

1 - Patient Address List

- Purpose:** Prints a patient list with a complete address and telephone numbers.
- Sort:** The default is by last name or the user can modify/change the sort field(s).
- Selection:** Using the extended selection screen the user defines the record selection criteria.
- Paper:** Sent to default printer, 80 column report with no special print control.
- Procedure:** At the Reports Main Menu press **[2]** for the "Patient Reports Menu" then press **[1]** for Patient Address List. A sort screen will be displayed, modify the sort as needed and then press **[ESC]**. The next screen displayed will be the extended selection screen which is used to select the records to be printed. Press **[ENTER]** to select all, or supply the required selection criteria.

Change Printer Selection? (Y/N) >

Press **[Y]** to change the printer destination. Then a prompt to select the provider is displayed.

For more information about sorting and the extended selection screen see chapter 13.

See Appendix C for a sample printout.

Patient Reports Menu

3 or 4 - Patient Account Summary

Purpose: Prints an abbreviated aged Accounts Receivable and demographic report with a balance for insurance and patient. Totals for the group selected are also printed. The option 4 will print on wide paper - offering more information.

Sort: The default is by account number, or the user can modify/change the sort field(s).

Selection: Using the extended selection screen the user defines the record selection criteria.

Paper: Sent to default printer, 90 column report has special printer code 12 to set 12 pitch that should fit this report on 8.5" paper. If your printer is not capable of printing at this pitch, you will require 15" paper to print this report. Select option 4 for the wider report option.

Procedure: At the Reports Main Menu press **[2]** for the "Patient Reports Menu" then press **[3]** for Patient Account Summary. A sort screen will be displayed, modify the sort as needed and then press **[ESC]**. The next screen displayed will be the extended selection screen which is used to select the records to be printed. Enter your selection, then press **[ENTER]** to generate the report. For more information about sorting and the extended selection screen see chapter 13.

```
Change Printer Selection? (Y/N) >
```

Press **[Y]** to change the printer destination. Then a prompt to select the provider is displayed.

See Appendix C for a sample printout.

5 - Patients' Employer Listing

- Purpose:** Prints a list of the patients' employers.
- Sort:** The default is alphabetic by company name or the user can modify/change the sort field(s).
- Selection:** The report selects all the patients' employers.
- Paper:** Sent to default printer, 82 column report with no special printer codes. This report should fit on 8.5" paper with most printers.

Procedure: At the Reports Main Menu press **[2]** for the "Patient Reports Menu" then press **[5]** for Patients' Employer Listing. A sort screen will be displayed, modify the sort as needed and then press **[ESC]** to execute. For more information about sorting and selecting see chapter 12.

```
Change Printer Selection? (Y/N) >
```

Press **[Y]** to change the printer destination. Then a prompt to select the provider is displayed.

See Appendix C for a sample printout.

Patient Reports Menu

6 - Other Responsible Parties

- Purpose:** A list of responsible parties and their codes. (Note: This report does not contain patients.)
- Sort:** The default is numeric by account code or the user can modify/change the sort field(s).
- Selection:** The report selects all the responsible parties.
- Paper:** This report is sent to the default printer. It is an 80-column report with special printer code 11 to select 10 pitch.
- Procedure:** At the Reports Main Menu press **[2]** for the "Patient Reports Menu" then press **[6]** for Other Responsible Parties. A sort screen will be displayed, modify the sort as needed and then press **[ESC]** to execute. For more information about sorting see chapter 12.

```
Change Printer Selection? (Y/N) >
```

Press **[Y]** to change the printer destination. Then a prompt to select the provider is displayed.

See Appendix C for a sample printout.

8 - Recall Patient Report

- Purpose:** A list of patients marked for recall in a given month and year.
- Sort:** The report is sorted by patient last names then by first names.
- Selection:** The user enters the month and year to be selected.
- Paper:** Sent to the default printer. The report is 80 column report will fit on 8.5" paper.
- Procedure:** At the Reports Main Menu press for the "Patient Reports Menu" then press for Recall Patient Report.

```
Change Printer Selection? (Y/N) >
```

Press to change the printer destination. Then a prompt to select the provider is displayed.

The following prompt will be displayed:

```
Input RECALL DATE (MM/YYYY) >
```

If no patients are listed for recall in the month given the message "No Patients Set for Recall During: MM/YYYY" is displayed and the menu appears.

See Appendix C for a sample printout.

Patient Reports Menu

0 - Missed Recall Report

Purpose: Prints mailing labels for recall patients marked for a given month and year. Increments count of missed recalls. This will give you a reminder of the number of times a patient has been listed on this report for missing a notice of a recall. Use this as a followup list to insure that important recall notices have been brought to the attention of the patient and all prudent effort has been made to get the patient to respond.

Sort: The report is sorted by Number of Missed Recalls, and by patient account. The recalls with the most missed recall count will list first.

Selection: The user enters the month and year to be selected. All recalls in or before the month given that have at least one contact attempt marked will be selected.

Paper: Sent to default printer. Set for 40 column labels (4 inches wide) by 1 inch long with one across.

Procedure: At the Reports Main Menu press **[2]** for the "Patient Reports Menu" then press **[9]** for Recall Patient Labels.

```
Change Printer Selection? (Y/N) >
```

Press **[Y]** to change the printer destination. Then a prompt to select the provider is displayed.

The following prompt will be displayed:

```
Input RECALL DATE (MM/YYYY) >
```

Then you will be able to select how long since the last contact. A prompt appears:

```
Days since last Contact Attempt:
```

The default is 7 days. Any recall that is from a month prior to the month indicated and has not had a contact in the number of days indicated will be selected. This report will add one to the missed contact count if the last contact date is older than today.

See Appendix C for a sample printout.

Q - Pre-Coded Text - Medical Notes

- Purpose:** Prints Pre-Coded Text file to allow editing and reference information to be created.
- Sort:** The report is sorted by Pre-Coded text name.
- Selection:** The user selects Medical Note Text or Data Fields Available for Merging.
- Paper:** Sent to default printer. Set for 40 column labels (4 inches wide) by 1 inch long with one across.
- Procedure:** At the Reports Main Menu press **[2]** for the "Patient Reports Menu" then press **[Q]** for Pre-Coded Text - Medical Notes.

```
Change Printer Selection? (Y/N) >
```

Press **[Y]** to change the printer destination. Then a prompt to select the provider is displayed.

The following prompt will be displayed:

```
Medical Note Text
Data Fields Available
```

Highlight the type of data that should be printed.

Data fields are coded with different leading characters to identify the type of file that can make use of this data.

* Patient Letters data fields to load data in position indicated.

@ Letter Note for merging text

{ Medical Notes data fields to load data in position indicated.

Items with these characters are programmed to work correctly, do not try to add your own. Only items without these codes are modified or added by the user. A list can be printed from this report for reference.

See Appendix C for a sample printout.

Patient Reports Menu

9 - Inactive Patient List

Purpose: Prints a list of patients that have been marked as inactive, by provider. The report includes patient name, patient balance, insurance balance, and carrier codes.

Sort: The report is sorted by Default Provider ID, then by patient name.

Selection: The report selects all the patients that have a Date Last Seen date less than the given date.

Paper: Sent to default printer. This function prints an 80-column report on 8.5" paper with no special printer controls.

Procedure: At the Reports Main Menu press **[2]** for the "Patient Reports Menu" then press **[B]** for Patients by Referring M.D. Report.

Change Printer Selection? (Y/N) >

Press **[Y]** to change the printer destination.

Enter LAST SEEN Date (mm/dd/yy) (ENTER for Earliest)

Enter the cut off date and press **[ENTER]**. The report gives a total after each provider and a count of inactive patients. This might be useful to do some marketing to encourage patients to continue treatment.

B - Patients by Referring M.D.

- Purpose:** Prints a report by referring physician, listing patients referred and revenue generated.
- Sort:** The report is sorted by referring ID, then by patient name. A new page will start for each different referring physician ID.
- Selection:** The report selects all the patients that have a referring physician listed on their patient demographics screen. The user can select one referring physician code or all.
- Paper:** Sent to default printer. This function prints an 80-column report on 8.5" paper with no special printer controls.
- Procedure:** At the Reports Main Menu press **[2]** for the "Patient Reports Menu" then press **[B]** for Patients by Referring M.D. Report.

```
Change Printer Selection? (Y/N) >
```

Press **[Y]** to change the printer destination.

Then a prompt will allow one referring physician to be specified.

```
Referring Physician Code: (ENTER for ALL) >
```

Press **[ENTER]** to print all patients that have a referring physician code. To select all patients that have one particular code enter that code at this time.

See Appendix C for a sample printout.

Patient Reports Menu

C - Patient Birthday Report

- Purpose:** Prints a list of patients with a birthday in a specified month or a list of all patients.
- Sort:** The report is sorted the physician code then by the patients' month and day of birth.
- Selection:** The report selects all the patients with a given birth month, or all patients if no month is given.
- Paper:** Sent to default printer. This function prints an 80-column report with special printer code 11 to set 10 pitch.
- Procedure:** At the Reports Main Menu press for the "Patient Reports Menu" then press for Patient Birthday Report. The following prompt will be displayed:

```
Change Printer Selection? (Y/N) >
```

Press to change the printer destination. Then the prompt will appear to allow you to select a month.

```
Type month desired or  for ALL patients >
```

Enter 1 for January, 2 for February, etc. to pick a month.

See Appendix C for a sample printout.

D - Patient Demographics Form

Purpose: Prints a patient demographic form the same as the one that can be printed from Daily Input.

Sort: The default is by account code or the user can modify/change the sort field(s).

Selection: Using the extended selection screen the user defines the record selection criteria. Press to select all patients.

Paper: Sent to default printer, 80 column / 66 line form with no special print control.

Procedure: At the Reports Main Menu press for the "Patient Reports Menu" then press for Patient Demographics Forms. A sort screen will be displayed, modify the sort as needed and then press . The next screen displayed will be the extended selection screen used to select the records to be printed. For more information about sorting and the extended selection screen, see Chapter 13.

Press to change the printer destination.

See Appendix C for a sample printout.

Patient Reports Menu

E - Patient's by Employer Report

Purpose: Prints a list of patients sorted by the employer code.

Sort: The report is sorted by employer name and then by patient last name, first name.

Selection: The report can be printed for all employers or one employer can be selected.

Paper: Sent to default printer, 80 column / 66 line form with no special print control.

Procedure: At the Reports Main Menu press **[2]** for the "Patient Reports Menu" then press **[D]** for Patient Demographics Forms. A sort screen will be displayed, modify the sort as needed and then press **[ESC]**. The next screen displayed will be the extended selection screen used to select the records to be printed. For more information about sorting and the extended selection screen, see Chapter 13.

```
Change Printer Selection? (Y/N) >
```

Press **[Y]** to change the printer destination.

Then a prompt will display the employers similar to the following:

```
All Employers
ABC Company
Pittsburgh Plate Glass
Westinghouse Beatice
```

Up to 200 employers could be listed. Highlight the selection you would like and press **[ENTER]**. Then your report will be generated.

See Appendix C for a sample printout.

F - Count of Patients by Carrier

Purpose: This will print a list of your patients by primary carrier. Each patient is listed, their sex, birth date and SS number. This can be used to reconcile with any HMO or managed care systems that might offer you as a PCP.

Sort: The report is sorted by doctor code, carrier code and then by patient last name & first name.

Selection: This selects all patients or only patients with the carrier code indicated.

Paper: Sent to default printer, 80 column / 66 line form with no special print control.

Procedure: At the Reports Main Menu press for the "Patient Reports Menu" then press for Count of Patients by Carrier.

Change Printer Selection? (Y/N) >

Press to change the printer destination. Then a prompt to select the carrier will appear.

Enter Carrier Code or (ENTER for ALL) >

Enter the carrier code that should be selected or press to print all carriers.

Only select Active Patients (Y/N) >

Press to select patients with a status of A - Active. All other status settings will be omitted from this report. Press to include active, inactive, deceased, terminated and completed status patients.

See Appendix C for a sample printout.

Patient Reports Menu

G - NON MD Referral Source Report

Purpose: This will print a list of your patients that had a NON MD Referral Source. This data field can allow you to enter the method your patient used to locate your practice, such as referral service, phonebook, friend, etc. The report will help you analyze the best way to advertise your business to future customers by seeing how your patients found your practice.

Sort: The report is sorted by source code, then by patient last name & first name.

Selection: This selects all patients that have a non-blank NON-MD Referral Source field.

Paper: Sent to default printer, 80 column / 66 line form with no special print control.

Procedure: At the Reports Main Menu press for the "Patient Reports Menu" then press for NON MD Referral Source Report.

Press to change the printer destination.

See Appendix C for a sample printout.

Patient Reports Menu

H - New Patient Graph

Purpose: This report will give a graphic representation of the new patients by provider for a given range of months. A date range allows this to be selected with a particular time period.

Sort: The report is sorted by doctor code, and month.

Selection: This selects all patients that have a "Patient Since" date between the dates given.

Paper: Sent to default printer, 80 column / 66 line form with no special print control.

Procedure: At the Reports Main Menu press **[2]** for the "Patient Reports Menu" then press **[H]** for New Patient Graphs.

```
Change Printer Selection? (Y/N) >
```

Press **[Y]** to change the printer destination. Then a prompt to select the provider will appear.

```
1 - Vicki G Henry M.D.  
11 - Dennis Spanish M.D.  
All DOCTORS
```

Highlight your selection and press **[ENTER]**.

```
ENTER FROM DATE (MM/DD/YY) ([ENTER] for Earliest) >
```

Enter the beginning date to begin the selection. Press **[ENTER]** to use a starting date 10 years before today's date. Then a prompt will request the closing date.

```
ENTER TO DATE ([ENTER] for Today's Date) >
```

Enter the closing date to be selected or press **[ENTER]** for today's date. Then a box indicating the selections given is displayed.

```
SELECTING NEW PATIENTS FROM 01/01/83 to 01/26/98  
Correct [D]ates, [C]ontinue, [X]-Exit.
```

Press **[X]** to cancel the report. Press **[D]** to change the dates selected or press **[C]** or **[ENTER]** to continue.

See Appendix C for a sample printout.

Patient Reports Menu

I - New Patient List

Purpose: This report will provide a list of new patients that came to your practice in a given time period.

Sort: The report is sorted by doctor code, and by Patient Since Date.

Selection: This selects all patients that have a "Patient Since" date between the dates given.

Paper: Sent to default printer, 80 column / 66 line form with no special print control.

Procedure: At the Reports Main Menu press for the "Patient Reports Menu" then press for New Patient List.

```
Change Printer Selection? (Y/N) >
```

Press to change the printer destination. Then a prompt to select the provider will appear.

```
1 - Vicki G Henry M.D.  
11 - Dennis Spanish M.D.  
All DOCTORS
```

Highlight your selection and press .

```
ENTER FROM DATE (MM/DD/YY) ( for Earliest) >
```

Enter the beginning date to begin the selection. Press to use a starting date 10 years before today's date. Then a prompt will request the closing date.

```
ENTER TO DATE ( for Today's Date) >
```

Enter the closing date to be selected or press for today's date. Then a box indicating the selections given is displayed.

```
SELECTING NEW PATIENTS FROM 01/01/83 to 01/26/98  
Correct  ates,  ontinue,  -Exit.
```

Press to cancel the report. Press to change the dates selected or press or to continue.

See Appendix C for a sample printout.

Patient Reports Menu

J - Count of Patients By Zip

Purpose: This report will count the number of patients by 5 digit and 3 digit zip codes. The report can be useful in analyzing your advertising market or determining if bulk mailing is a viable option for your practice. This is only analyzing the zip codes for your patients. If your mailings are sent to responsible parties or insurance companies, this might not be the best list for bulk mailing. A zip report is also listed on the statement menu which will look at the disbursement of your statements by zip.

Sort: The report is sorted by zip code. A total count of patients by 5 digit and then 3 digit zip sorts are given.

Selection: This selects all patients.

Paper: Sent to default printer, 80 column / 66 line form with no special print control.

Procedure: At the Reports Main Menu press **[2]** for the "Patient Reports Menu" then press **[J]** for Count of Patients by Zip.

```
Change Printer Selection? (Y/N) >
```

Press **[Y]** to change the printer destination.

See Appendix C for a sample printout.

Patient Reports Menu

K - Family List

Purpose: This report will list all patients grouped by "Statement bill to". The report prints the carrier and responsible party information for each family member.

Sort: The report is sorted by statement code, then by birth date. The parents will list first then any children will list oldest to youngest.

Selection: This selects all patients or one family group can be selected.

Paper: Sent to default printer, 80 column / 66 line form with no special print control.

Procedure: At the Reports Main Menu press **[2]** for the "Patient Reports Menu" then press **[K]** for Family List..

```
Change Printer Selection? (Y/N) >
```

Press **[Y]** to change the printer destination. Then a prompt to select the provider will appear.

```
Statement TO (Bill TO) Code
Patient's Account
Cancel Report
```

Highlight your selection and press **[ENTER]**.

Statement TO Code

This option will allow you to enter the code used in the "Send Statement TO" selection. A number or a "P" then a number would indicate a Patient Account. An "R" and a number would indicate a Responsible Party. Either can be entered to select the correct family. If you do not know the correct "Send Statement To" for the patient use the following option.

Patient's Account

Enter the patient account code to select all patients in the same family. The Send Statement for this patient is pulled and used to select the family. This will allow a quick way to simply reference the patient without referencing the code used as a family reference on the patient.

See Appendix C for a sample printout.

L - Patient Tests List

- Purpose:** This report will list all patient tests. .
- Sort:** The report is sorted by test name then patient account code.
- Selection:** This selects one patient or all, then all pending tests or all tests/completed tests, over a given time span.
- Paper:** Sent to default printer, 120 column / 66 line form with printer code at 13 for 16.7 pitch. This font size will allow the report to fit on 8 ½ x 11" paper.
- Procedure:** At the Reports Main Menu press **[2]** for the "Patient Reports Menu" then press **[K]** for Family List..

```
Change Printer Selection? (Y/N) >
```

Press **[Y]** to change the printer destination. Then a prompt to select the provider will appear.

```
Select ONE Patient: (Blank for ALL)
```

Enter the patient account number or press **[ENTER]** to select all patient's tests.

```
Pending Tests (First result is blank)
All Tests
Completed Tests (First Result is not blank)
Exit
```

This list of options is displayed, highlight your choice and press **[ENTER]** .

If All tests or Completed Tests, were selected a date range is requested.