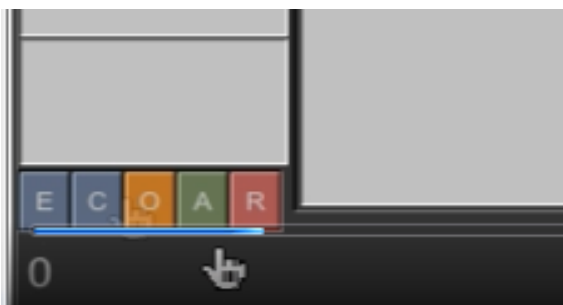




### Saving Queries

In this section we look at a few more advanced query techniques. We begin by going to the **Reports** menu and selecting the **Transaction Query**. A few functions that need to be explained are the “**E**”, “**C**”, “**O**”, “**A**” and “**R**” functions at the bottom left of your screen. These buttons will be present in all of the queries.



The “**E**” represents “Extend”, which will display additional transactions which match the criteria within the query, without removing any of the current found set.

The “**C**” button is to “Constrain” the query and will narrow down the current found set to records which also match the new criteria in the query.

The “**O**” will omit, or hide the current found set and display all of the records which were previously hidden.

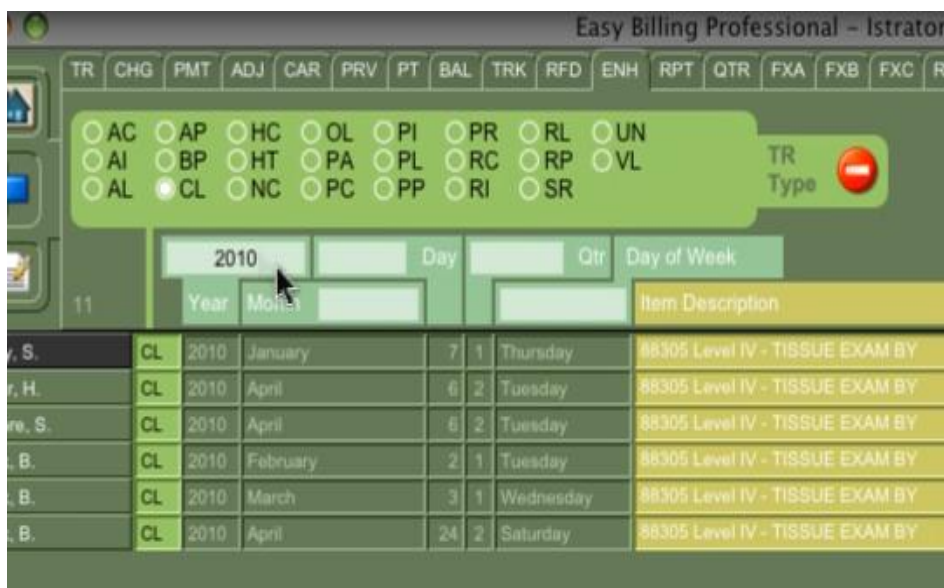
The “**A**” will display all of the records in the current transaction table.

The “**R**” is a reset. The reset will not remove the found set. However, it will clear all of the data in the query.

Note: All queries can be saved, which will also save all of your report data, including data that you would select in the sub summary and your report title and format. However, only a single query action can be saved with a query. Any additional Extends, or Constrains will not be saved with the query.

For example, if you wish to find charge lines within the year 2010, this would be an example of one query action. You can add as many options to this single query as you like. For instance, if you were only interested in 88305's within that range, you can narrow down this search without doing the Constrain.

## Reports – Saving Queries



We are limiting the search to find only 3 matching criteria: charge lines, represented by “CL”, CPT codes of 88305 and the year 2010. This example is considered one query action.

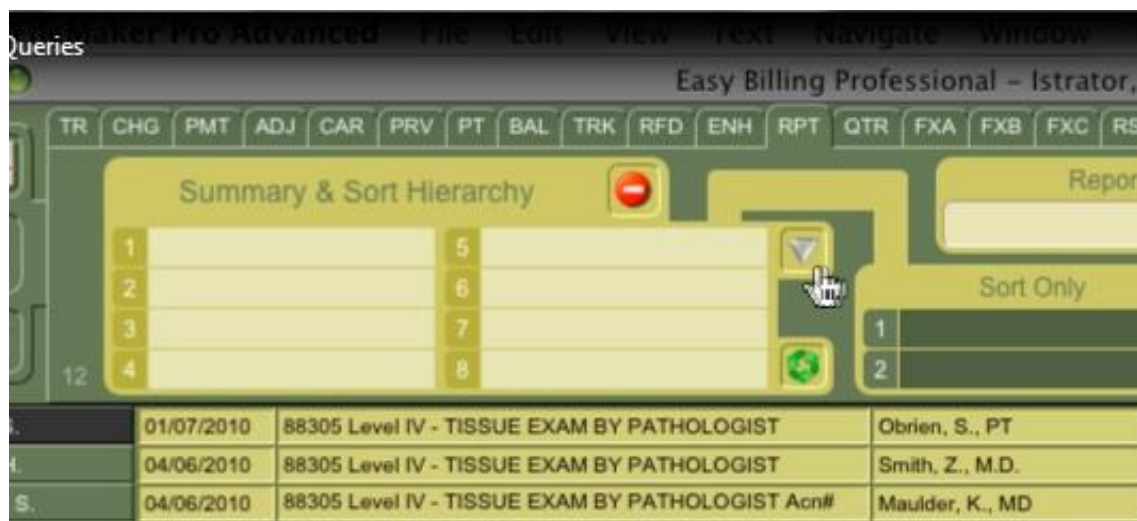
Now we can save this query by clicking on the save button, which is the green disk icon in the upper right corner of your screen.



If we want to create a report, we can do that on the **RPT** tab. Let's say we want to see this report broken down by month. Click on the down arrow on the “Summary & Sort

## Reports – Saving Queries

Hierarchy”. Select “Month” by clicking the green arrow next to it. Click the green check mark to save your selection.



If we were going to look at the Charge report, we would select “Charge” as our format and we might title the report “CHG RPT”.

## Reports – Saving Queries

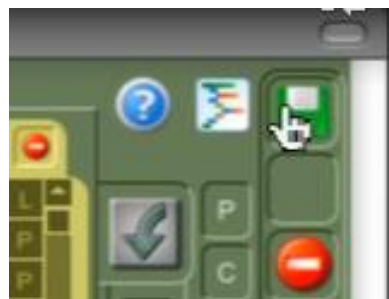


When we run the report, it will show us a report of charges broken down by the month.

The screenshot shows the 'Easy Billing Professional - Istrator, Admin' interface with the 'Chg Rpt' report displayed. The report is a table with columns: TR Date, Balance Asgmt (1, 2, 3, P), Item Description, Qty, Tax Amount, Line Charge, Adjustment, Patient Resp., INS Payment, PT Payment, and Line Balance. The data is grouped by month from January to April 2010. A mouse cursor is pointing at the 'February | 2010' row.

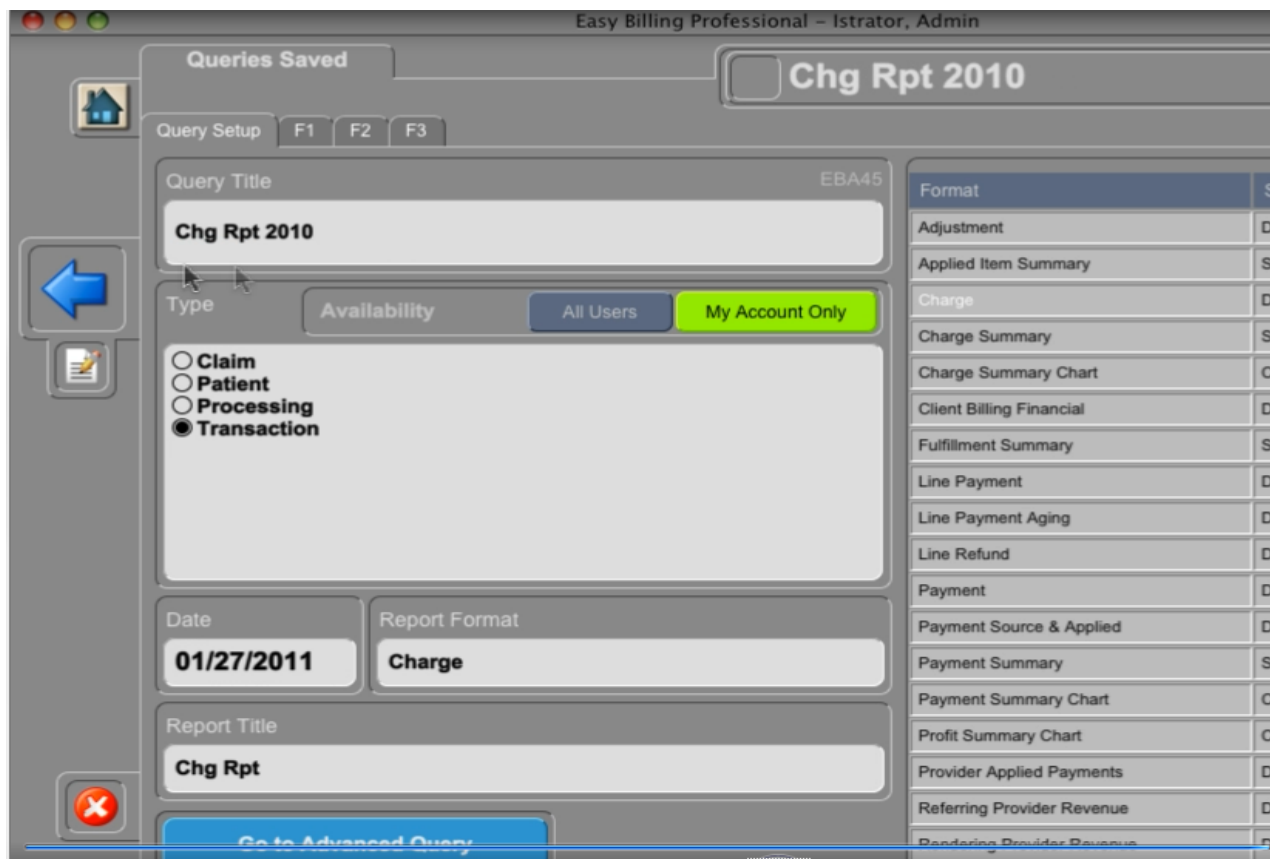
TR Date	Balance Asgmt (1, 2, 3, P)	Item Description	Qty	Tax Amount	Line Charge	Adjustment	Patient Resp.	INS Payment	PT Payment	Line Balance
01/07/2010	1	8000 Level IV - TISSUE EXAM BY PATHOLOGIST	1		100.00				20.00	80.00
<b>January   2010</b>			<b>1</b>		<b>100.00</b>				<b>20.00</b>	<b>80.00</b>
02/02/2010	P	8000 Level IV - TISSUE EXAM BY PATHOLOGIST	2		302.00	237.00		65.00		0.00
<b>February   2010</b>			<b>2</b>		<b>302.00</b>	<b>237.00</b>		<b>65.00</b>		<b>0.00</b>
03/03/2010	P	8000 Level IV - TISSUE EXAM BY PATHOLOGIST	2		302.00	20.00		90.00	192.00	0.00
<b>March   2010</b>			<b>2</b>		<b>302.00</b>	<b>20.00</b>		<b>90.00</b>	<b>192.00</b>	<b>0.00</b>
04/06/2010	1	8000 Level IV - TISSUE EXAM BY PATHOLOGIST	1		45.00					45.00
04/06/2010	P	8000 Level IV - TISSUE EXAM BY PATHOLOGIST Acct ACCH	1		155.00					155.00
04/24/2010	1	8000 Level IV - TISSUE EXAM BY PATHOLOGIST	1		151.00					151.00
<b>April   2010</b>			<b>3</b>		<b>391.00</b>					<b>391.00</b>
<b>Grand Totals</b>			<b>8</b>		<b>1,095.00</b>	<b>257.00</b>		<b>155.00</b>	<b>212.00</b>	<b>471.00</b>

We can at any point save this report as a query by clicking the green disc button.



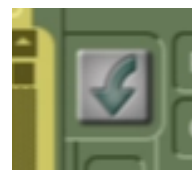
## Reports – Saving Queries

We will save this as “CHG RPT 2010.”

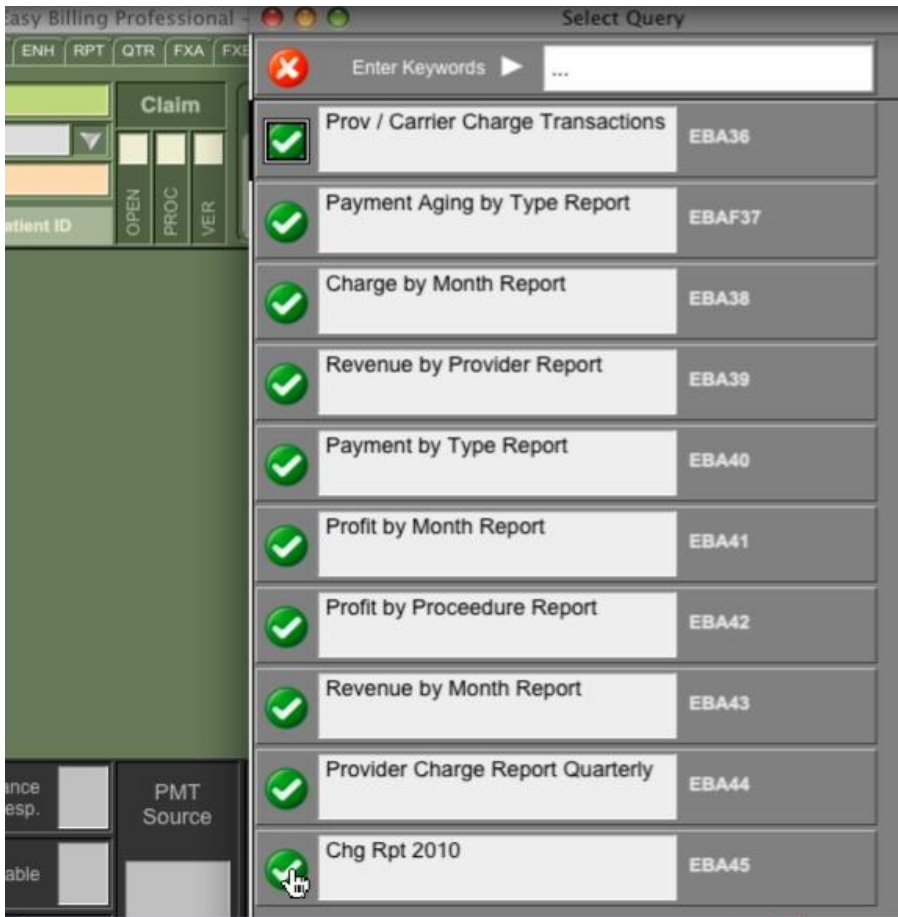


This query is now saved, including the sub summary data.

If we clear this query out and click on the query select arrow, we can search to reselect the Charge Report 2010.



## Reports – Saving Queries



As soon as we run that query, we will see all of the data that was set, including Charge Lines, calendar year of 2010, CPT code of 88305, the report criteria with Month as our sub summary and the report title and format that we had chosen.

The screenshot shows the Easy Billing Professional software interface. The 'Summary & Sort Hierarchy' section is visible, showing a table with columns for hierarchy levels and values. The 'Report Title' section shows 'Chg Rpt'. The 'Format' section shows a list of report formats. The main data table below shows a list of transactions.

Summary & Sort Hierarchy	Report Title	Format	Transaction
1 Month	Chg Rpt	Charge	L
2		Payment	P
3		Adjustment	P
4		Line Payment	P
		Line Refund	P

Transaction	Date	Description	Provider	Line Type
sidy, S.	01/07/2010	88305 Level IV - TISSUE EXAM BY PATHOLOGIST	Obrien, S., PT	1 Line Charge
ster, H.	04/06/2010	88305 Level IV - TISSUE EXAM BY PATHOLOGIST	Smith, Z., M.D.	1 Line Charge
more, S.	04/06/2010	88305 Level IV - TISSUE EXAM BY PATHOLOGIST Acn#	Maulder, K., MD	P Line Charge
max, B.	02/02/2010	88305 Level IV - TISSUE EXAM BY PATHOLOGIST	Smart, G., MD	P Line Charge
ny, B.	03/03/2010	88305 Level IV - TISSUE EXAM BY PATHOLOGIST	Smart, G., MD	P Line Charge