IIII PLANET Denticon Reporting 101

What reports matter to each staff member in the office. Click the button that matches your role below to get started.

Front Office Staff

Back Office Staff

Clinical Staff

Management/ C-level

Front Office Staff

Report Name	Why Use	Report Parameters
Daily Audit Report Reports > Daily > Daily Audit *Run Daily (End of Day)	Used as daily audit for the office to verify patients that were scheduled had a Ledger Transaction and the patient's appt was not missed/cancelled *Shows transactions that are	Patient Has Appts = checked If not signing Prog Notes, can skip last column on report Sort by Provider
	Ledger Codes	Checkmarks are good, X's are missing.
Daily Journal by Provider - Detail	Check for providers with charges that did not work today	Select "Detail" Exclude Payments, Adjustments are optional
Reports > Daily > Daily Journal	Verify doctors' services are what they would normally perform	Group by Provider or Filter by Provider
*Run Daily (End of Day)	Shows all transcations charged out to the Ledger for each Provider	Click Select > choose the Providers that were ONLY working today.
Deposit Slip Reports > Daily	Verify all cash received is on the report and all checks posted are	Make sure to check the Show Cash box
*Run Daily (End of Day)	on the report as well. Checks/balances for all collections on a daily basis	Select Care Credit, Direct Deposit, Credit Card, Cash, Checks
	Shows all of your collections with subtotals by each category.	Can select each individually if needed for Deposit Slip
Appointment Details Report	If providers are going to use this report to call patients from	Run the report for ALL columns Can include patient phone
Reports > Appointment Reports	home, it will give providers the procedures they were seen for.	numbers.
*Run Daily	Shows all details from existing appointments for given date range.	
Update Patient Insurance (Conversion) List - By Appointment	To make sure that patients have the proper insurance.	Date range that you'd like to run the report for.
Reports > Lists > Patient List	Provides a list of patients that need their insurance updated so	
*Run Daily (2 days prior) *if converted from another software	they can be verified.	
Next Appointment Booked (Excel)	To fill the schedule with future appointments.	Select office and date range.
Reports > Office Reports > [Location Name] Reports > Next Appointment Booked Report (Excel)	Lists which patients received and did not receive next appointment.	

Report Name	Why Use	Report Parameters
Treatment Plan Status - Detail	Find patients to get back onto	Diagnosed Date Range Start /
Reports (old) > Treatment Plan Reports > Treatment	the schedule who have pending treatment.	End. Option to run by Procedur Code as well under "Codes".
Plan Status - Detail	Gives Tx plan status by Patient who has not completed that	Recommended Treatment Plans: Set to "Accepted", then
*Run Daily, Weekly, Monthly	treatment and gives their contact information.	exclude "Completed" and/or "Scheduled". Must be having Denticon users setting Tx plans as "Accepted" in Tx Plan Entry screen
Recall Due/Overdue but Not Scheduled Report	Find patients to get back onto the schedule who are due for	Select Recall Date Range. Be sure to Exclude Scheduled
Reports (old) > Recall Reports > Recall	their recall exams or hygiene appointments.	Appointments. Can select Provider/Hygieinst, particular Recall Procedure Codes, if
*Run Daily	List of all patients that have a Recall Due in that date range	needed.
Null Daily	and do not have one of the Recall Codes scheduled *Please note that if a patient has 2 of 3 Recall Codes scheduled, the patient + unscheduled Recall code will still appear on this report.	*If you leave this area blank, the report will run for ALL Recall Codes.
Appointment Detail	Gain a better understanding of	Appointment Type = Regular
Reports > Appointment Reports > Appointment Detail	your upcoming schedule and where opportunities may lie to perform dentistry.	Run report by Appointment Date range. Can include Patien Phone Numbers
*Run Daily	Provides a list of all non- cancelled appointments.	
Appointment List	Report used to try to get	Select Cancelled List or Missed
Reports > Appointment Reports > Appointment List *Run Daily	patients back on the schedule that have missed or cancelled their appointment(s). Provides patient's contact info to reschedule.	List
Call List	Used to reschedule a patient	Select specified Date Range
Scheduler drop down > Call List	that is either on or off the Call List who has missed or cancelled their appointment(s).	(can use presets (i.e. Last 3 mo) Select a Duration (mins), if applicable
*Run Weekly	Patient information readily S available to reschedule patients S	Select Provider, if applicable Select "Show Cancelled" Select "Show Missed" Select "Show Off Call List"
Scheduled Production	Projects the total estimated	Select office and date range.
Reports > Daily Reports > Scheduled Production	revenue of future days & awareness of slow days to focus on scheduling patients/	
*Run Daily	production. Shows total production dollars on schedule for future dates.	

office. office. Account Balance can b Aging This report allows you to run an Aging report by Responsible Party that includes patient Make sure "Include Bala *Run Daily ble Party that includes patient Make sure "Include Bala Patient Progress Notes To audit and ensure progress Make sure "Include Bala Report > Daily Reports > Progress Notes Select unsigned under Report > Daily Reports > To audit and ensure progress notes Select DOS date range. Progress Notes Lists all patient progress notes Select DOS date range. Report > Daily Reports > report for accuracy. Can select for one locar Progress Notes To generate periodic billing Can select for one locar Reports > Daily Reports > Progress Notes Select Unsigned Progress Notes To generate periodic billing Can select for one locar Run Daily To generate periodic billing Generate Ortho Paymer Charges o Generate Ortho To generate periodic billing Charges or Generate R Utilities > Generate Ortho To generate periodic billing Charges or Generate R Progress Notes Frequent Plans or Gene Charges by Practice-*C	Report Name	Why Use	Report Parameters
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into the practice for a visit	Reports > Appointment Reports	Contains important information	
	*Run Daily (end of day)		

Back Office Staff

Report Name

Daily Audit Report

Why Use

Assistants can make sure all patients that received treatment have signed Progress Notes by Provider.

Checkmarks are good, X's are missing.

Report Parameters

Patient Has Appts = checked Patients Missing Progress Notes and Progress Notes Signed

Sort by Provider

Lab Reports

Reports > Appointment Reports

Reports > Daily > Daily Audit

*Run Daily (end of day)

*Run Daily (2 days out from today)

To follow-up on labs that have not been received, and make sure the labs are present so patients don't need to be cancelled

*Be sure to include the Lab information in the appointment. Otherwise, the Lab Case will not show up on this report. Report Type set to "Not Received" (Lab Not Recevied)

Clinical Staff

Report Name	Why Use	Report Parameters
Daily Journal by Provider - Detail Reports > Daily > Daily Journal	Check for providers with charges that did not work today	Select "Detail"
*Run Daily (end of day)	Verify doctors' services are what they would normally perform.	Exclude Payments, Adjustments are optional
	Shows all transcations charged out to the Ledger for each Provider	Filter by specific Provider
Daily Audit Report	Providers can make sure all	Patient Has Appts = checked
Reports > Daily > Daily Audit	patients that received treatment have signed Progress Notes by	Patients Missing Progress Notes and Progress Notes Signed
*Run Daily (end of day)	Provider. This will allow them to sign any unsigned notes	Sort by Provider. Checkmarks are good, X's are missing.
Lab Reports	To follow-up on labs that have	Report Type set to "Not
Reports > Appointment Reports	not been received, and make sure the labs are present so	Received" (Lab Not Recevied)
*Run Daily (2 days out from today)	patients don't need to be cancelled	Shows all lab cases that have not been received
	*Be sure to include the Lab information in the appointment. Otherwise, the Lab Case will not show up on this report.	
Production by Codes - Provider	Report can be used as a touchpoint for clinical	Select Date Range
Reports (old) > Group Reports > Management Reports >	education.	Can select specific Provider(s) if needed.
Production by Codes - Provider *Run Monthly, Quarterly, Yearly	Report gives you production by code by provider.	
Patient Progress Notes	To audit and ensure progress	Select detail option under
Report > Daily Reports >	notes were correctly entered.	progress notes to print
Progress Notes	Lists all patient progress notes entered for quick review on	Select DOS. Can select for one location or multiple.
Report > Daily Reports > Progress Notes (missing Progress Notes)	report for accuracy.	For Missing Report: Select missing under progress notes to print.
Reports > Daily Reports > Progress Notes (unsigned Progress Notes)		For Unsigned Report: Select unsigned under progress to
*Run Daily		print

Management/ C-Level

Report Name	Why Use	Report Parameters
Daily Journal - Summary Reports > Daily > Daily Journal *Run Daily, Weekly	To give a snapshot of total	Set by Office or by Office Group
	Charges, Payments, Adjustments for a given date range for a	Select "Summary"
	specific office or office group.	
	Shows totals for Charges, Payments, Adjustments charged out to the Ledger.	
Uncollected Co-Pay Report	To make sure the staff is	Financial notes will appear in
Reports > Management reports > Uncollected Co-Pay Report	collecting patient copays on the schedule for today to assist with AR.	the Financial Notes column of the report.
*Run Daily (End of Day Report)	Shows all patients on schedule for today that have a patient balance due (preexisting or balance from today). Includes last Pmt date/amount for the account in addition to the Financial Notes	
Special Transaction Report	Use this report to account for the # of procedure codes done	Sort by Code.
Reports (old) > Group Reports > Daily Reports > Management	for insurance fee negotiations	Example: how many sealants done in the day
reports	Shows all codes done by	·
*Run as needed	Provider, Age for a given date range	Example: to see D0150 codes were charged out for patients from Ages 0-3, as they should be D0145
Treatment Plan Analysis	If actively setting Tx statuses,	Diagnosed Date Range Start /
Reports (old) > Treatment	this will give you a summary for every Tx Status.	End
Plan Reports > Treatment Plan Analysis	Gives count and amount	Use default filter settings
*Run Daily, Weekly, Monthly	of Diagnosed, Alternative,	
	Scheduled, Completed treatments. Gives ratios of	
	Diagnosed Tx to Accepted, Scheduled, and Completed Tx	
ncome Allocation - Summary	If you pay your provider(s) on	Enter in the Pay Period for the
Reports > Monthly Reports >	Collections, please be sure to use this report in Denticon to	Date Range.
Income Allocation - Summary	calculate their compensation.	This will allow you to properly compensate them. Multiply
*Run Monthly	This report gives you the appropriate allocated collection amount for each provider.	the "Income" column by their compensation % to give you their compensation for selected pay period.

Report Name	Why Use	Report Parameters
Waterfall Report Reports > Monthly Reports > WaterFall Report *Run Quarterly & Yearly	To predict collection rates based on collection numbers assocaited to previous months. Help with cash on hand analysis. This report gives a breakdown by Collections for the Date of Service Month ("Service Date" by the specified date range.	Select Office(s) and have the date range be for at least a quarter.
Executive Summary Reports > Monthly Reports > Executive Summary *Run Daily (End of Day), Monthly (End of Month)	To find KPI's on one centralized report for each location. Summary of KPIs (NPs, Production, Collection, Adjustments, Missed Appts, etc.) for a specific date range.	Select Date Range Click "Select" next to the Office OID and then click "Select All" in the next window to run the report for ALL offices.
Aging Report - Detail Reports > Monthly Reports > Aging *Run Daily, Weekly, Monthly	To have staff follow-up on AR for the office. This report allows you to run an Aging report by Responsible Party that includes patient phone number, and balance to collect outstanding AR.	Set Report Format to Detail Account Balance can be set to whatever threshold you want Make sure "Include Balance Status" is selected
Aging Report - Summary Reports > Monthly Reports > Summary *Run Daily, Weekly, Monthly	Snapshot of the organzaitions AR. This report gives you outstanding AR for patient and insurance balances for each office(s) selected.	Set Report Format to Detail Account Balance can be set to whatever threshold you want Make sure "Include Balance Status" is selected Select "Include Credit Balance" to see the true AR for the specified location(s)
Unallocated Payments/ Adjustments Report Reports > Monthly Reports > Unallocated Payments/ Adjustments Report *Run Daily, Weekly, Monthly	For staff to be able to make appropriate adjustments for patient accounts. Report will show you any unallocated Payments and Adjustments for a specific date range to balance your patient ledgers.	Select Date Range Can exclude Credit Balances if needed.
Scheduled Production Reports -> Daily Reports -> Scheduled Production *Run Weekly	Projects the total estimated revenue for upcoming week & awareness of slow days to focus on scheduling patients/ production. Shows total production dollars on schedule for future dates.	Select office and date range.

Report Name	Why Use	Report Parameters
Production by Codes	Can use this report to negotiate fees with Insurance Carriers, as this report will show # of codes rendered and what the charges were for each code.	Select Date Range.
Reports (old) > Group Reports > Management Reports > Production by Codes		Report gives you production by code by office.
*Run Monthly, Quarterly, Yearly		
Production by Codes - Provider	Insight to providers' revenue stream.	Select Date Range
Reports (old) > Group Reports > Management Reports >		Can select specific Provider(s)
Production by Codes - Provider	Report can be used as a touchpoint for clinical education. Report gives you production by code by provider.	if needed.
*Run Monthly, Quarterly, Yearly		
Production by Category	Report can be used to give you a high level overview of how much production each category is bringing in for your organization.	Select Date Range
Reports (old) > Group Reports > Management Reports > Production by Category		Select Categories, if applicable.
*Run Monthly, Quarterly, Yearly	Report gives you production by category for all offices.	