Introduction to Reports

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Version 21.3

Office Practicum has three types of reports.

Practice Analytics Reporting in Office Practicum

The Practice Analytics Reporting tool built into Office Practicum can be accessed from Tools > Reporting on the main toolbar. Practice Analytics is made up of dozens of user-friendly reports and dashboards, and they offer the insights your practice needs: neatly packaged and easily accessible, all from one centralized location.

- **Practice Analytics Reports**: These reports are available to everyone who uses Office Practicum, and are more advanced versions of the reports listed below (Reports toolbar). See the Comparison Chart for more information.
    - **Scheduling Reports**: Include reports on Scheduled Appointments, such as Charges per Scheduled Appointment, Reimbursement per Scheduled Appointment, Scheduled Appointments, and Unbilled Charges for Scheduled Appointments.
    - **Daily Reports**: Include reports your practice can run for daily patient and financial information, such as Patient Credit Account, Practice Level Adjustments, Transaction Analysis, and Transaction for Check Number.
    - **Daysheet Dependent**: Includes reports that are daysheet dependent, such as Account Transfers, Daysheet Log, Receipts for Deposit, Total Receipts, and Void Transactions only.
    - **Monthly Reports**: Includes reports that you practice can run on a monthly basis, such as Compare Allowable to Payment, Financial Summary, and Reimbursement Analysis.
    - **Accounts Receivable Aging Analysis**: Include 11 types of A/R Aging reports to report both insurance and patient A/R, in sections of Rendering Provider, Location, and Insurance.
    - **General Reports**: Coming Soon!
    - **Analytics**: Includes a Dashboard for your Practice Overview. Use this dashboard for high level overview of charges/payments/adjustments, claim denials, and compare your A/R against the MGMA Benchmarks.
- **Financial Analytics**: These dashboards are available as a contracted feature. More information coming soon!
- **Clinical Analytics**: These dashboards are available as a contracted feature. More information coming soon!

Reports in Office Practicum

The reports built into Office Practicum can be accessed from Reports on the main toolbar. These reports offer predefined parameters and cannot be easily modified.

- **Demographic Analysis and Recall** - Uses a demographic list to generate various types of recall reports.
- **Vaccine Inventory Forecast** - Displays the available vaccines and provides an estimates stock count based upon if the vaccine will be administered at certain ages.
- **Grid Analysis of Immunization Records** - Displays a list of patients who have received a particular vaccine.
- **Review CPT Occurrence** - Generates a graph, showing the occurrence of specific CPT Codes.
- **Daysheet Log** - Generates a Daysheet report and includes the date daysheet was processed, the effected date, and financials such as charges, payments, and adjustments for individual daysheets.
- **Standard Reports** - Houses 7 commonly used reports used to report a practice's productivity.
- **Billing Transaction Analysis** - The most versatile of the Billing Reports; it contains over 80 different fields you can add or remove to report on financial transactions for your practice.
- **Reimbursement Analysis** - Displays payment information to review insurance, patient payments, and adjustments made to the practice.
- **Review Receivables** - Generates a list of transactions where the balance is greater than 0.
- **A/R Aging Analysis** - Include 11 types of A/R Aging reports to report both insurance and patient A/R and is organized by aging buckets.

- **Historical A/R Analysis** - Generates 4 type of reports that show trends in A/R totals.
- **Proof Patient Accounts** - Contains a utility to run to proof all patient account balances on transactions and to update A/R figures.

Reports in OP Reports (Reports Builder)

These reports are created using the OP Reports program, and can be easily accessed and modified.

The following reports are **generated using OP Reports** and can be **run through Office Practicum**:

- Forms from the End-User tab in the Patient Medical Reports Manager window.
- Practice Forms, found under the Reports menu.
- Billing Statements.
- Most reports printed from the Patient Chart.
- General and Referral letters from the Correspondence Menu.
- Prescriptions.
- Diagnostic Test Requisitions.
- Reports printed from the Schedule.
- Patient ID reports from the Register.

Version 14.19

Office Practicum has two basic types of reports.

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