

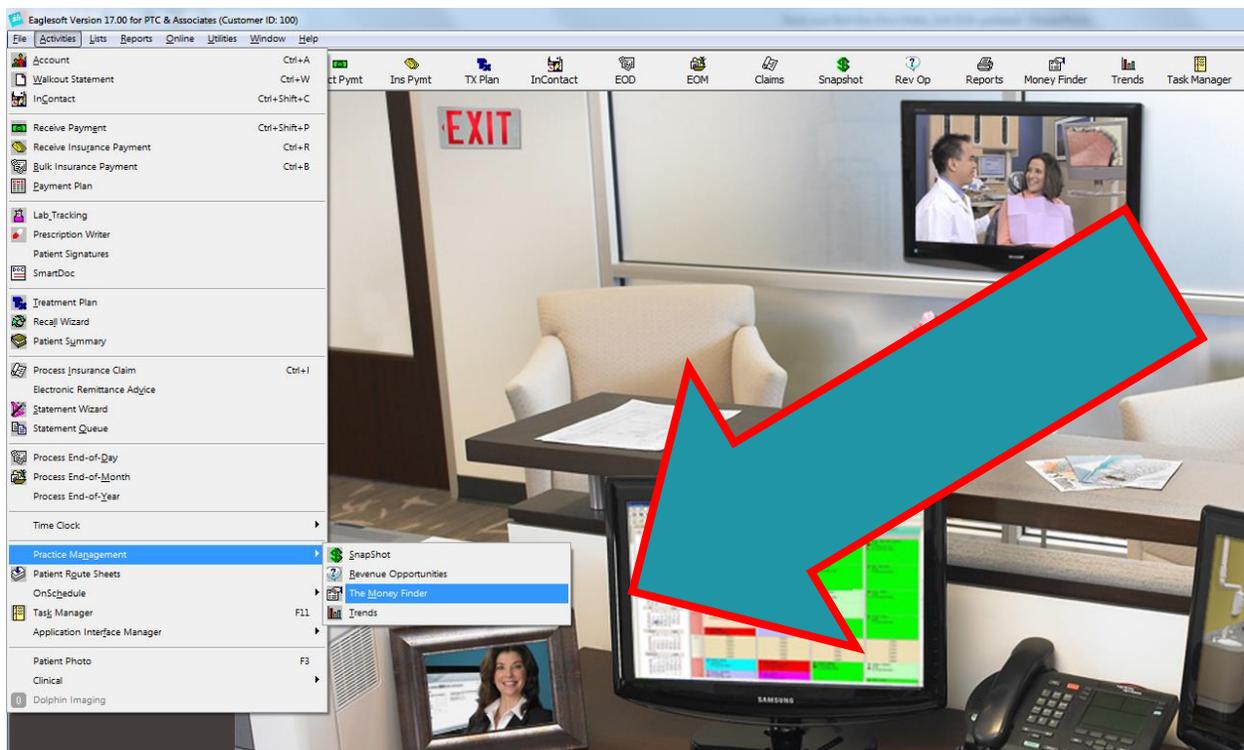
How to Use The Eaglesoft Money Finder Report to Fill Your Schedule

Rebuilding your patient schedule is an important step in rebounding your practice productivity. A great feature that can easily aid in this rebuilding is **The Money Finder** report.

The Money Finder is appropriately named, as it does just that - finds the hidden **money** in your practice by finding patients that need treatment. It performs this function by accessing a variety of areas in your system, including appointment status, insurance status, recommended work and planned treatment status, and completed service status. Depending on the parameters you choose, **The Money Finder** queries your patient base and produces a concise list of patients who fit your practice's particular needs at any given moment.

For example, **The Money Finder** will help you find patients who have had an endo service, have not followed up with a crown service, have met their deductible, and have at least \$500 in remaining benefits. Imagine the revenue opportunity having this information at your fingertips!

In Eaglesoft, you can find **The Money Finder** under the **Activities Menu**.



Then simply use the filter to find patients that meet the specified criteria. Some examples are:

- Maximize Insurance Benefits
- Root canal completed, but not the crown
- Scaling and root planning completed, but no perio maintenance scheduled
- Patients that have never had a comprehensive exam

The Money Finder

Categories: Maximize Insurance

NRA: NPA: Scheduled & Unscheduled
 Patients Not Scheduled
 Patients Scheduled

Select Only Patients Who:

Are On Short Notice
 Deductible Does Not Apply To Prev.
 Have Cancelled Or Failed Appointments
Have Appt Time Preference: [All]

Have Insurance Status Of: [With Insurance]
Have Preferred Dentist Of: [All Providers]
Recall Note Includes:

Include Patients That Match The Following:

Has Or Lacks Info	Code	Description	From	To	&/Or

Primary Benefits: 200.00 To .00
Prim. Ded. Remaining: .00 To .00
Secondary Benefits: .00 To .00
Sec. Ded. Remaining: .00 To .00
Next Prev. Appt.: 00/00/0000 To 00/00/0000
Next Reg. Appt.: 00/00/0000 To 00/00/0000
Next Recall Date: 00/00/0000 To 00/00/0000
Last Visit Date: 08/02/2013 To 00/00/0000
First Visit Date: 00/00/0000 To 00/00/0000
Age:

+ Add - Delete

Focus on those most likely to say **YES!**

Maximize Insurance

- With insurance
- At least \$200 remaining
- Seen in the last 2 years

The Money Finder

Categories: Maximize Insurance

NRA: NPA: Scheduled & Unscheduled
 Patients Not Scheduled
 Patients Scheduled

Select Only Patients Who:

Are On Short Notice
 Deductible Does Not Apply To Prev.
 Have Cancelled Or Failed Appointments
Have Appt Time Preference: [All]
Have Insurance Status Of: [With Insurance]
Have Preferred Dentist Of: [All Providers]
Recall Note Includes:

Include Patients That Match The Following:

Has Or Lacks Info	Code	Description	From	To	&/Or
Has Any Planned Service			00/00/0000	00/00/0000	

Primary Benefits: 200.00 To .00
Prim. Ded. Remaining: .00 To .00
Secondary Benefits: .00 To .00
Sec. Ded. Remaining: .00 To .00
Next Prev. Appt.: 00/00/0000 To 00/00/0000
Next Reg. Appt.: 00/00/0000 To 00/00/0000
Next Recall Date: 00/00/0000 To 00/00/0000
Last Visit Date: 08/02/2013 To 00/00/0000
First Visit Date: 00/00/0000 To 00/00/0000
Age:

+ Add - Delete

Truly Maximize

by targeting patients who have planned treatment.

The Money Finder

Categories: Maximize Insurance

NRA: NPA:

- Scheduled & Unscheduled
- Patients Not Scheduled
- Patients Scheduled

Select Only Patients Who:

- Are On Short Notice
- Deductible Does Not Apply To Prev.
- Have Cancelled Or Failed Appointments

Have Appt Time Preference: [All]

Have Insurance Status Of: [With Insurance]

Have Preferred Dentist Of: [All Providers]

Recall Note Includes:

Primary Benefits: 200.00 From To .00

Prim. Ded. Remaining: .00 .00

Secondary Benefits: .00 .00

Sec. Ded. Remaining: .00 .00

Next Prev. Appt.: 00/00/0000 00/00/0000

Next Reg. Appt.: 00/00/0000 00/00/0000

Next Recall Date: 00/00/0000 00/00/0000

Last Visit Date: 08/02/2013 00/00/0000

First Visit Date: 00/00/0000 00/00/0000

Age:

Include Patients That Match The Following:

Has Or Lacks Info	Code	Description	From	To	&/Or
Has A Planned Service	D2740	Crown - Porcelain/Ceramic substrate	00/00/0000	00/00/0000	

D2740

+ Add - Delete

Truly Maximize
by targeting patients who have **specific** planned treatment.

The Money Finder

Categories: Maximize Insurance

NRA: NPA:

- Scheduled & Unscheduled
- Patients Not Scheduled
- Patients Scheduled

Select Only Patients Who:

- Are On Short Notice
- Deductible Does Not Apply To Prev.
- Have Cancelled Or Failed Appointments

Have Appt Time Preference: [All]

Have Insurance Status Of: [With Insurance]

Have Preferred Dentist Of: [All Providers]

Recall Note Includes:

Primary Benefits: 200.00 From To .00

Prim. Ded. Remaining: .00 .00

Secondary Benefits: .00 .00

Sec. Ded. Remaining: .00 .00

Next Prev. Appt.: 00/00/0000 00/00/0000

Next Reg. Appt.: 00/00/0000 00/00/0000

Next Recall Date: 00/00/0000 00/00/0000

Last Visit Date: 08/02/2013 00/00/0000

First Visit Date: 00/00/0000 00/00/0000

Age:

Include Patients That Match The Following:

Has Or Lacks Info	Code	Description	From	To	&/Or
Has A Completed Service	D3330	Root Canal Therapy - Molar	00/00/0000	00/00/0000	And
Lacks A Completed Service	D2740	Crown - Porcelain/Ceramic substrate	00/00/0000	00/00/0000	Or
Lacks A Completed Service	D2750	Crown - Porc to High Noble Metal	00/00/0000	00/00/0000	And
Has A Planned Service			00/00/0000	00/00/0000	

+ Add - Delete

Find patients who have had a root canal but **NOT** a crown.



The Money Finder

Categories: Maximize Insurance

NRA: NPA:

- Scheduled & Unscheduled
- Patients Not Scheduled
- Patients Scheduled

Select Only Patients Who:

- Are On Short Notice
- Deductible Does Not Apply To Prev.
- Have Cancelled Or Failed Appointments

Have Appt Time Preference: All

Have Insurance Status Of: With Insurance

Have Preferred Dentist Of: All Providers

Recall Note Includes:

Primary Benefits: 200.00 From To .00

Prim. Ded. Remaining: .00 .00

Secondary Benefits: .00 .00

Sec. Ded. Remaining: .00 .00

Next Prev. Appt.: 00/00/0000 00/00/0000

Next Reg. Appt.: 00/00/0000 00/00/0000

Next Recall Date: 00/00/0000 00/00/0000

Last Visit Date: 08/02/2013 00/00/0000

First Visit Date: 00/00/0000 00/00/0000

Age:

Include Patients That Match The Following:

Has Or Lacks Info	Code	Description	From	To	&/Or
Has A Completed Service	D4341	Perio Scale & Root Plane - 4+per quad	00/00/0000	00/00/0000	And
Lacks A Completed Service	D4910	Periodontal Maintenance	00/00/0000	00/00/0000	Or
Has A Planned Service			00/00/0000	00/00/0000	

+ Add - Delete

Or patients who have had scaling & root planing but have never had perio maintenance

The Money Finder

Site: PTC & Associates

Categories: Custom

NRA: NPA:

- Scheduled & Unscheduled
- Patients Not Scheduled
- Patients Scheduled

Select Only Patients Who:

- Are On Short Notice
- Deductible Does Not Apply To Prev.
- Have Cancelled Or Failed Appointments

Have Appt Time Preference: All

Have Insurance Status Of: All

Have Preferred Dentist Of: All Providers

Recall Note Includes:

Primary Benefits: From

Prim. Ded. Remaining:

Secondary Benefits:

Sec. Ded. Remaining:

Next Prev. Appt.: 00/00/00

Next Reg. Appt.: 00/00/00

Next Recall Date: 00/00/00

Last Visit Date: 00/00/00

First Visit Date: 00/00/00

Age:

Include Patients That Match The Following:

Has Or Lacks Info	Code	Description	F
Lacks A Completed Service	D0150	COMPREHENSIVE ORAL EVALUATION	

Increase production by finding patients who are currently scheduled and have never had a comprehensive exam.

Another opportunity for tracking is the **Recall Note Field**. Use this field in the **Edit Person** window to group patients together by entering the same verbiage. Then use **The Money Finder** to find those patients. Some ideas are Perio patients, patients you want to invite to a charity golf outing, Invisalign patients, and loyalty status. As long as you use exact verbiage, you can use any note and find those patients.

Group Patients Together Using the Recall Note Field

Recall Note: INV

Next Recall: 08/20/2013

Hint: Add multiple notes and separate each with a comma.

Recall Note Includes: GOLF

Group patients together using the Recall Note field.