

End of Year Procedures: A Comprehensive Guide for 2023

As the year draws to a close, it's essential to ensure that your Dentech system is ready for the transition into the new year. Here's a detailed guide on the recommended procedures for the end of 2023.

DISCLAIMER : Certain recommended end of year procedures and reports may be different depending on the version of Dentech the practice is running.

Important Reminder: Backup Your Data

Before diving into the year-end procedures, it's crucial to make sure you have a valid backup of all your data. Don't skip this step, as it ensures the safety and security of your records.

1. Posting Procedures:

After all activity for 2023 has been entered, **ensure to run POSTING manually.**

- **Key Point:** Avoid waiting until January 2024 to post.
- To guarantee that posting takes place in 2023, **refrain from running posting via the Job Scheduler.**

2. Resetting Insurance Maximums:

This procedure should be **executed after all 2023 activities have been inputted and before starting any entries for 2024.**

- Reset Maximums from 12/31/2023 to 01/31/2024.
- If the Reset Maximum is scheduled in the Job Scheduler, confirm that it's set to activate on January 1st, 2024.

Reset the 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”.**

3. Month-End Generation:

Conclude the MONHTEND process after completing the aforementioned steps.

- Provide the following input: Month: 12, Year: 2023, Pay Class Data: Y.
- **If MONTH END is set to be automated in the Job Scheduler, ensure it's set to run on January 1st, 2024.**

4. Generating and Printing Reports:

If your accountant requires Account Receivable reports, produce them before making entries for 2024.

- Priority reports to consider are Producer A/R, Daysheet A/R, Aged Accounts Receivable, and Payor A/R.
- Any other Dentech reports can be fetched whenever necessary.

Final Step: Backup Your Data Again

Ensure the safety of your records by creating another backup after you've finished the year-end procedures.