

## 1 - Patient Demographics

**Purpose:** Writes Patient Demographics to a file that can be imported to various other software.

**Sort:** The report is sorted by patient name.

**Selection:** Lets you select using the Extended Selection options. See Chapter 13 for more details on using this option.

**Procedure:** At the Reports Main Menu press **[9]** for the "Export Menu" then press **[1]** for Patient Demographics.

Enter the selection data or press **[ENTER]** for all patients.

Next supply the appropriate security information to access the report.

Change Printer Selection? (Y/N) >

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

PfExportFolder - can be defined in the Configuration Editor to indicate where this file will be written. The name should include a final "/". If this is not assigned, then a default folder will be used. This folder is identified by the following variables: PFDATA{PFDIR{"fpmerge/"

Export File to what filename: (.csv format is created)

Enter the filename. It is not necessary to include the .csv, it will be added automatically. The name should not include spaces or other characters that are not valid for filenames on the operating system in use.

Sample with Headings and one patient.

```
"Last Name","First Name Initial","Sex","Account Number","Provider Name","Social
Number","Pat Address","Pat Addr2","Pat City","Pat State","Pat Zip","Patient Balance","Total
Due","DOB","","Last Date of Service","Employer Address","Employer City","Employer
Phone","Employer Name","Employer State","Employer Zip","","Resp Last Name, First
Name","Resp Address","Resp Phone","Resp City","Resp State","","Resp Zip","Primary
Carrier","Secondary Carrier","Tertiary Carrier"
"Adells","Helena M","F","1","Vicki Henry M.D.,""555-38-5467","558 Senate
Drive","","Pittsburgh","PA","15236","185.05","2983.42","10/04/1912","","03/26/2008","102 West
Street","Pittsburgh","","Westinghouse Beatice","PA","15222","","Adells, Helena M","558 Senate
Drive","4128359415","Pittsburgh","PA","","15236","Medicare","BLUE SHIELD Of
Kentucky","Retired People Insurance"
```

See Appendix C for sample printouts.

**8 - Collection Report / Export**

- Purpose:** Send Collection information to a file so it can be sent to a collection agency.
- Sort:** By Account and invoice number. Sort is handled the same as used when printing batch claim forms.
- Selection:** All invoices in collection.
- Paper:** Standard paper as defined in the letter setup.
- Procedure:** At the Reports Main Menu press **[8]** for the "Patient Correspondence Menu" then press **[3]** for Recall Patient Letters.

Change Printer Selection? (Y/N) >

Press **[Y]** to change the printer destination. The following prompt will be displayed:

SINCE DATE: (MM/DD/YY) (Blank for ALL) >

Since information is sent to collection once a month, it would be the date since the file was last generated to collect all new items. Leave blank to select all collection items.

Then select the layout to be used for this export file. The data is listed using the same setup as the printed insurance claims. Any data that is available to print on an insurance claim can be included in an export for collection. (These are setup the same as Define Insurance Forms.)

EXPINV - (==) Export Invoice Data  
EXPORT - (==) export financial data to collection service.

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

All the same selection options that are available when printing insurance forms in batch are displayed. If you have any questions, refer to Chapter 9.

PfExportFolder - can be defined in the Configuration Editor to indicate where this file will be written. The name should include a final "/".

If PfExportFolder is not blank, the file will be written in the specified folder. If it is not assigned a location, the file will be found in the folder called: PFDIR{PFDATA{"fpmerge/"

Examples:

PfExportFolder = /appl/reports/  
set PfExportFolder=C:\tmp\reports

A paper report is also generated to give a record of the data included in the file.

See Appendix C for a sample printout.

## Export Menu

### 9 - Invoice Data

- Purpose:** Write Invoice Data to an export file. This can be helpful to put data in a spreadsheet.
- Sort:** Same as used by Batch printing Insurance Claims.
- Selection:** The invoice data can be selected using the Extended Selection option. The carrier may be specified or all invoices are selected.
- Paper:** Standard 8 ½" by 11" paper, with 12 pitch printing.
- Procedure:** At the Reports Main Menu press **[9]** for the "Export Menu" then press **[9]** for Export Invoice Data. The following prompts will be displayed:

First the extended selection screen, to allow a selection on any data offered in the invoice information. Then supply the security information.

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

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

Then select the layout to be used for this export file. The data is listed using the same setup as the printed insurance claims. Any data that is available to print on an insurance claim can be included in an export for collection. (These are setup the same as Define Insurance Forms.)

```
EXPINV - (==) Export Invoice Data
EXPORT - (==) export financial data to collection service.
```

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

```
Enter INSURANCE COMPANY CODE or PRESS ENTER for ALL >
```

A paper list is generated so you will have a copy of what is selected.

**Notes:**