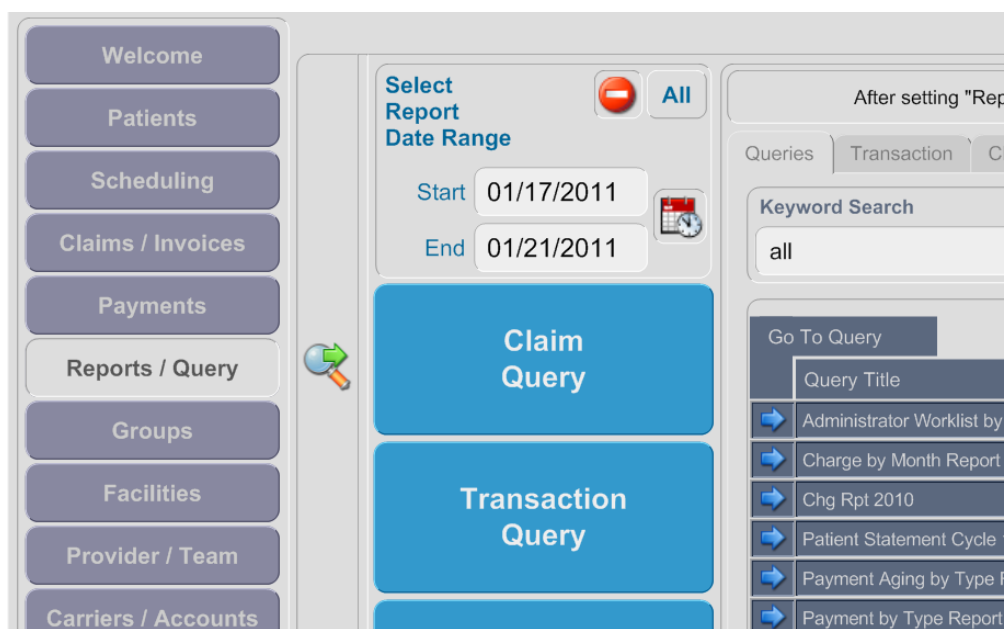




### Reports - Patients by Procedure

This tutorial describes how to create a list of patients who had a given procedure within a given time frame.

- From the **Reports / Query** menu, go to the **Transaction Query**.



- Clear the query by clicking on the red minus icon to the right of the query screen.



- On the **CHG** tab, enter the CPT code to search, for example 88305.

## Reports – Patients by Procedure

TR	CHG	PMT	ADJ	CAR	PRV	PT	BAL	TRK	RFD	
Procedure										
D.O.S.			CPT	88305						
Modifiers										

- Select a date of service within the calendar year of 2010. In the Calendar selector, click on “This Year”. Then change to 2010, January 1<sup>st</sup> to 2010, December 31<sup>st</sup>. This narrows the search to the date of service within 2010 and the procedure code 88305.

- On the **TR** tab, select a “TR Type” of “CL”, which is a charge line.

TR	CHG	PMT	ADJ	CAR	PRV	PT	BAL	TRK	RFD	ENH	RPT	QTR	FXA	FXB	FXC	RSP	ID	MRK	APL	CLB	PO	AUX	CLT	CPE
TR Date			TR ID		Claim		TR Type		Notes															
From			Claim #				<input type="radio"/> AC <input type="radio"/> BP <input type="radio"/> NC <input type="radio"/> PI <input type="radio"/> RC <input type="radio"/> SR <input type="radio"/> AI <input checked="" type="radio"/> CL <input type="radio"/> OL <input type="radio"/> PL <input type="radio"/> RI <input type="radio"/> UN <input type="radio"/> AL <input type="radio"/> HC <input type="radio"/> PA <input type="radio"/> PP <input type="radio"/> RL <input type="radio"/> VL <input type="radio"/> AP <input type="radio"/> HT <input type="radio"/> PC <input type="radio"/> PR <input type="radio"/> RP																	
To			PT ID																					
1	TR Date	TR ID	Claim #	Patient ID	OPEN	PROC	VER																	

## Reports – Patients by Procedure


- Run the query by clicking on the blue down arrow to the right of the query screen.



This will list set of transactions that meet the criteria.

TR Date	TR ID	Claim #	Patient ID	OPEN	PROC	VER	TR Type	Notes		
Cassidy, S.	01/07/2010	TRA764	CLA35	PAA1	Y		CL	Transaction Level Charge	88305 Level IV - TISSUE EXAM BY	
Munster, H.	04/06/2010	TRA1238	CLA44	PAA15	Y	Y	N	CL	Transaction Level Charge	88305 Level IV - TISSUE EXAM BY
Colmax, B.	02/02/2010	TRA1373	CLA49	PAA12	Y	N	Y	CL	Transaction Level Charge	88305 Level IV - TISSUE EXAM BY
Colmax, B.	03/03/2010	TRA1374	CLA50	PAA12	Y	N	Y	CL	Transaction Level Charge	88305 Level IV - TISSUE EXAM BY
Colmax, B.	04/24/2010	TRA1384	CLA51	PAA12	Y	N	Y	CL	Transaction Level Charge	88305 Level IV - TISSUE EXAM BY

- To see the patients who are linked to these transactions, click on the “P” in the

upper right corner. 

Now you will see the related patients who match the selected criteria.

PT Name	Address	City	State	Zip Code	Phone	SSN	Sex	Age	Date of Birth
Cassidy, S.	522 Plaza Blvd	Santa Fe	NM	87505	505-423-6969	364-10-1010	Female	20	03/10/1991
Colmax, B.	211 Forth St	Bellevue	WA	98015	425-741-1414	123-45-6789	Male	51	02/21/1960
Munster, H.	1313 Mockingbird Lane	Rosedale	IN	47874	787-987-4569	888-44-7777	Male	90	01/09/1921