24. Clinic Diagnosis Reports

All the Clinic Diagnosis Reports and Graphs are printed from the [Practice Diagnosis & Recall Manager] menu. This menu enables you to print reports or graphs regarding Follow-up efficiency, General Clinic Statistics and Referral Information.

Training objectives :

- 24.1 Accessing the Practice Diagnosis & Recall Manager Menu Basic Function;
- 24.2 <u>Selecting a Doctor Before Printing a Report</u> Basic Function;
- 24.3 Printing the New Patients Subgoalings Report (0-7 Visits) Basic Function;
- 24.4 Printing the Patients Left Without Appointment Report (Warning List) Basic Function;
- 24.5 <u>Printing the Report of Recalls</u> Advanced Function;
- 24.6 Printing the Report of Cancelled Recalls Advanced Function ;
- 24.7 Printing the Report of Patients Taken Off From Recall Manager Advanced Function;
- 24.8 Printing the Referrals Report Advanced Function ;
- 24.9 Printing the Clinic Diagnosis Module General Stats Report Basic Function;
- 24.10 Printing the Time Performance Graph Advanced Function;.
- 24.11 Selecting and Printing the Practice Diagnosis Graphs Advanced Function;
- 24.12 Setting and Printing the Practice Diagnosis Graphs Advanced Function.

Basic Function

24.1 Accessing the Practice Diagnosis Reports Menu

2

All Clinic Diagnosis Reports and Graphs are printed from the [Practice Diagnosis & Recalls Manager] menu.

From the Front Desk screen, click [List, Report] or press [L].



	ALL PROFESSIONALS	
	M PREVIOUS MENU	PRACTICE DIAGNOSIS & RECALLS MANAGER (ALL DOCTORS)
	P PROFESSIONALS / DOCTORS	M PREVIOUS MENU
	Q QUERY	P PROFESSIONAL
	X MANUAL SELECTION	R REFERENCE TABLE
	<u>G</u> MERGE	1 NEW PATIENTS SUBGOALINGS (0 - 7 VISITS)
	R EXPORT QUERY	2 WARNING LIST
	L LABELS	3 REPORT OF RECALLS
	A STATEMENT OF ACCOUNT	4 REPORT OF CANCELLED RECALLS
	6 PATIENT FINANCIAL STATEMENT	5 REPORT OF PATIENTS TAKEN OFF FROM RECALL MANAGER
	Z CONTROLS	D REPORT OF REFERRALS
	L SUMMARY	8 TIME PERFORMANCE GRAPH CHART
	\$ CURRENT BALANCE DUE	9 PRACTICE GRAPH CHART
	U CURRENT BALANCE INSURANCE	S SETUR GRAPHS TO PRINT
	K LIST OF PATIENTS BY PAYOR	A DR. CLAUDE CÔTÉ PRACTICE DIAGNOSIS
	2 TOTAL CHARGES & PAYMENTS BY PATIENT & INSURANCE	B DR. JANE DOE PRACTICE DIAGNOSIS
	4 QTY OF PATIENT BY PAYOR WITH INS. COMPLETED	
	D BALANCE DUE AS SPECIFIC DATE	4
	3 BALANCE DUE 30,60,90 DAYS	
Click [Practice	B REPORT BUILDER	The Practice Diagnosis & Recalls
Diagnosis &	T PATIENT GENERAL LEDGER	Managor monu will display. Click on the
Decello Menogor 1	O AUTOMATED OPERATION	wanager menu win display. <u>Click</u> on the
		desired option or type the number (or
or <u>press</u> [S].	S PRACTICE DIAGNOSIS & RECALLS MANAGER	letter) in front of it.
	1 ST TROTIOL DIAGNOOID & RECALLO MARAOLIN	

Basic Function

1

All Reports and Graphs can be printed for only one Doctor or for all of them. By default, all Doctors are selected. However, if the report must be printed for a single one, the Doctor must be selected prior. In the [**Practice Diagnosis & Recall Manager**] menu, press [**P**] or select [**Professional**].

PRACTICE DIAGNOSIS & RECALLS MANAGER (ALL DOCTORS) M PREVIOUS MENU P PROFESSIONAL 1 NEW PATIENTS SUBGOALINGS (0 - 7 VISITS) 2 WARNING LIST **3 REPORT OF RECALLS 4 REPORT OF CANCELLED RECALLS** 5 REPORT OF PATIENTS TAKEN OFF FROM RECALL MANAGER 6 REPORT OF REFERRALS 7 CLINIC DIAGNOSIS MODULE GENERAL STATS 8 TIME PERFORMANCE GRAPH CHART **9 PRACTICE GRAPH CHART** S SETUP GRAPHS TO PRINT A DR. CLAUDE CÔTÉ PRACTICE DIAGNOSIS **B DR. JANE DOE PRACTICE DIAGNOSIS**

2

<u>Select</u> [**Doctor Name**] or <u>press</u> the number on its left. <u>Press</u> [**Escape**] to select all professionals.

Example: press [2] to select [Dr Jane Doe].



PRACTICE DIAGNOSIS & RECALLS MANALERDI, Jane Doe

M PREVIOUS MENU

P PROFESSIONAL

R REFERENCE TABLE

- 1 NEW PATIENTS SUBGOALINGS (0 7 VISITS)
- 2 WARNING LIST
- 3 REPORT OF RECALLS
- **<u>4</u> REPORT OF CANCELLED RECALLS**

- The selected Doctor name will be displayed on the blue menu title bar.
- Example: **Dr Jane Doe** is selected and the reports will be printed for her.

This Report can be printed at the beginning of the day in order to make follow-ups on new patients and prepare the first seven visits. The report displays all patients, on the selected date, with less than 7 visits.



24.3 Printing the New Patients Subgoalings Report (0 – 7 Visits)

3

The report will be displayed on screen. It is divided into three sections :

- 1. The first section (high-lighted in red) displays all patients with less than 8 visits, who have an appointment for the selected day.
- 2. The second section (high-lighted in blue) displays all new active patients (with a date of first visit within 30 days) who have an appointment for the selected day but no future appointment after the selected day. The same name can display on parts 1 and 2.
- 3. The third section (high-lighted in green) displays all new inactive patients (with a date of first visit within 30 days). This status file can be attributed to a Patient Administrative File. See Training **#40 Other functions** for details.

r,	New paties	ats subg	goali	ing	0-7 1	visit:	s04/15/200) 3	(F2	=Exi	t, F6=Print)	
Name		Т	ime	Cod	Age	Vis	App Refere	ence			Obse	rvation
Brown	Terry		14.00) N	0	1	0					
FOLLOW-UP OF	NEW ACTIVE PATIENTS,	WITHOUT	FUTU	IRE A	PPOIN	TMENT	AFTER THE	04/1	5/200	3 (30	days)	
Name		Åge	Refe	erenc	ė		Since		Vis	App	Next Appoint	
Brown	Terry	0					04/12/2	2003	1	0		
Smith	Terry	44					03/20/2	2003	3	0		
FOLLOW-UP OF	NEW INACTIVE PATIENTS	(30 day	s)									
Name		Åge	Refe	erenc	æ		Since		Vis	App	Inactive*	
Martens	Marvin	0					04/04/2	2003	1	0	*	
			S. S. S. S. S.					0.52.52.52.53				

Press [F6] to print the report. Press [F2] to exit.

This report is one of the most important.

Print this report at the end of each day to follow up on patients who came to the clinic on the current day and left without appointment or for patients who missed their appointment. It is a Warning List. Please note that this report must be printed on the current day only. It will be impossible to print it for a past date. Also, if the report is printed before the end of appointment times, it will not be accurate.



2

The report will be displayed on screen. It contains three sections.

- 1. The first section (high-lighted in red) displays all the patients (with less than 8 visits) who left without appointment during the current day. If the Recall Module is activated, a comment will display under the [**Comment**] column.
- 2. The second section (high-lighted in blue) displays all the patients (with more than 7 visits) who left without appointment during the current day. If the Recall Module is activated, a comment will display under the [Comment] column.
- 3. The third section (high-lighted in green) displays all the patients who missed an appointment during the current day. If a reason is entered in the **Missed Appointment Ledger** (R,Q), it will display under the column [**Reason**]. The date and time of the next scheduled appointment appears under the column [**Next Appoint**] if applicable.

	VARNING LIST	(3	vis	its) 04/22/2003	(F2=Exit, F6=Print)	*
Þ	Patients left without appointment 0-7 visit	s				
	P Name	Age	Vis	Reference	Comment	
Ц	1 Brown Terry	0	2		no schedule	
Ē	Detionte left without consistent 0 wisite	<i>.</i> .				
-	Patients left without appointment 8 visits	<u>~</u> +				
	P Name	Age	Vis	Reference	Comment	
	1 Roy Colbert	14	**			
Ē						
	Missed appointments for today					
	P Name	Age	Vis	Reason	Next Appo	int
	1 Cierpial Ralphine	66	29		thu 04/24	/2003 11.30

3

Press [F6] to print the report. Press [F2] to exit.

Print this report only if the Recall Manager has been activated.

When the Recall Manager is activated, this report displays all patients who need a follow-up. The same information is displayed on the Recall Screen. See *Recall Manager* Training #23 for details. This report could be printed on a date or for a selected period of time.



3

The report will be displayed on screen. It also displays all patients who are still managed by the Recall Manager and entered in the follow-up process before the selected period of time because the follow-ups for these patients are not completed yet. All the follow-up information is displayed in this report : Follow-up dates and types.

Last Name	<u>First name</u>	P	<u>Home</u>	Work	<u>Exten</u>	<u>Rappel</u>	<u>Ut T</u>	<u>Rapp 1</u>	<u>R1</u>	Rapp 2	<u>R2</u>	<u>Rapp 3</u>	<u>R3</u>	<u>Annulé</u>	
SMITH	PHILIP AUTOMATIC, MIS	1 SED API	263-2949.51 Contment	1011		02/18/200	1 P	11	0	11	D	17	0	27	0
WEAVER	IV A AUTOMATIC, ME	1 SED API	269-2282.73 Ribert	8		02/18/200	1 P	15	0	<i>73</i>	D	71	Û	11	۵

Print this report only if the Recall Manager has been activated.

When the Recall Manager is activated, this report displays all the follow-ups that were cancelled because recalls did not give expected results or for any other reason. See *Recall Manager* Training #23 for details. This report could be printed on a date or for a selected period of time.

1	PRACTICE DIAGNOSIS & RECALLS MANAGER (ALL DOCTORS) M PREVIOUS MENU P PROFESSIONAL R REFERENCE TABLE
From the Practice Diagnosis & Recalls Manager menu, <u>click</u> [Report of Cancelled Recalls] or <u>type</u> [4].	1 NEW PATIENTS SUBGOALINGS (0 - 7 VISITS) 2 WARNING LIST 3 REPORT OF RECALLS 4 REPORT OF CANCELLED RECALLS
2 The current date will display automatically. <u>Change</u> dates if necessary. Press [Enter] to validate. The report	0 REPORT OF PATIENTS TAKEN OFF FROM RECALL MANAGER 6 REPORT OF REFERRALS 7 CLINIC DIAGNOSIS MODULE GENERAL STATS 8 TIME PERFORMANCE GRAPH CHART 9 PRACTICE GRAPH CHART
displays all Cancelled Recalls for the selected period.	<u>S</u> SETUP GRAPHS TO PRINT <u>A</u> DR. CLAUDE CÔTÉ PRACTICE DIAGNOSIS <u>B</u> DR. JANE DOE PRACTICE DIAGNOSIS
Date 3 Enter date 3 04/01/2003 04/01/2003	The report will be displayed on screen <u>Press</u> [Printer] con to print. Click the [Close Preview] icon to exit.
ENTER validate ESC cancel	

Advanced Function

Print this report only if the Recall Manager has been activated.

When the Recall Manager is activated, this report disp all Patients who are actually out of the Recall Mana See <i>Recall Manager</i> Training #23 for details. This re- could be printed on a date or for a selected period of time.	PRACTICE DIAGNOSIS & RECALLS MANAGER (ALL DOCTORS) M PREVIOUS MENU Ager. P PROFESSIONAL R REFERENCE TABLE 1 NEW PATIENTS SUBGOALINGS (0 - 7 VISITS)
I From the Practice Diagnosis & Recalls Manager menu, [Report of Patients Taken off from Recall Manager type [5].	2 WARNING LIST 3 REPORT OF RECALLS 4 REPORT OF CANCELLED RECALLS 5 REPORT OF PATIENTS TAKEN OFF FROM RECALL MANAGER 9 REPORT OF REPERRALS 7 CLINIC DIAGNOSIS MODULE GENERAL STATS 8 TIME PERFORMANCE GRAPH CHART 9 PRACTICE GRAPH CHART
The current date will display automatically. <u>Change</u> data necessary. <u>Press</u> [Enter] to validate. The report display the patients taken off from Recall Manager for the sele period.	<u>Ses if</u> ses if s all ected
Date Ente date 04/01/2003 ENTER validate ESC cancel	The report will be displayed on screen. <u>Press</u> [F6] to print. <u>Press</u> [F2] to exit.

Advanced Function

This report displays some statistics and graphs about the referrals : number of patients per reference, percentage for each reference, direct and indirect incomes, average by patient, investment in each reference, etc. See *Recall Manager* Training #23 for details.



2

The report will be displayed on screen. From this screen the report could be printed as a report or as a graph. Two different graphs are available; the first one is based on value and the second on ratio.

3

<u>Press</u> [**F6**] to print the report. If the print preview is displayed on screen, <u>click</u> the [**Printer**] icon to print the report. <u>Click</u> [**Close**] to close the preview

			Print	Preview			X			
FIRST CHO 2200 Street Platoena Be 12162	DICE CHIRC zvenne lach, QC	PRACTIC	14	< \bar{C}		Zoom 💌 I	r 9		(11/2	<u>REFERRALS</u> 26/2004 09:28)
				REFE	RRALS					Page
Référence	Direct	*	9 direct	Indir	<pre>§ indirec</pre>	Total	Moyenne	Cout	Heure	Cout ind
		124512						100000000000000000000000000000000000000		
Flyer	4	57.1 %	1959.22	2	285.00	2244.22	374.04	D.DO	0	0.00
Veshington Post	2	7.2 4	285.0D	۵	0.00	285.00	142,50	D.DO	0	0.00
Tellov Pages	2	4.4 \$	175.00	۵	0.00	175.00	87.50	0.00	D	0.00
Other Health Professionals	1	3.3 %	130.0D	a	0.00	130.00	130.00	D.DO	0	0.00
Family Physician	1	27.9 %	1090.64	۵	0.00	1098.64	1098.64	D.DO	0	0.00
Total	10	100.0 \$	3647.86	2	285.00	3932.86	366.54	0.00	٥	0.00

4

To display the chart based on value, in the **Referrals** window, <u>press</u> [**F9**]. Or, if you prefer to have a chart based on ratio, <u>press</u> [**F11**].

The chart legend could be removed by pressing [F7]. In the chart window, press [F3] to change the graph format (bar graph or curve graph).

Press [F10] to print the selected chart. Press [Escape] to close the chart.



This report is one of the most important

This report displays visits and appointment statistics (daily, weekly, monthly statistics and monthly average) for selected dates. It is helpful for Clinic Diagnosis.



24.9 Printing the Clinic Diagnosis Module General Stats Report

3

The report will be displayed on screen. <u>Click</u> the [**Printer**] icon to print. <u>Click</u> [**Close Preview**] icon to exit.

4

When the Recall Manager is activated, this section displays the number of Recalls not made in [**Past Recalls**] and to do in [**Future Recalls**].

See *Recall Manager* Training #23 for details.



PLATINUM SY STEM CHIROPRACTIC REVOLUTION 6005 GRANDE-ALLÉE BLVD BROSSARD, QC J4Z 3G4 CLINIC DIAGNOSIS MODULE GENERAL STATS 03/16/2003 (04/22/2003 14:44)

	<u>03/16/2003</u>		<u>1 - 7 DA</u>	<u>YS</u>	<u>8 - 28</u>	TOT 28	DAYS	<u>Aver 28 d</u>	<u>ays 52</u>	
NEW PATIENTS	0		3		7	10		14		
PATIENT VISITS	0		9		14	23		2100		
PATIENTS LEFT WITHOUT APPT	0	0%	3	33 %	5	8	34 %	252	12 %	
APPOINTMENTS	0	0%	152	5%	332	484	4 %	2137	98 %	
MISSED APPOINTMENTS	0	0%	146	***%	331	477	***%	662	31 %	
MISSED APPT RESCHEDULED	0	0%	135	92 %	297	432	90 %	588	88 %	
MISSED APPT NON-RESCHEDULED	0	0%	11	7%	34	45	9%	74	11 %	
PATIENTS OUT OF RECALL MODULE	0		0		0	0	0 %	*****	***%	
		<u>1 WEEF</u>	<u>۲</u>	2	- 3 WEEK	<u>.s</u>	MOR	E THAN	3	
PAST RECALLS		11			12			42		
FUTURE RECALLS		7			24		3	24		

5

New patients: number of new patients: this number is based on the first visit date that is displayed in the patient administration file;

Patient visits: number of visits (includes non scheduled appointments). This number is calculated from the services with an X in the V column (refer to Services Configuration training #5);

Patients left without appointment: number of patients left without appointment and percentage based on the patient visits for the same period of time;

Appointments: number of appointments and percentage based on the total number of appointments;

Missed Appointments: number of missed appointments and percentage based on the scheduled appointments for the scheduled appointments for the same period;

Missed Appt Rescheduled : number of patients who missed their appointment but rescheduled and percentage based on the scheduled appointments for the same period.

The Time Performance Graph displays a waiting delay evaluation. It should be printed at the end of the day.





ESC=Quit, F3=Graph type, F5=2D-3D, F6=Backcolor, F7=Legend, F10=Print



The report will be displayed on screen. It shows the following information (average for the selected period of time).

Minutes Waiting : Delay between the scheduled appointment time and the calling time.

Patients per hour : Number of visits per hour.

Performance Rate : [Patients per hour] minus [minutes waiting].

The bigger the rate, the better the performance.

3

Press

exit.

Advanced Function

Different Practice Diagnosis graphs could be printed to evaluate the progress in clinic management. Example: graphs on income, number of visits, missed appointments, missed appointments rescheduled, etc...

The selected graphs could be printed individually or in a single operation. The graphs to print must be selected prior.



24.11 Selecting and Printing the Practice Diagnosis Graphs



Advanced Function

Selected graphs could be printed in a single operation. But, the graphs must be selected prior.

2

To select the graphs to print in the batch, <u>select</u> [Set up Graphs to Print] or <u>press</u> [S].

SETUP GRAPHIQUE TO PRINT

New patients

- Patient visit without appointment
- Left without appointment

🗹 Patients visits

Scheduled appointment

Missed appointment

Missed appointment rescheduled

Missed appointment, no rescheduled

Total appointment of the system

✓ Income

Income follow-up (30 days)

V Total follow-up

Follow-up with result (30 days)

Patient visit without appointments / Patients visits

- Left without appointments / Patients visits
- Scheduled appointments / Patients visits
- Missed appointments / Scheduled appointments
- Missed appointments rescheduled / Missed appointments
- Missed appointments, no rescheduled / Missed appointments

EXIT

🔲 Income follow-up (30 days) / Total income

Total follow-up / Patients visits

E	PROFESSIONAL
R	REFERENCE TABLE
1	NEW PATIENTS SUBGOALINGS (0 - 7 VISITS)
2	WARNING LIST
3	REPORT OF RECALLS
4	REPORT OF CANCELLED RECALLS
5	REPORT OF PATIENTS TAKEN OFF FROM RECALL MANAGER
6	REPORT OF REFERRALS
7	CLINIC DIAGNOSIS MODULE GENERAL STATS
8	TIME PERFORMANCE GRAPH CHART
9	PRACTICE GRAPH CHART
<u>В</u>	SETUP GRAPHS TO PRINT DR. CLAUDE COTE PRACTICE DIAGNOSIS DR. JANE DOE PRACTICE DIAGNOSIS

<u>Check</u> the box on the left-hand side of the graph to print. <u>Click</u> [**Exit**].

24.12 Setting up the Graphs to Print Automatically



5

The graphs will display on the screen successively. Press [Escape] to print the graphic and display the next one.