

# Financial Analysis Report



Type/Filters	Location - none selected Attending Provider - none selected	Location - none selected Billing Provider - none selected	Location - none selected Attending Provider - one or more selected	Location - none selected Billing Provider - one or more selected	Location - one or more selected Attending Provider - none selected	Location - one or more selected Billing Provider - none selected
<b>Charges</b>						
<b>Total Charges Billed Amount</b>	<b>Reports - Productivity</b> <i>Filters:</i> Report Type: Day Sheet Date Type: Date Posted Date - set date Provider Type: Attending provider (none selected) Group by: Content ↓ PDF: <b>Encounters - Billed Amount - Total</b>	<b>Reports - Productivity</b> <i>Filters:</i> Report Type: Day Sheet Date Type: Date Posted Date - set date Provider Type: Billing provider (none selected) Group by: Content ↓ PDF: <b>Encounters - Billed Amount - Total</b>	<b>Reports - Productivity</b> <i>Filters:</i> Report Type: Day Sheet Date Type: Date Posted Date - set date Provider Type: Attending provider Provider - select provider(s) Group by Content ↓ PDF: <b>Encounters - Billed Amount - Total</b>	<b>Reports - Productivity</b> <i>Filters:</i> Report Type: Day Sheet Date Type: Date Posted Date - set date Provider Type: Billing provider Provider - select provider(s) Group by Content ↓ PDF: <b>Encounters - Billed Amount - Total</b>	<b>Reports - Productivity</b> <i>Filters:</i> Report Type: Day Sheet Date Type: Date Posted Date - set date Provider Type: Attending provider (none selected) Location - select clinic(s) Group by Content ↓ PDF: <b>Encounters - Billed Amount - Total</b>	<b>Reports - Productivity</b> <i>Filters:</i> Report Type: Day Sheet Date Type: Date Posted Date - set date Provider Type: Billing provider (none selected) Location - select clinic(s) Group by Content ↓ PDF: <b>Encounters - Billed Amount - Total</b>
<b>Total Items Billed Amount</b>	<b>Reports - Billing</b> <i>Filters:</i> Report Type: Item Date Type: Date Entered Date Range - set date ↓ PDF: <b>Amount - Total</b>	N/A	<b>Reports - Billing</b> <i>Filters:</i> Report Type: Item Date Type: Date Entered Date Range - set date Provider - select provider(s) ↓ PDF: <b>Amount - Total</b>	N/A	<b>Reports - Billing</b> <i>Filters:</i> Report Type: Item Date Type: Date Entered Date Range - set date Location - select clinic(s) ↓ PDF: <b>Amount - Total</b>	N/A
<b>Total Balance Transfer Amount</b>	<b>Reports - Productivity</b> <i>Filters:</i> Report Type: Day Sheet Date Type: Date Posted Date - set date Provider Type: Attending provider (none selected) Group by: Content ↓ PDF: <b>Balance Transfer - Amount - Total</b>	N/A	<b>Reports - Productivity</b> <i>Filters:</i> Report Type: Day Sheet Date Type: Date Posted Date - set date Provider Type: Attending provider Provider - select provider(s) Group by Content ↓ PDF: <b>Balance Transfer - Amount - Total</b>	N/A	<b>Reports - Productivity</b> <i>Filters:</i> Report Type: Day Sheet Date Type: Date Posted Date - set date Provider Type: Attending provider (none selected) Location - select clinic(s) Group by Content ↓ PDF: <b>Balance Transfer - Amount - Total</b>	N/A
<b>Payments</b>						
<b>Total Insurance Payments Amount</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Payment: Insurance Payment Date - set date open: Insurance Payments Detail Report ↓ PDF: <b>Payment Amount - Grand Total</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Allocation Payment: Insurance Payment Provider Type: Attending provider Providers - select provider(s) Date Type: Post Date Date - set date Group By: Provider ↓ PDF: <b>Selected provider - Total Amount</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Allocation Payment: Insurance Payment Provider Type: Billing provider Providers - select provider(s) Date Type: Post Date Date - set date Group By: Provider ↓ PDF: <b>Selected provider - Total Amount</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Allocation Payment: Insurance Payment Provider Type: Attending provider Providers - select provider(s) Date Type: Post Date Date - set date Group By: Provider ↓ PDF: <b>Selected provider - Total Amount</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Allocation Payment: Insurance Payment Provider Type: Attending provider (none selected) Location - select clinic(s) Date Type: Post Date Date - set date Group By: Clinic ↓ PDF: <b>Selected clinic - Total Amount</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Allocation Payment: Insurance Payment Provider Type: Billing provider (none selected) Location - select clinic(s) Date Type: Post Date Date - set date Group By: Clinic ↓ PDF: <b>Selected clinic - Total Amount</b>
<b>Total Patient Payments Amount</b>	<b>Reports - Payments</b> <i>Filters:</i> Payment: Patient Payment Date - set date open: Patient Payments Detail Report ↓ PDF: <b>Payment Amount - Grand Total</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Allocation Payment: Patient Payment Provider Type: Attending provider Providers - select provider(s) Date Type: Post Date Date - set date Group By: Provider ↓ PDF: <b>Selected provider - Total Amount</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Allocation Payment: Patient Payment Provider Type: Billing provider Providers - select provider(s) Date Type: Post Date Date - set date Group By: Provider ↓ PDF: <b>Selected provider - Total Amount</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Allocation Payment: Patient Payment Provider Type: Attending provider Providers - select provider(s) Date Type: Post Date Date - set date Group By: Provider ↓ PDF: <b>Selected provider - Total Amount</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Allocation Payment: Patient Payment Provider Type: Attending provider (none selected) Location - select clinic(s) Date Type: Post Date Date - set date Group By: Clinic ↓ PDF: <b>Selected clinic - Total Amount</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Allocation Payment: Patient Payment Provider Type: Billing provider (none selected) Location - select clinic(s) Date Type: Post Date Date - set date Group By: Clinic ↓ PDF: <b>Selected clinic - Total Amount</b>

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Type/Filters	Location - none selected Attending Provider - none selected	Location - none selected Billing Provider - none selected	Location - none selected Attending Provider - one or more selected	Location - none selected Billing Provider - one or more selected	Location - one or more selected Attending Provider - none selected	Location - one or more selected Billing Provider - none selected
<b>Adjustments</b>						
<b>Total Insurance Adjustments Amount</b>	<b>Reports - Billing</b> Filters: Report Type: Adjustment Adjustment Type: Insurance Adjustment Provider Type: Attending Provider (none selected) Adjustment Date - set date ↓ PDF: <b>Insurance - Applied Amount</b>	<b>Reports - Billing</b> Filters: Report Type: Adjustment Adjustment Type: Insurance Adjustment Provider Type: Billing Provider (none selected) Adjustment Date - set date ↓ PDF: <b>Insurance - Applied Amount</b>	<b>Reports - Billing</b> Filters: Report Type: Adjustment Adjustment Type: Insurance Adjustment Provider Type: Attending Provider Provider - select provider(s) Adjustment Date - set date ↓ PDF: <b>Insurance - Applied Amount</b>	<b>Reports - Billing</b> Filters: Report Type: Adjustment Adjustment Type: Insurance Adjustment Provider Type: Billing Provider Provider - select provider(s) Adjustment Date - set date ↓ PDF: <b>Insurance - Applied Amount</b>	<b>Reports - Billing</b> Filters: Report Type: Adjustment Adjustment Type: Insurance Adjustment Provider Type: Attending Provider (none selected) Location Name - select clinic(s) Adjustment Date - set date ↓ PDF: <b>Insurance - Applied Amount</b>	<b>Reports - Billing</b> Filters: Report Type: Adjustment Adjustment Type: Insurance Adjustment Provider Type: Billing Provider (none selected) Location Name - select clinic(s) Adjustment Date - set date ↓ PDF: <b>Insurance - Applied Amount</b>
<b>Total Patient Adjustments Amount</b>	<b>Report - Billing</b> Filters: Report Type: Adjustment Adjustment Type: Patient Adjustment Provider Type: Attending Provider (none selected) Adjustment Date - set date open: Patient Adjustment Report ↓ PDF: <b>Total - Amount</b>	<b>Report - Billing</b> Filters: Report Type: Adjustment Adjustment Type: Patient Adjustment Provider Type: Billing Provider (none selected) Adjustment Date - set date open: Patient Adjustment Report ↓ PDF: <b>Total - Amount</b>	<b>Report - Billing</b> Filters: Report Type: Adjustment Adjustment Type: Patient Adjustment Provider Type: Attending Provider Provider - select provider(s) Adjustment Date - set date open: Patient Adjustment Report ↓ PDF: <b>Total - Amount</b>	<b>Report - Billing</b> Filters: Report Type: Adjustment Adjustment Type: Patient Adjustment Provider Type: Billing Provider Provider - select provider(s) Adjustment Date - set date open: Patient Adjustment Report ↓ PDF: <b>Total - Amount</b>	<b>Report - Billing</b> Filters: Report Type: Adjustment Adjustment Type: Patient Adjustment Provider Type: Attending Provider (none selected) Location Name - select clinic(s) Adjustment Date - set date open: Patient Adjustment Report ↓ PDF: <b>Total - Amount</b>	<b>Report - Billing</b> Filters: Report Type: Adjustment Adjustment Type: Patient Adjustment Provider Type: Billing Provider (none selected) Location Name - select clinic(s) Adjustment Date - set date open: Patient Adjustment Report ↓ PDF: <b>Total - Amount</b>
<b>Refunds</b>						
<b>Total Insurance Refunds Amount</b>	<b>Refunds - Refunds History</b> Filters: Recipient Type: Insurance Status: Issued Refund Date - set date ↓ PDF: <b>Refund Amount - Total</b>		<b>Refunds - Refunds History</b> Filters: Recipient Type: Insurance Status: Issued Provider - select provider(s) Refund Date - set date ↓ PDF: <b>Refund Amount - Total</b>		<b>Refunds - Refunds History</b> Filters: Recipient Type: Insurance Status: Issued Location - select clinic(s) Refund Date - set date ↓ PDF: <b>Refund Amount - Total</b>	
<b>Total Patient Refunds Amount</b>	<b>Refunds - Refunds History</b> Filters: Recipient Type: Patient Status: Issued Refund Date - set date ↓ PDF: <b>Refund Amount - Total</b>		<b>Refunds - Refunds History</b> Filters: Recipient Type: Patient Status: Issued Provider - select provider(s) Refund Date - set date ↓ PDF: <b>Refund Amount - Total</b>		<b>Refunds - Refunds History</b> Filters: Recipient Type: Patient Status: Issued Location - select clinic(s) Refund Date - set date ↓ PDF: <b>Refund Amount - Total</b>	
<b>Credit Transfer</b>						
<b>Total Credit Transfer Amount</b>	<b>Report - Billing</b> Filters: Report Type: Credit Transfer Post Date - set date ↓ PDF: <b>Amount - Total</b>		<b>Report - Billing</b> Filters: Report Type: Credit Transfer Provider - select provider(s) Post Date - set date ↓ PDF: <b>Amount - Total</b>		<b>Report - Billing</b> Filters: Report Type: Credit Transfer Location Name - select clinic(s) Post Date - set date ↓ PDF: <b>Amount - Total</b>	
<b>Sales Tax</b>						
<b>Total Sales Tax Amount</b>	<b>Reports - Billing</b> Filters: Report Type: Item Date Type: Date Entered Date Range - set date ↓ PDF: <b>Tax Amount - Total</b>	N/A	<b>Reports - Billing</b> Filters: Report Type: Item Date Type: Date Entered Date Range - set date Provider - select provider(s) ↓ PDF: <b>Tax Amount - Total</b>	N/A	<b>Reports - Billing</b> Filters: Report Type: Item Date Type: Date Entered Date Range - set date Location - select clinic(s) ↓ PDF: <b>Tax Amount - Total</b>	N/A

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Type/Filters	Location - none selected Attending Provider - none selected	Location - none selected Billing Provider - none selected	Location - none selected Attending Provider - one or more selected	Location - none selected Billing Provider - one or more selected	Location - one or more selected Attending Provider - none selected	Location - one or more selected Billing Provider - none selected
<b>Encounters</b>						
<b>Total Encounters Posted</b>	<b>Reports - Productivity</b> <i>Filters:</i> Report Type: Day Sheet Date Type: Date Posted Date - set date Provider Type: Attending provider (none selected) Group by: Content ↓ PDF: <b>Encounters - Total: #</b>	<b>Reports - Productivity</b> <i>Filters:</i> Report Type: Day Sheet Date Type: Date Posted Date - set date Provider Type: Billing provider (none selected) Group by: Content ↓ PDF: <b>Encounters - Total: #</b>	<b>Reports - Productivity</b> <i>Filters:</i> Report Type: Day Sheet Date Type: Date Posted Date - set date Provider Type: Attending provider Provider - select provider(s) Group by: Content ↓ PDF: <b>Encounters - Total: #</b>	<b>Reports - Productivity</b> <i>Filters:</i> Report Type: Day Sheet Date Type: Date Posted Date - set date Provider Type: Billing provider Provider - select provider(s) Group by: Content ↓ PDF: <b>Encounters - Total: #</b>	<b>Reports - Productivity</b> <i>Filters:</i> Report Type: Day Sheet Date Type: Date Posted Date - set date Provider Type: Attending provider (none selected) Location - select clinic(s) Group by: Content ↓ PDF: <b>Encounters - Total: #</b>	<b>Reports - Productivity</b> <i>Filters:</i> Report Type: Day Sheet Date Type: Date Posted Date - set date Provider Type: Billing provider (none selected) Location - select clinic(s) Group by: Content ↓ PDF: <b>Encounters - Total: #</b>
<b>Incomplete Notes</b>						
<b>Total Incomplete Notes</b>	<b>Reports - Appointments</b> <i>Filters:</i> Report Type: Appointments Appointment Date Range - set date Appointment Status: Arrived, Ready for staff, With Staff, Ready for Provider, With Provider, Ready for check out, Checked out, Pending Cosign ↓ <b>Number of entries</b> (at the bottom of the page)	N/A	<b>Reports - Appointments</b> <i>Filters:</i> Report Type: Appointments Appointment Date Range - set date Attending provider - select provider (s) Appointment Status: Arrived, Ready for staff, With Staff, Ready for Provider, With Provider, Ready for check out, Checked out, Pending Cosign ↓ <b>Number of entries</b> (at the bottom of the page)	N/A	<b>Reports - Appointments</b> <i>Filters:</i> Report Type: Appointments Appointment Date Range - set date Location - select clinic(s) Appointment Status: Arrived, Ready for staff, With Staff, Ready for Provider, With Provider, Ready for check out, Checked out, Pending Cosign ↓ <b>Number of entries</b> (at the bottom of the page)	N/A
<b>Unapplied Payments</b>						
<b>Total Unapplied Insurance Payments</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Payment: Insurance Payment Date - set date ↓ PDF: <b>Unapplied Amount</b>	N/A	N/A	N/A	N/A	N/A
<b>Total Unapplied Patient Payments</b>	<b>Reports - Payments</b> <i>Filters:</i> Payment: Patient Payment Date - set date ↓ PDF: <b>Unapplied Amount</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Allocation Payment: Patient Payment Provider Type: Attending provider Providers - select provider(s) Date Type: Post Date Date - set date Group By: Provider ↓ PDF: <b>Selected provider - Unapplied Amount</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Allocation Payment: Patient Payment Provider Type: Billing provider Providers - select provider(s) Date Type: Post Date Date - set date Group By: Provider ↓ PDF: <b>Selected provider - Unapplied Amount</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Allocation Payment: Patient Payment Provider Type: Attending provider (none selected) Location - select clinic(s) Date Type: Post Date Date - set date Group By: Clinic ↓ PDF: <b>Selected clinic - Unapplied Amount</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Allocation Payment: Patient Payment Provider Type: Billing provider (none selected) Location - select clinic(s) Date Type: Post Date Date - set date Group By: Clinic ↓ PDF: <b>Selected clinic - Unapplied Amount</b>	<b>Reports - Payments</b> <i>Filters:</i> Report Type: Payments Allocation Payment: Patient Payment Provider Type: Billing provider (none selected) Location - select clinic(s) Date Type: Post Date Date - set date Group By: Clinic ↓ PDF: <b>Selected clinic - Unapplied Amount</b>