



End of Month Manager Reporting

- 1.) **Provider Summary:** Visual breakdown for providers on how many patients they saw, visits for the months, how much in new charges they brought in, and payments received per month by provider.

To Run:

Reports -> Periodic Reports -> Provider Summary

- Select date range
- How to organize data
- How to list by provider
 - Recommend rendering
- <ok>
- <print> or <view> depending on need of practice

- 2.) **Production Report:** Summary of what procedures were billed and total income generated by procedure. Useful for inventory purposes or if you want to see trends in procedures within practice.

To Run:

Reports ->Periodic Reports -> Production Report

- Choose desired date range
- Pick providers you want to see or all providers for whole practice
- <ok>
- <print> or <view> depending on need of practice

3.) **Practice Summary Report:** Financial “snap shot” of entire practice.

To Run:

Reports ->Billing Reports ->Practice Summary Report

- Pick providers you want to see or all providers for whole practice
- <ok>
- <print> or <view> depending on need of practice

4.) **Transaction Summary Report:** Will give you a count and dollar amount for each transaction type (i.e. Deductable) for a specified date range. It can also be modified to run by specific provider as well. Shows you a breakdown of how provider/practice money is flowing into practice.

To Run:

Reports ->Periodic Reports -> Transaction Summary Report

- Choose Date Range
- Choose Method (recommend Posting Date)
- Pick providers you want to see or all providers for whole practice
- Pick one location with drop down, or choose all facilities
- Choose product category for specific charges or all transactions for whole practice
- Recommend keeping procedure set to “All Sets”
- Recommend leave radio button set to “Code”
- <ok>
- <print> or <view> depending on need of practice

5.) **Trial Close:** Month End balance sheet for accounting purposes.

To Run:

Reports -> Other Reports -> Trial Balance Report

- Choose end of month date to complete close
- <ok>
- <print> or <view> depending on need of practice