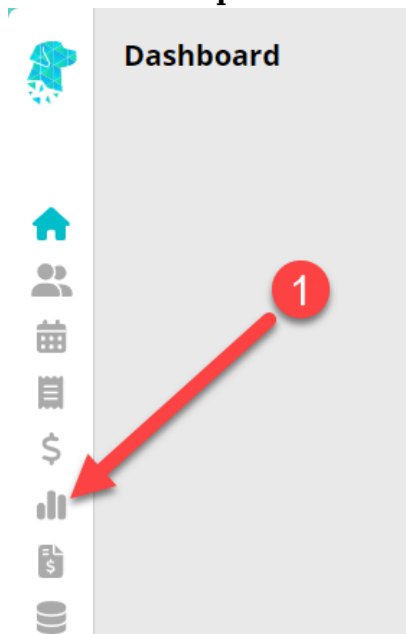


# Invoice Export Report

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)

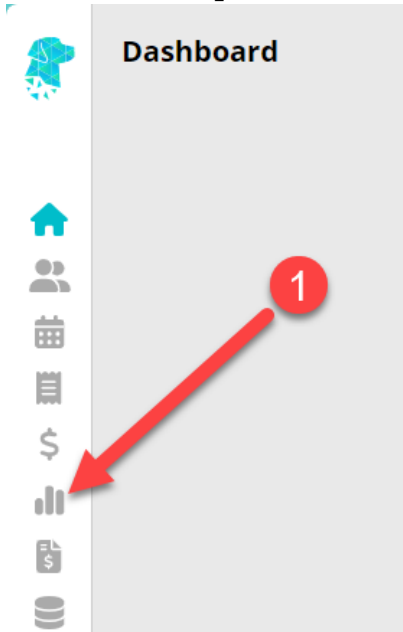
This report gives a list of all payments received in the selected date period either by Accounting Period, Audit Date or Date of Service. The data is able to be shown in formats such as Detailed, Summary and Summary Categories.

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**



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




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## Patient Stats Report

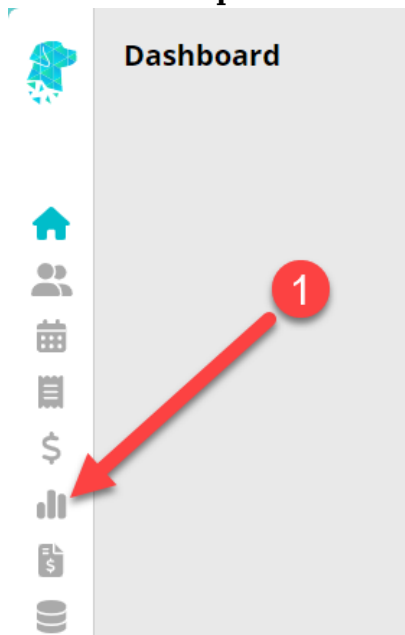
The **Patient Stats Report** gives the ability to obtain extensive patient demographics data.

- 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**



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



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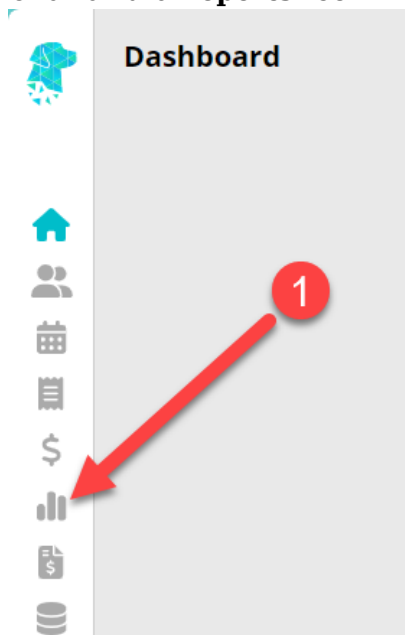
## Arrears Report (Clinic)

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**

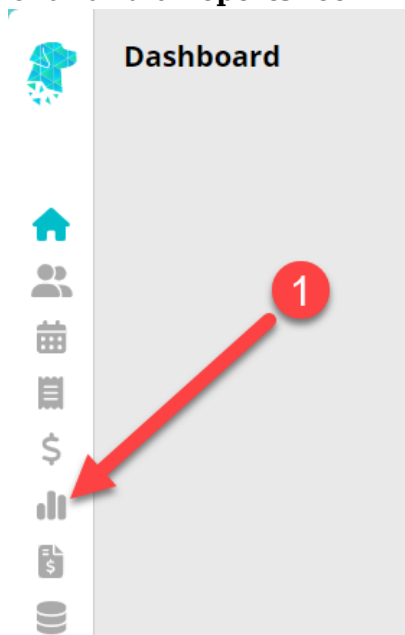


2. Under **Reports - Clinic**, Click on **Arrears**  
☐
3. Change filters as required > Click **Update**  
☐
4. Report will generate below the filters section.  
To **Print** the report, Click the **Print** button.  
To **Export** the report, Click the **Export To** button and choose either **Excel**, **Excel - Raw Data** or **PDF**.



## 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**.  
☐