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## TRAINING TIP

# END OF YEAR GENERAL INFORMATION

## Recommended Procedures for End of Year 2022

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

**POSTING:** After all activity has been entered for 2022, run POSTING manually

**Do not wait until January to post.**

To ensure that posting runs in 2022, do not run posting through the Job Scheduler.

**\*\*\*You can leave posting in the job scheduler to run, there is no need to remove it, but you must run it manually at the end of business day 2022 in order for end of year revenue numbers to be correct.\*\*\***

### **RESET INSURANCE MAXIMUMS:**

This should be run after all activity has been entered for 2022 and before any work is entered in 2023. Reset Maximums After 12/31/2022 Through 01/31/2023

**\*\*\*If you have Reset Maximum set to run in Job Scheduler make sure that it is set to run on January 1<sup>st</sup>.**

Reset 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 1<sup>st</sup>. 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".

### **MONTH END GENERATION:**

MONTHEND should be done after all of the above has been completed.

Answer the prompts as follows: Month: 12 Year: 2022 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 1<sup>st</sup>.**

### **GENERATE AND PRINT REPORTS:**

Account Receivable reports, if required by you or your accountant, should be run prior to 2023 entries.

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

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

**\*\*\*PLEASE BACKUP AGAIN AFTER COMPLETING THE ABOVE.\*\*\***