Important Content Update Message
We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

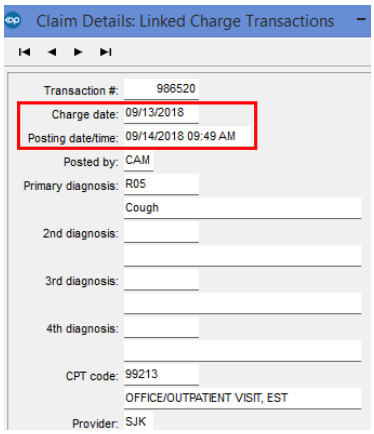
Report Reference Dates

Last Modified on 12/09/2019 8:55 am EST

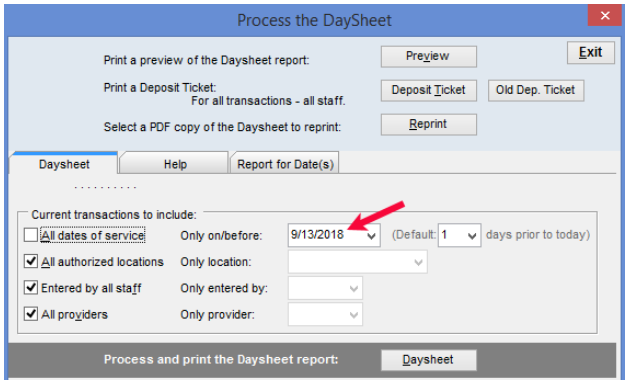
Version 14.19

Prior to running billing reports in OP, it is important to understand the different Reference Date options that are available to you. Using the correct Reference Date option will ensure that you are capturing the intended data in your reports. The following are Reference date options that you will see among the different Billing Reports available in the OP application.

- **Charge/Payment**: In regards to Charges, this is the date of service. In regards to Payments, this refers to the date that a payment came into OP. When posting payments, this typically defaults to the current date, but it can be manually changed to reflect the date a paper check was received. For ERAs, it is the day listed in the Pay Date column (which may differ from the ERA date if the ERA is made available prior to or before the check is actually dated).
- **Posting (entry)**: This date refers to the date that Charges or Payments were actually posted. In the example below, notice the difference between the Charge Date and the Posted Date.



- **Daysheet**: This date is the date for which a daysheet was processed (not necessarily the date when the **Daysheet** button was clicked). In the image below, the Daysheet Date is the date entered in the 'only on/before' field.



- **Patient Responsibility**: This date refers to the date that a patient was made responsible for a balance.

Version 14.10

Prior to running Billing Reports in OP, it is important to understand the different Reference Date options that are available to you. Using the correct Reference Date option will ensure that you are capturing the intended data in your reports. The following are Reference date options that you will see among the different Billing Reports available in the OP application.

- **Charge/Payment**: In regards to Charges, this is the date of service. In regards to Payments, this refers to the date that a payment came into OP. When posting payments, this typically defaults to the current date, but it can be manually changed to reflect the date a paper check was received. For ERAs, it is the day listed in the Pay Date column (which may differ from the ERA date if the ERA is made available prior to or before the check is actually dated).
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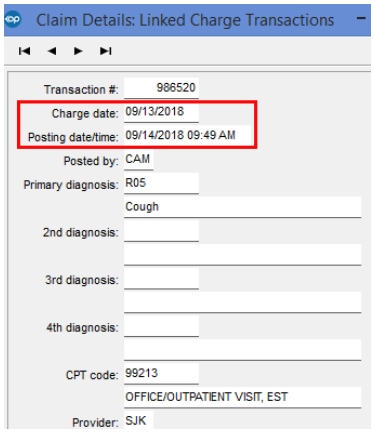
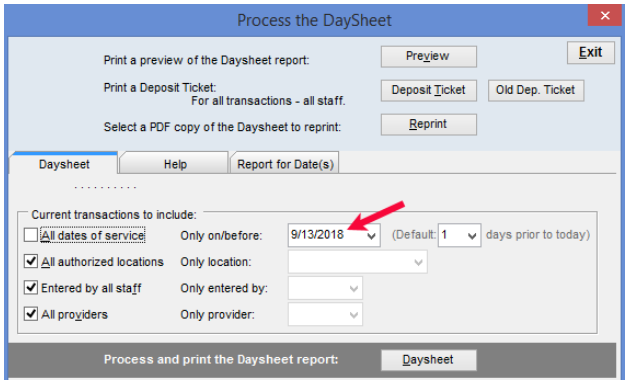


- **Daysheet**: This date is the date for which a daysheet was processed (not necessarily the date when the **Daysheet** button was clicked). In the image below, the Daysheet Date is the date entered in the 'only on/before' field.



- **Patient Responsibility**: This date refers to the date that a patient was made responsible for a balance.