

Snapshot Report

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Overview

The Snapshot is a very powerful report. You can access data about production, collection, referrals, cases, etc., all in a format that allows you to filter by date, referring doctor, and other parameters, all on one page. In this article, we will discuss how to access and read the Snapshot effectively.

Detailed Instructions

Opening the Snapshot

Version 12: Open [Main > Reporting Tools > Financial > Snapshot]

Version 11: Open [Reports > Financial > Snapshot]

Setting Parameters

Version 12:

The screenshot shows the parameter settings for the Snapshot report in Version 12. It includes a 'Detail Report Order' section with radio buttons for 'Date' (selected), 'Amount', and 'Name'. Below this is a red instruction: 'Double-Click on entry to see detail report'. The 'Referring Doctor' is set to 'All', 'Referring Practice' to 'All', and 'Period' to 'Today'. The 'Location' is set to '(All)' with a 'Fit to paper size' checkbox checked. The 'Begin Date' and 'End Date' are both set to '11/25/2020'. The 'Group By' section has radio buttons for 'Doctor' (selected) and 'Location'. A red exclamation mark icon is visible next to the 'Group By' section.

Version 11:

The screenshot shows the parameter settings for the Snapshot report in Version 11. The title 'Dr Carr Main location Snapshot' is displayed. The 'Referring Doctor' is set to 'All', 'Location' to 'All', and 'Period' to 'Last Year'. The 'Begin Date' is '01/01/18' and the 'End Date' is '12/31/18'. The 'Fit to paper size' checkbox is unchecked. The 'Group By' section has radio buttons for 'Doctor' (selected) and 'Location'. A red exclamation mark icon is visible next to the 'Group By' section. Below this, there is a second set of parameter settings, which appears to be a duplicate or a different view of the same settings.

Note: The **Location** filter will only show up if your practice is Replicated. The **Referring Practice** filter will only show up in Version 12.

Users of older revisions of Version 11 may not see the red '!' used to refresh the Snapshot. If your Snapshot does not have this button, it should refresh automatically when you change one of the filters.

Period:

To use the Snapshot effectively, you'll need to filter the data using the available parameters. The first parameter you'll want to set is **Period**, which refers to the span of time that you want the Snapshot to cover. When you first open the Snapshot, this will be set to 'Today', so you will be seeing data from Today only. You could also set the **Period** to 'Last Month', 'Current Month', 'Current Year', etc. to view data for those periods.

Referring Doctor:

You can also filter the data by **Referring Doctor**, viewing (for example) production, collection, etc. for only one referrer. The default value for this filter is 'All' which will show all data irrespective of referrer.

Replicated PracticesLocation Filters:

For TDO practices with multiple locations (in a replicated environment), you can filter the Snapshot data by **Location**. For example, if you wanted to view production and/or collection for Location 'A', you would select that Location for this filter. If your practice has multiple doctors and multiple locations, you can select whether to group the columns in the Snapshot by Doctor or by Location.

[Version 12] Referring Practice:

In Version 12, Referring Doctors can be grouped into Referring Practices. If you are using this feature, you can filter the Snapshot by **Referring Practice** instead of Referring Doctor, viewing data for referrers that have been grouped into the selected practice.

Applying Filters

Once you have selected your parameters, you must click the red '!' to apply your filters.

Snapshot

Referring Doctor All	▼	Location (All)	▼	☐ Fit to paper size	Group By: ☒ Doctor ☐ Location	< >
Period Today	▼	Begin Date 11/25/20	▼	End Date 11/25/20		

Note: Users of older revisions of Version 11 may not see the red '!' used to refresh the Snapshot. If your Snapshot does not have this button, it should refresh automatically when you change one of the filters.

Gross Production:

	CARR ONE	CARR TWO	Doe ONE	Doe TWO	Total
Gross Production					
Total Production	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Adjusted Production	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
MTD	\$1,568.00	\$0.00	\$0.00	\$0.00	\$1,568.00
Last Year MTD	\$5,279.52	\$0.00	\$0.00	\$0.00	\$5,279.52
YTD	\$48,447.60	\$5,309.52	\$375.00	\$1,535.00	\$56,059.12
Last YTD	\$101,731.52	\$12,116.52	\$4,985.52	\$3,000.00	\$127,939.56
Debit Adjustments	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

This section contains information about your practice's production. **Total Production** refers to the total value of all fees applied to patients (within the specified parameters). **Adjusted Production** shows total production minus ledger credit adjustments applied within the specified parameters. **MTD** shows the current month-to-date total production (Period filter has no effect on this figure). **Last Year MTD** shows the total production for the same period (current month to date), but from last year (e.g. if today is 5/14/19, Last Year MTD shows total production for 5/1/18-5/14/18) (Period filter has no effect on this figure). **YTD** shows the total production for the current year-to-date (Period filter has no effect on this figure). **Last YTD** shows the total production for the same period, but last year (e.g. if today is 5/14/19, Last YTD shows total production from 1/1/18 - 5/14/18) (Period filter has no effect on this figure). **Debit Adjustments** shows the total of all debit adjustments (ledger adjustments that increase the patient's balance) applied within the specified parameters.

Collection:

Collection

Cash	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Cheque	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Credit Card	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Visa	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Mastercard	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
AMEX	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
recurring	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Receipts	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Adjusted Receipts	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
MTD	\$532.00	\$0.00	\$0.00	\$700.00	\$1,232.00
Last Year MTD	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
YTD	\$18,477.91	\$1,300.00	\$0.00	\$1,220.00	\$20,997.91
Last YTD	\$16,159.01	\$110.00	\$275.00	\$0.00	\$17,109.01
Credit Adjustments	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

This section contains information about your practice's collection (money collected, logged using the 'Receive Payment' buttons in the Ledger). **Cash** shows the total of cash payments taken within the specified parameters. **Check/Cheque** shows the total of check payments taken within the specified parameters. **Credit Card** shows the total of credit card payments taken within the specified parameters. It is further divided into major carriers: **Visa**, **Mastercard**, **Discover**, and **AMEX** (the carrier is selected when the payment is taken). **Other** shows the total of payments collected that were marked with any other payment method (Debit/ATM payments and other custom values will land in this section) taken within the specified parameters. **Total Receipts** shows the total of all methods of payment taken within the specified parameters. **Adjusted Receipts** shows total receipts minus ledger debit adjustments applied within the specified parameters. **Credit Adjustments** shows the total of all credit adjustments applied within the specified period.

Accounts Receivable:

AR 30	\$98,266.58	\$11,600.01	\$0.00	\$0.00	\$109,837.61
AR 60	\$2,742.52	\$0.00	\$0.00	\$0.00	\$2,742.52
AR 90	\$274,811.02	\$39,750.75	\$3,027.77	\$5,136.50	\$393,550.28
AR All	\$377,328.64	\$52,085.76	\$3,027.77	\$5,136.50	\$507,838.93

This section shows information about Accounts Receivable. **AR 30** shows accounts receivable older than 30 days (Period filter has no effect on this figure). **AR 60** shows accounts receivable older than 60 days (Period filter has no effect on this figure). **AR 90** shows accounts receivable older than 90 days (Period filter has no effect on this figure). **AR All** shows all accounts receivable, irrespective of aging (Period filter has no effect on this figure).

Miscellaneous:

New Web Referrals	0	0	0	0	0
New Non-Web Referrals	0	0	0	0	0
Patients Seen	0	0	0	0	0
Days Worked	0	0	0	0	0
Cases Started	0	0	0	0	0
Cases Completed	0	0	0	0	0
Internal Emergencies	0	0	0	0	0
External Emergencies	0	0	0	0	0
Failed/Cancelled Appts	0	0	0	0	0
Consults Seen	0	0	0	0	0
Avg PI (complt'd cases)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Treatment Time	0:00	0:00	0:00	0:00	0:00

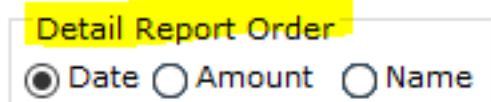
This section covers various miscellaneous statistics from your practice that is valuable to see on a regular basis. **New Web Referrals** shows the number of patients referred via the Referring Doctor web portal, within the specified parameters. **New Non-Web Referrals** shows the number of new patients entered via the TDO program, within the specified parameters. **Patients Seen** shows the number of appointments completed within the specified parameters. **Days Worked** shows the number of days that had at least one patient appointment within the specified parameters. **Cases Started** shows the number of cases started within the specified parameters. This is determined by counting the number of fees posted that have the 'Case Start' property selected in their respective fee schedule [Program Setup > Fees Listing/ADA Codes] (see screenshot).

Number	Code	Description	Fee	Ins Category	Estimate Number of Visits	Prognosis	Case Start
	GENT	GW test code *deleted code*	\$250.00				☐
1	CCCCC	Cheryl Testing*	\$0.00				☐
10	GENT	Gentlewave	\$200.00				☒
590	D2222	test ORIGINAL	\$100.00				☒

Cases Completed shows the number of cases completed within the specified parameters. This is determined by marking the case as completed and the 'Comp Date' of the tooth. **Internal Emergencies** shows the number of appointments within the specified parameters that have the 'Appointment Type' of Internal Emergency. **External Emergencies** shows the number of appointments within the specified parameters that have the 'Appointment Type' of External Emergency. **Failed/Cancelled Appts** shows the number of appointments within the specified parameters that were cancelled, no show, or rescheduled. **Consults Seen** shows the number of consult appointments that occurred within the specified parameters. **Avg PI (complt'd cases)** shows the average PI on completed cases within the specified parameters. PI stands for Profitability Index. PI is calculated as total production divided by time (Dollars per Hour). Time could be either the treatment timer (if you use it) or the virtual timer which is the appointment length. **Treatment Time** shows the total amount of treatment time (HH:MM) within the specified parameters (recorded using either the Treatment Timer or based on the length of appointments). **Waiting Time** shows the total amount of recorded waiting time (HH:MM). Waiting time is defined as the difference in time between when a patient is marked checked in on the calendar (right-click the appointment, then click 'Check In') and when their treatment timer is started, after their

appointment is scheduled to start. If a patient has an appoint scheduled for 10:00, is marked checked in at 09:55, and the treatment timer is started at 10:05, the waiting time will reflect 5 minutes because they waited 5 minutes after their appointment was scheduled to have their treatment timer started. **Start Time on [Tomorrow]** shows the time of the first patient to be seen the following day. **Patients to be Seen** shows the number of patients scheduled to be seen the next day, within the specified parameters.

Opening Detail Reports



Detail Report Order

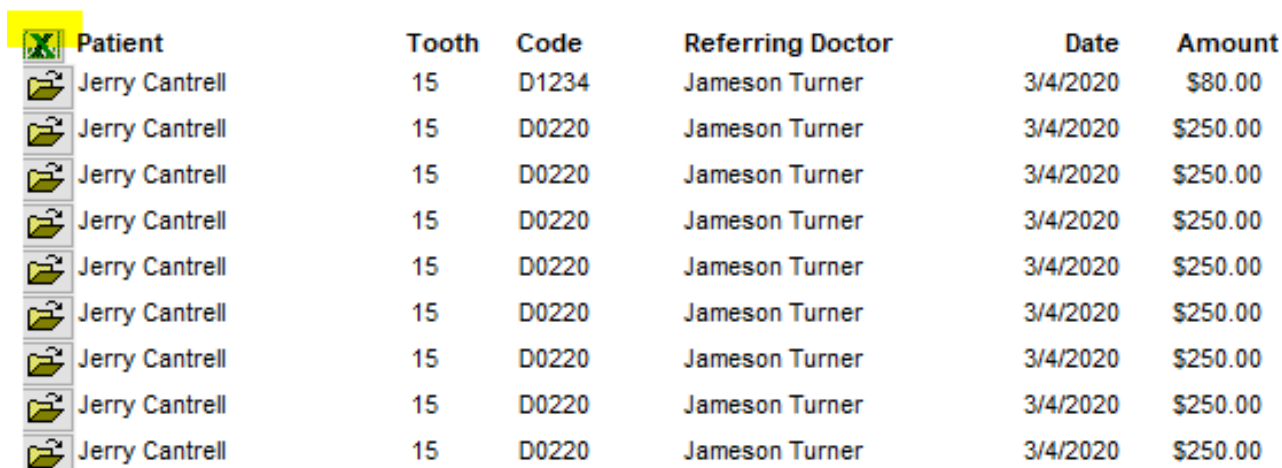
☒ Date ☐ Amount ☐ Name

Double-Click on entry to see detail report

Nearly all of the values that you see in the snapshot are aggregates, representing counts, totals, or averages of constituent values. You can double-click any figure in the Snapshot to open a **Detail Report**, which will break down the figure into the values that make up the aggregate. To change the way these Detail Reports are sorted, select one of the options under Detail Report Order in the upper left hand corner of the Snapshot, then click the red '!' to apply this change.

Exporting to Excel:

If you have a compatible version of Microsoft Excel installed, you can export the data from these Detail Reports into a spreadsheet by clicking the green 'X' button in the upper left hand corner of the Detail Report window.

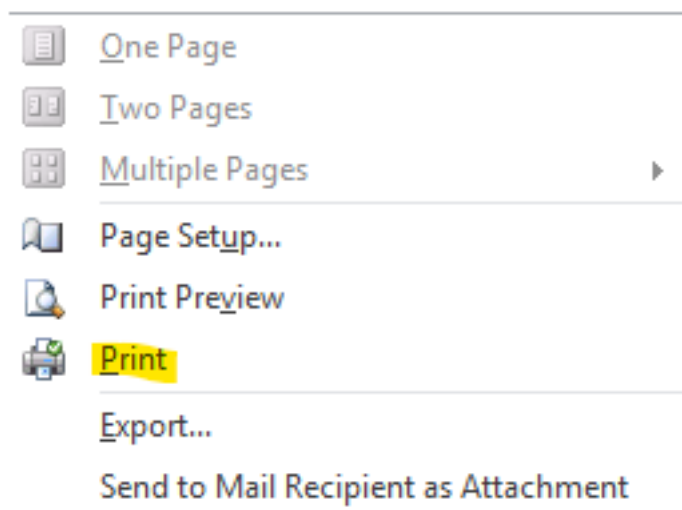


 Patient	Tooth	Code	Referring Doctor	Date	Amount
 Jerry Cantrell	15	D1234	Jameson Turner	3/4/2020	\$80.00
 Jerry Cantrell	15	D0220	Jameson Turner	3/4/2020	\$250.00
 Jerry Cantrell	15	D0220	Jameson Turner	3/4/2020	\$250.00
 Jerry Cantrell	15	D0220	Jameson Turner	3/4/2020	\$250.00
 Jerry Cantrell	15	D0220	Jameson Turner	3/4/2020	\$250.00
 Jerry Cantrell	15	D0220	Jameson Turner	3/4/2020	\$250.00
 Jerry Cantrell	15	D0220	Jameson Turner	3/4/2020	\$250.00
 Jerry Cantrell	15	D0220	Jameson Turner	3/4/2020	\$250.00
 Jerry Cantrell	15	D0220	Jameson Turner	3/4/2020	\$250.00

Printing the Snapshot

You may print the main Snapshot page, or any Detail Report by striking CTRL+P on your keyboard, or by right clicking in blank space and selecting **Print**. You may want to check the **Fit to paper**

size checkbox before printing the Snapshot.



Summary Reports

To open **Summary Reports**, double-click the Doctor's name at the top of any column in the Snapshot. The report that opens will have an entry for each day within the specified parameters, as well as a final section covering the totals from the specified period. Depending on the length of the Period specified, this report can span multiple pages. You can print this report by striking CTRL+P on your keyboard, or right-clicking the report and then clicking Print.

Patient	Tooth	Code	Referring Dr	Fee	Collect	Deb Adj	Cred Adj	Balance	NV	Home Phone	WorkPhone
Total Billed		\$0.00								Beginning AR	
Total Collected		\$0.00	Cheque							Ending AR	
Total N/C		\$0.00	Cash	\$0.00						Change in AR	
Total Debit Adj		\$0.00	Credit Card	\$0.00							
Total Credit Adj		\$0.00	Other							Total Ins Billed	\$0.00
Report Totals From 11/25/2020 To 11/25/2020					Days Worked		0				
Total Billed		\$0.00			Avg Billed					Beginning AR	
Total Collected		\$0.00	Cheque	\$0.00	Avg Collected					Ending AR	
Total N/C		\$0.00	Cash	\$0.00	Avg MTD Billed		\$120.62			Change in AR	
Total Debit Adj		\$0.00	Credit Card	\$0.00	Avg MTD Collected		\$94.77				
Total Credit Adj		\$0.00	Other	\$0.00	Avg YTD Billed		\$268.23			Total Ins Billed	\$0.00
Wednesday, November 25, 2020					Avg YTD Collected		\$100.47				

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