

Production Report and Insurance Aging Reports in Crystal PM

Production Report

1. Click Reports.
2. Select Multi Day Production from drop-down.
3. Enter desired date range
4. Click Generate Report
5. When report opens, locate description line “professional fees” and click hyperlink under the YTD Totals column.
6. Click header for “BC” or “Description” to sort list alphabetically.
7. Print or print to file as desired.

Insurance Aging Report (summary by payer name only)

1. Click Reports.
2. Select Insurance Receivables by Insurance from the drop-down.
3. Click Generate Report.
4. Print or print to file as desired