Standard Reports: Charges per Scheduled Appointment

Last Modified on 05/23/2019 11:20 am EDT

Version 14.19

When to Use this Report

Use this report to view a summary of appointments scheduled for a specified time frame on your practice's schedule.

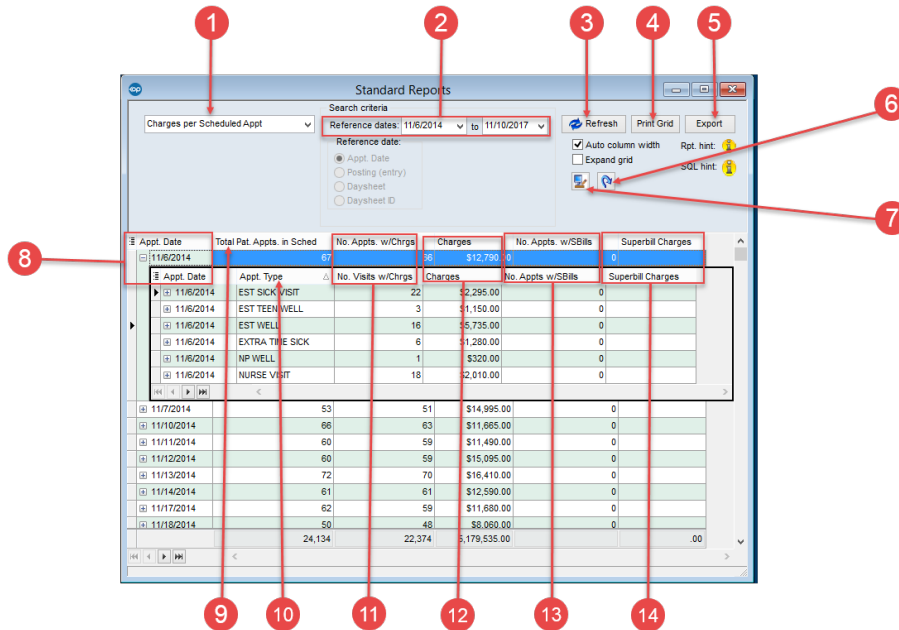## About Charges per Scheduled Appointment

> **Path: Reports menu > Standard Reports > Choose a Report dropdown > Choose per Scheduled Appointment**

This report compiles all the total charges for appointments on the schedule to three levels of detail:

1. All the appointments grouped by date.
2. The totals by type of appointment.
3. The appointment type totals for individual patients.

This report allows the user to review practice productivity by comparing charges billed to appointment types. It also serves as an unbilled charges report to help ensure that visits billed are appropriate for the scheduled visits.

> ⓘ **Note**: More columns are available in the data grid than shown in the map below. The map only describes the columns displayed in the map. To see the total list of columns, select the column selection icon in the upper-left area of the grid (▤).

Charges per Scheduled Appointment Map

Number	Section	Description
1	Choose a report	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** • **Financial Summary** • **Charges per scheduled appointment** • **Unbilled charges for scheduled appointments** • **Reimbursement per visit** • **Scheduled appointments** • **Compare allowable to payment**
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	Refresh button	The **Refresh** button refreshes the data in the standard reports grid.
4	Print Grid	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

	button	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).
5	Export button	The **Export** button exports the data shown in the standard reports grid as an .xls or .csv file.
6	Reset Preferences button	The **Reset Preferences** button resets the default window and grid preferences.
7	Preferences button	The **Preferences** button saves the window and grid preferences.
8	Appointment Date	The Appointment Date column groups all the appointments by date. Selecting the "+" icon next to the appointment date will expand the list of appointments for the specified date. The appointments are further grouped by appointment type.
9	Total Patient Appointments in Schedule	The Total Patient Appointments in Schedule column lists the total number of patient visits for an appointment date.
10	Appointment Type	When an appointment date is expanded, the appointments are further grouped by appointment type (established sick visit, established well visit, nurse visit, etc.).
11	Number of Appointments with Charges	The Number of Appointments with Charges column indicates the number of appointments where charges occurred. The top row of each group indicates the total number of appointments with charges for a specified date. After the group is expanded, the number of appointments with charges are grouped by appointment type. When expanded further, the list of specific appointments with charges are displayed.
12	Charges	The Charges column indicates the charges for the appointment date. The top row of each group indicates the total charges for the appointment date. After the group is expanded, the charges are grouped by appointment type. When expanded further, the list of specific charges are displayed.
	Number of Appointments	The Number of Appointments with Superbills column displays the number of appointments with superbills for the appointment date. The top row of each group indicates the number of appointments with

| 13 | with Superbills | superbills for the appointment date. After the group is expanded, the number of appointments with superbills are grouped by appointment type. When expanded further, the list of specific appointments with superbills are displayed. |
| 14 | Superbill Charges | The Superbill Charges column indicates the superbill charges that for the appointment dates. The top row of each group indicates the total superbill charges for the appointment date. After the group is expanded, the superbill charges charges are grouped by appointment type. When expanded further, the list of specific superbill charges are displayed. |

Version 14.10

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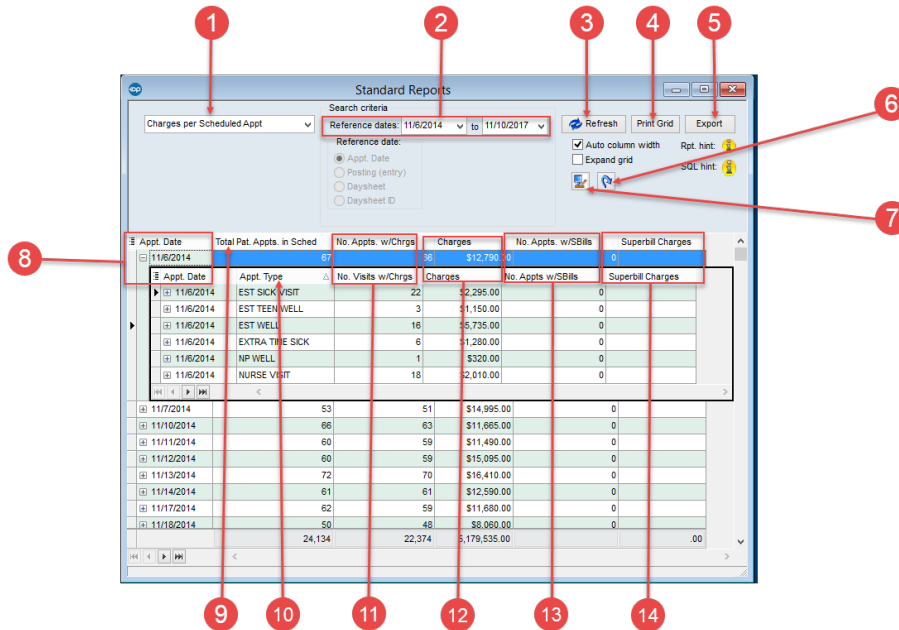## About Charges per Scheduled Appointment

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