

Administrative Reports

Log Report by Patient

Patient User, Date Time, Form Name, Action, Field Name, Old Value, New Value

To list the actions of all users in a certain date range in relation to all patients, click on the All button in the Log Report By Patient area. To list the actions in a certain date range in relation to a specific patient, select the patient from the list and then click on the Preview or Print icon.

Log Report by User

User Patient, Date Time, Form Name, Action, Field Name, Old Value, New Value

To list the actions of all users in a certain date range, click on the All button in the Log Report By User area. To list the actions of a specific user in a certain date range, select the user from the list and then click on the Preview or Print icon.

Mailing Labels

Patient Mailing Labels

Choose patients you wish to print labels for

Provider Mailing Labels

Choose providers you wish to print labels for

Drug Program Mailing Labels

Choose Drug Programs you wish to print labels for

Medication Batch

Choose Medications you wish to print labels for

Patient Chart Report

Found on the Patient Demographics Screen

Print Intake Label

Found on the Visit Detail Screen

Triage Report

Found on the Visit Detail Screen

Visit Chart

Found on the Patient Demographics Screen under the Patient Chart Option.

In addition to listing each visit this report includes detail in multiple sub reports, Appliances, Counseling, CPT, Dental Procs, Diagnosis, ICD9 Codes, Injections, Lab Tests, Office Procs, Other Procs, Provider Services, Vision Procs, Visit Type, Vital Signs, and X-Ray

Count for Type of Visit

Diagnosis, Diagnosis Count and Percent

This report summarizes the total of each type of diagnosis entered on the visit screen during a date range. Sorted by diagnosis.

CPT Procedures

Patient Name, CPT Description, CPT Code, CPT Charge and Visit Date

This report lists the CPT Codes, sorted by patient name and then by visit date.

Dental Procedure Counts by Provider with Cost

Provider Name, Dental Procedures, Count and Charge

This report is based on the dental procedures occurring during the stated date range. Sorted by provider.

Dental CDT Count by Prov Report

Provider Name, CDT Code, CDT Description, Count and Charge

This report is based on the CDT codes in the Dental Procedures during a date range. Sorted by provider.

Dental Visit Log

Provider, Provider Phone, Provider Address, City, State, Zip, Dental Procedure, Total and Cost

This report counts the number of dental procedures and sums the CDT charge between the begin and end dates.

Diagnosis by Ethnicity Report,

Diagnosis, Ethnic Origin, Count, Percent (Fields Included)

This report lists the diagnosis during a date range along with the ethnic group. Sorted by diagnosis.

Diagnosis by Ethnicity Report Count of PAP Medications,

Diagnosis, Ethnic Origin, Count, Percent (Fields Included)

This report counts the PAP's during a visit date range, along with the ethnic group of the individuals applying for PAP's related to the diagnosis. Sorted by diagnosis.

Lab Tests Counts Report

Lab Location, Lab Test, and Total

Lists any lab tests, sorted by lab location, then by type of test.

Referral Source Counts Report

Referral Source, Total Per Source and % By Source

Lists how clients found out about the clinic. Sorted by the Referral Source

Vision Procedure Counts by Provider with Cost

Provider Name, Vision Procedure, Count and Charge

This report is based on the CPT codes in the Vision Procedures during a date range. Sorted by provider.

Aggregate Reports – Client and Service Counts

Client Characteristics Report

Age, Total, Percent

An analysis of all patients by age, gender, ethnic origin, insurance type, most frequent care location, citizenship status, employment status, state, county, and zip code, of residence, income and percent of federal poverty level. Only those patients with visits that fall within the stated date range will appear in the report.

Client Counts

Client Characteristics New Patients Report

Age, Total, Percent

Client Characteristics of NEW patients in a date range.

Client Characteristics PAP Report

Age, Total, Percent

An analysis of all patients who have applied for med(s) through Patient Assistance Programs for which the med dispensed date falls within the date range specified. Includes age, gender, ethnic origin, insurance type, most freq care location, citizenship, employment status, state, county, zip, income, and % of federal poverty level. Only those patients with dispensed dates that fall within the date range will appear.

New Patients By County Report

County Of Residence, New, Percent

Counts new patients by the county they live in. This report is based on the date that a patient was entered into the system.

Client Counts Monthly

Client Age by Month

This report summarizes by month the age group of the clients having visits during date range.

Client Federal Poverty Level by Month

This report summarizes by month the poverty level of the clients having visits during date range.

Client Income by Month

This report summarizes by month the income group of the clients having visits during date range.

Service Counts

Count of Diagnosis for Visits

Diagnosis, Diagnosis Count and Percent

This report summarizes the total of each type of diagnosis entered on the visit screen during a date range. Sorted by diagnosis.

Aggregate Reports Approvals and Values

Approval Rate - By Company Report

Company Name [1-Accepted](#) [2-Rejected](#) [3-Pending](#)

[Number](#) [Percent](#) [Number](#) [Percent](#) [Number](#) [Percent](#)

Will allow users to calculate the percentage of applications that have been accepted, denied and are still pending for any date range by Company. For this report, the date used is the Ordered Date (in the Medication Info form)

Approval Rate - By Program Report

Company Name [1-Accepted](#) [2-Rejected](#) [3-Pending](#)

[Number](#) [Percent](#) [Number](#) [Percent](#) [Number](#) [Percent](#)

Will allow users to calculate the percentage of applications that have been accepted, denied and are still pending for any date range by Program. For this report, the date used is the Ordered Date (in the Medication Info form)

Delivery Times - By Company Report

[Company Name](#), [Number of Deliveries](#), [Average Number of Days](#)

Will allow users to calculate the average length of time it takes for medications to arrive by Company (calculated from Ordered Date to Received Date) by date range. For this report, the date used is the Received Date and the Status MUST be changed to Accepted.

Delivery Times - By Program Report

[Company Name](#), [Number of Deliveries](#), [Average Number of Days](#)

Will allow users to calculate the average length of time it takes for medications to arrive by Program (calculated from Ordered Date to Received Date) by date range. For this report, the date used is the Received Date and the Status MUST be changed to Accepted.

Medication Value - By Company Report

[Company Name](#), [Minimum](#), [Maximum](#), [Average](#), [Total](#)

Will allow users to determine the value of the drugs that have been accepted and are obtained through patient assistance programs by Company. For this report, the date used is the Dispensed Date and the Status MUST be changed to Accepted (in the Medication Info form).

Medication Value - By Drug Report

[Medication Name](#), [Minimum](#), [Maximum](#), [Average](#), [Total](#)

Will allow users to determine the value of the drugs that have been accepted and are obtained through patient assistance programs by drug. For this report, the date used is the Dispensed Date and the Status MUST be changed to Accepted (in the Medication Info form).

Medication Value - By Program Report

[Program Name](#), [Minimum](#), [Maximum](#), [Average](#), [Total](#)

Will allow users to determine the value of the drugs that have been accepted and are obtained through patient assistance programs by Program. For this report, the date used is the Dispensed Date and the Status MUST be changed to Accepted (in the Medication Info form).

Reorder Applications by Program Report by Date Range

Program, Patient, Medication #, Phone, Medication Dosage, SSN, Quantity, Date Of Birth, Reorder Date, Doctor and Received Date

This report lists medications to be reordered by program and by the method of reordering (Phone or Application) for those medications that have a reorder date within a selected date range. For this report to work properly, on the Medication Info screen the status must be listed as Pending or Accepted, the Reorder Date must fall within the date range specified for the report.

Provider Reports

Provider Hours By Type Report

Provider Position, Provider Name, Provider Time Expended, Hourly Rate and Amt Pd

Lists the total hours and charges for each provider by type where the visit date falls within the date range specified.

New Providers by Date Report

Date Created, Provider Full Name and Practice Name

Lists new providers entered into the system as of 10/1/2007. Based on the date entered into the system.

Number Of Providers By Type Report

Provider Position and Number Of Providers

Lists the total number of providers by type where the visit date falls within the date range specified.

Patients (with meds) by Provider

Provider Name, Patient Name and No of Visits

Lists the providers and those patients for whom they have prescribed medications. The visit date must fall between the begin and end dates.

Patients and Visits by Provider

Provider Name, Patient Name and No of Visits

This report is sorted by the Provider chosen on the Visit Detail screen. The visit date must fall between the begin and end dates.

Provider Availability Report

Provider Name Provider Type Specialty, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday and Sunday

Lists all providers, provider type and their availability by day and time of day.

Providers by Practice

Practice Name, Provider Name, and Provider Type fields and is sorted by Practice name

This report lists Providers by Practice Name.

Provider Hours by Date

Date, Provider Name, Start Time, End Time and Hours

This report summarizes the total provider hours during a date range.

Total Providers by Date Report

Visit Date by Month, Visit Date, Provider Position, Total Providers and Total Hours

Lists the total hours for each provider by month where the visit date falls within the date range specified.

Medications Received Report

Drug Applied For, Patient Name, Med Received Date, , Clinic Pat ID and Provider Name

Based on medication received date. Allows users to see which medications have been received for patients. Also lists prescriber.

Medications Received by Quantity Report

Medication, Qty, Dosage, Dose Form, Cost, New/Refill, Med Received Date, Clinic Patient ID, Drug ID and Patient Name

Received meds in a date range. Sorted by med.

All Pending Applications Report

Name, Social Security Number Company Name, Date of Birth, Program Name, Phone, Drug Applied For, Date Ordered and Estimated Arrival

Lists all PENDING patient assistance program (PAP) applications. Allows users to follow up when application processing is delayed.

Pending Applications by Date Range Report

Name, Social Security #, Company Name, Date of Birth, Program Name, Phone, Drug Applied For, Date Ordered and, Estimated Arrival

Lists all PENDING patient assistance program (PAP) applications for patients for which the estimated arrival date falls within the date range specified. Allows users to follow up when application processing is delayed.

Pending Applications Not Ordered Report

Name, Social Security Number, Company Name, Date of Birth, Program Name, Phone, Drug Applied For, Date App Submitted and Provider Signature

Lists any applications not yet submitted. For this to work, the Date Ordered field must be blank.

Pending Applications Ordered and Not Received Report

Patient Name, Clinic Patient ID, Drug Applied For, Pharmaceutical Number, Visit Date, Date Ordered and Physician

Lists medications which have an ordered date, but no received date.

Prescriptions By Patient Report

Name, Drug Applied For, Date Ordered, Date Dispensed, Price, Quantity and Drug Value

Lists all patients that have received medication through patient assistance programs and the name of the medications dispensed. Only those patients with dispensed dates that fall within the date range specified will be included.

Recalled Medications by Date Received

Fields Included are: Medication, Medication ID No, Manufacturer, Patient Name, Quantity, Form, Cost, Lot No, NDC Code and Medication Received Date

This report lists any received medications, including the lot # to facilitate finding which patients have been prescribed a recalled medication. The received date MUST be filled in. It is sorted by the medication name.

Refill Tracking Report

Name , Pharmaceutical Company, Social Security Number , Date of Birth , Clinic's Patient ID, Date Ordered, Date Rcvd. , DEA# , Reorder By, Address, Drug Applied For, Pharmaceutical Number, Program Phone, Patient Phone, Exp Arr Date, Reorder Date, National ID and App St

Lists all medication refills for patients for which a medication date (Date Ordered) has been provided and for which the reorder date falls within the date range specified. Allows users to follow up with patients when it is time to apply for a refill.

Medical History

Patient Name, Medical Condition

Lists history of patient medical conditions

Referrals - All by Provider Report

Referred By, Patient Name, Referral Date, Referral Facility, Referral Type and Referral Reason

Shows all patient referrals grouped by provider.

Referrals Open by Patient Report

Patient, Referral Date, Referral Type, Referral Facility, Reason For Referral

Shows all referrals within a date range that have not been completed.

Referrals by Specialty

Specialty, Referred by, Patient Name, Referral Date, Referral Facility, Referral Type, Referral Reason

This report lists Referrals sorted by Specialty.

Total Patient Visits Report

Visit Type, Patient Name, Visit Date, No Show and Reason For Visit

Lists all patients, visits, types of visits, and reason for visit for all patient visits that fall within the date range specified.

Total Visits by Type

Fields Included are: Visit Type, Patient Name, Visit Date, No Show, Diagnosis, Provider

This report list patients by the type of visit they had. The providers name must be chosen on the Visit Detail Screen.

Vision Info by Patient

Patient Name, Visit Date, Provider Name, Vision Procedure, CPTCode, CPTDescription and Charge

This report is based on the CPT codes in the Vision Procedures during a date range. Sorted by patient.

Visits By Diagnosis Report

Diagnosis Client Name, Date Of Birth, Age, Ethnic Origin, % Of Diagnosis and Visit Date

Based on a date range. Groups on the Diagnosis entered on the Visits screen. Allows users to see a list of patients with visits associated with specific diagnoses.

Medication Reports

All Medications Ordered with Cost

Patient Name, Date Ordered, Clinic Patient ID, Drug Applied For, Total Cost, Med Date Ordered and Provider Name

This report lists all medications ordered with their recorded costs. Sorted by patient, then by visit date. Ordered date must fall between the begin and end dates.

Meds Dispensed by Drug Report

Drug Applied For, Patient Name, Med Dispensed Date and Provider Name

Based on medication dispensed date. Allows users to see which prescriptions have been dispensed to which patients during a certain date range. Also lists prescriber.

Meds Dispensed - By Patient Report

Patient Name, Clinic's Patient ID, Drug Applied For, Med Dispensed Date and Provider

Based on medication dispensed date. Allows users to see which prescriptions have been dispensed to which patients during a certain date range. Also lists prescriber.

Patient Reports

New Patient Listing by County Report

Patient Name, Address, City, State, Zip, and New Date

Lists new patients by the county they live in. This report is based on the date that a patient was entered into the system.

Patients Disenrolled Report

Patient Name, Address, City, State, Zip, Date Disenrolled and Reason Disenrolled

Lists patients disenrolled in a date range.

Patient Insurance Type Report

InsuranceType, Insurance Name, Insurance No, Policy Holder, Med Coverage and Patient Full Name

Lists type of Insurance patient has. Sorted by type.

Patient Listings

Patient Name, Address, Social Security Number, City, Date of Birth, State, Zip, Phone, Clinic's Patient ID and Clinic ID

Lists and Counts Patients by Criteria

Visit Reports

Counseling Services

Includes Patient Name, Counseling service and Visit Date

This report lists the counseling services received, sorted by patient name and then by visit date.

Dental Info by Patient

Includes Patient Name, Visit Date, Provider Name, Dental Procedures, CDT Codes, CDT Description and Charge

This report is based on the dental procedures occurring during the stated date range. Sorted by patient.

Follow Up Report

Includes Patient Name, Clinic Patient ID, Visit Date, Follow Up Date and Follow Up Reason

Lists follow up visits by patient where the follow up date falls within the date range specified. Allows users to track follow-up appointments scheduled for a certain date range.

ICD9 By Date Range Report

Includes ICD-9 Code, ICD-9 Category, Client Name, DOB, Age, Ethnic Origin and Visit Date

Based on a date range. Groups on the ICD-9 Code entered on the Medication Info screen. Allows users to see a list of patients with visits associated with specific diagnoses as defined by the ICD-9 code.

ICD9 Codes by Visit Date

Includes Visit Date, ICD9 Code, Code Description and Patient Name

Lists the ICD9 procedures listed on the Visit Detail Page. The visit date must fall between the begin and end dates. Sorted by visit date in descending order.

Injections by Patient Report

Clinic Patient ID, Patient Name, Injections and Visit Date

Types of injections received by patient. Sorted by patient name, then by visit date, then by type of injection.