

Front Office Folder - Portal Reports

REPORT NAME	FUNCTION	RECOMMENDED FREQUENCY
Location Open Days	Provides a listing of Open Days by Company and location	Daily
Clinic Daily Schedule	Provides an excel version of the location daily schedule. Meant to be used as part of the downtime procedure in case of an internet outage or system downtime	PRN
Cancellation/No Show Detail	Provides information on for cancelations/no shows by location & by clinician. Additionally, provides details on case info, case id, patient name, appt date	Daily
Patient Visit Outlook	Current "Active" patients and all of their scheduled appts (filters available to pull all appts & only future appts)	Weekly (Monday)
Case Appointment Inactivity	Looks across all Active cases for a company and lists any cases that do not have any future appointments scheduled	Weekly (Tuesday)
Patient Visit Utilization	Provides a listing of patients by location for the specified date range. Additional details are supplied on the patients such as primary insurance plan, referring dx, authorized visits & total visit count for the patient.	Weekly
Encounters on Hold	Displays patient cases with charges on hold by location, case number, service date, clinician, insurance plan and balance. This is helpful for when a therapist becomes credentialed with an insurance and now the claims may be released from hold	Weekly
Visits without Charges	Provides a list of patient cases with appointments without charges entered. This allows users to monitor appointments that have been arrived and have not had charges entered	Daily
Daily Cash Drawer Transaction	Shows all Over the Counter (OTC) payments taken by date and by payment type. This report also includes check/authorization name and the user that posted the payment. May be ran by multiple clinic locations	Daily
Schedule Outlook	Daily – provides the scheduled visit count for the week as it was each morning of the day that week. Totals reported each day and calculates the percentage of schedule appts in comparison to this week in the second (next) week and third week following the current week	Daily
Copay Collection Report	Shows the Copay Collection status for all appointments by location	Weekly
Case Coverage Expiration	Looks at insurance coverages for an episode of care and alerts of any cases where insurance coverage has ended	Monthly
Case Referral Expiration	Displays any cases where the referral expiration date is coming up or expired and provides information about the patient such as most recent visits, next schedule appointment and a count of visits kept by patient	Weekly

Patient Email Collection %	Displays a total email collection %, breaking down into categories of % of Patient's Refused & Patient's who do not have an email. Page 2 of the report lists by Case those patient's we have not collected an email from	Weekly
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