



# User Group Meeting 2021

Let's Have Some Fun!

## Reports

### Where can I find that info?

We can help! We have provided a brief description of each report and how you can get to it. If you are looking for something specific, you can always reach out to our support team and we will be happy to assist.

### Inventory Reports

View Reports > Inventory Reports dropdown

- **Inventory In Stock:** This report shows the inventory on hand. It can be broken down by vendor and location.
  - It can be used if a list of everything in stock is needed or if the user is looking for a particular frame. It is also a great resource to use when meeting with frame reps to verify inventory.
    - Hint: Based on invoice date.
- **Inventory Status:** This report shows how long a frame has been part of the inventory, as well as its current status. This report is designed for use when looking for a specific status and date range.
  - If **Get Detailed Status Report** is checked, the user will also see the entire history of the frame. (Added, Ordered, Received, Dispensed, Returned, Cancelled, etc...)
  - It can be used to pinpoint frames that haven't sold through and can also be helpful when looking at how many frames were sold in a certain time frame of a particular brand.
    - \*Will generate faster if criteria are selected. Selecting all can take a long time and will be unmanageable. \*

### Frame Inventory Audit

View Frames > Inventory Audit

- **New Inventory Audit:** Performing an audit of frames on hand is a great way to maintain control of the inventory.



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## Order and Charge Reports

View Reports > Order and Charge Reports dropdown

- **Lab Orders Report** – This report shows the orders by status.
  - This could be helpful if the user was looking for all orders in a specific status. For example, the user wanted to see all orders that were *Waiting on Frame*.
- **Lab order detail:** This report provides a breakdown of the order by charge line.
- **Order Charges and Payments:** This report shows the orders with expanded information about the payments that were made on each line.

## Payments Reports

View Reports > Payments Reports dropdown

- **Payment CC Transactions** – This report will breakdown each card type by PT ID# and line items.
- **Additional Open Edge Payments Details**
  - Transaction Details: This report provides each individual credit card transaction completed.
  - Transaction Totals: This report provides totals for Visa, MasterCard, Discover and AMEX payments.
  - Credit Card Totals: This report shows purchases and returns for all card types including count and total.
  - CC Totals By Day: This report provides totals for all cards, a combination of cards, and individual card types by day.
  - CC Totals By Location: This report provides totals for all cards, a combination of cards, and individual card types by location.
- **Payments and Adjustments Report** – This report shows payments and adjustments by transaction type.
- **Payments and Adjustments by Patient Report** – This report shows payments and adjustments per patient and transaction type.



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## Unpaid Claims Report

View Reports > Unpaid Claims Report

- **New Unpaid Claims Report** - This report can be used to work through unpaid claims.
  - Helpful to build for specific insurances, one at a time.
    - Smaller reports work best.
- **Show Open Reports** - This will show the unpaid claims reports that are being worked on.

## Claims

EDI > Claims dropdown

- **Month/Year End**- Reviewing your Month End Analysis Report helps you analyze your cashflow.
  - Helpful to check anytime during the month to see how the month is doing.
- **Analysis Report**- This report is similar to month end and is another tool to help you analyze your cashflow.
  - This report does not clear out every month.
  - This will show any changes made after your month end has been run.
    - It is not designed to match your end of month.
- **A/R Report** – This report shows all outstanding patient and insurance balances.
  - This report is helpful when looking at patient open balances or specific insurance balances.
    - \*Make sure to use the funnels to filter depending on what you are looking for.
- **Transaction report**- This report is based on finalized dates and shows production.
  - The user can specify certain transaction codes.
  - Allows the user to search for specific payment or adjustment types.
    - Ex: Many clinics use this report to calculate pay for a specific doctor.



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## Remittance

EDI > Remittance dropdown

- **Check Remits Info**- This area shows remit files.
  - The user can view all, posted, and archived remits from this screen.
  - This is where the user will post electronic remits.
- **Follow Up Payments** – This area is used for working any payments that did not automatically post from the Remit Information screen.

## Schedule Reports

Calendar > Report dropdown

- **Daily Appointment Report Type 1** – This displays a portrait view of the schedule.
- **Daily Appointment Report Type 2** – This displays a landscape view of the Schedule
- **Encounter Forms Report** – This area is used to print encounter forms (customer-built template) based on criteria.
- **Appointment Status Report** – This report allows the user to search for a list of patients in a specific time frame whose appointments have been cancelled, marked as no show, overridden, or rescheduled.
- **Appointment Status Details Report** – This report allows the user view a list broken down by resource/provider, scheduling code, and location.
- **Scheduling Report** – This report allows the user to view report broken down by providers, appointment types, and scheduling locations.
- **Recalls report** – This will display a list of recalls.
  - This report cannot be accessed if you use 4PatientCare for your recalls and reminders.
- **Recall List** – This report shows a list of recalls that are set in the system.