
END OF YEAR GENERAL INFORMATION

Recommended Procedures for End of Year

POSTING: After all activity has been entered for 2008, run POSTING manually while it is still 2008.
Do not wait until January to post.

To ensure that posting runs in 2008, do not run posting through the Job Scheduler. ***If you have POSTING setup in the *Job Scheduler*, remove and reset the dates to begin running for the first business day in January.

RESET INSURANCE MAXIMUMS:

This should be run after all activity has been entered for 2008 and before any work is entered in 2009.

Reset Maximums After 12/31/2008 Through 01/31/2009

***If you have Reset Maximum setup within the Job Scheduler remember to reset it 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 let 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 year "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: 2008 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 2009 entries.

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

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

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