

Reporting



Grant Access to Reports

1

Step 1 – Provide users with access to report

1. Main screen > **Setup** > **Users**.
2. Click **Edit user** > **Set Permissions**.
3. Section: Reports > All access > **Save**.

Setup Reports

- i. Select which reports to grant access to.
- ii. Select whether report displays all data or only own data.
- iii. Select locations to return report data against.
- iv. Apply settings to all ticked reports if desired, otherwise can configure individual settings against each report for the user



Timesaver - Use the Inherit button to copy another user's settings

Step 2 – Set individual report permissions

1. Main screen > **Setup** > **Users**.
2. Click **Edit user** > **Set Reports**.
3. Select reports and settings for access > **Save**.

2

Run Reports

Step 1 – Report Parameters

Tab	Functions
Date, Locations, Providers	Set the date range for the report, and data from which practice locations and providers to include.
Billing	Select MBS items, payment methods and billing groups.
Banking	Set the bank accounts to include.
Configuration	set reporting defaults and exclude inactive users.

Reconciling & Financial Reports

Report	Description
Daily takings report	Run before creating banking batch to reconcile.
Banking reports	Displays all banked payments.
Debtor reports	Displays all unpaid services.

Report	Description
Online Claiming (Batches)	Lists Medicare and DVA Online claiming batches regardless of payment.
Online Claiming (Paid Services)	Lists Medicare and DVA Online batches where a payment was updated during the date range.

Reports for Paying Doctors

Payment based on:	Report
Payments received for services performed	Payments – by Account (group by date)
Services performed , regardless of whether services have been paid for or not	Services – by Account (group by service created date) Work Done & Fees Taken by Provider (grouped by Service Date)

Payment based on:	Report
Payments received based on item number	Payments – by Account Type (grouped by item)
Services paid by Medicare and DVA	Online Claiming – Paid Services
Combination of services & payments	Transaction reports (grouped by service created date)

Important Reports