MedSoft Reports Guide

v. 4

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MedSoft reports are divided into four categories, outlined below. User access level determines which reports each user will have access to view.

Please contact support@getcavu.com if user access needs change.

Admin Reports

Transaction Totals by Therapist

This report publishes transaction totals for all visit dates during the requested date parameters. Totals are differentiated by therapist.

Please note:

1. This report reflects Charges, Adjustments, Payments, and Balance for all dates of service within the time range requested.
2. Each therapist is listed separately on this report, with his/her own subtotals. A grand total can be found at the bottom of the report.
3. Adjustments and Payments reflected in this report are/were not necessarily collected within the same time period as the report time frame. Any adjustments/payments associated with the dates of service listed are summarized here. For example: If a patient's Date of Service was 1/1/2017, and the report is run on 3/1/17 for the time range from 1/1/17 – 1/30/17, all Adjustments and Payments that have occurred for the 1/1/17 date of service will show up, even if that payment or adjustment was added on 2/15/17.

Performance

This report details the appointments each therapist/calendar resource has had scheduled for the requested timeframe. Appointments are displayed as "Consult," "New Patient," or "Returning Patient" based upon the "Appointment Type" selected on the appointment calendar. Appointment outcome (Canceled, No Show, etc) reflects the result selected on the appointment calendar.

Please note:

1. Within each therapist's section, appointments are segmented into "New Patients" and "Returning Patients." All appointments given the "NP" patient type in the Appointment window are counted in the "New Patient" section. All other appointment types are considered "Returning Patients."
2. A designation as "Pending" means that an appointment has not yet been set on the calendar as Checked In, Canceled, No Show, etc. The "Pending Appointments" widget on the Insight Analytics page may be used in conjunction with this report to identify any Pending appointments that have passed and update them appropriately.
3. Each therapist is listed separately on this report, with his/her own subtotals. A grand total can be found at the bottom of the report.
4. **The New Patient number on this report may differ from the New Patient total on other reports. All other MedSoft reports use a specific definition of New Patients (patients who have had the "New Patient" box checked at Registration and who have also been checked in for an initial appointment), whereas this report displays "New Patient" as an appointment type selected by users at the clinic level. If an appointment type was set as "New Patient" on the calendar but the patient did not meet the MedSoft definition of a new patient, the reports will show conflicting numbers for New Patient totals.

Productivity Summary

This report shows summarized visits and charge amounts within user's requested timeframe, differentiated by therapist.

Please note:

1. If the "Billing Type Unknown" designation is showing on this report, it means that the Insurance has not been designated as either "Electronic" or "Paper." This designation can be set/updated in Admin -> Insurances.
2. Within "Electronic Billing," "unbilled visits" are those that have not been sent electronically yet.
3. The "Paper Billing" designation is an umbrella designation for both paper-billed insurances and cash-paying patients.

Productivity Detail

This report shows detailed visits and charge amounts within user's designated timeframe, differentiated by therapist. This report may be used to identify the details of any area of question/concern from the Productivity Summary report.

Please note:

1. This report utilizes filters. Users should select the appropriate Report Details they would like to view on the "Report Details" window that pops up before running the report to ensure accuracy.
2. Paper billing will update to "yes" on this report once a HCFA is printed.

Referrals by Doctor

This report details which patients have been referred by Referring Physicians in the requested timeframe. The patient's first scheduled appointment (regardless of check-in status) is the driving date on this report.

Please note:

1. This report sorts by Referring Vendor (alphabetically, by last name).
2. The "First Scheduled Appt" is the date of the patient's first scheduled visit in MedSoft. This is the driving date on this report. **Example: If a patient was registered on 3/30/17, but his/her first appointment was not until 4/4/17, the patient will show up on an April report, but not a March report.
3. "Referral Source" is pulled from New Patient Registration, and can be used to assist with or track clinic marketing efforts.
4. Patients will not show up on this report if the "Not Referred" box was checked at Patient Registration, or has been checked in the Patient Center. Patients who do not have the "Not

Referred" box checked, but who have no Referring Vendor entered in MedSoft, will be listed at the top of the report, as they have no affiliation with any listed doctor.

5. For clinic users who need to see a total number of all patients referred by a specific Referring Vendor, the recommended Best Practice is to look up that Vendor under Admin -> Vendors, then click on the "Referrals" tab. This will list all patients referred by that Vendor.

Referrals by Insurance

This report details which patients have been referred by Referring Vendors in the requested time period, and sorts those results by Insurance.

Please note:

1. This report sorts by Insurance Provider (alphabetically, by Insurance name).
2. Patients with no Insurance are listed at the top of the report, as they have no affiliation with any listed Insurance.
3. The "Added Date" is the date when a patient was registered in MedSoft. This is the driving date on this report.
4. "Referral Source" is pulled from New Patient Registration, and can be used to assist with or track clinic marketing efforts.

New Registrations Per Month

This report details how many patients each physician referred during the requested months. This data is based on the number of registrations pending or completed with that physician's name in the Referring Physician box at the time of registration.
*Please note that new patients will only show up on this report if the "New Patient" box was checked at registration. This box was created 1/1/2017; for report data prior to that date, please email support@getcavu.com with your Report Request.

1. This report will always show all 12 months of the year. However, only the month(s) requested in the user's designated time period will load data. *Ex: clinic may have data for 12 months; however, if user enters only Sept - Dec on the date range for the report, only these months will load with data. Columns for Jan - Aug will show as "0."*
2. Names in the first column are Referring vendors, sorted alphabetically by first name.
3. To be counted on this report, a patient must have had a checked-in appointment that was designated as a "New Patient (NP)" type.

New Patients

This report details all patients who had their first checked-in appointment during the requested date range. New Patients who have not been checked-in will not appear on this report.

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Please note:

4. This report shows Name, Account Number, Referring Vendor, and First Visit Date of all New Patients within the requested time frame.
5. MedSoft's definition of a New Patient is a Patient who:
    a. Had the "New Patient" box checked at Patient Registration AND
    b. Has had at least one checked-in appointment
6. **Patients will only show up on this report if the "New Patient" box was checked at Registration. This box was created 1/1/2017; for report data prior to that date, please email support@getcavu.com with your Report request.

Patient By Status

This report allows clinic users to run a list of all patients by patient status.

Please note:

1. This report opens in Excel.
2. This report details patient name, patient account number, email address, and patient status code.

No Show/Canceled Report

This report allows clinic users to run a list of all patients who have been updated to No Show or Canceled Appointment status for the requested timeframe.

Please note:

1. This report opens in Excel.
2. This report details patient name, patient account number, visit date, appointment status, No Show/Canceled Reason, and any corresponding Notes.

Monthly Comparison Report

This report shows users a clinic-level view of various data points for tracking purposes.

Please note:

1. The data points on this report are as follows:

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a. Total Billed – this is the total amount billed out by the clinic each month. This total will include not only Therapist Charges (as seen on the Transaction Totals by Therapist report), but also any additional charges, including Undocumented Visits (such as Supply charges, No Show charges, etc).

b. Total Collected – this column shows the total amount of money the clinic has collected (within the requested timeframe) that has also been applied. When viewed in comparison to the Payments Received report, this column may not match the Payments Received total until all payments have been applied.

c. Total Visits – this is the total number of visits the clinic saw within the given month. This number should reflect the total of all visits by all therapists shown on the Performance Report.

d. Checked In – this is the total number of visits that were checked in at the clinic within the given month. This number should reflect the total of all checked in visits by all therapists shown on the Performance Report.

e. Canceled (C) - this is the total number of visits that were Canceled (with Charge) at the clinic within the given month. This number should reflect the total of all Canceled (with Charge) visits by all therapists shown on the Performance Report.

f. Canceled (NC) - this is the total number of visits that were Canceled (with No Charge) at the clinic within the given month. This number should reflect the total of all Canceled (with No Charge) visits by all therapists shown on the Performance Report.

g. No Show (C) - this is the total number of visits that were No Show (with Charge) at the clinic within the given month. This number should reflect the total of all No Show (with Charge) visits by all therapists shown on the Performance Report.

h. No Show (NC) - this is the total number of visits that were No Show (with No Charge) at the clinic within the given month. This number should reflect the total of all No Show (with No Charge) visits by all therapists shown on the Productivity Report.

i. Pending - this is the total number of visits that are still Pending at the clinic within the given month. This number should reflect the total of all Pending visits by all therapists shown on the Performance Report.

j. New Patients – this is the total number of visits that were scheduled as "New Patient" type at the clinic within the given month. This number should reflect the total of all New Patient visits by all therapists shown on the Performance Report.

2. For purposes of this report, a "New Patient" must have had the "New Patient" box checked at Registration, and also have had a checked-in appointment within the month requested.

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Billing Reports

Aging Summary

This report summarizes all aging for the clinic.

Please note:

1. Users can filter this report by a specific date range, as well as two different parameters:
    a. All/Cash/Non-Cash
    b. All/Patient Responsibility Only/Insurance Responsibility Only
2. This report is ordered by Insurance, and shows each Date of Service as a whole, rather than at the line level.
3. This report currently only considers Primary Insurance for each patient; an aging balance on this report could be billed to a Secondary Insurance or may be charged to a Patient Statement.

Aging Detail

This report details all aging balances for the clinic.

Please note:

1. Users can filter this report by a specific date range, as well as two different parameters:
    a. All/Cash/Non-Cash
    b. All/Patient Responsibility Only/Insurance Responsibility Only
2. This report is ordered by Patient (alphabetically, by first name), and shows all details at the line level.
3. This report currently only considers Primary Insurance for each patient; an aging balance on this report *could* be billed to a Secondary Insurance or may be charged to a Patient Statement.

Productivity Detail

This report shows detailed visits and charge amounts within user's designated timeframe, differentiated by therapist. This report may be used to identify the details of any area of question/concern from the Productivity Summary report.

Please note:

1. This report utilizes filters. Users should select the appropriate Report Details they would like to view on the "Report Details" window that pops up before running the report to ensure accuracy.
2. Paper billing will update to "yes" on this report once a HCFA is printed.

Financial Reports

Payments Received

This report shows a summary of all payments posted within user's requested timeframe.
This summary includes all payments from both insurances and/or patients.

Please note:

1. This report sums all insurance payments by Insurance Provider. While many payments from the same insurance may have been entered during the requested timeframe, this report will summarize them.
2. This report sums all patient payments by payment type.

Payments Received Detail

This report shows a detailed view of all payments posted within user's requested timeframe.

Please note:

1. This report is sorted by payment date.
2. Payment designation as Insurance or Patient is designated in the second and third columns, with details on either Insurance name or Patient name.
3. This report currently shows both the payment amount and the unapplied amount of that payment. Adjustments are not reflected.
4. This report may also be opened in Excel for ease of use.

Front Office Reports

Productivity Detail

This report shows detailed visits and charge amounts within user's designated timeframe, differentiated by therapist. This report may be used to identify the details of any area of question/concern from the Productivity Summary report.

Please note:

1. This report utilizes filters. Users should select the appropriate Report Details they would like to view on the "Report Details" window that pops up before running the report to ensure accuracy.
2. Paper billing will update to "yes" on this report once a HCFA is printed.

No Show/Canceled Report

This report allows clinic users to run a list of all patients who have been updated to No Show or Canceled Appointment status for the requested timeframe.

Please note:

1. This report opens in Excel.
2. This report details patient name, patient account number, visit date, appointment status, No Show/Canceled Reason, and any corresponding Notes.