

# ABELDent R&A – Reporting

## Table Reference

ABELDent R&A - Reporting provides access to your ABELDent data via a Power BI dataset containing various tables and fields. This document describes each data table and the high-level information they contain. Not all individual fields are listed in this documentation as many are self-explanatory based on the field name. Special fields that have been calculated/derived from other information and made available for reporting purposes are noted. Table and field relationships are also described.

### Accountholders

Contains information about account guarantors – the person responsible for paying for services provided to any of the members of the account. In ABELDent, an accountholder is a patient that is not “charged to” any other patient.

Relationships:

Accountholders Field	Related to Table	Related to Field
AccountHolderID	Adjustments	Account ID

### Adjusted Revenue

Contains financial information about billings and fee adjustments.

Relationships:

Adjusted Revenue Field	Related to Table	Related to Field
Date	Calendar Table	Date
Location ID	Location	Location ID
Plan ID	Insurance Plans	Plan ID
Practice ID	Provider Details	Dentist ID
Patient ID	Patients	Patient ID

Field Notes:

Adjusted Revenue Field	Notes
Description	A description of the adjustment (e.g., write off) or the procedure code description for bills.
Plan ID	Insurance plan ID. Present if the bill involved insurance.
Plan Name	Insurance plan name. Present if the bill involved insurance.
Carrier ID	Insurance carrier ID. Present if the bill involved insurance.
Carrier Name	Insurance carrier name. Present if the bill involved insurance.
Service Provider	Service Provider ID for the related service.
Service Provider Name	Service Provider name for the related service.
Practice ID	The provider ID of the financial practice involved.

### Adjustments

Contains financial details about adjustments. These include debit and credit adjustments including write-offs, interest, resubmits, NSF cheques, etc.

Relationships:

Adjustments Field	Related to Table	Related to Field
Date	Calendar Table	Date
AccountHolderID	Accountholders	Account ID
Patient ID	Patients	Patient ID
Provider ID	Provider Details	Dentist ID

Field Notes:

Adjustments Field	Notes
Program	The insurance Plan ID if the adjustment involved insurance
Transaction ID	The ABELDent transaction # for the adjustment
Provider ID	The provider ID of the financial practice involved.

## Allergies

Contains patient allergy information. The Allergy table contains all allergies including those that have been marked as Inactive or Deleted.

Relationships:

Allergies Field	Related to Table	Related to Field
Patient ID	Patients	Patient ID

Field Notes:

Allergies Field	Notes
Active	'Yes' if active. 'No' if not.
Deleted	'Yes' if deleted. 'No' if not.
IsNegative	'Yes' when documenting the absence of an allergy. 'No' when documenting the presence of an allergy.

Notes/Tips:

- When searching for patients having allergies, make sure to look for allergies that are Active, not Deleted, and not IsNegative.

## Appointment Cancellations

Contains details on appointment cancellations.

Relationships:

Appointment Cancellations Field	Related to Table	Related to Field
Patient ID	Patients	Patient ID
Cancellation Date	Calendar Table	Date

Field Notes:

Appointment Cancellations Field	Notes
Appointment Date	Date on which the cancelled appointment was scheduled
Cancellation Date	Date and time when the appointment was cancelled by the user
Cancellation Type	'With Notice' if patient cancelled with notice 'Short Notice' if cancelled with very little notice 'Missed' if patient did not provide notice and missed their appt

	'Office' if the cancellation was due to dental office reasons
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## Appointments

Contains details on appointments.

Relationships:

Appointments Field	Related to Table	Related to Field
Patient ID	Patients	Patient ID
Cancellation Date	Calendar Table	Date

Field Notes:

Appointments Field	Notes
Appointment Date	Date on which the cancelled appointment was scheduled
Cancellation Date	Date and time when the appointment was cancelled by the user
Patient Age	Age of patient at the time of the appointment
Patient Age Group	Patient age group (Children, Adults, Seniors) at time of the appointment
State	The appointment state description based on the current state of the appointment. (e.g., Confirmed, Arrived, Seated, etc.)
Recare	'Yes' if the appointment is for recare. 'No' otherwise. i.e., the line 1 work-to-do description is 'rc' or 'sc' or begins with 'rc' or 'sc'.
Days to Book Next Recare Appt	Elapsed days after this recare appointment to book the patient's next recare appt.
Arrival Time	Present if using Patient Manager feature in ABELDent
End of Wait Time	Present if using Patient Manager feature in ABELDent
End of Appt Time	Present if using Patient Manager feature in ABELDent

Notes/Tips:

- The Appointments table does not include information about appointment schedule reservations.

## Bills

Contains financial details about billings.

Relationships:

Bills Field	Related to Table	Related to Field
Date	Calendar	Date
Location ID	Location	Location ID
Plan ID	Insurance Plans	Plan ID
Patient ID	Patients	Patient ID

Field Notes:

Bills Field	Notes
Plan ID	Insurance plan ID. Present if the bill involved insurance.
Plan Name	Insurance plan name. Present if the bill involved insurance.
Carrier ID	Insurance carrier ID. Present if the bill involved insurance.
Carrier Name	Insurance carrier name. Present if the bill involved insurance.

Service Provider	Service Provider ID for the related service.
Service Provider Name	Service Provider name for the related service.
Practice ID	The provider ID of the financial practice involved.
Practice Name	The name of financial practice involved.
Account ID	The Patient ID of the account guarantor.
Transaction ID	The ABELDent transaction # for the bill.

Notes/Tips:

- For reports involving production details, use the Treatments table.

## Billing Codes

Contains list of procedure codes, their description and regular fee.

Relationships:

Bills Field	Related to Table	Related to Field
Code	Treatments	Code

Field Notes:

Bills Field	Notes
Code	Procedure Code
Code Group Category	Category ID of the service (e.g., Dx, Endo, Ortho, Perio, ...)
Code Group Colour	Colour used for that category. Could be used to override default colour schemes in visuals.
Code Group ID	Unique ID of the code group.
Code Group Name	Category name (e.g., Diagnosis, Endodontics, Orthodontics, ...)
Description	Description of the billing code.
Fee	Default fee for the billing code.

## Calendar Table

This table contains all dates from January 1, 1990, to December 31, 2040.

Relationships:

Calendar Table Field	Related to Table	Related to Field
Date	Adjustments	Date
	Predeterminations Sent	Date Sent
	Treatments	Service Date
	Lab Cases	Date Sent
	Appointment Cancellations	Cancellation Date
	Medications	Written Date
	Referrals	Referral Date
	Adjusted Revenue	Date
	Patient Notes	Date
	Treatment Plans	Plan Date
	Payments	Date
	Appointments	Appointment Date
	Bills	Date
Claims	Transmit Date	

	Contacts	Date
	Documents	Creation Date

Notes/Tips:

- Most ABELDent R&A – Reporting tables containing dates. When using multiple visualizations on the same page, Rather than using these specific dates directly in a visualization, use the Date field from the Calendar table – that way, all visuals can react to changes to made to the date range.

## Claims

This table contains details about insurance claims sent via CDAnet/iTRANS.

Relationships:

Claims Field	Related to Table	Related to Field
Transmit Date	Calendar Table	Sent Date
Plan ID	Insurance Plans	Plan ID
Provider ID	Provider Details	DentistID
Patient ID	Patients	Patient ID

Field Notes:

Claims Table Field	Notes
Latest Response	Claims sent via CDAnet/iTRANS can have multiple responses over time. This field contains the most recent response description received to date.
Latest Response Date	Claims sent via CDAnet/iTRANS can have multiple responses over time. This field contains the date the most recent response was received.

## Contacts

This table contains details about patient appointment contacts – i.e., reminders about the need to follow up with patients regarding an appointment.

Relationships:

Contacts Field	Related to Table	Related to Field
Date	Calendar Table	Date
Location ID	Location	Location ID
Provider ID	Provider Details	DentistID
Patient ID	Patients	Patient ID

Field Notes:

Contacts Table Field	Notes
Days on Wait List	The number of elapsed days from the date of the contact to today. Value will be negative if the contact is still in the future.

## Custom Fields

This table contains any user-defined patient fields. Custom fields are a feature available in ABELDent Local+ and Cloud versions.

Relationships:

Custom Fields Field	Related to Table	Related to Field
Patient ID	Patients	Patient ID

Notes/Tips:

- Each field name in the Custom Fields table will be user defined. The only exception is the Patient ID field which is a predefined field.

## Documents

This table contains details about patient documents.

Relationships:

Documents Field	Related to Table	Related to Field
Creation Date	Calendar Table	Date
Provider ID	Provider Details	DentistID
Patient ID	Patients	Patient ID

Field Notes:

Documents Table Field	Notes
Creation Date	The date on the document.
Receipt Date	The date the document was received by the dental practice
DateTimeStamp	The date and time the document was added to ABELDent
State	A document's state can be one of the following: <ul style="list-style-type: none"><li>- Active</li><li>- Inactive</li><li>- Deleted</li></ul>

## Householders

This table contains demographic information about patient that has been identified as the householder in ABELDent. Patient records that have no "Resides With" patient ID specified, are householders.

Relationships:

Householders Field	Related to Table	Related to Field
Householder ID	Patients	Householder ID

## Inactivation History

This table contains patients' inactivation history including reason for being inactivated.

Relationships:

Inactivation History Field	Related to Table	Related to Field
Patient ID	Patients	Patient ID

## Insurance Plans

This table contains information about insurance plans.

Relationships:

Insurance Plans Field	Related to Table	Related to Field
Plan ID	Treatments	Plan ID
	Bills	Plan ID
	Claims	Plan ID
	Patient Insurance Plans	Plan ID
	Payment Details	Insurance Plan ID
	Predeterminations Sent	Insurance Plan ID

## Lab Cases

This table contains details on lab cases that have been sent out for fabrication.

Relationships:

Lab Cases Field	Related to Table	Related to Field
Date Sent	Calendar Table	Date
Patient ID	Patients	Patient ID
Provider ID	Provider Details	DentistID

Notes/Tips:

- This table does not contain laboratory billing information. It holds data related to Lab Case tracking feature of ABELDent.

## Location

For systems that are configured to track multiple locations, this table contains details of each location.

Relationships:

Location Field	Related to Table	Related to Field
Location ID	Treatments	Location ID
	Appointments	Location ID
	Bills	Location ID
	Schedule Reservations	Location ID
	Contacts	Location ID
	Adjusted Revenue	Location ID

## Medications

This table contains details about the medications prescribed to patients or reported by patients. Reported medications are referred to as 'Recorded' medications in ABELDent.

Relationships:

Medications Field	Related to Table	Related to Field
Written Date	Calendar Table	Date
Provider ID	Provider Details	DentistID
Patient ID	Patients	Patient ID

Field Notes:

Medications Table Field	Notes
Entry Type	Can be either "Prescribed" or "Recorded"
Status	Can be either "Active" or "Inactive"

## Patient Form Responses

The table contains patient response details from Clinical Forms feature of ABELDent.

Relationships:

Patient Insurance Plans Field	Related to Table	Related to Field
Create Date	Calendar Table	Date

Field Notes:

Patient Insurance Plans Field	Notes
Form Name	Name of the Clinical Form
Question	The text of the question from the Clinical Form
AnswerResponse Text	The patient response to the form question

## Patient Insurance Plans

The table contains information about patient insurance coverage. E.g., Insurance Company name, policy #, subscriber information etc.

Relationships:

Patient Insurance Plans Field	Related to Table	Related to Field
Plan ID	Insurance Plans	Plan ID
Patient ID	Patients	Patient ID

## Patient Notes

This table contains information about patient notes entered by users.

Relationships:

Patient Notes Field	Related to Table	Related to Field
Date	Calendar Date	Date
Patient ID	Patients	Patient ID

Field Notes:

Patient Notes Table Field	Notes
Category	Can be one of: <ul style="list-style-type: none"><li>- General</li><li>- Financial</li><li>- Medical</li></ul>
Importance	Can be 'High', 'Normal', or 'Archive'

Notes/Tips:



- Table only contains patient notes that are not marked as deleted.

## Patient Support Network

This table contains contact information about the patient's support network or circle-of-care providers.

Relationships:

Patient Support Network Field	Related to Table	Related to Field
Patient ID	Patients	Patient ID

Field Notes:

Patient Support Network Table Field	Notes
Contact Name	The name of the contact
Contact Type	Can be one of: <ul style="list-style-type: none"> <li>- Parent/Guardian</li> <li>- Physician</li> <li>- Emergency</li> <li>- Other</li> </ul>

## Patients

This table contains details about a patient.

Relationships:

Patients Field	Related to Table	Related to Field
Patient ID	Treatments	Patient ID
	Allergies	Patient ID
	Adjustments	Patient ID
	Lab Cases	Patient ID
	Inactivation History	Patient ID
	Predeterminations Sent	PatientID
	Referrals	PatientID
	Medications	Patient ID
	Appointment Cancellations	Patient ID
	Appointments	Patient ID
	Patient Support Network	Patient ID
	Bills	Patient ID
	Patient Insurance Plans	Patient ID
	Scheduling Change Requests	Patient ID
	Contacts	Patient ID
	Custom Fields	Patient ID
	Claims	Patient ID
	Patient Notes	Patient ID
	Treatment Plan Items	Patient ID
	Payment Details	Patient ID
	Treatment Plans	Patient ID
	Adjusted Revenue	Patient ID
	Documents	Patient ID
Dentist ID	Provider Details	DentistID

Field Notes:

Patients Table Field	Notes
Address	If patient resides with another patient, the address of the other patient is used
Postal Code	If patient resides with another patient, the postal code of the other patient is used
Medical Condition	If present, this field will show 'Yes – ' followed by a description of the medical condition.
Premedication	If present, this field will show 'Yes – ' followed by a description of the premedication
Assistance Required	If present, this field will show 'Yes – ' followed by a description of the assistance required
Last Appointment Date	Most recent appointment prior to today
Days Since Last Appt	The number of elapsed days since the patient's Last Appointment Date to now
Next Appointment Date	Next appointment after today
Inactivation Date	If the patient is currently inactive, the date they were inactivated
Last Recall Date	The patient's last recall date as stored in the patient record
Days Since Last Recall	The number of elapsed days since the patient's Last Recall Date to now
Next Recall Date	The date of the patient's next recall appointment after today's date. A recall appointment is one whose first Work-to-Do has a value of 'rc' or 'sc' or begins with 'rc ' or 'sc '.
Last Treatment Date	The date of the patient's most recent treatment on or before today.
Days Since Last Treatment	The number of elapsed days since the Last Treatment Date as compared to today. Reported as -1 if Last Treatment Date does not exist.
Age Group	Based on the age of the patient as of today. Can be one of: <ul style="list-style-type: none"> <li>- Children (17yrs or younger)</li> <li>- Adults (18-64yrs)</li> <li>- Seniors (65yrs or older)</li> <li>- Unknown (if the patient's birthday is unknown)</li> </ul>

### Payment Details

This table contains details of constituent payment transactions that make up a larger payment. For example, if a patient or insurance pays for multiple services with a single summary-level payment, this table contains details of each constituent payment ABELDent created to pay off each service.

Relationships:

Payment Details Field	Related to Table	Related to Field
Insurance Plan ID	Insurance Plans	Plan ID
Patient ID	Patients	Patient ID
Account ID	Accountholders	AccountHolderID

### Payments

This table contains details of summary-level payment transactions. For example, if a patient or insurance pays for multiple services with a single payment, this table contains the details of the single summary-level payment.

Relationships:

Payment Field	Related to Table	Related to Field
Date	Calendar Table	Date
Payment ID	Payment Details	Payment ID

## Predeterminations Sent

This table contains details of predetermination claims sent via CDAnet/iTRANS.

Relationships:

Predeterminations Sent Field	Related to Table	Related to Field
Date Sent	Calendar Table	Date
Insurance Plan ID	Insurance Plans	Plan ID
PatientID	Patients	Patient ID
Provider ID	Provider Details	DentistID

## Productivity

This table contains aggregate appointment and production productivity for each scheduler date, provider, and patient.

Field Notes:

Productivity Table Field	Notes
Production Per Appt	Total production divided by the total number of appointments based on the selected filter criteria (date, provider or provider role, and patient)
Production Per Appt Hour	Total production divided by the total number of appointment hours based on the selected filter criteria (date, provider or provider role, and patient). An appointment hour is based on the total duration in minutes of the appointments in scope divided by 60).

## Provider Details

Contains information about service providers and other financial entities configured in ABELDent.

Relationships:

Provider Details Field	Related to Table	Related to Field
DentistID	Predeterminations Sent	Provider ID
	Adjustments	Provider ID
	Treatments	Service Provider ID
	Medications	Provider ID
	Appointments	Provider ID
	Schedule Reservations	Provider ID
	Contacts	Provider ID
	Documents	Provider ID
	Claims	Provider ID
	Lab Cases	Provider ID
	Treatment Plan Items	Provider ID
	Adjusted Revenue	Practice ID
	Patients	Dentist ID
	Bills	Practice ID

## Referrals

This table contains information about inbound patient referrals as well as inbound and outbound professional referrals.

Relationships:

Referrals Table Field	Related to Table	Related to Field
Referral Date	Calendar Table	Date
PatientID	Patients	Patient ID

Field Notes:

Referrals Table Field	Notes
Type	Can be one of: <ul style="list-style-type: none"> <li>- Inbound Patient</li> <li>- Inbound Professional</li> <li>- Inbound Other</li> <li>- Outbound Professional</li> </ul>
Source ID	ID of the referral source
Source Name	Name or description of the referral source
Destination ID	ID of the referral destination
Destination Name	Name or description of the referral destination
State	Can be one of: <ul style="list-style-type: none"> <li>- Active</li> <li>- Completed</li> <li>- Not Completed</li> <li>- Unknown</li> </ul>

## Schedule Downtime

This table contains information about appointment schedule downtime:

Relationships:

Schedule Downtime Table Field	Related to Table	Related to Field
Appointment Column	Scheduler Columns	Column ID
Appointment Date	Calendar Table	Date

Field Notes:

Schedule Downtime Table Field	Notes
Appointment Column	Appointment schedule Column/Chair ID
Appointment Date	Appointment schedule date
Downtime %	Open Units divided by Available Units times 100
Open Units	Total units that are open a given column/Chair
Max Units	Maximum units in a day (schedule start time to schedule end time) for the given date and column
Reserved Units	Total units that are marked as Reserved/Blocked for the given date and column
Available Units	Total units available for patient appts for the given date and column. I.e., Overall Units less the Reserved Units.
Largest Opening	The largest contiguous number of units that are open for a given date and column

## Schedule Reservations

This table contains information about appointment schedule reservations/blocked time.

Relationships:

Schedule Reservations Table Field	Related to Table	Related to Field
Location ID	Location	Location ID
Provider ID	Provider Details	DentistID

## Scheduler Columns

This table contains information about appointment schedule columns.

Relationships:

Schedule Reservations Table Field	Related to Table	Related to Field
Column ID	Schedule Downtime	Appointment Column

Field Notes:

Scheduler Column Table Field	Notes
Column ID	The appointment column ID
Column Name	The name/description assigned to the column
Column Usual Provider	The Provider ID associated with the column
Usual Provider Name	The name of the provider associated with the column

## Scheduling Change Requests

This table contains details about patient requests for different appointment dates/times.

Relationships:

Scheduling Change Requests Table Field	Related to Table	Related to Field
Patient ID	Patients	Patient ID

Field Notes:

Scheduling Change Requests Table Field	Notes
Current Date / Current Time	The patient's existing appointment date and time
Preferred Date From/To	The patient's preferred appointment date range
Preferred Time From/To	The patient's preferred appointment time range
[Sunday-Saturday] Preferred	Indicates which days of the week the patient prefers

## Treatment Plan Items

This table includes treatment details for treatment plans.

Relationships:

Treatment Plan Items Table Field	Related to Table	Related to Field
Provider ID	Providers	DentistID
Patient ID	Patients	Patient ID
TreatmentPlanID	Treatment Plans	TreatmentPlanID

Field Notes:

Treatment Plan Items Table Field	Notes
TreatmentPlanID	The unique ID of the associated treatment plan
Completed Date	The date this planned treatment was completed. Note: This is determined based on the presence of a billed service involving the same procedure code and tooth # on or after the planned date.
Treatment Duration	Number of elapsed days from the planned date to the completed date.
Category	The planned procedure code category. Can be one of: <ul style="list-style-type: none"> <li>- Diagnostic</li> <li>- Preventative</li> <li>- Restorative</li> <li>- Endodontic</li> <li>- Periodontic</li> <li>- Prosthodontic - Removable</li> <li>- Prosthodontic - Fixed</li> <li>- Oral and Maxillofacial Surgery</li> <li>- Orthodontics</li> <li>- Adjunctive</li> </ul>

Notes/Tips:

- The Completed Date and Duration values are approximations. Patients that have alternate procedure codes billed instead of the originally planned service may impact the determination of an item's completed date. Additionally, treatment plan items for patients that have the procedure code performed subsequently, but not as part of the treatment plan, will be listed as if the item was completed as part of the treatment plan.

## Treatment Plans

This table includes details of patient treatment plans.

Relationships:

Treatment Plans Table Field	Related to Table	Related to Field
Plan Date	Calendar Table	Date
TreatmentPlanID	Treatment Plan Items	TreatmentPlanID
Patient ID	Patients	Patient ID

Field Notes:

Treatment Plans Table Field	Notes
Plan Date	The date on which the plan was created
Plan Num	A sequence number indicating successive treatments plans for a patient.
Plan Status	Can be one of: <ul style="list-style-type: none"> <li>- Activated</li> <li>- Accepted</li> <li>- Completed</li> <li>- Rejected</li> </ul>

	- No Status
Treatment Start Date	For plans in a state of Accepted or Completed, the earliest date on which any treatment in the plan was billed.  Note: This is determined based on the presence of a billed service on or after the Plan Date that matches any of the planned treatments.
Treatment End Date	For plans in a state of Completed, the latest date on which any treatment in the plan was billed.  Note: This is determined based on the presence of a billed service on or after the planned date that matches any of the planned treatments.
Plan Duration	The number of elapsed days from the Plan Date to the Treatment End Date.

Notes/Tips:

- Treatment Start/End Dates values may not be accurate. Patients that are billed services that match the procedure code and tooth # of an item on the treatment plan, but are otherwise not part of the treatment plan, will falsely indicate the treatment plan has been started or ended.

## Treatments

This table includes details of patient treatments that have been billed.

Relationships:

Treatments Table Field	Related to Table	Related to Field
Plan ID	Insurance Plans	Plan ID
Code	UniqueCodes	Code
Patient ID	Patients	Patient ID
Service Provider ID	Providers	DentistID
Location ID	Location	Location ID
Service Date	Calendar Date	Date

Field Notes:

Treatments Table Field	Notes
Location ID	The ID of the location where the treatment was performed.  Note: This is determined using the location of the first appointment the patient has on the same date as the Service Date.
Location Name	The description of the location where the treatment was performed.  Note: This is determined using the location of the first appointment the patient has on the same date as the Service Date.
Patient Age	Age of patient at the time of the treatment

Patient Age Group	Patient age group (Children, Adults, Seniors) at time of the treatment
Category	The procedure code category. Can be one of: <ul style="list-style-type: none"> <li>- Diagnostic</li> <li>- Preventative</li> <li>- Restorative</li> <li>- Endodontic</li> <li>- Periodontic</li> <li>- Prosthodontic - Removable</li> <li>- Prosthodontic - Fixed</li> <li>- Oral and Maxillofacial Surgery</li> <li>- Orthodontics</li> <li>- Adjunctive</li> </ul>
Plan ID	The ABELDent insurance plan ID that the treatment was most recently billed under (if insurance assignment and receivables is being tracked in ABELDent).
Recare	Indicates whether this treatment was related to a recare visit. 'Yes' if the treatment procedure code is identified to 'Generate Recall' or has a 'Post-Visit Rule' ending in 'sc' configured in the Master Fee Schedule.
Service Provider Role	Identifies whether the treatment was performed by a 'Dentist' or a 'Hygienist'.  Note: If the treatment service provider is the same as the treatment responsible provider, the provider role will be 'Dentist. Otherwise, the provider role will be 'Hygienist'.
Service Type	Can be one of: <ul style="list-style-type: none"> <li>- Lab If the procedure code is configured as 'Depends on Other Code' in the Master Fee Schedule.</li> <li>- Consumable If the procedure code is configured as 'Consumable' in the Master Fee Schedule.</li> <li>- Professional If the procedure code service type is not 'Lab' or 'Consumable'.</li> </ul>

Notes/Tips:

- Does not include planned treatments.