

## **END OF DAY PROCESS & REPORTS**

### **Hygienist or Assistant**

1. Runs **Production and Audit report** (or **Progress Notes Report**)
2. Reviews actions needed with Dr.  
(This should be done mid-day for AM notes and end of day for PM notes)
3. **Dr. signs** notes and validates accuracy of production
4. **Hyg/Assistant** Re-runs reports to show all final production and ensure completed/signed progress notes

### **PM/FOC**

1. Collects all checks and cash receipts, etc
2. Run the **Daily Journal by Provider**- Detail report to review production
3. Run the **Daily Collection by Provider** – Detail report to review payments
4. Look for variance between system and payments, correct as needed
5. Complete End of Day Summary (internal report)\_to balance amount received and billed
6. Scan Verification sheet, Daily Summary Sheet, Receipts and Cash Slip
7. Saves Scan to appropriate H-Drive folder

### **HOW TO PRINT REPORTS**

**Production Report:** [Reports](#) → [Daily Reports](#) → [Production](#) (allows you to search production and adjustments by date range and payment types, by provider, carrier or ada code.)

**Audit Report:** [Reports](#) → [Daily Reports](#) → [Daily Audit](#) (allows you to search appointments, transactions in ledger and signed progress notes by date range. Will not separate providers.) \*in order to search individual providers unsigned or missing notes, use the progress notes report\*

**Progress Notes Report:** [Reports](#) → [Daily Reports](#) → [Patient Progress Notes](#) Allows you to identify unsigned or missing progress notes by specific provider and date range.

**Daily Journal by Provider:** [Reports](#) → [Daily Reports](#) → [Daily Journal](#) (detailed report provides transaction details of services payments and adjustments posted to a provider or by a user within a certain date range.)

**Daily Collection by Provider:** [Reports](#) → [Daily Reports](#) → [Collection](#) (Creates a detailed report of payments received within a date range by provider, carrier or ada code)

**CLICK REPORTS & CHOOSE DAILY REPORTS**

The screenshot shows the Denticon patient window. The 'Reports' menu is open, highlighting 'Daily Reports'. The patient information section shows:
 

- Patient Name: Test, Conversion Lexington
- Birth Date: 7/15/2008
- Age / Sex: 12 / F
- Insurance: Blue Cross Blue Shield Federal

The screenshot shows the 'Daily Reports' configuration page. Key elements include:
 

- SELECT REPORT:** A list of report types such as 'Peg Board Day Sheet', 'Daily Journal', 'Production Report', 'Collection Report', and 'Deposit Slip'. A yellow arrow points to this list with the annotation 'CLICK TO CHOOSE DESIRED REPORT'.
- REPORT CRITERIA:**
  - REPORT FORMAT:** Options for 'Detail' (selected) and 'Summary'.
  - OFFICE/GROUP:** Options for 'Office' (selected) and 'Office Group'.
  - DATE RANGE:** Fields for 'Start Date' and 'End Date', both set to 11/04/2020. A yellow arrow points to this section with the annotation 'SELECT DESIRED DETAILS AND DATE RANGE'.
  - PAYMENT TYPES:** A dropdown menu currently set to 'ALL'.
  - Buttons:** 'PRINT / PREVIEW' and 'ADD TO MY FAVORITES' are visible at the bottom right. A yellow arrow points to the 'PRINT / PREVIEW' button with the annotation 'CLICK PRINT/PREVIEW'.