Patient | Date | Referred | Expected Return |
| 19 Abbott, Madison G | 3/4/2015 | Smith, DDS, Ronald | 4/1/2015 |
| Referral for 3rd molar surgical extractions | | | |
| 25 Walden, Terry | 3/12/2015 | Russell, DDS, Eric | 5/4/2015 |
| Perio referral for SRP and possible surgery LL | | | |

| REFERRAL PRODUCTIVITY - DETAILED | | | | | | |
|---|-------|--|-------------|-------------|------------|-------------|
| This Year With A First Visit On Or After Jan 01, 1900 | | | | | | |
| Referral Source | Type | Patient | First Visit | For Range | This Month | This Year |
| Henderson, DDS, John | Other | Abbott, Charles L | 2/3/2004 | \$10,765.00 | \$9,130.00 | \$10,765.00 |
| | | | Totals: | \$10,765.00 | \$9,130.00 | \$10,765.00 |
| Monthly Mailer | Other | Carson, Ginger B | 4/16/2008 | \$5,600.00 | \$1,900.00 | \$5,600.00 |
| | | | Totals: | \$5,600.00 | \$1,900.00 | \$5,600.00 |
| Myers, MD, Marcy | Other | Abemathy, Betsy Abemathy, Bryan Abemathy, Mitchell | 2/25/2004 | \$4,630.00 | \$1,240.00 | \$4,630.00 |
| | | | 1/7/2004 | \$890.00 | \$220.00 | \$890.00 |
| | | | 1/7/2004 | \$1,007.00 | (\$3.00) | \$1,007.00 |
| | | | Totals: | \$6,527.00 | \$1,457.00 | \$6,527.00 |
| Pink Pages, | Other | Abbott, Madison G Partridge, Eugene Partridge, Karen Partridge, Sammy Partridge, Tom | 1/7/2004 | \$879.00 | \$164.00 | \$879.00 |
| | | | 2/25/2004 | \$2,235.00 | \$1,735.00 | \$2,235.00 |
| | | | 12/23/2004 | \$1,710.00 | \$1,130.00 | \$1,710.00 |
| | | | 2/25/2004 | \$1,015.00 | \$0.00 | \$1,015.00 |
| | | | 12/23/2004 | \$260.00 | \$0.00 | \$260.00 |
| | | | Totals: | \$6,099.00 | \$3,029.00 | \$6,099.00 |
| Russell, DDS, Eric | Other | Allen, Jake | 2/12/2004 | \$405.00 | \$0.00 | \$405.00 |
| | | | Totals: | \$405.00 | \$0.00 | \$405.00 |

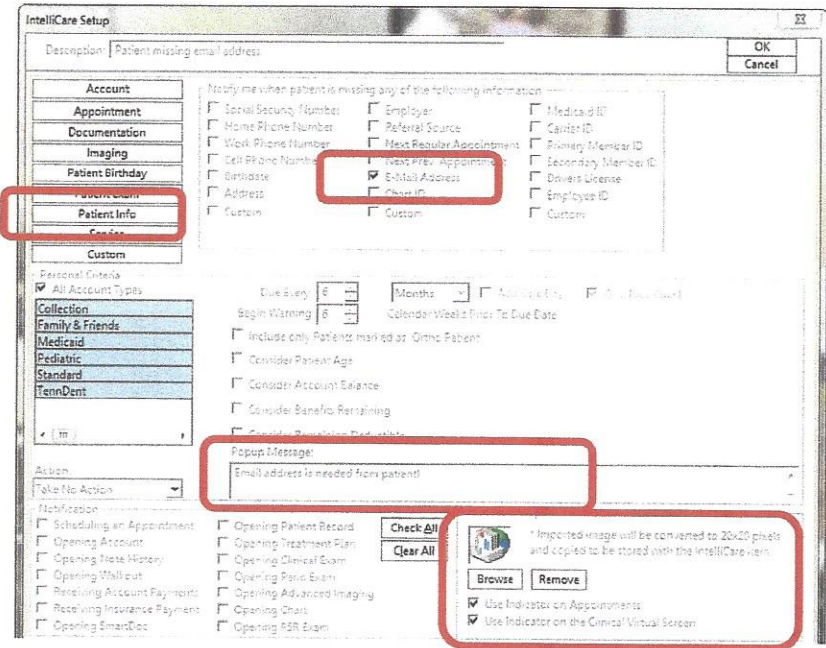
6. Your Patient Analysis Report should be reviewed and compared with previous months to track changes in your Practice numbers.

| Patient Analysis Report | | | | | |
|--------------------------------------|-------------|-------------|----------------------------------|-------------|-------------|
| Category: | # of Active | % of Active | Category: | # of Active | % of Active |
| Male: | 86 | 48.55% | Seen In Last 12 Months: | 62 | 35.03% |
| Female: | 91 | 51.41% | Seen In Last 24 Months: | 11 | 6.21% |
| | | | Seen In Last 36 Months: | 64 | 35.16% |
| Ages 0 - 9: | 2 | 1.13% | Seen More Than 36 Months Ago: | 25 | 14.12% |
| 10-19: | 7 | 3.95% | Patients w/out Last Visit Date: | 15 | 8.47% |
| 20-29: | 24 | 13.55% | New Patients Seen This Month: | 0 | 0.00% |
| 30-39: | 26 | 14.65% | New Patients Seen This Year: | 7 | 3.95% |
| 40-49: | 48 | 27.12% | Patients w/out First Visit Date: | 15 | 8.47% |
| 50-59: | 21 | 11.86% | | | |
| 60-69: | 4 | 2.26% | Future Recalls: | 46 | 27.68% |
| 70+: | 4 | 2.26% | Past Due Recalls: | 84 | 47.46% |
| Unknown: | 41 | 23.16% | Without Recalls: | 44 | 24.86% |
| Have Insurance: | 146 | 82.45% | Future Appointments: | 54 | 30.51% |
| Do Not Have Insurance: | 31 | 17.51% | Past Due Appointments: | 0 | 0.00% |
| | | | Without Appointments: | 123 | 69.49% |
| | | | | | |
| | | | Active: | 177 | |
| | | | Inactive: | 8 | |
| | | | Total Patients: | 185 | |
| | | | | | |
| Active Patients By Top Ten Zip Codes | | | | | |
| Zip Code: | City: | # | % | | |
| 99999 | Anytown | 177 | 100.00% | | |

IntelliCare Reminders: FAQ # 9482: Building Relationships with your patients

IntelliCare, what some of us refer to as “Intelligent” alerts, brings the efficiency and effectiveness of indicator icons, as well as reminder popup windows, if set, to many of the areas that a dental office wants reminders about regarding their patients and the care given to them. In a dental office, it’s all about your patients, the livelihood of your practice, and giving your patients the best experience possible when interacting with your office team.

The first step in creating an IntelliCare reminder is to access the feature under Lists/IntelliCare. Choosing the “New” option opens a window that gives different tabs containing specific criteria about your patients. You will see below, the set up for reminding your team to ask for a missing email address found under the Patient Info tab. I have circled the tab, as well as the criteria, the pop up message when hovering over the icon on the patient’s appointment and the area where the icon is added to the IntelliCare reminder.



Your office even has the ability to set these reminders specific to “Account types” and utilize the Patient Info tab for your Medicaid patients. Create an Account type for “Medicaid”, then check off missing Medicaid ID and this reminder will only look to your patients that have that specific Account type attached.

The Account tab can be used for account balances that have not had a payment in over 30 days. When the patient gives your front office team a payment, the reminder icon disappears, automatically! How simple and efficient is that!

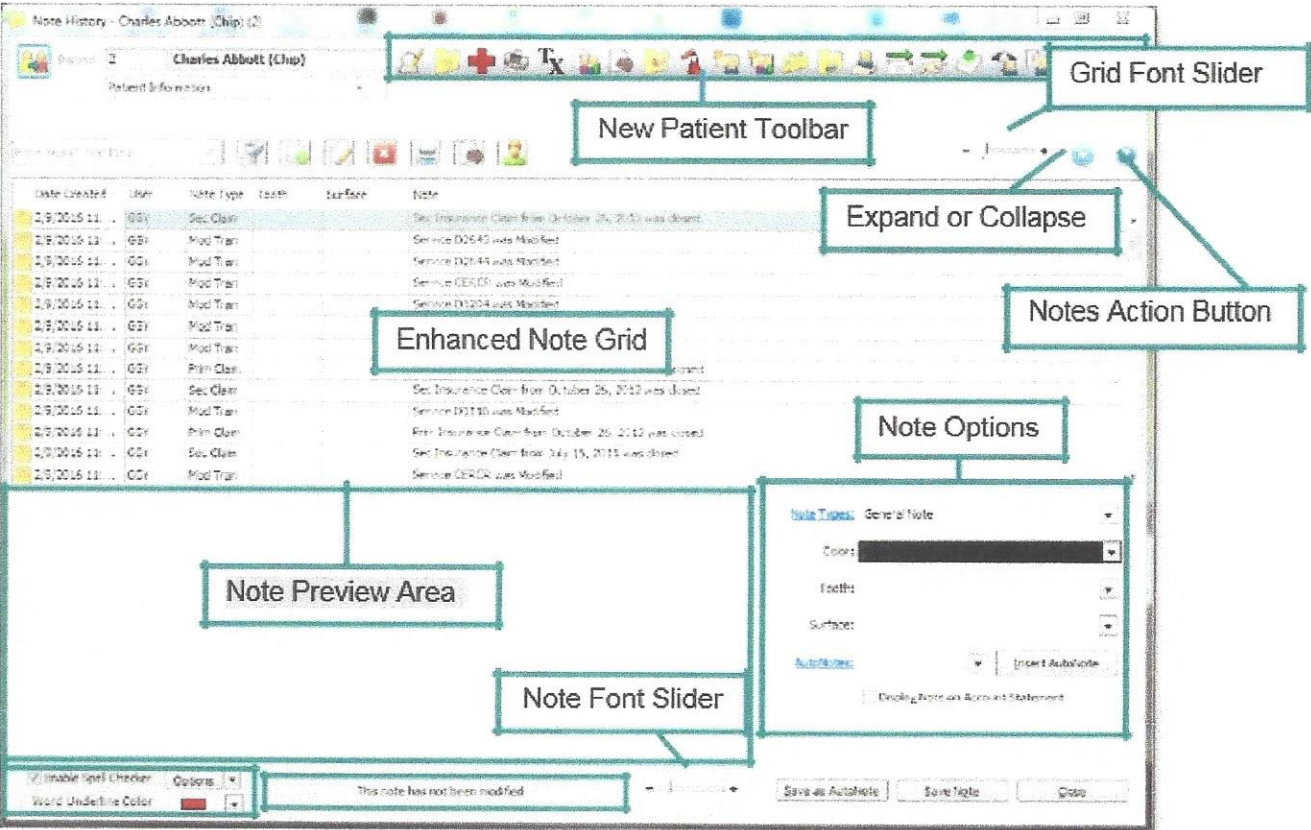
The next step is to be sure you add the IntelliCare reminders to your setup for your OnSchedule to view the indicator icons on your patients' appointments. This is found under the drop down menu on your OnSchedule: Tools/Setup Items. Once these reminder icons are

Eaglesoft 20: FAQ # 23400

Note History Update: FAQ # 35630

Enhancements have been made to Eaglesoft's Note History to make your notes more customizable and beneficial for your needs at your practice.

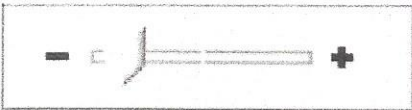
Introducing the New Notes History Command Center!



New Notes Buttons:



Note Grid Font Slider and Note Font Slider!

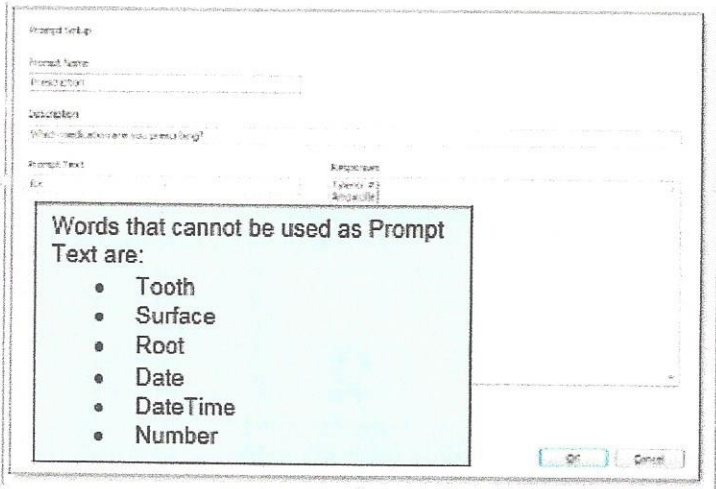


Select the **Grid Font Slider** to increase or decrease the size of the font in the Note Grid view.
Use the **Note Font Slider** to increase or decrease the size of the font in the Note Preview Area.

Introducing SmartNotes! FAQ # 35354

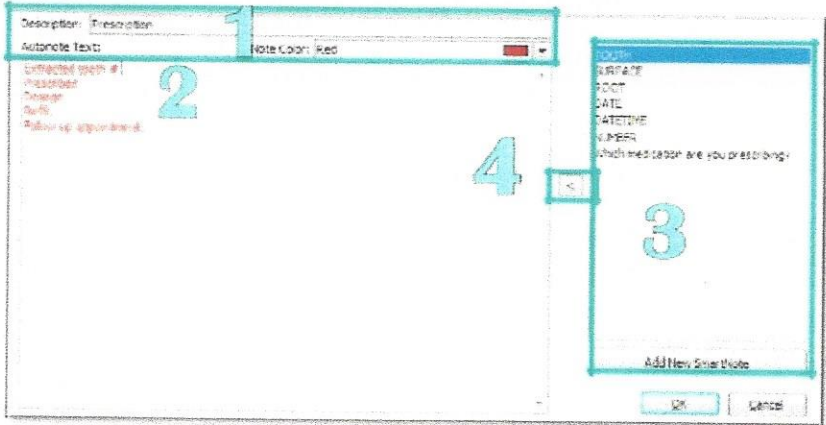
Our new feature, **SmartNotes**, allows you to create prompts to use within your AutoNote templates to allow for standardization of your documentation. Note: You must have security access to add/edit/delete SmartNotes.

Under **Lists/SmartNotes**, create your SmartNotes.



To create a new **SmartNote**, enter:
Prompt Name – The name of the SmartNote, for example: Prescription.
Description – The prompt indicator, for example: What medication are you prescribing?
Prompt Text – The note text that trigger the prompt, for example: RX.
Responses – The potential answers to the prompt, for example: Tylenol 3, Amoxicillin, etc.
Select **OK** to save.

Setting up your SmartNotes in AutoNotes

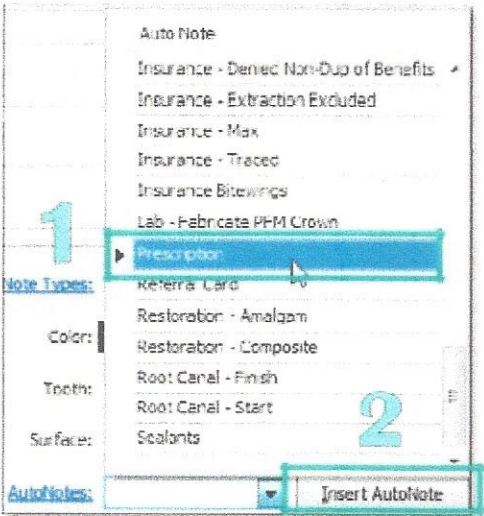


Access your AutoNotes under **Lists/AutoNotes**.
To edit an existing AutoNote, **select Edit**.
1. Enter the Description and select the Note Color that you would like the font to show up as.
2. Place the cursor where the desired prompt should be located.

- 3. Select and highlight the prompt from the panel on the right side of the screen.
- 4. Click the < button to add the prompt to the note.

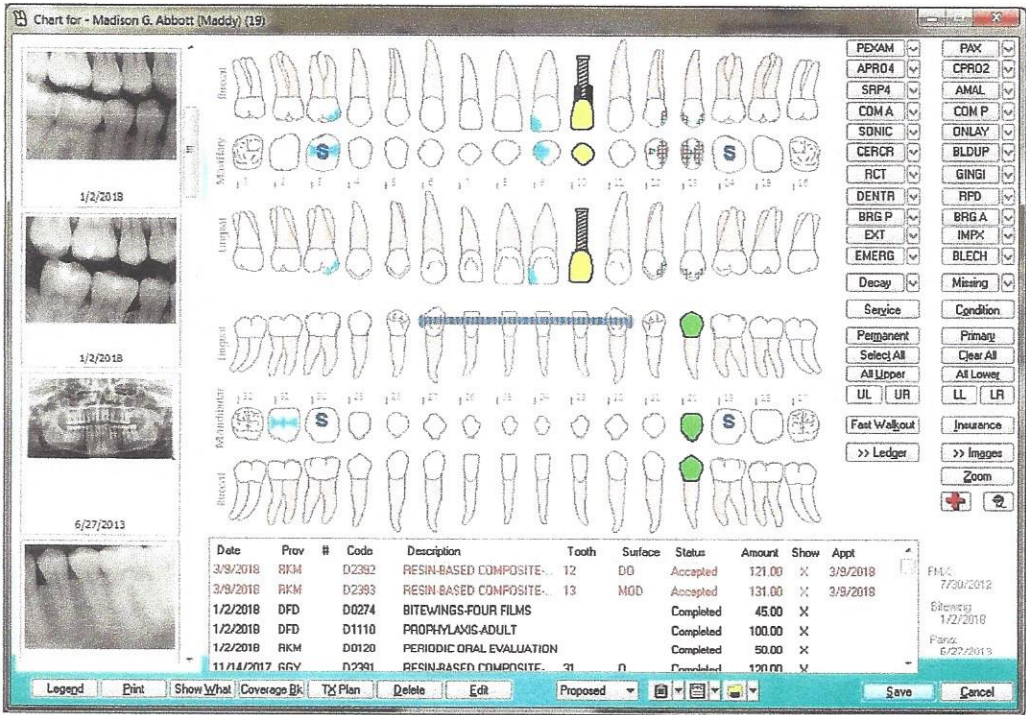
Select **OK** to save.

SmartNotes can currently be used in the **Note History** only. To use a SmartNote:



- 1. From the Note History Screen, select the desired AutoNote that includes SmartNote prompts.
- 2. Select Insert AutoNote.

A New Look for the Tooth Chart in ES20



Eaglesoft 21: FAQ # 22724/38969

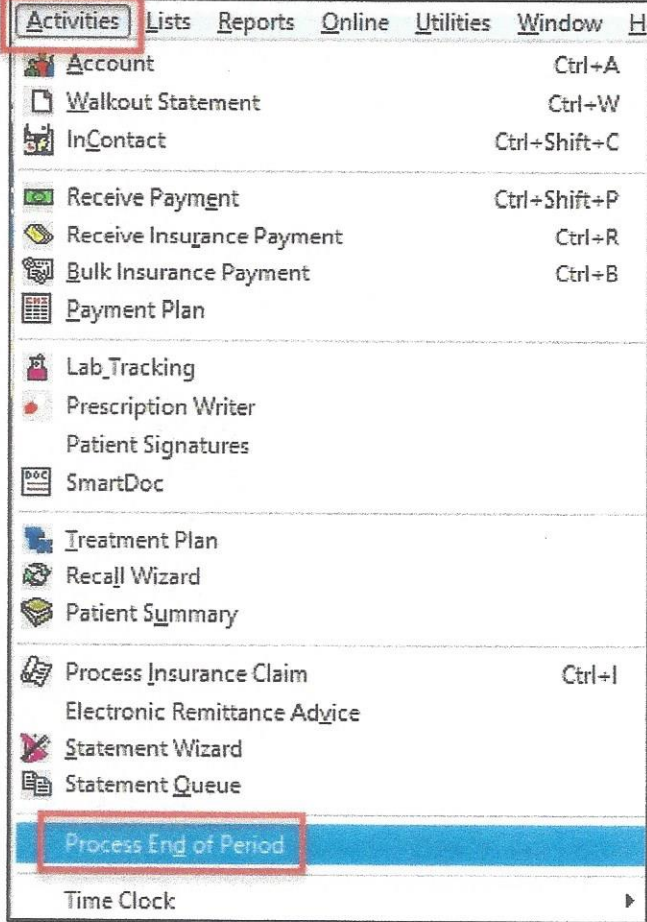
Automated End of Period Processing: FAQ # 38970

Automated End of Period processing eliminates the need for manual processing by a member of your team. It is convenient and can save you time!

For a scheduled End of Period (Day, Month, Year) to run successfully, set Windows Power Options on the Eaglesoft Server to never place the computer to sleep. For more, see [Changing Windows Power Options](#) – FAQ # 1378.

The **End of Period** process has been improved to include pre-scheduling features. The activities list for Eaglesoft 21 has changed to have all End of Period process activities combined into one: **End of Period**.

From the Practice Management Screen in Eaglesoft, go to **Activities | Process End of Period**



Before automated End of Period (Day, Month, Year) can be scheduled, **User Settings** and **End of Period Backup Location settings** should be configured.

Choose the **Settings** Tab | Expand **User Settings** | Set the **Primary User** and **Secondary User** | Set the **minutes** for the Primary and Secondary users to be **alerted prior to scheduled processing** | **Save User Settings**.

End of Period - Settings

Summary

End of Day

End of Month

End of Year

Settings

User Settings

Alert Settings

Primary User:

George Young, DDS

Secondary User:

David Baker

Alert Prior to Scheduled Processing

10

minutes

Note: For a user to be eligible to receive alerts, they must have Security access to Process EOD, EOM and EOY

Save User Settings

This provides the designated team members with an alert prior to beginning the scheduled **End of Period** process.

Note: Selected Alert Users must have security access to Process End of Year, Process End of Month, or Process End of Day to be usable. If they do not have access, a red X will appear, and user settings cannot be changed until this is corrected.

The next step would be to configure the **End of Period Backup Location settings**.

Eaglesoft will make a backup of the PattersonPM.db, PattersonPM.log, Eaglesoft.Server.Configuration.data, and keyfile.cfg files prior to a scheduled End of Period running.

This setting can only be set from the server machine in the office. Eaglesoft will also need to be ran as an admin to be able to set this location.

Note: While Eaglesoft is making a backup of these files, it is still highly recommended that you make your own backup that includes these files as well as the rest of the contents of your Data folder such as images and documents. For additional information, see [Data Backup Recommendations](#) - FAQ 206.

From the **Settings** Tab | Expand **System Settings** | Select the **End of Period Backup Location** | Select the number of backups to be stored (kept before the oldest autobackup is overwritten) | **Save Backup Settings**.

access to Process EOD, EOM and EOY

Settings

Save User Settings

System Settings

Backup Settings:

End of Period backup location:

C:\EagleSoft Autobackups\

Change Backup Location

Number of backups to store:

EOD 5 EOM 3 EOY 3

Save Backup Settings

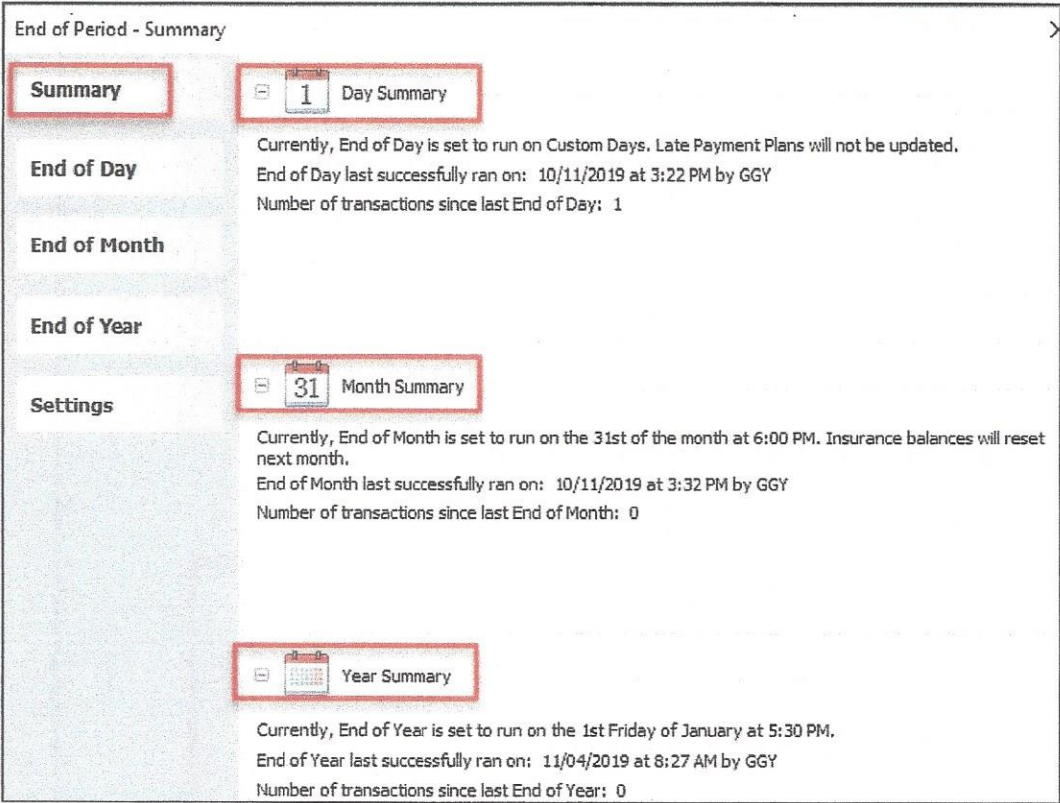
NOTE: All 3 values of the Number of backups to store cannot be 0. You must have 1 in at least 1 of the fields.

The default location for this is your Eaglesoft Autobackup location, yet this location can be changed by clicking the **Change Backup Location** button.

Validate that there is enough available space to accommodate the backup.

Once the **Settings** are configured, you can review the areas on the **End of Period Summary** tab.

Click the **Summary** tab on the left and view for End of Day, Month, and Year

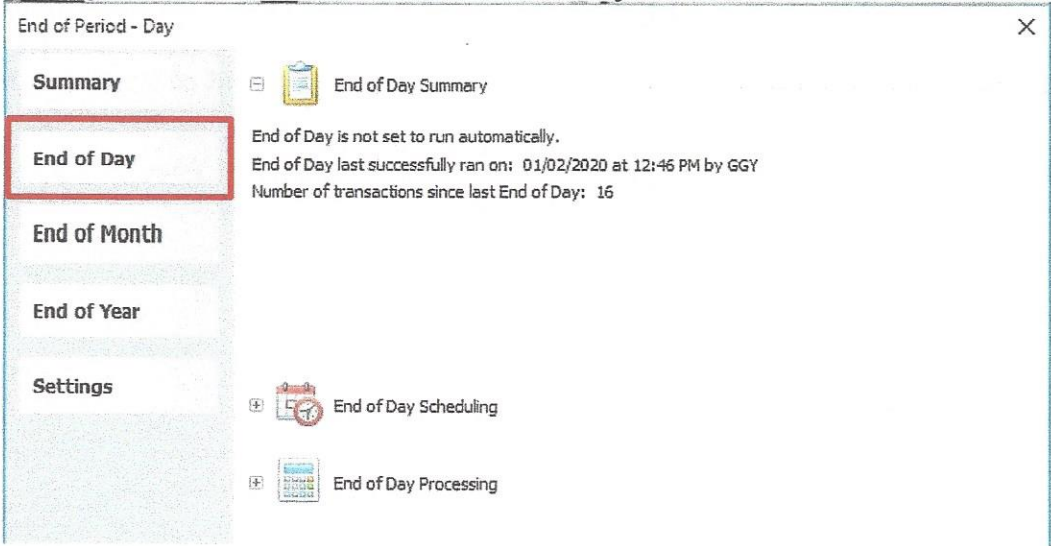


On the **Summary** tab, view details such as:

- ☐ **End of Period** schedule information
- ☐ Previous **End of Period** process date
- ☐ The number of transactions since the last time the **End of Day**, **End of Month** and **End of Year** were completed.

End of Day: FAQ # 9102


There are 3 significant areas found on the **End of Day** tab.



End of Day Summary: View a summary of information around the **End of Day Process**, including if, and when **End of Day** is scheduled to run, when **End of Day** was last successfully processed and the number of transactions in the system since the last **End of Day**.

End of Day Scheduling: Controls the scheduled **End of Day** processing. **End of Day** reports will not be printed or saved to the **Practice SmartDoc** during scheduled processing. **End of Day** reports can be found in the **Reports** listing. Scheduled **End of Day** processing will process all transactions available in the system when the scheduled time arrives.

*Note: As with a normal **End of Day**, at least one transaction must have been processed since the last **End of Day**, for the scheduled **End of Day** to process.*

End of Day Scheduling

Scheduled Only Preferences:

Choose When To Run

☒ Don't Schedule

☐ Every Weekday 5:00 PM

☐ Every Day 5:00 PM

☐ Customize Days

Sunday at: 5:00 PM

☐ Monday at: 5:00 PM

☐ Tuesday at: 5:00 PM

☐ Wednesday at: 5:00 PM

☐ Thursday at: 5:00 PM

☐ Friday at: 5:00 PM

☐ Saturday at: 5:00 PM


Update Late Payment Plans:

☐ Move overdue payment plan amounts from Payment Plans to Account Balances for plan payments overdue by more than 30 days.

Save Schedule

End of Day is not set to run automatically.

End of Day Processing: To process the **End of Day** manually, open the **End of Day Processing** section. **Run Manually** will open the **Process End-of-Day** window. This process is the same as in prior versions of Eaglesoft.

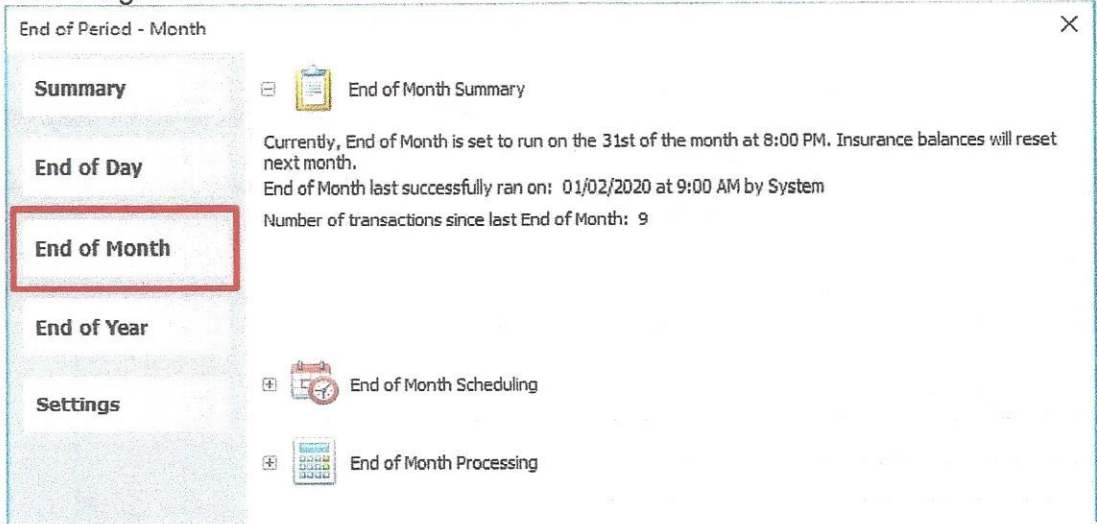
End of Day Processing

Manual Only Preferences:

Run Manually

End of Month: FAQ # 22253

There are 3 significant areas found on the **End of Month** tab.




End of Month Summary: View a summary of information around the **End of Month** Process including: If, and when **End of Month** is scheduled to process, when **End of Month** was last successfully processed and the number of transactions in the system since the last **End of Month**.

End of Month Scheduling: This section controls the scheduled **End of Month** processing. All **End of Month** reports will automatically save to the **Practice SmartDoc** when the scheduled **End of Month** is processed. Scheduled **End of Month** processing will not print reports. Scheduled **End of Month** will process all **End of Days** that are in the system when the scheduled time is reached.

*Note: As with a normal **End of Month**, at least one **End of Day** must have been processed since the last **End of Month**, for the scheduled **End of Month** to process.*

As always, all accounting work should be completed prior to End of Month running. For a scheduled **End of Month** to process, the database engine **must** be running. If the database is not running at the desired time for a scheduled **End of Month**, nothing will be processed. If the Server machine is asleep or powered off at the scheduled time, the scheduled **End of Month** will not process.



End of Month Scheduling

Scheduled Only Preferences:

☐ Don't Schedule

☒ On the

31

 day of the month

☐ On the

1

Day of Week

At:

8:00 PM

Reset Insurance Balances for Insurance Plans with an Anniversary:

☐ Don't reset


☐ In this month

☒ In next month

Save Schedule

Currently, End of Month is set to run on the 31st of the month at 8:00 PM. Insurance balances will reset next month.

End of Month Processing: This section allows for manual processing of the **End of Month**. Select the report(s) to print. **Note:** All **End of Month** reports will automatically save to the **Practice SmartDoc** when the **End of Month** is processed regardless of if they are selected to print. **Set Printer** to change the printer designated to print reports. **Run Manually** will run the **End of Month** process. This process is the same as in prior versions of Eaglesoft.



End of Month Processing

Manual Only Preferences:

Description:

Jan, 20

Choose the Last EOD to Include:

Jan 11, 20

☒ Reset Insurance Balances for Insurance Plans with an Anniversary Month between:

2

 and

2

Reports to Print Manually:

☒ Accounts Receivable Report

☒ Day Sheet

☒ Coverage Production

☒ Provider Productivity

☒ Referral Productivity - Detailed

* Please Note:

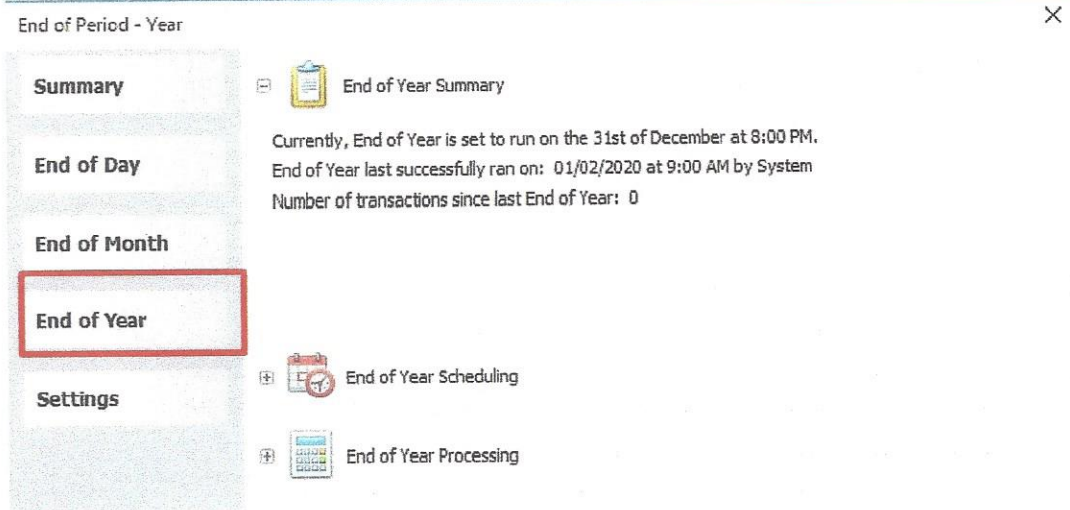
Please select the boxes for reports you would like to print. All listed reports will be placed in your Practice SmartDoc regardless of which boxes are selected to print.

Set Printer

Run Manually

End of Year: FAQ # 12437

There are 3 significant areas found on the **End of Year** tab.

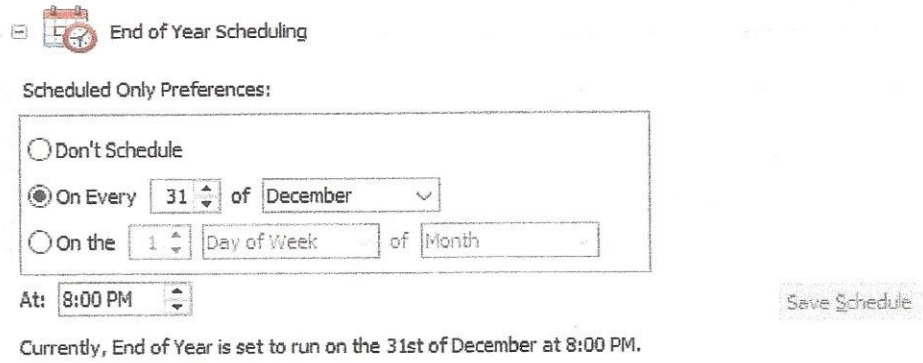


End of Year Summary: This section displays a summary of information around the **End of Year** Process including: If and when **End of Year** is scheduled to process, when **End of Year** was last successfully processed and the number of transactions in the system since the last **End of Year**.

End of Year Scheduling: This section controls the scheduled **End of Year** processing. All **End of Year** reports will automatically save to the **Practice SmartDoc** when the scheduled **End of Year** is processed. Scheduled **End of Year** processing will not print reports. Scheduled **End of Year** will process all **End of Months** that are in the system when the scheduled time is reached.

*Note: As with a normal **End of Year**, at least one **End of Month** must have been processed since the last **End of Year**, for the scheduled **End of Year** to process.*

As always, all accounting work should be completed prior to End of Year running. For a scheduled **End of Year** to process, the database engine **must** be running. If the database is not running at the desired time for a scheduled **End of Year**, nothing will be processed. If the Server machine is asleep or powered off at the scheduled time, the scheduled **End of Year** will not process.



End of Year Processing: This section allows for manual processing of the **End of Year**. Select the report(s) to print. **Note:** All **End of Year** reports will automatically save to the **Practice SmartDoc** when the **End of Year** is processed regardless of print status. **Set Printer** to change the printer designated to print reports. **Run Manually** will process the **End of Year**. This process is the same as in prior versions of Eaglesoft.

End of Year Processing

Manual Only Preferences:

Reports to Print Manually:

☒ Coverage Production

☒ Service Codes Productivity Master

☒ Provider Productivity

☒ Service Type Productivity - General

☒ Production By Account

☒ Service Type Productivity - Detailed

☒ Referral Productivity - Yearly Summary

* Please Note:

Please select the boxes for reports you would like to print. All listed reports will be placed in your Practice SmartDoc regardless of which boxes are selected to print.

Set Printer

Run Manually

System Activity Log for End of Period Process check:

As with previous versions of *Eaglesoft*, the **System Activity Log** (located in the **Utilities** menu) will document the success or failure of the **End of Period** process. **System Activity Log** entries for a Scheduled End of Period processing will end with an “S” to signify that it was a scheduled run, as opposed to manually processed. To verify that a scheduled End of Period has successfully processed, please check the **System Activity Log** after that scheduled process has completed.

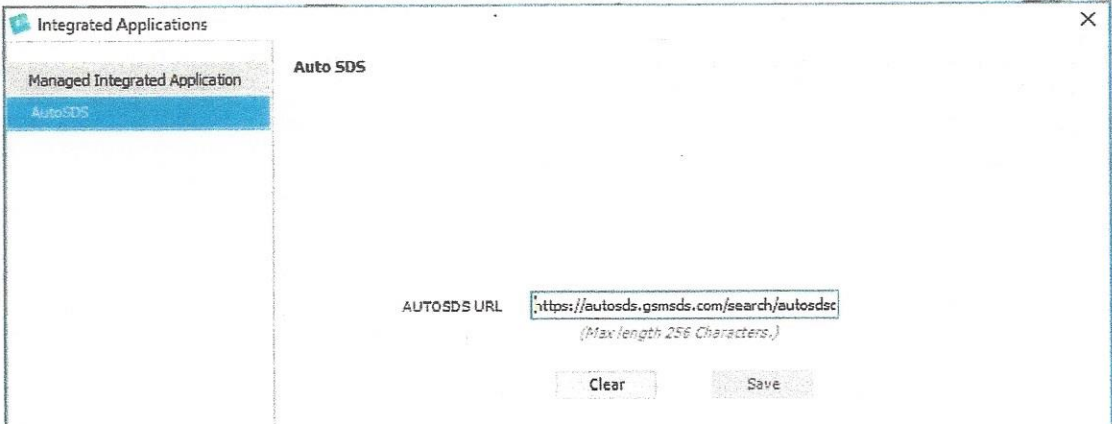
| System Activity Log | | | |
|---------------------|---------|--------|---|
| Show: All Types | | Report | Cancel |
| Date | Time | User | Description |
| Mar 12, 19 | 2:28 pm | | Processed Scheduled End of Day for 'Mar 12, 19 S' |
| Mar 11, 19 | 3:51 pm | | Processed Scheduled End of Day for 'Mar 11, 19 S' |

AutoSDS Integration

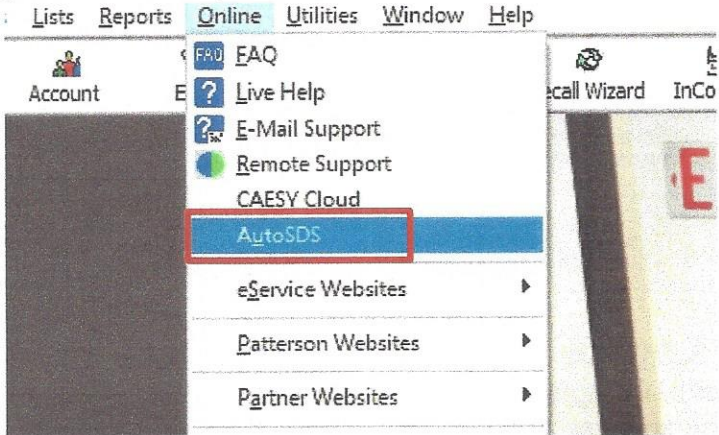
AutoSDS is a regulatory management system that keeps your Safety Data Sheet (SDS) requirements up to date and easily accessible.

Enabling AutoSDS Integration within Eaglesoft

To enable the **AutoSDS** integration, select **Utilities | Managed Integrated Applications**. Under this window, select the **AutoSDS** tab. In the tab, enter your **AutoSDS URL** and select **Save**.



To access **AutoSDS**, select **Online | AutoSDS**.



AutoSDS opens in your default browser.



Silent Install and Upgrade for Workstations: FAQ # 22724

Found under Upgrade Instructions:

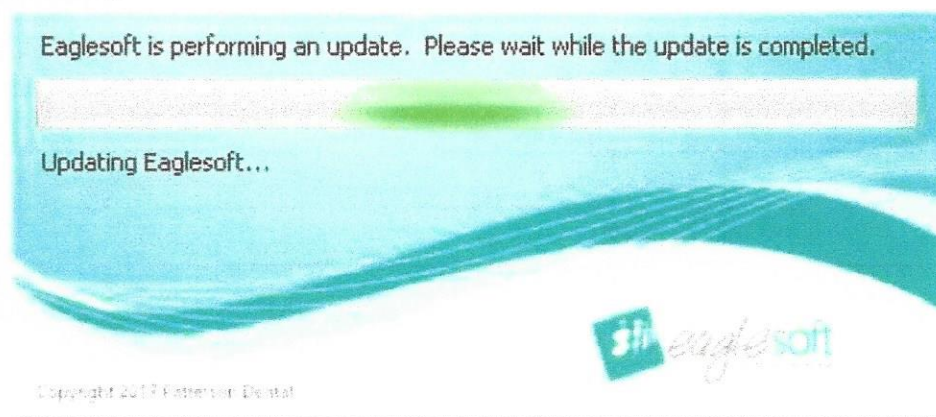
Follow the [Eaglesoft 21.00 Silent Workstation Installation Instructions](#) link if current installed version of Eaglesoft is 20.10. Eaglesoft 21 must already be installed with the normal instructions on the server computer first.

- **NOTE REMINDERS:** The Silent Installer works if the current installed version of Eaglesoft is 20.10 on the workstations.
- After the Server has been upgraded, simply double click the Eaglesoft Icon on the



Workstation.
start **automatically**.

If an update is available on the workstation, the installation will



- For those on version 20.00 or below, the installation package is necessary to upgrade on each workstation.

AES-256 Encryption: FAQ # 20069

With Eaglesoft Version 17-20.1, it has been possible to add simple **encryption** to your database and log files, adding an additional layer of protection for your office's data.

With Eaglesoft **Version 21 and Higher**, it is now possible to add **AES-256 Encryption** to your database log and files, using an even more secure **encryption** method of protection to your data.

If you are interested in **encrypting** your data through Eaglesoft, contact Support through [Live Chat](#) or call **Support at 1-800-475-5036** for assistance.

NOTES_____

[illegible]