

AGING CRITERIA

- 1 ACCOUNT Balance Total
- 2 ACCOUNT Budget Amount
- 3 ACCOUNT Date of Last Insurance Payment
- 4 ACCOUNT Date of Last Personal Payment
- 5 ACCOUNT Flag, Exclude if All Flags Match
- 6 ACCOUNT Flag, Exclude if Any Flags Match
- 7 ACCOUNT Flag, Include if All Flags Match
- 8 ACCOUNT Flag, Include if Any Flags Match
- 9 ACCOUNT Select only one account
- 10 AGING Account Balance 120+ Day Category
- 11 AGING Account Balance 30 Day Category
- 12 AGING Account Balance 60 Day Category
- 13 AGING Account Balance 90 Day Category
- 14 AGING Account Balance Current Category
- 15 AGING Insurance Company
- 16 AGING Provider of Service
- 17 AGING Provider of Service (agingprovs grouping)

APPOINTMENT CRITERIA

- 1 APPOINTMENT Date of Deletion
- 2 APPOINTMENT Date of Posting
- 3 APPOINTMENT Exclude by any Previous Appt Status
- 4 APPOINTMENT Include by any Previous Appt Status
- 5 APPOINTMENT Include by Current Appt Status
- 6 APPOINTMENT Include by Day of Week
- 7 APPOINTMENT Insurance Company at Time of Appointment
- 8 APPOINTMENT Location of Appointment
- 9 APPOINTMENT Month
- 10 APPOINTMENT Provider of Appointment
- 11 APPOINTMENT Provider of Appointment (agingprovs grouping)
- 12 APPOINTMENT Reason for Visit
- 13 APPOINTMENT Time Range
- 14 CUSTODIAN Balance Total
- 15 CUSTODIAN Budget Amount
- 16 CUSTODIAN Date of Last Insurance Payment
- 17 CUSTODIAN Date of Last Personal Payment
- 18 CUSTODIAN Flag, Exclude if All Flags Match
- 19 CUSTODIAN Flag, Exclude if Any Flags Match
- 20 CUSTODIAN Flag, Include if All Flags Match
- 21 CUSTODIAN Flag, Include if Any Flags Matc
- 22 CUSTODIAN Select only one account.
- 23 GUARANTOR Balance Total
- 24 GUARANTOR Budget Amount
- 25 GUARANTOR Date of Last Insurance Payment
- 26 GUARANTOR Date of Last Personal Payment
- 27 GUARANTOR Flag, Exclude if All Flags Matc
- 28 GUARANTOR Flag, Exclude if Any Flags Matc

- 29 GUARANTOR Flag, Exclude if Any Flags Matc
- 30 GUARANTOR Flag, Exclude if Any Flags Matc
- 31 GUARANTOR Select only one account.
- 32 GUARANTOR Total Insurance Balance
- 33 GUARANTOR Total Medicaid Balance
- 34 GUARANTOR Total Personal Balance
- 35 PATIENT Date of Birth
- 36 PATIENT Date of Last Physical
- 37 PATIENT Date of Last Visit
- 38 PATIENT Date of Next Physical
- 39 PATIENT Date Patient Added to Partne
- 40 PATIENT Ethnicity
- 41 PATIENT Flag, Exclude if All Flags Match
- 42 PATIENT Flag, Exclude if Any Flags Match
- 43 PATIENT Flag, Include if All Flags Match
- 44 PATIENT Flag, Include if Any Flags Match
- 45 PATIENT Primary Care Physician
- 46 PATIENT Race
- 47 PATIENT Select only one patient.
- 48 PATIENT Sex
- 49 POLICY Subscriber Birth Date
- 50 Posted Date
- 51 Transaction Date

BILLING CRITERIA

- 1 ACCOUNT Balance Total
- 2 ACCOUNT Budget Amount
- 3 ACCOUNT Date of Last Insurance Payment
- 4 ACCOUNT Date of Last Personal Payment
- 5 ACCOUNT Flag, Exclude if All Flags Match
- 6 ACCOUNT Flag, Exclude if Any Flags Match
- 7 ACCOUNT Flag, Include if All Flags Match
- 8 ACCOUNT Flag, Include if Any Flags Match
- 9 ACCOUNT Select only one account.
- 10 ACCOUNT Total Insurance Balance
- 11 ACCOUNT Total Medicaid Balance
- 12 ACCOUNT Total Personal Balance
- 13 CHARGE Amount Charged
- 14 CHARGE Amount Due Per Charge
- 15 CHARGE Copay Amount Per Charge
- 16 CHARGE Current Billing Status
- 17 CHARGE Diagnosis
- 18 CHARGE Exclude Capitated Plans
- 19 CHARGE Include Capitated Plans
- 20 CHARGE Insko Default Copay Amount
- 21 CHARGE Number of Days since First Submission/Billing
- 22 CHARGE Number of Days since Last Submission/Billing
- 23 CHARGE Number of Days since most Current Billing Status Date

- 24 CHARGE Number of Days since Payor Responsibility
- 25 CHARGE Number of Times Submitted/Billed
- 26 CHARGE Place of Service
- 27 CHARGE Procedure
- 28 CHARGE Procedure Type of Service
- 29 CHARGE Procedure Types
- 30 CHARGE Provider of Service
- 31 CHARGE Provider of Service (agingprovs grouping)
- 32 CHARGE Responsible Party
- 33 CHARGE Transaction Month
- 34 CHARGE Type of Provider (Real, Not Real, etc..)
- 35 PATIENT Date of Birth
- 36 PATIENT Date of Last Physical
- 37 PATIENT Date of Last Visit
- 38 PATIENT Date of Next Physical
- 39 PATIENT Date Patient Added to Partner
- 40 PATIENT Ethnicity
- 41 PATIENT Flag, Exclude if All Flags Match
- 42 PATIENT Flag, Exclude if Any Flags Match
- 43 PATIENT Flag, Include if All Flags Match
- 44 PATIENT Flag, Include if Any Flags Match
- 45 PATIENT Primary Care Physician
- 46 PATIENT Race
- 47 PATIENT Select only one patient.
- 48 PATIENT Sex
- 49 Posted Date
- 50 Transaction Date

CHGS-REIMBURSEMENT

- 1 ACCOUNT Balance Total
- 2 ACCOUNT Budget Amount
- 3 ACCOUNT Date of Last Insurance Payment
- 4 ACCOUNT Date of Last Personal Payment
- 5 ACCOUNT Flag, Exclude if All Flags Match
- 6 ACCOUNT Flag, Exclude if Any Flags Match
- 7 ACCOUNT Flag, Include if All Flags Match
- 8 ACCOUNT Flag, Include if Any Flags Match
- 9 ACCOUNT Select only one account.
- 10 ACCOUNT Total Insurance Balance
- 11 ACCOUNT Total Medicaid Balance
- 12 ACCOUNT Total Personal Balance
- 13 CHARGE Age at Time of Service
- 14 CHARGE Amount Charged
- 15 CHARGE Amount Due Per Charge
- 16 CHARGE Copay Amount Per Charge
- 17 CHARGE Current Responsible Party
- 18 CHARGE Diagnoses
- 19 CHARGE Diagnoses - Include Allergy Diagnoses Only

- 20 CHARGE Diagnoses - Include Major Diagnoses Only
- 21 CHARGE Exclude Capitated Plans at Time of Service (TOS)
- 22 CHARGE Include Capitated Plans at Time of Service (TOS)
- 23 CHARGE Location of Posting
- 24 CHARGE Place of Service
- 25 CHARGE Procedure
- 26 CHARGE Procedure Type of Service
- 27 CHARGE Procedure Types
- 28 CHARGE Provider of Billing
- 29 CHARGE Provider of Service
- 30 CHARGE Provider of Service (agingprovs grouping)
- 31 CHARGE Responsible Party at Time of Service
- 32 CHARGE Responsible Party at TOS Default Copay Amount
- 33 CHARGE Responsible Party at TOS ID Number
- 34 CHARGE Transaction Month
- 35 CHARGE Type of Provider (Real, Not Real, etc..)
- 36 CHARGE User who Posted
- 37 PATIENT Date of Birth
- 38 PATIENT Date of Last Physical
- 39 PATIENT Date of Last Visit
- 40 PATIENT Date of Next Physical
- 41 PATIENT Date Patient Added to Partner
- 42 PATIENT Ethnicity
- 43 PATIENT Flag, Exclude if All Flags Match
- 44 PATIENT Flag, Exclude if Any Flags Match
- 45 PATIENT Flag, Include if All Flags Match
- 46 PATIENT Flag, Include if Any Flags Match
- 47 PATIENT Primary Care Physician
- 48 PATIENT Race
- 49 PATIENT Select only one patient.
- 50 PATIENT Sex
- 51 Transaction Date

CLAIMS SUMMARY

- 1 ACCOUNT Balance Total
- 2 ACCOUNT Budget Amount
- 3 ACCOUNT Date of Last Insurance Payment
- 4 ACCOUNT Date of Last Personal Payment
- 5 ACCOUNT Flag, Exclude if All Flags Match
- 6 ACCOUNT Flag, Exclude if Any Flags Match
- 7 ACCOUNT Flag, Include if All Flags Match
- 8 ACCOUNT Flag, Include if Any Flags Match
- 9 ACCOUNT Select only one account.
- 10 BILLING HISTORY Responsible Party
- 11 BILLING HISTORY Status/What
- 12 BILLING HISTORY User who Posted
- 13 Transaction Date

DAYSHEET

- 1 ACCOUNT Balance Total
- 2 ACCOUNT Budget Amount
- 3 ACCOUNT Date of Last Insurance Payment
- 4 ACCOUNT Date of Last Personal Payment
- 5 ACCOUNT Flag, Exclude if All Flags Match
- 6 ACCOUNT Flag, Exclude if Any Flags Match
- 7 ACCOUNT Flag, Include if All Flags Match
- 8 ACCOUNT Flag, Include if Any Flags Match
- 9 ACCOUNT Select only one account.
- 10 DAYSHEET Insurance Company at Time of Service
- 11 DAYSHEET Location of Posting
- 12 DAYSHEET Posting Month
- 13 DAYSHEET Provider for Service
- 14 DAYSHEET Provider of Service (agingprovs grouping)
- 15 DAYSHEET User
- 16 PATIENT Date of Birth
- 17 PATIENT Date of Last Physical
- 18 PATIENT Date of Last Visit
- 19 PATIENT Date of Next Physical
- 20 PATIENT Date Patient Added to Partner
- 21 PATIENT Ethnicity
- 22 PATIENT Flag, Exclude if All Flags Match
- 23 PATIENT Flag, Exclude if Any Flags Match
- 24 PATIENT Flag, Include if All Flags Match
- 25 PATIENT Flag, Include if Any Flags Match
- 26 PATIENT Primary Care Physician
- 27 PATIENT Race
- 28 PATIENT Select only one patient.
- 29 PATIENT Sex
- 30 Posted Date
- 31 Transaction Date

DEPOSIT

- 1 ACCOUNT Balance Total
- 2 ACCOUNT Budget Amount
- 3 ACCOUNT Date of Last Insurance Payment
- 4 ACCOUNT Date of Last Personal Payment
- 5 ACCOUNT Flag, Exclude if All Flags Match
- 6 ACCOUNT Flag, Exclude if Any Flags Match
- 7 ACCOUNT Flag, Include if All Flags Match
- 8 ACCOUNT Flag, Include if Any Flags Match
- 9 ACCOUNT Select only one account.
- 10 DEPOSIT Insurance Company at Time of Service
- 11 DEPOSIT Location of Posting
- 12 DEPOSIT Payment Class
- 13 DEPOSIT Payment Type
- 14 DEPOSIT Posting Month
- 15 DEPOSIT Provider for Service

- 16 DEPOSIT Provider of Service (agingprovs grouping)
- 17 DEPOSIT User
- 18 PATIENT Date of Birth
- 19 PATIENT Date of Last Physical
- 20 PATIENT Date of Last Visit
- 21 PATIENT Date of Next Physical
- 22 PATIENT Date Patient Added to Partner
- 23 PATIENT Ethnicity
- 24 PATIENT Flag, Exclude if All Flags Match
- 25 PATIENT Flag, Exclude if Any Flags Match
- 26 PATIENT Flag, Include if All Flags Match
- 27 PATIENT Flag, Include if Any Flags Match
- 28 PATIENT Primary Care Physician
- 29 PATIENT Race
- 30 PATIENT Select only one patient.
- 31 PATIENT Sex
- 32 Posted Date
- 33 Transaction Date

PATIENT-CHARGE INFORMATION

- 1 ACCOUNT Total Medicaid Balance
- 2 ACCOUNT Total Personal Balance
- 3 CHARGE Age at Time of Service
- 4 CHARGE Amount Charged
- 5 CHARGE Amount Due Per Charge
- 6 CHARGE Copay Amount Per Charge
- 7 CHARGE Current Responsible Party
- 8 CHARGE Diagnoses
- 9 CHARGE Diagnoses - Include Allergy Diagnoses Only
- 10 CHARGE Diagnoses - Include Major Diagnoses Only
- 11 CHARGE Exclude Capitated Plans at Time of Service (TOS)
- 12 CHARGE Include Capitated Plans at Time of Service (TOS)
- 13 CHARGE Location of Posting
- 14 CHARGE Place of Service
- 15 CHARGE Procedure
- 16 CHARGE Procedure Type of Service
- 17 CHARGE Procedure Types
- 18 CHARGE Provider of Billing
- 19 CHARGE Provider of Service
- 20 CHARGE Provider of Service (agingprovs grouping)
- 21 CHARGE Responsible Party at Time of Service
- 22 CHARGE Responsible Party at TOS Default Copay Amount
- 23 CHARGE Responsible Party at TOS ID Number
- 24 CHARGE Transaction Month
- 25 CHARGE Type of Provider (Real, Not Real, etc..)
- 26 CHARGE User who Posted
- 27 PATIENT Date of Birth
- 28 PATIENT Date of Last Physical

- 29 PATIENT Date of Last Visit
- 30 PATIENT Date of Next Physical
- 31 PATIENT Date Patient Added to Partner
- 32 PATIENT Ethnicity
- 33 PATIENT Flag, Exclude if All Flags Match
- 34 PATIENT Flag, Exclude if Any Flags Match
- 35 PATIENT Flag, Include if All Flags Match
- 36 PATIENT Flag, Include if Any Flags Match
- 37 PATIENT Primary Care Physician
- 38 PATIENT Race
- 39 PATIENT Select only one patient.
- 40 PATIENT Sex
- 41 Transaction Date

PATIENT DEMOGRAPHIS

- 1 CUSTODIAN Balance Total
- 2 CUSTODIAN Budget Amount
- 3 CUSTODIAN Date of Last Insurance Payment
- 4 CUSTODIAN Date of Last Personal Payment
- 5 CUSTODIAN Flag, Exclude if All Flags Match
- 6 CUSTODIAN Flag, Exclude if Any Flags Match
- 7 CUSTODIAN Flag, Include if All Flags Match
- 8 CUSTODIAN Flag, Include if Any Flags Match
- 9 CUSTODIAN Select only one account.
- 10 GUARANTOR Balance Total
- 11 GUARANTOR Budget Amount
- 12 GUARANTOR Date of Last Insurance Payment
- 13 GUARANTOR Date of Last Personal Payment
- 14 GUARANTOR Flag, Exclude if All Flags Match
- 15 GUARANTOR Flag, Exclude if Any Flags Match
- 16 GUARANTOR Flag, Include if All Flags Match
- 17 GUARANTOR Flag, Include if Any Flags Match
- 18 GUARANTOR Select only one account.
- 19 PATIENT Age as of Today
- 20 PATIENT Custodial Zip Code
- 21 PATIENT Date of Birth
- 22 PATIENT Date of Last Physical
- 23 PATIENT Date of Last Visit
- 24 PATIENT Date of Next Physical
- 25 PATIENT Date Patient Added to Partner
- 26 PATIENT Ethnicity
- 27 PATIENT Flag, Exclude if All Flags Match
- 28 PATIENT Flag, Exclude if Any Flags Match
- 29 PATIENT Flag, Include if All Flags Match
- 30 PATIENT Flag, Include if Any Flags Match
- 31 PATIENT Guarantor Zip Code
- 32 PATIENT Primary Care Physician
- 33 PATIENT Race

- 34 PATIENT Select only one patient.
- 35 PATIENT Sex
- 36 PRIMARY POLICY Insurance Company as of Today

PAYMENT REPORTS

- 1 ACCOUNT Balance Total
- 2 ACCOUNT Budget Amount
- 3 ACCOUNT Date of Last Insurance Payment
- 4 ACCOUNT Date of Last Personal Payment
- 5 ACCOUNT Flag, Exclude if All Flags Matc
- 6 ACCOUNT Flag, Exclude if Any Flags Matc
- 7 ACCOUNT Flag, Include if All Flags Matc
- 8 ACCOUNT Flag, Include if Any Flags Matc
- 9 ACCOUNT Select only one account.
- 10 ACCOUNT Total Insurance Balance
- 11 ACCOUNT Total Medicaid Balance
- 12 ACCOUNT Total Personal Balance
- 13 PATIENT Date of Birth
- 14 PATIENT Date of Last Physical
- 15 PATIENT Date of Last Visit
- 16 PATIENT Date of Next Physical
- 17 PATIENT Date Patient Added to Partner
- 18 PATIENT Ethnicity
- 19 PATIENT Flag, Exclude if All Flags Match
- 20 PATIENT Flag, Exclude if Any Flags Match
- 21 PATIENT Flag, Include if All Flags Match
- 22 PATIENT Flag, Include if Any Flags Match
- 23 PATIENT Primary Care Physician
- 24 PATIENT Race
- 25 PATIENT Select only one patient.
- 26 PATIENT Sex
- 27 PAYMENT Allowable Schedule
- 28 PAYMENT Amount
- 29 PAYMENT Amount Due of Linked Charge
- 30 PAYMENT Amount of Linked Charge
- 31 PAYMENT Check Number Pattern
- 32 PAYMENT Exclude Open Item Payments
- 33 PAYMENT Exclude Relinked Payments
- 34 PAYMENT Include Only if Tracking Allowable Amount
- 35 PAYMENT Include Only Open Item Payments
- 36 PAYMENT Insurance Company of Payment
- 37 PAYMENT Location of Posting
- 38 PAYMENT Number of Days since Posting Date
- 39 PAYMENT Number of Days since Transaction Date
- 40 PAYMENT Overpaid from Allowable
- 41 PAYMENT Payment Class
- 42 PAYMENT Payment Type
- 43 PAYMENT Place of Service of Linked Charge

- 44 PAYMENT Procedure of Linked Charge
- 45 PAYMENT Provider of Payment
- 46 PAYMENT Transaction Date of Linked Charge
- 47 PAYMENT Transaction Month
- 48 PAYMENT Underpaid from Allowable
- 49 PAYMENT User Who Posted
- 50 Posted Date
- 51 Transaction Date

RVU CRIT

- 1 ACCOUNT Balance Total
- 2 ACCOUNT Budget Amount
- 3 ACCOUNT Date of Last Insurance Payment
- 4 ACCOUNT Date of Last Personal Payment
- 5 ACCOUNT Flag, Exclude if All Flags Match
- 6 ACCOUNT Flag, Exclude if Any Flags Match
- 7 ACCOUNT Flag, Include if All Flags Match
- 8 ACCOUNT Flag, Include if Any Flags Match
- 9 ACCOUNT Select only one account.
- 10 ACCOUNT Total Insurance Balance
- 11 ACCOUNT Total Medicaid Balance
- 12 ACCOUNT Total Personal Balance
- 13 CHARGE Age at Time of Service
- 14 CHARGE Amount Charged
- 15 CHARGE Amount Due Per Charge
- 16 CHARGE Copay Amount Per Charge
- 17 CHARGE Current Responsible Party
- 18 CHARGE Diagnoses
- 19 CHARGE Diagnoses - Include Allergy Diagnosis Only
- 20 CHARGE Diagnoses - Include Major Diagnosis Only
- 21 CHARGE Exclude Capitated Plans at Time of Service (TOS)
- 22 CHARGE Include Capitated Plans at Time of Service (TOS)
- 23 CHARGE Location of Posting
- 24 CHARGE Place of Service
- 25 CHARGE Procedure
- 26 CHARGE Procedure Type of Service
- 27 CHARGE Procedure Types
- 28 CHARGE Provider of Billing
- 29 CHARGE Provider of Service
- 30 CHARGE Provider of Service (agingprovs grouping)
- 31 CHARGE Responsible Party at Time of Service
- 32 CHARGE Responsible Party at TOS Default Copay Amoun
- 33 CHARGE Responsible Party at TOS ID Number
- 34 CHARGE Transaction Month
- 35 CHARGE Type of Provider (Real, Not Real, etc..)
- 36 CHARGE User who Posted
- 37 PATIENT Date of Birth
- 38 PATIENT Date of Last Physical

- 39 PATIENT Date of Last Visit
- 40 PATIENT Date Patient Added to Partner
- 41 PATIENT Ethnicity
- 42 PATIENT Flag, Exclude if All Flags Match
- 43 PATIENT Flag, Exclude if Any Flags Match
- 44 PATIENT Flag, Include if All Flags Match
- 45 PATIENT Flag, Include if Any Flags Match
- 46 PATIENT Primary Care Physician
- 47 PATIENT Race
- 48 PATIENT Select only one patient.
- 49 PATIENT Sex
- 50 RVU RVU Value per Procedure (a range)
- 51 Transaction Date

SUBSCRIBER INFO

- 1 ACCOUNT Balance Total
- 2 ACCOUNT Budget Amount
- 3 ACCOUNT Date of Last Insurance Payment
- 4 ACCOUNT Date of Last Personal Payment
- 5 ACCOUNT Flag, Exclude if All Flags Match
- 6 ACCOUNT Flag, Exclude if Any Flags Match
- 7 ACCOUNT Flag, Include if All Flags Match
- 8 ACCOUNT Flag, Include if Any Flags Match
- 9 ACCOUNT Select only one account.
- 10 PATIENT Date of Birth
- 11 PATIENT Date of Last Physical
- 12 PATIENT Date of Last Visit
- 13 PATIENT Date of Next Physical
- 14 PATIENT Date Patient Added to Partner
- 15 PATIENT Ethnicity
- 16 PATIENT Flag, Exclude if All Flags Match
- 17 PATIENT Flag, Exclude if Any Flags Match
- 18 PATIENT Flag, Include if All Flags Match
- 19 PATIENT Flag, Include if Any Flags Match
- 20 PATIENT Primary Care Physician
- 21 PATIENT Race
- 22 PATIENT Select only one patient.
- 23 PATIENT Sex
- 24 POLICY Active Number of Plans for Patient
- 25 POLICY Active Policy End Date
- 26 POLICY Active Policy Start Date
- 27 POLICY Patient Age Group
- 28 POLICY Plan Order for the Account
- 29 POLICY Subscriber Birth Date
- 30 POLICY Subscriber Insurance Company (During Effective Dates)
- 31 POLICY Subscriber Sex
- 32 Posted Date
- 33 Transaction Date

VISIT CRITERIA

- 1 ACCOUNT Total Insurance Balance
- 2 ACCOUNT Total Medicaid Balance
- 3 ACCOUNT Total Personal Balance
- 4 PATIENT Date of Birth
- 5 PATIENT Date of Last Physical
- 6 PATIENT Date of Last Visit
- 7 PATIENT Date of Next Physical
- 8 PATIENT Date Patient Added to Partner
- 9 PATIENT Ethnicity
- 10 PATIENT Flag, Exclude if All Flags Match
- 11 PATIENT Flag, Exclude if Any Flags Match
- 12 PATIENT Flag, Include if All Flags Match
- 13 PATIENT Flag, Include if Any Flags Match
- 14 PATIENT Primary Care Physician
- 15 PATIENT Race
- 16 PATIENT Select only one patient.
- 17 PATIENT Sex
- 18 Posted Date
- 19 Transaction Date
- 20 VISIT Age at Time of Service
- 21 VISIT Amount Charged for Visit
- 22 VISIT Amount Due for Visit
- 23 VISIT Copay Amount Visit
- 24 VISIT Exclude Capitated Plans at Time of Service
- 25 VISIT Include Capitated Plans at Time of Service
- 26 VISIT Include Only Revenue Charges
- 27 VISIT Insko at Time of Service Default Copay Amount
- 28 VISIT Insko at Time of Service ID Number
- 29 VISIT Insurance Company at Time of Service
- 30 VISIT Place of Service
- 31 VISIT Provider of Billing
- 32 VISIT Provider of Service
- 33 VISIT Provider of Service (agingprovs grouping)
- 34 VISIT Transaction Month