



Introduction to Denticon - Clinical

End of Day Reporting



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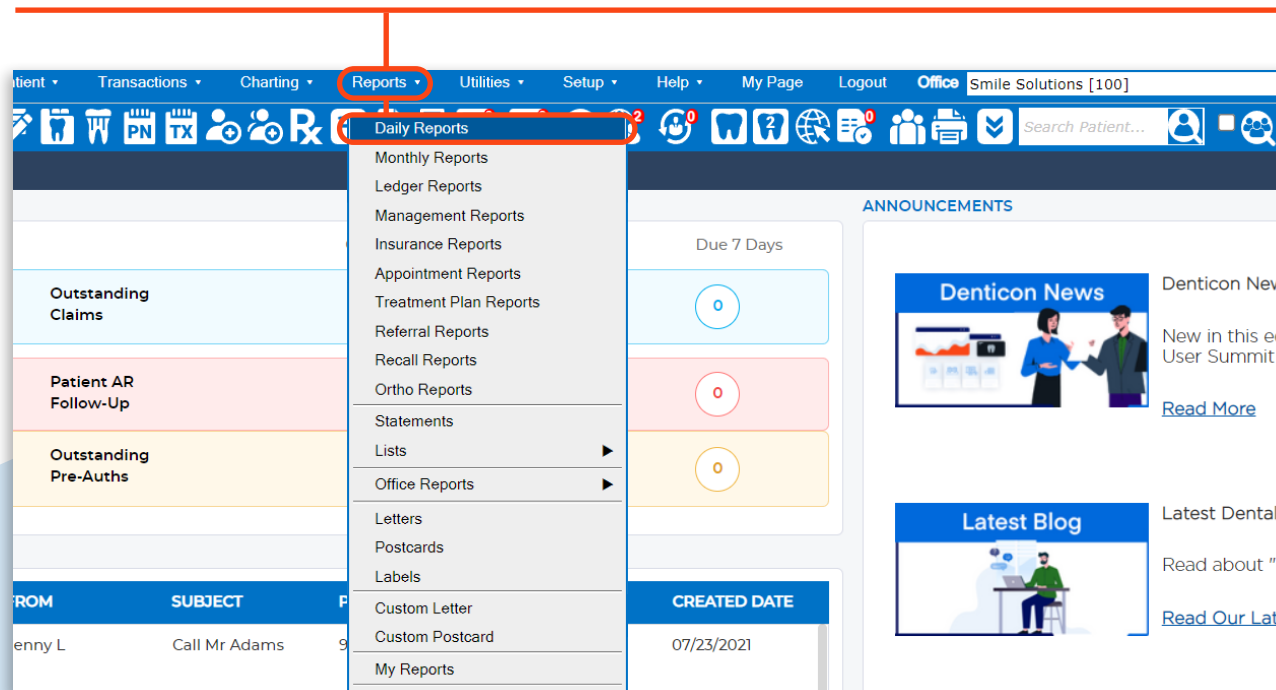


Running a Daily Audit Report

The Daily Audit report allows identification of patients who have appointments, but are missing ledger transactions, progress notes, or provider signatures on a progress note.

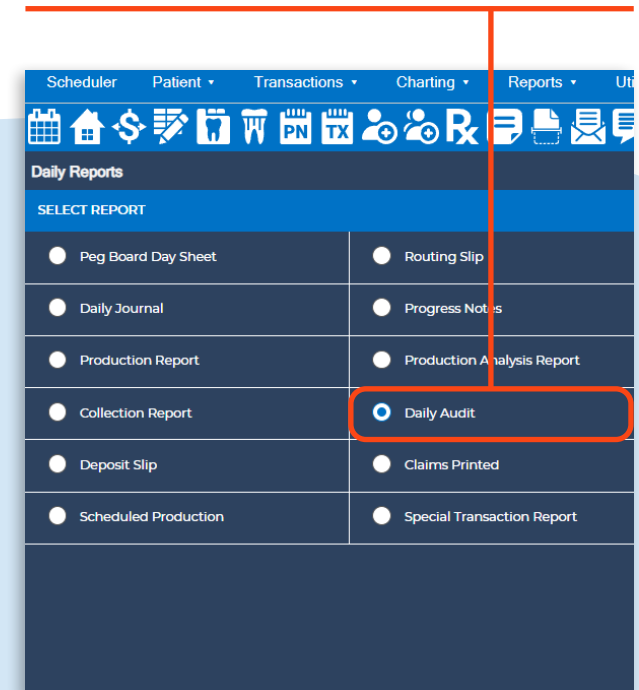
Step 1

From the toolbar, click **Reports** and select **Daily Reports** from the dropdown menu.



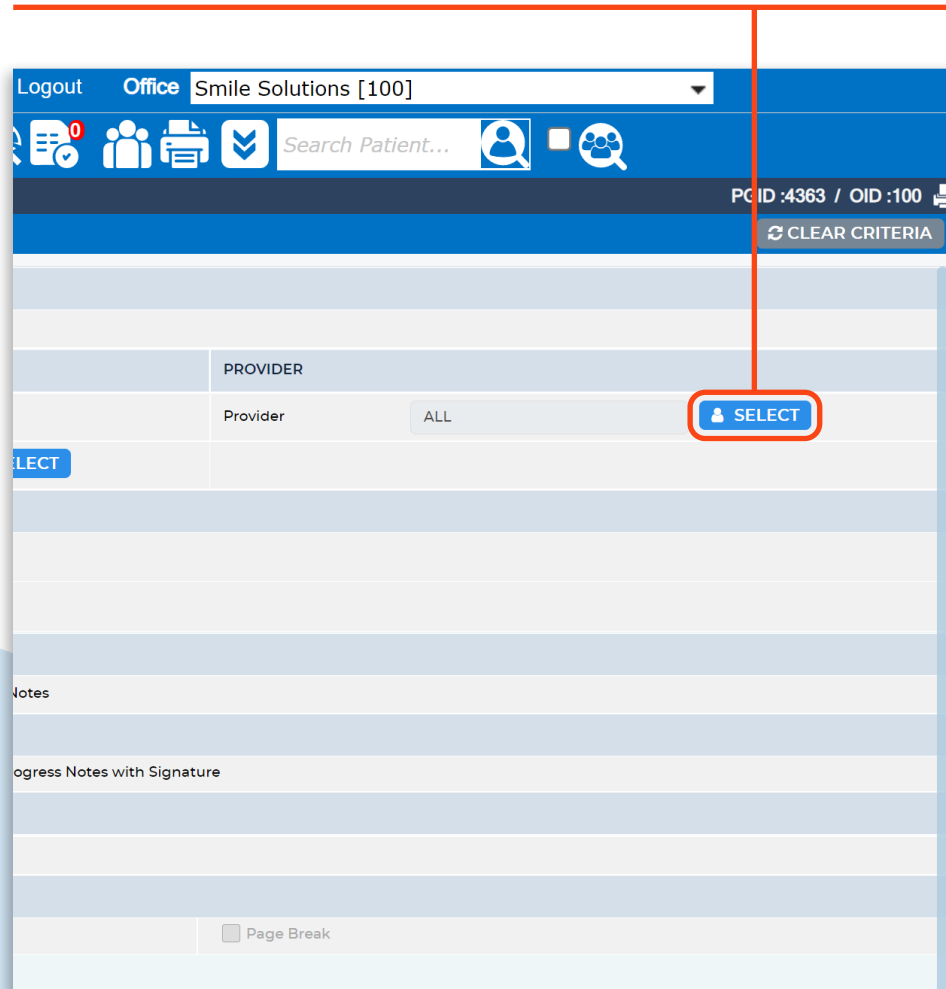
Step 2

Under the Select Report section, choose **Daily Audit**.



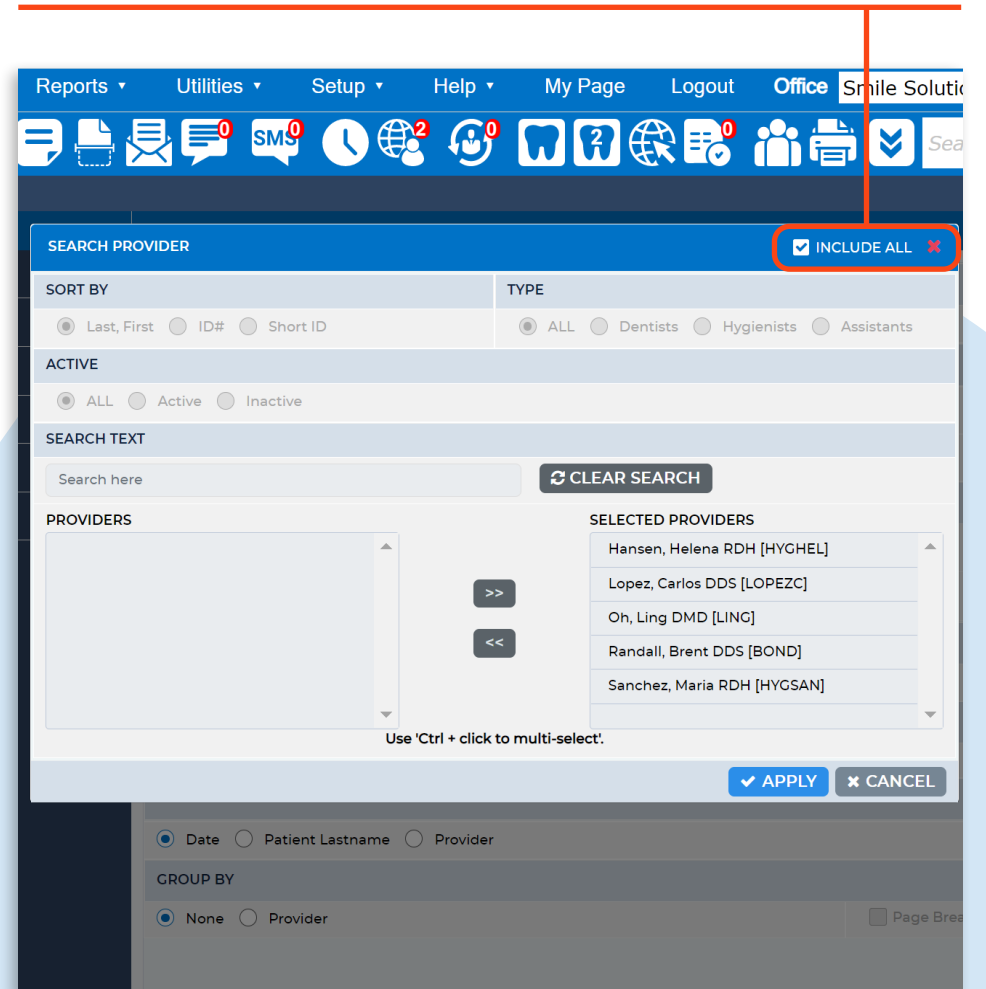
Step 3

Search for a specific Provider by clicking **Select** to open a pop-out window.



Step 4

Uncheck the **Include All** box.



Step 5

Search for a Provider by entering a name into the **Search Text** field, or choose from the Providers list. Then click the **arrows** to add the Provider to the Selected Providers box.

Note: To choose multiple Providers, hold the **ctrl** key when making a selection.

Step 6

Click **Apply**.

The screenshot displays the Denticon software interface. A 'SEARCH PROVIDER' dialog box is open, allowing users to search for providers. The dialog includes a 'SEARCH TEXT' field, a list of providers (Hansen, Helena RDH [HYGHEL], Lopez, Carlos DDS [LOPEZC], Oh, Ling DMD [LING], Randall, Brent DDS [BOND], Sanchez, Maria RDH [HYGSAN]), and a 'SELECTED PROVIDERS' box. Red boxes highlight the search text field, the provider list, the right arrow button, and the 'APPLY' button. The background shows the 'Daily Reports' section with various report options like 'Peg Board Day Sheet', 'Routing Slip', 'Daily Journal', etc.

Note: Other search criteria include whether a patient has or is missing: an appointment, a transaction in ledger, progress notes, or progress notes without a signature. These can be sorted by a patient's last name or provider, and grouped by provider. The **Denticon recommended search criteria** is: the patient has an appointment; but is missing a transaction in ledger, progress notes, and progress notes with a signature; and is grouped by provider.

Step 7

Once the criteria is set, click **Print / Preview** to view the report.

Setup Help My Page Logout Office Smile Solutions [100]

PGID :4363 / OID :100

REPORT CRITERIA CLEAR CRITERIA

PRINT FORMAT
 PDF Excel

OFFICE/GROUP
 Office Office Group
100 SELECT

PROVIDER
Provider ALL SELECT

DATE RANGE
Start Date 09/01/2022 End Date 09/01/2022

PATIENT HAS
 ALL Appointment Transaction in Ledger Progress Notes

BUT MISSING
 Appointment Transaction in Ledger Progress Notes Progress Notes with Signature

SORT BY
 Date Patient Lastname Provider

GROUP BY
 None Provider Page Break by Provider

PRINT / PREVIEW + ADD TO MY FAVORITES

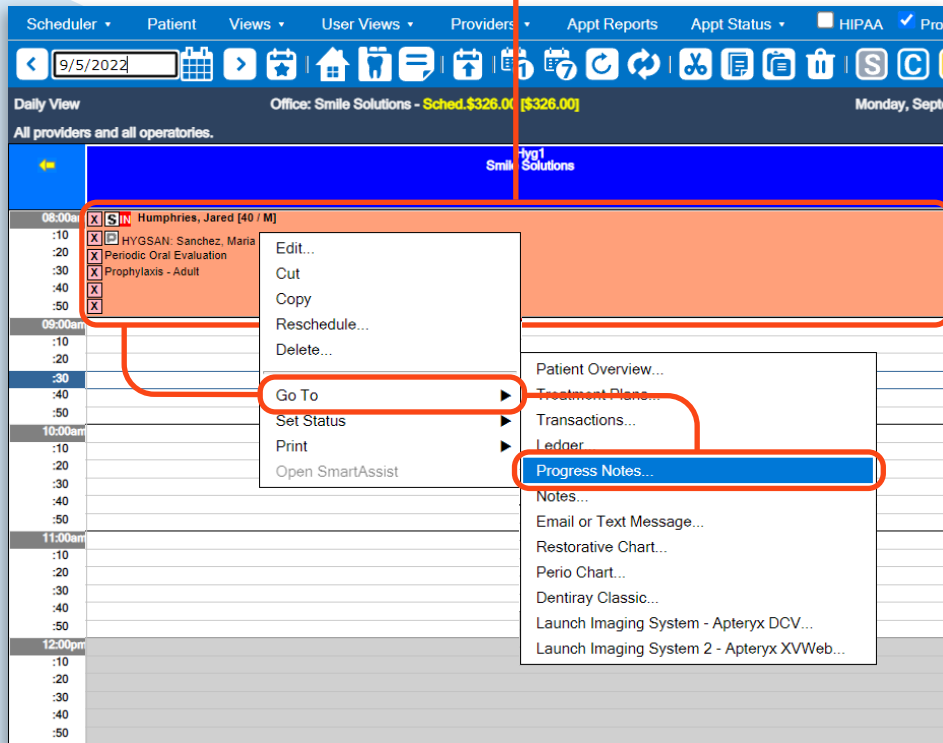
The Daily Audit Report has now been reviewed and any outstanding tasks can be completed.

Note: When reviewing the Daily Audit report, checkmarks represent completed tasks and crosses represent outstanding tasks. Patients will be removed from the report once their outstanding criteria has been satisfied. A blank report means there are no outstanding tasks.

Adding a Signature to a Patient's Progress Notes

Step 1

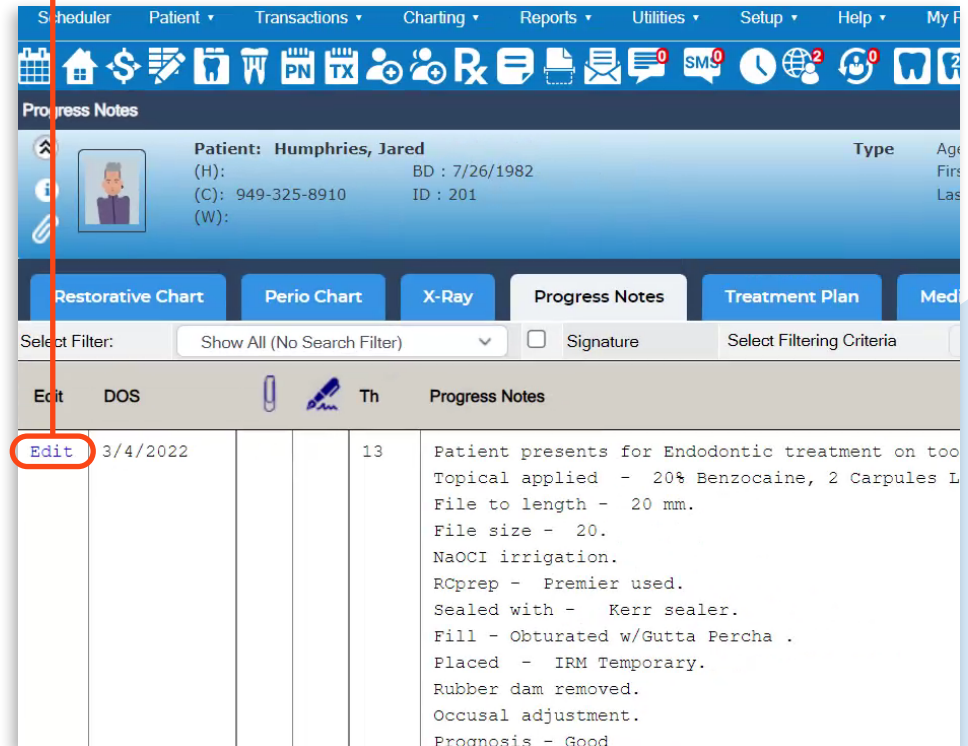
From the Scheduler, select the **patient's appointment block**, hover over **Go To**, then select **Progress Notes**.



Step 2

Click **Edit** under the Edit column on the Progress Note.

Note: A pen will be missing from the signature column, indicating that a signature is required.



Step 3

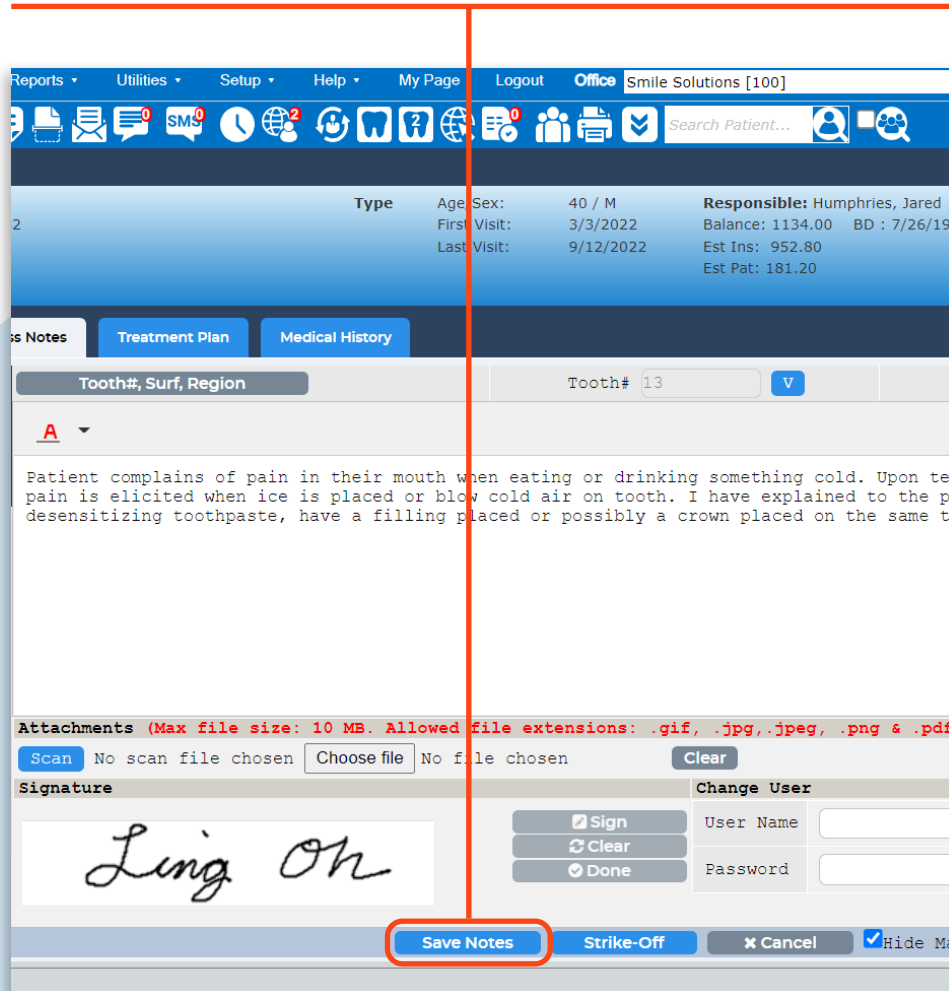
If the provider is the logged in user with a saved signature, click **Load My Signature**.

Note: If another user is logged into Denticon, the provider must enter their User Name and Password prior to selecting Load My Signature. If you do not have a preloaded signature, click **Sign** and use the signature pad to sign the progress note.

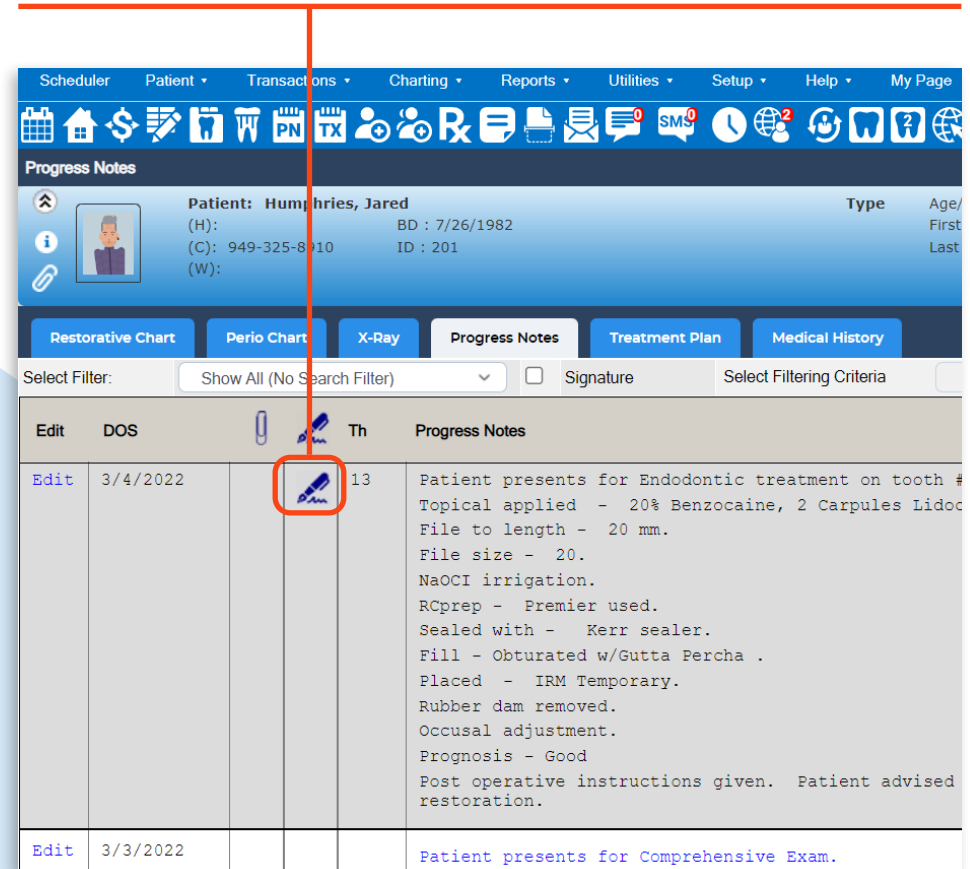
The screenshot displays the Denticon software interface. At the top, there is a navigation bar with various icons and a search bar. Below this, a patient information header shows details for Jared Humphries, including age, sex, and insurance information. The main area is a progress note editor for tooth #13, dated 9/16/2022. The note text describes cold sensitivity and pain. A signature 'Ling Oh' is present in the signature field. A 'Change User' dialog box is open, with 'User Name' and 'Password' fields. The 'Load My Sig.' button in the 'Load Sig. From File' section is highlighted with a red box.

Step 4

Once a signature has been uploaded, click **Save Notes** to update the patient's Progress Notes.



A signature has now been added to the patient's Progress Notes. A pen will appear in the signature column and the Daily Audit Report will be updated.



Note: Once signed, the progress note will be locked and cannot be modified.

Adding a Ledger Transaction

Step 1

Click the **Scheduler** icon in the toolbar.

Patient Overview

Patient Information

Nickname: Garcia, Armando
 Home Office: Smile Solutions
 45239 Peach Tree Road
 Newport Beach, CA 92660
 Patient ID: 135

(H):
 (C): 555-555-5555
 (W):

Birth Date: 2/19/1983
 Age / Sex: 39 / M
 Patient Type: Spanish Speaking
 Patient Note
Medical Alerts: (PT)

Recalls

Code	Interval	RecallDate	Reason	Sch Date	Sch Time
D0210	3 Y + 1D	7/27/2024	Intraoral - Complete Series Of Radiographic Images		
D0120	6 M + 1D	2/27/2023	Periodic Oral Evaluation	8/25/2022	11:00 AM

Appointments

Date	Time	Office	Operatory	Status	Prdr	Len	Last Updated
8/25/2022	11:00 AM	Bri	Hvg1	Scheduled	HYGSAN	60	PDDS4363

Step 2

Select the patient's **appointment block**, right-click, hover over **Go To**, then select **Treatment Plans**.

Scheduler

8/25/2022

Office: Smile Solutions - Sched.\$12335.00 [\$12335.00]

11:00am X|S|IN Garcia, Armando [39 / M]
 :10 X|EN| HYGSAN: Sanchez, Maria
 :20 X|EN| Periodic Oral Evaluation
 :30 X|EN| Prophylaxis - Adult
 :40 X|EN| Bitewings - Four Radiographic Images
 :50 X|EN| Intraoral - Periapical First Radiographic Image

12:00pm
 :10
 :20
 :30
 :40
 :50

01:00pm X|S|IN Cook, Iris [16 / F]
 :10 X|EN| HYGSAN: Sanchez, Maria
 :20 X|EN| Bitewings - Four Radiographic Images
 :30 X|EN| Prophylaxis - Adult
 :40 X|EN| Periodic Oral Evaluation
 :50 X|EN| Intraoral - Periapical First Radiographic Image

02:00pm X|S|OO Everhart, Patrick [48 / M]
 :10 X|EN| HYGSAN: Sanchez, Maria
 :20 X|EN| UL Perio Scaling Root Planing 1-3t Pr Quad
 :30 X|EN| LL Perio Scaling Root Planing 1-3t Pr Quad
 :40 X|EN|
 :50 X|EN|

03:00pm X|S|IN Howard, Steven [42 / M]
 :10 X|EN| HYGSAN: Sanchez, Maria
 :20 X|EN| Periodic Oral Evaluation
 :30 X|EN| Intraoral - Periapical First Radiographic Image
 :40 X|EN| Intraoral - Periapical Each Addl Radiographic Imag
 :50 X|EN| Prophylaxis - Adult

Context Menu:

- Edit...
- Cut
- Copy
- Reschedule...
- Delete...
- Go To
- Set Status
- Print
- Open SmartAssist

Sub-menu for 'Go To':

- Patient Overview
- Treatment Plans...**
- Transactions...
- Ledger...
- Progress Notes...
- Notes...
- Email or Text Message...
- Restorative Chart...
- Perio Chart...
- Dentiray Classic...
- Launch Imaging System - Apteryx DCV...
- Launch Imaging System 2 - Apteryx XVWeb...

Step 3

To add procedures to the ledger, check the **boxes** next to the services provided today, then click **Post to Ledger**.

The screenshot shows the Denticon software interface for a patient named Garcia, Armando. The interface includes a navigation menu at the top with options like Scheduler, Patient, Transactions, Charting, Reports, Utilities, Setup, Help, My Page, Logout, and Office. Below the navigation menu is a toolbar with various icons for patient management and reporting. The patient information section shows the patient's name, type (SS), responsible person (Garcia, Armando), and insurance details. The treatment plan section displays a list of procedures with checkboxes for selection. The 'Post to Ledger' button is highlighted in red. Below the procedure list, there are fields for Diagnosed Date, Tx Plan ID, Phase ID, Order ID, and a dropdown for the provider (LOPEZC : Lopez, Carlos DD). The bottom section shows a grid for adding procedures by category, with options for Diagnostic, Preventive, Restorative, Endodontics, Periodontics, Prosth, remov, Maxillo Prosth, Implant Serv, Prosth, fixed, Oral Surgery, and Orthodontics. The 'Procedures for Diagnostics' section is also visible, showing a list of procedure codes and descriptions.

Diag Date	TID	PID	Ord	Office	St	PS	S	C	Start Dt	End Dt	Code	Th Surf	N	Description	Bill	Dur	F
<input type="checkbox"/>	8/17/2022	1	1	1 Bri	D		S				D0120			Periodic Oral Evaluation	D	0	L
<input type="checkbox"/>	8/17/2022	1	1	1 Bri	D		S				D1110			Prophylaxis - Adult	D	0	L
<input type="checkbox"/>	8/17/2022	1	1	1 Bri	D		S				D0274			Bitewings - Four Radiographic Images	D	0	L
<input type="checkbox"/>	8/17/2022	1	1	1 Bri	D		S				D0220			Intraoral - Periapical First Radiographic Image	D	0	L
<input type="checkbox"/>	8/17/2022	1	1	1 Bri	D		S				D0230			Intraoral - Periapical Each Addl Radiographic Imag	D	0	L
<input type="checkbox"/>	8/17/2022	1	1	1 Bri	D		S				D1206			Topical Application Of Fluoride Varnish	D	0	L

Step 4

From the toolbar, click **Reports** and select **Daily Reports** from the dropdown menu.

The screenshot shows the Denticon software interface. At the top, there is a navigation bar with various icons and a 'Reports' dropdown menu that is currently open. The 'Daily Reports' option is highlighted in the dropdown menu. Below the navigation bar, there is a patient information section for 'Garcia, Armando' with details like phone number and birth date. To the right, there is a summary section showing insurance information and a 'Selected TxPlan Total' of \$0.00. Below this, there is a table with columns for 'Th Surf', 'N', 'Description', 'Bill', 'Dur', 'Prdr', 'Est.Pat', 'Est.Ins', 'Fee D', and 'Tx Counselor'. The table is currently empty. At the bottom, there is a section for 'Procedures for Diagnostics' with a list of procedure codes and descriptions.

Step 5

Under the **Select Report** section, choose **Daily Audit**, set the desired **parameters** and click **Print / Preview** to check that the outstanding criteria has been resolved.

Note: Ideally, a Daily Audit report should be blank at the end of the day.

The screenshot displays the 'Daily Reports' interface in the Denticon software. The 'SELECT REPORT' section on the left lists various reports, with 'Daily Audit' selected. The 'REPORT CRITERIA' section on the right is expanded, showing the following settings:

- PRINT FORMAT:** PDF (selected), Excel
- OFFICE/GROUP:** Office (selected), Office Group
- PROVIDER:** ALL (selected), PROVIDER
- DATE RANGE:** Start Date: 08/26/2022, End Date: 08/26/2022
- PATIENT HAS:** ALL (selected), Appointment, Transaction in Ledger, Progress Notes
- BUT MISSING:** Appointment, Transaction in Ledger (checked), Progress Notes (checked), Progress Notes with Signature (checked)
- SORT BY:** Date (selected), Patient Lastname, Provider
- GROUP BY:** None, Provider (selected), Page Break by Provider (checked)

The 'PRINT / PREVIEW' button is highlighted in the bottom right corner of the 'REPORT CRITERIA' section.

**Smile Solutions
Daily Audit Report**

Office: Smile Solutions

Patients with Appointments:

Appt Date	Pat ID	Name	Last Visit	Pat Type	Provider	Ledger Transaction	Appt	PN	PN With Sig
8/25/2022	135	Garcia, Armando	8/26/2022	SS	HYGSAN	x	✓	x	x
8/25/2022	171	Thomas, Bryan		00	HYGSAN	x	✓	x	x
8/25/2022	120	Cook, Iris		00	HYGSAN	x	✓	x	x
8/25/2022	152	Cohen, Joel	8/25/2022	00	HYGSAN	✓	✓	x	x
8/25/2022	207	Everhart, Patrick	7/15/2022	00	HYGSAN	x	✓	x	x
8/25/2022	126	Benson, Ross	1/1/1900	00	HYGSAN	x	✓	x	x
8/25/2022	188	Johnson, Sally		00	HYGSAN	x	✓	x	x
8/25/2022	178	Howard, Steven	1/1/1900	00	HYGSAN	x	✓	x	x
Total Patients: 8									
Grand Total Patients: 8									

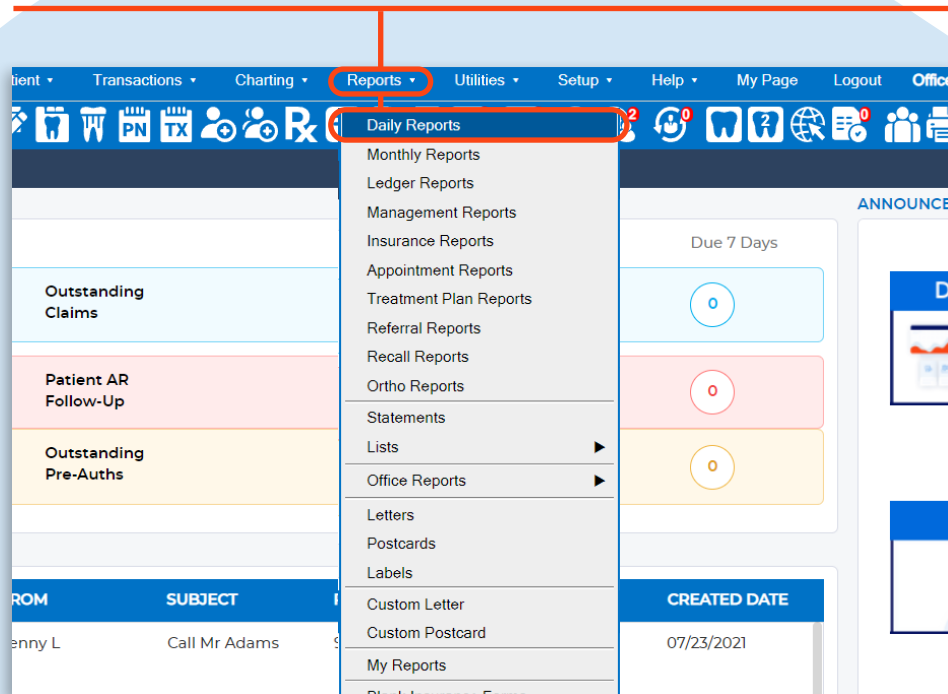
The transactions have now been posted to the ledger and will be updated in the Daily Audit report.

Running a Daily Journal Report

The daily journal report provides a detail or summary of information regarding services, payments and adjustments for a specified date range.

Step 1

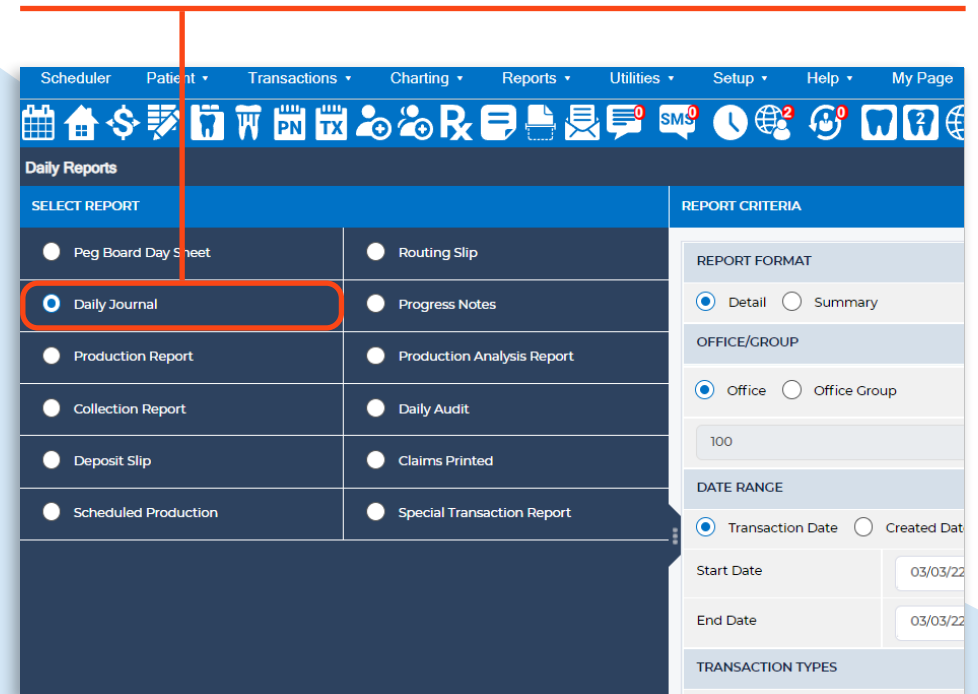
From the toolbar, click **Reports** and select **Daily Reports** from the dropdown menu.



Step 2

Under the Select Report section, choose **Daily Journal**.

Note: In this report, items can be reviewed that have been completed for a particular provider, or for the entire office.



Step 3

Set the **Report Format** to Detail or Summary.

Step 4

Search for a specific Provider by clicking **Select** to open a pop-out window.

The screenshot displays the 'Daily Reports' configuration screen in the Denticon software. The interface includes a top navigation bar with various icons and a search bar. The main content area is divided into two columns: 'SELECT REPORT' and 'REPORT CRITERIA'. The 'REPORT CRITERIA' section contains several fields for configuring the report, including 'REPORT FORMAT', 'PRINT FORMAT', 'OFFICE/GROUP', 'PROVIDER/USER', 'DATE RANGE', 'TRANSACTION TYPES', 'OTHER OPTIONS', and 'GROUP BY'. Red boxes highlight the 'REPORT FORMAT' section, where 'Detail' is selected, and the 'SELECT' button for the 'Provider' field.

SELECT REPORT	
<input type="radio"/> Peg Board Day Sheet	<input type="radio"/> Routing Slip
<input checked="" type="radio"/> Daily Journal	<input type="radio"/> Progress Notes
<input type="radio"/> Production Report	<input type="radio"/> Production Analysis Report
<input type="radio"/> Collection Report	<input type="radio"/> Daily Audit
<input type="radio"/> Deposit Slip	<input type="radio"/> Claims Printed
<input type="radio"/> Scheduled Production	<input type="radio"/> Special Transaction Report

REPORT CRITERIA	
REPORT FORMAT	
<input checked="" type="radio"/> Detail	<input type="radio"/> Summary
PRINT FORMAT	
<input checked="" type="radio"/> PDF	<input type="radio"/> Excel
OFFICE/GROUP	
<input checked="" type="radio"/> Office	<input type="radio"/> Office Group
100	<input type="button" value="SELECT"/>
PROVIDER/USER	
Provider	ALL <input type="button" value="SELECT"/>
User	ALL <input type="button" value="SELECT"/>
DATE RANGE	
<input checked="" type="radio"/> Transaction Date <input type="radio"/> Created Date	
Start Date	03/03/22
End Date	03/03/22
TRANSACTION TYPES	
<input checked="" type="checkbox"/> Services <input checked="" type="checkbox"/> Payments <input checked="" type="checkbox"/> Adjustments	
OTHER OPTIONS	
<input type="checkbox"/> Show AR	
<input type="checkbox"/> Include Resp. Party Type	
<input type="checkbox"/> Show Datewise Summary	
GROUP BY	
<input checked="" type="radio"/> None	<input type="radio"/> Provider <input type="radio"/> User
<input type="checkbox"/> Page Break	

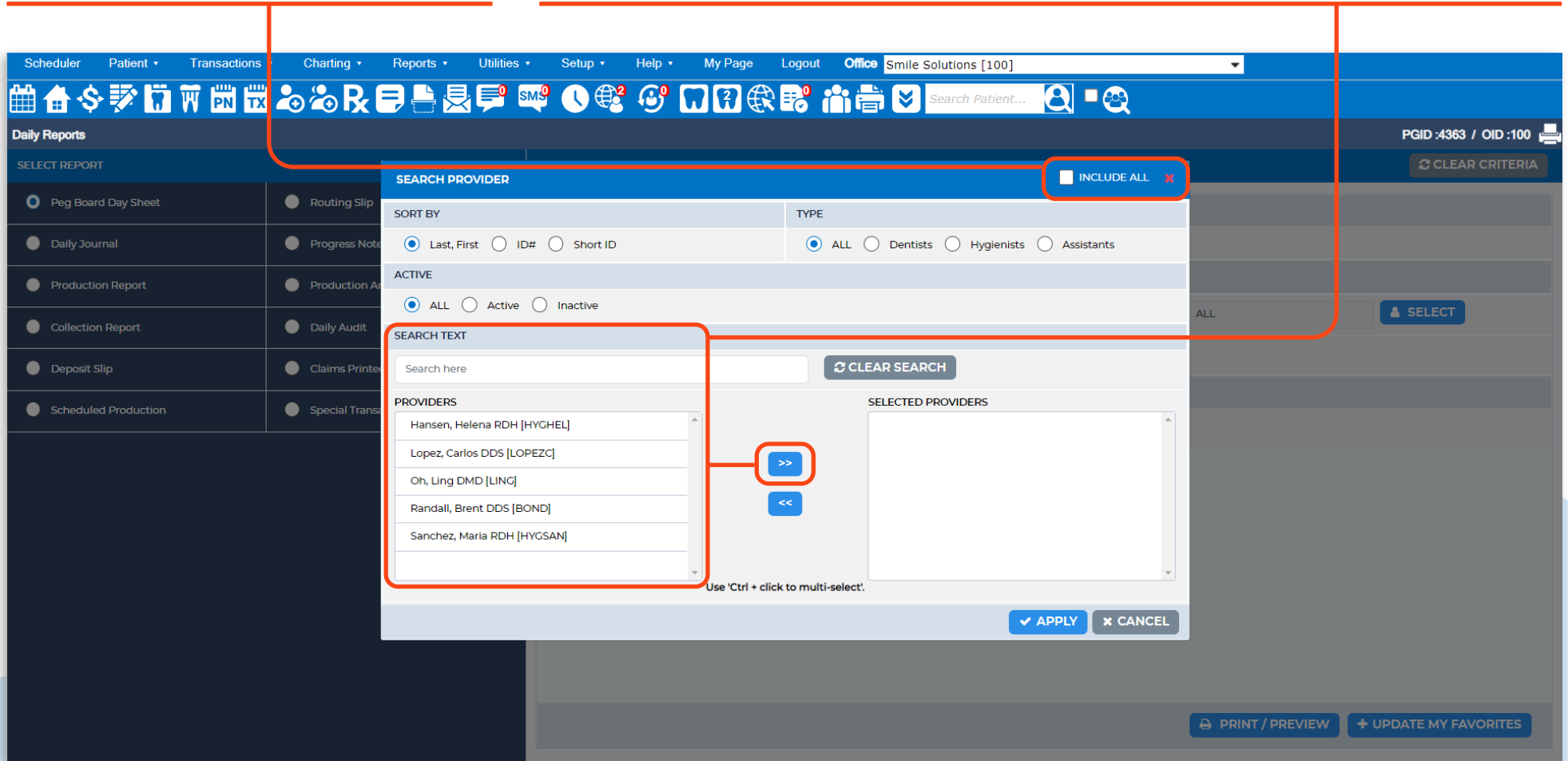
Step 5

Uncheck the **Include All** box.

Step 6

Use the **Search Text** field to look for a Provider; enter the Provider's name, or choose from the Providers list. Then click the **arrows** to add the Provider to the **Selected Providers** box.

Note: To choose multiple Providers, hold the **ctrl** key when making a selection.



Step 7

Click **Apply**.

My Page Logout Office Smile Solutions [100]

Search Patient...

INCLUDE ALL

TYPE

ALL Dentists Hygienists Assistants

CLEAR SEARCH

SELECTED PROVIDERS

>> <<

Use 'Ctrl + click to multi-select'.

Step 8

Add a **Date Range**.

Setup Help My Page Logout Office Smile Solutions [100]

PGID :4363 / DID :100

REPORT CRITERIA CLEAR CRITERIA

REPORT FORMAT	PRINT FORMAT
<input checked="" type="radio"/> Detail <input type="radio"/> Summary	<input checked="" type="radio"/> PDF <input type="radio"/> Excel
OFFICE/GROUP	PROVIDER/USER
<input checked="" type="radio"/> Office <input type="radio"/> Office Group	Provider 105 <input type="button" value="SELECT"/>
100 <input type="button" value="SELECT"/>	User ALL <input type="button" value="SELECT"/>
DATE RANGE	
<input checked="" type="radio"/> Transaction Date <input type="radio"/> Created Date	
Start Date	03/03/22 <input type="button" value="calendar"/>
End Date	03/03/22 <input type="button" value="calendar"/>
TRANSACTION TYPES	
<input checked="" type="checkbox"/> Services <input checked="" type="checkbox"/> Payments <input checked="" type="checkbox"/> Adjustments	
OTHER OPTIONS	
<input type="checkbox"/> Show AR	
<input type="checkbox"/> Include Resp. Party Type	
<input type="checkbox"/> Show Datewise Summary	

Step 9

Select the required **Transaction Types**: Services, Payments, or Adjustments.

Step 10

Choose a **Group By** option.

Step 11

Check the **Page Break by Provider** box to include or exclude a page break.

Step 12

Click **Print / Preview** to view the report.

The screenshot shows the 'Daily Reports' interface with the following details:

- SELECT REPORT:** A list of report options including Peg Board Day Sheet, Daily Journal (selected), Production Report, Collection Report, Deposit Slip, Scheduled Production, Routing Slip, Progress Notes, Production Analysis Report, Daily Audit, Claims Printed, and Special Transaction Report.
- REPORT CRITERIA:**
 - OFFICE/GROUP:** Office selected, Office Group unselected. Value: 100.
 - PROVIDER/USER:** Provider: 105, User: ALL.
 - DATE RANGE:** Transaction Date selected, Created Date unselected. Start Date: 03/03/22, End Date: 03/03/22.
 - TRANSACTION TYPES:** Services, Payments, Adjustments checked.
 - OTHER OPTIONS:** Show AR, Include Resp. Party Type, Show Datewise Summary unselected.
 - GROUP BY:** None unselected, Provider selected, User unselected.
 - Page Break by Provider:** Checked.
- Buttons:** PRINT / PREVIEW and + ADD TO MY FAVORITES.

Note: If the report criteria contains multiple providers, the report can be grouped by provider.

Smile Solutions
Daily Journal - Detail
 Grouped by Provider

Office : Smile Solutions

Pat ID/ Chart #	Patient Name	Prdr	Code	Description	Th	Surf	UCR	Charges	Payment	Adjust	User
Provider : Oh, Ling DMD : LING											
Transaction Date: 3/3/2022											
201	Humphries, Jared	LING	D2950	Core Buildup, Including Any Pins When Required	13		347.00	347.00			JENNYL MS
Total for, 3/3/2022							347.00	347.00	0.00	0.00	
Total For Provider : Oh, Ling DMD : LING								347.00	347.00	0.00	0.00

Summary for Provider : Oh, Ling DMD : LING

	<u>Est. Pat.</u>	<u>Est. Ins.</u>	<u>Total</u>
Charges			
Services	173.50	173.50	347.00
Total Charges :	173.50	173.50	347.00

Summary for Smile Solutions

	<u>Est. Pat.</u>	<u>Est. Ins.</u>	<u>Total</u>
Charges			
Services	173.50	173.50	347.00
Total Charges :	173.50	173.50	347.00

Grand Total :	347.00	0.00	0.00
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Grand Total Summary :

	<u>Est. Pat.</u>	<u>Est. Ins.</u>	<u>Total</u>
Charges			
Services	173.50	173.50	347.00
Total Charges :	173.50	173.50	347.00

The Daily Journal Report now displays all transactions for procedures posted during the chosen dates and can be used to review completed or missing services and duplicate charges.

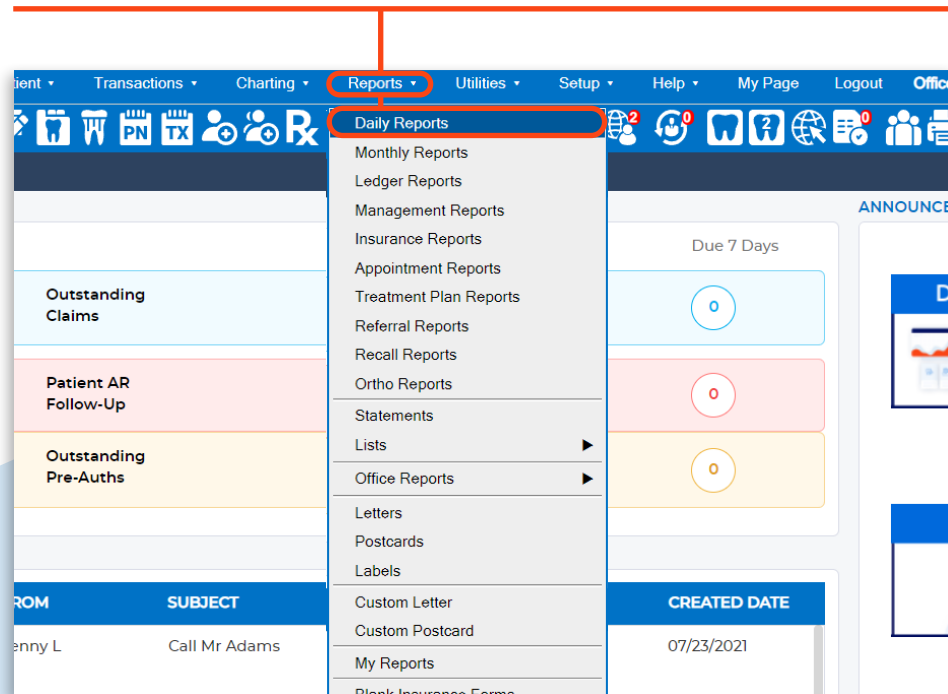
Note: The report shows the patient's name, the providers name, a description of the patient's procedure, tooth number, surfaces (where applicable), and the team member who posted the item. The total charges appear at the bottom of the report for the requested dates.

Running a Production Report

The Production Report provides a detail or summary of services by code, provider, category or insurance carrier for a specified date range.

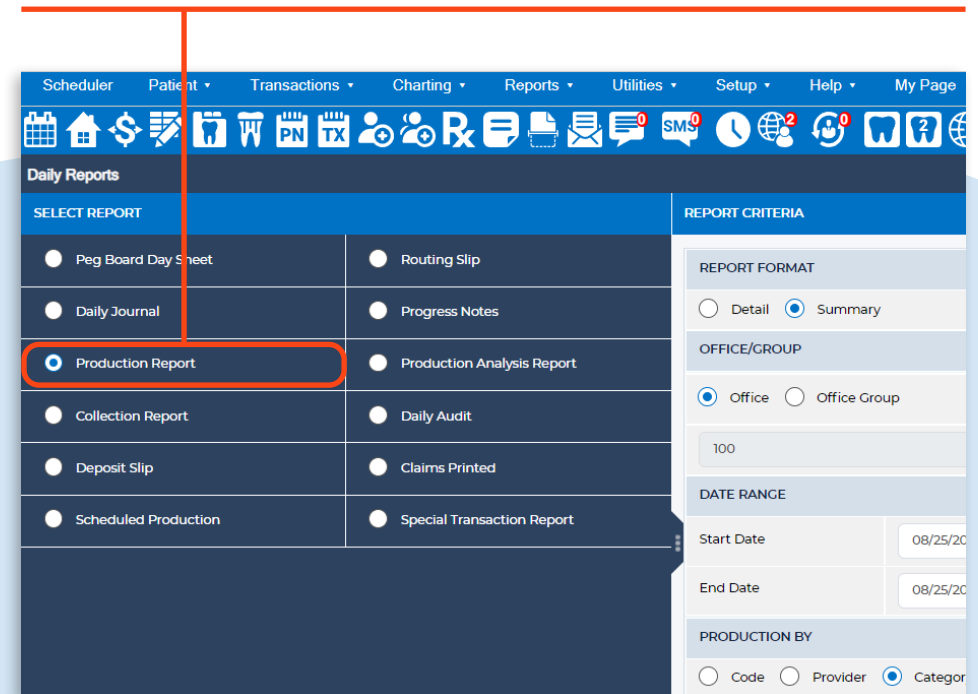
Step 1

From the toolbar, click **Reports** and select **Daily Reports** from the dropdown menu.



Step 2

Under the Select Report section, choose **Production Report**.



Step 3

Set the **Report Format** to Detail or Summary.

Step 4

Add a **Date Range**.

The screenshot displays the 'Daily Reports' section of the Denticon software. The interface is divided into several sections:

- Navigation Bar:** Includes menu items like Scheduler, Patient, Transactions, Charting, Reports, Utilities, Setup, Help, My Page, Logout, and Office (Smile Solutions [100]).
- REPORT CRITERIA:** This section is highlighted with a red box and contains:
 - REPORT FORMAT:** Radio buttons for 'Detail' (selected) and 'Summary'.
 - PRINT FORMAT:** Radio buttons for 'PDF' (selected) and 'Excel'.
 - OFFICE/GROUP:** Radio buttons for 'Office' (selected) and 'Office Group'. Below is a dropdown menu showing '100' and a 'SELECT' button.
 - DATE RANGE:** A section highlighted with a red box containing:
 - Start Date:** 08/25/2022
 - End Date:** 09/16/2022
 - PRODUCTION BY:** Radio buttons for 'Code', 'Provider', 'Category' (selected), and 'Carrier'.
 - GROUP BY:** Radio buttons for 'None', 'Provider' (selected), and 'Carrier'. A checkbox for 'Page Break by Provider' is also present.
 - CATEGORIES:** A dropdown menu showing 'ALL' and a 'SELECT' button.
 - PROVIDERS:** A dropdown menu showing '108' and a 'SELECT' button.
- Buttons:** At the bottom right, there are buttons for 'PRINT / PREVIEW' and '+ UPDATE MY FAVORITES'.

Step 5

Filter **Production** by Code, Provider, Category, or Carrier.

Step 6

Choose a **Group By** option.

Step 7

To filter further, click **Select** to open a pop-out window.

The screenshot shows the 'Daily Reports' section of the Denticon software. The 'SELECT REPORT' panel on the left has 'Production Report' selected. The 'REPORT CRITERIA' panel on the right is active, showing options for 'REPORT FORMAT' (Detail selected), 'OFFICE/GROUP' (Office selected), 'DATE RANGE' (Start Date: 08/25/2022, End Date: 09/16/2022), 'PRODUCTION BY' (Category selected), 'GROUP BY' (Provider selected), and 'CATEGORIES' (ALL selected). A 'SELECT' button is highlighted with a red box and a line pointing to it from the text in Step 7. Other red boxes highlight the 'Category' and 'Provider' radio buttons in the 'PRODUCTION BY' and 'GROUP BY' sections, with lines pointing to the text in Step 5 and Step 6 respectively. A 'CLEAR CRITERIA' button is visible in the top right of the criteria panel. At the bottom right, there are buttons for 'PRINT / PREVIEW' and 'UPDATE MY FAVORITES'.

Step 8

Uncheck the **Include All** box.

Step 9

Search for a Provider by entering a name into the **Search Text** field, or choose from the Providers list. Then click the **arrows** to add the Provider to the Selected Providers box.

The screenshot displays the 'SEARCH PROVIDER' dialog box within the denticon application. The dialog is overlaid on the 'Daily Reports' section of the main interface. The dialog includes the following elements:

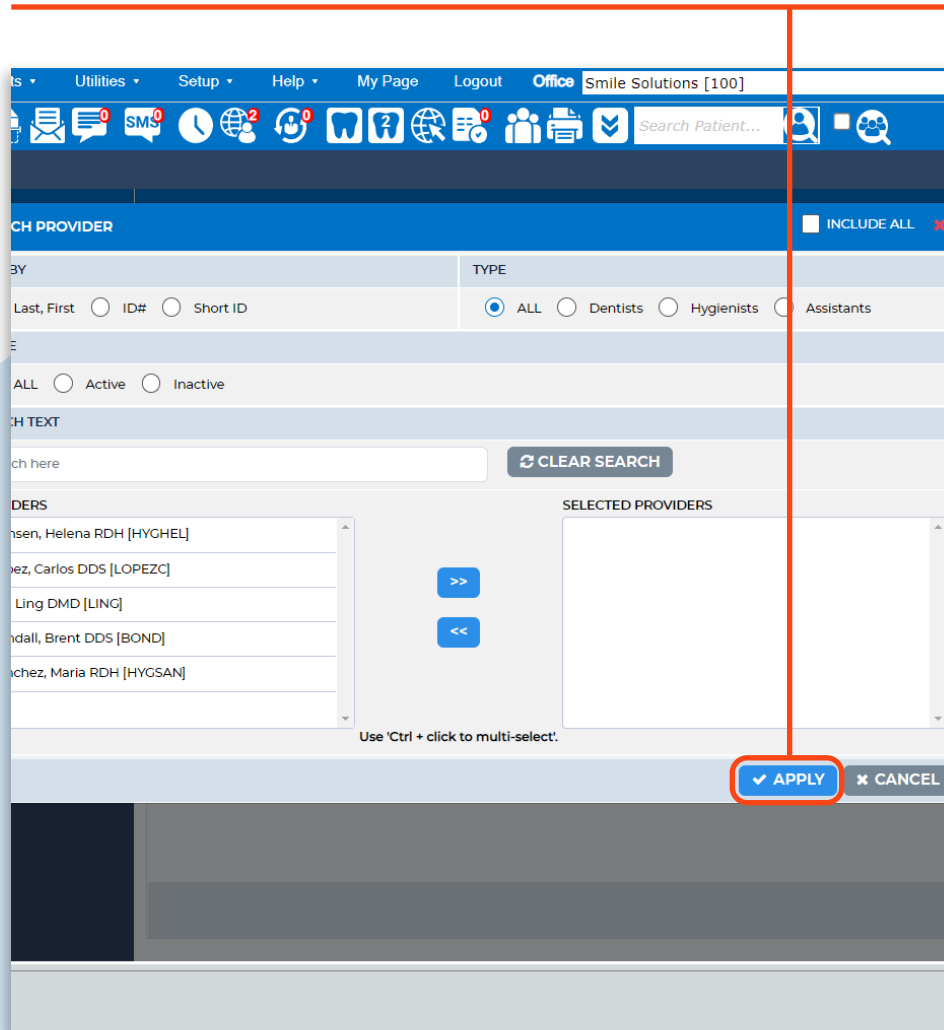
- INCLUDE ALL** checkbox: Located in the top right corner of the dialog, highlighted with a red box.
- SEARCH TEXT** field: A text input field with a 'CLEAR SEARCH' button to its right.
- PROVIDERS** list: A list of provider names with their IDs in brackets, including Hansen, Lopez, Oh, Randall, and Sanchez.
- SELECTED PROVIDERS** list: An empty list box for the selected providers.
- Navigation arrows**: A right-pointing arrow (>) and a left-pointing arrow (<) are positioned between the two lists, with the right arrow highlighted by a red box.
- Buttons**: 'APPLY' and 'CANCEL' buttons are located at the bottom of the dialog.

The background interface shows the 'Daily Reports' section with a 'SELECT REPORT' area containing options like 'Peg Board Day Sheet', 'Daily Journal', 'Production Report', 'Collection Report', 'Deposit Slip', and 'Scheduled Production'. The top navigation bar includes 'Scheduler', 'Patient', 'Transactions', 'Charting', 'Reports', 'Utilities', 'Setup', 'Help', 'My Page', 'Logout', and 'Office'.

Note: To choose multiple Providers, hold the **ctrl** key when making a selection.

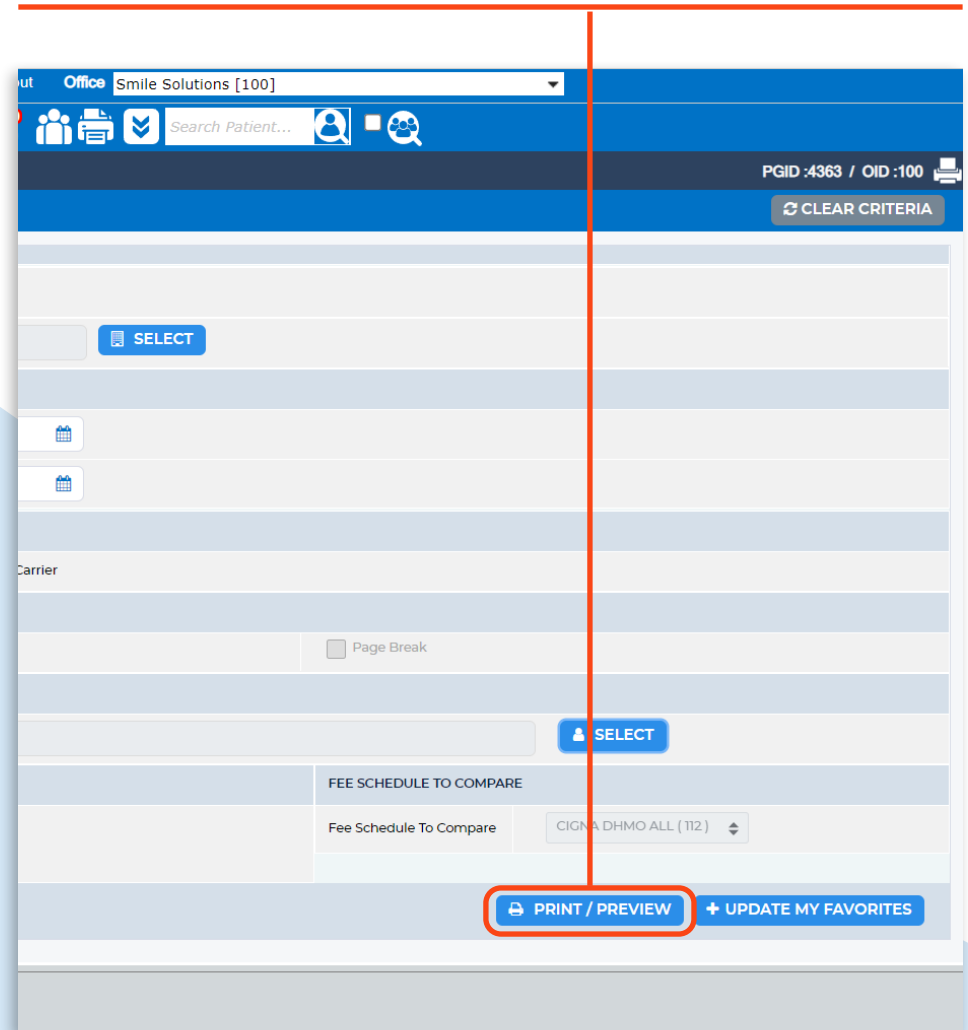
Step 10

Click **Apply**.



Step 11

Click **Print / Preview** to view the report.



**Smile Solutions
Production by Codes**

Grouped by Provider

Office : Smile Solutions

Code	Description	#Perf	Charges	\$ Avg	Total Dur. (Units)	Avg. Dur. (Units)	Eff. Rate \$	Per %
Provider : Oh, Ling DMD : LING								
D2392	Resin Composite Two Surfaces P...	1	231.00	231.00	0.00	0.00	231.00	9.99%
D2740	Crown Porcelain/Ceramic	1	1,020.00	1,020.00	0.00	0.00	1,020.00	44.12%
D2950	Core Buildup, Including Any Pl...	1	255.00	255.00	0.00	0.00	255.00	11.03%
D3320	Endodontic Therapy, Premolar T...	1	806.00	806.00	0.00	0.00	806.00	34.86%
ZD0102	Deliver Partial - Upper	1	0.00	0.00	0.00	0.00	0.00	0.00%
Total for, Oh, Ling DMD : LING [5] :		5	2,312.00	462.40	0.00	0.00	2,312.00	100.00%
Total Production Adjustments :			0.00					
Total for, Smile Solutions [5] :		5	2,312.00	462.40	0.00	0.00	2,312.00	
Total Production Adjustments :			0.00					

The Production Report can now be reviewed to check how many patient services were performed, total charges for the category or service, and the average amount produced per category or service.

Adding Reports to My Favorites

Step 1

From the toolbar, click **Reports** and select the desired report from the dropdown menu.

The screenshot displays the Denticon software interface. The top navigation bar includes tabs for Scheduler, Patient, Transactions, Charting, Reports, Utilities, Setup, Help, My Page, Logout, and Office. The Reports tab is highlighted with a red box, and its dropdown menu is open, listing various report categories. A red line connects the Reports tab to the dropdown menu. The main content area is divided into three sections: My Tasks, Announcements, and a central dashboard with a 'Due 7 Days' counter and a 'CREATED DATE' field.

MY TASKS

Task Name
Outstanding Claims
Patient AR Follow-Up
Outstanding Pre-Auths

TICKLER

FROM	SUBJECT
Jenny L	Call Mr Adams

ANNOUNCEMENTS

Due 7 Days

0

0

0

CREATED DATE

07/23/2021

Denticon News Denticon New Features Newsletter
New in this edition: Denticon Changes, Denticon University, Power User Summit 2022
[Read More](#)

Latest Blog Latest Dental Blog
Read about "How DSOs Can Increase Productivity at Dental Practices"
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Support Webinar Upcoming Client Success Webinar
How to Create Managed Care, Medicaid, and Indemnity Insurance Plans and Fee Schedules within Denticon
[Register Now](#)

Step 2

Choose a **Report**, set the **Report Criteria**, then click **Add to My Favorites**.

Note: Only one version of a report can be added to My Favorites. However, once a report is saved, it can be modified using the Update My Favorites button.

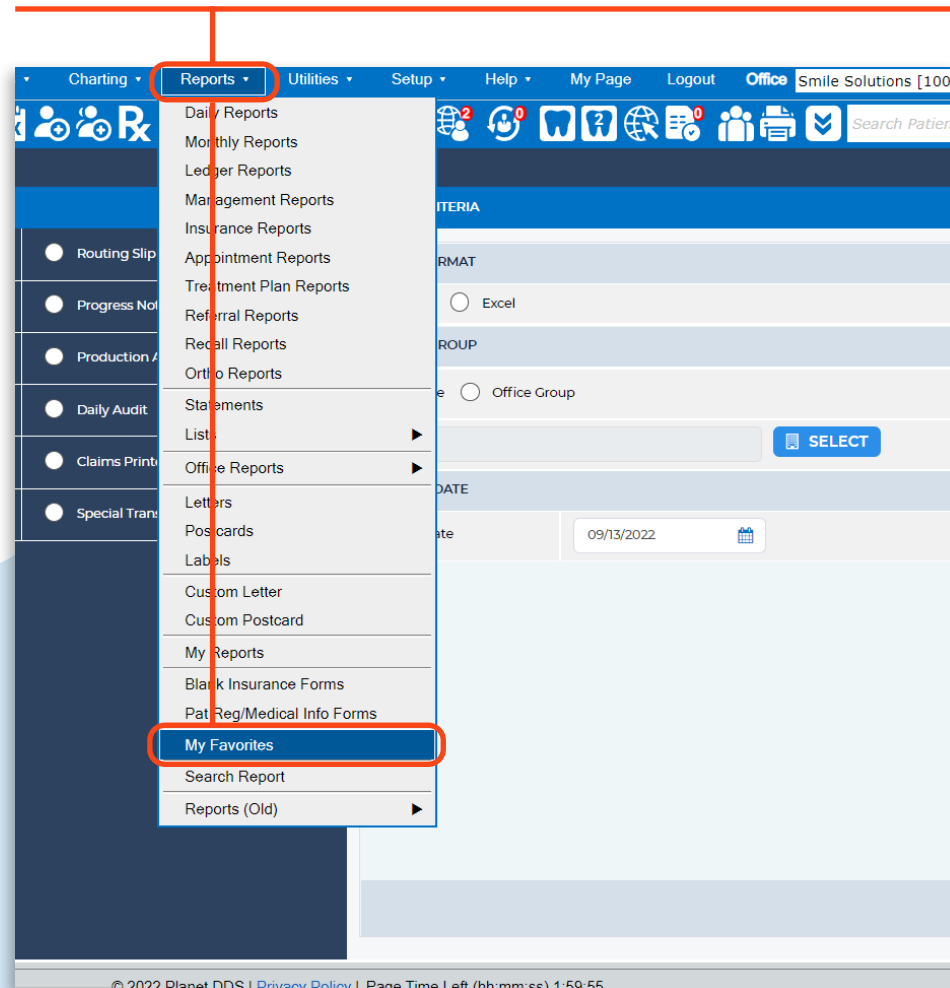
The screenshot displays the 'Daily Reports' interface in the Denticon software. The top navigation bar includes menus for Scheduler, Patient, Transactions, Charting, Reports, Utilities, Setup, Help, My Page, Logout, and Office (Smile Solutions [100]). A search bar for patients is also present. The main content area is divided into two panels:

- SELECT REPORT:** A grid of report options with radio buttons. The 'Daily Audit' option is selected.
- REPORT CRITERIA:** A configuration panel with a 'CLEAR CRITERIA' button. It includes sections for:
 - PRINT FORMAT:** Radio buttons for PDF (selected) and Excel.
 - OFFICE/GROUP:** Radio buttons for Office (selected) and Office Group. A dropdown menu shows '100' with a 'SELECT' button.
 - PROVIDER:** A dropdown menu showing 'ALL' with a 'SELECT' button.
 - DATE RANGE:** Fields for Start Date (09/01/2022) and End Date (09/01/2022), each with a calendar icon.
 - PATIENT HAS:** Radio buttons for ALL (selected), Appointment, Transaction in Ledger, and Progress Notes.
 - BUT MISSING:** Checkboxes for Appointment (unchecked), Transaction in Ledger (checked), Progress Notes (checked), and Progress Notes with Signature (checked).
 - SORT BY:** Radio buttons for Date (selected), Patient Lastname, and Provider.
 - GROUP BY:** Radio buttons for None and Provider (selected). A checkbox for 'Page Break by Provider' is checked.

At the bottom right, there are two buttons: 'PRINT / PREVIEW' and '+ ADD TO MY FAVORITES'. A red box highlights the '+ ADD TO MY FAVORITES' button.

Step 3

To view and use the saved report, from the **Reports** dropdown menu in the toolbar, click **My Favorites**.



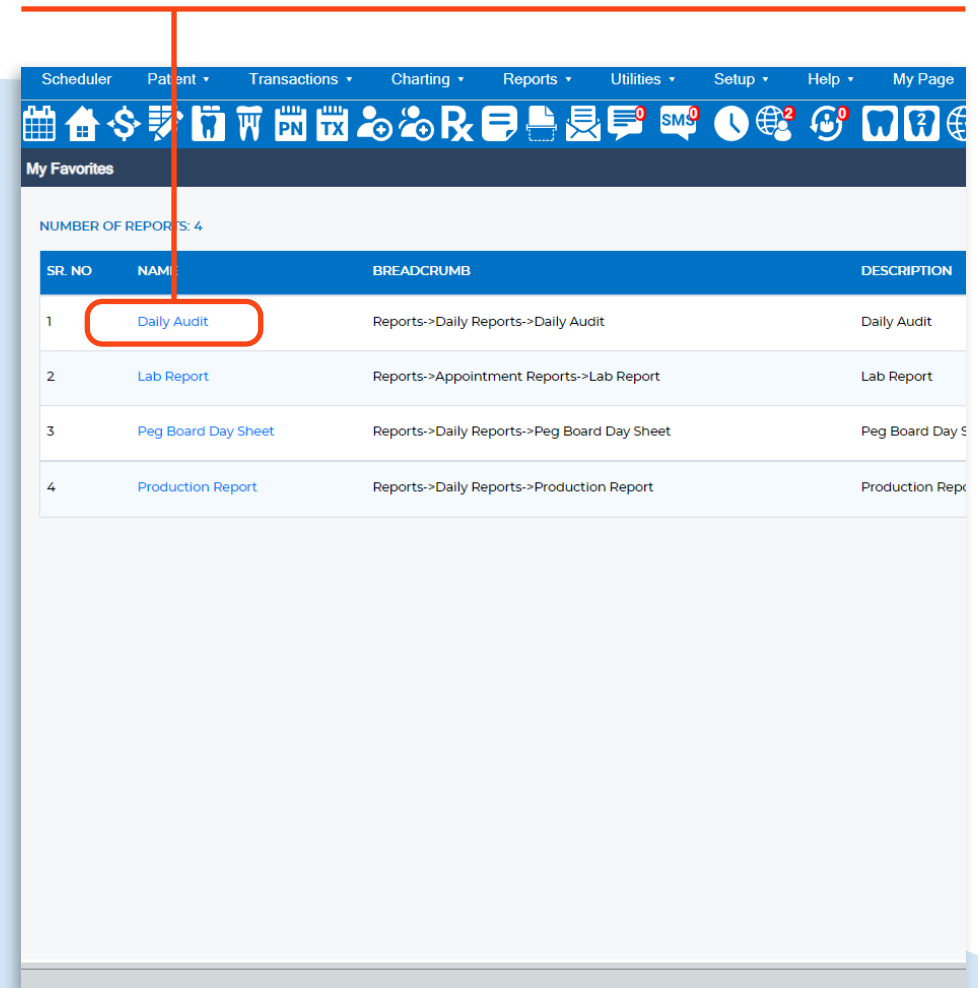
The screenshot shows the 'Reports' dropdown menu with the following items:

- Daily Reports
- Monthly Reports
- Ledger Reports
- Management Reports
- Insurance Reports
- Appointment Reports
- Treatment Plan Reports
- Referral Reports
- Recall Reports
- Ortho Reports
- Statements
- List
- Office Reports
- Letters
- Postcards
- Labels
- Custom Letter
- Custom Postcard
- My Reports
- Blank Insurance Forms
- Pat Reg/Medical Info Forms
- My Favorites**
- Search Report
- Reports (Old)

The 'My Favorites' option is highlighted with a red box. A red line connects this box to the 'Daily Audit' report in the next screenshot.

Step 4

To open the saved Report Criteria, click the **name of the report** highlighted in blue.



The screenshot shows the 'My Favorites' section with a table of report criteria. The 'Daily Audit' report is highlighted in blue.

SR. NO	NAME	BREADCRUMB	DESCRIPTION
1	Daily Audit	Reports->Daily Reports->Daily Audit	Daily Audit
2	Lab Report	Reports->Appointment Reports->Lab Report	Lab Report
3	Peg Board Day Sheet	Reports->Daily Reports->Peg Board Day Sheet	Peg Board Day Sheet
4	Production Report	Reports->Daily Reports->Production Report	Production Report

The 'Daily Audit' report name is highlighted with a red box. A red line connects this box to the 'My Favorites' option in the previous screenshot.

Step 5

Click **Print / Preview** to view the report.

The screenshot shows the 'REPORT CRITERIA' section of the Denticon software. The interface includes a top navigation bar with 'Utilities', 'Setup', 'Help', 'My Page', 'Logout', and 'Office Smile Solutions [100]'. Below this is a search bar and a 'Search Patient...' field. The 'REPORT CRITERIA' section is divided into several sections: 'PRINT FORMAT' with radio buttons for 'PDF' (selected) and 'Excel'; 'OFFICE/GROUP' with radio buttons for 'Office' (selected) and 'Office Group', and a 'PROVIDER' section with a dropdown menu showing '105' and a 'SELECT' button; 'DATE RANGE' with 'Start Date' and 'End Date' both set to '09/13/2022'; 'PATIENT HAS' with radio buttons for 'ALL' (selected), 'Appointment', 'Transaction in Ledger', and 'Progress Notes'; 'BUT MISSING' with checkboxes for 'Appointment', 'Transaction in Ledger', 'Progress Notes', and 'Progress Notes with Signature'; 'SORT BY' with radio buttons for 'Date' (selected), 'Patient Lastname', and 'Provider'; and 'GROUP BY'. At the bottom right of the criteria section, there are two buttons: 'PRINT / PREVIEW' (highlighted with a red box) and '+ ADD TO MY FAVORITES'. A 'CLEAR CRITERIA' button is also visible in the top right of the criteria section.

The report has now been accessed from My Favorites.