

Advanced Financial Reporting Workshop

User's Conference 2024

Here are some of the things you'll do during this practice session:

- Connect to Practice Management Smart Report Suite (srs) on your own server
- Experience how to customize reports to meet your needs

Connect to your PCC server and into a Practice Management window for exercises 1-2. Please see a PCC staff member if you need assistance with connecting to your server.

Exercise 1: Create a payment-based srs report that subtotals by provider and procedure group

Once the report is created, run the report showing year-to-date payments **restricted to include all procedure groups except for Immunizations and Injections.**

Hint: Start by customizing an existing report such as "Payment Breakdown by Provider"

Exercise 2: Create a visit-based report showing individual visits classified in the "Misc" category

Hint: Since we want to see individual visits, be sure to specify **"Show Only Subtotal Lines = No"** when creating the custom report.

Once the report is created, run the report showing individual visits this year that are being classified as "Misc".

Be sure to add the following restrictions when running the report:

- Visit Category = "Misc Visit"
- "Include only Revenue Charges"

View the billing history for some of these visits. Which CPT codes are being billed causing them to be classified in the "Misc" category?