

View Patients with Unused Benefits

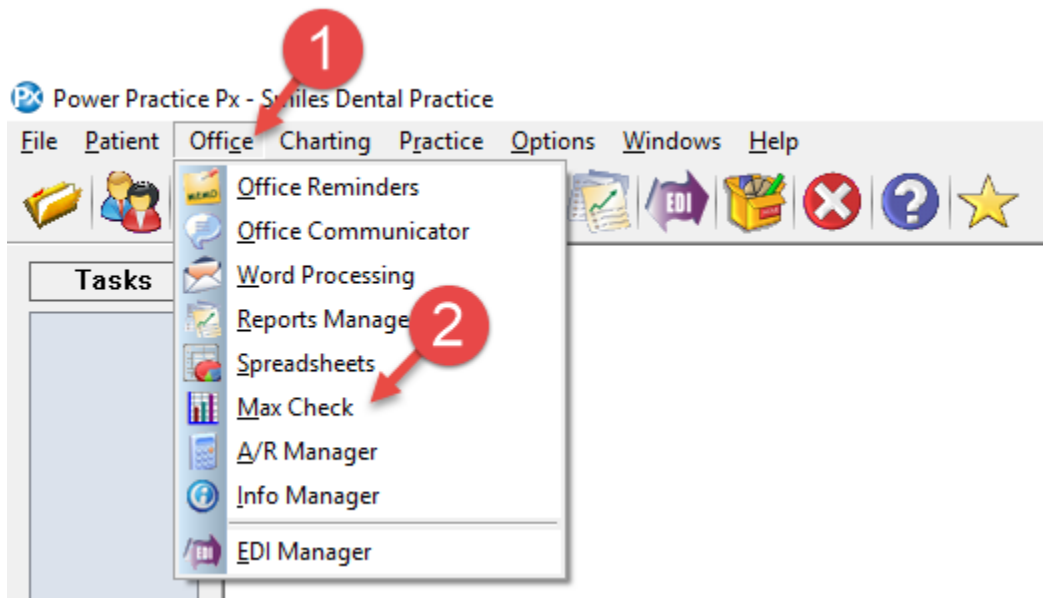
Our goal is to help you generate reports that will help your dental clinic and help your patients use the rest of their benefits before the end of year.

Many patients have unused benefits that they are not aware of. You can generate a list under the **Max Check Report** and see all patients that still have coverage balance they haven't taken full advantage of.

If you have any Incomplete, Planned or Proposed treatments that patients put on hold, now may be a good time to schedule those appointment to maximize their insurance benefits.

To Generate the Report:

1. Select **Office** from the top menu bar.
2. Then select the **Max Check** menu option.



1. Fill in the **From** and **To** date in the expiry date range section.
2. Select the **Incomplete**, **Planned** and **Proposal** types.
3. Then select the **Search** button from the right hand side.

The screenshot shows the 'Max Check' software window. It features a top toolbar with icons for home, user profile, and refresh. Below the toolbar are two tabs: 'Lists' (active) and 'Patient Information'. The 'Lists' tab contains several sections:

- Tx Options:** Includes a 'Producer' dropdown menu.
- Tx Date Range:** Includes 'Tx Date From' and 'Tx Date To' dropdown menus.
- Expiry Range:** Includes 'Exp Date From' and 'Exp Date To' dropdown menus, with a red circle '1' pointing to the 'Exp Date From' field.
- List By:** Includes radio buttons for 'Detailed' (selected) and 'Summary'.
- Tx Types:** Includes checkboxes for 'Complete', 'Incomplete', 'Planned', and 'Proposals', with a red circle '2' pointing to the 'Incomplete' checkbox.
- Sort By:** Includes a list box with options: 'Order', 'Description', 'Patient Name', 'Expiry Date', 'Remaining Limit', and 'Ins Co', with a red circle '3' pointing to the 'Search' button.
- Procedure Search Range:** Includes three 'From:' and 'To:' input fields.
- Buttons:** Includes 'Reset', 'Search', 'Print List', 'Remove', 'Clear', 'Ins. Details', and 'Save Defaults'.

At the bottom of the window is a data table with the following columns: Patient Name, Type, Date, Code, Amount, Ins Co, Pat. Limit, Cat. Limit, Cat. Limit, Cat. Limit, and Email. The table is currently empty.