

CUSTOM REPORTS LIST

ACCOUNTING

- AR-001 AR aging by patient - insurance balance only
- AR-002 AR aging by patient - patient balance only
- AR-003 AR aging for active patients - patient & insurance balances
- AR-004 AR aging with service location - patient and insurance balances
- AR-005 AR Summary by patient in date range
- AR-006 Daysheet charges and payments only
- AR-007 Daysheet HIPPA - no names
- AR-008 Insurance write offs by specific patient, specific insurance in date range
- AR-009 Open balance grouped by service location (patient & insurance) in date range
- AR-010 AR by Insurance Carrier - *NEW*

APPOINTMENTS

- AP-001 Appt. (inc ins in date range)
- AP-002 Appt by specific lname and fname in date range
- AP-003 Appt by specific resource in date range - order by date
- AP-004 Appt by specific resource in date range - order by name
- AP-005 Appt by specific type in date range
- AP-006 Appt detail in date range
- AP-007 Appt info for one specific patient beyond date range
- AP-008 Appt with patient balance in date range
- AP-009 Cancelled appt, next appt of any type in date range
- AP-011 Exam appt counts by resource in date range
- AP-012 Future appt by specific resource in date range - order by date
- AP-013 Future appt by specific resource in date range - order by name
- AP-014 Standard and xray appt in date range
- AP-015 Standard appt in date range
- AP-016 Standard appts - no cancels - in date range
- AP-017 Visited appt count by type in date range
- AP-018 Appt based on Resource - *NEW*

CHARGES SERVICES

- CS-001 Charge payment activity with svc info by specific pat# or name in date range
- CS-002 Charge payment activity with svc info in date range
- CS-003 Charges by specific case type in date range
- CS-004 Charges in date range
- CS-005 Charges with svc info by specific case#, specific patient, specific pro in date range
- CS-006 Charges with svc info by specific patient and specific insurance in date range
- CS-007 Charges with svc info by specific patient in date range
- CS-008 Charges with svc info by specific svc location in date range
- CS-009 Charges with svc info, employer in date range
- CS-010 Patient charge total by date in date range
- CS-011 Patient charge, payment, and balance totals by specific insurance
- CS-012 Patient last charge, last payment and balance summary in date range
- CS-013 Services by specific code in date range
- CS-014 Unpaid charges by specific insurance in date range
- CS-015 Unpaid charges in date range
- CS-016 Unpaid charges with service info by specific insurance in date range
- CS-017 Unpaid charges with service info by specific location in date range
- CS-018 Unpaid charges with service info by specific patient, prv & case type in date range
- CS-019 Unpaid non-insurances services in date range

CLAIMS

- CL-001 Claims activity in date range
- CL-002 Claims by specific case type in date range
- CL-003 Claims by specific insurance carrier in date range
- CL-004 Claims in specific batch number
- CL-005 QuickPrint claims in date range
- CL-006 Unpaid claims by specific insurance in date range

INSURANCE

- IN-001 Codes paid by all insurance carriers in date range
- IN-002 Insurance balance by specific service code, specific insurance carrier
- IN-003 Patient count grouped by insurance carrier for file date in date range
- IN-004 Visit counts grouped by insurance carrier in date range

PATIENT INFO

- PT-001 Active male patients over 45
- PT-002 Active patient name and phone number with copay
- PT-003 Active patients by specific case type
- PT-004 All patients last payment, last charge date, balance
- PT-005 File notes for specific patients in date range
- PT-006 Individual and head/house mailing list
- PT-007 Patient activity summary for ONE specific insurance carrier in date range
- PT-008 Patient and case type by specific CPT code in date range
- PT-009 Patient copay by insurance carrier
- PT-010 Patient info - Address, dob, gender, end of record on each row
- PT-011 Patient info - address, ph, email, dob, and provider
- PT-012 Patient info - address, phone, gender, dob, ssn, ins
- PT-013 Patient info - email
- PT-014 Patient insurance coverage by specific patient
- PT-015 Patient last payment and balance
- PT-016 Patient last visit report
- PT-017 Patient mailing address
- PT-018 Patient mailing address by specific insurance carrier
- PT-019 Patient mailing address in date range
- PT-020 Patient mailing address - today's new patients
- PT-021 Patient search by month of birth
- PT-022 Patient search by specific date of birth
- PT-023 Patient search by specific lname, specific fname, specific dob
- PT-024 Patient soap notes by specific patient in date range
- PT-025 Patient tx and dx codes by specific insurance carrier in date range
- PT-026 Patient with second insurance carrier
- PT-027 Patient with charge in date range
- PT-028 Patient with charge in last 2 years
- PT-029 Patient with charge on or since last appointment
- PT-030 Patient with charges on file date in date range
- PT-031 Patient with no appointment or charge in date range
- PT-032 Patient with no case type
- PT-033 Patient with non insurance services
- PT-034 Patient with service in date range
- PT-035 Patient with specific secondary insurance carrier
- PT-036 Patient without an appointment in 365 days
- PT-037 Visit count by patient

PAYMENTS

- PY-001 All payments and adjustments in date range
- PY-002 All payments by specific case type, specific patient, specific provider
- PY-003 All payments by specific check # in date range
- PY-004 All payments by specific insurance carrier in date range
- PY-005 All payments by specific key word in payment notes in date range
- PY-006 All payments by specific service location in date range
- PY-007 All payments grouped by referring provider in date range
- PY-008 All payments grouped by service location in date range
- PY-009 All payments grouped by type and payment in date range
- PY-010 All payments in date range
- PY-011 All payments including patient employer by specific patient, specific payment method
- PY-012 All payments including tx and dx codes in date range
- PY-013 All payments subtotaled by type in date range
- PY-014 All payments with dos by specific patient, specific provider in date range
- PY-015 Insurance payments and write offs in date range
- PY-016 Insurance payments by specific case type in date range
- PY-017 Insurance payments by specific check # in date range
- PY-018 Insurance payment details with cpt by specific insurance, specific patient in date range
- PY-019 Insurance payments grouped by insurance in date range
- PY-020 Insurance payments summary by specific insurance, specific patient in date range
- PY-021 Patients payments and balance adjustments by specific patient in date range
- PY-022 Patient payments by specific patient in date range
- PY-023 Percentage of patient and insurance charges paid in date range

REFERRALS

- RE-001 Count of referrals by referring physician on case 001 in date range
- RE-002 Count of referrals by referring physician on patient info
- RE-003 How referred for patients with first charge in date range
- RE-004 Patients referred by other patients with file dates in date range
- RE-005 Patients referred by providers with file date in date range
- RE-006 Referring provider and secondary identifiers
- RE-007 Visit counts of patients referred by provider in date range

SERVICE CODES

- SC-001 Service code count and \$ total in date range
- SC-002 Service code count by patients in date range
- SC-003 Service code count by specific case type in date range
- SC-004 Service code count by specific service code in date range
- SC-005 Service code count grouped by location in date range
- SC-006 Service code stats grouped by code in date range

CUSTOM MARKETING (labels, postcards, reports, etc.) - *NEW*

- MR-001 Patient list by specific state