Most OpenEMR reports can be

- **Submitted to the screen**
- **Exported to comma separated value (CSV)**
- **Printed to paper**

Submit   Export to CSV   Print

Sales

Reports
Financial
Sales

Report – Sales – End of day report - Onscreen

Report: List of all services and products sold during a specific date (e.g. today).

Uses: End-of-day control, allows to verify cash and credit receipts.

Select: Reports > Financial > Sales, Details, and enter today's date BOTH in the From and To fields. Press Submit button.

Category: Service/Product group
Item: User-defined services & products
Date: Transaction date
Invoice: invoice number

(Qty): Quantity
Price: User-defined Price Level
(Adj): Adjustment
(GST): Goods & Services Tax
Payment:

Category	Item	Date	Invoice	Qty	Price	Adj	GST	Payment
Contraception	CON-029 Depo (3 month) - Follow up - Resupply	29/07/2017	000700	1	40.00	10.00		30.00
	Total for CON-029 Depo (3 month) - Follow up - Resupply			1	40.00	10.00		30.00
	CON-040 Implants (2 Rods) - Initial Consult	29/07/2017	000704	1	15.00	5.00		1.49
	Total for CON-040 Implants (2 Rods) - Initial Consult			1	15.00	5.00		1.49
	Total for category Contraception			2	55.00	15.00		
SRH - Gynecology	GYN-035 GYN - VIA Screening	29/07/2017	000701	1	30.00	15.00		
	Total for GYN-035 GYN - VIA Screening			1	30.00	15.00		
	GYN-037 GYN - Pap Test (sampling)	29/07/2017	000701	1	20.00			
	Total for GYN-037 GYN - Pap Test (sampling)			1	20.00			
	GYN-080 Mammography	29/07/2017	000701	1	100.00	50.00		
	Total for GYN-080 Mammography			1	100.00	50.00		
	Total for category SRH - Gynecology			3	150.00	65.00		85.00
SRH - Obstetrics	252101 Group & Rhesus Factor	29/07/2017	000702	1	10.00	5.00		2.50
	Total for 252101 Group & Rhesus Factor			1	10.00	5.00		2.50
	OB-010 Preg	29/07/2017	000702	1	25.00	15.00		5.00

Svcs by Prov

Reports
Financial
Svcs by Prov

Report – Service by provider - CSV

Report: List of services and products provided during a specific range of dates (e.g. today), and by service provider in CSV format to enable calculations

Select: Reports > Financial > Service by Provider and enter today's date. Select (All) Service Providers. Press Export to CSV button.

Service Provider	Category	Code	Description	Units	Price		Adjustment		Payment	
Casimiro, Nurse Des	SRH - Obstetrics	252101	Group & Rhesus Factor	1	$	10.00	$	5.00	$	5.00
Casimiro, Nurse Des	SRH - Obstetrics	OB-010	Pregnancy Test	1	$	25.00	$	15.00	$	10.00
Casimiro, Nurse Des	SRH - Obstetrics	OB-060	OB Prenatal VDRL	1	$	10.00	$	5.00	$	5.00
							TOTAL		$	20.00
Desir, Dr. Ernest	Contraception	CON-029	Depo (3 month) - Follow up - Resupply	1	$	40.00	$	10.00	$	30.00
Desir, Dr. Ernest	SRH - STI/RTI	253102	Chlamydia Antibody Test	1	$	55.00	$	25.00	$	30.00
Desir, Dr. Ernest	SRH - STI/RTI	254101	Culture Swab	1	$	20.00	$	-	$	20.00
Desir, Dr. Ernest	SRH - STI/RTI	254102	Syphilis Test	1	$	95.00	$	45.00	$	50.00
Desir, Dr. Ernest	SRH - Gynecology	GYN-010	Gyn - General Counseling	1	$	-	$	-	$	-
Desir, Dr. Ernest	SRH - Gynecology	GYN-016	GYN Breast Cancer Counseling	1	$	-	$	-	$	-
Desir, Dr. Ernest	SRH - Gynecology	GYN-035	GYN - VIA Screening	1	$	30.00	$	15.00		
Desir, Dr. Ernest	SRH - Gynecology	GYN-037	GYN - Pap Test (sampling)	1	$	20.00	$	-		
Desir, Dr. Ernest	SRH - Gynecology	GYN-080	Mammography	1	$	100.00	$	50.00		
Desir, Dr. Ernest	SRH - Gynecology	GYN-100	Manual Breast Exam	1	$	-	$	-	$	-
							TOTAL		$	215.00
DrShrotri, Laxmikant	Contraception	CON-040	Implants (2 Rods) - Initial Consult	1	$	15.00	$	5.00	$	10.00
							TOTAL		$	10.00

Rec/Inv by Pay Methods

Reports
Financial
Rec/Inv by Pay Methods

Report – Receipts/Invoices by Payment Method– Printed to PDF

Report: List of receipts/invoices indicating payment method in separate columns

Uses: End-of-day control, allows to verify cash and credit receipts.

Select: Reports > Financial> Rec/Inv by Pay Method (e.g. Cash, Credit card, etc.). You can select Facility and Cashier, as well as payment date(s). Press Print button.

Receipts/Invoices by Payment Method

-- All Facilities --   -- All Cashiers --

Payment Date ▼   From: 2017-07-29   To: 2017-07-29   Refresh   Export to CSV   Print

ID	Client	Invoice	Svc Date	Charges	Adjustments	GST	Total Paid	Balance	Cash	Check	Credit Card	Debit Card	Other	Unassigned	Voids	User
ACK/111125/01	Ackroad, RESHMA	000703	29/07/2017	175.00	75.00		60.00	40.00			60.00					
303030	Addison, ALMA	000704	29/07/2017	35.00	13.00	1.50	3.50	20.00	3.50							
303303	Addison, LINDA	000700	29/07/2017	60.00	25.00	0.63	35.63		35.63							
889922	Alvarito, JESSICA	000702	29/07/2017	45.00	25.00		10.00	10.00			10.00					
2009-11-24-001	Amber, Gloria	000701	29/07/2017	150.00	65.00		85.00		85.00							xgonzalez
Grand Totals				465.00	203.00	2.13	194.13	70.00	124.13		70.00					

Steps	Menu | Description	Financial Reports / Examples

Collection Report

Report – Sales – End of day report - Onscreen

Report: List of Clients with payments pending to be collected during a specific date (e.g. today).

Uses: Control of pending payments, by client/invoice, indicating aging periods.

Select: Reports > Financial > Collection Report, select columns, period, payment type, age criterion, aging columns and range of days in aging columns.

Press Submit button. Can select rows to be exported to Collections

The following elements can be selected
- Contact data columns
- Date range
- Payment type: Open, Due payment, Due Insurance, Insurance summary, Credits, All
- Facilities
- Payment age by service or activity date
- Number of Aging Columns
- Days in Columns

Displayed Columns:
☑ National ID ☐ DOB ☐ ID ☐ Policy ☑ Phone ☐ City
☐ Primary Ins ☐ Referrer ☐ Act Date ☐ Inactive Days ☐ Errors

Service Date: 2017-07-29 To: 2017-07-29 All
Clinic: -- All Facilities --
Age By: Service Date
Aging Columns: 3 Days/Col: 30

Name	National ID	Phone	Invoice	Svc Date	Charge	Adjust	Paid	0-29	30-59	60+	Prv	Sel
Ackroad, RESHMA			000703	29/07/2017	175.00	-75.00	60.00	40.00				☐
Addison, ALMA			000704	29/07/2017	36.50	-13.00	3.50	20.00				☐
Addison, LINDA			000700	29/07/2017	60.63	-25.00	35.63					☐
Alvarito, JESSICA			000702	29/07/2017	45.00	-25.00	10.00	10.00				☐
Amber, Gloria			000701	29/07/2017	150.00	-65.00	85.00					☐
		Report Totals:			467.13	-203.00	194.13	70.00	0.00	0.00		

Select All | Clear All | Export Selected as CSV | **Export Selected to Collections** | ☐ Without Update
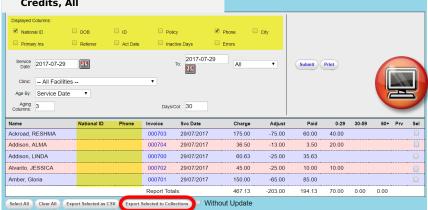
Projects

Report – Restricted Projects - Printed to PDF

Reports: List of restricted projects by Adjustment type. Examples:
- By donor (Summit)
- Projects with discount

Select: Reports > Financial > Projecs and enter today's date. Select Adjustment Type (Summit Project \| Discount). Press Print.

Restricted Projects Report

Summit Project -- All Facilities --
From: 2017-07-29 To: 2017-07-29 Refresh Export to CSV Print

Visit Date	Client ID	Visit Category	UIC Code	Voucher	Target Population	Sex	Age	Qty	S&RH Services	Receipt	Cost	Total
29/07/2017	2009-11-24-001	1 Initial Consult		Summit-985		Female	37	1	GYN - VIA Screening	000701	30.00	30.00
29/07/2017	889922	1 Initial Consult		Summit-986		Female	27	1	Group & Rhesus Factor	000702	10.00	
								1	OB Prenatal VDRL		10.00	
								1	Pregnancy Test		25.00	45.00

Restricted Projects Report

Discount -- All Facilities --
From: 2017-07-29 To: 2017-07-29 Refresh Export to CSV Print

Visit Date	Client ID	Visit Category	UIC Code	Voucher	Target Population	Sex	Age	Qty	S&RH Services	Receipt	Cost	Total
29/07/2017	2009-11-24-001	1 Initial Consult		Summit-985		Female	37	1	Gyn - General Counseling	000701	0.00	
								1	GYN - Pap Test (sampling)		20.00	
								1	GYN Breast Cancer Counseling		0.00	
								1	Mammography		100.00	
								1	Manual Breast Exam		0.00	120.00
29/07/2017	303030	2 Re-Visit / Re-Supply				Female	35	1	Implants (2 Rods) - Initial Consult	000704	15.00	
								1	C - Jadelle (2 rod/5 year Implant)		21.50	36.50
29/07/2017	303303	2 Re-Visit / Re-Supply				Female	60	1	Depo (3 month) - Follow up - Resupply	000700	40.00	
								1	C - Depoprovera (Injectable 3 mo.)		20.63	60.63
29/07/2017	ACK/111125/01	1 Initial Consult				Female	39	1	Chlamydia Antibody Test	000703	55.00	
								1	Culture Swab		20.00	
								1	Syphilis Test		95.00	
								4	C - Condoms Male (Generic)		5.00	175.00

Purpose	To review basic financial reports including sales, income and adjustments
Process description	Financial **reports** allow clinic managers and admin staff to verify every day transactions and cross-check financial data in OpenEMR with the Enterprise Resources Planning platform in place in the organization.
Pre-conditions	Client data has been entered and data quality verified.
Observations	OpenEMR provides multiple reports for revising and cross-checking data. In addition to being displayed onscreen, most reports can be exported to comma-separated value (CSV) format readable with Excel, and to PDF to be stored digitally or printed in paper.