Using the Appointment Report

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Appointments Report

Accessing the Appointment Report

1. CR Dashboard.
2. Select **Reports** from the menu.
3. The Reports screen will display.
4. Select Appointments report from the Available Reports section.
    a. The Appointment Report will display.

The Appointments screen has the following sections:

- Available fields
- Available sub-sections (these will only display as PDF or HTML outputs)
- Report Data Range
- Filters
- Settings

Available Fields

This area will list the fields which are available in the report output. They can be selected/ deselected accordingly.

Available Sub-sections

This area will list the available sub-ections for the report:

- Allergies
- Alerts
- Notices

These can be selected / deselected depending on your requirements.

Reversing an Invoice

1. From the Patient record, select the invoice to be reversed.
2. Select the **Reverse** button (at the top of the page, under the patient banner).

Paying in Full

1. From the Patient record, select the invoice to be paid in full.
2. Select the **Pay in Full** button (at the top of the page, under the patient banner)
    a. The Payment screen will display.
3. In the Transaction section, select the **Method of payment** and amount
4. If the payment is being made by multiple methods (e.g., credit card & cash) select the **Advanced** button
    a. This allows a split payment to be entered.
5. Select **Add Transaction to Receipt**.
6. Once all payment methods are entered, select **Create Receipt** or **Receipt and Claim** button.

Paying Out Of Pocket

1. From the Patient record, select the invoice to pay out of pocket on.
2. Select the **Pay Out Of Pocket** button (at the top of the page, under the patient banner).
    a. The Payment screen will display.
3. In the Transaction section, select the **Method of payment** and amount.
4. If the payment is being made by multiple methods (e.g., credit card & cash) select the **Advanced** button.
    a. This allows a split payment to be entered.
5. Select **Add Transaction to Receipt**.
6. Once all payment methods are entered, select **Create Receipt** or **Receipt and Claim** button.

Printing an Invoice

1. From the Patient record.
2. Select **Invoices and Credits**.
3. Select the **Show** button next to the Invoice.
    a. The invoice will display.
4. Select the **Print** button (at the top of the page, under the patient banner).
    a. The Invoice will either auto print or download for printing depending on your settings.

Claim an Invoice

1. From the Patient record, select the invoice to pay out of pocket expenses on.
2. Select the **Claim** button (at the top of the page, under the patient banner).
    a. This will display the Claims screen.
3. Select **Patient Claim Interactive** button.

Printing a Receipt

1. From the Patient record.
2. Select **Invoices and Credits**.
3. Select the **Show** button next to the Receipt.
    a. The Receipt will display.
4. Select the **Print** button (at the top of the page, under the patient banner).
    a. The Receipt will either auto print or download for printing depending on your settings.