Selling Your Practice - Reporting

You can transfer your EasyDent license to the new practice.

1) 10 Year Graphs (Overview of key statistics for last 10 years)

- Start at *Reports Menu*
- Select “Management Graphs”
- Select “10 Year Graphs” button
- Make sure “Check to Select all Patients Regardless of Insur” is checked
- Click “Extract Data 10 Years” button
- When it finishes running click each button for each category, it will display both a Graph and Dollar values on the same diagram.
  - Charges Graph – Total Charges or Production
  - Payments Graph – Total Payments of all types
  - Adjustments Graph – Amounts discounted due to Insurance EOB or other reasons
  - New Patients Graph – Number of new patients
  - Patient Visits – Number of patient visits

2) Yearly Analysis (breaks down Charges, Payment, & Adjustments by month by type)

- Start at *Reports Menu*
- Select “*Monthly Reports*”
- Click the “*Clear*” button
- Set the Date Range on the top right side i.e. 01012024 & 12312024
  (Note: it reports monthly figures with in a calendar year)
- Check “*Yearly Analysis*” box
- Click the “*Options*” button to the right of the “*Yearly Analysis*” check box
- Click the “*Select for All Patients Regardless of Insurance or Not*”
- Click the “*Save/Exit*” button.
- Press the “*Run Report*” button

3) Accounts Receivable (How much money possible to still collect)

- Start at *Reports Menu*
- Select “*Monthly Reports*”
- Click the “*Clear*” button
- Check box “*Account Aging 30 60 90*”
- Click the “*Options*” button to the right of the “*Account Aging 30 60 90*” check box
- Un-Check all the options
- Check “*Check if Credit Balances are to be Eliminated*”
- Check “*Check if Collection Accounts are to be Eliminated*”
- Check “*Check if No Bill Accounts are to be Eliminated*”
- Fill in *Minimum Balance* of 10.00
- Click “*Save/Exit*” button
- Reply “*Yes*” to “*Would you like to report last payment information?*”
- Press the “*Run Report*” button

Notes: Columns at the right “*Prime*” Primary Carrier Number, “*Sec*” Secondary Carrier.
“Days = xxxx” is the number of days since last payment.

4) Insurance Carrier Payment Analysis (How much each carrier paid)

- Start at *Reports Menu*
- Select "*Management Reports*"
- Click the "*Insurance Plan Analysis*" button
- Set the Date Range, i.e. 01012024   12312024
- Click the "*Run*" button
- Click "*Sort by Amount*" if you desire

5) Number of Patient Seen (**See approximate number of patients seen**)

(If you use the PowerSoftMD Scheduling system)

- Open the *Schedule*
- Select "*Print*" on the top toolbar
- Select "*Count of Scheduled Patients*"
- Set the Desired Date Range, must be within a calendar year
- Select the Schedule Number
- Check "*Select All Patient Regardless of Insur*"
- Keep all Columns Checked
- Click the "*Run*" button

6) Number of Patient Seen (**See approximate number of patients seen**)

(Even, if you **don't use** the PowerSoftMD Scheduling system)

This requires running two separate reports in a specific sequence.

- Start at *Reports Menu*
- Select "*Transaction Ledger Search*"
- Clear "*Clear*" button
- Set the Date Range, i.e. 01012024   12312024
- Check box "*by DOS*" (Date of Service)
- Check box "*Check for All Charges Regardless of ADA Code*"
- Click the "*Run*" button
- Click "*Exit*" button (no need to print)
- Exit back to *Reports Menu*
- Select "*Patient Search by Criteria*"
- Check box "*Use Transaction Acct File*"
- Change "*Patient Status – General Screen*" to "*All*"
- Click the "*Run*" button

Note: Totals on report last page or bottom of second to last page.

7) Practice Analysis (**Additional Practice Management Analysis Reporting**)

- Start at *Reports Menu*
- Select "*Management Reports*"
- Check box "*Zip Codes and Ages, Patients Since*" defaults to last 12 months
- Click the "*Run*" button (Print if desired)
- Back on the "*Management Reports*" menu use all the buttons in the "*Analysis*" Section on the right-hand side.