



Revolve

Practice Transitions

Instructions for Eaglesoft Reports

Reports Include:

- Patient Demographics
- Production by ADA Code
- Production by Provider
- Aging Report

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 Additionally, software changes and packages may differ from office to office that can render these instructions out of date.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:

Patient Analysis Report

| <u>Category:</u> | <u># of Active</u> | <u>% of Active</u> | <u>Category:</u> | <u># of Active</u> | <u>% of Active</u> |
|------------------|--------------------|--------------------|---------------------------------|--------------------|--------------------|
| Male: | 57 | 40.14% | Seen In Last 12 Months: | 5 | 3.52% |
| Female: | 85 | 59.86% | Seen In Last 24 Months: | 9 | 6.34% |
| | | | Seen In Last 36 Months: | 42 | 29.58% |
| | | | Seen More Than 36 Months Ago: | 64 | 45.07% |
| Ages 0 - 9: | 1 | 0.70% | Patients w/out Last Visit Date: | 22 | 15.49% |
| 10-19: | 7 | 4.93% | | | |
| 20-29: | 20 | 14.08% | New Patients Seen This Month: | 0 | 0.00% |

Instructions to Pull this Report:

- Name of Report in System: “Patient Analysis Report”
- Go to reports > Patient tab > Select the Patient Analysis Report
- This report shows:
 - Male/female patients
 - Active and inactive patients
 - Age range
 - Recall info
 - Number of patients with insurance
 - NPs seen year-to-date
 - Breakdown by Zip Code for patient location
- Additional Links that Might Help:
 - [Online Instructions from Eaglesoft](#)

PRODUCTION BY ADA CODE

What this Report Looks Like:

TIME 9:24 AM PTC & Associates DATE 8/10/2018

SERVICE CODES MASTER

| Service Code | ADA Code | Display Code | Description | Service Type | Standard Fee | Time Units | Generate Recall | Status |
|--------------|----------|--------------|--|----------------------------|--------------|------------|-----------------|--------|
| 00802 | 00802 | 00802 | Seat Bridge | PROSTHOODONTICS, FIXED | \$0.00 | 0 | No | Active |
| BITE | BITE | BITE | Bite Registration | DIAGNOSTIC | \$0.00 | 1 | No | Active |
| CERCR | D2740 | CERCR | CROWN-PORCELAIN CEREC | CEREC | \$1,010.00 | 4 | No | Active |
| CRDEL | CRDEL | CRDEL | Crown Delivery | ADJUNCTIVE GENERAL SERVICE | \$0.00 | 1 | No | Active |
| D0120 | D0120 | PEXAM | PERIODIC ORAL EVALUATION | PREVENTIVE | \$50.00 | 1 | No | Active |
| D0140 | D0140 | LEXAM | LIMITED ORAL EVALUATION-PROBLEM FOCUS | DIAGNOSTIC | \$42.00 | 1 | No | Active |
| D0145 | D0145 | D0145 | ORAL EVAL PT UNDER 3/PRIM CAREGIVER | DIAGNOSTIC | \$0.00 | 1 | No | Active |
| D0150 | D0150 | CEXAM | COMPREHENSIVE ORAL EVALUATION | DIAGNOSTIC | \$50.00 | 1 | No | Active |
| D0160 | D0160 | DEXAM | DETAILED & EXTENS ORAL EVAL-PRB FOCUSED DIAGNOSTIC | | \$25.00 | 1 | No | Active |

Instructions to Pull this Report:

- Name of Report in System: “Service Codes Master”
- Go to reports > Services > Service type productivity > Detailed to generate
- This shows all procedures completed by the office
- Additional Links that Might Help:
 - [Online Instructions from Eaglesoft](#)

PRODUCTION BY PROVIDER

What this Report Looks Like:

| <u>PROVIDER PRODUCTIVITY</u> This Year | | | | | |
|---|----------------------|-------------------|-------------------|-------------------|--------------------|
| | <u>Patients Seen</u> | <u>Avg. Visit</u> | <u>Production</u> | <u>Collection</u> | <u>Adjustments</u> |
| Diane Martin, RDH - Hygienist | 1 | \$1.00 | \$1.00 | \$0.00 | \$0.00 |
| | | | MTD | \$0.00 | \$0.00 |
| | | | YTD | \$0.00 | \$0.00 |
| George Young, DDS - Dentist | 0 | | \$0.00 | \$1.00 | \$0.00 |
| | | | MTD | \$1.00 | \$0.00 |
| | | | YTD | \$1.00 | \$0.00 |
| Current Totals | 1 | \$1.00 | \$1.00 | \$1.00 | \$0.00 |
| MTD Totals: | | | \$1.00 | \$1.00 | \$0.00 |
| YTD Totals: | | | \$1.00 | \$1.00 | \$0.00 |

Fictitious Data

Instructions to Pull this Report:

- Name of Report in System: “Provider Productivity”
- Go to Providers Reports > Highlight Provider Productivity > Click the Process
 - Under Dates select “Other Range of Dates,” > choose the beginning date and end date for the report, click Preview Report
- Additional Links that Might Help:
 - [Online Instructions from Eaglesoft](#)

AGING REPORT – A/R REPORT

What this Report Looks Like:

Fictitious Data

| Responsible Party | Current | 30 Days | 60 Days | 90 Days | Contract | Total A/R | - Est. Ins. | = Due Now |
|-------------------|------------|------------|---------|----------|----------|------------|-------------|------------|
| 2 Abbott, Charles | \$6,169.80 | \$1,283.00 | \$0.00 | \$518.08 | \$0.00 | \$7,971.48 | \$6,169.80 | \$1,801.68 |

Instructions to Pull this Report:

- Name of Report in System: “Accounts Receivable by Responsible Party”
- Go to Reports > Accounts Receivable by Responsible Party report > Filter. In the Range of Account Balances use the range \$. 01 to \$999,999.99.
- Additional Links that Might Help:
 - [Online Instructions from Eaglesoft](#)