



Revolve

Practice Transitions

Instructions for Dentrix Reports

Reports Include:

- Patient Demographics
- New Patient List
- Production by ADA Code
- Production by Provider
- Aging Report
- Additional Resources

The instructions in this letter are intended to be helpful tips for practice owners to pull data for the prospectus and Buyer Due Diligence. Revolve has provided their best effort to provide helpful and accurate instructions on how to pull these reports. However, it is ultimately the Seller and Buyer responsibility to ensure they are accurate. Additionally, software changes and packages may differ from office to office that can render these instructions out of date.

PATIENT DEMOGRAPHICS

What this Report Looks Like:

PRACTICE STATISTICS		
Workshop Dental Practice - Dentrix G5		
Date: 01/27/2015	Page: 1	
Patient Statistics	Total	Percent
Total Number entered in Family File (any status)	575	100.00
Number of guarantors that are not patients	3	0.52
Total Number of Patients	563	100.00
Number of patients that are not guarantors	288	51.15
Number of guarantors that are active patients	275	48.85
Number of male patients	290	51.51
Number of female patients	273	48.49
Number of married patients	199	35.35
Number of single patients	217	38.54
Number of child patients	142	25.22
Number of "Other" patients	5	0.89
Number of patients that do not have dental insurance	96	17.05
Number of patients that have primary dental insurance only	330	58.61
Number of patients that have secondary dental insurance	97	17.23
Number of patients that do not have medical insurance	502	89.17
Number of patients that have primary medical insurance only	1	0.18
Number of patients that have secondary medical insurance	0	0.00
Number of patients that have dental and medical insurance	60	10.66
Number of patients that do not have dental or medical insurance	95	16.87

Fictitious Data

Instructions to Pull this Report:

- Name of Report in System: "Practice Statistics"
 - This is a static report that shows active patients, New Patients seen in the last trailing 12 months, breakdown by zip code, etc.
- Go to Office Manager > Reports > Point to Management > Click Practice Statistics report
- Additional Links that Might Help:
 - [Online Instructions from Dentrix](#)

NEW PATIENT LIST

Instructions to Pull this Report:

- Name of Report in System: “New Patient List (Standard List)”
 - Will list all the NPs seen during a time period
- Go to Office Manager > Click reports > Point to Lists > Click New Patient List > Click all patients > All providers > Date Range > Standard list
- Additional Links that Might Help:
 - [Online Instructions from Dentrix](#)

PRODUCTION BY ADA CODE

What this Report Looks Like:

PRACTICE ANALYSIS - PRODUCTION SUMMARY
Dentrix Dental Practice
Codes D0120 - D0999
All Billing Types, 01/01/2012 - 12/31/2012
All Providers

Date: 01/09/2013 Page: 1

D0120	- PERIODIC ORAL EVALUATION	Quantity: 354	Total: 10,932.00	Average: 30.88	Percent: 48.95
D0140	- LIMITED ORAL EVALUATION	Quantity: 28	Total: 1,222.00	Average: 47.00	Percent: 5.47
D0145	- ORAL EVALUATION < 3 YRS OF AGE	Quantity: 2	Total: 94.00	Average: 47.00	Percent: 0.42
D0150	- COMPREHENSIVE ORAL EVALUATION	Quantity: 43	Total: 2,279.00	Average: 53.00	Percent: 10.20
D0210	- INTRAORAL COMPLETE SERIES (BIV)	Quantity: 39	Total: 3,315.00	Average: 85.00	Percent: 14.84
D0220	- INTRAORAL PERIAPICAL BITE FILM	Quantity: 2	Total: 54.00	Average: 18.00	Percent: 0.24
D0272	- BITEWINGS-TWO FILMS	Quantity: 2	Total: 58.00	Average: 29.00	Percent: 0.28
D0274	- BITEWINGS-FOUR FILMS	Quantity: 91	Total: 3,711.00	Average: 40.78	Percent: 16.02
D0330	- PANOROMIC FILM	Quantity: 8	Total: 632.00	Average: 79.00	Percent: 2.83
D0460	- PULP VITALITY TESTS	Quantity: 1	Total: 36.00	Average: 36.00	Percent: 0.16

TOTAL PRODUCTION CHARGES: 22,333.00
AVERAGE CHARGE FOR ALL PROCEDURES: 39.24

Instructions to Pull this Report:

- Name of Report in System: “Practice Analysis-Production Summary”
- Go to Office Manager > Reports > Point to Management Practice Reports- Practice Analysis > Reports > All Providers > All Billing Types > Date Range (i.e., Jan 1, 2022- Dec 31, 2022) > Production Summary (click include cross coding, click by proc code range and all)
- Click payment summary if you want to see what was collected compared to the production by ADA Code
- If you wanted to see Production by Category (restorative, preventive, etc.)- you would follow the steps above but click by category under production summary
- Additional Links that Might Help:
 - [Online Instructions from Dentrix](#)

PRODUCTION BY PROVIDER

What this Report Looks Like:

ANALYSIS SUMMARY(PROVIDER)
Dentrix Dental Practice
05/01/2020 - 05/20/2020
Providers DDS1 - DDS3

Date: 05/20/2020 Page: 1

Prov	Charges	Payments	Credit Adjustments	Charge Adjustments	Offsetting Adjustments	Finance Charges	Billed To Insurance
DDS1	2627.00	0.00	0.00	0.00	-16592.00	0.00	0.00
MTD:	2627.00	0.00	0.00	0.00	-16592.00	0.00	0.00
YTD:	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prev. Month:	0.00	0.00	0.00	0.00	0.00	0.00	0.00
DDS2	0.00	0.00	0.00	0.00	-3156.81	0.00	0.00
MTD:	0.00	0.00	0.00	0.00	-3156.81	0.00	0.00
YTD:	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prev. Month:	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL:	2627.00	0.00	0.00	0.00	-16470.00	0.00	0.00
Month-to-Date:	2627.00	0.00	0.00	0.00	-16470.00	0.00	0.00
Year-to-Date:	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Previous Month:	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Prov	New Pats Seen	Patients Seen	Avg Prod Per Patient	Avg Chg Per Procedure	Previous Balance	Balance	Net Change
DDS1	0	6	77.26	77.26	0.00	0.00	0.00
MTD:	0	6	77.26	77.26			
YTD:	0						
Prev. Month:	0						
DDS2	0	0	0.00	0.00	0.00	0.00	0.00
MTD:	0	0	0.00	0.00			
YTD:	0						
Prev. Month:	0						
TOTAL:	0	6	437.83	77.26	0.00	0.00	0.00
Month-to-Date:	0	6	437.83	77.26			
Year-to-Date:	0						
Previous Month:	0						

Instructions to Pull this Report:

- Name of Report in System: "Analysis Summary (Provider)"
- Go to Office Manager > Reports > Management > Analysis Summary
- Type in Report date that you want to print > Select all Providers > Select date range (entry date) > Include all totals> and click Print Condensed Report
- This shows production totals for each provider in the practice

AGING REPORT – A/R REPORT

What this Report Looks Like:

GUARANTOR NAME LAST STMT DATE	PHONE # AGREED PMT	BT	LAST PAYMENT AMOUNT/DATE	CURRENT 0-30	-PAST- 31-60	-PAST- 61-90	-PAST- > 90	INSR EST	GUAR PART	ACCOUNT BALANCE
Mueller, Erik T 10/18/2009	() PO 994 60*	1	200.00 10/09/2009	0.00	0.00	0.00	1474.20	432.80	1041.40	1474.20
Micek, Martin J	(734)459-8324	1	0.00	0.00	0.00	1455.60	0.00	1170.60	285.00	1455.60
Maiberg, Christopher 10/18/2009	(248)479-0852	1	0.00	0.00	1449.90	0.00	0.00	1449.90	0.00	1449.90
Wietecha, Thomas	(734)421-5336	0	251.00 09/20/2009	0.00	0.00	1427.50	0.00	2048.00	-620.50	1427.50

Instructions to Pull this Report:

- Name of Report in System: “Aging Report”
- In the Office Manager, go to Ledgers, and then click Aging Report. Make sure Standard Aging is selected. o Report Date is the default date (current date)
 - Select Billing type as All
 - Select Over 0 for minimum days past due
 - Select Guarantors as All
 - Select Primary Providers as All
 - Sort options- select By Guarantor Name
 - Minimum Balance to Print should say All
 - Last Payment Before should say Current
- Additional Links that Might Help:
 - [Online Instructions from Dentrix](#)

ADDITIONAL RESOURCES

For further help in pulling reports, click on the link below

[Office Manager - Management reports \(dentrix.com\)](#)