

# SoftDent Software

## Daily Reports: End of Day

This one-page job aid lists the recommended reports in the SoftDent practice management software that should be generated at the end of each day.

The table below includes report name, path, and a brief description of each report.

Name and Path	Description
<b>Daysheet</b> Reports > 5. Daysheet	<ul style="list-style-type: none"> <li>Overview of daily finances (i.e., posted transactions, production, collection, receivables, and number of new and existing patients seen)</li> <li>Generating the final Daysheet ensures the accuracy of the receivables totals and accounting reports</li> </ul>
<b>End of Day Call Backs</b> Reports > 4. End of Day Call Backs	<ul style="list-style-type: none"> <li>Appointments marked for a follow-up call at the end of the day</li> <li>List can be sent to the Contact Expert</li> </ul>
<b>Daily Register</b> Reports > 6. Daily Register	<ul style="list-style-type: none"> <li>Daily summary of the number of patients seen, number of new patients, production, and collection amounts</li> </ul>
<b>Unsubmitted Claims</b> Reports > Practice Management > Insurance Reports > Unsubmitted Claims	<ul style="list-style-type: none"> <li>Insurable transactions not submitted to an insurance company for payment</li> <li>Includes unsubmitted charges for patients by dates of service</li> </ul>
<b>Daily Operatory Schedule</b> Reports > 1. Daily Op Schedule	<ul style="list-style-type: none"> <li>Patient appointments by room and provider</li> <li>Report setup defaults to tomorrow's date</li> <li>Prints patient name, procedure, confirmation icon, medical alerts, and appointment notes</li> <li>Option to print in HIPAA privacy mode</li> </ul>