Standard Reports

Last Modified on 09/22/2021 4:01 pm EDT

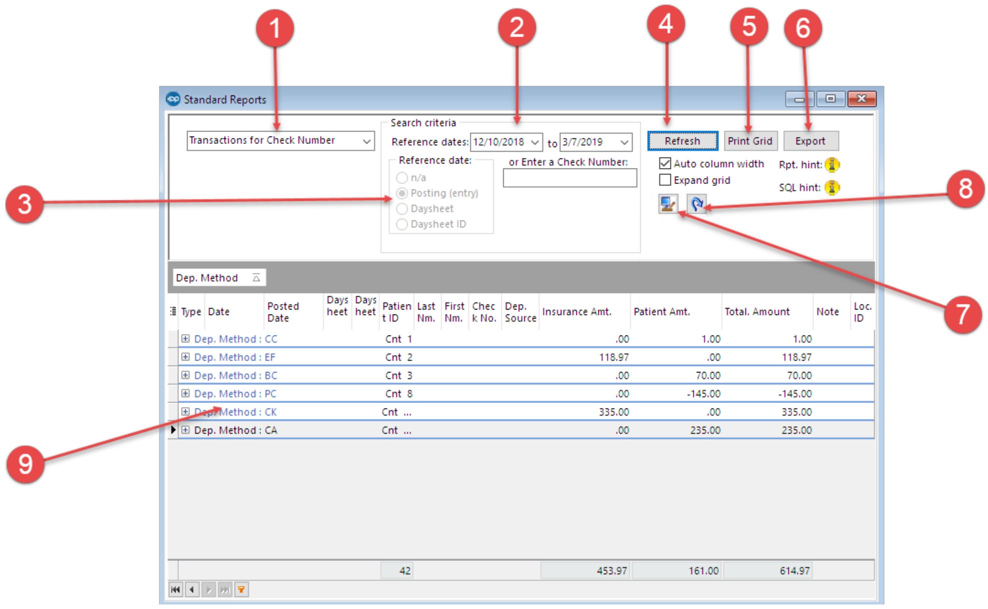
Version 14.19

This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the ***Related Articles*** *section at the bottom of this page.*

About Standard Reports

Path: Billing tab > Transactions button > Standard Billing Reports

The Standard Reports window helps users view a quick summary of the office's productivity. These reports display information that has been daysheeted.



Standard Reports Map

Number	Section	Description
		The Choose a report drop-down selects one of the available reports to display in the standard reports grid. These reports include: • **Transactions for check number**: Displays all transactions associated with a check number. Use this report to review EOBs/ERAs and balance funds received, especially when there are complex elements such as recoups/take-backs. • **Financial Summary**: Displays charges, adjustments, and receipts for your chosen date range. Includes non-daysheeted transactions. Use this report to balance money entered into Office Practicum against deposits into your bank account. • **Charges per scheduled appointment**: Displays the total charges for appointments on the schedule in three levels of details. Level 1 displays the totals for all appointments grouped by date. Level 2 breaks down the totals by the type of appointment. Level 3 breaks down the appointment type totals into data for individual patients. Use this report to review your practice productivity by comparing

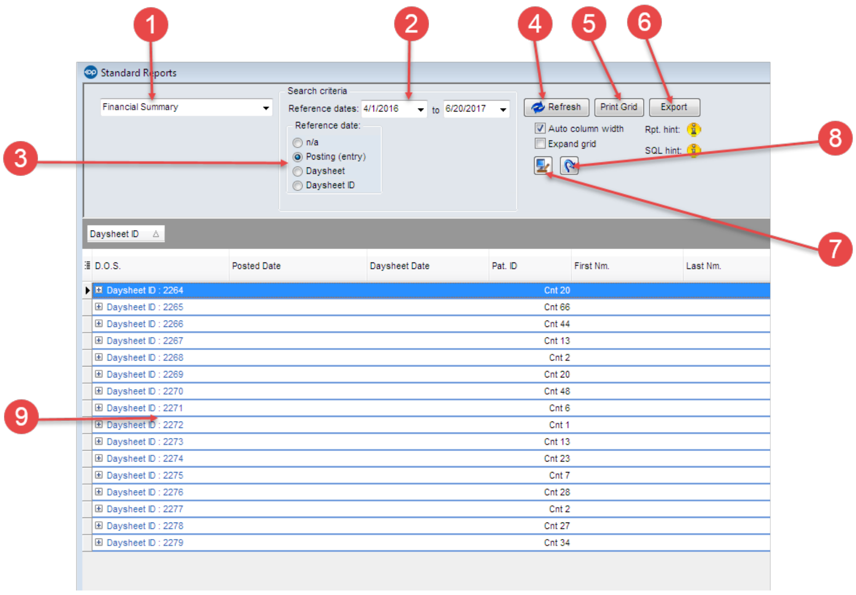
1	Choose a report	charges billed to the appointment type scheduled. You can also use this report as an unbilled charges report to make sure that visits billed are appropriate for the visits scheduled. • **Unbilled charges for scheduled appointments**: Displays the scheduled appointments for patients that do not have an associated superbill or charge transactions for the appointment date. • **Reimbursement per visit**: Displays all daysheeted transactions for a patient visit. The patient visit is defined as all transactions for a patient on a given date. The highest numbered CPT code represents the type of visit or reason for the visit. • **Scheduled appointments**: Displays information for the scheduled appointments for a selected date range. The information includes location, verified, type of visit, appointment date, encounter template used, visit status, confirm status, and staff ID. • **Compare allowable to payment**: Displays the estimated reimbursement/payer allowable for a change along with the actual amount of the payment from the insurance company. It should be noted that there is a year limit for the date range. If the start and end date exceed 365 days, the end date will be modified to be a year later than the start date.
2	Reference dates (range)	The Reference Dates set the start and end date for the displayed report's date range. Reports that meet the criteria and fall within the selected date range will appear in the standard reports grid.
3	Reference Date (type)	The Reference Date type selects the transactions based on charge/payment, posting (entry), daysheet, or Daysheet ID. Please note that some reports will not allow for these selections.
4	Refresh button	The **Refresh** button refreshes the data in the standard reports grid.
5	Print Grid button	The **Print Grid** button prints or exports the standard reports grid as it appears. You can print a paper or PDF copy of the report. The report will open in Print Preview mode. In Print Preview mode, you can choose to print the report or export to PDF. If you export to PDF, you will be given some options regarding how you would like to save the image. Remember that when saving practice sensitive information or any kind of PHI outside of OP, you should consider who has access to the information you are saving. You can add a password to the PDF you are saving by going to the Security Tab, checking the box that says Enabled and Adding a User Password or you can choose to protect your data in some other way within your own network
6	Export button	The **Export** button exports the data shown in the standard reports grid as an .xls or .csv file.
7	Preferences button	The **Preferences** button saves the window and grid preferences.
8	Reset Preferences button	The **Reset Preferences** button resets the default window and grid preferences.
9	Standard reports grid	The Standard Reports grid displays the selected report based off the search criteria. Information in this grid can be filtered, sorted, and grouped to display the information as you need it to be shown.

Version 14.10

About Standard Reports

Path: Reports Menu > Standard Reports (Keyboard Shortcut keys: [Alt][R][S])

The Standard Reports window helps users view (with seven simple dropdown reports) a quick summary of the office's productivity. These reports display information that has been daysheeted.



Standard Reports Map

<table>
<tr><th>Number</th><th>Section</th><th>Description</th></tr>
<tr><td>1</td><td>Choose a report</td><td>The Choose a report dropdown selects one of the six available reports to display in the standard reports grid. These reports include:

Transactions for check number: Displays all transactions associated with a check number. Use this report to review EOBs/ERAs and balance funds received, especially when there are complex elements such as recoups/take-backs.
Financial Summary: Displays charges, adjustments, and receipts for your chosen date range. Includes non-daysheet transactions. Use this report to balance money entered into Office Practicum against deposits into your bank account.
Charges per scheduled appointment: Displays the total charges for appointments on the schedule in three levels of details. Level 1 displays the totals for all appointments grouped by date. Level 2 breaks down the totals by the type of appointment. Level 3 breaks down the appointment type totals into data for individual patients.Use this report to review your practice productivity by comparing charges billed to the appointment type scheduled. You can also use this report as an unbilled charges report to make sure that visits billed are appropriate for the visits scheduled.
Unbilled charges for scheduled appointments: Displays the scheduled appointments for patients that do not have an associated superbill or charge transactions for the appointment date.
Reimbursement per visit: Displays all daysheet transations for a patient visit. The patient visit is defined as all transactions for a patient on a given date. The highest numbered CPT code represents the type of visit or reason for the visit.
Scheduled appointments: Displays information for the scheduled appointments for a selected date range. The information includes location, verified, type of visit, appointment date, encounter template used, visit status, confirm status, and staff ID.
Compare allowable to payment: Displays the estimated reimbursement/payer allowable for a change along with the actual amount of the payment from the insurance company. It should be noted that there is a year limit for the date range. If the start and end date exceed 365 days, the end date will be modified to be a year later than the start date.
</td></tr>
</table>

2	Reference dates (range)	The Reference Dates set the start and end date for the displayed report's date range. Reports that meet the criteria and fall within the selected date range will appear in the standard reports grid.
3	Reference Date (type)	The Reference Date type selects the transactions based on charge/payment, posting (entry), daysheet, or Daysheet ID). Please note that some reports will not allow for these selections.
4	Refresh button	The **Refresh** button refreshes the data in the standard reports grid.
5	Print Grid button	The **Print Grid** button prints or exports the standard reports grid as it appears. You can print a paper or PDF copy of the report. The report will open in Print Preview mode. In Print Preview mode, you can choose to print the report or export to PDF. If you export to PDF, you will be given some options regarding how you would like to save the image. Remember that when saving practice sensitive information or any kind of PHI outside of Office Practicum, you should consider who has access to the information you are saving. You can add a password to the PDF you are saving by going to the Security Tab, checking the box that says Enabled and Adding a User Password or you can choose to protect your data in some other way within your own network
6	Export button	The **Export** button exports the data shown in the standard reports grid as an .xls or .csv file.
7	Preferences button	The **Preferences** button saves the window and grid preferences.
8	Reset Preferences button	The **Reset Preferences** button resets the default window and grid preferences.
9	Standard reports grid	The Standard Reports grid displays the selected report based off the search criteria. Information in this grid can be filtered, sorted, and grouped to display the information as you need it to be shown.