

Orthodontic Reports to meet all your practice needs!

Appointment Daysheet

Appointment Day Sheet for Wednesday February 22, 2006 Report Date: 12/19/2006
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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**, **Total Patient Balance** and Patient Balance **Due Now** from their payment plan; 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 Report Date: 12/14/2006
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Billing Doctor ALL
Treating Doctor ALL

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
INS NAME	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
Subtotal for:	ADI		4,246.50			572.92	266.67	311.32	266.67	0.00	291.60	1,709.18

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. In addition, the report ages **Payment Plans** and **Continuation of Treatment** plans when applicable.

Payments Due From Payment Plan

Payment Plan Payments Due Between 12/01/2006 and 12/19/2006 Report Date: 12/19/2006
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Doctor ALL

Patient	Due Date	Payment #	Amount	Amount Paid	Paid Date
APPLETON JR JIMMI	12/01/2006	4	120.00		
APPLETON JR JIMMI	12/01/2006	2	167.00	167.00	11/28/2006
DEES PATRICIA A	12/01/2006	1	150.00		
MILLER NANCY L	12/01/2006	7	55.56		
MORRIS DONNA J	12/01/2006	10	51.00		
MORRIS DONNA J	12/01/2006	5	55.56		
SMITH PATRICIA	12/01/2006	4	54.50		
ZEVONE WARREN G	12/01/2006	7	44.44		
Grand Total			698.06		

Located in **Reports** in the task pane on the main screen of PerfectByte, **Financial Reports.**

Run a report of all **Payments Due** between two dates with selection to show payments or not.

Also, filter this report by patients who have given permission for you to charge their credit card monthly for installment payments. Another convenient report for tracking and collecting on Payment Plans.

Referring Doctor Reports

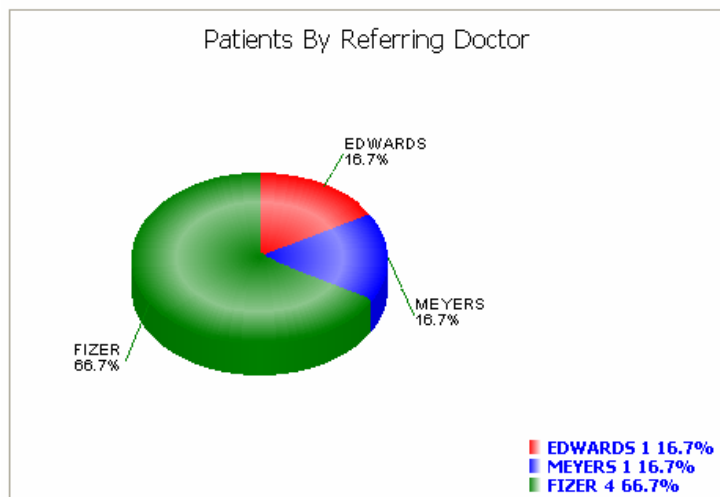
Referring Doctor		Referring Doctor Frequency Report			Report Date: 12/14/2006			
Treating Doctor		For Dates 08/01/2006 through 12/14/2006			Page 1			
Referral Source		Code	Pt Status	Visit Date	Total	Patient	Insurance	Expected
Name								
Referring Doctor: FIZER								
APPLETON JR JIMMI		D1310	DELAYED	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
Total for		FIZER		9	8,275.00	5,835.00	2,440.00	290.00

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

