

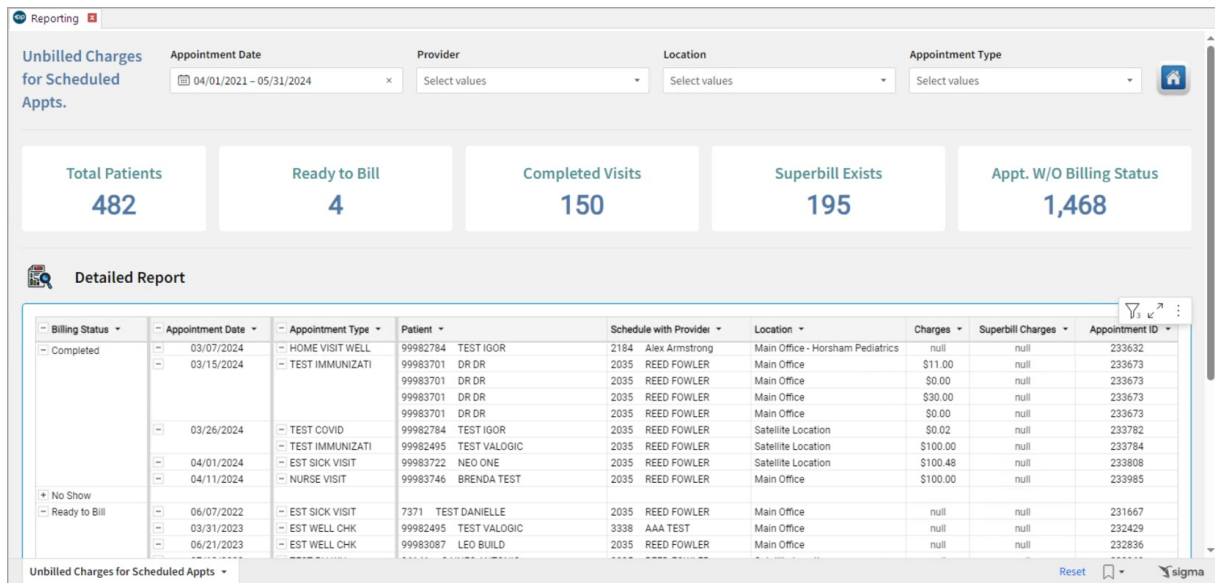
Scheduling Reports: Unbilled Charges for Scheduled Appointments

Last Modified on 05/23/2024 5:00 pm EDT

Version 21.3

When to Use this Report

Use this report daily or weekly to view scheduled appointments for patients that do not have an associated superbill or billed charges for appointments scheduled for the practice.



Billing Status	Appointment Date	Appointment Type	Patient	Schedule with Provider	Location	Charges	Superbill Charges	Appointment ID
Completed	03/07/2024	HOME VISIT WELL	99982784 TEST IGOR	2184 Alex Armstrong	Main Office - Horsham Pediatrics	null	null	233632
	03/15/2024	TEST IMMUNIZATI	99983701 DR DR	2035 REED FOWLER	Main Office	\$11.00	null	233673
		DR DR	99983701 DR DR	2035 REED FOWLER	Main Office	\$0.00	null	233673
		DR DR	99983701 DR DR	2035 REED FOWLER	Main Office	\$30.00	null	233673
		DR DR	99983701 DR DR	2035 REED FOWLER	Main Office	\$0.00	null	233673
	03/26/2024	TEST COVID	99982784 TEST IGOR	2035 REED FOWLER	Satellite Location	\$0.02	null	233782
		TEST IMMUNIZATI	99982495 TEST VALOGIC	2035 REED FOWLER	Satellite Location	\$100.00	null	233784
	04/01/2024	EST SICK VISIT	99983722 NEO ONE	2035 REED FOWLER	Satellite Location	\$100.48	null	233808
		NURSE VISIT	99983746 BRENDA TEST	2035 REED FOWLER	Main Office	\$100.00	null	233985
	Ready to Bill	06/07/2022	EST SICK VISIT	7371 TEST DANIELLE	2035 REED FOWLER	Main Office	null	null
03/31/2023		EST WELL CHK	99982495 TEST VALOGIC	3338 AAA TEST	Main Office	null	null	232429
06/21/2023		EST WELL CHK	99983087 LEO BUILD	2035 REED FOWLER	Main Office	null	null	232836

About Unbilled Charges for Scheduled Appointments

Path: Tools > Reporting > Scheduling Reports > Unbilled Charges for Scheduled Appointments

This report enables the user to select an appointment date and to compile all scheduled appointments for patients that do not have an associated superbill or charge transactions for the specified appointment date.

Scheduling Reports: Unbilled Charges for Scheduled Appointments Map

Hover over each of the Summary Tiles, to see specific data. For instructions on how to drill down and expand that information from the Summary Tiles, please see the **Drill Down** section of the [Data Element Tutorial](#).



Note: All columns in the Detailed Report section will show by default. To hide columns, see the [Visualization](#) section of the [Maximized Elements](#) article.

Filters and Summary Tiles

The screenshot shows a reporting interface with the following elements:

- 1:** Appointment Date filter (04/01/2021 - 05/31/2024)
- 2:** Provider filter (Select values)
- 3:** Location filter (Select values)
- 4:** Appointment Type filter (Select values)
- 5:** Total Patients tile (482)
- 6:** Ready to Bill tile (4)
- 7:** Completed Visits tile (150)
- 8:** Superbill Exists tile (195)
- 9:** Appt. W/O Billing Status tile (1,468)

Number	Section	Description
1	Appointment Date	Use this filter to select the date(s) you wish to search based on the date of the appointment. See the Dates section of the Filter Tutorial article for the different selections.
2	Provider	Use this filter to select a provider(s) associated appointments.
3	Location	Use this filter to select the Location(s) of the appointments.
4	Appointment Types	Use this filter to select the Appointment Types you wish to pull in this report.
5	Total Patients	The Total Patients tile shows the total number of patients pulled in this report based on the selected parameters. This is a distinct patient count pulled from the Patient column.
6	Ready to Bill	The Ready to Bill tile shows the total amount of patient visits pulled in this report that are ready to bill.
7	Completed Visits	The Completed Visits tile shows the total amount of visits in this report with a Visit Status of "Completed".
8	Superbill Exists	The Superbill Exists tile shows the total amount of appointments in this report with a Visit Status of "Superbill Exists".
9	Appt. W/O Billing Status	The Appt. W/O Billing Status tile shows the total amount of appointments in this report with a blank Billing Status.

Detailed Report

Billing Status	Appointment Date	Appointment Type	Patient	Schedule with Provider	Location	Charges	Superbill Charges	Appointment ID
Completed	03/07/2024	HOME VISIT WELL	99982784 TEST IGOR	2184 Alex Armstrong	Main Office - Horsham Pediatrics	null	null	233632
	03/15/2024	TEST IMMUNIZATI	99983701 DR DR	2035 REED FOWLER	Main Office	\$11.00	null	233673
			99983701 DR DR	2035 REED FOWLER	Main Office	\$0.00	null	233673
	03/26/2024	TEST COVID	99983701 DR DR	2035 REED FOWLER	Main Office	\$30.00	null	233673
			99983701 DR DR	2035 REED FOWLER	Main Office	\$0.00	null	233673
			99982784 TEST IGOR	2035 REED FOWLER	Satellite Location	\$0.02	null	233782
			99982495 TEST VALOGIC	2035 REED FOWLER	Satellite Location	\$100.00	null	233784
	04/01/2024	EST SICK VISIT	99983722 NEO ONE	2035 REED FOWLER	Satellite Location	\$100.48	null	233808
			99983746 BRENDA TEST	2035 REED FOWLER	Main Office	\$100.00	null	233985
	Ready to Bill	06/07/2022	EST SICK VISIT	7371 TEST DANIELLE	2035 REED FOWLER	Main Office	null	null
03/31/2023		EST WELL CHK	99982495 TEST VALOGIC	3338 AAA TEST	Main Office	null	null	232429
06/21/2023		EST WELL CHK	99983087 LEO BUILD	2035 REED FOWLER	Main Office	null	null	232836
07/12/2023		TEST BH WH	36141 GAINES ANTONIO	2035 REED FOWLER	Satellite Location	null	null	232868
			7484 PARKER SPIDEY	2035 REED FOWLER	Main Office	null	null	230349
04/14/2021		EST SICK VISIT	7517 LUCK HUEY	2035 REED FOWLER	Main Office	null	null	230350
			7517 LUCK HUEY	107 Demo Doctor, MD	Main Office	null	\$0.00	230426
			7484 PARKER SPIDEY	2035 REED FOWLER	Main Office	null	\$0.00	230473
			7484 PARKER SPIDEY	305 Demosthenes D. Wiggin	Main Office	null	\$0.00	230591
06/18/2021		EST SICK VISIT	7484 PARKER SPIDEY	305 Demosthenes D. Wiggin	Main Office	null	\$0.00	230591

Number	Section	Description
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a	Billing Status	The Billing Status column displays the Billing Status associated with the appointment, as seen on the Tracking Screen (Superbill Exists, etc). You can minimize the individual Billing Statuses to refine the search.
b	Appointment Date	The Appointment Date column lists the date of the appointments in groups. You can minimize the individual appointment dates to refine the search.
c	Appointment Type	The Appointment Type column lists the appointment type as set in OP.
d	Patient	The Patient column displays the full name of the patient associated with the appointment.
e	Schedule with Provider	The Schedule with Provider column lists the provider associated with the appointment.
f	Location	The Location column displays the location for the appointment. This is useful for practices that have multiple locations.
g	Charge	The Charge column displays the total charges from the provider for the selected transaction.
h	Superbill Charges	Charges that are generated by the CPT codes, vaccines and orders, that the providers generate when seeing the patient, that are not yet converted into a claim.
i	Appointment ID	The Appointment ID column lists the unique numerical ID of the appointment in OP.