Reports

When to Run	Report	Use for
End of day	Appointments (Grouped by User)	Checking if all appointments have an account created.
	Daily Takings Report	Reconciliation of payments received.
	Work done by provider by Date	Overview of all items billed on behalf of the doctor. - Doctors can check the list before sending Bulk Billed claim batches to Medicare
Pay providers	Services – by account Type (grouped by services created)	Paying doctors based on services billed.
	Payments – by Account Type (grouped by payment created date) including related services	Paying doctors based on payments received.
	Transaction Report (grouped by payment created date)	Paying doctors on services billed or payments received. - Consolidated information of services created and payments in the same report
Audit	Cancelled and Written off services	Verifying transactions recorded in the practice for the date range, and the reasons entered when users performed the adjustments
	Reversed payments and bounced cheques	Verifying reversed payments recorded in the practice for the date range, and the reasons entered when users performed the adjustments
	Debtors (grouped by account type) – aged by Invoice Date	Reviewing any overdue or outstanding accounts. - Can be used with the Debtor List function to generate the accounts statements.
Other Useful Reports	Appointment Statistics	Insights of appointment information along with graphs for data visualisation.
	Banking	Verifying the banking batches created.
	Online claiming	Verifying the Medicare and DVA batches created.
	Shared Health Summaries – Uploaded (by provider)	Keeping track of the Health Summaries that have been uploaded for the quarter