

# Reports – Query Basics



## Query Basics

In this section we look at some report query basics. We begin in the **Transaction Query** from the **Reports/Query** menu. We will look at what are some of the operations in the query.



First you will click on the red minus button on the right to clear the query in its entirety, clear all of the parameters within all of the fields and remove the found set.

You will also see a blue down arrow. This button performs the query based on whatever data is loaded into the query.



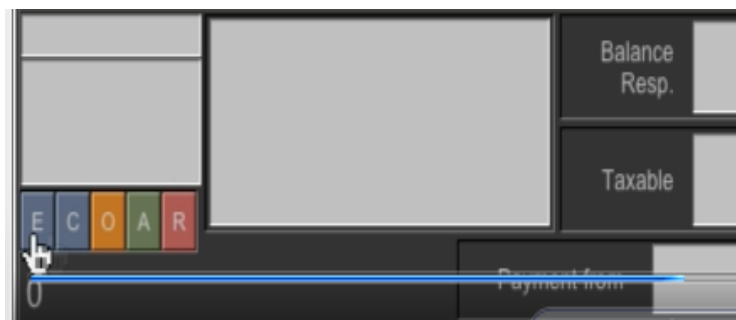
## Reports – Query Basics

You will also see a button with a green down arrow, which is for loading an existing query which has already been saved.

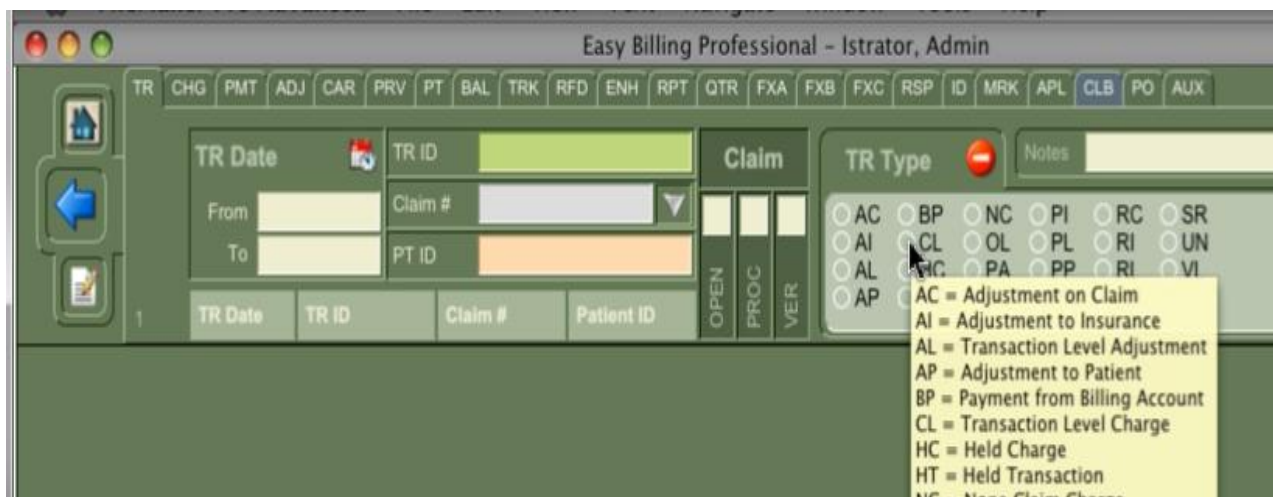
The green disk button is the save button, which will allow you to save queries.



Additionally, in the lower left area you'll notice "E", "C", "O", "A", "R" buttons. These buttons carry out different tasks which help to narrow down data as needed.



Let's start with something simple, like finding only charge lines. We begin in the **TR** tab and select the "CL" transaction code in the "TR Type" field.



## Reports – Query Basics

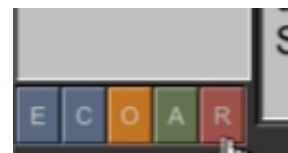
When we run the query, we find only charge lines.



The screenshot shows the 'Easy Billing Professional' interface. At the top, there are menu options: TR, CHG, PMT, ADJ, CAR, PRV, PT, BAL, TRK, RFD, ENH, RPT, QTR, FXA, FXB, FXC, RSP, ID, MRK, APL, CLB, PO, AUX. Below the menu is a search area with fields for TR Date (From/To), TR ID, Claim #, PT ID, Claim, and TR Type. The TR Type section includes radio buttons for various codes: AC, BP, NC, PI, RC, SR, AI, CL, OL, PL, RI, UN, AL, HC, PA, PP, RL, VL, AP, HT, PC, PR, RP. The main area displays a table of results:

TR Date	TR ID	Claim #	Patient ID	OPEN	PROC	VER	TR Type	Notes		
Cassidy, S.	08/24/2009	TRA4	CLA5	PAA1	Y		CL	Transaction Level Charge	98941 Manipulation Spine 3-4	
Cassidy, S.	08/25/2009	TRA7	CLA6	PAA1	Y	Y	CL	Transaction Level Charge	99212 OFFICE/OUTPATIENT VISIT, EST	
Cassidy, S.	08/25/2009	TRA8	CLA6	PAA1	Y	Y	CL	Transaction Level Charge	97014 Electrical Muscle Stimulation	
Cassidy, S.	08/26/2009	TRA9	CLA7	PAA1	Y	Y	Y	CL	Transaction Level Charge	99212 OFFICE/OUTPATIENT VISIT, EST
Corbett, R.	08/27/2009	TRA19	CLA11	PAA6	Y	N	CL	Transaction Level Charge	98941 Manipulation Spine 3-4	
Cassidy, S.	09/01/2009	TRA22	CLA13	PAA1	Y	N	CL	Transaction Level Charge	98942 Manipulation Spine 5+	
Cassidy, S.	09/01/2009	TRA23	CLA13	PAA1	Y	N	CL	Transaction Level Charge	97014 Electrical Muscle Stimulation	
Corbett, R.	08/31/2009	TRA29	CLA12	PAA6	Y	N	CL	Transaction Level Charge	11006 DEBRIDE GENT/PERIABDOM WALL	
Corbett, R.	08/31/2009	TRA30	CLA12	PAA6	Y	N	CL	Transaction Level Charge	97014 Electrical Muscle Stimulation	
Corbett, R.	08/25/2009	TRA32	CLA9	PAA6	Y	N	Y	CL	Transaction Level Charge	99203 OFFICE/OUTPATIENT VISIT, NEW
Corbett, R.	08/25/2009	TRA33	CLA9	PAA6	Y	N	Y	CL	Transaction Level Charge	98941 Manipulation Spine 3-4
Cassidy, S.	09/04/2009	TRA34	CLA14	PAA1	Y	N	Y	CL	Transaction Level Charge	98942 Manipulation Spine 5+

Let's say we want to add to this list any adjustments. We do not want to lose the charge lines that we already have, so we want to reset the query by clicking the 'R' button at the bottom. This button clears out the query information *without* clearing the found set.



Let's say we are only interested in line level adjustments.

We select on the "AL" transaction type for Transaction Level Adjustments.

## Reports – Query Basics

TR CHG PMT ADJ CAR PRV PT BAL TRK RFD ENH RPT QTR FXA FXB FXC RSP ID MRK APL **CLB** PO AUX

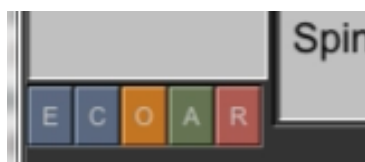
Claim

TR Type E Notes

AC  BP  NC  PI  RC  SR  
 AI  CL  OL  PL  RI  UN  
 AL  HC  PA  PP  RL  VL  
 AP  HT  PC  PR  RP

OPEN PROC VER

By clicking the Extend button labeled “E”, we keep the current found set and add the new criteria to the list.



There are some new AL's that are now in this list.

TR CHG PMT ADJ CAR PRV PT BAL TRK RFD ENH RPT QTR FXA FXB FXC RSP ID MRK APL **CLB** PO AUX

TR Date TR ID  Claim  TR Type E Notes

From  Claim #

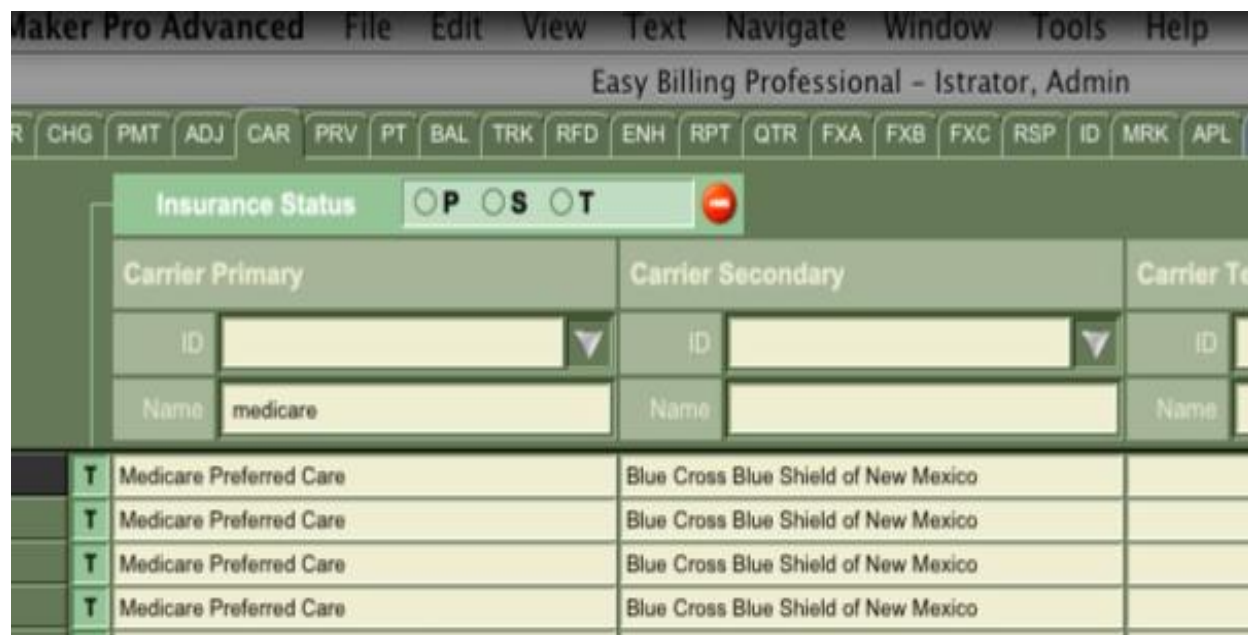
To  PT ID

	TR Date	TR ID	Claim #	Patient ID	OPEN	PROC	VER	TR Type	Notes
	06/24/2009	TRA1463	CLA31	PAA10	Y			CL	Transaction Level Charge
Jones, M.	10/08/2009	TRA1463	CLA31	PAA10	Y			CL	Transaction Level Charge
Cassidy, S.	12/09/2009	TRA1464	CLA20	PAA1	Y	Y		CL	Transaction Level Charge
Cassidy, S.	12/09/2009	TRA1465	CLA20	PAA1	Y	Y		CL	Transaction Level Charge
Cassidy, S.	12/09/2009	TRA1466	CLA20	PAA1	Y	Y		CL	Transaction Level Charge
	09/09/2010	TRA1469	CLA81		Y	N		CL	Transaction Level Charge
Munster, H.	10/05/2010	TRA1480	CLA103	PAA15	Y	N		CL	Transaction Level Charge
	08/26/2010	TRA1495	CLA81		Y	N		CL	Transaction Level Charge
Colmax, B.	06/25/2010	TRA1502	CLA49	PAA12	Y	N	Y	AL	Transaction Level Adjustment
Colmax, B.	06/25/2010	TRA1503	CLA34	PAA12	Y	Y		AL	Transaction Level Adjustment
Colmax, B.	06/25/2010	TRA1504	CLA34	PAA12	Y	Y		AL	Transaction Level Adjustment
Corbett, R.	10/20/2010	TRA1505	CLA110	PAA6	Y	N	Y	CL	Transaction Level Charge

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Let's say we want to narrow down these charge lines and adjustments to only those that are related to Medicare. We click the “R” button to reset, which will clear the query without removing the found set.

We select the Carrier tab labeled ‘CAR’ and type in “medicare” in the name field to narrow our search to Medicare only.



Then we run the Constrain by clicking the “C” button. The Constrain will limit the find to the current found set that is already in the list.



Now we have only charges and adjustments which have Medicare as the primary insurance carrier.