

Reports – Revenue By Provider



Report: Revenue by Provider

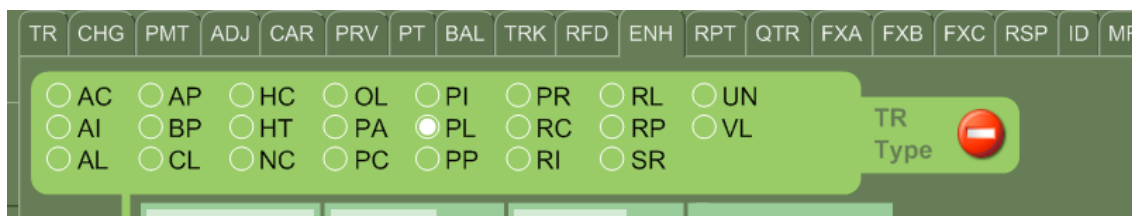
In this example, we will generate a report based on payments received, summarized by rendering provider, within the year 2010.

- We begin by going to the **Reports/Query** menu and selecting **Transaction Query**.

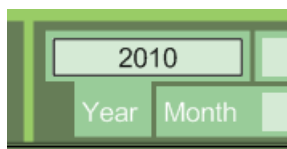
- Always begin by clearing the query, by clicking the red minus icon on the right.



- We will select the **ENH** tab. It has almost all the options we need to make this query.
- We are only interested in payments that have been applied against line charges. The “TR Code” for that is “PL”. Transactions codes of “PL” will be the only items which will be attached to a provider. Actual payments are not specifically related to any provider until they are applied to a charge line.



- We also want to set the year 2010. So we've set our criteria as line level payments for the year 2010.

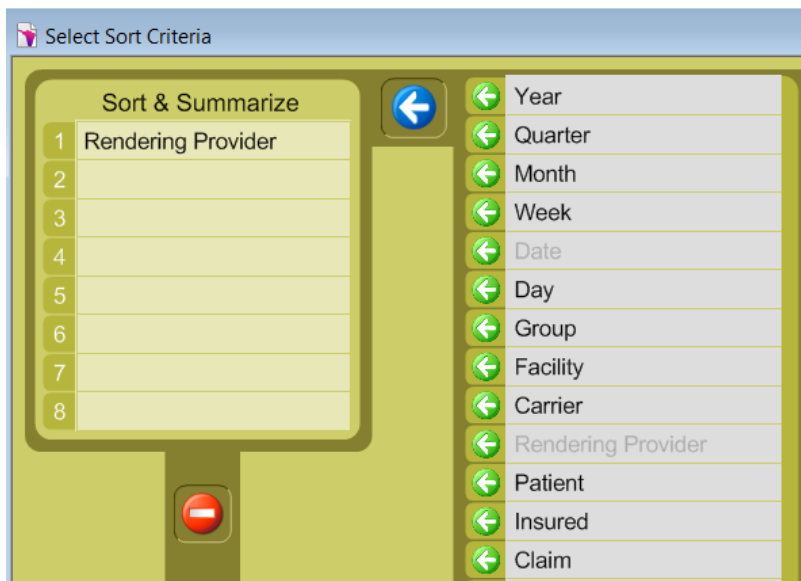


- Click the blue down arrow to run the query and view the found set.

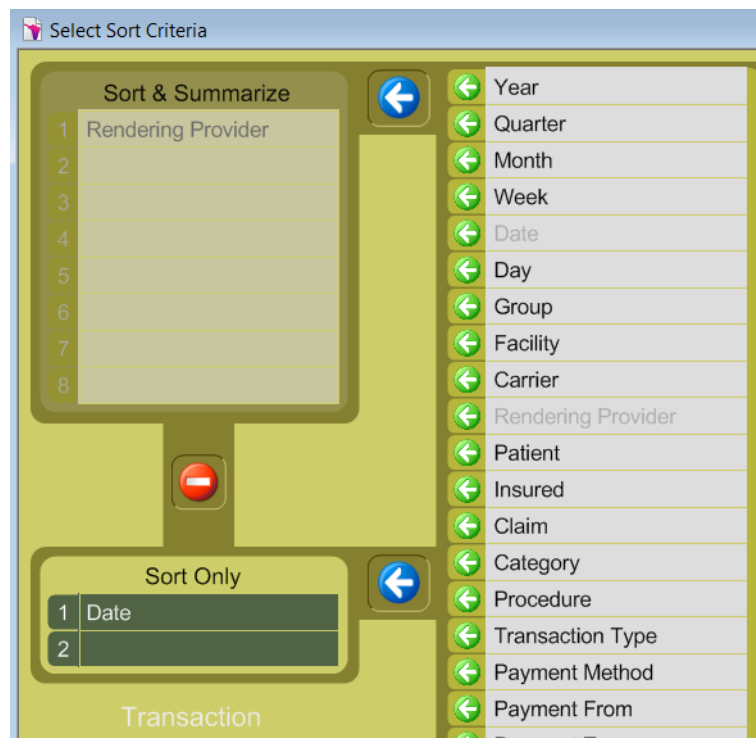


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- We can set up a report for this found set by going to the RPT tab. We will summarize this report by Rendering Provider.

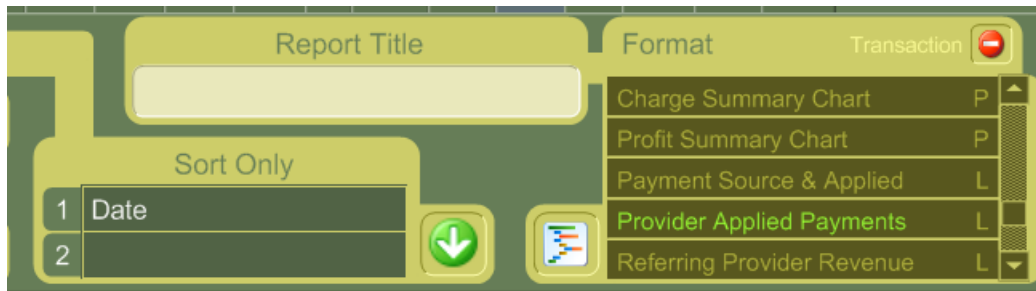


- You can also sort the list without getting a summary at that level. In Sort Only, we put in the Date. So this report will be summarized by Rendering Provider and sorted by the Date.

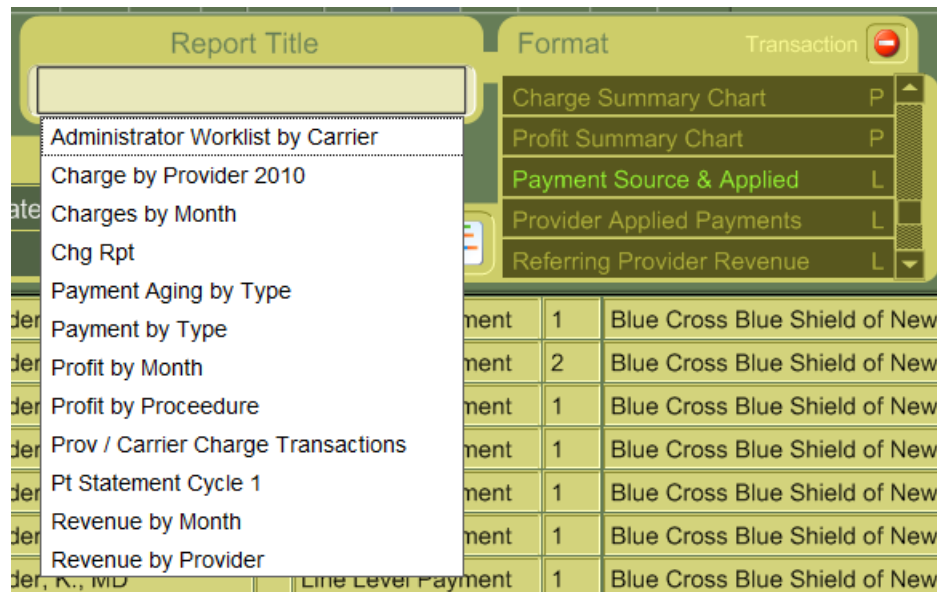


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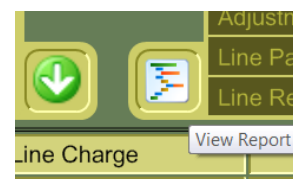
- We will choose the “Provider Applied Payments” report as the “Format”.



- In the “Report Title” field, we will select “Revenue by Provider” as it’s already in the list.



- Click on the report button to sort the data according to the criteria selected and view the layout.



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Here is the report, summarized by Rendering Provider and sorted by date.

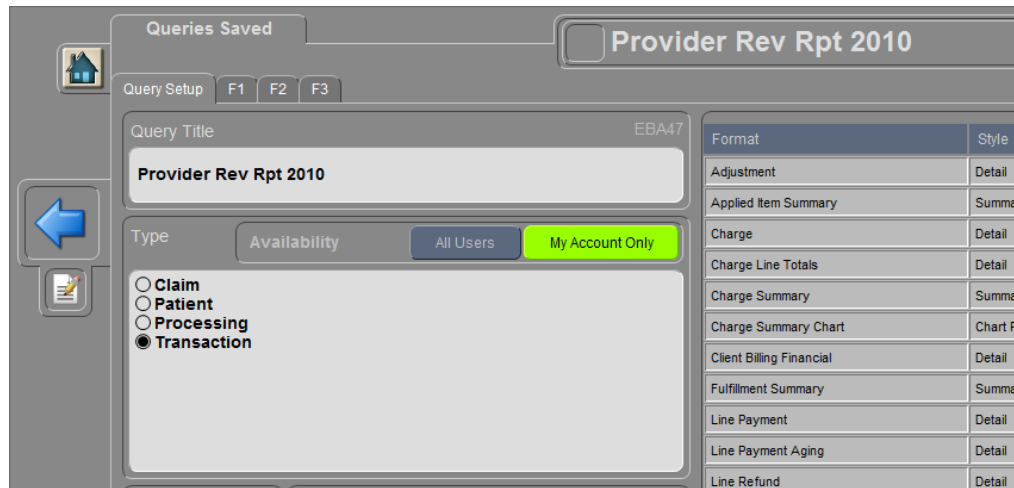
TR Date	Deposit Status (Y = Yes)	Deposit Date	Actual Payment	Applied Payment	Un-Apld Amount	Claim Open	Type	Origin
	Item Description					Claim ID #		Patient
06/01/2010	Pmt on 98941 DOS 8/27/2009 #7412369			35.00		CLA11	Y 1	Corbett, R. A
06/01/2010	Pmt on 32145 DOS 8/27/2009 #7412369			544.00		CLA11	Y 2	Corbett, R. A
06/01/2010	Pmt on 87784 DOS 8/27/2009 #7412369			59.00		CLA11	Y 1	Corbett, R. A
06/01/2010	Pmt on 32145 DOS 8/27/2009 #987987			-200.00		CLA11	Y 1	Corbett, R. A
06/01/2010	Pmt on 98942 DOS 9/1/2009 #987987			45.00		CLA13	Y 1	Cassidy, S. A
06/01/2010	Pmt on 97014 DOS 9/1/2009 #987987			45.00		CLA13	Y 1	Cassidy, S. A
06/01/2010	Pmt on 47811 DOS 9/1/2009 #987987			25.00		CLA13	Y 1	Cassidy, S. A
06/01/2010	Pmt on 99203 DOS 9/4/2009 #987987			135.00		CLA14	Y 2	Cassidy, S. A
06/01/2010	Pmt on 98942 DOS 9/4/2009 #987987			45.00		CLA14	Y 2	Cassidy, S. A
06/01/2010	Pmt on 10021 DOS 9/4/2009 #987987			55.00		CLA14	Y 2	Cassidy, S. A
06/01/2010	Pmt on 97014 DOS 9/4/2009 #987987			45.00		CLA14	Y 2	Cassidy, S. A
06/22/2010	Pmt on 99212 DOS 8/28/2009 #96325			20.00		CLA8	Y 1	Cassidy, S. A
09/01/2010	Pmt on 44444 DOS 9/1/2010 #58787			100.00		CLA87	Y 1	Jones, J. A
09/01/2010	Pmt on 44444 DOS 9/1/2010 #58787			95.00		CLA87	Y 1	Jones, J. A
Maulder, Kevin L, MD				1,048.00				
06/08/2010	N			20.00		CLA35	Y P	Cassidy, S. P
06/22/2010	N CA		10.00	10.00		CLA52	Y P	Cassidy, S. P
11/18/2010	Pmt on 99212 DOS 11/6/2010 #45454 for \$400.00			45.00		CLA111	Y P	Cassidy, S. A
11/18/2010	Pmt on 97014 DOS 11/6/2010 #45454 for \$400.00			45.00		CLA111	Y P	Cassidy, S. A
12/22/2010	N CA		10.00	10.00		CLA52	Y P	Cassidy, S. P
Obrien, Sharon, PT				20.00	130.00			
04/20/2010	Pmt on 88305 DOS 11/16/2009 #987563			85.00		CLA34	Y 1	Colmax, B. A
04/20/2010	Pmt on 88312 DOS 11/16/2009 #987563			60.00		CLA34	Y 1	Colmax, B. A
04/20/2010	Pmt on 88305 DOS 2/2/2010 #987563			65.00		CLA49	Y 1	Colmax, B. A
04/20/2010	Pmt on 88305 DOS 3/3/2010 #987563			90.00		CLA50	Y 1	Colmax, B. A
06/25/2010	Pmt on 88305 DOS 3/3/2010 #54458 for \$250.00			192.00		CLA50	Y P	Colmax, B. A
Smart, George Charles, Jr., Captain, MD				492.00				
Grand Totals				20.00	1,670.00			

- To save this report, click on the green disk icon in the top right corner.

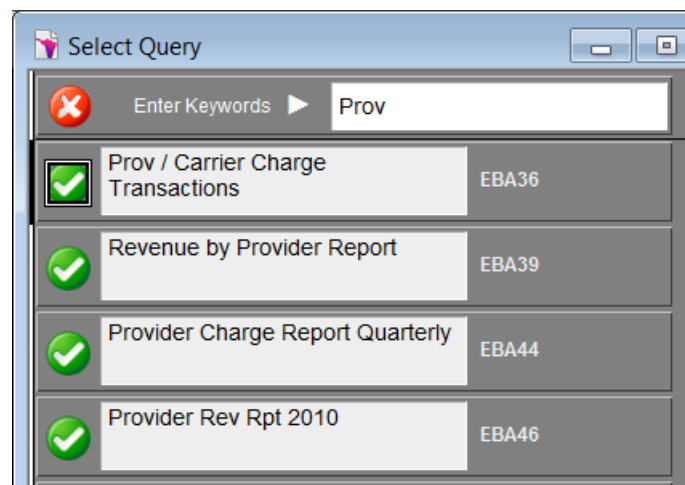
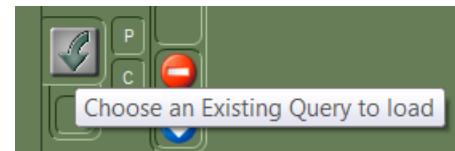


- Set the “Query Title” to “Provider Rev Rpt 2010.” Click the blue Back Arrow to save this query.

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- If you clear the query out and you want to load the query again, click on the green arrow button.
- In the Keyword search, type “All”, or three periods (...), to find all of the queries, or use the standard type ahead method to narrow the list of queries to search.



- Select the report titled “Provider Rev Rpt 2010” and then run the query again by clicking on the blue down arrow. The query will run based on the values that were originally set. If you go back into the **ENH** tab, you will see that the criteria “PL” and 2010 are set. The report format and title are also selected on the **RPT** tab. Thus, if we run the report, we will get the same report.