

# Dental Reports to meet all your practice needs!

## Appointment Daysheet

Appointment Day Sheet for Wednesday February 22, 2006 Report Date: 12/19/2006  
Page 1

Doctor ALL

Appt Time	Name	Insurance(s)	Tot Ins Bal.	Tot Pt Bal.	Due Now	Payment Amt	Payment Method	Notes
8:30 AM	DEES PATRICIA A	AETNA DELTA	1,521.10	1,629.80	1,179.80			New Patient - private pay
10:15 AM	MORRIS DONNA J	DELTA-GA CIGNA	6,613.60	986.16	113.96			initial visit
10:20 AM	WILD DANIEL #30B/31OL	DCAL	589.25	245.75	245.75			re-evaluation of continued care
11:20 AM	APPLETON JR JIMMI	AETNA	5,288.00	411.00	130.00			
12:10 PM	FIZER ROBERT A	DELTA ADI	1,160.00	355.35	355.35			Retainer adjustment
2:15 PM	MILLER NANCY L	ADI BCBS-IL	1,427.00	352.00	590.92			NP referred by Dr. Black
6 Appointments			Grand Total Due Now:		1436.98			

The **Appointment Daysheet** can be accessed from the scheduler, in the **Reports** menu at the top of the screen, **Current Day Appointments, Appointment Daysheet.**

This report gives you the **Appointment Time** for each patient, patient's **Name**, Primary and Secondary **Insurance** Company codes, **Insurance balance**, and **Total Patient Balance**; as well as **Appt Description, Appt Note** or **Patient Note** [which pulls from the patient demographics screen]. Additional columns are added with space for your front desk person to register **Payment Amounts** and **Payment Methods**.

## Aging Reports

INS BALANCES Aging Report By INS NAME Including Credits  
AGE BASED UPON LAST SUBMITTED

Billing Doctor ALL Report Date: 12/14/2006  
Treating Doctor ALL Page: 1

If there is no date in the treatment start date or a payment has not been made, then the age will be calculated by the Visit Date

Name	Status	Visit Date	Total Bal.	Last Pmt.	Credits	<30	31 - 60	61 - 90	91-120	121-150	Over 150	Total
<b>INS NAME</b> ADI												
MILLER NANCY L	ACTIVE	06/15/06	1,129.00	06/22/06	0.00	100.00	100.00	100.00	100.00	0.00	0.00	400.00
MILLER NANCY L	ACTIVE	11/20/06	250.00		0.00	250.00	0.00	0.00	0.00	0.00	0.00	250.00
ROBINSON JANE	ACTIVE	09/15/06	56.25		0.00	56.25	0.00	0.00	0.00	0.00	0.00	56.25
ROBINSON JANE	ACTIVE	09/21/06	2,475.00		0.00	166.67	166.67	166.67	166.67	0.00	0.00	666.68
WILD DANIEL	ACTIVE	06/20/06	143.60		0.00	0.00	0.00	0.00	0.00	0.00	143.60	143.60
WILD DANIEL	ACTIVE	07/05/06	44.65		0.00	0.00	0.00	44.65	0.00	0.00	0.00	44.65
WILDER GERALDINE	ACTIVE	05/23/06	148.00		0.00	0.00	0.00	0.00	0.00	0.00	148.00	148.00
<b>Subtotal for:</b> ADI			<b>4,246.50</b>			<b>572.92</b>	<b>266.67</b>	<b>311.32</b>	<b>266.67</b>	<b>0.00</b>	<b>291.60</b>	<b>1,709.18</b>

The **Aging Report** can be accessed from **Reports** on the left side of the main screen of PerfectByte under **Financial Reports.**

The Aging Report includes selections for **Ins and Patient ONLY** balances with various aging options for collection purposes.

## Advanced Recall Module

### Step 2. Verify Recalls and Print

These are all the recalls that will be processed. You may remove any undesired claims by tagging and then choosing to remove tagged.

Tag	Created From	Name	Recall Date	Trigger Proc	Last Visit	Trigger Appt	Next Appt	A
	EXISTING RECALL	APPLETON JR JIMMI	12/22/06			12/31/06		1
	EXISTING RECALL	APPLETON JR JIMMI	08/02/06			12/31/06		1
	RECURRING RECA	DEES PATRICIA A	09/13/06			10/20/06		5
	RECURRING RECA	FIZER ROB	09/15/06			10/30/06		5
	EXISTING RECALL	MILLER NANCY L	05/30/06			10/31/06		3
	RECURRING RECA	SMITH PATRICIA	06/01/06					7

Located under **Report>Patient Reports**

Pull recalls based on a variety of criteria including **Individual** or **Recurring Recalls**, by **Patient Appts**, or **Last Visit/Procedure**. You'll never miss another recall with this comprehensive recall module. Prints a report, recall cards and/or labels as desired.

## Referring Doctor Reports

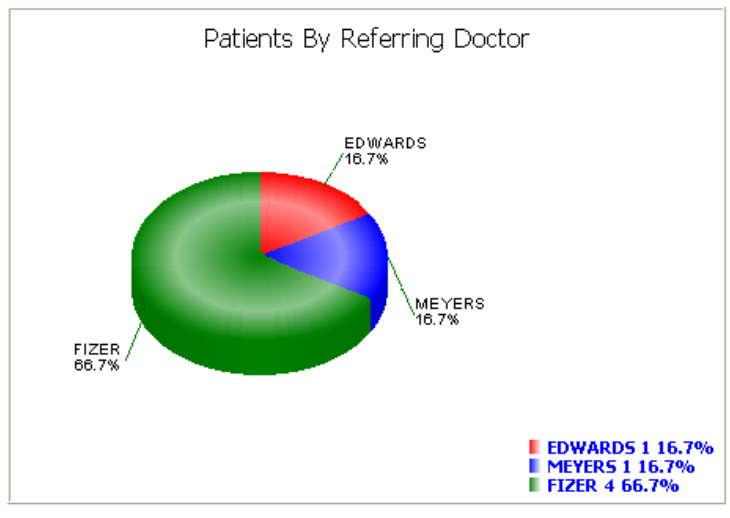
Referring Doctor Frequency Report For Dates 08/01/2006 through 12/14/2006				Report Date: 12/14/2006		Page 1	
Referring Doctor Name	Code	Pt Status	Visit Date	Total	Patient Insurance	Expected	
Referring Doctor: FIZER							
APPLETON JR JIMMI	D1310	DELAYED	08/02/2006	50.00	10.00	40.00	0.00
APPLETON JR JIMMI	BIO	DELAYED	08/04/2006	1,500.00	500.00	1,000.00	80.00
APPLETON JR JIMMI	BIO	DELAYED	10/04/2006	5,000.00	5,000.00	0.00	80.00
APPLETON JR JIMMI	D2161	DELAYED	10/04/2006	600.00	120.00	480.00	0.00
DEES PATRICIA A	D0001	RET	08/29/2006	75.00	15.00	60.00	50.00
DEES PATRICIA A	D2391	RET	08/31/2006	200.00	40.00	160.00	0.00
DEES PATRICIA A	D2140	RET	08/31/2006	500.00	100.00	400.00	0.00
DEES PATRICIA A	D8080	RET	11/03/2006	250.00	50.00	200.00	0.00
DEES STEPHEN L	BIO		12/12/2006	100.00	0.00	100.00	80.00
<b>Total for</b>	<b>FIZER</b>		<b>9</b>	<b>8,275.00</b>	<b>5,835.00</b>	<b>2,440.00</b>	<b>290.00</b>

The **Referring Doctor Frequency Report** is located under Reports, Financial Reports and shows you frequency and revenue generated for selected referring doctors and allows you to select specific CDT codes, statuses and more.

You can also run a **Patients by Referring Doctor** Report, located in Administrative reports. This report displays all patients and the number of patient entered in to PerfectByte for the selected referring doctor.

Or select **Patients by Referring Doctor** under **Charts and Graphs** for a quick visual reference.

### Charts and Graphs Reports



These are just some of reports available in PerfectByte designed to help your office run efficiently. Please feel free to contact PerfectByte Support with any questions. 877.767.7007