Accounts Receivable Management
Take control of your patient A/R.

1 Day: 9:00 a.m. – 5:00 p.m.

Managing Ledger Transactions
• Understanding the new Dentrix G6 Ledger design, symbols, and display
• Posting procedures in the Ledger
• Posting payments and adjustments
• Splitting payments by provider and by family member (new in Dentrix G6)
• Editing and deleting payments
• Correcting posting errors in history
• Setting up payment defaults

Collecting Outstanding Balances
• Opening and using the Collections Manager
• Creating an individual collection letter
• Creating a collection email message
• Setting up payment agreements
• Setting up common collection lists
• Generating collection letters with the Letter Merge feature

Monitoring your A/R
• Generating and understanding the Aging Report
• Generating and understanding the Credit Balance Report
• Generating and understanding the Patient Balance Report
• Generating and understanding the Provider A/R Totals Report
• Generating and understanding the Practice Advisor Report - Production and Collections

Tip for Streamlining Financial Processes
• Entering finance charges and late charges on individual accounts
• Entering taxes and discounts
• Entering and editing batch payments (redesigned in Dentrix G6)
• Searching for payments using the Search Payments utility
• Making financial notes in Guarantor Notes
• Creating financial patient alerts

Performing Monthly A/R Routines
• Understanding the importance of performing Month End tasks
• Setting up the new G6.6 Reports & Task Scheduler for month end processes
• Applying finance charges and late charges
• Scheduling daily and weekly tasks with the new G6.6 Reports & Task Scheduler

Informing patients of their balances
• Understanding and using billing statement options
• Verifying billing statements to send or print
• Generating individual statements from the Ledger
• Setting up billing statement defaults
• Setting up dunning messages
• Setting up custom billing statement notes