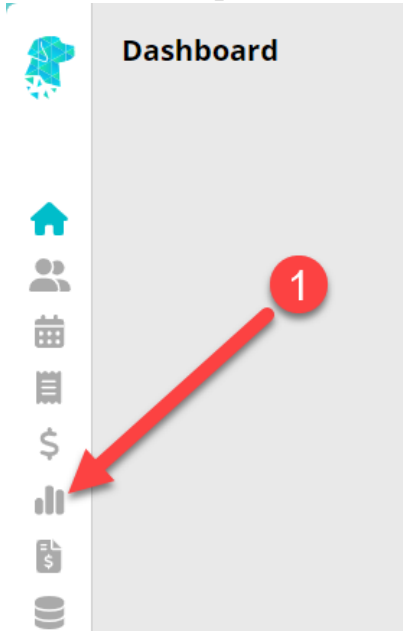


# Invoice Export Report

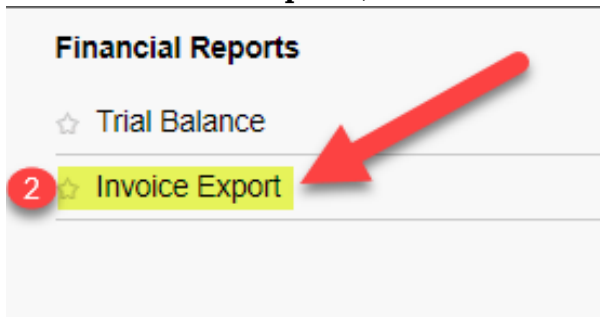
This report enables an Excel spreadsheet to be created of all invoice data for a selected date range.

## How to Export the Invoice Export Report:

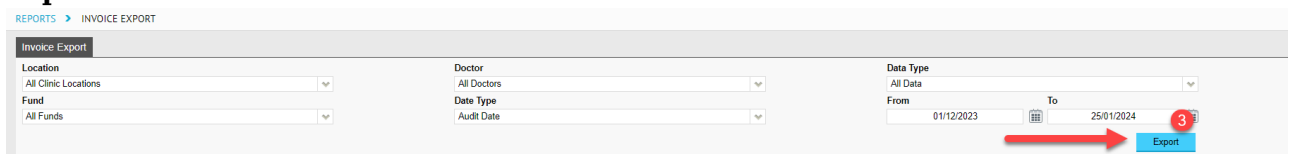
1. Click on the **Reports Icon**



2. Under **Financial Reports**, Click on **Invoice Stats**



3. Change filters as required, or if you are wanting All Invoice Data for a specific date range, leave filters as the default filter options > Add the required **To** and **From Date Range** > Click **Export**



4. Report will be **Exported** as an **Excel-Raw** file.

By default, most computers will store downloads to your **Downloads** folder on your computer, or wherever you have set your browser to store your downloads on your computer.

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## Payments Report (Clinic)

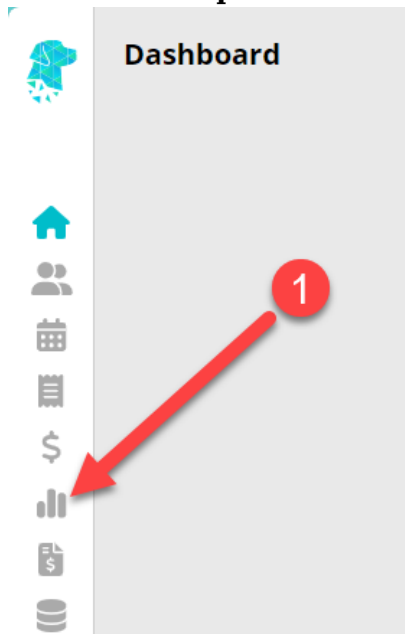
This report gives a list of all payments received in the selected date period either by Accounting Period, Audit Date or Date of Service. The data is able to be shown in formats such as Detailed, Summary and Summary Categories.

Filter options include:

- Location
- Department
- Doctor
- Payment Type
- Group By options
- From and To Date Range

### **How to Print/Export the Payments Report:**

1. Click on the **Reports Icon**



2. Under **Reports - Clinic**, Click on **Payments**

Reports - Clinic

Financial Reports

☆ Adjustments

☆ Arrears

☆ Deleted Transactions

☆ GST

☆ Invoice Stats

☆ Items

2 ☆ Payments

☆ Received

☆ Revenue

☆ Statements

☆ Transactions

3. Change filters as required > Click **Update**

REPORTS > PAYMENTS (CLINIC)

Payments (Clinic)

Location

All Locations

Department

All Departments

Doctor

All Doctors

☐ Include Inactive Doctors

Payment Type

All Payment Types

Group By (Primary)

Payment Type

Group By (Secondary)

No Group

Report Type

Detail

Date Type

Accounting Period

From

25/01/2024

To

25/01/2024

☐ Run report for each Department
   
☐ Run report for each Doctor

3 Update

4. Report will generate below the filters section.

To **Print** the report, Click the **Print** button.

To **Export** the report, Click the **Export To** button and choose either **Excel**, **Excel - Raw Data** or **PDF**.

REPORTS > PAYMENTS (CLINIC)

Payments (Clinic)

Location

All Locations

Department

All Departments

Doctor

All Doctors

☐ Include Inactive Doctors

Payment Type

All Payment Types

Group By (Primary)

Payment Type

Group By (Secondary)

No Group

Report Type

Detail

Date Type

Accounting Period

From

01/12/2023

To

31/12/2023

☐ Run report for each Department
   
☐ Run report for each Doctor

Update

1 of 1

100%

Find | Next

Clinic Tour

Payments (Clinic) Report based on Accounting Period for 01/12/2023 to 31/12/2023

All Locations

Patient Name	MRN	Inv	Tran Date	Drawer	Chq Ref	Bank	Branch	Amount	Audit Date
EFTPOS									
JONES, Sandra	109	80	01/12/2023	JONES, Sandra	REFUND			-100.00	01/12/2023
Sub Total								-100.00	
Total								-100.00	
Refund									
JONES, Sandra	109	79	01/12/2023	JONES, Sandra				100.00	01/12/2023
TESTER, Test	101	12	04/12/2023	TESTER, Test				-500.00	04/12/2023
TESTER, Test	101	34	04/12/2023	TESTER, Test				-100.00	04/12/2023
Sub Total								-500.00	
Total								-500.00	
Full Total								-600.00	

PaymentsClinic-ClinicTour

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Print

Export To

Excel

Excel - Raw data

PDF

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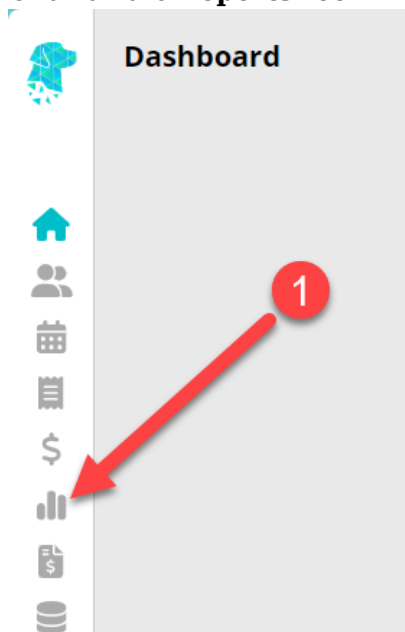
# Patient Stats Report

The **Patient Stats Report** gives the ability to obtain extensive patient demographics data.

- Medicare Patients
- Deceased Patients
- Archived Patients
- DVA Patients
- Indigenous Status
- Referral Expired
- Preferred Doctor
- Health Fund
- Gender
- Surveys
- Ability to stipulate Birth date range
- Ability to stipulate Created range
- Ability to stipulate Postcode range
- Community Nursing Cycle
- Ability to stipulate Billed range
- Doctor

## How to Print/Export the Patient Stats Report:

1. Click on the **Reports Icon**



2. Under **Patient Reports**, Click on **Patients Stats**

REPORTS

Reports

Patient Reports

☆ End of Day Banking

☆ Patient Stats

☆ Possible Double Patients

☆ Recalls

3. Change filters as required, or if you are wanting All Patient Demographics, leave filters as the default filter options > Click **Update**

REPORTS > PATIENT STATS

Patient Stats

Medicare Number  
All Patients

Deceased  
All Patients

Archived  
All Patients

DVA Number  
All Patients

Indigenous  
All Indigenous

Referral Expired  
All Patients

Preferred Doctor  
All Doctors

Health Fund  
All Funds

Sex  
All Sexes

Gender  
All Genders

Survey  
All Surveys

Sort By  
Surname

Born From To

Created From To

Postcode From To

Start Of Cycle From To

Patient Billed From To

Doctor

Update

4. Report will generate below the filters section.
- To **Print** the report, Click the **Print** button.
- To **Export** the report, Click the **Export To** button and choose either **Excel** or **PDF**.

Patient Stats

Medicare Number  
All Patients

Deceased  
All Patients

Archived  
All Patients

DVA Number  
All Patients

Indigenous  
All Indigenous

Referral Expired  
All Patients

Preferred Doctor  
All Doctors

Health Fund  
All Funds

Sex  
All Sexes

Gender  
All Genders

Survey  
All Surveys

Sort By  
Surname

Born From To

Created From To

Postcode From To

Start Of Cycle From To

Patient Billed From To

Doctor

Update

1 of 1

Find | Next

Clinic Tour

Patient Stats Report

Sort By = Surname

MRN	Name	Date of Birth	Sex	Medicare #	Mobile	Home	File #
113	ALTURA, Test	01/01/1980 (44)	-	-	-	-	-
110	BROOKS, Bob	21/06/1962 (61)	Male	2111-11111-1	-	-	-
108	JONES, Mary	10/02/1987 (36)	Female	2111-11111-1	0412-345-678	-	-
109	JONES, Sandra	01/02/1990 (33)	Female	2111-11111-1	0412-345-678	-	-
115	SAMS, Harold	19/06/1950 (73)	Male	-	-	-	-
106	SMITH, Test	01/01/1990 (34)	Female	2111-11111-1	0414-204-340	-	-
107	SMITH, John	01/01/2000 (24)	Male	2111-11111-1	-	-	-
101	TESTER, Test	01/01/1990 (34)	Female	2111-11111-1	-	-	-
102	TESTER, Com	31/01/1990 (33)	Male	-	-	-	-
104	TESTING, Test	01/01/1985 (39)	Female	2111-11111-1	-	02 9999 9999	-

Patients matching criteria 10

PatientStats-Clinic Tour

Page 1 of 1

Total patients in your database 10

Date: 25/01/2024 12:40 PM

Print

Export To

Excel

PDF

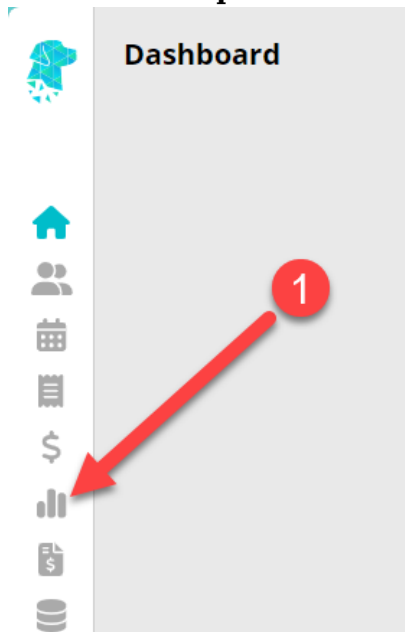
# Arrears Report (Clinic)

This shows all invoices without a zero-dollar balance. It can be run by Location, Department, Fund, Bill Type, Doctor, Period that the account has been outstanding for (*e.g. 30 days & over*). It can be run as the following Report Types:

1. **Detail** - Showing every patient and the balance
2. **Summary** - Showing each bill type and the balance
3. **Interactive** - Enabling follow up dates and notes to be accessible, to facilitate efficient workflow in debt recovery

## **How to Print/Export the Arrears Report (*Summary and Detail*):**

1. Click on the **Reports Icon**



2. Under **Reports - Clinic**, Click on **Arrears**

Reports - Clinic

Financial Reports

- Adjustments
- Arrears**
- Deleted Transactions
- GST
- Invoice Stats
- Items
- Payments
- Received
- Revenue
- Statements
- Transactions

3. Change filters as required > Click **Update**

REPORTS > ARREARS (CLINIC)

Arrears (Clinic)

Location

All Locations

Department

All Departments

Fund

All Funds

Period

All Debt

Billing Type

All Billing Type

Doctor

All Doctors

Report Types

☐ Detail
☒ Summary
☐ Interactive

As At

25/01/2024

☐ Run report for each Department
☐ Run report for each Doctor

Order by

Name

Update

4. Report will generate below the filters section.

To **Print** the report, Click the **Print** button.

To **Export** the report, Click the **Export To** button and choose either **Excel**, **Excel - Raw Data** or **PDF**.

REPORTS > ARREARS (CLINIC)

Arrears (Clinic)

Location

All Locations

Department

All Departments

Fund

All Funds

Period

All Debt

Billing Type

All Billing Type

Doctor

All Doctors

Report Types

☐ Detail
☒ Summary
☐ Interactive

As At

25/01/2024

☐ Run report for each Department
☐ Run report for each Doctor

Order by

Name

Update

1 of 1

100%

Find | Next

Clinic Tour

Arrears (Clinic) Summary as at 25/01/2024

All Locations

All Areas

ID	Name	Balance Outstanding	<15 Days	<30 Days	<45 Days	<60 Days	<90 Days	120+ Days
BUA	BUA Australia	690.75	0.00	0.00	0.00	0.00	0.00	690.75
MPL	Medicare Private Limited	435.85	0.00	0.00	0.00	0.00	0.00	435.85
MED	Medicare	142.60	0.00	0.00	0.00	0.00	142.60	0.00
PC	Patient Claims	-200.00	0.00	0.00	0.00	0.00	0.00	-200.00
PRI	Private	1,289.15	0.00	0.00	0.00	0.00	0.00	1,289.15
DVA	Veterans	9,288.69	0.00	0.00	0.00	0.00	0.00	9,288.69
Total		11,647.04	0.00	0.00	0.00	0.00	142.60	11,504.44

ArrearsClinicTour

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Print

Export To

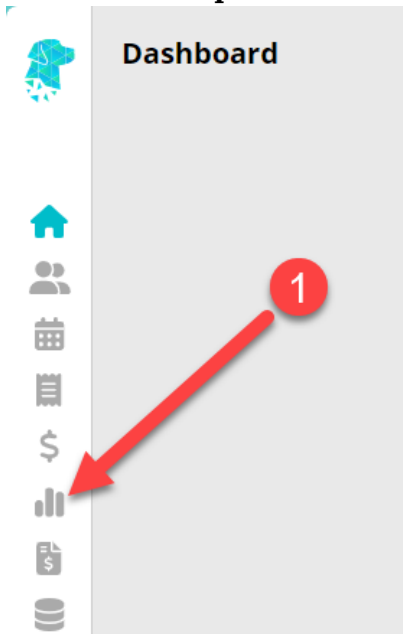
Excel

Excel - Raw data

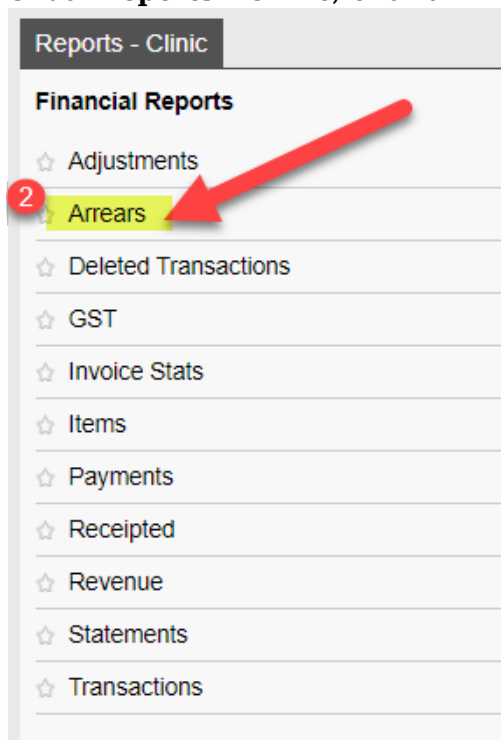
PDF

## How to Export the Arrears Report (*Interactive*):

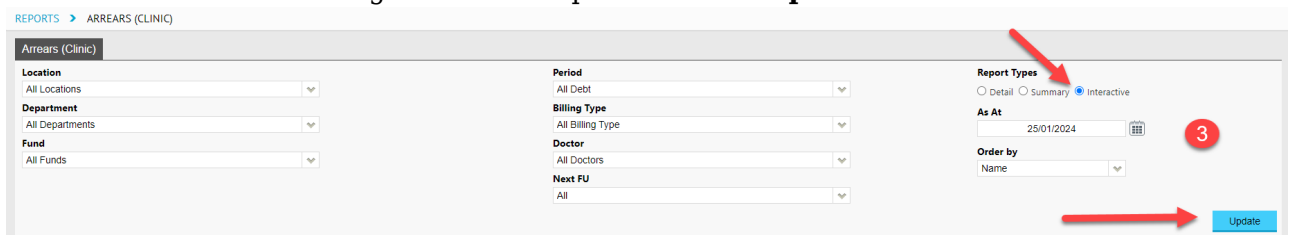
1. Click on the **Reports Icon**



2. Under **Reports - Clinic**, Click on **Arrears**



3. Select **Interactive** > Change filters as required > Click **Update**



4. Report will generate below the filters section.  
Click the **Export To** button and choose either **Excel** or **Excel - Raw Data**.



Arrears (Clinic)

**Location**  
All Locations

**Department**  
All Departments

**Fund**  
All Funds

**Period**  
All Debt

**Billing Type**  
All Billing Type

**Doctor**  
All Doctors

**Next FU**  
All

**Report Types**  
☐ Detail ☐ Summary ☒ Interactive

**As At**  
25/01/2024

**Order by**  
Name

Update

4

Export To

Excel  
Excel - Raw data

Patient Name	MRN	DOS	Doctor	Inv#	Inv Date	Balance	Bill Type	Fund	Next FU	Notes
BROOKS, Bob	110	13/11/2023	SMITH (HAPPY LAKE), John	88	13/11/2023	\$142.60	Medicare	-	-	-
BROOKS, Bob	110	08/08/2023	SMITH (HAPPY LAKE), John	68	08/08/2023	\$300.00	Private	-	20/11/2023	Called pat will pay next week
JONES, Mary	108	21/03/2023	SMITH (HAPPY LAKE), John	39	31/03/2023	\$280.25	Health Fund	Medibank	-	-
JONES, Sandra	109	02/05/2023	SMITH (HAPPY LAKE), John	52	22/05/2023	\$293.80	Health Fund	BUPA	-	-
JONES, Sandra	109	01/09/2023	SMITH (HAPPY LAKE), John	79	01/09/2023	(\$200.00)	Private	-	-	-