



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 Additionally, software changes and packages may differ from office to office that can render these instructions out of date.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

CS SoftDent Software v17.1.0		Demonstration Dentist	
REGISTER FOR A PERIOD			
06/04/18 thru 06/20/18			
PRACTICE			
Fictitious Data			
Patients Seen.....	7		
New Patients.....	2		
Productions.....	\$1,412.00		
Charges.....	\$0.00		
Adjustments to Prod.....	\$0.00	Amount due to PPO writeoffs	\$0.00
Tax Liability.....	\$0.00		
Net Productions.....	\$1,412.00		
Collections.....	\$1,946.60		
Cash.....		\$0.00	
Check.....		\$286.00	
Credit Card.....		\$300.00	
EFT.....		\$1,360.60	
Adjustment to Collections.....	\$0.00		
Net Collections.....	\$1,946.60		
Ins Plan Collections.....		\$0.00	
Regular Collections.....		\$1,946.60	
Average Production			
Per Patient.....	\$201.71	Per Hour.....	\$75.64

NOTE: Patient counts may be inaccurate if run over a time period where transactions have been compressed.

Instructions to Pull this Report:

- Name of Report in System: “Daily, Monthly, Yearly or Period Register”
- Select Reports > Accounting > Registers > report type.
 - The Output Options window is displayed.
- Select the output and click OK. The Register Setup window is displayed.
- In the Providers section, click the drop-down arrow to select the provider number from a list, or leave the first provider set to 999 to report on all providers.
- Click OK.

PRODUCTION BY ADA CODE

What this Report Looks Like:

CS SoftDent Software v14.2.7 Demonstration Dentist

PRODUCTION/TRANSACTIONS BY CODE

07/07/07 TO 01/04/10

PROVIDER (1) Dr. Doctor Smiley

Fictitious Data

CODE	DESCRIPTION	FEE \$	PRVDR QTY.	GROUP QTY.	% QTY.	PRVDR AMNT \$	UCR AMNT	GROUP AMNT \$	UCR AMNT	% AMNT \$	PRVDR Prod Rate \$/hr	GROUP Prod Rate \$/hr
2.00	Insurance Check Payment	***	12	13	92.31	1794.10	***	1870.60	***	95.91	***	***
3.00	Check Payment	***	13	15	86.67	1546.40	***	1795.40	***	86.13	***	***
12.00	Via Card Payment	***	4	4	100.00	976.70	***	976.70	***	100.00	***	***
40.90	PER VISIT CHARGE	***	1	1	100.00	5.00	***	5.00	***	100.00	***	***
49.00	Starting Debit Balance	***	1	1	100.00	23.00	***	23.00	***	100.00	***	***
50.90	Participating Insurance Ad	***	6	6	100.00	308.00	***	308.00	***	100.00	***	***
58.90	Patient Budget Credit Code	***	1	1	100.00	1850.00	***	1850.00	***	100.00	***	***
120.00	Periodic oral evaluation -	36.00	8	10	80.00	253.00	241.00	320.00	299.00	79.06	94.00	96.00
130.00	Emergency Oral Exam	0.00	1	4	25.00	49.00	49.00	196.00	196.00	25.00	98.00	98.00
140.00	Limited Oral Evaluation -	48.00	1	1	100.00	38.00	38.00	38.00	38.00	100.00	114.00	114.00
150.00	Comprehensive Oral Eval -	69.00	14	16	87.50	647.00	686.00	751.00	790.00	86.15	117.00	118.00
210.00	Intraoral - Complete Serie	21.00	1	1	100.00	80.00	97.00	80.00	97.00	100.00	240.00	240.00
220.00	Intraoral - Periapical - F	20.00	2	2	100.00	32.00	32.00	32.00	32.00	100.00	***	***
230.00	Intraoral - Periapical - E	18.00	1	1	100.00	12.00	23.00	12.00	23.00	100.00	***	***
270.00	Bitewing - Single Film	16.00	1	1	100.00	16.00	16.00	16.00	16.00	100.00	***	***
272.00	Bitewings - Two Films	38.00	13	13	100.00	524.00	524.00	524.00	524.00	100.00	240.00	240.00
274.00	Bitewings - Four Films	65.00	1	2	50.00	52.00	52.00	92.00	104.00	56.52	312.00	276.00
330.00	Panoramic Film	100.00	1	2	50.00	70.00	90.00	160.00	180.00	43.75	***	***
1110.00	Prophylaxis - Adult	85.00	6	16	37.50	319.00	406.00	954.00	1070.00	33.44	79.00	133.00
1120.00	Prophylaxis - Child	79.00	3	8	37.50	143.00	189.00	435.00	504.00	32.87	143.00	200.00
1203.00	Fluoride (not incl. apply)	25.00	2	2	100.00	48.00	40.00	48.00	40.00	100.00	48.00	48.00
1204.00	Fluoride (not incl. apply)	39.00	1	2	50.00	24.00	31.00	45.00	62.00	53.33	48.00	45.00
1351.00	Sealant - Per Tooth	54.00	6	6	100.00	258.00	258.00	258.00	258.00	100.00	129.00	129.00
2140.00	Amalgam - 1 Surface, prima	88.00	3	3	100.00	288.00	288.00	288.00	288.00	100.00	288.00	288.00
2150.00	Amalgam - 2 Surfaces, prim	133.00	1	1	100.00	106.00	106.00	106.00	106.00	100.00	318.00	318.00
2160.00	Amalgam - 3 Surfaces, prim	156.00	1	1	100.00	125.00	125.00	125.00	125.00	100.00	375.00	375.00
2330.00	Resin Composite - 1 Surface	129.00	2	2	100.00	206.00	206.00	206.00	206.00	100.00	154.00	154.00
2331.00	Resin Composite - 2 Surface	129.00	1	1	100.00	103.00	103.00	103.00	103.00	100.00	206.00	206.00
2386.00	Composite - Six Post	0.00	3	3	100.00	438.00	438.00	438.00	438.00	100.00	219.00	219.00
2391.00	Resin Composite - 1 Surface	189.00	5	5	100.00	571.00	755.00	571.00	755.00	100.00	***	***
2392.00	Resin Composite - 2 Surface	129.00	3	3	100.00	285.00	291.00	285.00	291.00	100.00	***	***
2393.00	Resin Composite - 3 Surface	138.00	2	3	66.67	263.00	220.00	373.00	330.00	70.51	***	***
2400.00	Crown - Porcelain Fused to	850.00	12	13	92.31	8160.00	8160.00	8840.00	8840.00	92.31	510.00	510.00

Continued on next page... Current Dental Terminology (CDT) © American Dental Association (ADA). All rights reserved.

Created by: <BLANK> Page 1 of 8 01/04/10 09:58a

Instructions to Pull this Report:

- Name of Report in System: “Production by ADA Code”
- Select Reports > Practice Management > Production Reports > By ADA. The Output Options window is displayed.
- Select the output option and click OK. The Production/Transactions by Code Report window is displayed.
- Select the starting and ending transaction dates from the appropriate drop-down lists.
- Click OK.

PRODUCTION BY PROVIDER

What this Report Looks Like:

CS SoftDent Software v17.1.0 Demonstration Dentist

REGISTER FOR A PERIOD

06/04/18 thru 06/20/18
PRACTICE

Fictitious Data

Patients Seen.....	7		
New Patients.....	2		
Productions.....	\$1,412.00		
Charges.....	\$0.00		
Adjustments to Prod.....	\$0.00	Amount due to PPO writeoffs	\$0.00
Tax Liability.....	\$0.00		
Net Productions.....	\$1,412.00		
Collections.....	\$1,946.60		
Cash.....		\$0.00	
Check.....		\$286.00	
Credit Card.....		\$300.00	
EFT.....		\$1,360.60	
Adjustment to Collections.....	\$0.00		
Net Collections.....	\$1,946.60		
Ins Plan Collections.....		\$0.00	
Regular Collections.....		\$1,946.60	
Average Production			
Per Patient.....	\$201.71	Per Hour.....	\$75.64

NOTE: Patient counts may be inaccurate if run over a time period where transactions have been compressed.

Instructions to Pull this Report:

- Name of Report in System: “Daily, Monthly, Yearly or Period Register”
- Select Reports > Accounting > Registers > report type. The Output Options window is displayed.
- Select the output and click OK. The Register Setup window is displayed.
- In the Providers section, click the drop-down arrow to select the provider number from a list, or leave the first provider set to 999 to report on all providers.
- Select the Include Receivables Totals checkbox if you want the report to print the receivables figure for the entire system to date.
 - Your Receivables Total file (RCVTOT.DAT) must be current for these figures to be accurate.
- Click OK.

AGING REPORT – A/R REPORT

What this Report Looks Like:

CS SoftDent Software v14.2.7

ACCOUNT AGING REPORT

Demonstration Dentist

Filter Specifications

Only Include Accounts from Office: **101**

Only Include Transactions from Office: **All Offices**

Only Include Transactions whose Collection Provider is: **All Providers**

Exclude Accounts with User Code(s): **[C11]**

Include Accounts with debit balance: **Yes**

Include Accounts with balance greater than or equal to: **\$0.00**

Include Accounts overdue within: **0-30 31-60 61-90 over 90 days**

Include Accounts with a \$0 balance: **No**

Include Accounts with a credit balance: **No**

Print Accounts in Oldest Balance Order: **No**

CS SoftDent Software v14.2.7

ACCOUNT AGING REPORT

Demonstration Dentist

No Balance Mismatches Found.

Practice Aging Summary

Accounts Receivable

Current	8,431.00	2,166.80 is due to outstanding insurance.
30 days	+	0.00
60 days	+	0.00
90 days	+	4,081.00
Credits	-	0.00
Total (Net 30)	12,511.97	

Note: All charges (or portions of charges) waiting on insurance are considered current.

This reflects the receivables for all amounts NOT on budget plans.

On Budget Plans + 0.00
This reflects all outstanding dollars transferred to budget plans.

12,511.97

This reflects the TRUE receivables.

Outstanding Insurance Breakdown

Current	0.00
30 days	+
60 days	+
90 days	+
Total	8,276.80

Instructions to Pull this Report:

- Name of Report in System: “Account Aging”
- Select Reports > Accounting > Account Aging. The Output Options window is displayed.
- Select the output type and click OK. The Account Aging Report Setup window is displayed.
- By default, the report is set up to be run for all doctors. To run the report for a specific doctor, select the By Doctor option, and use the drop-down list to select the doctor.
- Select the type of accounts you want to include in the report.
- Select the Show Details of Individual Accounts option to list individual accounts on the report and select an option to include addresses or print the accounts in oldest balance order.
- Type the user codes for the accounts you want to include or exclude.
- Click OK.