PRACTICE MANAGER QUICK REFERENCE CARD FOR REPORTS

ADDING AND MODIFYING REPORT INFORMATION

Adding a Sort Criteria

- Click the **Sort Criteria** tab.
- Click the **Field Name** drop-down list and select the criteria you want to add.
- Configure the **Asc**, **Total**, **New Page**, and **Frame** options as needed.
- Click the **Add** button.
- Modify the position of the sort criteria by highlighting it and then using the up and down arrow keys to change its position, if needed.

Adding a Select Criteria

- Click the **Select Criteria** tab.
- Click the **Field Name** drop-down list and select the criteria you want to add.
- Click the **Operation** drop-down list and select the operation item.
- Configure the **Value** item(s) as needed. The selected Field Name and Operation will determine the type of Value options available.
- Click the **Add** button.

Modifying Sort Criteria

- Click the **Sort Criteria** tab.
- Highlight the criteria you would like to modify.
- Modify the **Field Name**, **Asc**, **Total**, **New Page**, and **Frame** options as needed.
- Click the **Update** button to activate the changes, click the **Clear** button to cancel, or click the **Remove** button to delete the criteria.
- Modify the position of the selected criteria using the up and down arrow keys, if needed.

Modifying Select Criteria

- Click the **Select Criteria** tab.
- Highlight the criteria you would like to modify.
- Modify the **Field Name**, **Operation**, and **Value** information as needed.
- Click the **Update** button to activate the changes, click the **Clear** button to cancel, or click the **Remove** button to delete the select criteria.

Creating & Modifying an Advanced Configuration

- Click the **Edit** button.
- Enter or modify the **Configuration Name**.
- Enter or modify the **Description**.
- Configure who is able to view the configuration you are creating or modifying.
- Click the **Save As New** button to create a new configuration, click the **Save** button to save modification made to an existing configuration, or click the **Delete** button to delete the selected configuration.

Adding a Report to a Batch

- Select the report you want to add to a batch.
- Click the **Add to Batch** button.
- Select the **Batch Name** you want to add this report to, and then click the **OK** button.
- Click the **New** button to create a new report batch.
- Enter a **Batch Name**.
- Enter a **Description** for the batch.
- Click the **OK** button.

BILLING REPORTS

Charges Not Yet Billed

- Click the **Reports** tab.
- Click the **Financial** tab.
- Click on the **+** sign next to **Charges Not Yet Billed** report.
- Click the **Summary** report type.
- Click the **Advanced Configurations** drop-down list.
- Select either the **Insurance Charges** or **Patient Charges** configuration.
- Modify the sort and/or select criteria as needed.
- Click the **Preview** or **Print** button.

Aged Insurance Receivables

- Click the **Reports** tab.
- Click the **Financial** tab.
- Click on the **+** sign next to **Account Receivables** report.
- Click the **Aged Insurance Receivable** report type.
- Click the **Advanced Configurations** drop-down list.
- Select the **Practice by Insurance** configuration.
- Modify the sort and/or select criteria as needed.
- Modify the Other Criteria as needed.
- Click the **Preview** or **Print** button.

Aged Patient Receivables

- Click the **Reports** tab.
- Click the **Financial** tab.
- Click on the **+** sign next to **Account Receivables** report.
- Click the **Aged Patient Receivable** report type.
- Click the **Advanced Configurations** drop-down list.
- Select the **Patient, All Charges** configuration.
- Modify the sort and/or select criteria as needed.
- Modify the Other Criteria as needed.
- Click the **Preview** or **Print** button.

PRACTICE MANAGER QUICK REFERENCE CARD FOR REPORTS

MISCELLANEOUS REPORTS

Collection Transfers Report

- Click the **Reports** tab.
- Click the **Lists** tab.
- Click on the **+** sign next to the **Charge** report.
- Click the **Collection Transfers** report type.
- Modify the sort and/or select criteria as needed.
- Click the **Preview** or **Print** button.

Credit Balances Report

- Click the **Reports** tab.
- Click the **Financial** tab.
- Click on the **+** sign next to **Credit Balances** report.
- Click the **Summary** report type.
- Click the **Advanced Configurations** drop-down list.
- Select the **Practice by B Provider by Patient** or the **Practice by Patient Name** configuration.
- Modify the sort and/or select criteria as needed.
- Click the **Preview** or **Print** button.

Patient Recall List Report

- Click the **Reports** tab.
- Click the **Lists** tab.
- Click on the **+** sign next to the **Patient Recalls** report.
- Click the **Long Listing 1** report type.
- Modify the sort and/or select criteria as needed.
- Click the **Preview** or **Print** button.

MONTH END REPORT RECOMMENDATIONS

Account Receivables Summary

- Click the **Reports** tab.
- Click the **Financial** tab.
- Click on the **+** sign next to **Account Receivables** report.
- Click the **Summary by Type** report type.
- Click the **Advanced Configurations** drop-down list.
- Select the **By Billing Provider**, **By Facility**, **By Practice**, **By Provider**, or **By Referral** report configuration.
- Modify the sort and/or select criteria as needed.
- Click the **Preview** or **Print** button.

Payment Analysis

- Click the **Reports** tab.
- Click the **Financial** tab.
- Click on the **+** sign next to **Payment Analysis** report.
- Click the **By Insurance Company** report type.
- Click the **Advanced Configurations** drop-down list.
- Select the **Previous Month End By Practice** configuration.
- Click the **Preview** or **Print** button.

Payment Type Analysis

- Click the **Reports** tab.
- Click the **Financial** tab.
- Click on the **+** sign next to **Payment Type Analysis** report.
- Click the **Detail** report type.
- Click the **Advanced Configurations** drop-down list.
- Select the **Previous Month End By Practice** configuration.
- Click the **Preview** or **Print** button.

Procedure Analysis

- Click the **Reports** tab.
- Click the **Financial** tab.
- Click on the **+** sign next to **Procedure Analysis** report.
- Click the **Detail** report type.
- Click the **Advanced Configurations** drop-down list.
- Select the **Previous Month End By Practice** configuration.
- Click the **Preview** or **Print** button.

System Analysis

- Click the **Reports** tab.
- Click the **Financial** tab.
- Click on the **+** sign next to **System Analysis** report.
- Click the **Monthly** report type.
- Click the **Advanced Configurations** drop-down list.
- Select the **Previous Month End Billing Provider Analysis, Previous Month End Facility Analysis, Previous Month End Practice Analysis, Previous Month End Provider Analysis,** or **Previous Month End Referring Physician Analysis** configuration.
- Click the **Preview** or **Print** button.

Write Off Analysis

- Click the **Reports** tab.
- Click the **Financial** tab.
- Click on the **+** sign next to **Write-Off Analysis** report.
- Click the **Detail** report type.
- Click the **Advanced Configurations** drop-down list.
- Select the **Previous Month End By Practice** configuration.
- Click the **Preview** or **Print** button.