



Changes to Reports in Optimis

We are making some big and important changes to some of the reports in OptimisPT. These changes are outlined below:

New Patients By Referral Source

- Updated to be able to include the demographic information (Address, Phone, Fax, and Email) of the physician
- When grouping, the “group” will repeat in the corresponding rows
- General speed improvements and updates

Complete Patient List

Complete Patient List

For Practice

Filter by Therapist:

Filter by Physician:

Include patient address

Include email

Include birthdate

Include phone

Include Date Last Seen

Start Date:

End Date:

* Dates filter patients with visits in date range

- Added filter for therapist
- Added filter for physician
- Added checkboxes to include/exclude information: Address, email, birthdate, phone, date last seen
 - Added date range (looks at patients that have visits within that date range)

Cancellation and No-Shows

Cancellation and No-Shows ▼

For Practice ▼

Group by:

Clinic ▼

▼

Include Rescheduled

Include Deleted

Start Date:

09/01/2020

End Date:

01/06/2021

View Report

- Ability to pull for practice, clinic, or therapist
- Ability to group by clinic, therapist, insurance, payer type (2 levels, so you can group by clinic AND therapist)
- Ability to include Rescheduled visits
- Ability to include Deleted visits
- General report updates

Payment Report

Payment ▼

For Practice ▼

Group By

Category ▼

Payment Method

All ▼

Payment Type

All ▼

Start Date:

- Ability to group by payment type or clinic
- Clinic name included in report
- Fields will repeat in the CSV download (clinic names, payment types, etc)
 - Subtotal at the clinic and payment category, then payment type
- General report updates

ICD Report

ICD Report ▼

For Practice ▼

Therapist

All ▼

All EOCs ▼

Only Post Surgical

Start Date:

03/01/2020

End Date:

01/06/2021

[View Report](#)

- Report name changed from ICD to ICD Report
- ICD-9 Option removed
- Filter to include only post surgical cases
- General report updates

Daily Visits by Status

Daily Visits by Status ▼

For Practice ▼

Group by:

By Visit Status ▼

Include Case Visit Count

Include DELETED visits

Start Date:

01/20/2021

End Date:

01/20/2021

[View Report](#)

- Added the payer type as a field
- Added charge amount for billed, complete, or hold visits.
- Added the visit count for the episode of care
- General report updates

Total Visits

Reports

Total Visits ▾

For Practice ▾

Group by:

By Clinic ▾

By Therapist ▾

Include subtotals

Start Date:

01/20/2021

End Date:

01/20/2021

View Report

- Added grouping options to group by one or two criteria
- Added subtotals to the report if subtotals box is checked
- General report improvements

New Patients Report

Reports

Total Visits ▾

For Practice ▾

Group by:

By Clinic ▾

By Therapist ▾

Include subtotals

Start Date:

01/20/2021

End Date:

01/20/2021

View Report

- Added grouping options to group by one or two criteria
- Added subtotals to the report if subtotals box is checked
- General report improvements

Medicare Certification Status Report

Medicare Certification Status ▼

For Practice ▼

Direct Access:

All ▼

Exclude Certified

Start Date:

01/20/2021

End Date:

01/20/2021

View Report

- Added date range to search by expiration date of the certification
- Added checkbox to exclude certified line items
- General report improvements