



# Revolve

## Practice Transitions

## Instructions for Open Dental Reports

### Reports Include:

- Production by ADA Code
- Production by Provider
- Aging Report
- New Patients
- Active Patients

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 Additionally, software changes and packages may differ from office to office that can render these instructions out of date.

# PRODUCTION BY ADA CODE

What this Report Looks Like:

**Procedures By Procedure Code**  
Co-NC Dental  
01/10/2022 - 01/10/2022  
All Providers  
All Clinics (includes hidden)

Date: 01/10/2022

Category	Code	Description	Quantity	Average Fee	Total Fees
Exams & Xrays	D0120	periodic oral evaluation	7	44.00	308.00
Exams & Xrays	D0220	intraoral - periapical xrs	5	27.00	135.00
Exams & Xrays	D0274	bite wings - full radiogr	6	58.00	348.00
Exams & Xrays	D0330	panoramic radiographic	11	119.00	1,309.00
Cleanings	D1110	prophylaxis - adult	8	82.00	656.00
Cleanings	D1120	prophylaxis - child	10	60.00	600.00
Cleanings	D1208	topical application of flu	5	43.00	215.00
					<b>3,571.00</b>

## Instructions to Pull this Report:

- Name of Report in System: "Procedure by Procedure Code"
- Go to Reports > Standard > Daily > Procedures > Selected date range > Select 'All Providers'.
- Additional Links that Might Help:
  - [Online Instructions from Open Dental](#)

# PRODUCTION BY PROVIDER

What this Report Looks Like:

<b>Provider Production and Income</b>							
Co-NC Dental							
03/24/2022 - 03/24/2022							
All Providers							
North							
Provider	Production	Adjustments	Write-off	Tot Prod	Pt Income	Ins Income	Total Income
NDoc1	1,925.00	-92.25	-8.00	1,824.75	1,495.62	72.00	1,567.62
NDoc3	6,254.08	-37.52	-254.80	5,961.76	1,051.76	4,800.00	5,851.76
NDoc2	5,158.25	-38.69	-150.05	4,969.51	1,234.51	3,879.80	5,114.31
NHyg1	3,252.08	-19.51	-252.08	2,980.49	575.86	2,440.00	3,015.86
NHyg2	3,668.36	-22.01	-168.36	3,477.99	643.98	2,800.00	3,443.98
NHyg3	2,145.03	-16.09	0.00	2,128.94	480.71	1,608.77	2,089.48
	<b>22,402.80</b>	<b>-226.07</b>	<b>233.21</b>	<b>21,343.44</b>	<b>5,482.44</b>	<b>15,600.57</b>	<b>21,083.01</b>

## Instructions to Pull this Report:

- Name of Report in System: “Provider Production and Income”
- Go to Reports > Standard > Production and Income Section > More Options > Provider Report > Select ‘All Providers > Select Date Range
- Additional Links that Might Help:
  - [Online Instructions from Open Dental](#)

# AGING REPORT – A/R REPORT

What this Report Looks Like:

**AGING OF ACCOUNTS RECEIVABLE**  
 Co-NC Dental  
 As of 03/02/2022  
 Any Balance  
 All Billing Types  
 All Providers  
 All Clinics (includes hidden)

Date 03/02/2022

Patient	0-30 Days	31-60 Days	61-90 Days	> 90 Days	Total	-W/O Est	-Ins Est	=Patient
Carson, Candi	0.00	2.10	0.00	140.00	142.10	0.00	0.00	142.10
Carson, Sandy	0.00	904.00	0.00	0.00	904.00	0.00	0.00	904.00
Charles, Angus	1,003.00	31.95	0.00	0.00	1,034.95	13.00	113.00	908.95
Charles, Patty	0.00	0.75	37.25	0.00	38.00	0.00	0.00	38.00
Crest, Andrew	1,902.00	237.00	231.80	0.00	2,370.80	20.00	228.00	2,122.80
Crest, Arden	437.00	0.00	0.00	0.00	437.00	0.00	89.00	348.00
Crest, Belle	124.00	0.00	0.00	0.00	124.00	0.00	0.00	124.00
Crest, Oliver	834.00	3,400.33	0.00	0.00	4,234.33	0.00	89.00	4,135.33
Danielson, Collette	343.00	0.00	0.00	0.00	343.00	0.00	0.00	343.00
Gonzalez, Maria	0.00	236.00	0.00	0.00	236.00	24.00	236.00	-24.00
Hassan, Ahmed	835.00	391.00	0.00	0.00	1,226.00	0.00	363.00	863.00
Kessler, Carlos	380.00	0.00	0.00	0.00	380.00	35.00	345.00	0.00
Laredo, Ari	382.00	0.00	0.00	0.00	382.00	0.00	382.00	0.00
Laredo, Henry	417.00	0.00	0.00	304.00	721.00	0.00	153.60	567.40
Lopez-Garcia, Gloria	469.00	0.00	0.00	0.00	469.00	19.00	206.00	244.00
Lopez-Garcia, Mateo	608.00	0.00	0.00	0.00	608.00	30.00	333.00	245.00
Newsom, Nancy	280.25	0.00	0.00	0.00	280.25	0.00	0.00	280.25
Nguyen, Kim	986.60	0.00	0.00	0.00	986.60	0.00	0.00	986.60
Nguyen, Li	243.00	0.00	0.00	0.00	243.00	0.00	0.00	243.00
Rosen, Allen	0.00	98.32	0.00	0.00	98.32	0.00	0.00	98.32
Smith, John	1,678.50	0.00	0.00	0.00	1,678.50	0.00	0.00	1,678.50
Wilson, Paulette	380.00	0.00	0.00	0.00	380.00	0.00	0.00	380.00
Zabrowski, Christie	1,237.00	0.00	0.00	0.00	1,237.00	0.00	0.00	1,237.00
Zarren, Bob	0.00	44.90	0.00	25.00	69.90	0.00	0.00	69.90
	<b>12,539.35</b>	<b>5,346.35</b>	<b>269.05</b>	<b>469.00</b>	<b>18,623.75</b>	<b>151.00</b>	<b>2,537.60</b>	<b>15,935.15</b>

## Instructions to Pull this Report:

- Name of Report in System: “Aging of Accounts Receivable”
- Go to Reports > Standard > Monthly Section > Aging of A/R > Select Date > Select “Any Balance” under the “Age of Account” section
- Additional Links that Might Help:
  - [Online Instructions from Open Dental](#)

# NEW PATIENTS

What this Report Looks Like:

**New Patients**  
Co-NC Dental  
All Providers  
08/01/2022 - 08/31/2022

Date: 09/02/2022

#	Date	Last Name	First Name	Referral	Production Fee
1	08/01/2022	Albert	Adam		99.00
2	08/01/2022	Zarren	Amy		423.10
3	08/03/2022	Smith	Sally	Online Ad	252.00
4	08/05/2022	Torres	Jose		236.00
5	08/09/2022	Blum	Maxwell	Blum, Hetta	960.00
6	08/30/2022	Charles	Candi		
7	08/30/2022	Charles	Sandy		
					<b>2,364.60</b>

AGING REPORT - A/I

Fictitious Data

Close

## Instructions to Pull this Report:

- Name of Report in System: “New Patients”
- Go to Reports > Standard > Select ‘New Patients’ in the list section > Select ‘All Providers’ > Select today’s date
- Additional Links that Might Help:
  - [Online Instructions from Open Dental](#)

# ACTIVE PATIENTS

What this Report Looks Like:

**Active Patients**  
02/01/2022 - 02/01/2022  
All Providers  
All Billing  
All Patient Statuses

Name	Provider	Address	Address2	City	State	Zip	Carrier
Kessler, Carlos	DOC1	588 State Hwy 343 S		Camden	NC	27921	MedDent Insurance
Lopez-Garcia, Gloria	DOC1	996 Waterlily Rd		Coinjock	NC	27923	Azure Insurance
Lopez-Garcia, Mateo	DOC1	996 Waterlily Rd		Coinjock	NC	27923	Azure Insurance
Newsom, Nancy	DOC1	15 Welcome Ave #295		Albemarle	NC	28001	Azure Insurance
Smith, John	DOC1	125 Satin Heights		Columbia	NC	28527	MedDent Insurance
Zabrowski, Christie	DOC1	4323 Seascape Dr		Kitty Hawk	NC	27549	Global Health Allian
Butler, Angus	DOC2	4528 Panama St SE		Albemarle	NC	28002	Azure Insurance
Crest, Arden	DOC2	1730 E Douglas Fir Dr		Columbia	NC	28527	Azure Insurance
Crest, Belle	DOC2	1730 E Douglas Fir Dr		Columbia	NC	28527	Azure Insurance
Crest, Oliver	DOC2	1730 E Douglas Fir Dr		Columbia	NC	28527	MedDent Insurance
Crest, Andrew	EDoc	1730 E Douglas Fir Dr		Columbia	NC	28527	Azure Insurance
Danielson, Collette	NDoc	501 Main St		Columbia	NC	27925	
Torres, Jose	NDoc	100 Main St		Hertford	NC	27944	
Wilson, Paulette	NDoc	1390 Pine Beach Rd	Apt 4	Columbia	NC	27925	
Nguyen, Kim	NDoc 2	100 Bruce Dr		Elizabeth City	NC	27909	
Nguyen, Li	NDoc 2	100 Bruce Dr		Elizabeth City	NC	27909	MedDent Insurance

## Instructions to Pull this Report:

- Name of Report in System: “Active Patients”
- Go to Reports > Standard > Select ‘Active Patients’ in the list section > Select ‘All Providers > Select today’s date
- Additional Links that Might Help:
  - [Online Instructions from Open Dental](#)