



Revolve

Practice Transitions

Instructions for PracticeWorks Reports

Reports Include:

- New Patient List
- Production by ADA Code
- Production by Provider
- Aging Report
- 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 Additionally, software changes and packages may differ from office to office that can render these instructions out of date.

NEW PATIENT LIST

What this Report Looks Like:

New Patient Analysis Report									
Office: Demonstration Dentist									
Page 1									
Printed on 01-04-10 at 8:02a									
New Patient Trending									
	2008			2009			2010		
	Count	Increase	Growth	Count	Increase	Growth	Count	Increase	Growth
January	0	n/a	n/a	2	2	INF	2	0	0.0%
February	0	n/a	n/a	1	1	INF	n/a	n/a	n/a
March	0	n/a	n/a	0	0	0.0%	n/a	n/a	n/a
April	0	n/a	n/a	0	0	0.0%	n/a	n/a	n/a
May	0	n/a	n/a	1	1	INF	n/a	n/a	n/a
June	0	n/a	n/a	0	0	0.0%	n/a	n/a	n/a
July	0	n/a	n/a	0	0	0.0%	n/a	n/a	n/a
August	0	n/a	n/a	0	0	0.0%	n/a	n/a	n/a
September	0	-1	-100.0%	0	0	0.0%	n/a	n/a	n/a
October	0	0	0.0%	1	1	INF	n/a	n/a	n/a
November	0	0	0.0%	7	7	INF	n/a	n/a	n/a
December	5	-8	-61.5%	22	17	77.3%	n/a	n/a	n/a

Total appointments made/rescheduled this month: 50
 Total appointments made/rescheduled this week: 50
 Total appointments made/rescheduled today: 50
 Total new patient appointments expected in the next 90 days: 68

Next Available New Patient Appointments
 Identified using Pre-defined Appointment type "New patient exam - adult" as of 3 "New patient exam - adult" appointments per appointment book.

Appointment Book: All 8 Chairs

	Morning (Before Noon)	Afternoon (Noon to 5pm)	Evening (After 5pm)
SUSIE	Fri Jan 8, 8:00a	Wed Jan 6, 1:00p	Wed Jan 6, 6:00p
POLLY	Fri Jan 8, 8:00a	Wed Jan 6, 12:00p	Wed Jan 13, 5:00p
#3 (HYG)	Tue Jan 5, 8:00a	Tue Jan 5, 1:00p	Wed Jan 6, 5:00p
#4 (LEX)	Mon Jan 11, 10:30a	Wed Jan 6, 12:00p	Wed Jan 13, 5:00p
#5 (LEX)	Thu Jan 7, 11:30a	Tue Jan 5, 1:00p	Wed Jan 6, 6:00p
#6 (BAS)	Tue Jan 5, 10:00a	Tue Jan 5, 3:00p	None
#7 (BAS)	Tue Jan 5, 8:00a	Tue Jan 5, 1:00p	Wed Jan 6, 5:00p
Overflow	Tue Jan 5, 8:00a	Tue Jan 5, 1:00p	Wed Jan 6, 5:00p

Instructions to Pull this Report:

- Name of Report in System: “New Patient Analysis Report”
- The New Patients Analysis Report displays the number of patients with a first visit date. The count is broken down by year and then month, specialty, and provider.
- Select File > Print > Patients > New Patient Analysis. The New Patient Analysis Report window is displayed.
- Additional Links that Might Help:
 - [Online Instructions from PracticeWorks](#)

PRODUCTION BY ADA CODE

What this Report Looks Like:

Individual Production Summary

For 01-01-10 through 01-04-10
Production Owner: James Klein, DDS

Page 1
Printed on 01-04-10 at 8:51a

Producer: James Klein, DDS

Code	Description	Count	Amount
00120	Periodic Oral Evaluation	3	120.00
00140	Lim Oral Eval-Prob Focus	2	26.00
00210	Full Mouth Series	1	95.00
00274	Bitewings - four	1	55.00
00330	Panoramic	1	95.00
02160	Amalgam - 3 Surfaces	1	58.00
02392	Resin Comp - 2 surf Post	3	495.00
02393	Resin Comp - 3 surf Post	2	380.00
02750	Crown, Porc/High Noble	5	4,214.00
02950	Cone Beam, Inc. Pins	1	275.00
04341	Perio SRP - 4+ Th/Quad	2	390.00
04342	Perio SRP - 1-3 Th/Quad	1	95.00
07210	Enlight	2	350.00
09230	N2O analgesia	1	16.00
09310	Consultation	2	150.00
Totals for Producer:		28	6,814.00

Producer: Generic Hygiene

Code	Description	Count	Amount
00120	Periodic Oral Evaluation	6	240.00
00272	Bitewings - two	1	15.00
00274	Bitewings - four	7	360.00
00330	Panoramic	1	42.50
01110	Prophylaxis - Adult	1	461.00
01120	Prophylaxis - Child	1	22.00
01203	Fluoride - Child	1	11.50
01330	Oral Hygiene Instruction	1	72.00
Totals for Producer:		30	1,223.00

Producer: Polly Pocket, RDH

Code	Description	Count	Amount
00274	Bitewings - four	1	55.00
01110	Prophylaxis - Adult	1	72.00
04341	Perio SRP - 4+ Th/Quad	1	195.00
Totals for Producer:		3	322.00

Producer: Susie Sulcut, RDH

Code	Description	Count	Amount
00150	Comp Oral Eval	1	75.00
00210	Full Mouth Series	1	95.00
00274	Bitewings - four	1	65.00
01110	Prophylaxis - Adult	2	117.00
01204	Fluoride - Adult	1	25.00
01330	Oral Hygiene Instruction	1	0.00
Totals for Producer:		7	377.00
Totals for Production Owner:		68	8,736.00

Instructions to Pull this Report:

- Name of Report in System: “Individual Production Summary”
- This report summarizes each provider’s production by displaying each ADA code performed, how many times it was performed, and the total production value per procedure. The total number of patients seen, procedures performed, and total fees are displayed for each producer.
- Select File > Print > Accounts Receivables > Periodic Reports > Production Summary
- Additional Links that Might Help:
 - [Online Instructions from PracticeWorks](#)

PRODUCTION BY PROVIDER

What this Report Looks Like:

Periodic AR Recap Sheet									
For 01-01-10 through 01-04-10									
Klein, James									
Page 1									
Printed on 01-04-10 at 8:51a									
IMPORTANT: There is an appointment on 01-04-10 that has not yet been checked out!									
Producers	Pts Seen/ Apts	Procedures Performed	Gross Production	Production Adjustments	Net Production	Goal	Goal Met	Collection Adjustments	Other Adjustments
Klein, James	16/12	28	6,814.00	-10.00	6,804.00	7,000.00	97%	0.00	-5.00
Stuen, Brenda	5/0	8	360.00	0.00	360.00	4,000.00	9%	0.00	0.00
Hygiene, Generic	8/6	30	1,223.00	0.00	1,223.00	0.00		0.00	0.00
Pocket, Polly	2/2	3	222.00	0.00	222.00	1,800.00	12%	0.00	0.00
Subot, Susie	2/2	7	377.00	0.00	377.00	1,800.00	21%	0.00	0.00
			9,096.00	-10.00	9,086.00	14,600.00	62%	0.00	-5.00
Total beginning A/R:			8,718.20		8,718.20				
Beginning payment plans:			900.00		900.00				
Beginning A/R due now:			7,818.20		7,818.20				
Production:			9,096.00		9,096.00				
Collection:			-4,594.50		-4,594.50				
Bad Debt Write Offs:			0.00		0.00				
Credit Balance Refunds:			0.00		0.00				
Production Adjustments:			-10.00		-10.00				
Collection Adjustments:			0.00		0.00				
Other Adjustments:			-5.00		-5.00				
Interest / Billing Fees:			0.00		0.00				
Taxes:			0.00		0.00				
Payment Plan Billings:			900.00		900.00				
Transfer to Payment Plans:			0.00		0.00				
Ending A/R due now:			13,204.70		13,204.70				
Ending payment plans:			0.00		0.00				
Total Ending A/R:			13,204.70		13,204.70				
Collection At Time Of Service:			29%						
Number of new patients:			13						
The beginning balance figures on this report are carried over from the report originally printed on 12-31-09. Checking the "Reconciliation report" option when printing this report will list the corrections made.									
Adjustments during the period covered by this report	Entry date	Service date	Patient / person	Description	Adjustment type	Producer	Amount		
	01-04-10	01-04-10	Dwigans, Paul	Delta Dental Write Off/Invc	12-18-09 Other Adj.	JEK	-5.00		
	01-04-10	01-04-10	Dykes, Clarence	Courtesy discount	Production Adj.	JEK	-10.00		
	01-04-10	01-04-10	Helms, Cherish	Payment plan billing		JEK	300.00		
	01-04-10	01-04-10	Huber, Amanda	Payment plan billing		JEK	400.00		
	01-04-10	01-04-10	Keller, Sabrina	Payment plan billing		JEK	200.00		

Instructions to Pull this Report:

- Name of Report in System: "Periodic AR Recap Sheet"
- The A/R Recap summarizes the day's transactions, including the daily totals for gross production, net production, and adjustments posted for each producer, and totals for the practice. Also included are the beginning and ending A/R for the day, month, and year; number of new patients for the day, and the percentage of money collected at the time of service.
- File > Print > Accounts Receivables > Daily Reports
- Additional Links that Might Help:
 - [Online Instructions from PracticeWorks](#)

AGING REPORT – A/R REPORT

What this Report Looks Like:

Individual Accounts Receivable Report Page 1

James Klein, DDS Printed on 01-04-10 at 9:00a

Account	AR Owner	Active Contracts	Current	30 days	60 days	90 days	120 days	Pay plans	Total AR
Abbott, Stephanie	JEK	0.00	202.00	0.00	0.00	0.00	0.00	0.00	202.00
Adair, Jacob	JEK	0.00	100.00	0.00	0.00	0.00	0.00	0.00	100.00
Adcock, Larry	JEK	0.00	90.00	0.00	0.00	0.00	0.00	0.00	90.00
Adkins, Ray	JEK	0.00	596.00	0.00	0.00	0.00	0.00	0.00	596.00
Anderson, Bradley	JEK	0.00	245.00	0.00	0.00	0.00	0.00	0.00	245.00
Armstrong, April	JEK	0.00	35.00	0.00	0.00	0.00	0.00	0.00	35.00
Armstrong, Craig	JEK	0.00	100.00	0.00	0.00	0.00	0.00	0.00	100.00
Baker, Kenneth	JEK	0.00	228.00	0.00	0.00	0.00	0.00	0.00	228.00
Banta, Brooke	JEK	0.00	133.00	48.00	0.00	479.00	0.00	0.00	660.00
Barron, Susan	JEK	0.00	0.00	864.00	0.00	0.00	0.00	0.00	864.00
Beckner, Mark	JEK	0.00	57.00	0.00	0.00	0.00	0.00	0.00	57.00
Bennett, Jeremy	JEK	0.00	75.00	0.00	0.00	0.00	0.00	0.00	75.00
Benson, Joe	JEK	0.00	190.00	0.00	0.00	0.00	0.00	0.00	190.00
Boles, Jeremy	JEK	0.00	360.00	0.00	0.00	0.00	0.00	0.00	360.00
Brown, Wesley	JEK	0.00	36.00	0.00	0.00	0.00	0.00	0.00	36.00
Burress, Lori A	JEK	0.00	35.00	0.00	0.00	0.00	0.00	0.00	35.00
Cage, Danny	JEK	0.00	2,000.00	100.00	100.00	100.00	1,100.00	0.00	3,400.00
Calhoun, Donald	JEK	0.00	150.00	0.00	0.00	0.00	0.00	0.00	150.00
Callas, Christopher	JEK	0.00	-200.00	0.00	0.00	0.00	0.00	0.00	-200.00
Campbell, Cathy	JEK	0.00	2,095.00	0.00	0.00	0.00	0.00	0.00	2,095.00
Cannon, Rocky	JEK	0.00	-300.00	0.00	0.00	0.00	0.00	0.00	-300.00
Carrsder, Lewis	JEK	0.00	-550.00	0.00	0.00	0.00	0.00	0.00	-550.00
Curtain, Michael	JEK	0.00	0.00	432.00	0.00	0.00	0.00	0.00	432.00
Daily, George	JEK	0.00	0.00	29.00	0.00	0.00	0.00	0.00	29.00
Dean, Eric	JEK	0.00	0.00	29.00	0.00	0.00	0.00	0.00	29.00
Demaree, Sheri	JEK	0.00	75.00	0.00	0.00	0.00	0.00	0.00	75.00
Doss, Carol	JEK	0.00	0.00	29.00	0.00	0.00	0.00	0.00	29.00
Douglas, Austin	JEK	0.00	-29.00	0.00	0.00	0.00	0.00	0.00	-29.00
Dunlap, Steve	JEK	0.00	150.00	0.00	0.00	0.00	0.00	0.00	150.00
Dwiggins, Paul	JEK	0.00	29.00	0.00	0.00	0.00	0.00	0.00	29.00
Dykes, Clarence	JEK	0.00	117.00	0.00	0.00	0.00	0.00	0.00	117.00
Earlsene, Timmie	JEK	0.00	320.00	0.00	0.00	0.00	0.00	0.00	320.00
Eaton, Michael	JEK	0.00	265.00	0.00	0.00	0.00	0.00	0.00	265.00
Ferguson, Dewey	JEK	0.00	225.00	0.00	0.00	0.00	0.00	0.00	225.00
Hall, Victoria	JEK	0.00	0.00	0.00	0.00	0.00	745.00	0.00	745.00
Hedckman, Joseph	JEK	0.00	0.00	0.00	0.00	0.00	0.00	0.00	29.00
Herrin, Ladonna	JEK	0.00	29.00	0.00	0.00	0.00	0.00	0.00	29.00
Hewlett, Dave	JEK	0.00	500.00	0.00	0.00	0.00	0.00	0.00	500.00
Hodges, John	JEK	0.00	0.00	0.00	29.00	0.00	0.00	0.00	29.00
Hodkins, Keith	JEK	0.00	0.00	0.00	0.00	0.00	0.00	0.00	29.00
Jensen, Aaron	JEK	0.00	49.00	0.00	0.00	0.00	0.00	0.00	64.00
Johnson, Tom	JEK	0.00	0.00	1.20	233.00	0.00	0.00	0.00	234.20
Jones, Brett	JEK	0.00	226.00	0.00	0.00	0.00	0.00	0.00	226.00
Lacy, James	JEK	0.00	29.00	0.00	0.00	0.00	0.00	0.00	29.00
Lashbrook, Kelly	JEK	0.00	29.00	0.00	0.00	0.00	0.00	0.00	29.00
Lewis, Jimmy	JEK	0.00	149.00	0.00	0.00	0.00	0.00	0.00	149.00

Instructions to Pull this Report:

- Name of Report in System: “Individual Accounts Receivable Report”
- The Aged Receivables Report displays the aged balances of accounts and the total aging of all receivables as of today. You can set criteria to include only patients with balances of a specific age (current, 30-days, 60-days, 90-days, 120 days), or to include only patients with credit balances.
- Go to Home > File > Print > Accounts and Receivables
- Additional Links that Might Help:
 - [Online Instructions from PracticeWorks](#)

ACTIVE PATIENTS

Go to the Experts Menu>Office Expert and then scroll to the bottom of the list, the last entry is going to be active patient count. Highlight the entry and it will give you the number of active patients you currently have in your system along with the number of those patients you have seen in the last 18 months.

Currently, there is not a way to print this aside from taking a screenshot of it and printing the image.