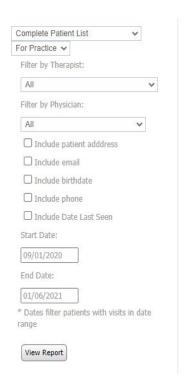
# Changes to Reports in Optimis

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

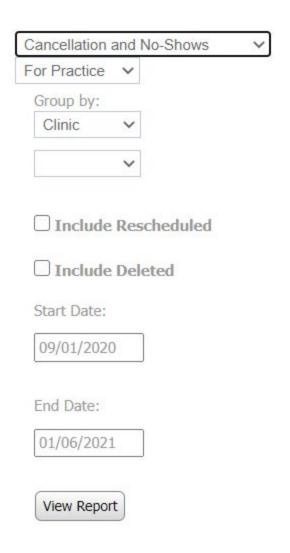
- Updated to be able to include the demographic information (Address, Phone, Fax, and Email) of the physician
- When grouping, the "group" will repeat in the corresponding rows
- General speed improvements and updates

#### **Complete Patient List**



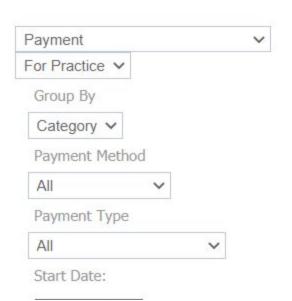
- Added filter for therapist
- Added filter for physician
- Added checkboxes to include/exclude information: Address, email, birthdate, phone, date last seen
- Added date range (looks at patients that have visits within that date range)

#### Cancellation and No-Shows



- 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



- 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**



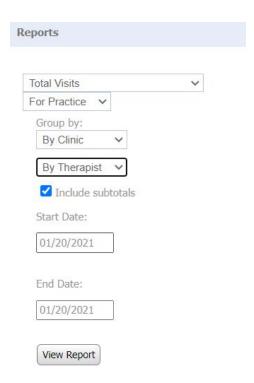
- Report name changed from ICD to ICD Report
  - ICD-9 Option removed
- Filter to include only post surgical cases
  - General report updates

## Daily Visits by Status



- 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**



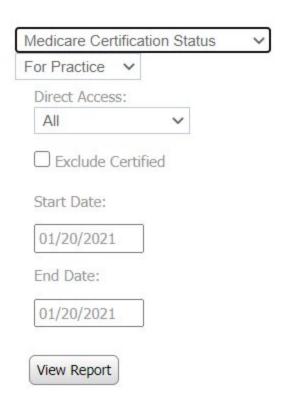
- Added grouping options to group by one or two criteria
- Added subtotals to the report if subtotals box is checked
  - General report improvements

# New Patients Report



- 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



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