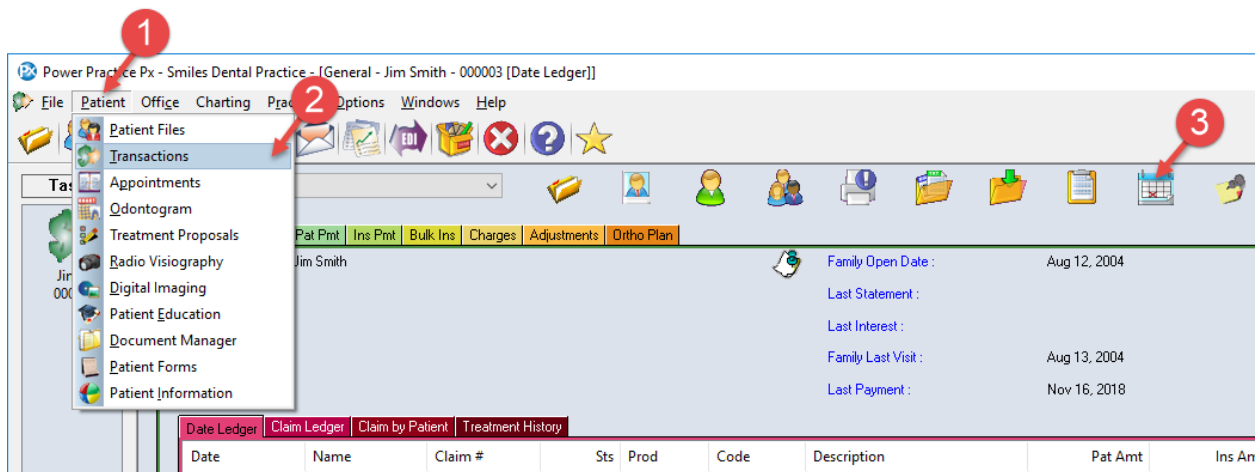


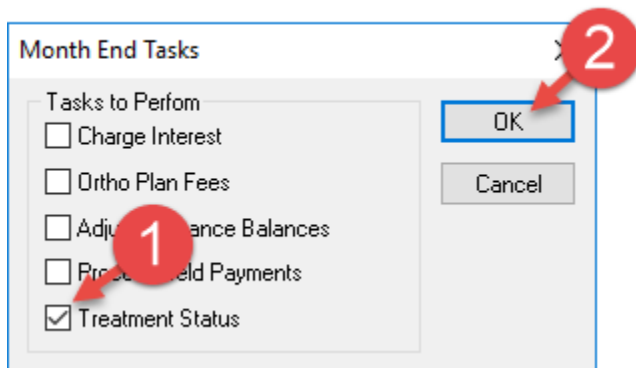
View a List of Incomplete and Planned Transactions

This document will guide you through retrieving a list of patients that have incomplete or planned transactions within a date range.

1. From the top menu bar, select the **Patient** menu.
2. Next select the **Transactions** menu item.
3. When the Transaction module opens, select the **Month End Task** (calendar) icon.

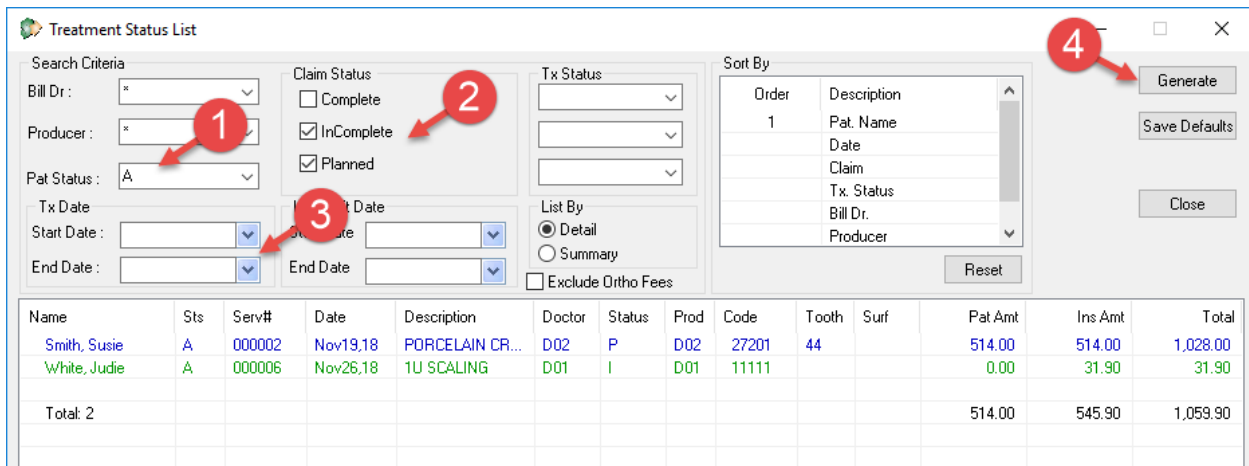


1. Select **Treatment Status** in the Month End Task window that pops up.
2. Select the **OK** button.



Note: A new window will open that can be dragged to a different monitor for easier use.

1. Set the **Patient Status** field to **A** (active).
2. Select the **Claim Status** you want to filter by.
3. Set the **Transaction Date** range to filter by (optional).
4. Select the **Generate** button.



Treatment Status List

Search Criteria

Bill Dr: *
Producer: *
Pat Status: A
Tx Date: Start Date: End Date: Tx Date: Start Date: End Date:

Claim Status
 Complete
 InComplete
 Planned

Tx Status

Sort By
 Order: 1
 Description: Pat. Name, Date, Claim, Tx. Status, Bill Dr., Producer

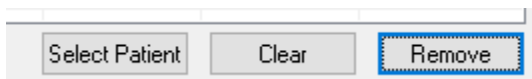
List By
 Detail
 Summary
 Exclude Ortho Fees

Buttons: Generate, Save Defaults, Close, Reset

Name	Sts	Serv#	Date	Description	Doctor	Status	Prod	Code	Tooth	Surf	Pat Amt	Ins Amt	Total
Smith, Susie	A	000002	Nov19,18	PORCELAIN CR...	D02	P	D02	27201	44		514.00	514.00	1,028.00
White, Judie	A	000006	Nov26,18	1U SCALING	D01	I	D01	11111			0.00	31.90	31.90
Total: 2											514.00	545.90	1,059.90

The grid will list all patients and treatments that meet your filtering parameters. If you'd like to see further details on a patient or retrieve their profile to call and book an appointment, you can click them once to highlight that row, then click on the **Select Patient** button at the bottom.

This is where moving the **Treatment Status List** to another monitor becomes useful when working between the 2 windows.



Select Patient Clear Remove