

Patient Claims in Date Range



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In this section, we will look at establishing a list of patients who have had claims within a given time range.

We begin by going to the **Reports/Query** menu. This process could be accomplished either from the Claim Query, or the Transaction Query. We will create this report from the Claim Query.

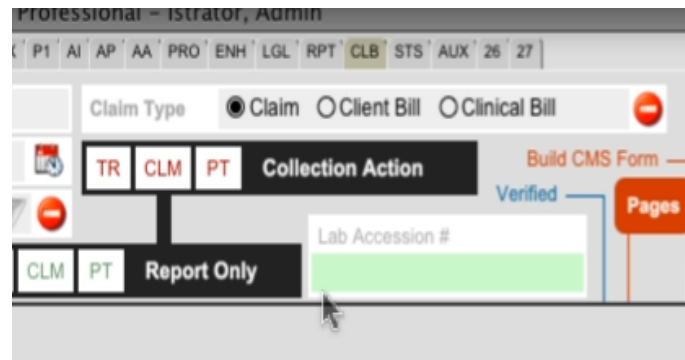


When we enter the Claim query, we begin by clearing the Claim query by clicking on the red minus icon.

Now we need to set our search parameters.

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We are going to be looking for claims only, so we select 'Claim' as the Claim Type. This step is only necessary if you have both the Client Bill and the standard Easy Billing modules.



Let's say we are only interested in patients who have claims from January 1, 2010 through June 30, 2010. We select the beginning and ending dates from the calendar. Click the green check to make the selection. Then, click the blue down arrow to run the query.

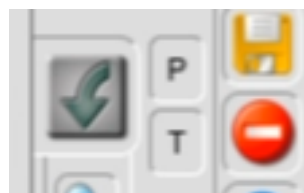


We now have a list of claims from the first half of 2010.

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CLM	FIN	MED	PAY	CAR	PRV	NPI	PT	WKL	TR1	TR2	PT1	QCL	FIX	P1	AI	AP	AA	PRO	ENH	LGL	RPT	CLB	STS	AUX	26	27		
Easy Billing Professional - Istrator, Admin																												
Claim # [] Notes [] Claim Type <input checked="" type="radio"/> Claim <input type="radio"/> Client Bill <input type="radio"/> Clinical Bill																												
CL Date - Range From 01/01/2010 To 06/30/2010																												
Collection Action: TR CLM PT																												
Report Only: TR CLM PT																												
Cassidy S	01/07/2010	Complete	Open	Ready Elec																								
Fudd E	03/21/2010	Open	Verified	Ready Elec																								
Smart M	03/24/2010	Complete	Open	Verified	Ready Elec																							
Munster H	04/06/2010	Processed	Open	Ready Elec	Not Verified																							
Anderson S	04/06/2010	Processed	Open	Verified	Ready Elec																							
Whitmore S	04/06/2010	Processed	Open	Ready Elec	Not Verified																							
Jones M	04/15/2010	Open	Verified																									
Colmax B	02/02/2010	Open	Un-processed	Verified																								
Colmax B	03/03/2010	Open	Un-processed	Verified																								
Colmax B	06/17/2010	Open	Un-processed	Verified																								
Cassidy S	06/22/2010	Open	Un-processed	Verified	Ready Elec																							

By clicking on the “P” at the top right of your screen, we find the set of patients that match the claims we had in the claim query.



Thus, we find all the patients who have had claims in the first half of 2010 as shown here.

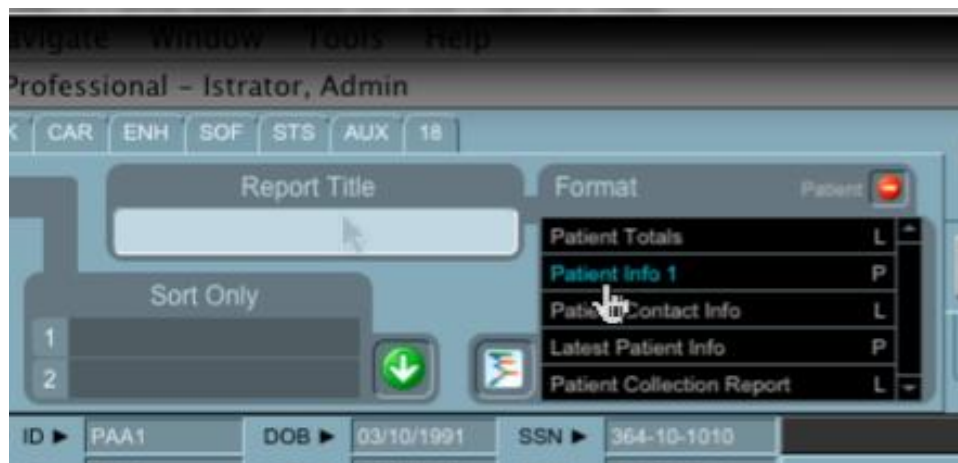
PT Name	First	Mid	Last	ID	State	SSN	Address	City	Zip Code	Phone	Sex	Date of Birth
Cassidy, S.							522 Plaza Blvd	Santa Fe	NM 87505	505-423-6969	Female	03/10/1991
Fudd, E.							12111 No Street	Pine Bush	NY 12566	505-646-6633	Male	05/01/1949
Jones, M.							78 Hampton Ct	Bellevue	WA 98015	425-963-6363	Male	06/30/1989
Colmax, B.							211 Forth St	Bellevue	WA 98015	425-741-1414	Male	02/21/1960
Smart, M.							185544 Control Headquarters Lane	Boston	MA 02212	999-999-9999	Male	01/01/1945
Munster, H.							1313 Mockingbird Lane	Rosedale	IN 47874	787-987-4569	Male	01/09/1921
Anderson, S.							87478 Pleasant Street	Grayland	WA 98547	887-998-4454	Female	05/14/1988
Whitmore, S.							8747 Long Island Drive	Grayland	WA 98547	478-547-8547	Female	09/05/1951

If you wish to see a report of these patients, you could, for example, sort them by state, then by city. These selections will also give you summaries by city and state.

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You can look at the Patient Info report by selecting the Patient Info format and then clicking on the report button.



This report gives us a break down by state and city of all the patients listed in the query.

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Easy Billing Professional - Istrator									
PT ID	Patient Name	D.O.B.	Default Provider	First Tran.	Last Tran.	First Proc.	Last Proc.	S.O.F. Date	Age
PAA13	Shaner, H.	03/09/1921	Smith, Zachary, Dr., M.D.	04/06/2010	10/05/2010	08/21/2010	01/15/2011	04/05/2008	90
			City Rosedale	Count	1			Average Age	90
			State IN	Count	1			Average Age	90
PAA14	Smart, M.	01/01/1941	Smith, Zachary, Dr., M.D.	03/24/2010	03/24/2010	08/09/2010	01/10/2011	01/01/2009	66
			City Boston	Count	1			Average Age	66
			State MA	Count	1			Average Age	66
PAA1	Carody, S.	05/10/1991	Olson, Sharon, PT	08/24/2009	12/23/2010	05/11/2010	01/15/2011	10/12/2009	19
			City Santa Fe	Count	1			Average Age	19
			State NM	Count	1			Average Age	19
PAA8	Fuld, E.	05/01/1940	Olson, Sharon, PT	03/21/2010	03/21/2010	08/09/2010	12/31/2010	09/15/2009	61
			City Pine Bush	Count	1			Average Age	61
			State NY	Count	1			Average Age	61
PAA10	Jones, M.	06/30/1989	Smart, George, MD	03/30/2010	03/30/2010	08/21/2010	12/31/2010	03/15/2010	21
PAA12	Colmes, B.	02/21/1990	Smart, George, MD			06/16/2010	01/15/2011	11/16/2009	20
			City Bellevue	Count	2			Average Age	36
PAA17	Anderson, S.	05/14/1988	Maslake, Kevin L, MD	04/06/2010	04/06/2010	08/09/2010	01/15/2011		22
PAA18	Whitman, S.	09/05/1951	Maslake, Kevin L, MD	04/06/2010	04/06/2010	08/21/2010	01/10/2011		59
			City Graysland	Count	2			Average Age	41
			State WA	Count	4			Average Age	38
Grand Totals				Count	8			Average Age	49