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TRAINING TIP

END OF YEAR GENERAL INFORMATION

Recommended Procedures for End of Year 2020

PRIOR TO DOING YEAR END PROCEDURES, PLEASE MAKE SURE THAT YOU HAVE A VALID BACKUP.

POSTING: After all activity has been entered for 2020, run POSTING manually

Do not wait until January to post.
To ensure that posting runs in 2020, do not run posting through the Job Scheduler.

You can leave posting in the job scheduler to run, there is no need to remove it, but you must run it manually at the end of business day 2020 in order for end of year revenue numbers to be correct.

RESET INSURANCE MAXIMUMS:
This should be run after all activity has been entered for 2020 and before any work is entered in 2021. Reset Maximums After 12/31/2020 Through 01/31/2021

***If you have Reset Maximum set to run in Job Scheduler make sure that it is set to run on January 1st.

Reset Patient/Dr. Referral Period? Answer "yes" if you want the system to zero out the count for Patient and Doctor referrals. This will allow the system begin counting the referrals again starting January 1st. The count of "Total Referrals" is not affected.

End of Year? Answering "yes" tells the system that all of the financial transactions have been posted. What this does: In Patient Registration any amounts accumulated for this years "Year to Date" totals will be moved to the "Last Year" column.

DO NOT answer "yes" to this question more than once or you will lose your figures! When the question comes up again at the end of January, answer "no".

MONTH END GENERATION:
MONTHEND should be done after all of the above has been completed.
Answer the prompts as follows: Month: 12 Year: 2020 Pay Class Data: Y

***If MONTH END is set to run in the Job Scheduler make sure that it is set to run on January 1st.

GENERATE AND PRINT REPORTS:

Account Receivable reports, if required by you or your accountant, should be run prior to 2021 entries.

Time sensitive reports include Producer A/R along with Daysheet A/R, Aged Accounts Receivable, Payor A/R.

All other Dentech reports can be requested at anytime as needed.

PLEASE BACKUP AGAIN AFTER COMPLETING THE ABOVE.