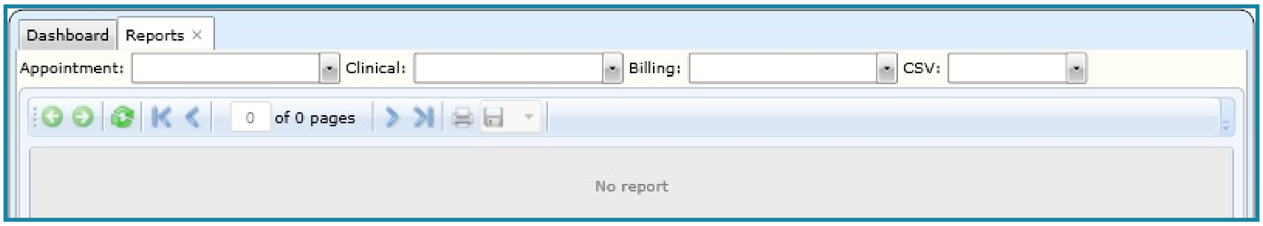
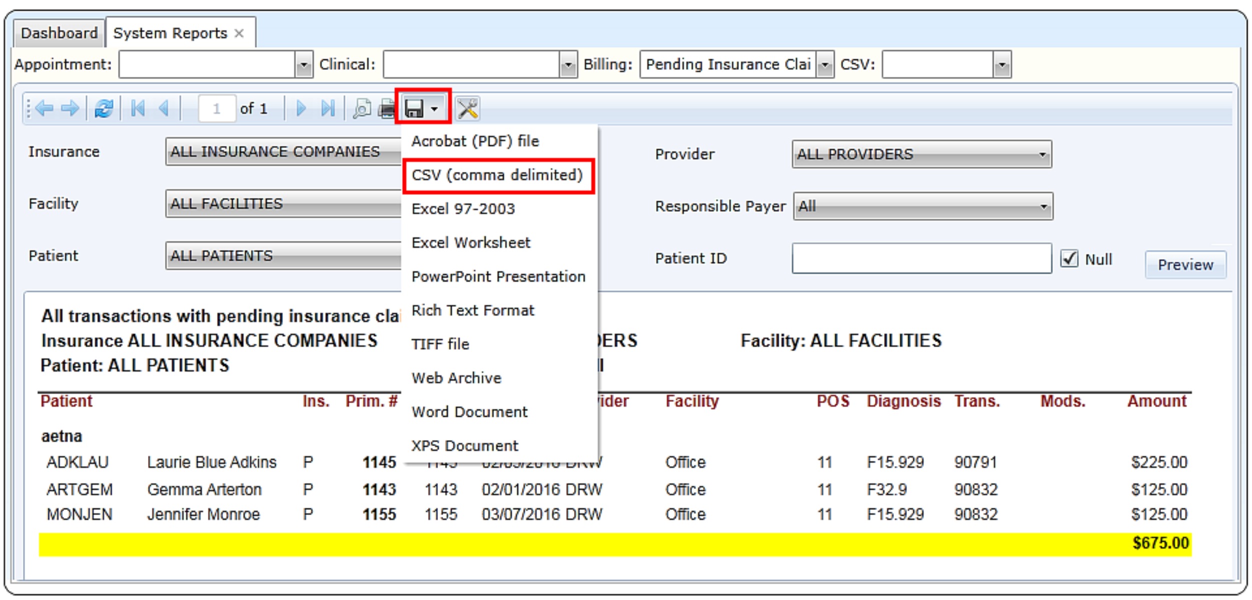
Reports – Regional Training Cheat Sheet

To generate reports click on **Tools** | **Reports**. There are four pull-down lists of choices **Appointment, Clinical, Billing,** and **CSV**.



Please be aware that any report can be exported to Excel.

Exporting to CSV will enable you to manipulate the data (recommended):



Appointment Reports

Appointment Reminders Status
This report is used to view the latest information and status related to the automated Appointment Reminders that have gone out to patients.

Appointments
This report provides a general list of appointments and their details, which can be sorted by date range.

Appointments with Signed Clinical Notes
This report provides a list of appointments that have been signed along with finished, clinical notes attached to them.

Audit Log-Appointment
This report provides a list of all changes made to appointments (creation, deletion, etc.) and states which user performed each action.

Biller Appointments
This report provides a list of appointments along with all relevant billing information like diagnosis, place of service, duration, and a few others. This report is useful for an outside billing service that requires a list of appointments.

Today’s Appointments
This report lists all appointments for the day.

Unbilled Appointments
This report lists all appointments that have not been recorded as complete, but no charges were created for them.

Undocumented Appointments
This report lists all appointments that do not yet have a clinical note started. If a note has been started, but not signed, the appointment will be listed in the Unsigned Documents report found in the Clinical reports.

Clinical Reports

Audit Log-Patient
This report provides a list of all changes made to the patient's data and also states which user performed the action.

Audit Log-User Access

This report provides a list of who has been accessing the EHR and when they accessed it.

Diagnoses-DSM

This report provides a list of patients with a given DSM diagnosis. This report is very useful for Meaningful Use Menu Objective #5.

Diagnoses-Patient

This report provides a list of diagnoses for one patient at a time or for all patients.

Facesheets

This report displays all demographic information for one patient at time or for multiple patients.

Faxes Status

This report provides a status about the transmission of all faxes sent out using the EHR.

Medication History

This report provides a list of all the past medications entered into the EHR for a specific patient.

Medications

This report lists all active medications for one patient or for all patients.

Multi-Signer Status

This report gives a status update on all of the documents that are utilizing multiple signers. This report outlines who has and has not yet completed their role in the document's workflow.

Patient Activity

This report provides a list of patients and when their last visit took place.

Patients

This report provides a generic list of patients, which can be filtered by Patient Type, Assigned Provider, or Assigned Facility.

Patients Missing Meaningful Use Information (When provisioned)

This report provides a list of patients who are missing Meaningful Use related demographics. This information is located under Persons and Institutions | Patients | Select a Patient | Misc. Tab and also includes their smoking status which is recorded in the Patient Chart as a Measurement.

Unsigned Documents

This report provides a list of all documents that have been saved, but not signed.

Adjustment Breakdown
This report will list all adjustments over a given date range.

Audit Log-Billing
This report provides a list of all charges created, modified, or deleted, and which user performed the action.

Audit Log-ERA
This report lists all of the transactions associated with a given ERA file that have been applied to the system.

Charges
This report provides a list of charges, their description, and the amount. This report can be filtered by patient, facility, provider, among other items.

Claims Submission
This report provides a complete list of claims that have been submitted electronically as well as a list of paper claims that have been marked as printed after creation.

Combined Aging
This report combines the Patient Aging and Insurance Aging reports together into one single report.

Deposits
This report provides a list of cash or check payments.

Fee Schedule – Appointment Productivity
This report calculates expected charges for scheduled appointments based on fee schedules (or default charges).

Fee Schedule – Outstanding Charge Productivity
This report calculates expected payments for existing transactions for which a payment has not yet been posted; based on fee schedules (or default charges)

Fees
This report provides a complete list of the practice’s fee schedule per transaction code.

Guarantors to Patients
A report that lists guarantors and their patients responsibility.

Insurance Aging
The report provides a list of outstanding insurance claims where a payment has not been posted. This report can be sorted by aging bucket to include/exclude claims of a certain age.

Insurance Aging Summary

This report provides a list of outstanding insurance claim balances sorted by Insurance Company. This report is useful for seeing which payers have the highest unpaid claims balances.

Insurance Authorizations

This report provides a list of authorizations and it is sorted by the Insurance Company that has issued them.

Insurance Summary

This report displays a list of patients that can be sorted by insurance company. This report will also display copay and visits remaining for each patient.

Itemized Cash Payments

This report provides a detailed list of all cash payments and the report can be sorted by date range.

Outstanding Transactional Copays

This report displays all information pertaining to the patient balance for each transaction. It is useful for tracking down past unpaid or underpaid copay amounts, particularly for transactions where the copay or coinsurance entered in Valant may differ from what was reported on an ERA.

Patient Aging

This report provides a list of outstanding patient responsibilities where a patient payment has not been posted. This report may be sorted by aging bucket to include/exclude responsibilities of a certain age.

Patient Aging Summary

This report shows total accounts receivable for each patient.

Patient Copays

The report provides a list of copayments by CPT code when the optional Copay Schedule is enabled.

Payment Break Down

This report provides a list of ALL payments of ANY kind.

Payments, Refunds and Adjustments

This report lists all patient and insurance payments, refunds, and adjustments by both amount and as a percentage of total. Payments, Refunds, Credit Adjustments, and Charge adjustments will each have a separate page.

Pending Insurance Claims

This report provides a list of transactions that have not had a claim submitted electronically or been marked as printed, yet.

Pre-payments
This report lists all pre-payments and pre-payment transfers for a specified date range

Productivity
This report can be used as a guide to the amount of revenue generated per provider.

Productivity by Insurance
This report shows generated revenue categorized by insurance company

Productivity by Insurance Details
This report shows generated revenue and is broadly categorized by insurance company and further categorized by transaction code within each insurance company section. This report includes charge and payment information both as amount and as percentage of whole

Productivity-Estimated
This report shows a list of future charges that have not been created yet, but will be if the appointments are recorded as complete.

Statement Delivery
This report lists the method by which a statement was delivered to a patient.

Transaction Journal
This report shows a list of all transactions for each patient and it includes those billable to insurance.

Transactions
This report shows a list of all transactions for each patient, but it cannot be filtered by Insurance Company.

Unassigned Payments
This report provides details of payments processed in an ERA file, but we listed as unassigned. Merge.

Reports CSV

Facesheets
This report exports all patient demographic data into a comma-separated-value (CSV) spreadsheet that can be opened in Microsoft Excel. This report can be used as a data source for a Microsoft Office Mail.