

# OfficeMate

## Production Report

Use a recent 12 month period

The screenshot shows the 'OfficeMate Custom Business Analysis Reports' window. The 'Report' section is highlighted with a yellow box and contains the following fields:

- Report Name: Monthly Production Summary
- Report Type: Production Report - Period Comparison
- Report Detail: Product Detail
- Use as Title:
- Resummarize Totals:

The 'Data Selection' section is also highlighted with a yellow box and contains:

- Transaction Dates: **SELECT SAME ONE YEAR PERIOD IN BOTH AREAS**
- Comparison Period: Year to Date
- Span: Year, 2011
- Span: YTD, 2011
- Periods: 1 / 1 / 2011 - 12/31/2011

The 'Report Options' section is highlighted with a yellow box and contains:

- Production Report Sections: **Select Gross Fees only. We do not need payment or receipt information.**
- Include Fees:  (Gross Fees, Adj., Disc & Returns, Charge Backs, Sales Taxes)
- Include Receipts:  (Patient Deposits, Insurance Deposits, Deposit Adjustments, Other Payment Methods)
- Include Applied Payments:  (Patient Payments, Insurance Payments, Charge Backs)
- Apply Adjustments and Applied Payments to Fee Slip Location:
- Show Change as Percentage:
- List by Payment Method:
- Combine Groups:

The screenshot shows the 'Products- 5 of 11' dialog box. The 'Selected' tab is highlighted with a red box and contains the following items:

- Consultations
- Contact Lens Exam Fees
- Diagnostic Services Fees
- Examination Fees
- Therapeutic Service Fee

The 'Available' tab contains the following items:

- Accessory Sales
- Contact Lens Fees
- Ophthalmic Lens Fees
- Ophthalmic Frame Fees
- Optical Service
- Shipping Fees

Below the 'Available' list, it says 'Do not include supplies'. Below the 'Selected' list, it says 'Include all medical/consult/exam/services fees'.

## Accounts Receivable Report

OfficeMate:

Reports> Reports and Statements

Monthly tab

-unselect all-

Insurance Aging Summary

In box on right-hand side, you can choose where to save or print to.

Preview

Patient and Insurance Aging Reports

Data Selection-

Minimum days outstanding, enter 0

Report Options

Balance Types- uncheck box for unapplied deposits

Process