NHS OrthoExec® Advanced Series Reports

The following is a partial list of standard and customizable reports available to NHS OrthoExec® Advanced Series users.

Please contact NHS for information on custom reports and other reporting options.

Report Categories:

Accounting
Code Listings
Insurance
Patient Reports
Referral Reports
Scheduling
Stats
Treatment Card

ACCOUNTING

Adjustments
This report will list all the adjustments posted during a date range.

Aging Report
The aging report gives in detail the status of each patient's account – amount past due, balance, and insurance owing.

Aging Work Sheet
This report is the same as the Aging Report with added information to help you with collection work.

Alternate Payment Plan
Allows an office to show a couple of different options for patients payment plans.

Collection Report
Use this worksheet to check on promised payments still outstanding.

Coupon Book
Coupon books may be made for each patient. If more than one person is responsible for the account, a coupon book may be printed for each responsible person.

Credit Balance Report
This report lists all the accounts that have a credit balance.

Daily Journals
This report shows all charges, adjustments, and payments for a specified day. You may choose to print a combined report of all office/doctors or by individual office and doctor.

Daily Journals by Category
This report shows all charges, adjustments, and payments for a specified day by category. When setting up the posting code you can give it a letter or number for a category type. (i.e.: all charges can be given a C, payments given a P, any charge that is production given a P, etc.).

Deposit Slips
This report shows all payments posted since the last time the deposit was cleared. You may choose to print the report by all offices or individual office and/or all doctors or an individual doctor.

Negative Charge Report
This report prints all negative charges for the selected date range.

Print Ledger
This report allows you to print a patient’s ledger.

Print Receipt
You are able to print a receipt for any payment made on a “regular” account.

Retainer Patients with a Balance
This report is great for an office that is considering selling the practice. It will print out all retainer patients that still owe you money.

Statements
Statements are run to provide ledger print for billing purposes.

Truth in Lending
This report will calculate and print a truth in lending statement.

CODE LISTINGS

Print outs of major codes you have entered into your system. (i.e., Posting Codes, Referral Codes, Insurance Codes, etc.).

INSURANCE

Claims
Prints an insurance claim form to be submitted to insurance.

Queue Listing
Shows all monthly / quarterly billings for insurance.

Specific Insurance Search
Lists all patients who have a specific insurance.

Superbill
Allows you to give a bill like form for patients to bill their insurances.

PATIENT REPORTS

Birthday
This report will print a list of patients with a birthday for a specific month, as well as key on specific treatment status.

Chart Information
This is a printout of a patient's chart information.

HIPAA Report
This report can be used to find out if patients have signed or not signed the HIPAA Information Sheet.

Individual Diagnosis / TX Plan
Will print the diagnosis for the selected patient.

Model Box Location
This report will list patients in alphabetical order or model box number order.

Name/Address
This report will print a list of all patients in alphabetical order.

Note Pad
Report to follow up on the tickler dates of messages entered in Note Pad and/or New Patient Control.

O/H Report
If using the Oral Hygiene feature available in the Patient Chart area, you can print a report for a certain month and year listing patients that are due for their oral hygiene checkup. Then use this report for merging a letter to the Dentist letting them know which mutual patients need their checkup.

Past Completion Date
Lists patients past the selected completion date.

Patient Appointment Log
Print out of a patient's appointment log history.

Recall Report
This is a great report to follow up on your recall patients. You will pull up patients that are in a certain recall status and follow up on them to make sure they have an appointment for a recall check for the month they are due to be seen in.

Records In & Out
Report to follow up on x-rays, models, or lab work that has been sent out and to whom and when it was due back.

School Report
Search by treatment status of patients that are attending the same school. Can search for individual school or all schools.

Siblings Report
You can search the siblings that you have added, by follow-up date.

Transfer Report
Copy of the AAO transfer form.

Treatment Search – Current
This report allows you to search by patient's **CURRENT** treatment status.

Treatment Search – Historical
This report allows you to search by patient's Historical treatment status in a date range.

REFERRAL REPORTS
Reports can be generated tracking who referred your patients. Generated by patient status, current and historical, and by referring dentist/person or by the patient's dentist.

Current Treatment Status
This report shows all the patients for the selected treatment status(es) and groups them by dentist/referral.

Historical Treatment Status
This report will list any patients that have the selected status(es) within the date range that you choose.

SCHEDULING

Appointment History Log
Shows all the appointments scheduled within the selected date range. Also gives information from the Check-in screen.

Cancellation List
A printout of the cancellation list.

Confirmation List
This is a list of all patients coming in for the day with phone numbers to call them.

Day Listing
This is a nice report for a list of all patients coming in for the day.

Future Appointments
Will give all patient for the selected procedures for the selected date range.

Future Appointment Totals
Shows all procedures and gives totals for filled appointments and total procedures blocked. Very good at showing percentage booked you are, especially if you block your day.

Future Available Blocked Procedures
Shows which appointments are available during the selected date range (if you block your procedures).

No Future Appointments
Will show anyone without a future appointment, provided they have been scheduled at least once before and they are currently in selected treatment status. Options also include choose a particular days patients without future appointments or a starting date to look future from.

No Show Listing
If the check-in is used and the patient gets marked “No Show” or they get marked “No Show” from within the scheduler, then you can print a list of No Shows for the selected date range.

Outguides
Can be used as a placeholder or as a routing slip for each patient. Customized to your specifications.

Procedure Recap
Lists all appointments for each procedure during selected date range.

Sign-In Listing
This is a list of all patients scheduled for the day. It has their name and time of appointment and an area for them to sign their name when they arrive for their appointment.

Traycover
Prints an individual or all of a day’s patients, giving each one an individual sheet that shows treatment card information, Q & A, responsible party information, and appointment information.

Will Call
Will list everyone from the will call.

STATS

Daily Deposit Recap
This report gives all charges, adjustments, and payments posted for the month. It breaks these totals down by day.

Individual Posting Code Summary
This report will show you all the transactions for the selected posting codes for the selected date range.

Monthly Receivable Recap.
The information for this report is automatically gathered during the month end process. If you are splitting insurance ledgers, the totals on this report break down between patient contracts and insurance contract, along with a grand total.

New Patient Tracking List
Allows you to follow patients entered for selected date range and see how they are progressing.

Posting Code Summary
This report prints out a list of all the posting codes for the period of time you ask for.

Receivable Projection Report
This report will give all payment schedules over the next 6 months.

Revenue by Referral
This report gives revenue totals for each referral.

Tx Status by Age / Sex
Will show the age (adult vs. child) and sex breakdown for each month by Treatment Status.

Tx Status Year to Date
Will give you the totals for treatment status, which are gathered at month end for each month through the selected year.

Yearly Comparison Recap
Shows all charges, adjustments, and payments for each month of the year. It also compares these totals with last year's totals.

Yearly Exams
Gives totals of exams for each referral broken down by month and year.

TREATMENT CARD

TxCard Report
Shows all notes for selected date range from the treatment card.