



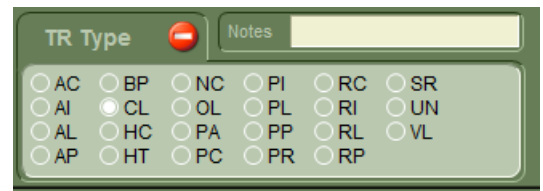
Report: Charges by Provider

In this example, we will look at building a charge line report summarized and totaled by rendering provider. We will also narrow this report down to a specific year and we will sub-summarize by the quarter.

- 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.

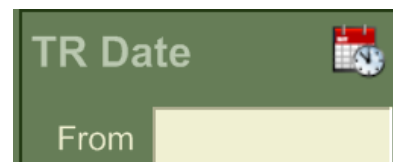


- On the **TR** tab, we will click the “TR Type” of “CL”. This will give us the charge lines when we run the query.



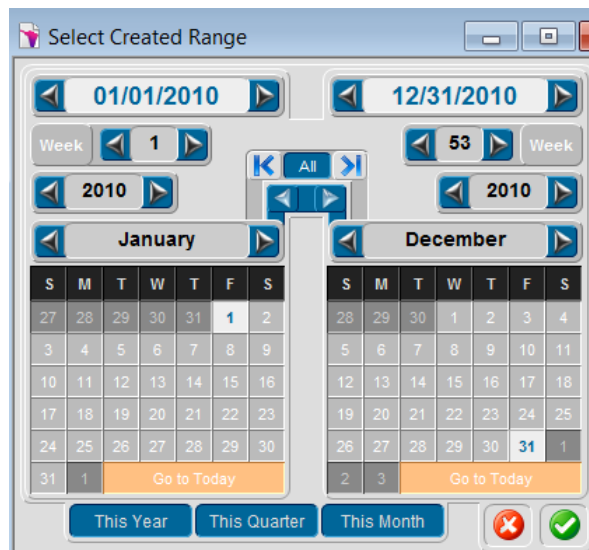
- We want only the charge lines for 2010, so we will narrow our search down to the 2010 calendar year.

Click on the Calendar icon to set the “TR Date” range.



- Select “This Year” to get the current calendar year. Then click the left arrow on the Year button on the From and To dates to change the year. Also, be sure to click on a Day on each calendar to set the new date, shown at the top. Click the green check to complete your selection.

Reports – Charges by Provider



- We have loaded the date range and the type of transaction, charge line, into one query.


Now we can run the query by clicking the blue down arrow to the right.



- You will see a count of charge lines that are shown within this set. You will notice that there are some that don't have a patient name on the left. That is because these charge lines are Client Bill charges lines. There is no patient attached to them.

Reports – Charges by Provider

TR Date	TR ID	Claim #	Patient ID	OPEN	PROC	VER	TR Type	Description	
Cassidy, S.	01/07/2010	TRA764	CLA35	PAA1	Y		CL	Transaction Level Charge 88305 Level IV - TISSUE EXAM BY	
Fudd, E.	03/21/2010	TRA1169	CLA42	PAA8	Y	Y	CL	Transaction Level Charge 10081 DRAINAGE OF PILONIDAL CYST	
Fudd, E.	03/21/2010	TRA1170	CLA42	PAA8	Y	Y	CL	Transaction Level Charge 11041 DEBRIDE SKIN, FULL	
Smart, M.	03/24/2010	TRA1194	CLA43	PAA14	Y	Y	CL	Transaction Level Charge 99242 OFFICE CONSULTATION	
Munster, H.	04/06/2010	TRA1238	CLA44	PAA15	Y	Y	N	CL	Transaction Level Charge 88305 Level IV - TISSUE EXAM BY
Anderson, S.	04/06/2010	TRA1239	CLA45	PAA17	Y	Y	Y	CL	Transaction Level Charge 15780 ABRASION TREATMENT OF SKIN
	07/03/2010	TRA1350	CLA181		Y	N		CL	Transaction Level Charge 87454 , Kelly Landers Acn# 87878744
Cassidy, S.	08/07/2010	TRA1353	CLA17	PAA1	Y	Y	CL	Transaction Level Charge 99999	
Cassidy, S.	01/07/2010	TRA1359	CLA35	PAA1	Y		CL	Transaction Level Charge 99999	
Cassidy, S.	01/07/2010	TRA1369	CLA35	PAA1	Y		CL	Transaction Level Charge 22222	
Jones, M.	03/30/2010	TRA1370	CLA48	PAA10	Y	Y	CL	Transaction Level Charge 99212 OFFICE/OUTPATIENT VISIT, EST	
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
Cassidy, S.	06/22/2010	TRA1389	CLA52	PAA1	Y	N	Y	CL	Transaction Level Charge 99212 OFFICE/OUTPATIENT VISIT, EST
Cassidy, S.	06/22/2010	TRA1390	CLA52	PAA1	Y	N	Y	CL	Transaction Level Charge 97014 Electrical Muscle Stimulation
Cassidy, S.	06/22/2010	TRA1391	CLA52	PAA1	Y	N	Y	CL	Transaction Level Charge 97010
	07/09/2010	TRA1403	CLA181		Y	N		CL	Transaction Level Charge 11922 CORRECT SKIN COLOR DEFECTS,

- The next step is to set up the reporting. Go to the **RPT** tab, or click the report button in the upper right corner. 
- The **RPT** tab allows us to set up the sorting and summary options. Which fields you select first will determine how the summary break down occurs in the report. First, click the green arrow next to “Quarter” to select. Then, select the “Rendering Provider”. Click the green check to load these selections as summary sections in the report.

Reports – Charges by Provider

Select Sort Criteria

Sort & Summarize

- 1 Quarter
- 2 Rendering Provider
- 3
- 4
- 5
- 6
- 7
- 8

Sort Only

- 1
- 2

Transaction

Year

Quarter

Month

Week

Date

Day

Group

Facility

Carrier

Rendering Provider

Patient

Insured

Claim

Category

Procedure

Transaction Type

Payment Method

Payment From

Payment Type

Transaction ID

Amount

Balance

Batch

Deposit

Created by

Modified by

Payment Origination

Batch Status

Deposit Status

Balance Responsible

Taxable

Date Created

Date Modified

Pricing Category

Error Count

Referral

Referral Source

Billing Account

Claim Type

Assisting

Reference Number

Reason Group

Reason Code

Actual Payment ID

Actual Payment Date

Referring Provider

- Choose the desired layout that you wish to use for this report. In this case, we will select the “Charge” report.

Report Title

Format

Transaction

Charge L

Payment P

Adjustment P

Line Payment P

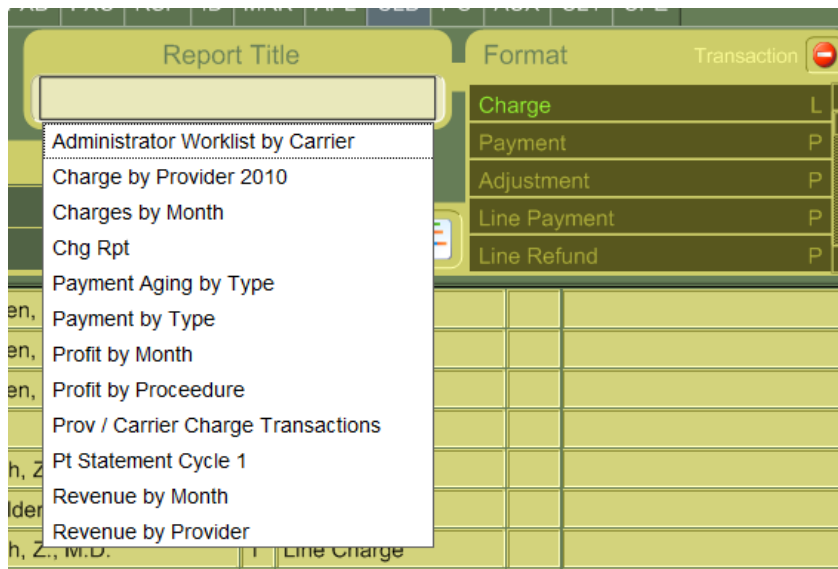
Line Refund P

Sort Only

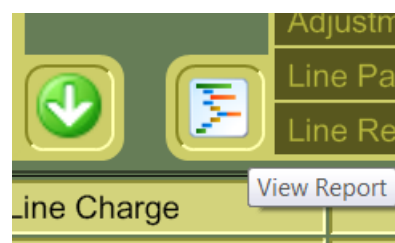
- 1
- 2

- We can name this report, or select names that are already listed. This field will appear as the title in the report. In this case, we select “Charge by Provider 2010”.

Reports – Charges by Provider



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



In this example, each quarter has a breakdown of the charge lines by rendering provider.

Charge by Provider 2010													
TR Date	Balance Asgmt (1, 2, 3, P)	Qty	Tax Amount	Line Charge	Adjustment	Patient Resp.	INS Payment	PT Payment	Line Balance				
Item Description													
03/21/2010	I 10081 DRAINAGE OF PILONIDAL CYST	1		400.00					400.00				
03/21/2010	I 11041 DEBRIDE SKIN, FULL	1		100.00					100.00				
01/07/2010	I 99999	1		100.00					100.00				
01/07/2010	I 22222	1		50.00					50.00				
Obrien, Sharon, PT		5		750.00				20.00	730.00				
03/30/2010	I 99212 OFFICE-OUTPATIENT VISIT, EST	1		45.00					45.00				
02/02/2010	P 88305 Level IV - TISSUE EXAM BY PATHOLOGIST	2		302.00	237.00		65.00		0.00				
03/03/2010	P 88305 Level IV - TISSUE EXAM BY PATHOLOGIST	2		302.00	20.00		90.00	192.00	0.00				
Smart, George Charles, Jr., Captain, MD		5		649.00	257.00		155.00	192.00	45.00				
2010 Quarter I		11		1,549.00	257.00		155.00	212.00	925.00				
04/06/2010	P 15780 ABRASION TREATMENT OF SKIN	1		50.00					50.00				
04/06/2010	P ACME Magic Elixir	1		50.00	10.00			40.00	0.00				
04/06/2010	P Fountain of Youth Pill	1		50.00				50.00	0.00				
04/06/2010	P 97530 Exercise Demonstration	1		50.00					50.00				
Maulder, Kevin L., MD		4		200.00	10.00			140.00	50.00				
06/07/2010	I 99999	1		80.00					80.00				
06/07/2010	I 99212 OFFICE-OUTPATIENT VISIT, EST	1		45.00					45.00				