



Med Tech  
Solutions

# Practice Data Analytics

45 report packages, 177 unique reports

# NextGen Clinical Reports

18 Report Packages



# Appointment Slot Productivity



## Appointment Slot Productivity

Practice

Location

Resource

Duration

Event

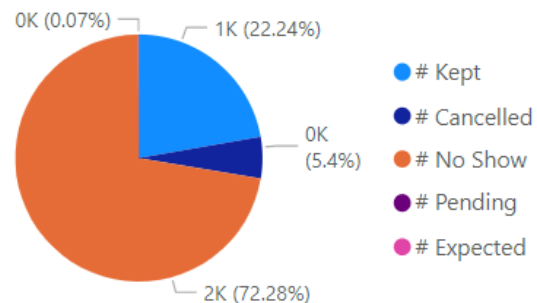
Provider

Day of Week

Appt Date




# Kept, # Cancelled, # No Show, # Pending and # Expected



### Appointment Slot Details

Appt Date	Appt Time	Appt Duration	Day of Week	Event	Location	Resource	Provider	# Scheduled
4/22/2021	09:00	15	Thursday	Consult	South Clinic	Dr.Yang Weekly	Yang MD, Christina	7
9/22/2021	11:45	30	Wednesday	Office Visit	St Paul Office	Dr. Jones	Jones MD, Tom K	5
9/20/2011	09:10	30	Tuesday	Office Visit	MTS Clinic	Dr. Grey Uro	Grey MD, Merideth	3
9/20/2011	09:10	30	Tuesday	Office Visit	MTS Clinic	Hollywood RN Test		3
12/27/2013	15:00	15	Friday	Lab	MTS Clinic	Hollywood RN Test		3
12/27/2013	15:00	15	Friday	Lab	MTS Clinic	Lab	Grey MD, Merideth	3
8/17/2011	08:30	30	Wednesday	Office Visit	Elk River Office	Hollywood RN Test		2
9/19/2011	09:15	30	Monday	Diabetic Exam	Mpls Office	Dr.Yang Weekly	Yang MD, Christina	2
9/19/2011	11:00	15	Monday	INR Lab Draw	MTS Clinic	Lab	Grey MD, Merideth	2
9/20/2011	08:00	10	Tuesday	Allergy Shot	MTS Clinic	Dr. Grey Uro	Grey MD, Merideth	2
9/20/2011	09:45	15	Tuesday	INR Lab Draw	MTS Clinic	Lab	Grey MD, Merideth	2

**Total**

**2702**

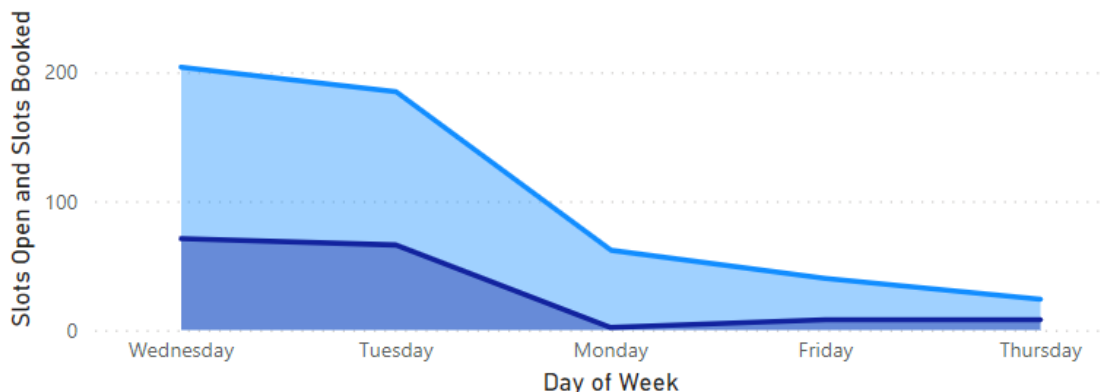
### Appointment Totals

# Scheduled	# Kept	% Kept	# Cancelled	% Cancelled	# No Show	% No Show	# Pending	% Pending	# Expected	% Expected
2702	601	22.24 %	146	5.40 %	1953	72.28 %	2	0.07 %		

Provides opened, booked appointment slot information and totals for kept, cancel and no-show.

### Slots Open and Slots Booked by Day of Week

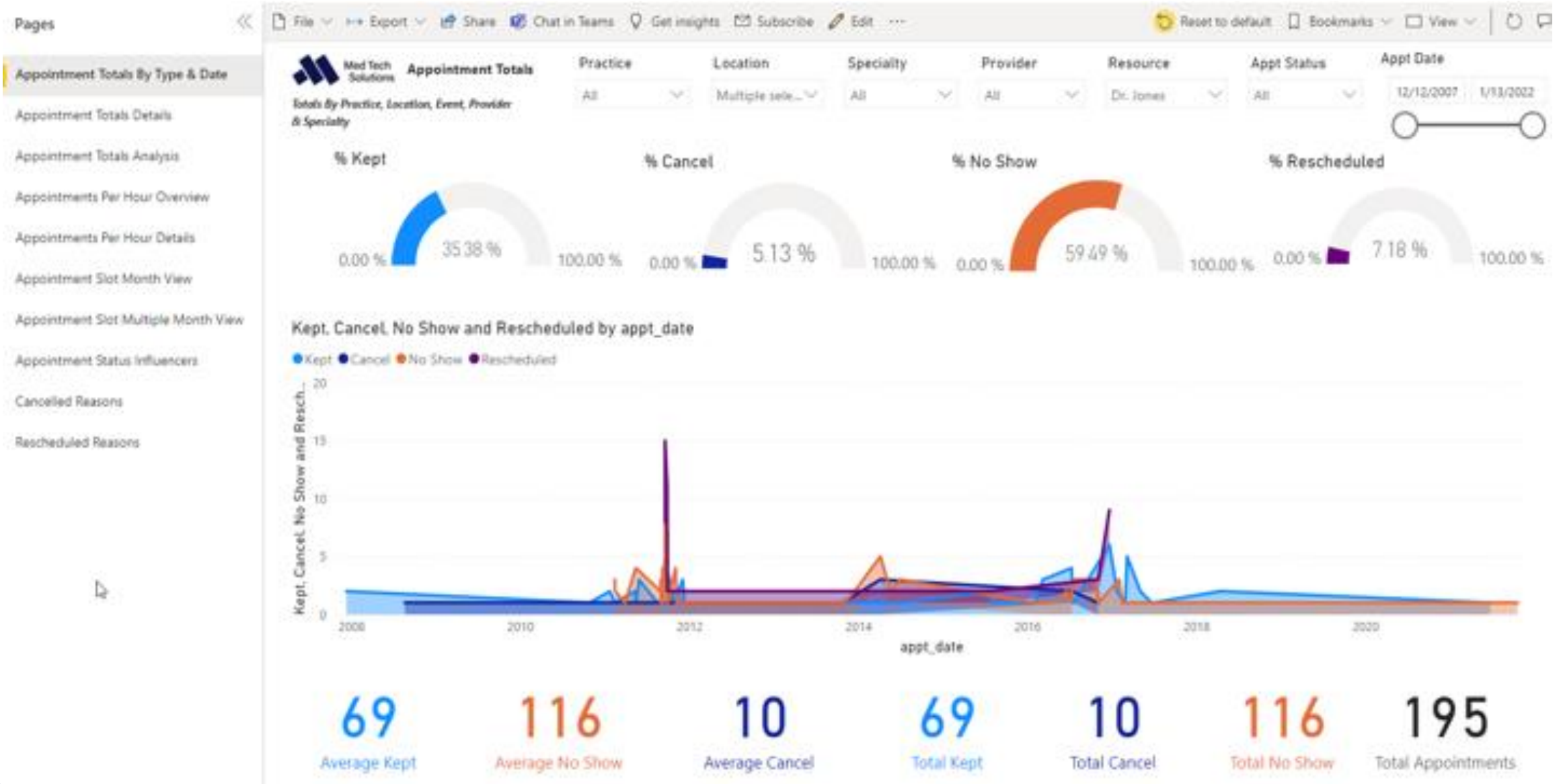
● Slots Open ● Slots Booked



# Appointment Totals Overview

Dashboard like views into appointment data, includes monthly variance on analysis page.

## 1: Appointment Totals Overview





# Appointment Totals Overview

Totals breakdowns and view by resource, location, and appt event.

## 2: Appointment Totals Details

### Pages

- Appointment Totals By Type & Date
- Appointment Totals Details**
- Appointment Totals Analysis
- Appointments Per Hour Overview
- Appointments Per Hour Details
- Appointment Slot Month View
- Appointment Slot Multiple Month View
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- Rescheduled Reasons

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**Appt Total Details**  
*Details By Practice, Event, Provider & Specialty*

Practice  
All

Location  
All

Specialty  
All

Provider  
All

Resource  
All

Appt Status  
All

Appt Date  
12/12/2007 - 1/13/2022

### Practice Totals

● Telehealth ● Walk In ● New Patient

### Totals By Resource

Resource	Date	Cancelled	Kept	No Show	Pending
Cat Scan	3/2/2021			1	
<b>Total</b>				<b>1</b>	
<b>Christina Yang MD</b>		<b>1</b>	<b>14</b>	<b>16</b>	
<b>Dr Bojangles</b>			<b>1</b>		
Dr Grey 1	5/6/2014			20	
	5/15/2015			1	
	9/26/2016			2	
<b>Total</b>				<b>23</b>	
<b>Dr Grey 2</b>				<b>10</b>	
<b>Dr Grey 3</b>				<b>2</b>	
Dr Jones 20 Min	3/12/2021		5		
	3/22/2021			1	
<b>Total</b>			<b>5</b>	<b>1</b>	

### Totals By Location

Location	Cancelled	Kept	No Show	Pend
*Elk River Office		6	18	
Elk River Office	15	70	185	
Mpls Office	6	60	211	
MTS Clinic	102	337	973	
MTS Hospital	3	17	29	
North Clinic	1	42	117	
South Clinic	3	27	145	
St Paul Office	19	153	312	
WestHealth Surgery Center	3	40	50	
Westside Clinic			6	
<b>Total</b>	<b>152</b>	<b>752</b>	<b>2046</b>	

### Totals By Appt Event

Event	Cancelled	Kept	No Show	Pending
1 OB		7	4	
2 Month Post Surgery Follow Up		1	3	
28 Wk OB	1	1	5	
3 Month Followup	22	63	98	
3 Month Follow-up		8	5	
6 Month Followup	3	7	47	
9 Month Followup		1	14	
9 Month Follow-up	1		2	
Allergy Shot	4	10	53	
Annual Physical	3	13	40	
Asthma FU	3	7	84	
Biofeedback 2	2		14	
Biofeedback 3	1		14	
Biofeedback 4			3	
Biofeedback Generic			8	

# Appointment Totals Overview

Analysis of appointments with monthly variance shown based on selected dates.

## 3: Appointment Totals Analysis

### Pages

- Appointment Totals By Type & Date
- Appointment Totals Details
- Appointment Totals Analysis**
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- Appointment Slot Month View
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- Appointment Status Influencers
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### Med Tech Solutions Appt Total Analysis

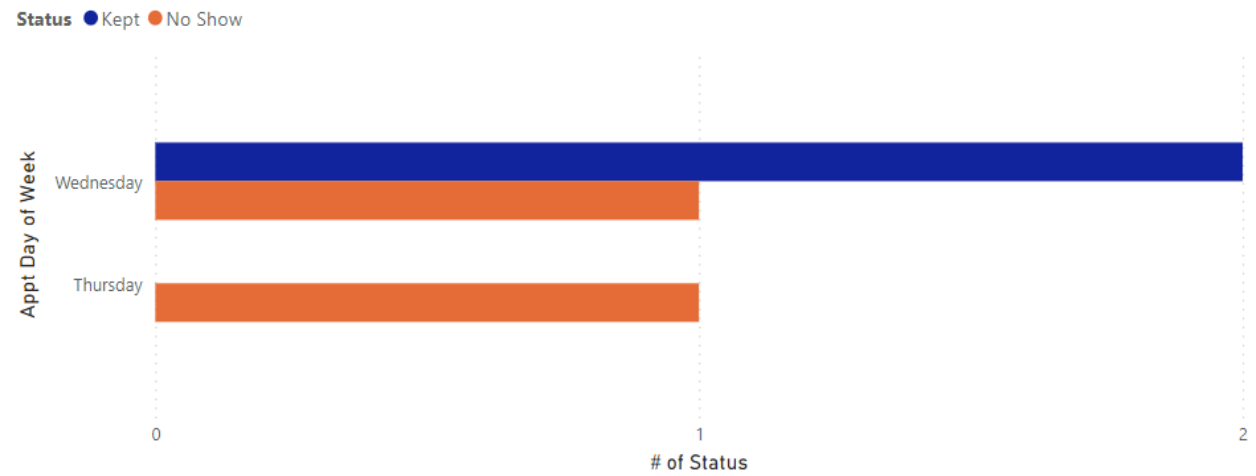
Practice: All Location: All Specialty: All Provider: All Resource: All Appt Status: All Appt Date: 2/1/2021 - 2/28/2021

Scheduled		Kept	
Sunday		Sunday	
Monday		Monday	
Tuesday		Tuesday	
Wednesday	75.00 %	Wednesday	50.00 %
Thursday	25.00 %	Thursday	
Friday		Friday	
Saturday		Saturday	

Canceled		No Show	
Sunday		Sunday	
Monday		Monday	
Tuesday		Tuesday	
Wednesday		Wednesday	25.00 %
Thursday		Thursday	25.00 %
Friday		Friday	
Saturday		Saturday	

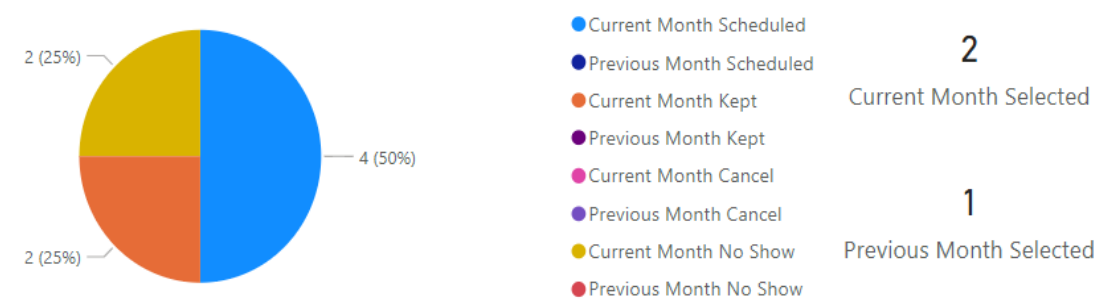
# of Status by Appt Day of Week and Status



### Monthly Comparison

Current Month Scheduled	4
Previous Month Scheduled	
% Change (Scheduled)	Infinity
Current Month Kept	2
Previous Month Kept	
% Change (Kept)	Infinity
Current Month Cancel	
Previous Month Cancel	
% Change (Cancel)	-100.00 %
Current Month No Show	2
Previous Month No Show	

### Monthly Comparison



# Appointment Totals Overview

Displays appointments by hour of day.

## 4: Appointments Per Hour Overview

- Pages
- Appointment Totals By Type & Date
- Appointment Totals Details
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**Appointment Totals Per Hour**

Resource: All

Provider: All

Location: All

Appt Hour: All

Appt Date: 1/1/2015 1/31/2022

### Booked and Unbooked by Appt Hour and Resource

Resource: Dr. Grey Uro Dr. Jones Dr. McGraw Dr. Yang Weekly Unbooked

Resource	6 AM		7 AM		8 AM		9 AM	
	Booked	Unbooked	Booked	Unbooked	Booked	Unbooked	Booked	Unbooked
Dr. Grey Uro		18		18	4	14	3	1
Dr. Jones					13	43	6	5
Dr. McGraw					3	9	3	
Dr. Yang Weekly				4	3	9	2	1
<b>Total</b>		<b>18</b>		<b>22</b>	<b>23</b>	<b>75</b>	<b>14</b>	<b>8</b>

### Booked and Unbooked by Appt Hour and Location

Location: Elk River ... Mpls Office MTS Clinic North Clinic South Clinic St Paul Office Unbooked

Location	6 AM		7 AM		8 AM		9 AM	
	Booked	Unbooked	Booked	Unbooked	Booked	Unbooked	Booked	Unbooked
Elk River Office		18		22	7	23	6	24
Mpls Office					1	7	2	6
MTS Clinic					12	32	4	36
North Clinic							1	3
South Clinic								6
St Paul Office					1	11	1	5
<b>Total</b>		<b>18</b>		<b>22</b>	<b>23</b>	<b>75</b>	<b>14</b>	<b>84</b>

### Rendering Provider

Rendering Provider	6 AM		7 AM		8 AM		9 AM	
	Booked	Unbooked	Booked	Unbooked	Booked	Unbooked	Booked	Unbooked
Grey MD, Merideth		18		22	4	75	3	
Jones MD, Tom K					13		6	
<b>Total</b>		<b>18</b>		<b>22</b>	<b>23</b>	<b>75</b>	<b>14</b>	

# Appointment Totals Overview

Detailed data from overview page with breakdowns of empty slots by resource location and types.

## 5: Appointments Per Hours Details

Pages

- Appointment Totals By Type & Date
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Med Tech Solutions **Appointment Totals Per Hour**

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Resource: All

Provider: All

Location: All

Slot Status: All

Appt Date: 1/1/2015 - 1/31/2022

**Selected Value Totals**

54	9.00	694	115.67	3	51	748
Total Booked Slots	Booked Per Hour	Total Unbooked Slots	Unbooked Per Hour	Total Kept Appts	Total No Show Appts	Total Slots

**# of Status by Status and Resource**

Resource: Dr. Grey Uro, Dr. Jones, Dr. McGraw, Dr. Yang Wu...

**# Status by Status and Location**

Location: Elk River Office, Mpls Office, MTS Clinic

**# of Status by Status and Appt Type**

Appt Type: 2 Month Po..., 28 Wk OB, 3 Month...

**Booked and Unbooked Details**

Appt Date	Appt Time	Slot Status	Resource	Provider	Location	Appt Type	Person #	Encounter #	Department	Day of Week	Slot Booked	Slot Unbooked
9/13/2021	6:00:00 AM	Slot Empty	Dr. Grey Uro							Monday		1
9/14/2021	6:00:00 AM	Slot Empty	Dr. Grey Uro							Tuesday		1
9/15/2021	6:00:00 AM	Slot Empty	Dr. Grey Uro							Wednesday		1
9/13/2021	6:10:00 AM	Slot Empty	Dr. Grey Uro							Monday		1
9/14/2021	6:10:00 AM	Slot Empty	Dr. Grey Uro							Tuesday		1
9/15/2021	6:10:00 AM	Slot Empty	Dr. Grey Uro							Wednesday		1
9/13/2021	6:20:00 AM	Slot Empty	Dr. Grey Uro							Monday		1
9/14/2021	6:20:00 AM	Slot Empty	Dr. Grey Uro							Tuesday		1
9/15/2021	6:20:00 AM	Slot Empty	Dr. Grey Uro							Wednesday		1
<b>Total</b>											<b>54</b>	<b>694</b>



# Appointment Totals Overview

Customizable calendar for viewing booked, un-booked and total slots available by day of month. Able to customize by selecting resource, location or provider.

## 6: Appointment Slot Month View

Pages

- Appointment Totals By Type & Date
- Appointment Totals Details
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Med Tech Solutions **Appointment Totals Per Hour**

Resource:

Provider:

Location:

Slot Status:

Date:

11/16/2021 - 3/15/2022

**Selected Value Totals**

2	0.33	52	0.67	(Blank)	2	54
Total Booked Slots	Booked Per Hour	Total Unbooked SL...	Unbooked Per Hour	Total Kept Appts	Total No Show Ap...	Total Slots

**Month View**

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
D+		1	1	2	3	1	2
B:				1			
U:				26			
T:				27			
D+	3	4	5	6	7	8	9
B:							
U:							
T:							
D+	10	11	12	13	14	15	16
B:					1		
U:					26		
T:					27		
D+	17	18	19	20	21	22	23
B:							
U:							
T:							
D+	24	25	26	27	28	29	30
B:							
U:							
T:							
D+	31						

**Selected Month - Year**

Month 11 Year 2022

**Selected Date Range**

From 11/16/2021 To 03/15/2022

**Selected Resource(s)**

Dr. Jones Dr. McGraw Dr. Gray Drs Dr. Rang Weekly

**Selected Location(s)**

Moja Office Elk River Office MTS Clinic South Clinic...

# Appointment Totals Overview

Customizable calendar for viewing booked, un-booked and total slots available by day of month. Able to customize by selecting resource, location or provider. **Same comment as one before. Need to update?**

## 7: Appointment Slot Multiple Month View

**Pages**

- Appointment Totals By Type & Date
- Appointment Totals Details
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**Appointment Totals Per Hour**

Resource: All | Provider: All | Location: All | Slot Status: All | Appt Date: 11/1/2021 to 2/28/2022

**Selected Value Totals**

5	0.83	135	22.50	2	3	140
Total Booked Slots	Booked Per Hour	Total Unbooked S...	Unbooked Per Ho...	Total Kept Appts	Total No Show Ap...	Total Slots

**Multiple Month View**

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
D#	Nov 1	2	3	4	5	6	7
B:		2					
U:		57					
T:		59					
D#	8	9	10	11	12	13	14
B:							
U:							
T:							
D#	15	16	17	18	19	20	21
B:	1				1		
U:	26				26		
T:	27				27		
D#	22	23	24	25	26	27	28
B:							
U:							
T:							
D#	29	30	Dec 1	2	3	4	5
B:				1			
U:				26			
T:				27			
D#	6	7	8	9	10	11	12

**Selected Month - Year**

Month: 11 Year: 2022

**Selected Date Range**

From: 11/01/2021 To: 02/28/2022

**Selected Resource(s)**

Dr. Jones, Dr. McGraw, Dr. Grey Uro, Dr. Yang Weekly

**Selected Location(s)**

Mpls Office, Elk River Office, MTS Clinic, South Clinic...



# Appointment Totals Overview

Appointment status influencers allows key influencers breakdown. Currently breakdown set for appointment status by resource for trends.

## 8: Appointment Status Influencers

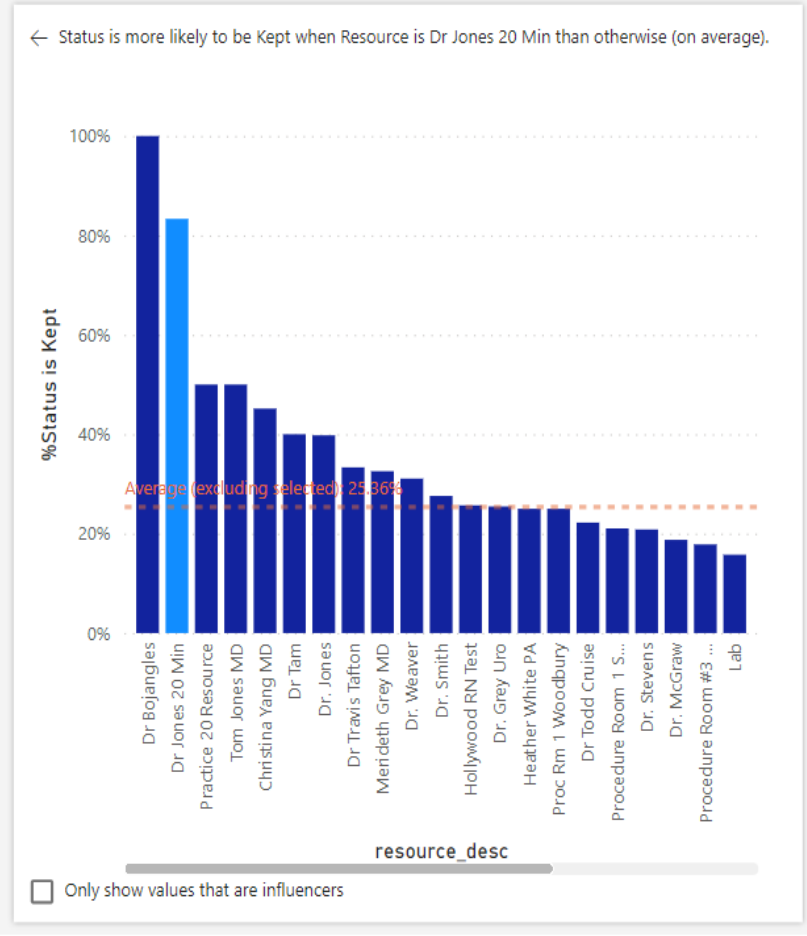
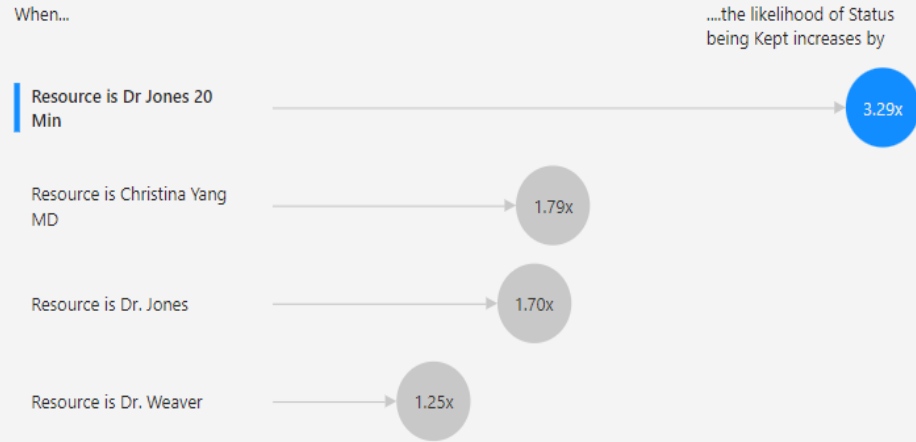
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### Key influencers Top segments

What influences Status to be Kept ?



## 9: Cancelled Reasons

Pages << File Export Share Chat in Teams Get insights Subscribe Edit ... Reset to de

### Cancel Reasons

Appt Date	Person #	Cancel Reason	Resource
2/11/2021	39		Dr.Yang Weekly
2/24/2021	39		Dr. Jones
2/24/2021	222		Dr. Jones
2/24/2021	222		Procedure Room #3 MMIC

Appointment Totals By ...  
Appointment Totals De...  
Appointment Totals An...  
Appointments Per Hou...  
Appointments Per Hou...  
Appointment Slot Mon...  
Appointment Slot Mult...  
Appointment Status Inf...  
**Cancelled Reasons**  
Rescheduled Reasons



## 10: Rescheduled Reasons

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### Rescheduled Reasons

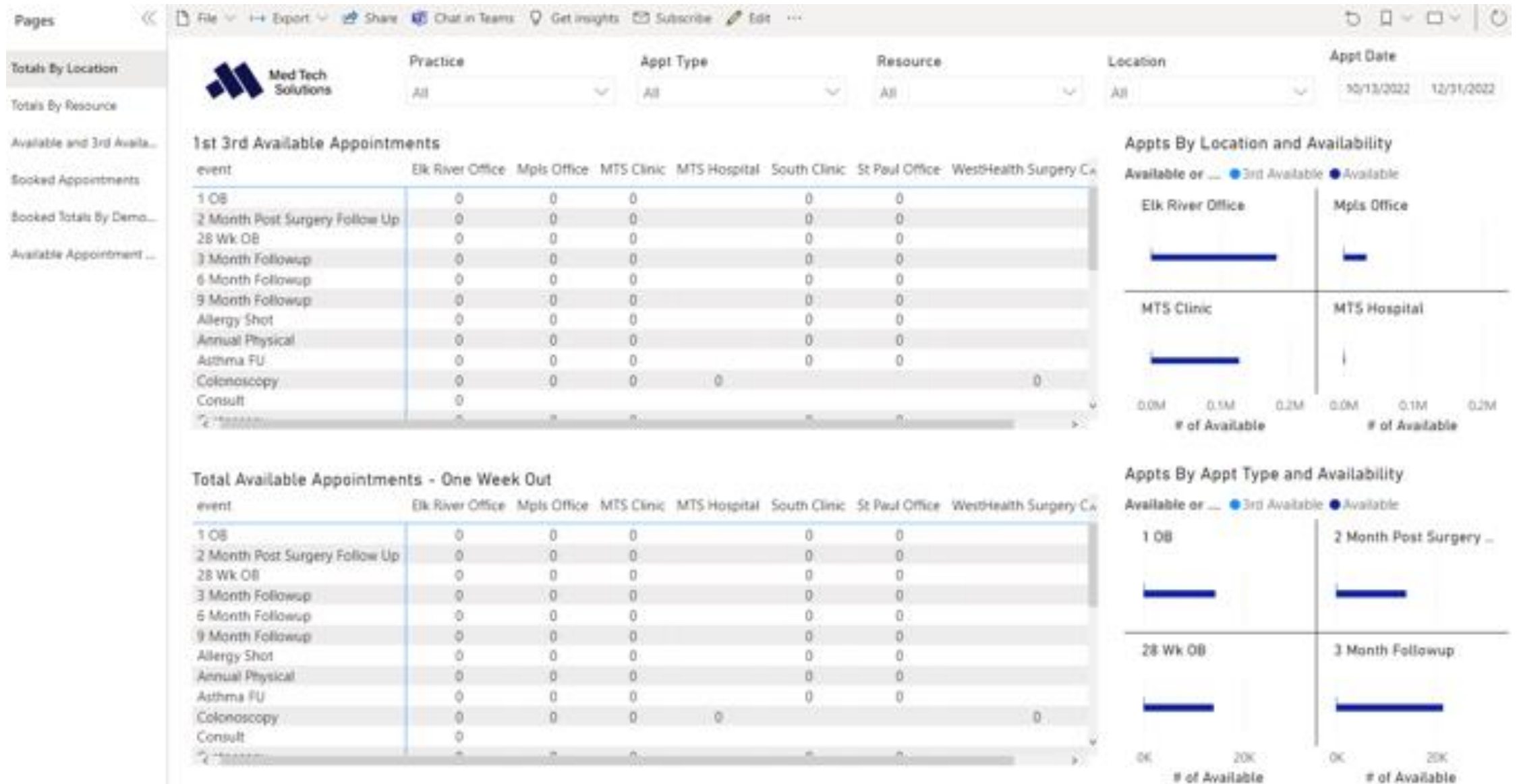
Date	Person #	Rescheduled Reason	Resource
2/11/2021	39		Dr.Yang Weekly
2/24/2021	39		Dr. Jones
2/24/2021	222		Dr. Jones
2/24/2021	222		Procedure Room #3 MMIC

Appointment Totals By ...  
Appointment Totals De...  
Appointment Totals An...  
Appointments Per Hou...  
Appointments Per Hou...  
Appointment Slot Mon...  
Appointment Slot Mult...  
Appointment Status Inf...  
Cancelled Reasons  
Rescheduled Reasons

# Available & Booked Appointments

Displays a breakdown of the total available appointments by location. Displays first 3rd available totals as well..

## 1: Total Available Appts By Location



# Available & Booked Appointments

## 2: Total Available Appts By Resource

Displays a breakdown of the total available appointments by resource. Displays first 3rd available totals as well. **Same as 1st. Do we need to update?**

Pages << File Export Share Chat in Teams Get insights Subscribe Edit ...

Med Tech Solutions Practice: All Appt Type: All Resource: All Location: All Appt Date: 10/13/2022 - 12/31/2022

### 1st 3rd Available Appointments

Appt Type	Dr. Grey Uro	New Resource Daily
1 OB	0	0
2 Month Post Surgery Follow Up	0	0
28 Wk OB	0	0
3 Month Followup	0	0
6 Month Followup	0	0
9 Month Followup	0	0
Allergy Shot	0	0
Annual Physical	0	0
Asthma FU	0	0
Colonoscopy	0	0
Consult	0	0
Cystoscopy	0	0

### Total Available Appointments - One Week Out

Appt Type	Dr. Grey Uro	New Resource Daily
1 OB	0	0
2 Month Post Surgery Follow Up	0	0
28 Wk OB	0	0
3 Month Followup	0	0
6 Month Followup	0	0
9 Month Followup	0	0
Allergy Shot	0	0
Annual Physical	0	0
Asthma FU	0	0
Colonoscopy	0	0
Consult	0	0
Cystoscopy	0	0
Diabetic Exam	0	0

### Appts By Resource and Availability

Available or ... 3rd Available Available

Dr. Grey Uro New Resource Daily

# of Available

### Appts By Appt Type and Availability

Available or ... 3rd Available Available

1 OB 2 Month Post Surgery Follow Up ...

28 Wk OB 3 Month Followup

# of Available

# Available & Booked Appointments

Displays all available appointment slots.

3: All available & 3rd Available Appt.

Pages: Totals By Location, Totals By Resource, Available and 3rd Avail..., Booked Appointments, Booked Totals By Demo..., Available Appointment ...

Med Tech Solutions

Practice: All, Appt Type: All, Resource: All, Location: All, Appt Date: 10/13/2022 - 12/31/2022

### Available Appointments Next 7 Days

Location	Resource	Appt. Type	Appt Date	Appt Time	# Days Out
Elk River Office	Dr. Grey Uro	1 OB	10/13/2022	8:00 AM	0
Elk River Office	Dr. Grey Uro	1 OB	10/14/2022	8:00 AM	1
Elk River Office	Dr. Grey Uro	1 OB	10/17/2022	8:00 AM	4
Elk River Office	Dr. Grey Uro	1 OB	10/18/2022	8:00 AM	5
Elk River Office	Dr. Grey Uro	1 OB	10/19/2022	8:00 AM	6
Elk River Office	Dr. Grey Uro	1 OB	10/13/2022	8:10 AM	0
Elk River Office	Dr. Grey Uro	1 OB	10/14/2022	8:10 AM	1
Elk River Office	Dr. Grey Uro	1 OB	10/17/2022	8:10 AM	4
Elk River Office	Dr. Grey Uro	1 OB	10/18/2022	8:10 AM	5
Elk River Office	Dr. Grey Uro	1 OB	10/19/2022	8:10 AM	6
Elk River Office	Dr. Grey Uro	1 OB	10/13/2022	8:20 AM	0
Elk River Office	Dr. Grey Uro	1 OB	10/14/2022	8:20 AM	1
Elk River Office	Dr. Grey Uro	1 OB	10/17/2022	8:20 AM	4
Elk River Office	Dr. Grey Uro	1 OB	10/18/2022	8:20 AM	5
Elk River Office	Dr. Grey Uro	1 OB	10/19/2022	8:20 AM	6
Elk River Office	Dr. Grey Uro	1 OB	10/13/2022	8:30 AM	0
Elk River Office	Dr. Grey Uro	1 OB	10/14/2022	8:30 AM	1
Elk River Office	Dr. Grey Uro	1 OB	10/17/2022	8:30 AM	4
Elk River Office	Dr. Grey Uro	1 OB	10/18/2022	8:30 AM	5
Elk River Office	Dr. Grey Uro	1 OB	10/19/2022	8:30 AM	6
Elk River Office	Dr. Grey Uro	1 OB	10/13/2022	8:40 AM	0
Elk River Office	Dr. Grey Uro	1 OB	10/14/2022	8:40 AM	1
Elk River Office	Dr. Grey Uro	1 OB	10/17/2022	8:40 AM	4
Elk River Office	Dr. Grey Uro	1 OB	10/18/2022	8:40 AM	5
Elk River Office	Dr. Grey Uro	1 OB	10/19/2022	8:40 AM	6
Elk River Office	Dr. Grey Uro	1 OB	10/13/2022	8:50 AM	0
Elk River Office	Dr. Grey Uro	1 OB	10/14/2022	8:50 AM	1

### 1st 3rd Available Appointments

Location	Resource	Appt. Type	Appt Date	Appt Time	# Days Out
Elk River Office	Dr. Grey Uro	Colonoscopy	10/13/2022	8:20 AM	0
Elk River Office	Dr. Grey Uro	Consult	10/13/2022	1:20 PM	0
Elk River Office	Dr. Grey Uro	Office Visit	10/13/2022	8:00 AM	0
Elk River Office	Dr. Grey Uro	Procedure MMC	10/13/2022	8:20 AM	0
Elk River Office	Dr. Grey Uro	Ultrasound	10/13/2022	8:20 AM	0
Elk River Office	New Resource Daily	1 OB	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	2 Month Post Surgery Follow Up	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	28 Wk OB	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	3 Month Followup	10/13/2022	8:00 AM	0
Elk River Office	New Resource Daily	6 Month Followup	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	9 Month Followup	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	Allergy Shot	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	Annual Physical	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	Asthma FU	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	Cystoscopy	10/13/2022	8:00 AM	0
Elk River Office	New Resource Daily	Diabetic Exam	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	Lab	10/13/2022	8:00 AM	0
Elk River Office	New Resource Daily	Meeting	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	New Patient	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	OV 10	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	Post Op	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	Procedure StP	10/13/2022	8:00 AM	0
Elk River Office	New Resource Daily	Recheck Visit	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	Urodynamics	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	Vasectomy	10/13/2022	8:00 AM	0
Elk River Office	New Resource Daily	Well Child Exam	10/13/2022	8:05 AM	0
Elk River Office	New Resource Daily	Year Followup	10/13/2022	8:05 AM	0



# Available & Booked Appointments

Displays all appointments booked on appointment schedule.

## 4: Booked Appointments

Pages

- Totals By Location
- Totals By Resource
- Available and 3rd Availa...
- Booked Appointments**
- Booked Totals By Demo...
- Available Appointment ...

File Export Share Chat in Teams Get insights Subscribe Edit

Med Tech Solutions

Practice: All Location: All Resource: All Appt Type: All

Appt Date: Next 30 Days 10/13/2022 - 11/11/2022

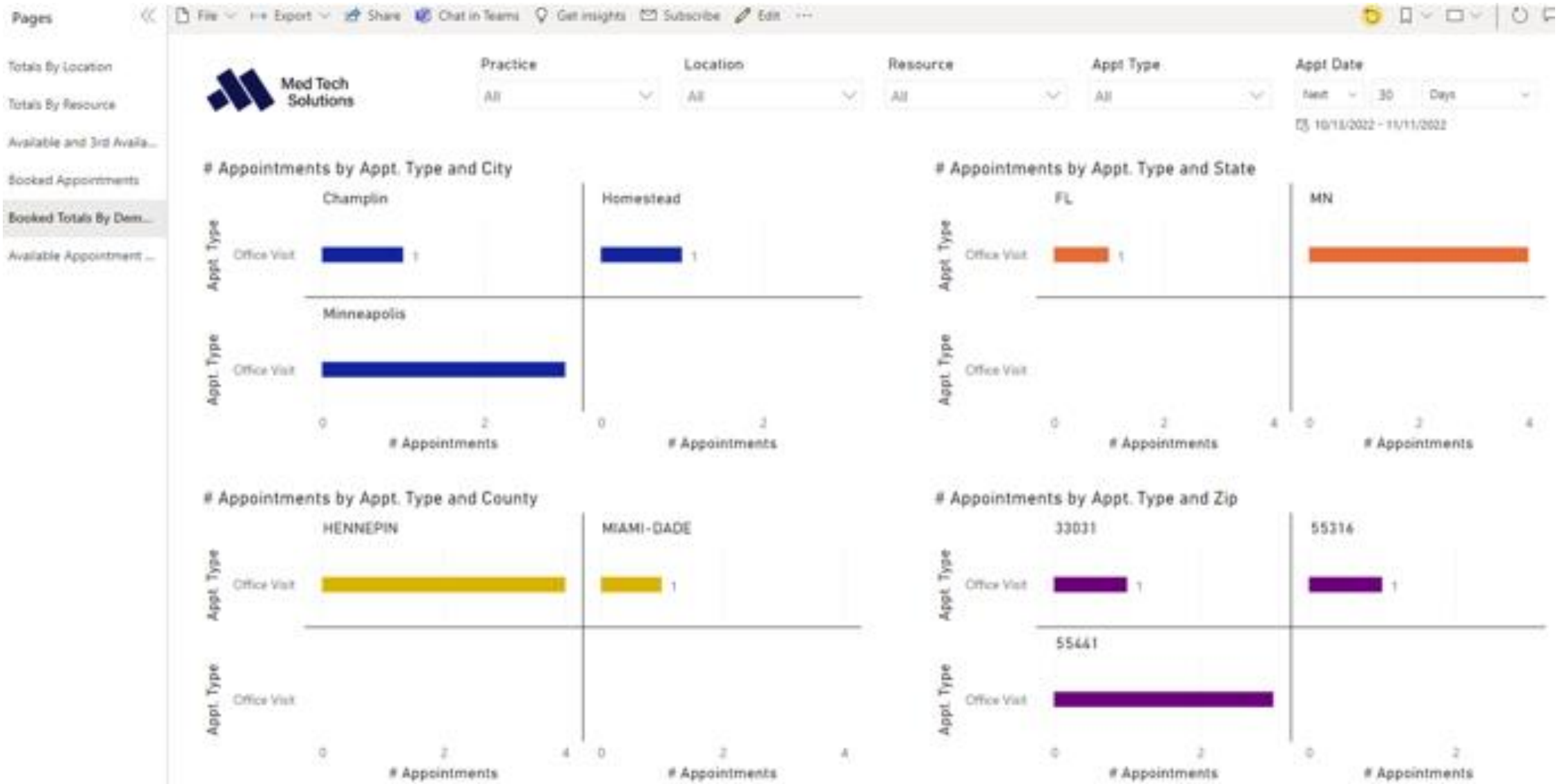
Practice	Location	Appt Date	Appt Time	Appt Type	Resource	Person #	MRN #	Patient Age Group	Patient City	Patient State	Patient
MTS Clinic	MTS Clinic	10/14/2022	8:00:00 AM	Office Visit	Dr. Yang Weekly	393	336	25 - 29	Homestead	FL	33031
MTS Clinic	MTS Clinic	10/31/2022	8:30:00 AM	Office Visit	Dr. McGraw 10 Min	369	312	20 - 24	Champlin	MN	55316
MTS Clinic	MTS Clinic	10/31/2022	8:30:00 AM	Office Visit	Dr. Grey Uro	48	3	45 and older	Minneapolis	MN	55441
MTS Clinic	MTS Clinic	10/31/2022	8:30:00 AM	Office Visit	Dr. Grey Uro	48	16	45 and older	Minneapolis	MN	55441
MTS Clinic	MTS Clinic	10/31/2022	8:30:00 AM	Office Visit	Dr. Grey Uro	48	38	45 and older	Minneapolis	MN	55441



# Available & Booked Appointments

Displays the totals of booked appointment types by the patient demographic data such as city, state, and zip.

## 5: Booked Totals By Demographics



# Available & Booked Appointments

Displays a totals breakdown of the total number of available appointments by the location scheduled demographics. Such as the location city, the location state, etc.

## 6: Available Appointments by Demographics



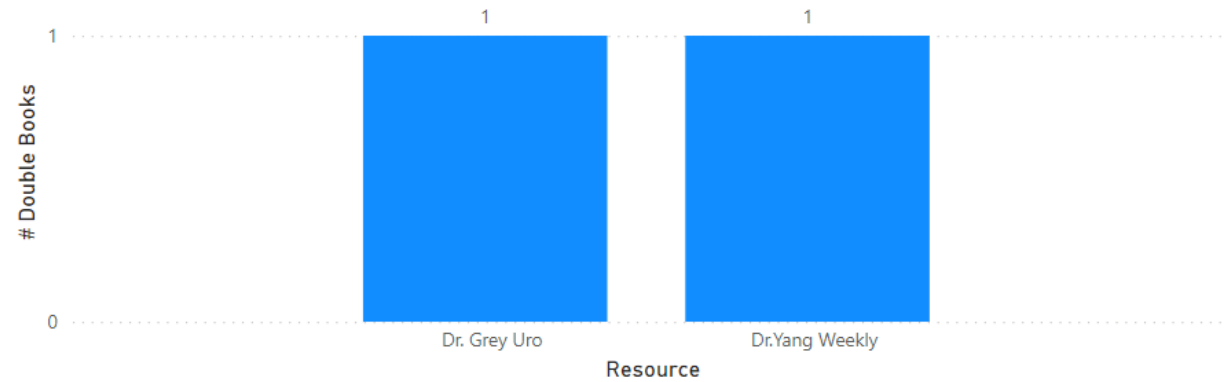
# Available & Booked Appointments

Displays all of the currently booked appointments, which easily identifies double booked slots.

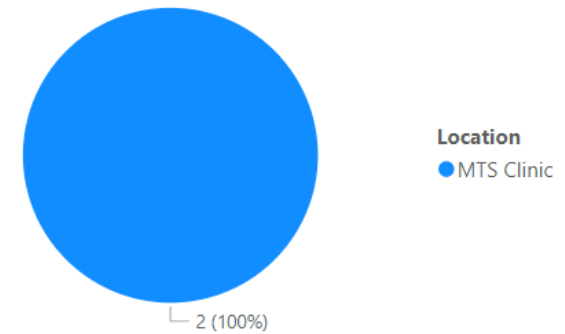
## 7: Double Booked Appointments

Practice: 
 Location: 
 Resource: 
 Appt Date:

# Double Books by Resource



# Double Books by Location



Location	Resource	Appt. Date	Appt Time	Booking Ind.	Created By	Create Date	Person #	MRN #	Rendering Provider
MTS Clinic	Dr. Grey Uro	12/25/2022	8:00:00 AM	Normal	Robert Woolley	12/13/2022	401	000000000344	Grey MD, Merideth
MTS Clinic	Dr. Grey Uro	3/30/2023	10:30:00 AM	Double Booked	NextGen Admin	12/19/2022	374	000000000318	Yang MD, Christina
MTS Clinic	Dr. Grey Uro	3/30/2023	10:30:00 AM	Normal	NextGen Admin	12/19/2022	374		Yang MD, Christina
St Paul Office	Dr. Grey Uro	12/30/2022	3:30:00 PM	Normal	NextGen Admin	12/23/2022	402	000000000345	Grey MD, Merideth
MTS Clinic	Dr. Jones	5/31/2023	8:30:00 AM	Normal	NextGen Admin	11/3/2022	400	000000000343	Grey MD, Merideth
North Clinic	Dr. Jones	12/26/2022	9:30:00 AM	Normal	NextGen Admin	12/13/2022	401	000000000344	Grey MD, Merideth
South Clinic	Dr. Jones	12/30/2022	2:45:00 PM	Normal	NextGen Admin	12/19/2022	401	000000000344	
MTS Clinic	Dr. Yang Weekly	3/20/2023	11:45:00 AM	Double Booked	NextGen Admin	12/19/2022	374	000000000318	Yang MD, Christina
MTS Clinic	Dr. Yang Weekly	3/20/2023	11:45:00 AM	Normal	NextGen Admin	12/19/2022	374		Yang MD, Christina

**2**  
Total Double Booked



# Appointment Last Encounter Detail

Used to show future appointments and details regarding last encounter.

1: Overview



**Practice:** All  
**Appt Date:** Last | T20 | Months  
**Location:** All  
**Resource:** All  
**Appt Rendering:** All  
**Person Number:** All

**2832**  
Total Appts

## Appointment Details (Select Row For Specific Details)

Person Nbr	Appt Date	Appt Time	Appt Rendering	Appt Resource	Appt Type	Future Appts
10	12/12/2007	9:00:00 AM	Jones MD, Tom K	Dr. Jones	Office Visit	
10	12/12/2007	9:15:00 AM	Jones MD, Tom K	Dr. Jones	Office Visit	
12	1/15/2008	8:00:00 AM	Stevens MD, Isabelle	Dr. Stevens	New Patient	
13	2/7/2008	8:45:00 AM	Grey MD, Merideth	Dr. Grey Uro	Lab	
13	2/15/2008	10:15:00 AM	Grey MD, Merideth	Dr. Grey Uro	Lab	
13	2/22/2008	8:30:00 AM	Grey MD, Merideth	Dr. Grey Uro	Office Visit	
13	2/22/2008	9:15:00 AM	Grey MD, Merideth	Dr. Grey Uro	Office Visit	
13	2/22/2008	9:45:00 AM	Grey MD, Merideth	Dr. Grey Uro	Office Visit	
13	2/22/2008	10:30:00 AM	Grey MD, Merideth	Dr. Grey Uro	Office Visit	
13	5/23/2008	8:00:00 AM	Grey MD, Merideth	Lab	Lab	

## Last Encounter Details

Person Nbr	Encounter Nbr	Last Enc Date	Last Enc Provider	Last Enc Location
60	6	8/4/2011	Cruise MD, Todd	WestHealth Surge
1	6	8/29/2011	Grey MD, Merideth	WestHealth Surge
97	7	9/2/2011	Jones MD, Tom K	WestHealth Surge
45	8	8/29/2011	Cruise MD, Todd	South Clinic
20	10	5/23/2012	Grey MD, Merideth	Elk River Office
146	11	9/7/2011	Grey MD, Merideth	WestHealth Surge
9	11	6/12/2012	Grey MD, Merideth	North Clinic
39	15	9/8/2011	Grey MD, Merideth	Mpls Office
20	16	8/1/2011	Grey MD, Merideth	WestHealth Surge
28	18	9/7/2011	Grey MD, Merideth	WestHealth Surge

**Labs**

- A1c
- Amylase BMP,BUN,BUN

**Diagnostics**

- (Blank)
- MRI of abdomen w/contrast

**Immunizations**

- (Blank)

**Referrals**

- (Blank)
- Referrals: Allergy and Immunology, Margaret Adam, Evaluate an...

**Screenings**

- (Blank)
- Patient Health Questionnaire (PHQ-9)Patient Health Questionnaire...

**Other Orders**

- A-Scan
- A-Scan,Impression/Plan/Corneal Topography (Trace)

**Procedures (CPT)**

- 0006T
- 0014T

**Diagnosis Codes**

- 253.5,566.1,466.0
- 300.4,786.50,558.9,250.00,493.92

**EHR Documents**

- addendum,Dictation,lab\_requisition,MTS Master Im
- APSO Summary,checkout,MTS Master Im,Patent Plan

**Templates**

- Patient Providers:\*SOAP

**Guidelines Completed**

- Depression screening
- Dilated eye exam

**Guidelines Still Due**

- Albuterol unit dose,PT/INR,CMP,Pap/HPV testing,Chest X-ray, AP
- Chest X-ray, AP (single view),ASCVD 10 year risk,Pap/HPV testin...

# Appointment Last Encounter Detail

Used to show future appointments and details regarding last encounter.

2: Raw Data

## Future Appt. Last Encounter Details - Select Appointment Date and Resource / Patient / Provider to see last encounter details



Appt Date

12/12/2007

10/31/2022

Resource

All

Appt Rendering

All

Person Number

All

2832

Total Appts

### Appointment Details (Select Row For Specific Details)

Person Nbr	Appt Date	Appt Time	Appt Rendering	Appt Resource	Appt Type	Future Appts
13	9/25/2012	8:00:00 AM	Grey MD, Merideth	Dr. Grey Uro	1 OB	
207	5/3/2012	8:30:00 AM	Grey MD, Merideth	Dr. Grey Uro	1 OB	
118	6/20/2017	9:00:00 AM	Grey MD, Merideth	Dr. Grey Uro	1 OB	
51	1/16/2013	10:00:00 AM	Grey MD, Merideth	Dr. Grey Uro	1 OB	
106	5/11/2012	10:10:00 AM	Grey MD, Merideth	Dr. Grey Uro	1 OB	
386	2/17/2022	2:10:00 PM	Grey MD, Merideth	Dr. Grey Uro	1 OB	
349	1/11/2019	8:30:00 AM	Jones MD, Tom K	Dr. Jones	1 OB	
49	5/3/2019	10:20:00 AM	Mcgraw PhD, Phil	Practice 20 Resource	1 OB	
160	5/3/2012	8:15:00 AM	Weaver MD, Carrie	Dr. Weaver	1 OB	
290	1/11/2019	8:30:00 AM	Weaver MD, Carrie	Dr. Weaver	1 OB	10/17/2022

### Last Encounter Details

Person Nbr	Encounter Nbr	Last Enc Date	Last Enc Provider	Last Enc Location	Labs on Last Enc	Diag on Last Enc	Imm on Last Enc	Referral on L <sup>®</sup>
157	5016	5/9/2022	Yang MD, Christina	MTS Clinic				
264	5094	10/3/2022	Grey MD, Merideth	MTS Clinic				
361	3341	2/16/2019	Grey MD, Merideth	St Paul Office				
308	4996	4/28/2022	Mcgraw PhD, Phil	MTS Clinic				
217	5017	5/9/2022	Mcgraw PhD, Phil	MTS Clinic				

# Care Guidelines

Overview total guidelines on encounters previously documented. Able to select specific guidelines for break downs by choice.

## 1: Overview



### Guideline Totals

Encounter Payer: 
 Encounter #: 
 Encounter Date:  
 Guideline: 
 Guideline Status:

### Status Totals by Location

Encounter Location	completed	Decline permanent	Declined	due	Excluded	Hold testing	ordered
*Elk River Office	6			157			14
Elk River Office				94			38
Gina's Radiology				47			1
Midwest Optical				15			
Mpls Office	2			70			2
MTS Clinic	39		1	2319	1	1	169
MTS Hospital				57			2
MTS Main Optical	2			28			8
<b>Total</b>	<b>52</b>	<b>1</b>	<b>2</b>	<b>2997</b>	<b>1</b>	<b>1</b>	<b>248</b>

### Status Totals by Person #

Person #	completed	Decline permanent	Declined	due	Excluded	Hold testing	ordered
1	1			22			
11				11			
18				1			
39	3			236			19
45				17			
48	3	1	1	399			67
49				109			
53	2			10			
54				48			9
63				6			
66				12			
<b>Total</b>	<b>52</b>	<b>1</b>	<b>2</b>	<b>2997</b>	<b>1</b>	<b>1</b>	<b>248</b>

### Status Totals by Encounter Provider

Encounter Provider	completed	Decline permanent	Declined	due	Excluded	Hold testing	ordered
Clark Kent	3		1	157	1		1
Cruise MD Todd	1			81			
Grey MD Merideth	38			1484			12
Jones MD Tom K	3	1	1	366			3
Mcgraw PhD Phil				131			1
Miracle Matthew				27			
Smith MD John	2			48			1
Stevens MD Isabelle				51			
Travis Tafton MD				28			
Weaver MD Carrie	2			52			1
Yang MD Christina	3			572		1	3
<b>Total</b>	<b>52</b>	<b>1</b>	<b>2</b>	<b>2997</b>	<b>1</b>	<b>1</b>	<b>248</b>

### Status Totals by Guideline

Guideline	completed	Decline permanent	Declined	due	Excluded	Hold testing	ordered
Abdomen Ultrasound; Limited (e.g., single organ, quadrant, follow-up)							13
Abdominal ultrasound							
Albuterol unit dose				5			
ASCVD 10 year risk				67			
Blood Worm				57			
Breast exam				13			
Breast MRI; Bilateral WITH and/or WITHOUT Contrast				2			
Breast MRI; Unilateral WITH and/or WITHOUT Contrast				13			
<b>Total</b>	<b>52</b>	<b>1</b>	<b>2</b>	<b>2997</b>	<b>1</b>	<b>1</b>	<b>248</b>

# Care Guidelines

## 2: Dashboard

View guidelines on encounters previously documented. Able to select specific guidelines for break downs by choice.

Pages



Care Guidelines

Care Guidelines Config...

File Export Share Chat in Teams Get insights Subscribe Edit ... Reset to default Bookmarks View



### Care Guidelines

Encounter Payer

All

Encounter #

All

Encounter Date

6/22/2020 2/24/2022

Guideline

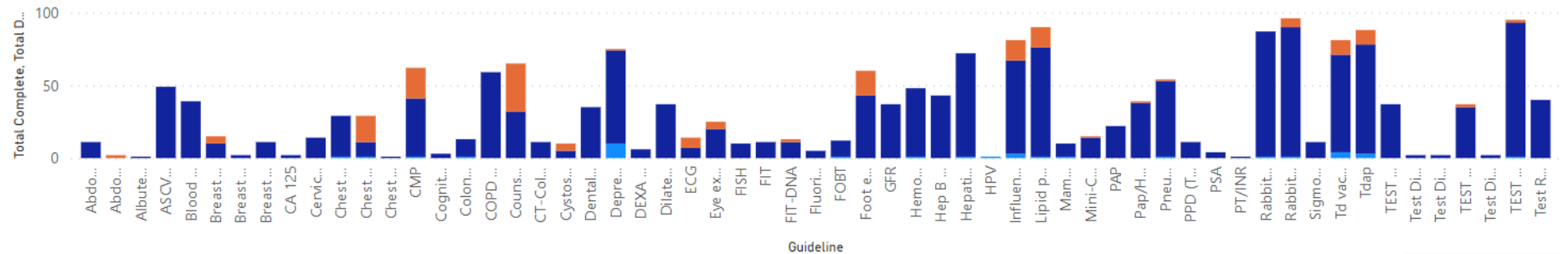
All

Guideline Status

All

### Total Complete, Total Due and Total Ordered by Guideline

Total Complete Total Due Total Ordered



Person #	Encounter #	Encounter Date	Encounter Day Week	Encounter Payer	Guideline Category	Guideline	Guideline Code	Guideline Goal	Guideline Status	High P...
1	4935	02/24/2022	Thursday	Blue Cross Blue Shield	IMM	Influenza vaccine	90658	due		
1	4935	02/24/2022	Thursday	Blue Cross Blue Shield	IMM	Td vaccine	90714	due		
1	4935	02/24/2022	Thursday	Blue Cross Blue Shield	IMM	Tdap	90715	due		
1	4935	02/24/2022	Thursday	Blue Cross Blue Shield	IMM	Pneumococcal vaccine	90732	due		
1	4935	02/24/2022	Thursday	Blue Cross Blue Shield	IMM	Zoster vaccine	90736	due		
1	4935	02/24/2022	Thursday	Blue Cross Blue Shield	IMM	Zoster vaccine (1st)	90750	due		
1	4935	02/24/2022	Thursday	Blue Cross Blue Shield	LAB	TEST HM Guidelines	12345	due		
1	4935	02/24/2022	Thursday	Blue Cross Blue Shield	LAB	Rabbit Serum Protein	12345NG	due		
1	4935	02/24/2022	Thursday	Blue Cross Blue Shield	LAB	Rabbit Serum Protien	G12345	due		

39

Total Guidelines With Complete Status

1768

Total Guidelines With Due Status

186

Total Guidelines With Ordered Status

1998

Total Guidelines



Confidential and Proprietary

# Care Guidelines

View guidelines on encounters previously documented. Able to select specific guidelines for break downs by choice.

## 3: Practice Configured Care Guidelines



### Care Guidelines Configured

Practice Name

All

Guideline Type

All

Guideline Reason

All

Guideline

All

Guideline Reason	Test Name	Test Type	Test Code	Guideline Sequence Number	Gender	Diagnosis Group	Interval	Start Age	Stop Age	Me
ACEI/ARB	Creatinine	LAB	NG001370		Both		1 year			
ACEI/ARB	Potassium	LAB	NG001180		Both		1 year			
Bladder Cancer	Cystoscopy/biopsy	PROC	52204		Both	Bladder Cancer	3 Months	20 Years	95 Years	
Bladder Cancer	FISH	LAB	NG510388		Both	Bladder Cancer	3 Months	20 Years	95 Years	
Breast CA	Breast MRI; Bilateral WITH and/or WITHOUT Contrast	DIAGSTUDY	77059		Both		6 Months	30 Years	70 Years	
Breast CA	CA 125	LAB	NG002303		Both		1 year	20 Years	75 Years	
CAD	Lipid panel	LAB	NG303756		Both		1 year	20 Years		
CHC/FQHC UDS	BMI	EXAM	CGBMIAdult		Both		Calendar year	18 years		
CHC/FQHC UDS	BMI Adult Follow-Up	INSTRUCT			Both		Calendar year	18 years		
CHC/FQHC UDS	BMI Peds Follow-Up	INSTRUCT			Both		Calendar year	3 years	18 years	
CHC/FQHC UDS	BMI percentile	EXAM	CGBMIPeds		Both		Calendar year	3 years	18 years	
CHC/FQHC UDS	Colonoscopy	DIAGSTUDY	45378		Both		10 years	50 years	74 years	G01
CHC/FQHC UDS	CT-Colonography	DIAGSTUDY	74263		Both		5 years	50 years	74 years	
CHC/FQHC UDS	Depression Follow-Up	INSTRUCT			Both		Calendar year	12 years		
CHC/FQHC UDS	Depression screening	MPROT			Both		Calendar year	12 years		
CHC/FQHC UDS	FIT	LAB	82274		Both		1 year	50 years	74 years	G03
CHC/FQHC UDS	FIT-DNA	LAB	81528		Both		3 years	50 years	74 years	
CHC/FQHC UDS	FOBT	LAB	NG008607		Both		1 year	50 years	74 years	G03
CHC/FQHC UDS	HIV screen	LAB	NG083875		Both		Once	15 years	66 years	
CHC/FQHC UDS	Mammogram	DIAGSTUDY	77067		Both		2 years	50 years	75 Years	
CHC/FQHC UDS	PAP	LAB	NG192138		Both		3 years	21 years	65 years	G01
CHC/FQHC UDS	Pap/HPV testing	LAB	NG195050		Both		5 years	30 Years	65 years	G01
CHC/FQHC UDS	Sigmoidoscopy	DIAGSTUDY	45330		Both		5 years	50 years	74 years	G01
CHC/FQHC UDS	Tobacco Follow-Up	INSTRUCT	99406		Both		2 years	18 years		
CHC/FQHC UDS	Tobacco screening	MPROT	CGTobacco		Both		2 years	18 years		
CHF	Depression screening	MPROT			Both		Once	12 years		
CHF	Echocardiogram	DIAGSTUDY	93307		Both		Once			
CHF	LVEF assessment	DIAGSTUDY			Both		Once			

# Clinical Audit

View all appointments with or with out encounters and see break down of charges, documents, and EM coding missing on visit.

## 1: Appointment Summary



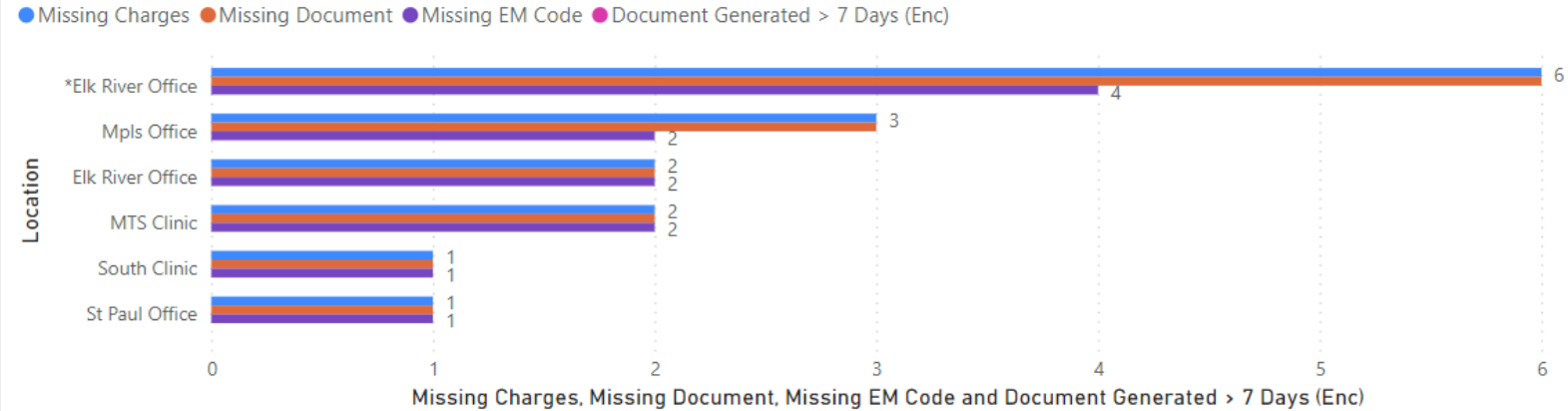
### Clinical Audit

Location: 
 Provider: 
 Appt Status: 
 Appt Type: 
 Appt Date:

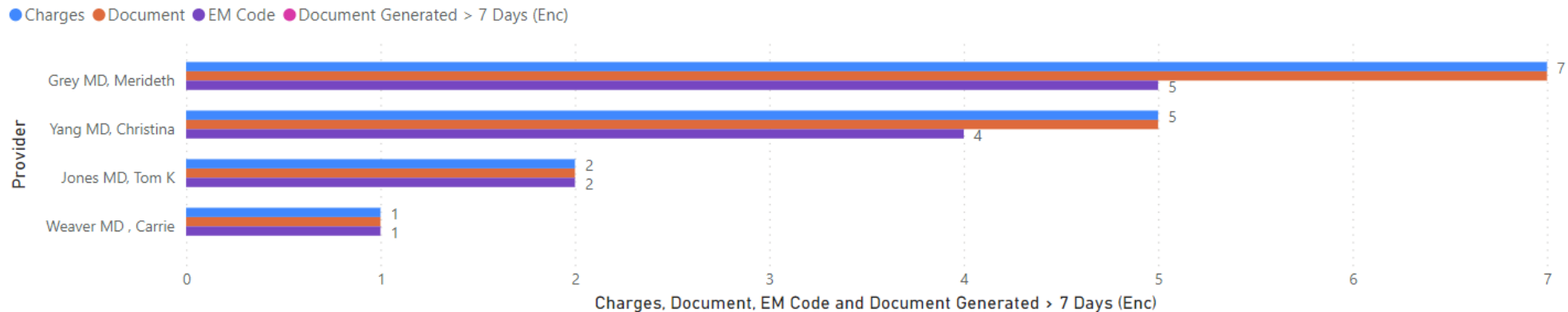
#### All Visits Audit

Total Appointments	31
Appts w/ E&M	3
%	10 %
Appts w/out E&M	12
%	39 %
Appts w/ Document	
%	
Appts w/out Document	15
%	48 %
Appts w/ Charges	
%	
Appts w/out Charges	15
%	48 %
Same Day Doc Create	
%	
Not Same Day Doc Create	
%	

#### Missing Charges, Missing Document, Missing EM Code and Document Generated > 7 Days (Enc) by Location



#### Missing Items By Provider



# Clinical Audit

Displays encounter level raw data details such as document generated, etc.

## 2: Raw Data



Location

Provider

Created By

Chief Complaint

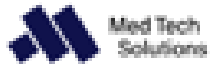
Encounter Date

Appt Date	Appt Time	Appt Type	Duration	Appt Day of Week	Appt Status	Walk In	Telehealth	New Patient	Document Found (Visit Summary)	Document (Visit Summary)	Document Create Dat
1/12/2022	08:15	Office Visit	30	Wednesday	Kept	Yes	N	Yes	No		
1/26/2022	08:30	3 Month Followup	30	Wednesday	Kept	Yes	N	No	No		
1/19/2022	08:30	3 Month Followup	30	Wednesday	Kept	Yes	N	No	No		
1/25/2022	09:00	3 Month Followup	30	Tuesday	Kept	Yes	N	No	No		
1/25/2022	08:40	3 Month Followup	30	Tuesday	Kept	Yes	N	No	No		
1/19/2022	09:00	3 Month Followup	30	Wednesday	Kept	Yes	N	No	No		
1/19/2022	09:40	3 Month Followup	30	Wednesday	Kept	Yes	N	No	No		

210





Summary Type: 
 Provider / User: 
 Enc Month: 
 Enc Year:

Provider or User	Summary Type	Encounter Month	Encounter Year	Total # Visits	Document On Encounter	% Document Generated	Document Not On Encounter	% Document
Yang MD, Christina	Encounter Provider	January	2022	1	0	0.00	1	100.0
Rosetta Interface	Encounter Created By	January	2022	6	0	0.00	6	100.0
NextGen Admin	Encounter Created By	January	2022	5	0	0.00	5	100.0
NextGen Admin	Encounter Created By	January	2022	7	0	0.00	7	100.0
Jones MD, Tom K	Encounter Provider	January	2022	1	0	0.00	1	100.0
Jones MD, Tom K	Encounter Provider	January	2022	1	0	0.00	1	100.0
Grey MD, Merideth	Encounter Provider	January	2022	6	0	0.00	6	100.0
Grey MD, Merideth	Encounter Provider	January	2022	9	0	0.00	9	100.0

**Total**



# Clinical Audit

View performance summary percentages based on filters selected on report.

## 4: Performance Summary Exceptions


 Provider: All | Created By: All | Chief Complaint: All | Location: All | Month - Year: All | Encounter Date: 1/1/2016 - 1/31/2022

### Provider Performance

Provider	Total # Encounters	Visit Summary Complete	% Visit Summary Complete	Visit Summary Not Complete	% Visit Summary Not Complete	Charges Found	% Charges Found	Charges Not Found
Clark, Kent	28	0	0.00 %	28	100.00 %	1	3.57 %	27
Clark, Kerton PAC	10	0	0.00 %	10	100.00 %	5	50.00 %	5
Cruise MD, Todd	32	1	3.13 %	31	96.88 %	15	46.88 %	17
Green AC, Jennifer	13	0	0.00 %	13	100.00 %	3	23.08 %	10
Grey MD, Meredith	1803	15	0.83 %	1788	99.17 %	236	13.09 %	156
Jones MD, Tom K	133	2	1.50 %	131	98.50 %	28	21.05 %	105
Mcgraw PhD, Phil	50	0	0.00 %	50	100.00 %	25	50.00 %	25
No Provider	1	0	0.00 %	1	100.00 %	0	0.00 %	1
Smith MD, John	66	0	0.00 %	66	100.00 %	16	24.24 %	50
Stevens MD, Isabelle	25	0	0.00 %	25	100.00 %	4	16.00 %	21
Tam, Gai	4	0	0.00 %	4	100.00 %	0	0.00 %	4
Travis Tafton, MD	4	0	0.00 %	4	100.00 %	0	0.00 %	4
<b>Total</b>	<b>2350</b>	<b>21</b>	<b>0.89 %</b>	<b>2329</b>	<b>99.11 %</b>	<b>420</b>	<b>17.87 %</b>	<b>1931</b>

### Created By Performance

Encounter Created By	Total # Encounters	Visit Summary Complete	% Visit Summary Complete	Visit Summary Not Complete	% Visit Summary Not Complete	Charges Found	% Charges Found	Charges Not Found
Becky Mack	2149	18	0.84 %	2131	99.16 %	347	16.15 %	180
Becky Mack	6	0	0.00 %	6	100.00 %	2	33.33 %	4
Gina Ehrn	9	0	0.00 %	9	100.00 %	4	44.44 %	5
Jamie Training	1	0	0.00 %	1	100.00 %	1	100.00 %	0
John Piotrowski	2	1	50.00 %	1	50.00 %	1	50.00 %	1
Jules Klatt	24	0	0.00 %	24	100.00 %	9	37.50 %	15
Julie Klatt	38	1	2.63 %	37	97.37 %	13	34.21 %	25
Kathy Zwach	40	0	0.00 %	40	100.00 %	10	25.00 %	30
Kevin Lisman	9	0	0.00 %	9	100.00 %	2	22.22 %	7
Liana Logo	3	0	0.00 %	3	100.00 %	3	100.00 %	0
Michael Manley	1	0	0.00 %	1	100.00 %	0	0.00 %	1
<b>Total</b>	<b>2350</b>	<b>21</b>	<b>0.89 %</b>	<b>2329</b>	<b>99.11 %</b>	<b>420</b>	<b>17.87 %</b>	<b>1931</b>

# COVID Report

Covid-19 testing overview with total tests and total positive tests. Shows breakdowns by location and ages.

## 1: COVID-19 Testing Pages

### COVID-19 Testing

Diagnosis -Top 8

Diagnosis - Month

Diagnosis Totals

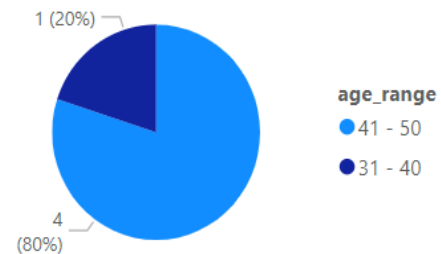
File Export Share Chat in Teams Get insights Subscribe Edit ... Reset to default Bookmarks View



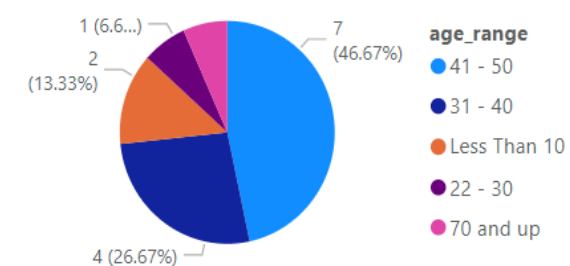
### Covid-19 Test Overview

Month	Covid Test Count	Positive Count	Percent Positivity
Feb-2022	6	3	50.00 %
Jul-2021	9	2	22.22 %
<b>Total</b>	<b>15</b>	<b>5</b>	<b>33.33 %</b>

### Positive Count by Age Range



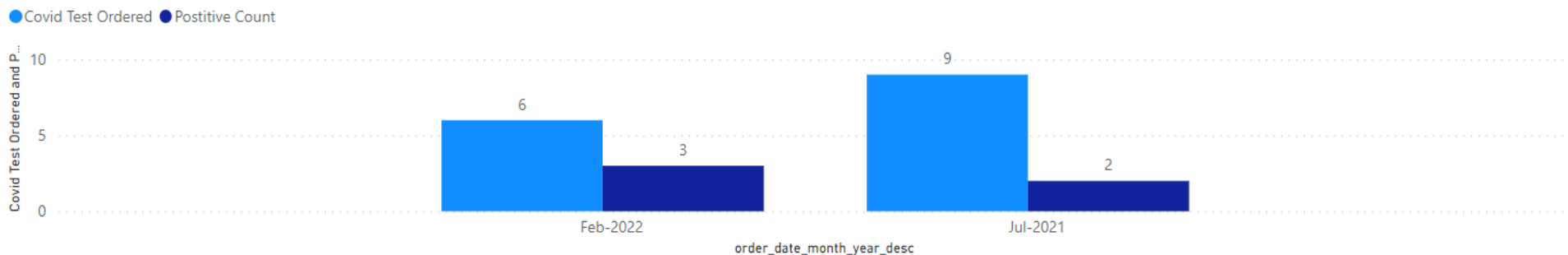
### Test Ordered Count by Age Range



### Covid Test Count by Location



### Covid Test and Positive Count by Month



## 2: Diagnosis Top 8



COVID - 19 Symptoms / Diagnosis Broken Down By Week (Shows documented Diagnosis / Symptoms for Specific COVID - 19 Tests / Encounters)

### Top 8 COVID-19 Symptoms/Diagnoses by Week



# COVID Report

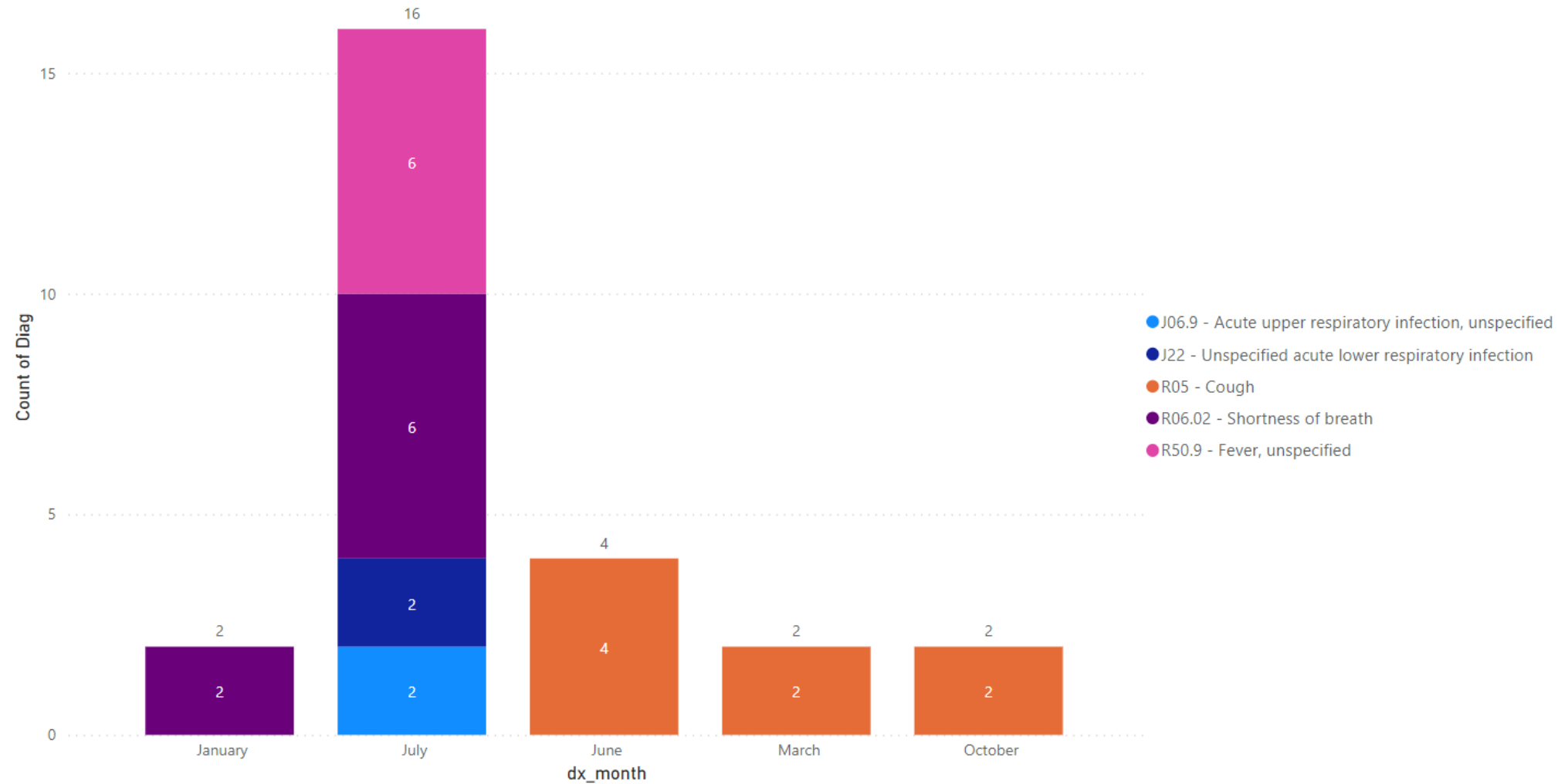
Diagnosis breakdown by month.

## 3: Diagnosis Month



COVID - 19 Symptoms / Diagnosis Broken Down By Month (Shows documented Diagnosis / Symptoms for Specific COVID - 19 Tests / Encounters)

### COVID-19 Symptoms/Diagnoses by Month



## 4: Diagnosis Totals

Pages



File Export Share Chat in Teams Get insights Subscribe Edit ...

Reset to default Bookmarks View

COVID-19 Testing



COVID - 19 Diagnoses By Week / Month (Displays all associated diagnoses / symptoms for COVID - 19 Tests/ Encounters)

Diagnosis - Top 8

### Top 8 COVID-19 Symptoms/Diagnoses by Week

Diagnosis - Month

Diagnosis

January Week 4 01/27-01/27 July Week 3 07/21-07/21 March Week 2 03/11-03/11 June Week 1 06/02-06/03 July

Diagnosis	January Week 4 01/27-01/27	July Week 3 07/21-07/21	March Week 2 03/11-03/11	June Week 1 06/02-06/03	July
J06.9 - Acute upper respiratory infection, unspecified					
J22 - Unspecified acute lower respiratory infection		2			
R05 - Cough			2		4
R06.02 - Shortness of breath	2	6			
R50.9 - Fever, unspecified		6			
<b>Total</b>	<b>2</b>	<b>14</b>	<b>2</b>		<b>4</b>



### COVID-19 Symptoms/Diagnosis by Month

Diagnosis	January	July	June	March	October	Total
J06.9 - Acute upper respiratory infection, unspecified		2				2
J22 - Unspecified acute lower respiratory infection		2				2
R05 - Cough			4	2	2	8
R06.02 - Shortness of breath	2	6				8
R50.9 - Fever, unspecified		6				6
<b>Total</b>	<b>2</b>	<b>14</b>	<b>4</b>	<b>2</b>	<b>2</b>	<b>26</b>

# Clinical Quality Measures

CQM HEDIS measures overview.

## 1: Dashboard

Measure Overview

Quality Measures



### Clinical Quality Measures Total Overview

Overview of all measures completed

Location

All

Provider

All

Encounter Date

Last 1060 Days

5/4/2021 - 3/28/2024

BP Complete	41
BP % Complete	14.49 %
BMI Complete	31
BMI % Complete	10.95%
Mammo Complete	45
Mammo % Complete	15.90%
Advance Directives Complete	
Advance Directives % Complete	
Medication List Complete	35
Med List % Complete	12.37%
Meds Reviewed Complete	35
Meds Reviewed % Complete	12.37%
Cervical Cancer Screen Complete	
Cervical Cancer Screen % Complete	
Dilated Retinal Eye Exam Complete	
Dilated Retinal Eye Exam % Complete	
ATC Complete	23
ATC Complete %	8.13 %
ATC Level Greater Than 9 Complete	
ATC Level Greater Than 9 % Complete	
ACE Inhibitor Prescribed Complete	6
ACE Inhibitor Prescribed % Complete	2.12%
Foot Exam Complete	26

Flu Shot Complete	20
Flu Shot % Complete	7.07%
Depression Screen Complete	18
Depression Screen % Complete	6.36%
Depression Screening Negative Complete	20
Depression Screening Negative % Complete	7.07 %
Depression No Significant Sx Complete	20
Depression No Significant Sx % Complete	7.07 %
Depression Mild / Moderate Sx Complete	
Depression Mild / Moderate Sx % Complete	
Depression Significant Sx Complete	9
Depression Significant Sx % Complete	3.18 %
Pneumococcal Vaccine Administered Complete	5
Pneumococcal Vaccine Administered % Complete	1.77%
Tobacco Use Assessed Complete	7
Tobacco Use Assessed % Complete	2.47%
Tobacco Use Cessation (Counseling) Complete	
Tobacco Use Cessation (Counseling) % Complete	
Tobacco Use Cessation (Pharmalogical) Complete	
Tobacco Use Cessation (Pharmalogical) % Complete	
Tobacco Use Screen and Cessation Complete	
Tobacco Use Screen and Cessation % Complete	

PCP Present	123
PCP Present % Complete	43.46 %
TB Test	
TB Test % Complete	
Hemoglobin Complete	
Hemoglobin % Complete	
Pap Done Comp	2
Pap Done % Complete	0.71 %
HPV Done Comp	2
HPV % Complete	0.71 %
Colon Done Comp	1
Colon Screen % Complete	0.35 %
Lead Screen Test	
Lead Screen % Complete	
Microalbuminuria Complete	
Microalbuminuria % Complete	
Prapare Teampate Opened Yes	
Prapare Opened Yes %	

Provider	# Of Encounters
Watson MD, Steve	133
Anderson MD, Barry	61
Abbott MD, Matt IM	35
Adams MD, Benjamin	29
Baker MD, Michael	17
Banks NP, Lisa	2
Goodby MD, James	1
Jordan MD, John	1
Mathers PA, Leila	1
Nelson, MD, Brooke	1
Test MD, CareBridge	1
WeTeacha, MD, Gary	1
<b>Total</b>	<b>283</b>

Person #	Encounter #	Age (DOS)	Age Range (DOS)	Location	Provider	Encounter Date	FQHC Encounter	Race	Gender	Ethnicity	Language	BMI.®
1	3617	50	45 and older	Westside Medical Office	Watson MD, Steve	11/9/2023	N	White	F			
1009	3273	46	45 and older	CHC Medical	Anderson MD, Barry	12/28/2022	N		M			
1019	2955	50	45 and older	Beach Optical	Adams MD, Benjamin	3/21/2022	N		M			
1019	3514	51	45 and older	Westside Medical Office	Watson MD, Steve	8/9/2023	N		M			
1020	3618	25	25 - 29	Westside Medical Office	Watson MD, Steve	11/9/2023	N		M			
1030	3574	81	45 and older	Westside Medical Office	Watson MD, Steve	9/28/2023	N		F			
1051	3320	54	45 and older	Westside Medical Office	Watson MD, Steve	2/15/2023	N		M			
1072	3271	70	45 and older	CHC Medical	Anderson MD, Barry	12/28/2022	N		F			
1099	2954	60	45 and older	Beach Optical	Adams MD, Benjamin	3/21/2022	N		M			



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# Clinical Quality Measures

Raw data of encounters and HEDIS measure(s) completed.

## 2: Raw Data



**Clinical Quality Measures**  
View encounters and measure completion  
Highlight data grid for additional filters

Practice: All | Location: All | Provider: All | Encounter Date: Last 1060 Days | 7/12/2020 - 6/6/2023

Person #	Encounter #	Age (DOS)	Age Range (DOS)	Location	Provider	Encounter Date	Race	Gender	Ethnicity	Language	BMI Assessment	Mam
1	4911	78	45 and older	Elk River Office	Grey MD, Merideth	2/16/2022	Black or African American	M	Not Hispanic or Latino	English		
1	4935	78	45 and older	MTS Clinic	Yang MD, Christina	2/24/2022	Black or African American	M	Not Hispanic or Latino	English		
1	4956	78	45 and older	Elk River Office	Grey MD, Merideth	3/3/2022	Black or African American	M	Not Hispanic or Latino	English	No	
1	4959	78	45 and older	Mpls Office	Grey MD, Merideth	3/8/2022	Black or African American	M	Not Hispanic or Latino	English	No	
1	4993	78	45 and older	MTS Clinic	Clark, Kent	4/28/2022	Black or African American	M	Not Hispanic or Latino	English		
10	3649	22	20 - 24	MTS Clinic	Grey MD, Merideth	10/20/2020	White	F	Not Hispanic or Latino	English		
10	3650	22	20 - 24	MTS Clinic	Grey MD, Merideth	10/20/2020	White	F	Not Hispanic or Latino	English		
102	4811	47	45 and older	St Paul Office	Jones MD, Tom K	8/4/2021	Asian	M	Hispanic or Latino	English		
104	4453	55	45 and older	MTS Clinic	Grey MD, Merideth	7/21/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4454	55	45 and older	MTS Clinic	Grey MD, Merideth	7/21/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4455	55	45 and older	MTS Clinic	Grey MD, Merideth	7/21/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4456	55	45 and older	MTS Clinic	Grey MD, Merideth	7/21/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4457	55	45 and older	MTS Clinic	Jones MD, Tom K	7/21/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4458	55	45 and older	MTS Clinic	Grey MD, Merideth	7/21/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4459	55	45 and older	MTS Clinic	Grey MD, Merideth	7/21/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4460	55	45 and older	MTS Clinic	Grey MD, Merideth	7/21/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4461	55	45 and older	MTS Clinic	Grey MD, Merideth	7/21/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4462	55	45 and older	MTS Clinic	Grey MD, Merideth	7/21/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4463	55	45 and older	MTS Clinic	Grey MD, Merideth	7/21/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4464	55	45 and older	MTS Clinic	Grey MD, Merideth	7/21/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4476	55	45 and older	MTS Clinic	Grey MD, Merideth	7/22/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4479	55	45 and older	MTS Clinic	Grey MD, Merideth	7/22/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4483	55	45 and older	MTS Clinic	Grey MD, Merideth	7/22/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4484	55	45 and older	MTS Clinic	Grey MD, Merideth	7/22/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4486	55	45 and older	MTS Clinic	Jones MD, Tom K	7/22/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4681	55	45 and older	MTS Clinic	Grey MD, Merideth	7/22/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4729	55	45 and older	MTS Clinic	Grey MD, Merideth	7/22/2021	Alaskan Native	F	Not Hispanic or Latino	English		
104	4746	55	45 and older	MTS Clinic	Grey MD, Merideth	7/22/2021	Alaskan Native	F	Not Hispanic or Latino	English		
108	3573	46	45 and older	Elk River Office	Weaver MD, Carrie	10/20/2020	Declined to specify	F	Not Hispanic or Latino	Arabic		



# Document Management Tracking

Review of scanned images with sign off times.

1: Dashboard

Export Share Chat in Teams Get insights Subscribe to report Edit



DM Category

All

Document

All

Provider

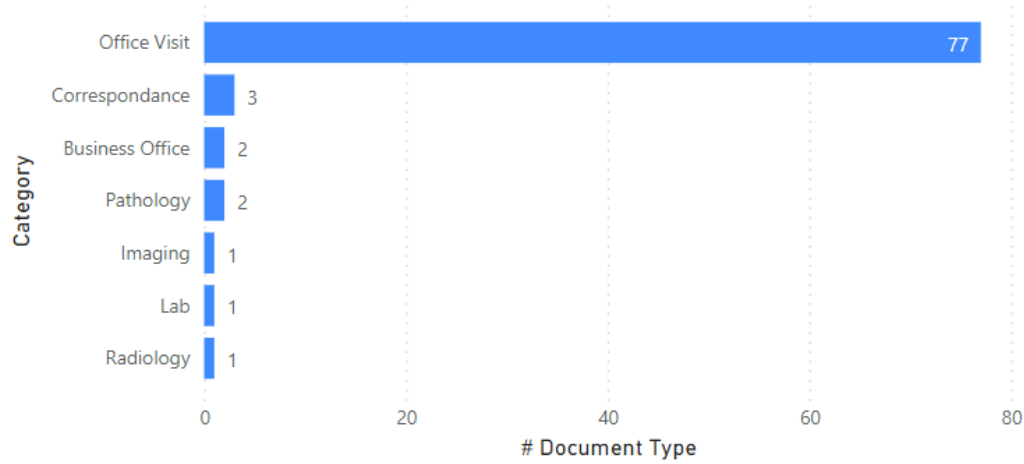
All

Document Date

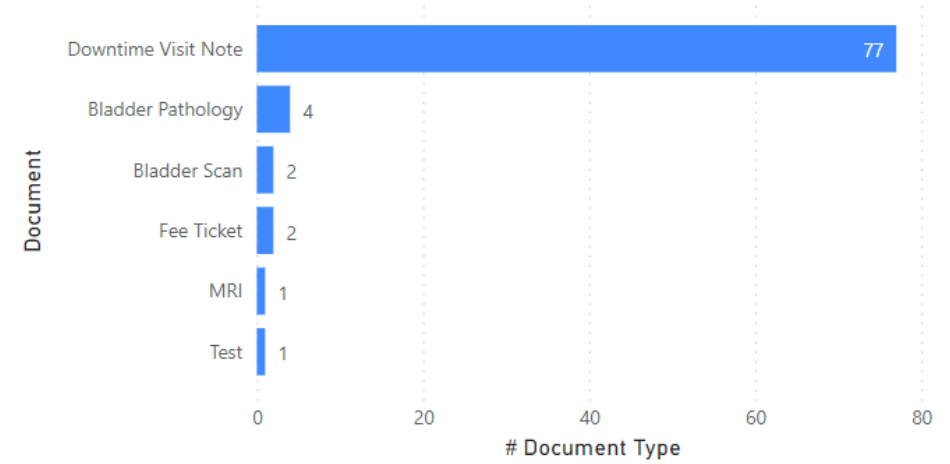
7/26/2021

1/16/2023

# Document Type by Category



# Document Type by Document



Document	Average # Days Sign-off	Average # Hours Sign-off	Average # Minutes Sign-off
Bladder Pathology	0.00	0.00	22.50
MRI	0.00	0.00	4.00
<b>Total</b>	<b>0.00</b>	<b>0.00</b>	<b>18.80</b>

Document	Accepted	Pending	Total
Bladder Pathology		4	4
MRI	1		1
<b>Total</b>	<b>1</b>	<b>4</b>	<b>5</b>




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# Document Management Tracking

Review of scanned images with sign off times. Raw data page.

## 2: Raw Data



DM Category: All | Document: All | Provider: All | Document Date: 7/26/2021 - 1/14/2023

Location	Provider	Person #	MRN	Encounter #	Encounter Date	DM Category	DM Document	DM Document Field	DM Document Field Value	Sign-off Status	# Days Review
		290	315			Correspondance	Bladder Pathology	Aquire Date	01/18/2022	Pending	0
		66	55			Correspondance	Bladder Pathology	Aquire Date	01/18/2022	Pending	0
		290	315			Pathology	Bladder Pathology	Aquire Date	01/18/2022	Pending	0
		66	55			Pathology	Bladder Pathology	Aquire Date	01/18/2022	Pending	0
		369	312			Correspondance	Bladder Scan	Aquire Date	09/23/2022		
		369	312			Radiology	Bladder Scan	Aquire Date	09/23/2022		
*Elk River Office	Grey MD, Merideth	290	315	4880	1/13/2022	Office Visit	Downtime Visit Note				
*Elk River Office	Grey MD, Merideth	48	38	4881	1/13/2022	Office Visit	Downtime Visit Note				
*Elk River Office	Grey MD, Merideth	287	225	4934	2/22/2022	Office Visit	Downtime Visit Note				
*Elk River Office	Grey MD, Merideth	287	225	4934	2/22/2022	Office Visit	Downtime Visit Note				
*Elk River Office	Jones MD, Tom K	264	201	4846	10/12/2021	Office Visit	Downtime Visit Note				
*Elk River Office	Yang MD, Christina	377	322	4818	8/13/2021	Office Visit	Downtime Visit Note				
Elk River Office	Grey MD, Merideth	39	29	4821	8/16/2021	Office Visit	Downtime Visit Note				
Elk River Office	Grey MD, Merideth	209	161	4834	9/14/2021	Office Visit	Downtime Visit Note				
Elk River Office	Grey MD, Merideth	287	225	4836	9/14/2021	Office Visit	Downtime Visit Note				
Elk River Office	Grey MD, Merideth	287	225	4840	9/17/2021	Office Visit	Downtime Visit Note				
Elk River Office	Grey MD, Merideth	344	286	4890	1/25/2022	Office Visit	Downtime Visit Note				
Elk River Office	Grey MD, Merideth	1		4956	3/3/2022	Office Visit	Downtime Visit Note				
Elk River Office	Grey MD, Merideth	1		4956	3/3/2022	Office Visit	Downtime Visit Note				
Elk River Office	Grey MD, Merideth	1		4956	3/3/2022	Office Visit	Downtime Visit Note				
Elk River Office	Grey MD, Merideth	1		4956	3/3/2022	Office Visit	Downtime Visit Note				
Elk River Office	Grey MD, Merideth	1		4956	3/3/2022	Office Visit	Downtime Visit Note				
Elk River Office	Jones MD, Tom K	209	161	4827	9/10/2021	Office Visit	Downtime Visit Note				
Elk River Office	Jones MD, Tom K	209	161	4827	9/10/2021	Office Visit	Downtime Visit Note				
Elk River Office	Jones MD, Tom K	54	44	4887	1/25/2022	Office Visit	Downtime Visit Note				
Mpls Office	Grey MD, Merideth	1		4959	3/8/2022	Office Visit	Downtime Visit Note				
Mpls Office	Grey MD, Merideth	1		4959	3/8/2022	Office Visit	Downtime Visit Note				
Mpls Office	Grey MD, Merideth	388	330	4975	3/29/2022	Office Visit	Downtime Visit Note				
Mpls Office	Jones MD, Tom K	264	201	4833	9/13/2021	Office Visit	Downtime Visit Note				

# E&M Coding Details

Breakdown of EM coding on encounters. Customizable to the practice's needs.



## E & M Coding Details

Practice, Location, Provider and Complexity

Practice

All

Location

All

Provider

All

Appt Status

All

Appt Type

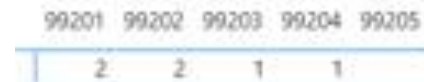
All

Appointment Date

12/12/2007 1/13/2022



### New Office Visit Counts



### % of Total Visits (New)



### % of Visit Type (New)



### Established Office Visit Counts



### % of Total Visits (Est)



### % of Visit Type (Est)



### Consult Visit Counts



### % of Total Visits (Consult)

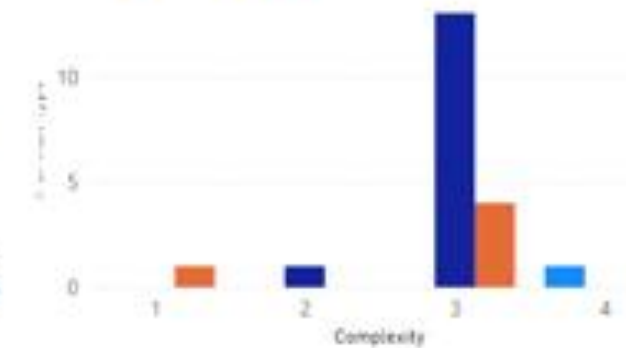


### % of Visit Type (Consult)



### Visit Levels By Type

Visit Type ● Consult ● Est ● New



Person #	Encounter #	Appt Date	Appt Time	Appt Day of Week	Appt Type	Location	Appt Status	New Patient Appt	Walk In Appt	Telehealth Appt	Key
13	118.00	Friday, January 2, 2009	08:30	Friday	Office Visit	Elk River Office	Kept	N	N	N	Y
13	232.00	Thursday, January 28, 2010	08:30	Thursday	Office Visit	Elk River Office	Kept	N	Y	N	Y
13	332.00	Wednesday, November 17, 2010	11:30	Wednesday	Office Visit	St Paul Office	Kept	N	N	N	Y
13	995.00	Wednesday, April 18, 2012	08:00	Wednesday	Office Visit	MTS Clinic	Kept	N	N	N	Y
13	1,141.00	Monday, March 11, 2013	09:00	Monday	Office Visit	South Clinic	Kept	N	Y	N	Y
13	1,156.00	Tuesday, March 19, 2013	08:30	Tuesday	Office Visit	MTS Clinic	Kept	N	Y	N	Y
15		Tuesday, August 19, 2008	08:00	Tuesday	Procedure StP	St Paul Office	No Show	N	N	N	N
15		Wednesday, October 19, 2011	08:45	Wednesday	INR Lab Draw	MTS Clinic	No Show	N	N	N	N
15		Wednesday, March 30, 2011	09:00	Wednesday	New Patient	MTS Clinic	No Show	N	N	N	N
15		Friday, September 23, 2011	09:15	Friday	Office Visit	St Paul Office	Cancelled	N	N	N	N
15		Friday, September 23, 2011	09:15	Friday	Office Visit	St Paul Office	Cancelled	N	N	N	N
15		Monday, September 19, 2011	09:15	Monday	Office Visit	St Paul Office	No Show	N	N	N	N
15		Monday, September 19, 2011	09:15	Monday	Office Visit	St Paul Office	No Show	N	N	N	N
15		Thursday, September 22, 2011	09:15	Thursday	Office Visit	St Paul Office	No Show	N	N	N	N



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# Encounter UDS

Encounter total broken down by UDS type (ex age, race, etc.).



## Encounter UDS

Age, Ethnicity, Race, Payer, Gender

Provider

All

Specialty

All

UDS Type

Gender

UDS Item

All

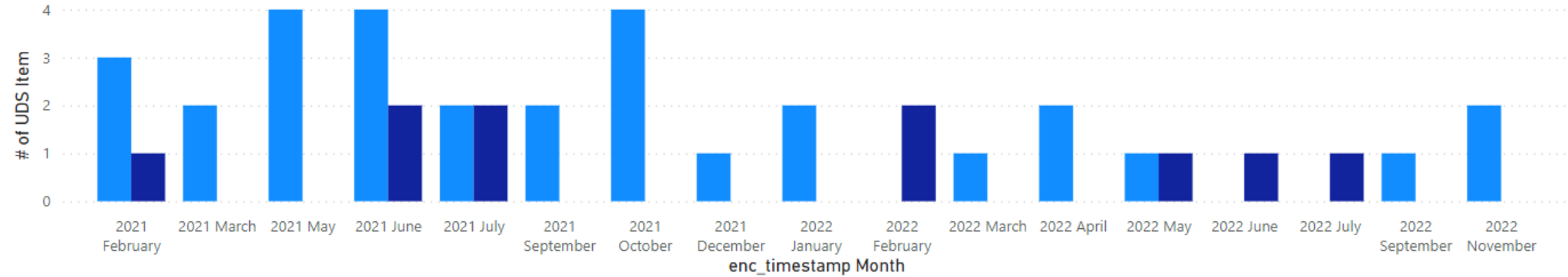
Encounter Date

1/1/2021 11/22/2022



### Count of UDS by Year

UDS Item ● Female ● Male



Location	Provider	Encounter #	Encounter Date	Specialty	UDS Type	UDS Item
Elk River Office	Cruise MD, Todd	3769	2/9/2021 1:43:00 PM	General	Gender	Female
MTS Clinic	Cruise MD, Todd	3808	5/12/2021 9:54:00 AM	General	Gender	Female
MTS Clinic	Cruise MD, Todd	4942	2/28/2022 4:42:14 PM	General	Gender	Male
MTS Clinic	Green AC, Jennifer	3870	7/21/2021 8:57:43 AM	General	Gender	Male
*Elk River Office	Grey MD, Merideth	4886	1/25/2022 11:37:13 AM	General	Gender	Female
Elk River Office	Grey MD, Merideth	3773	2/24/2021 11:49:00 AM	General	Gender	Male
Elk River Office	Grey MD, Merideth	4777	7/23/2021 7:22:00 AM	General	Gender	Female
Mpls Office	Grey MD, Merideth	5087	9/12/2022 7:39:00 AM	General	Gender	Female
MTS Clinic	Grey MD, Merideth	3814	6/8/2021 8:53:00 AM	General	Gender	Male
MTS Clinic	Grey MD, Merideth	3834	6/23/2021 1:34:00 PM	General	Gender	Male
MTS Clinic	Grey MD, Merideth	4752	7/22/2021 10:22:01 AM	General	Gender	Female
MTS Clinic	Grey MD, Merideth	4847	10/12/2021 1:35:00 PM	General	Gender	Female

# Order Module Reporting

Interface orders and results.

1: Dashboard

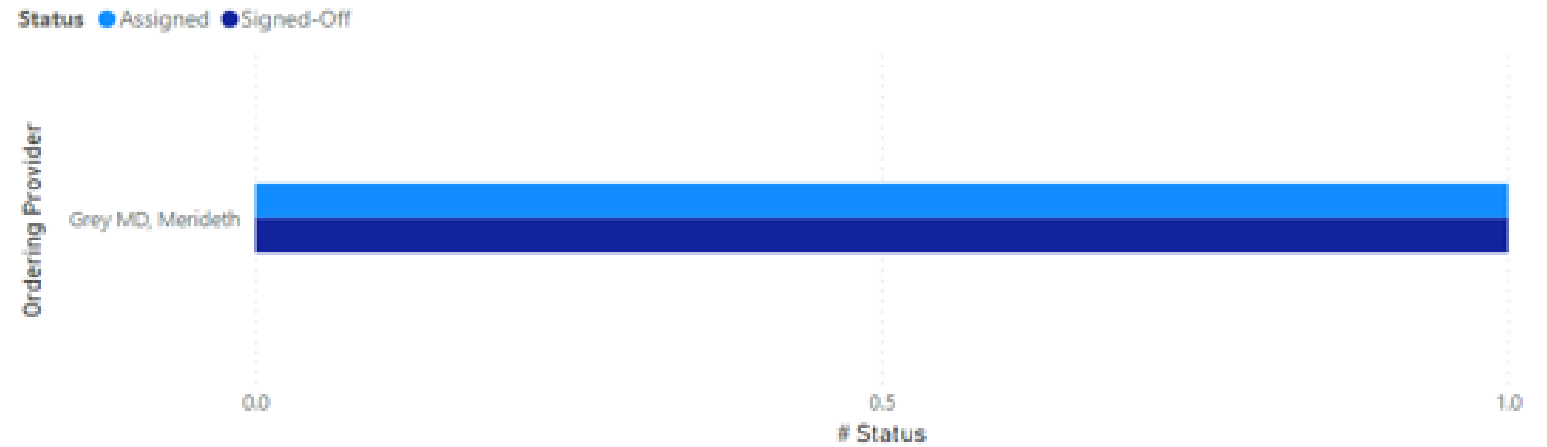


MRN #  Location  Provider  Encounter Date

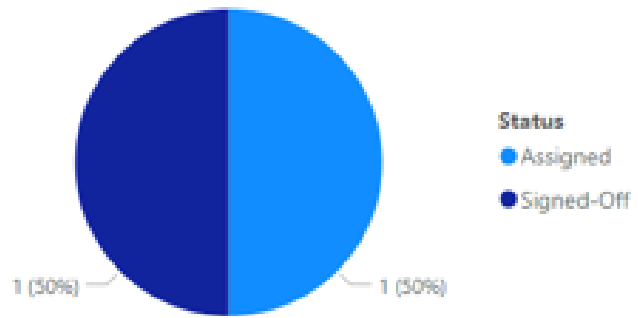
# Status by Status



# Status by Ordering Provider and Status



# Status by Status



Ordering Provider	Assigned	Signed-Off	Total
Grey MD, Merideth	1	1	2
<b>Total</b>	<b>1</b>	<b>1</b>	<b>2</b>

# Order Module Reporting

Interface orders and results, including current order status.

## 2: Raw Data



Order Module #

MRN #

Location

Provider

Encounter Date

📅 12/9/2020 - 11/3/2023

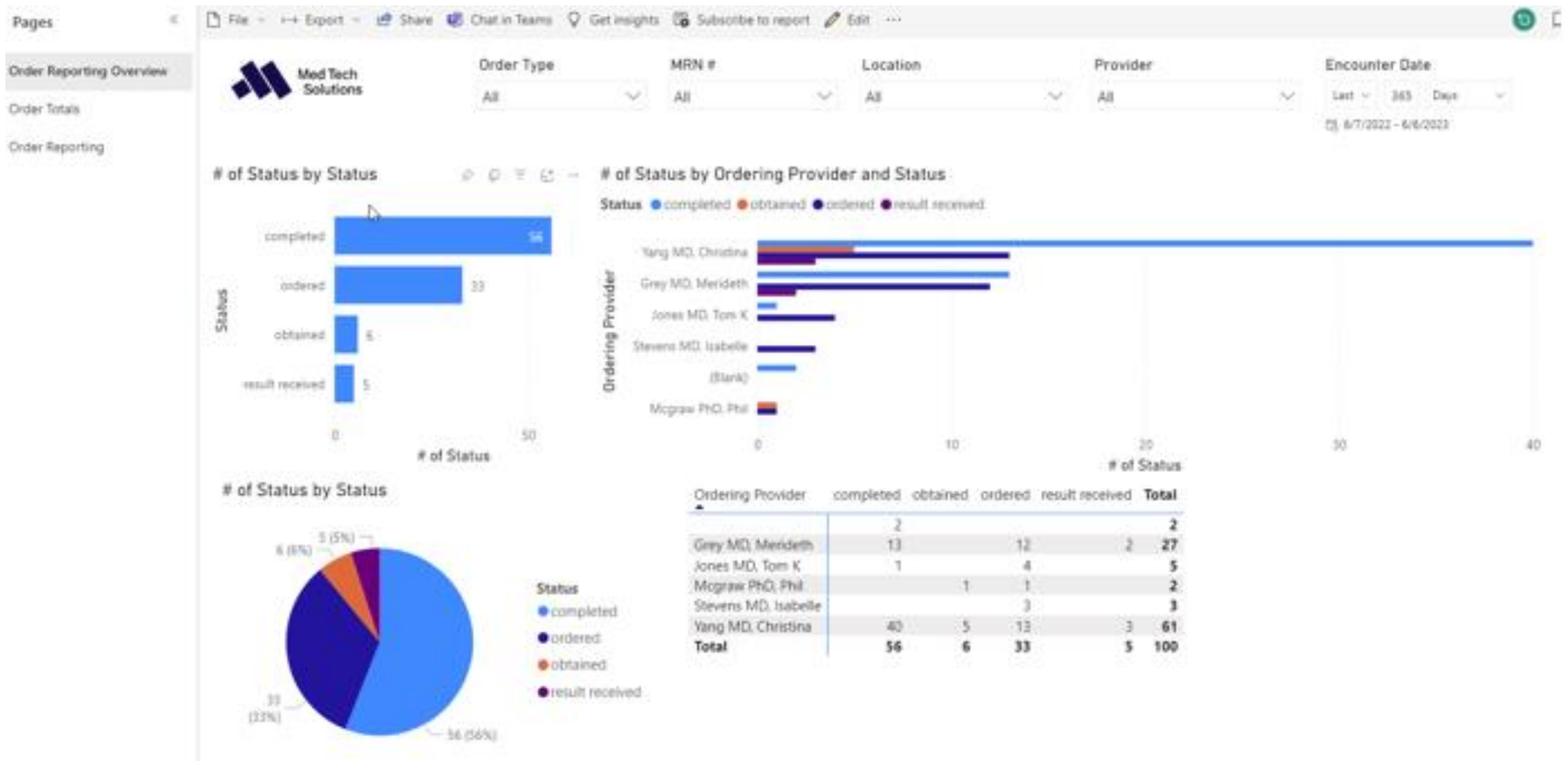
Person #	MRN	Location	Provider	Ordering Provider	Encounter Date	Age (DOS)	Gender	Race	Ethncity	Language
217	000000000166	MTS Clinic	Green AC, Jennifer	Green AC, Jennifer	7/21/2021	40 - 44	M	Indian	Declined to specify	Declined to specify
217	000000000166	MTS Clinic	Green AC, Jennifer	Green AC, Jennifer	7/21/2021	40 - 44	M	Indian	Declined to specify	Declined to specify
217	000000000166	South Clinic	Jones MD, Tom K	Jones MD, Tom K	2/4/2022	40 - 44	M	Indian	Declined to specify	Declined to specify
264	000000000201	Elk River Office	Grey MD, Merideth	Green AC, Jennifer	7/21/2021	20 - 24	M	Indian	Declined to specify	English
264	000000000201	Elk River Office	Grey MD, Merideth	Green AC, Jennifer	7/21/2021	20 - 24	M	Indian	Declined to specify	English
264	000000000201	MTS Clinic	Grey MD, Merideth	Grey MD, Merideth	12/9/2020	20 - 24	M	Indian	Declined to specify	English
264	000000000201	MTS Clinic	Grey MD, Merideth	Grey MD, Merideth	12/9/2020	20 - 24	M	Indian	Declined to specify	English
264	000000000201	MTS Clinic	Grey MD, Merideth	Grey MD, Merideth	11/11/2022	20 - 24	M	Indian	Declined to specify	English
264	000000000201	MTS Clinic	Grey MD, Merideth	Grey MD, Merideth	11/30/2022	20 - 24	M	Indian	Declined to specify	English
268		North Clinic	Grey MD, Merideth	Grey MD, Merideth	2/4/2022	45 and older	F	Declined to specify	Declined to specify	English
268	000000000206	North Clinic	Grey MD, Merideth	Grey MD, Merideth	2/4/2022	45 and older	F	Declined to specify	Declined to specify	English
287	000000000225	South Clinic	Jones MD, Tom K	Jones MD, Tom K	2/4/2022	Under 15	F	American Indian or Alaska Native	Declined to specify	Arabic
290	000000000032	MTS Clinic	Green AC, Jennifer	Green AC, Jennifer	7/21/2021	35 - 39	M	Asian	Declined to specify	Chinese
290	000000000032	MTS Clinic	Green AC, Jennifer	Green AC, Jennifer	7/21/2021	35 - 39	M	Asian	Declined to specify	Chinese
290	000000000032	North Clinic	Grey MD, Merideth	Grey MD, Merideth	2/4/2022	35 - 39	M	Asian	Declined to specify	Chinese
290	000000000315	MTS Clinic	Green AC, Jennifer	Green AC, Jennifer	7/21/2021	35 - 39	M	Asian	Declined to specify	Chinese
290	000000000315	MTS Clinic	Green AC, Jennifer	Green AC, Jennifer	7/21/2021	35 - 39	M	Asian	Declined to specify	Chinese
290	000000000315	North Clinic	Grey MD, Merideth	Grey MD, Merideth	2/4/2022	35 - 39	M	Asian	Declined to specify	Chinese
292	000000000237	MTS Clinic	Green AC, Jennifer	Green AC, Jennifer	7/21/2021	40 - 44	M	American Indian or Alaska Native	Not Hispanic or Latino	Arabic
292	000000000237	MTS Clinic	Green AC, Jennifer	Green AC, Jennifer	7/21/2021	40 - 44	M	American Indian or Alaska Native	Not Hispanic or Latino	Arabic
293	000000000249	MTS Clinic	Grey MD, Merideth	Grey MD, Merideth	4/22/2021	45 and older	F	Asian	Hispanic or Latino	Cambodians
301	000000000243	South Clinic	Jones MD, Tom K	Jones MD, Tom K	2/4/2022	45 and older	M	White	Not Hispanic or Latino	English
306	000000000281	MTS Clinic	Green AC, Jennifer	Green AC, Jennifer	7/21/2021	30 - 34	M	American Indian or Alaska Native	Declined to specify	Arabic
315	000000000255	MTS Clinic	Green AC, Jennifer	Green AC, Jennifer	7/21/2021	35 - 39	F	White	Declined to specify	English
333	000000000274	MTS Clinic	Green AC, Jennifer	Green AC, Jennifer	7/21/2021	Under 15	F	White	Not Hispanic or Latino	English
344	000000000286	South Clinic	Jones MD, Tom K	Jones MD, Tom K	2/7/2022	45 and older	F	Greek	Declined to specify	Arabic
374		*Elk River Office	Grey MD, Merideth	Grey MD, Merideth	7/8/2021	30 - 34	M	White		English



# Order Reporting

Overview dashboard view of order totals. Filters available for specific order lookups.

## 1: Overview



# Order Reporting

Additional totals overview.

## 2: Order Totals



Order Type

Referral

MRN #

All

Location

All

Provider

All

Encounter Date

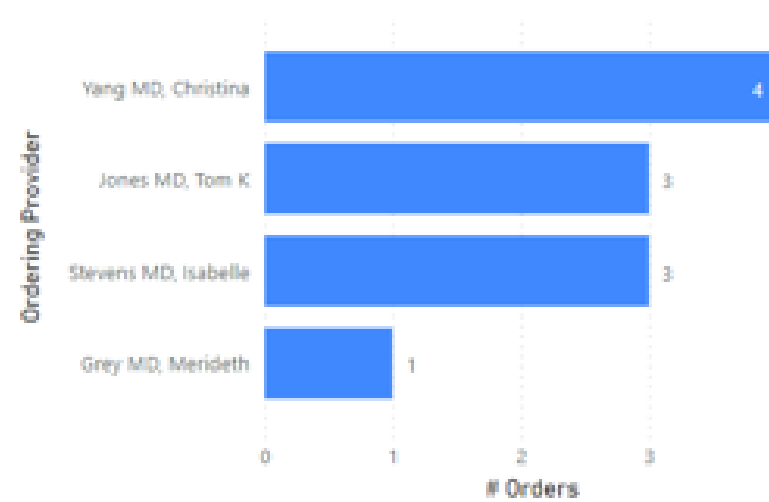
Last 365 Days

6/7/2022 - 6/6/2023

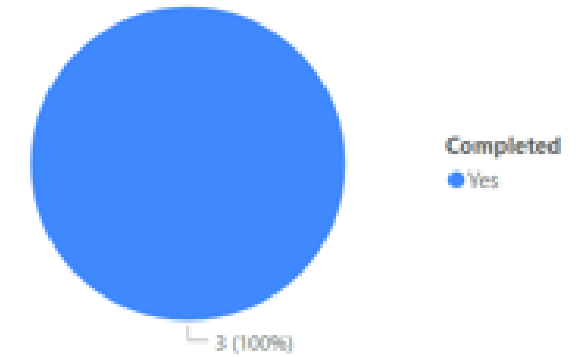
Total Orders by Order

Order	# Order
Referrals: Allergy and Immunology. John Andrews MD. Evaluate and treat	1
Referrals: Cardiac Surgery. Assume care	1
Referrals: Infectious Disease. Gina Ehni MD. Assume care	1
Referrals: Nephrology. Kent Clark 2. Consult	3
Referrals: Neurology. Gina Ehni MD. Evaluate and treat	1
Referrals: Oncology. James Simmons. Consult	3
Referrals: Psychiatry - Geriatric. Todd Cruise MD. Evaluate and treat	1
<b>Total</b>	<b>11</b>

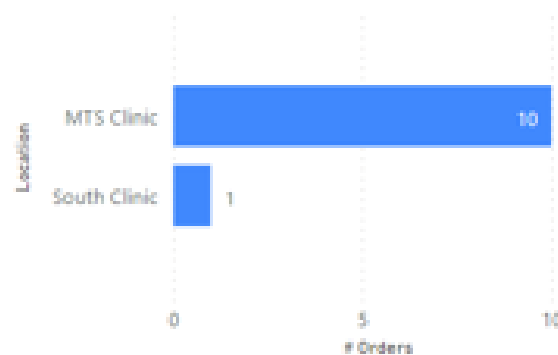
Total Orders by Provider



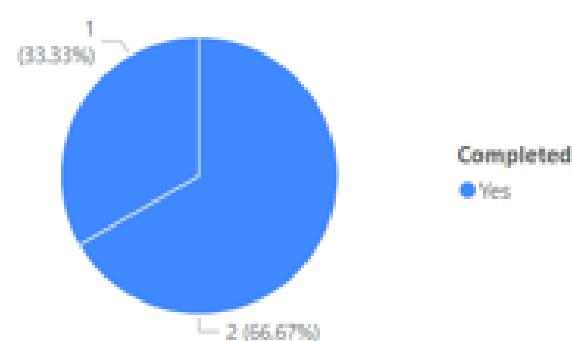
Total Completed by Provider



Total Orders by Location



Total Completed by Location



Created By Completed Totals

Created By	Yes	Total
NextGen Admin	3	3
<b>Total</b>	<b>3</b>	<b>3</b>



# Order Reporting

Raw data page.

## 3: Order Reporting



Order Type: Referral  
MRN #: All  
Location: All  
Provider: All  
Encounter Date: Last 365 Days  
6/7/2022 - 6/7/2022

Person #	MRN	Location	Encounter Date	Provider	Gender	Race	Ethnicity	Language	Age (DOS)	Order
396	000000000339	MTS Clinic	10/12/2022	Grey MD, Merideth	M	White		English	35 - 39	Referrals: Allergy and Immunology. John Andrews MD. Evaluate and treat
402	000000000345	MTS Clinic	12/23/2022	Yang MD, Christina	M	White		English	25 - 29	Referrals: Infectious Disease. Gina Ehni MD. Assume care
48	000000000003	MTS Clinic	6/20/2022	Stevens MD, Isabelle	F	White	Not Hispanic or Latino	English	45 and older	Referrals: Nephrology. Kent Clark 2. Consult
48	000000000003	MTS Clinic	1/9/2023	Weaver, Carrie	F	White	Not Hispanic or Latino	English	45 and older	Referrals: Oncology. James Simmons. Consult
48	000000000016	MTS Clinic	6/20/2022	Stevens MD, Isabelle	F	White	Not Hispanic or Latino	English	45 and older	Referrals: Nephrology. Kent Clark 2. Consult
48	000000000016	MTS Clinic	1/9/2023	Weaver, Carrie	F	White	Not Hispanic or Latino	English	45 and older	Referrals: Oncology. James Simmons. Consult
48	000000000038	MTS Clinic	6/20/2022	Stevens MD, Isabelle	F	White	Not Hispanic or Latino	English	45 and older	Referrals: Nephrology. Kent Clark 2. Consult
48	000000000038	MTS Clinic	1/9/2023	Weaver, Carrie	F	White	Not Hispanic or Latino	English	45 and older	Referrals: Oncology. James Simmons. Consult
398	000000000341	MTS Clinic	10/17/2022	Yang MD, Christina	F	Multi-racial		English	45 and older	Referrals: Psychiatry - Geriatric. Todd Cruise MD. Evaluate and treat
401	000000000344	MTS Clinic	12/13/2022	Grey MD, Merideth	M	Multi-racial		English	20 - 24	Referrals: Neurology. Gina Ehni MD. Evaluate and treat
404	000000000347	South Clinic	1/27/2023	Jones MD, Tom K.	F	Pacific Islander		Test Ticket	25 - 29	Referrals: Cardiac Surgery. Assume care



# Patient Tracking

Utilizing the built in EHR statuses keep track of total appointment time by status.

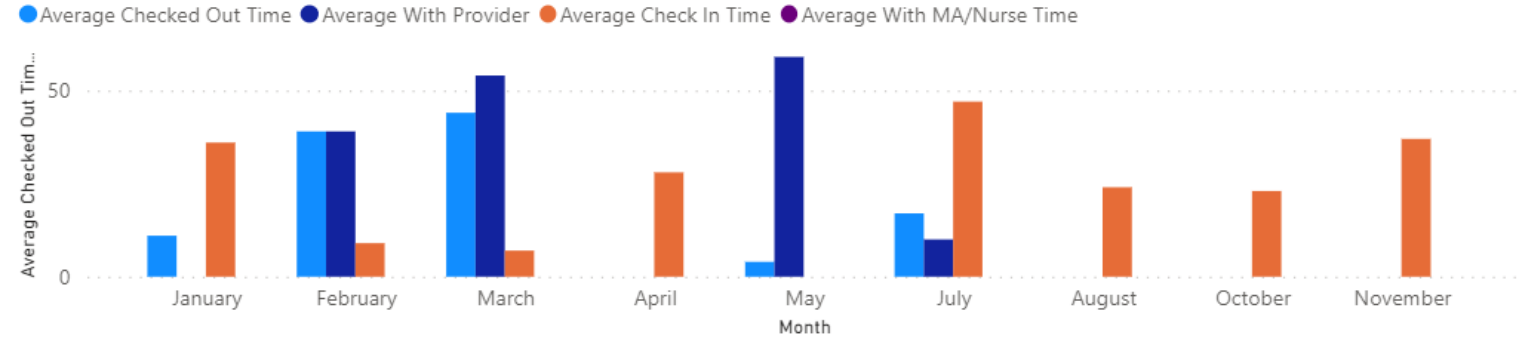


Provider: 
 Location: 
 Encounter #: 
 Person #: 
 Appt Date:  to

## Average Times

Total Appointments	90
Average Check In (Minutes)	9
Average Check Out (Minutes)	14
Average With MA/Nurse (Minutes)	10
Average With Provider (Minutes)	9
Longest MA/Nurse Time (Minutes)	11
Longest Provider Time (Minutes)	28

## Average Times By Appt Date



Person #	Encounter #	Encounter Date	Day of Week	Provider	Location	Booked Time	Kept Time	Waiting For Nurse	With Nursing	Total Time With Nurse	Waiting
385	4951	3/3/2022 6:19:00 AM	Thursday	Yang MD, Christina	*Elk River Office	8:30 AM					
374	4950	3/3/2022 6:18:00 AM	Thursday	Grey MD, Merideth	Mpls Office	9:10 AM	6:18:00 AM				
374	4949	3/3/2022 6:12:34 AM	Thursday	Yang MD, Christina	MTS Clinic	9:10 AM					
387	4948	3/3/2022 6:10:00 AM	Thursday	Grey MD, Merideth	Mpls Office	9:00 AM	6:10:00 AM				
388	4946	3/3/2022 5:19:00 AM	Thursday	Grey MD, Merideth	Mpls Office	8:50 AM	5:20:00 AM				
146	4928	2/17/2022 7:22:36 AM	Thursday	Yang MD, Christina	MTS Clinic	10:35 AM					
387	4927	2/17/2022 5:38:00 AM	Thursday	Grey MD, Merideth	*Elk River Office	2:00 PM	5:38:00 AM				
384	4924	2/17/2022 5:37:00 AM	Thursday	Grey MD, Merideth	*Elk River Office	3:20 PM	5:37:00 AM				
385	4925	2/17/2022 5:37:00 AM	Thursday	Grey MD, Merideth	*Elk River Office	3:10 PM	5:37:00 AM				
386	4926	2/17/2022 5:37:00 AM	Thursday	Grey MD, Merideth	*Elk River Office	2:10 PM	5:37:00 AM				
388	4922	2/17/2022 5:31:00 AM	Thursday	Yang MD, Christina	*Elk River Office	3:00 PM	5:31:00 AM				
388	4916	2/16/2022 10:31:19 AM	Wednesday	Yang MD, Christina	MTS Clinic	10:39 AM					
1	4911	2/16/2022 8:51:00 AM	Wednesday	Grey MD, Merideth	Elk River Office	1:20 PM	8:54:00 AM				
350	4891	1/26/2022 10:18:00 AM	Wednesday	Grey MD, Merideth	Elk River Office	8:30 AM	10:18:00 AM				
<b>Total</b>	<b>333112</b>										<b>18</b>



# Patient Population

Population overview by last encounter date. Displays map with patient city information and UDS details on dots. All blue areas represent 2020 Census data.

## 1: Patient Population

Pages



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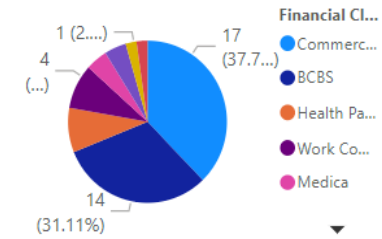
Patient Population

Population Encounter T...

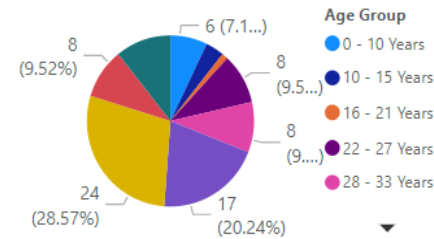
Raw Data

MRN #	Language	Pronoun	Primary Care Phys	Race	Last Encounter Location	Last Encounter Date	
All	English	All	All	All	All	2/1/2019	2/24/2022
Person #	Encounter #	Gender	Specialty	Ethnicity	Age Group	Fin Class	Last Enc Provider
All	All	All	All	All	All	All	All

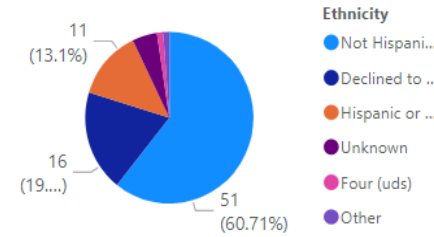
Financial Class



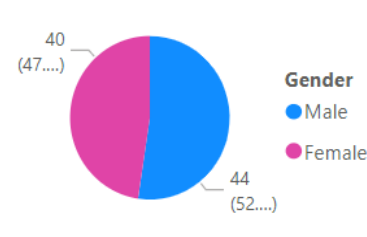
Age Group



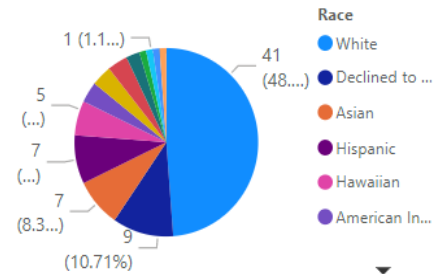
Ethnicity



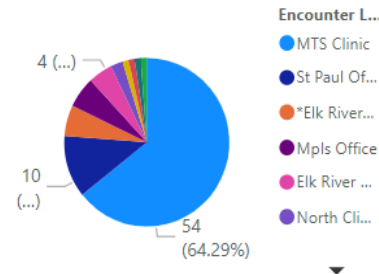
Gender



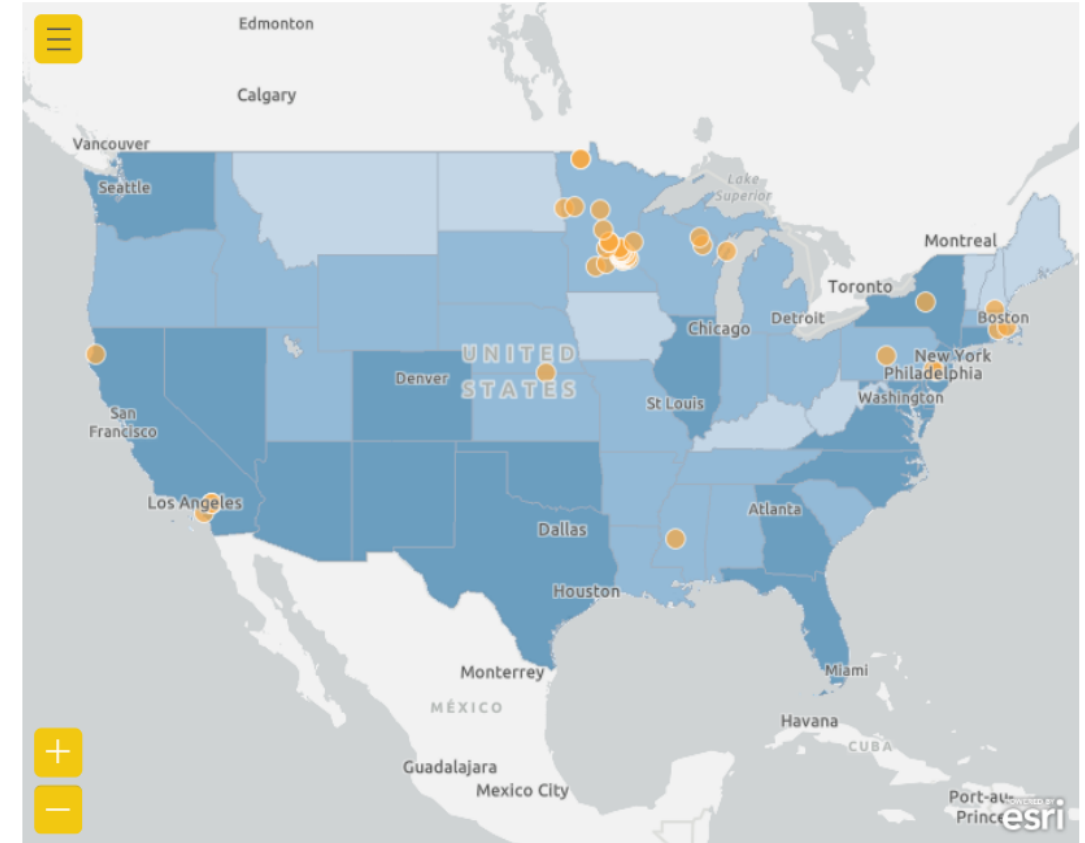
Race



Encounter Location



Patient Population



# Patient Population

Encounter totals with break downs and map view of number of encounters at practice locations.

## 2: Population Encounters

Pages <<
File Export Share Chat in Teams Get insights Subscribe Edit ...
Reset to default Bookmarks View

Patient Population

**Population Encounter ...**

Raw Data

MRN #	Language	Pronoun	Primary Care Phys	Race	Last Encounter Location	Last Encounter Date	
All	English	All	All	All	All	2/1/2019	2/24/2022
Person #	Encounter #	Gender	Specialty	Ethnicity	Age Group	Fin Class	Last Enc Provider
All	All	All	All	All	All	All	All

Location	# of Encounters
*Elk River Office	5
Elk River Office	4
Gina's Radiology	1
Mpls Office	5
MTS Clinic	54
MTS Hospital	1
No Location	1
North Clinic	2
South Clinic	1
St Paul Office	10
<b>Total</b>	<b>84</b>

Age Group	# of Encounters
0 - 10 Years	6
10 - 15 Years	3
16 - 21 Years	1
22 - 27 Years	8
28 - 33 Years	8
34 - 44 Years	17
45 - 55 Years	24
56 - 64 Years	9
<b>Total</b>	<b>84</b>

Ethnicity	# of Encounters
Decline to Specify	16
Hispanic or Latino	11
Not Hispanic or Latino	51
Other	1
<b>Total</b>	<b>84</b>

Race	# of Encounters
White	42
Decline to Specify	9
Black or African American,White	1
Black or African American	3
Asian	7
<b>Total</b>	<b>84</b>

Provider	# of Encounters
Clark, Kent	1
Clark, Kenton PAC	1
Green AC, Jennifer	1
Grey MD, Merideth	56
Jones MD, Tom K	10
Mcgraw PhD, Phil	2
Smith MD, John	1
Stevens MD, Isabelle	2
Weaver MD, Carrie	3
Yang MD, Christina	7
<b>Total</b>	<b>84</b>

Gender	# of Encounters
Female	40
Male	44
<b>Total</b>	<b>84</b>

Financial Class	# of Encounters
BCBS	14
Commercial	17
Health Partners	4
Medica	2
Medicaid	2
Medicare	1
<b>Total</b>	<b>84</b>

# Patient Population

Raw data like how NextGen would display results.

## 3: Raw Data

Pages << File Export Share Chat in Teams Get insights Subscribe Edit ... Reset to default Bookmarks View

Patient Population

Population Encounter T...

Raw Data

MRN #	Language	Pronoun	Primary Care Phys	Race	Last Encounter Location	Last Encounter Date	
All	English	All	All	All	All	2/1/2019 2/24/2021	
Person #	Encounter #	Gender	Specialty	Ethnicity	Age Group	financial_cla...	last_enc_provider
All	All	All	All	All	All	All	All

Person #	MRN #	Age	Age Group	City	County	State	Gender	Ethnicity	Language	Race	Religion
1		77	65 Years +	Minneapolis	HENNEPIN	MIN	M	Not Hispanic or Latino	English	Black or African American	
10	000000000003	23	22 - 27 Years	Minneapolis	HENNEPIN	MIN	F	Not Hispanic or Latino	English	White	
13	000000000005	33	28 - 33 Years	Anoka	ANOKA	MIN	F	Not Hispanic or Latino	English	White	DD89C425-9F48-4FB1-9D93-98E
15	000000000007	50	45 - 55 Years	Anoka	ANOKA	MIN	M	Not Hispanic or Latino	English	White	
16	000000000008	40	34 - 44 Years	Minneapolis	HENNEPIN	MIN	F	Other	English	Asian	
18	000000000009	62	56 - 64 Years	Byron	THAYER	NE	M	Hispanic or Latino	English	Hispanic	
19	000000000010	46	45 - 55 Years	Minneapolis	HENNEPIN	MIN	M	Not Hispanic or Latino	English	White	
21	000000000012	7	0 - 10 Years	Minneapolis	HENNEPIN	MIN	M	Declined to specify	English	Hispanic	
35	000000000025	47	45 - 55 Years	Minneapolis	HENNEPIN	MIN	M	Four (uds)	English	Greek	
39	000000000029	50	45 - 55 Years	Minneapolis	HENNEPIN	MIN	F	Declined to specify	English	White	
40	000000000030	71	65 Years +	Minneapolis	HENNEPIN	MIN	F	Hispanic or Latino	English	White	
51	000000000040	41	34 - 44 Years	Ramsey	ANOKA	MIN	F	Not Hispanic or Latino	English	White	Christian
55	000000000042	27	22 - 27 Years	Minneapolis	HENNEPIN	MIN	F	Not Hispanic or Latino	English	Greek	72523E60-C5FC-4CE1-ACB7-90E
38	000000000043	33	28 - 33 Years	Minneapolis	HENNEPIN	MIN	M	Not Hispanic or Latino	English	White	
53	000000000047	43	34 - 44 Years	Minneapolis	HENNEPIN	MIN	F	Not Hispanic or Latino	English	Hispanic	
58	000000000049	30	28 - 33 Years	Minneapolis	HENNEPIN	MIN	F	Not Hispanic or Latino	English	White	
60	000000000051	19	16 - 21 Years	Minneapolis	HENNEPIN	MIN	M	Not Hispanic or Latino	English		
67	000000000056	66	65 Years +	Franklin	RENVILLE	MIN	M	Not Hispanic or Latino	English	Asian	
68	000000000057	59	56 - 64 Years	West St Paul	DAKOTA	MIN	F	Not Hispanic or Latino	English	Hawaiian	
73	000000000062	71	65 Years +	Saint Paul	RAMSEY	MIN	M	Not Hispanic or Latino	English	American Indian or Alaska Native	
164	000000000097	69	65 Years +	New Auburn	SIBLEY	MIN	F	Not Hispanic or Latino	English	White	
98	000000000099	50	45 - 55 Years	Saint Paul	RAMSEY	MIN	M	Not Hispanic or Latino	English	Hispanic	
133	000000000103	50	45 - 55 Years	Saint Paul	RAMSEY	MIN	F	Not Hispanic or Latino	English	White	
104	000000000104	56	56 - 64 Years	Wabeno	FOREST	WI	F	Not Hispanic or Latino	English	African American, White, Alaskan Native	
196	000000000144	41	34 - 44 Years	Saint Paul	RAMSEY	MIN	F	Not Hispanic or Latino	English	White	

# Provider Approval Queue (PAQ)

Pending PAQ items dashboard.

1: Dashboard



Practice

All

Provider

All

Item Type

All

Date Assigned

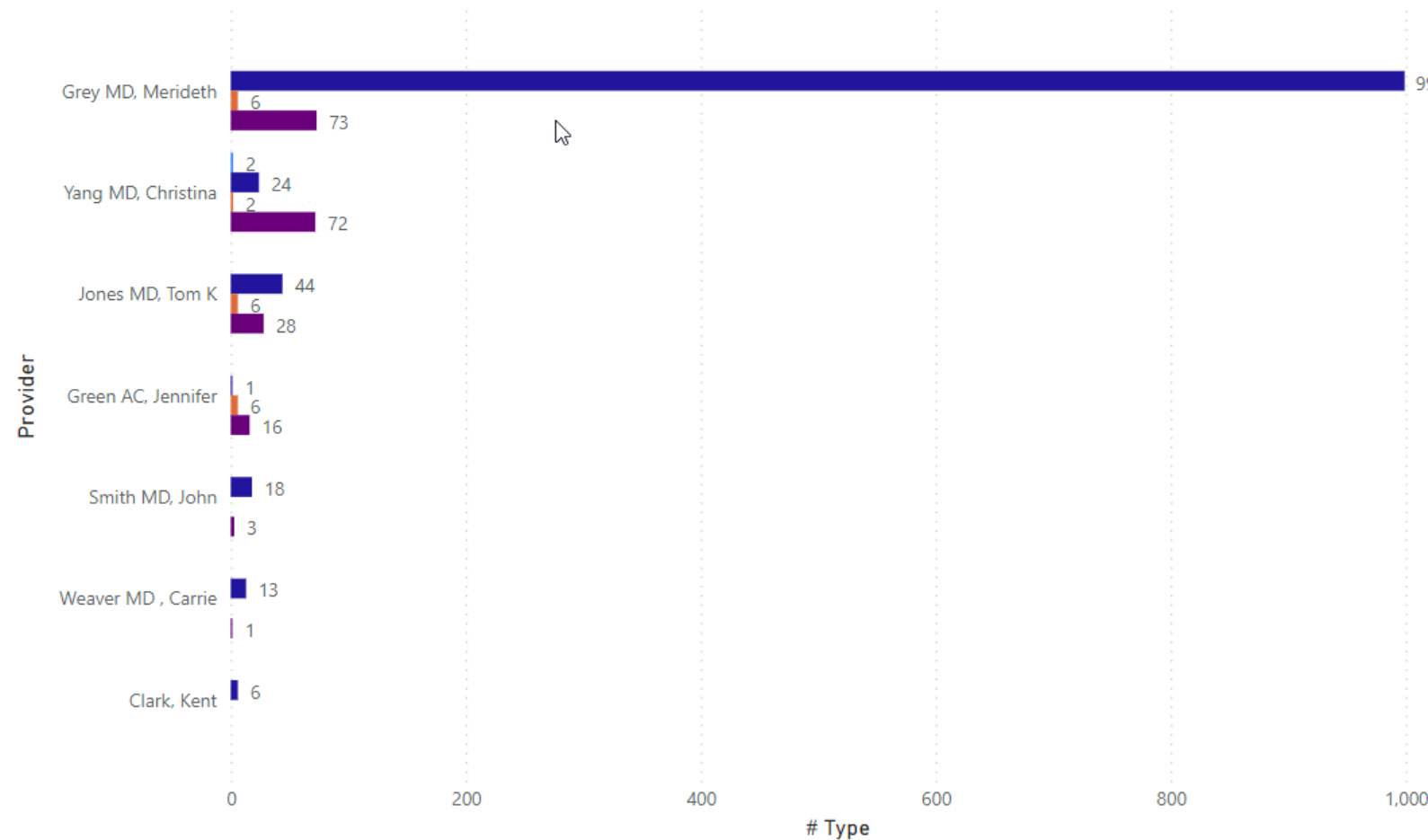
1/1/2020

2/1/2023

# of Pending Items: 1320

# Type by Provider and Type

Type ● DM Image ● Document ● Lab ● Patient Report



Practice	# Items
MTS Clinic	1320
<b>Total</b>	<b>1320</b>

Item Type	# Items
DM Image	2
Document	1105
Lab	20
Patient Report	193
<b>Total</b>	<b>1320</b>



Confidential and Proprietary



# Provider Approval Queue (PAQ)

Pending PAQ Items details.

## 2: Pending Raw Data



Practice: 
Provider: 
Item Type: 
Date Assigned:

# of Pending Items: 1566

Practice	Provider	Person #	MRN #	Encounter #	Encounter Date	PAQ Item Type	PAQ Item	Date Assigned	Created By
MTS Clinic	Smith MD, John	10	000000000003	58	8/21/2008	Lab	CA 19-9	8/21/2008	Michele Roof
MTS Clinic	Smith MD, John	202	000000000154	73	9/8/2008	Document	Master_fm	9/8/2008	Michele Roof
MTS Clinic	Smith MD, John	9	000000000002	74	9/8/2008	Document	Master_fm	9/8/2008	Michele Roof
MTS Clinic	Smith MD, John	9	000000000002	74	9/8/2008	Image	Abdomen	9/8/2008	Michele Roof
MTS Clinic	Smith MD, John	9	000000000002			DM Image	Outside Labs	9/9/2008	Michele Roof
MTS Clinic	Smith MD, John	10	000000000003	76	9/9/2008	DM Image	Outside Labs	9/9/2008	Michele Roof
MTS Clinic	Smith MD, John	20	000000000011			DM Image	Outside Labs	9/9/2008	Michele Roof
MTS Clinic	Smith MD, John	15	000000000007			DM Image	X-Ray	9/9/2008	Michele Roof
MTS Clinic	Smith MD, John	19	000000000010	80	9/10/2008	Image	Untitled	9/10/2008	NextGen Admin
MTS Clinic	Smith MD, John	9	000000000002	88	9/18/2008	Document	uro_patient_plan	9/18/2008	NextGen Admin
MTS Clinic	Jones MD, Tom K	9	000000000002			DM Image	X-Ray	10/24/2008	NextGen Admin
MTS Clinic	Yang MD, Christina	13	000000000005	133	10/22/2008	DM Image	Outside Labs	11/6/2008	NextGen Admin
MTS Clinic	Smith MD, John	13	000000000005	133	10/22/2008	DM Image	Outside Labs	11/6/2008	NextGen Admin
MTS Clinic	Smith MD, John	13	000000000005	133	10/22/2008	DM Image	Outside Labs	11/6/2008	NextGen Admin
MTS Clinic	Smith MD, John	9	000000000002			DM Image	Outside Labs	11/13/2008	NextGen Admin
MTS Clinic	Smith MD, John	19	000000000010	156	12/2/2008	Image	Test	12/2/2008	NextGen Admin
MTS Clinic	Smith MD, John	19	000000000010	156	12/2/2008	Document	oph_ref_fu_itr1	12/4/2008	NextGen Admin
MTS Clinic	Smith MD, John	9	000000000002	168	12/12/2008	Image	Michele	12/12/2008	NextGen Admin
MTS Clinic	Smith MD, John	9	000000000002	168	12/12/2008	Image	Boney	12/12/2008	NextGen Admin
MTS Clinic	Smith MD, John	9	000000000002	168	12/12/2008	Image	Jessie	12/12/2008	NextGen Admin
MTS Clinic	Yang MD, Christina	13	000000000005	173	12/17/2008	Document	nsg_referral_thankyou_itr	12/18/2008	NextGen Admin
MTS Clinic	Yang MD, Christina	13	000000000005	176	12/31/2008	Document	GYN_Master	12/31/2008	Jessica Busch
MTS Clinic	Smith MD, John	20	000000000011	177	1/5/2009	Image	s	1/5/2009	NextGen Admin
MTS Clinic	Smith MD, John	20	000000000011	177	1/5/2009	Image	2	1/5/2009	NextGen Admin
MTS Clinic	Smith MD, John	9	000000000002	200	4/17/2009	Document	srr_flowsheet	4/17/2009	NextGen Admin
MTS Clinic	Smith MD, John	20	000000000011	209	6/30/2009	Document	BG_telephone_call	6/30/2009	NextGen Admin
MTS Clinic	Smith MD, John	11	000000000026	212	7/7/2009	Document	Master_fm	7/7/2009	NextGen Admin
MTS Clinic	Smith MD, John	9	000000000002	213	7/8/2009	Document	work status report	7/8/2009	NextGen Admin

# Provider Approval Queue (PAQ)

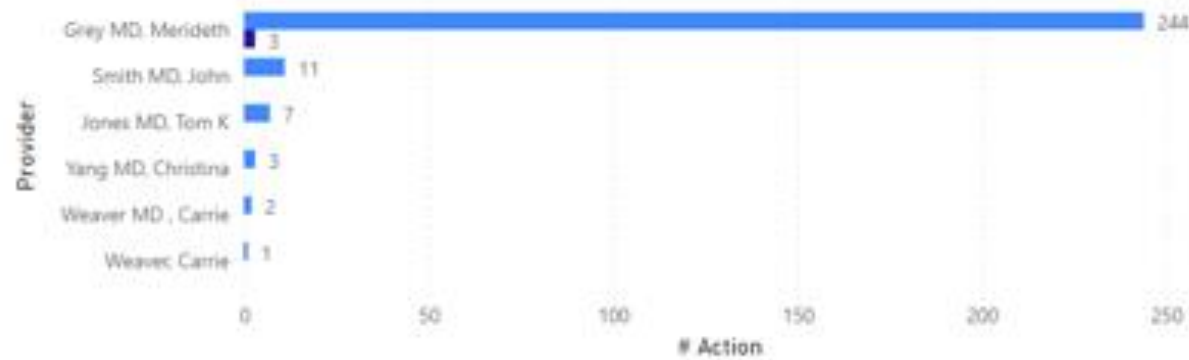
Signed off history overview. Also shows brief overview of pending items.

## 3: Sign Off Dashboard


 Practice: 
 Provider: 
 Item Type: 
 Sign-off Action: 
 Date Assigned:  to

### Provider Sign-off History

Sign-off Action ● Accepted ● Rejected



### Sign-off Totals

Provider	Accepted	Rejected	Total
Grey MD, Merideth	244	3	247
Jones MD, Tom K	7	0	7
Smith MD, John	11	0	11
Weaver MD, Carrie	2	0	2
Weaver, Carrie	1	0	1
Yang MD, Christina	3	0	3
<b>Total</b>	<b>268</b>	<b>3</b>	<b>271</b>

[Go to Pending](#)

### Provider Pending Totals

Provider	# Pending
Grey MD, Merideth	1078
Smith MD, John	190
Jones MD, Tom K	122
Yang MD, Christina	111
Green AC, Jennifer	37
Weaver MD, Carrie	21
Clark, Kent	7
<b>Total</b>	<b>1566</b>

### Sign-off Average

Provider	Average # Days Assigned / Signed
Grey MD, Merideth	134.32
Jones MD, Tom K	0.29
Smith MD, John	120.73
Weaver MD, Carrie	0.00
Weaver, Carrie	0.00
Yang MD, Christina	0.00
<b>Total</b>	<b>127.34</b>

*Values Greater Than 50 Highlighted  
(Only Displays Totals and is not synced to this report  
for more details click the Go to Pending Link)*

# Provider Approval Queue (PAQ)

History raw data.

## 4: Raw Data

Practice  
All

Provider  
All

Item Type  
All

Sign-off Action  
All

Date Assigned  
9/10/2008 1/9/2023

Practice	Location	Provider	Person #	MRN #	Encounter #	Encounter Date	Date Assigned	Sign-off Action	Sign-off User	Sign-off Date	Sign-off Detail
MTS Clinic	MTS Clinic	Clark, Kent	209	000000000161	3544	9/15/2020		Accepted	Preciosa Frank	9/15/2020	Signed-off by Frank, Preciosa
MTS Clinic	MTS Clinic	Clark, Kent	209	000000000161	3544	9/15/2020		Rejected	Preciosa Frank	9/15/2020	Rejected by Frank, Preciosa
MTS Clinic		Grey MD, Merideth	133	000000000103			11/8/2016	Accepted	Merideth Grey MD	11/29/2016	Signed-off by Grey MD, Merideth
MTS Clinic		Grey MD, Merideth	133	000000000103			11/29/2016	Accepted	NextGen Admin	11/30/2016	Signed-off by Admin, NextGen
MTS Clinic		Grey MD, Merideth	20	000000000011			10/20/2008	Accepted	Gina Ehni	1/22/2019	Signed-off by Ehni, Gina
MTS Clinic		Grey MD, Merideth	202	000000000154			4/4/2013	Accepted	Gina Ehni	1/22/2019	Signed-off by Ehni, Gina
MTS Clinic		Grey MD, Merideth	209	000000000161			10/18/2016	Accepted	NextGen Admin	11/28/2016	Signed-off by Admin, NextGen
MTS Clinic		Grey MD, Merideth	209	000000000161			10/18/2016	Accepted	NextGen Admin	10/18/2016	Signed-off by Admin, NextGen
MTS Clinic		Grey MD, Merideth	209	000000000161			6/12/2017	Accepted	Gina Ehni	1/22/2019	Signed-off by Ehni, Gina
MTS Clinic		Grey MD, Merideth	209	000000000161			1/15/2018	Accepted	Gina Ehni	1/22/2019	Signed-off by Ehni, Gina
MTS Clinic		Grey MD, Merideth	222	000000000171			10/18/2016	Accepted	Gina Ehni	10/18/2016	Signed-off by Ehni, Gina
MTS Clinic		Grey MD, Merideth	222	000000000171			10/18/2016	Accepted	NextGen Admin	10/18/2016	Signed-off by Admin, NextGen
MTS Clinic		Grey MD, Merideth	222	000000000171			4/24/2019	Accepted	Gina Ehni	7/10/2019	Signed-off by Ehni, Gina
MTS Clinic		Grey MD, Merideth	314	000000000254			6/12/2017	Accepted	NextGen Admin	6/28/2017	Signed-off by Admin, NextGen
MTS Clinic		Grey MD, Merideth	314	000000000254			6/12/2017	Accepted	Gina Ehni	1/22/2019	Signed-off by Ehni, Gina
MTS Clinic		Grey MD, Merideth	360	000000000302			2/10/2019	Accepted	Gina Ehni	2/10/2019	Signed-off by Ehni, Gina
MTS Clinic		Grey MD, Merideth	360	000000000302			2/10/2019	Accepted	Gina Ehni	2/10/2019	Signed-off by Ehni, Gina
MTS Clinic		Grey MD, Merideth	39	000000000029			2/5/2010	Accepted	Michelle Roof	4/19/2010	Accepted by Roof, Michele
MTS Clinic		Grey MD, Merideth	39	000000000029			4/19/2010	Reassigned	Michelle Roof	4/19/2010	Reassigned to Jones MD, Tom
MTS Clinic		Grey MD, Merideth	48	000000000038			11/30/2020	Accepted	Gina Ehni	11/30/2020	Signed-off by Ehni, Gina
MTS Clinic		Grey MD, Merideth	49	000000000046			7/26/2016	Accepted	NextGen Admin	11/28/2016	Signed-off by Admin, NextGen
MTS Clinic	Elk River Office	Grey MD, Merideth	13	000000000005	178	1/2/2009	1/7/2009	Accepted	Michelle Roof	4/19/2010	Accepted by Roof, Michele
MTS Clinic	Elk River Office	Grey MD, Merideth	19	000000000010	533	7/19/2011	7/19/2011	Accepted	Gina Ehni	1/22/2019	Signed-off by Ehni, Gina
MTS Clinic	Elk River Office	Grey MD, Merideth	202	000000000154	288	10/12/2010	10/12/2010	Accepted	Gina Ehni	1/22/2019	Signed-off by Ehni, Gina
MTS Clinic	Elk River Office	Grey MD, Merideth	209	000000000161	2462	10/18/2016	10/18/2016	Accepted	NextGen Admin	10/18/2016	Signed-off by Admin, NextGen
MTS Clinic	Elk River Office	Grey MD, Merideth	209	000000000161	2462	10/18/2016	11/17/2016	Accepted	Gina Ehni	1/22/2019	Signed-off by Ehni, Gina
MTS Clinic	Elk River Office	Grey MD, Merideth	49	000000000046	2358	7/26/2016	7/26/2016	Accepted	NextGen Admin	11/28/2016	Signed-off by Admin, NextGen
MTS Clinic	Elk River Office	Grey MD, Merideth	49	000000000046	2358	7/26/2016	7/26/2016	Accepted	NextGen Admin	11/28/2016	Signed-off by Admin, NextGen



# User Task Audit

Overview page of pending completed and workgroup tasks.

## 1: Overview

Pages << File Export Share Chat in Teams Get insights Subscribe to report Edit

Med Tech Solutions

Practice: All Created Date: 8/20/2008 5/23/2023 Task Status: All Task Workgroup: All

### Top 25 Sent Tasks Pending

From User	# Sent Tasks Pending
NextGen Admin	252
Kevin Lisman	76
Gina Ehni	36
Merideth Grey MD	32
Susan Fisher	32
Greg Sapecky	30
Michelle Roof	30
Julie Klatt	25
Cynthia Egli	24
Bertha Beta	19
Mary Training	19
Mel Training	19
Michele Roof	19
Nurse Nancy	19
Stephanie Training	19
John Piotrowski	18
Jamie Training	17
Robert Woolley	15
Dee Wernet	14
Jennifer Green AC	8
Tom Jones MD	8
SureScripts Agent	6
Four Training	5
John Smith MD	5
Rosetta Interface	5
<b>Total</b>	<b>752</b>

### Top 25 Users Completed Tasks

Completed By	# Tasks Completed
NextGen Admin	405
Gina Ehni	371
Merideth Grey MD	42
Dee Wernet	27
Kevin Lisman	26
John Smith MD	9
Michele Roof	5
Tom Jones MD	4
Michelle Roof	2
Jamie Training	1
Julie Klatt	1
<b>Total</b>	<b>893</b>

### Tasking Overview

Workgroup	ACCEPTED	ASSIGNED	COMPLETED	PENDING	REJECTED	Total
Business Office		3	1			4
Dee's Group		9	1			10
Gina's Group	1	41	1			43
Kathy's Work Group		1				1
Medical Assistants		2				2
Nursing	2	3	8			13
Tech Team		1				1
UD3 Test Workgroup		3				3
<b>Total</b>	<b>25</b>	<b>345</b>	<b>893</b>	<b>448</b>	<b>1</b>	<b>1712</b>

# User Task Audit

Not completed tasks raw data and tasking details.

## 2: Not Completed Tasks

Pages

File Export Share Chat in Teams Get insights Subscribe to report Edit

Overview

Not Completed Tasks ...

Completed Task Details

Med Tech Solutions

Practice: All Task Workgroup: All Task Created Date: 8/21/2008 5/23/2023 Status: All

### Not Completed Task Details

Person #	Encounter #	Subject	Priority	Status	Task Type	Deleted	Read	Categories	From	Creator	Create Time	Due Date
267	5176	Charge posting failed	HIGH	ASSIGNED	NONE	NO	NO		Preciosa Frank	Preciosa Frank	5/23/2023 2:20:35 PM	5/23/2023 2:20:35 PM
267	5173	New results	HIGH	PENDING	NONE	NO	NO	Lab	Liana Logo	Preciosa Frank	5/22/2023 9:27:01 PM	5/22/2023 9:27:01 PM
267	5173	New results	HIGH	PENDING	NONE	NO	NO	Lab	Tiffany Talarico	Preciosa Frank	5/22/2023 9:27:01 PM	5/22/2023 9:27:01 PM
264	5147	Downtime Item Added	NORMAL	ASSIGNED	NONE	NO	NO		Kevin Lisman	Kevin Lisman	1/31/2023 3:10:22 PM	1/31/2023 3:10:22 PM
404	5146	Charge posting failed	HIGH	ASSIGNED	NONE	NO	READ		NextGen Admin	NextGen Admin	1/30/2023 7:08:02 AM	1/30/2023 7:08:02 AM
264	5110	New results	HIGH	PENDING	NONE	NO	NO	Lab	Bertha Beta	NextGen Admin	1/13/2023 3:12:32 PM	1/13/2023 3:12:32 PM
264	5110	New results	HIGH	PENDING	NONE	NO	NO	Lab	Gina Ehrli	NextGen Admin	1/13/2023 3:12:32 PM	1/13/2023 3:12:32 PM
264	5110	New results	HIGH	PENDING	NONE	NO	NO	Lab	Greg Sapecky	NextGen Admin	1/13/2023 3:12:32 PM	1/13/2023 3:12:32 PM
264	5110	New results	HIGH	PENDING	NONE	NO	NO	Lab	Jamie Training	NextGen Admin	1/13/2023 3:12:32 PM	1/13/2023 3:12:32 PM
264	5110	New results	HIGH	PENDING	NONE	NO	NO	Lab	Julie Klatt	NextGen Admin	1/13/2023 3:12:32 PM	1/13/2023 3:12:32 PM
264	5110	New results	HIGH	PENDING	NONE	NO	NO	Lab	Kevin Lisman	NextGen Admin	1/13/2023 3:12:32 PM	1/13/2023 3:12:32 PM
264	5110	New results	HIGH	PENDING	NONE	NO	NO	Lab	Mary Training	NextGen Admin	1/13/2023 3:12:32 PM	1/13/2023 3:12:32 PM
264	5110	New results	HIGH	PENDING	NONE	NO	NO	Lab	Mel Training	NextGen Admin	1/13/2023 3:12:32 PM	1/13/2023 3:12:32 PM
264	5110	New results	HIGH	PENDING	NONE	NO	NO	Lab	Merideth Grey MD	NextGen Admin	1/13/2023 3:12:32 PM	1/13/2023 3:12:32 PM
264	5110	New results	HIGH	PENDING	NONE	NO	NO	Lab	Michelle Roof	NextGen Admin	1/13/2023 3:12:32 PM	1/13/2023 3:12:32 PM
264	5110	New results	HIGH	PENDING	NONE	NO	NO	Lab	Nurse Nancy	NextGen Admin	1/13/2023 3:12:32 PM	1/13/2023 3:12:32 PM
264	5110	New results	HIGH	PENDING	NONE	NO	NO	Lab	Stephanie Training	NextGen Admin	1/13/2023 3:12:32 PM	1/13/2023 3:12:32 PM
264	5110	New results	HIGH	PENDING	NONE	NO	NO	Lab	Susan Fisher	NextGen Admin	1/13/2023 3:12:32 PM	1/13/2023 3:12:32 PM
264	5110	New results	HIGH	PENDING	NONE	NO	READ	Lab	NextGen Admin	NextGen Admin	1/13/2023 3:12:32 PM	1/13/2023 3:12:32 PM
48			HIGH	PENDING	NONE	NO	NO		Tom Jones MD	Tom Jones MD	1/9/2023 7:04:11 AM	1/9/2023 12:00:00 AM
376	5116	Charge posting failed	HIGH	ASSIGNED	NONE	NO	READ		Robert Woolley	Robert Woolley	12/12/2022 2:28:07 PM	12/12/2022 2:28:07 PM
264	5113	Billing Question	NORMAL	ASSIGNED	NONE	NO	READ	Telephone Call	Kevin Lisman	Kevin Lisman	11/30/2022 9:07:04 AM	11/30/2022 9:07:04 AM
396			HIGH	PENDING	NONE	NO	NO		Kevin Lisman	Kevin Lisman	10/13/2022 1:32:35 PM	10/13/2022 12:00:00 AM
395	5099	Charge posting failed	HIGH	ASSIGNED	NONE	NO	NO		NextGen Admin	NextGen Admin	10/10/2022 12:58:58 PM	10/10/2022 12:00:00 AM
394	5096	New results	HIGH	PENDING	NONE	NO	NO	Lab	Christina Yang MD	NextGen Admin	10/7/2022 10:42:48 AM	10/7/2022 10:42:48 AM
394	5096	New results	HIGH	PENDING	NONE	NO	NO	Lab	Robert Woolley	NextGen Admin	10/7/2022 10:42:48 AM	10/7/2022 10:42:48 AM
364	5170	Charge	NORMAL	ASSIGNED	NONE	NO	NO	Telephone Call	Kevin Lisman	Kevin Lisman	8/16/2023 10:10:50 AM	8/16/2023 12:00:00 AM

# User Task Audit

Completed task raw data details.

## 3: Completed Task Details



Practice

All

Task Workgroup

All

Completed Date

10/23/2008 4/19/2023

Completed By

All

893

Total Completed

### Completed Task Details

Person #	Encounter #	Subject	Priority	Status	Completed By	Completed Date	# Days Accept / Complete	# Hours Accept / Complete
374	5155	New results	HIGH	COMPLETED	NextGen Admin	3/9/2023		
374	5155	New results	HIGH	COMPLETED	NextGen Admin	3/9/2023		
49	2265	Radiology	NORMAL	COMPLETED	NextGen Admin	4/19/2023		
264	5113	New results	HIGH	COMPLETED	Kevin Lisman	11/30/2022		
264	5113	New results	HIGH	COMPLETED	Kevin Lisman	11/30/2022		
264	5113	New results	HIGH	COMPLETED	Kevin Lisman	11/30/2022		
264	5113	New results	HIGH	COMPLETED	Kevin Lisman	11/30/2022		
264	5113	New results	HIGH	COMPLETED	Kevin Lisman	11/30/2022		
264	5113	New results	HIGH	COMPLETED	Kevin Lisman	11/30/2022		
264	5113	New results	HIGH	COMPLETED	Kevin Lisman	11/30/2022		
264	5113	New results	HIGH	COMPLETED	Kevin Lisman	11/30/2022		
264	5113	New results	HIGH	COMPLETED	Kevin Lisman	11/30/2022		
264	5113	New results	HIGH	COMPLETED	Kevin Lisman	11/30/2022		
264	5113	New results	HIGH	COMPLETED	Kevin Lisman	11/30/2022		
264	5113	New results	HIGH	COMPLETED	Kevin Lisman	11/30/2022		
264	5113	New results	HIGH	COMPLETED	Merideth Grey MD	12/20/2022		
398	5105	New results	HIGH	COMPLETED	NextGen Admin	10/17/2022		
398	5105	New results	HIGH	COMPLETED	NextGen Admin	10/17/2022		
397	5104	New results	HIGH	COMPLETED	NextGen Admin	10/14/2022		
397	5104	New results	HIGH	COMPLETED	NextGen Admin	10/14/2022		
374	4936	New results	NORMAL	COMPLETED	John Smith MD	2/28/2022		
374	4936	New results	NORMAL	COMPLETED	John Smith MD	2/28/2022		
374	4936	New results	NORMAL	COMPLETED	John Smith MD	2/28/2022		
374	4936	New results	NORMAL	COMPLETED	John Smith MD	2/28/2022		
374	4936	New results	NORMAL	COMPLETED	John Smith MD	2/28/2022		
374	4936	New results	NORMAL	COMPLETED	John Smith MD	2/28/2022		



# Patient Portal Details

PxP usage report set.

## 1: Overview

Pages

Enrollment Overview

Enrollments

Communications Overview

Communications

CCDA Request Details

Document Request Details

Medication Request Details





# Patient Portal Details

PxP usage report set.

## 2: Enrollments



Practice: 
 Processing Status: 
 Auto Enrollment: 
 Legacy Enrollment: 
 Enrollment Completed Date:  to

Practice	Person #	MRN	Enrollment Status	Processing Status	Error Message	Enrollment Completed Date	Create Date	Created By	Legacy Enrollment	Last Logon Date
MTS Clinic	13	5	Pending	Waiting on Patient			5/4/2023 10:22:05 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	209	161	Registration	Complete		9/1/2022 7:40:21 AM	3/24/2022 1:08:28 PM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	22	13	Pending	Waiting on Patient			10/19/2021 10:15:29 AM	Julie Klatt	No	Friday, November 19, 2021
MTS Clinic	264	201	Registration	Complete		9/22/2022 5:27:08 AM	5/20/2022 1:57:50 PM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	290	315	Registration	Complete		9/17/2022 12:17:03 AM	1/25/2022 9:53:40 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	292	237	Pending	Waiting on Patient			3/17/2023 6:20:15 AM	Kevin Lisman	No	Thursday, August 31, 2023
MTS Clinic	304	246	Pending	Waiting on Patient			3/21/2022 6:44:05 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	313	253	Pending	Waiting on Patient			1/19/2022 9:32:09 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	356	299	Pending	Waiting on Patient			4/14/2022 8:04:24 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	369	312	Registration	Complete		9/22/2022 5:27:08 AM	10/11/2021 7:52:47 AM	Julie Klatt	No	Friday, November 19, 2021
MTS Clinic	374	318	Registration	Complete			9/6/2022 7:46:05 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	375	319	Registration	Complete		3/20/2023 6:51:38 AM	3/17/2023 1:49:40 PM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	376	321	Registration	Complete			9/1/2022 8:10:49 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	388	330	Registration	Complete			9/21/2022 1:33:45 PM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	389	331	Registration	Complete		9/17/2022 12:17:03 AM	3/24/2022 1:15:26 PM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	39	29	Pending	Waiting on Patient			3/21/2022 6:52:57 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	392	335	Pending	Waiting on Patient			9/29/2022 6:49:46 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	393	336	Pending	Waiting on Patient			10/4/2022 11:59:14 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	394	337	Registration	Complete			10/7/2022 10:46:28 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	395	338	Registration	Complete			10/10/2022 1:11:00 PM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	396	339	Registration	Complete			10/12/2022 8:33:48 AM	Kevin Lisman	No	Thursday, August 31, 2023
MTS Clinic	397	340	Registration	Complete			10/14/2022 7:48:49 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	398	341	Registration	Complete		10/18/2022 10:43:05 AM	10/17/2022 2:10:08 PM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	399	342	Registration	Complete			10/28/2022 8:27:01 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	400	343	Registration	Complete			10/28/2022 8:53:24 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	401	344	Registration	Complete			12/13/2022 9:59:32 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	402	345	Registration	Complete			12/23/2022 11:09:40 AM	NextGen Admin	No	Tuesday, August 29, 2023
MTS Clinic	403	346	Registration	Complete			1/18/2023 12:41:39 PM	NextGen Admin	No	Tuesday, August 29, 2023



# Patient Portal Details

PxP usage report set.

## 3: Communications Overview



Practice

All

Read Message

All

Completed

All

Category

All

Create Date

Last 600 Months

11/4/1973 - 11/3/2023



### Total Completed (Accepted)

Accepted Flag	Complete	Not Complete
No		21
Yes	2	3
<b>Total</b>	<b>2</b>	<b>24</b>

### Total Completed (Read)

Message Read	Complete	Not Complete
N	2	24
Y	2	24
<b>Total</b>	<b>2</b>	<b>24</b>

### Total Completed (Location)

Encounter Location	Not Complete
MTS Clinic	23
<b>Total</b>	<b>23</b>

### Total Completed (Sent By)

Sent By	Complete	Not Complete
Person #: 1		1
Person #: 130		1
Person #: 133	1	2
Person #: 18		1
Person #: 209	6	25
Person #: 25		3
Person #: 262		2
Person #: 267	1	1
Person #: 292		1
Person #: 374		6
Person #: 376		2
Person #: 388		2
Person #: 39		1
Person #: 399		1
Person #: 40		1
Person #: 402		1
Person #: 405		1
Person #: 48		18
Person #: 49		1
Person #: 54		1
Person #: 59		1
User: Application PopHealth		13
User: Gina Ehni		6
User: NextGen Admin	1	36
User: Tom Jones MD	1	
<b>Total</b>	<b>10</b>	<b>128</b>

### Total Completed (Accepted By)

Accepted By	Complete	Not Complete	Total
NextGen Admin	1	3	<b>4</b>
Gina Ehni	1		<b>1</b>
<b>Total</b>	<b>2</b>	<b>3</b>	<b>5</b>



# Patient Portal Details

PxP usage report set.

## 4: Communications Detail



Practice: All | Read Message: All | Completed: All | Category: All | Create Date: Last | 1 | Select

No filters applied

Practice	Encounter Location	Encounter Provider	Encounter #	Encounter Date	Communication Category	Source	Subject
MTS Clinic					ATC results		test 7/26
MTS Clinic					Ask a Nurse		test
MTS Clinic					Ask a Nurse		test
MTS Clinic					Ask a Nurse		test2
MTS Clinic					Ask a Nurse		test2
MTS Clinic					Ask a Nurse		testing
MTS Clinic					Ask a Nurse		y
MTS Clinic					Ask a Provider		test
MTS Clinic					Ask a Provider		test
MTS Clinic					Ask a Provider		test
MTS Clinic					Ask a Provider		test 8/1/23
MTS Clinic					Ask a Provider		test2 12/20/22
MTS Clinic					Ask a Provider		test2 12/20/22
MTS Clinic					Ask Liana		hi
MTS Clinic					Ask Robert		testing new ask q
MTS Clinic					Ask Robert		testing new ask q
MTS Clinic					General Medical Questions		test 10 30
MTS Clinic					General Medical Questions		test 10 30
MTS Clinic					General Medical Questions		test 10 30
MTS Clinic					Medication questions		test 10 30
MTS Clinic					Practice Initiated		
MTS Clinic					Private questions (for only a doctor)		test 7/26
MTS Clinic					Records request		test 7/26
MTS Clinic					Records request		test 7/26
MTS Clinic					Records request		test 7/26
MTS Clinic		Grey MD, Merideth	1,074.00	1/10/2013			testing
MTS Clinic		Grey MD, Merideth	1,160.00	3/21/2013			test communication
MTS Clinic		Grey MD, Merideth	1,160.00	3/21/2013			test communication
MTS Clinic	MTS Clinic	Grey MD, Merideth	1,700.00	3/13/2015			test





# Patient Portal Details

PxP usage report set.

## 5: CCDA Request Details



Practice  
All

Processing Status  
All

Provider  
All

Requested Date  
9/1/2022 6/8/2023

ProcessingStatusDesc	Count of person_nbr
Complete	5
Deactivated	656
Deleted	2
Failed	13
Waiting on Patient	4
<b>Total</b>	<b>680</b>

practice_name	Complete	Deactivated	Deleted	Failed	Waiting on Pat
MTS Clinic	5	656	2	13	4
<b>Total</b>	<b>5</b>	<b>656</b>	<b>2</b>	<b>13</b>	<b>4</b>

Create Date  
9/1/2022 6/8/2023

Created By  
All

Practice	MRN	Person #	Encounter #	Processing Status	# Attempts	Create Date	Created By	Interface	Encounter Date	Encounter Provider	Requested Date	CCDA
MTS Clinic	352	408		Deactivated	1	6/8/2023	Portal Admin	PxpLongitudinalCcdaRequest1			6/8/2023	
MTS Clinic	351	407		Deactivated	1	6/8/2023	Portal Admin	PxpLongitudinalCcdaRequest0			6/8/2023	
MTS Clinic	319	375		Deactivated	1	3/17/2023	Portal Admin	PxpLongitudinalCcdaRequest0			3/17/2023	
MTS Clinic	318	374	5155	Failed	1	3/9/2023	NextGen Admin	PxpEncounterCcdaRequest1	3/9/2023	Yang MD, Christina	3/10/2023	
MTS Clinic	318	374	5155	Failed	1	3/9/2023	NextGen Admin	PxpEncounterCcdaRequest7	3/9/2023	Yang MD, Christina	3/10/2023	
MTS Clinic	318	374	5155	Failed	1	3/9/2023	NextGen Admin	PxpEncounterCcdaRequest4	3/9/2023	Yang MD, Christina	3/10/2023	
MTS Clinic	348	405	5149	Failed	1	3/8/2023	NextGen Admin	PxpEncounterCcdaRequest2	2/1/2023	Yang MD, Christina	3/8/2023	
MTS Clinic	348	405	5154	Waiting on Patient	5	3/8/2023	NextGen Admin	PxpEncounterCcdaRequest5	2/14/2023	Yang MD, Christina	3/8/2023	
MTS Clinic	348	405	5153	Waiting on Patient	5	3/8/2023	NextGen Admin	PxpEncounterCcdaRequest2	2/14/2023	Yang MD, Christina	3/8/2023	
MTS Clinic	201	264	5152	Failed	1	3/8/2023	NextGen Admin	PxpEncounterCcdaRequest7	2/3/2023	Clark, Kenton PAC	3/8/2023	
MTS Clinic	201	264	5151	Failed	1	3/8/2023	NextGen Admin	PxpEncounterCcdaRequest6	2/3/2023	Clark, Kenton PAC	3/8/2023	
MTS Clinic	348	405	5150	Failed	1	3/8/2023	NextGen Admin	PxpEncounterCcdaRequest1	2/1/2023	Jones MD, Tom K	3/8/2023	
MTS Clinic	347	404	5148	Failed	1	3/8/2023	NextGen Admin	PxpEncounterCcdaRequest5	2/1/2023	Yang MD, Christina	3/8/2023	
MTS Clinic	201	264	5147	Deactivated	1	3/8/2023	NextGen Admin	PxpEncounterCcdaRequest5	1/31/2023	Jones MD, Tom K	3/8/2023	
MTS Clinic	347	404	5146	Failed	1	3/8/2023	NextGen Admin	PxpEncounterCcdaRequest0	1/30/2023	Yang MD, Christina	3/8/2023	
MTS Clinic	201	264	5144	Failed	2	3/8/2023	NextGen Admin	PxpEncounterCcdaRequest3	1/27/2023	Yang MD, Christina	3/8/2023	
MTS Clinic	347	404	5142	Failed	2	3/8/2023	NextGen Admin	PxpEncounterCcdaRequest3	1/27/2023	Jones MD, Tom K	3/8/2023	
MTS Clinic	339	396	5143	Failed	2	3/8/2023	Kevin Lisman	PxpEncounterCcdaRequest2	1/27/2023	Jones MD, Tom K	3/8/2023	
MTS Clinic	348	405		Complete	1	2/1/2023	Portal Admin	PxpLongitudinalCcdaRequest1			2/1/2023	
MTS Clinic	347	404		Complete	1	1/27/2023	Portal Admin	PxpLongitudinalCcdaRequest0			1/27/2023	





# Patient Portal Details

PxP usage report set.

## 6: Document Request Details



Practice

All

Document

All

Processing Status

All

Create Date

Last 300 Months

11/4/1998 - 11/3/2023

Document	Deactivated	NoPortalCreds
addendum	1	3
APSO Summary	1	1
Dictation	1	
intake_note	1	
Lab_Orders		2
lab_requisition	1	
Letter_Generic		1
MTS Master Im	1	2
OPH_chart_note	1	
Sjogren's Syndrome: Care Instructions		1
SLUMS_Exam_Results		1
<b>Total</b>	<b>7</b>	<b>11</b>

Processing Status # Patients

	6
Deactivated	7
NoPortalCreds	11
<b>Total</b>	<b>24</b>

Practice

MTS Clinic

**Total**

Deactivated NoPortalCreds

7

**7**

11

**11**

Practice	Location	Document Name	Create Date	Created By	Processing Status	MRN	Person #	Encount
MTS Clinic	MTS Clinic	OPH_chart_note	9/8/2022	NextGen Admin	Deactivated	318	374	Grey MD
MTS Clinic	MTS Clinic	MTS Master Im	12/20/2022	Merideth Grey MD	NoPortalCreds	318	374	Yang ME
MTS Clinic	MTS Clinic	MTS Master Im	12/27/2022	NextGen Admin	Deactivated	318	374	Yang ME
MTS Clinic	MTS Clinic	APSO Summary	12/13/2022	Robert Woolley	Deactivated	321	376	Grey MD
MTS Clinic	MTS Clinic	addendum	10/11/2022	Kevin Lisman	Deactivated	330	388	Yang ME
MTS Clinic	MTS Clinic	Dictation	10/11/2022	Kevin Lisman	Deactivated	330	388	Yang ME
MTS Clinic	MTS Clinic	lab_requisition	10/11/2022	Kevin Lisman	Deactivated	330	388	Yang ME
MTS Clinic	MTS Clinic	MTS Master Im	10/10/2022	NextGen Admin	NoPortalCreds	337	394	Yang ME
MTS Clinic	MTS Clinic	addendum	10/12/2022	Kevin Lisman	NoPortalCreds	339	396	Grey MD
MTS Clinic	MTS Clinic	addendum	10/12/2022	Kevin Lisman	NoPortalCreds	339	396	Grey MD
MTS Clinic	MTS Clinic	APSO Summary	10/12/2022	Kevin Lisman	NoPortalCreds	339	396	Grey MD
MTS Clinic	MTS Clinic	MTS Master Im	10/12/2022	Kevin Lisman	NoPortalCreds	339	396	Grey MD
MTS Clinic	MTS Clinic	Lab_Orders	10/13/2022	Kevin Lisman	NoPortalCreds	339	396	Grey MD
MTS Clinic	MTS Clinic	Lab_Orders	10/13/2022	Kevin Lisman	NoPortalCreds	339	396	Grey MD



# Patient Portal Details

PxP usage report set.

## 7: Medication Request Details



Practice

All

Medication

All

Routing Workgroup

All

Requested

Last 5 Years

11/4/2018 - 11/3/2023

### Messages Requested Total

Practice	# Requested
MTS Clinic	1
<b>Total</b>	<b>1</b>

### Medication Requests

Medication	# Requested
Adderall XR 20 mg capsule,extended release	1
<b>Total</b>	<b>1</b>

### Read Messages

Routing Workgroup	Yes	Total
Smith MD. John at MTS Clinic	1	1
<b>Total</b>	<b>1</b>	<b>1</b>

### Top 5 Pharmacies Requested

Practice	Person #	MRN	Request Date	Request Reason	Routing Workgroup	Assigned To	Message Read	Read Date	# Days Request to Read	Response D
MTS Clinic	405	348	5/9/2023	[#1:test]	Smith MD. John at MTS Clinic		Yes	8/29/2023	112	8/29/2023



# Clinical Operations Dashboard

Outstanding items within the EHR.

1: Dashboard



## Clinical Operations

Practice: All

Provider Type: All

Location: All

Date: Last 100 Months

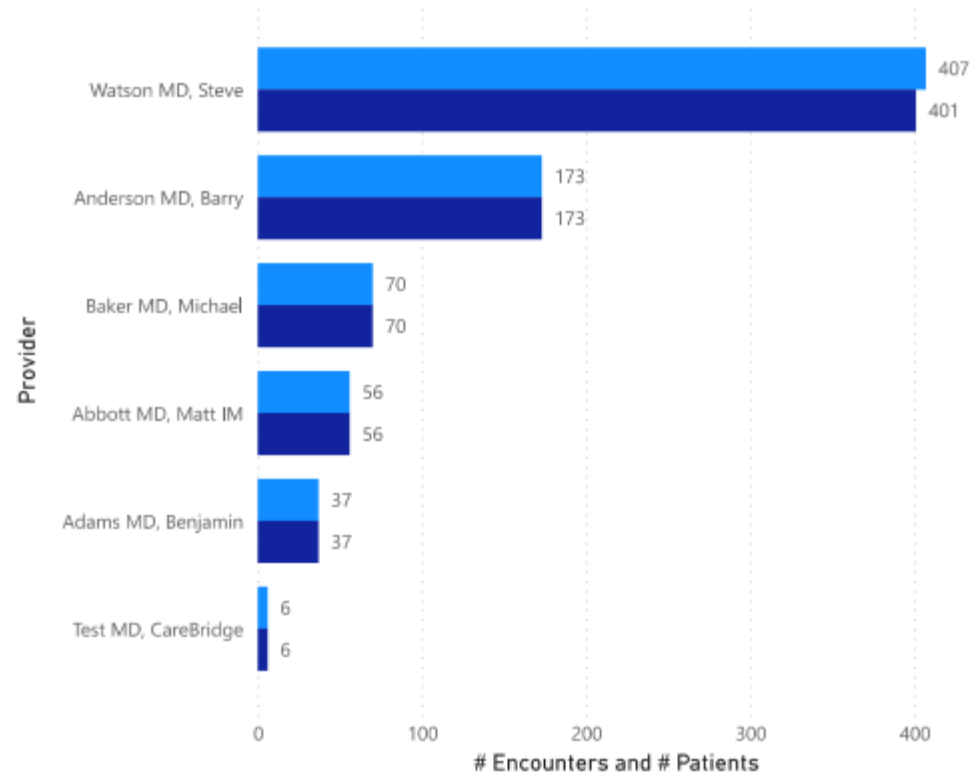
12/18/2015 - 4/17/2024

Provider Filtering Options



### # Encounters and # Patients by Provider

# Encounters # Patients



Open Encounters 674	Avg Days Enc Close 4.08	Pending Notes 672
Pending PAQ 304	PAQ Avg. Days Signoff 310.90	Notes Not Signed 734
% Kept Appointments 99.17%	# Kept Appts 120	% No Show --
Total No Show Appts --	Pending Charges 95	Pending Portal Msgs 2
Practice Pending Tasks 441	Holding Tank Items 16	Unmatched Refills --
Incomplete Orders 215	Due Guidelines 17984	Overdue IAP 10



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# Clinical Operations Dashboard

Outstanding items within the EHR.

## 2: Provider Encounters



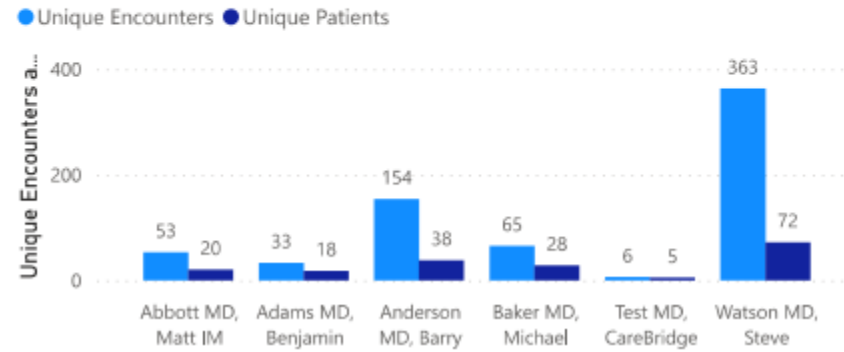
Practice: 
 Provider: 
 Location: 
 Open Encounter: 
 Date:

📅 12/18/2015 - 4/17/2024

### Avg Days Enc. Close by Provider

### Encounters

Unique Encounters and Unique Patients by Provider



Location	Person #	MRN	Encounter #	Encounter Date	Open Encounter	Provider Type	Pro
Downtown Office	1133	32	3230	11/11/2022	Yes	Abt	
Downtown Office	1539	438	3210	10/31/2022	Yes	Abt	
Downtown Office	1548	449	3171	9/21/2022	Yes	Abt	
Downtown Office	1548	449	3623	11/15/2023	Yes	Abt	
Downtown Office	1647	527	3391	4/25/2023	Yes	Abt	
Downtown Office	1657	535	3640	12/4/2023	Yes	Abt	
Downtown Office	1657	535	3641	12/1/2023	Yes	Abt	
Downtown Office	1662	970138	27	12/14/2023	Yes	Abt	
Downtown Office	1662	970138	3064	6/21/2022	Yes	Abt	
Downtown Office	1662	970138	3131	8/15/2022	Yes	Abt	
Downtown Office	1662	970138	3269	12/22/2022	Yes	Abt	
Downtown Office	1662	970138	3289	1/18/2023	Yes	Abt	
Downtown Office	1662	970138	3541	8/28/2023	Yes	Abt	
Downtown Office	1666	543	3238	11/16/2022	Yes	Abt	
Downtown Office	2326	2326	3349	3/10/2023	Yes	Abt	
Downtown Office	2331	2331	3390	4/25/2023	Yes	Abt	
Downtown Office	2333	2333	3554	9/6/2023	Yes	Abt	
Downtown Office	2367	1464	3305	2/3/2023	Yes	Abt	
Downtown Office	2406	1469	3104	7/14/2022	Yes	Abt	
Downtown Office	2406	1469	3577	9/28/2023	Yes	Abt	
Downtown Office	2406	1469	3578	9/28/2023	Yes	Abt	
Downtown Office	2419	1475	3184	9/30/2022	Yes	Abt	
Downtown Office	2419	1475	3205	10/25/2022	Yes	Abt	
Downtown Office	2419	1475	3227	11/10/2022	Yes	Abt	
Downtown Office	2419	1475	3337	2/22/2023	Yes	Abt	
Downtown Office	2419	1475	3348	3/9/2023	Yes	Abt	



# Clinical Operations Dashboard

Outstanding items within the EHR.

## 3: Pending PAQ

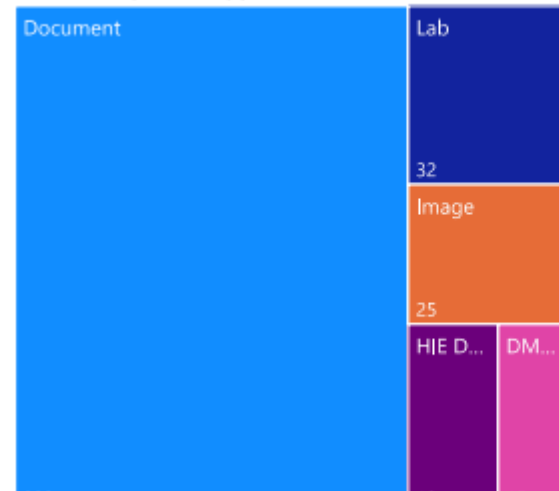


Practice Provider PAQ Item Type Create Date  
 All All All Last 300 Months  
 4/18/1999 - 4/17/2024

### Pending PAQ Totals

Provider	# Pending
Watson MD, Steve	128
Anderson MD, Barry	100
Adams MD, Benjamin	47
Abbott MD, Matt IM	22
Jordan MD, John	8
Test MD, CareBridge	7
Nelson, MD, Brooke	1
<b>Total</b>	<b>313</b>

### # Found by Item Type



### Pending PAQ Items

Person #	MRN	PAQ Item Type	PAQ Item	Create Date	Created By	Encounter #	# Days
1120		Document	Master_Im	10/10/2007	NextGen Admin	107	43
1133	00000000032	Document	CARD_docPIStressEcho	10/12/2007	NextGen Admin	111	43
1523	000000000422	Document	DoctorData	10/16/2007	NextGen Admin	119	43
1523	000000000422	Document	HospitalDischarge	10/16/2007	NextGen Admin	119	43
1523	000000000422	Document	PatientTicket	10/16/2007	NextGen Admin	119	43
1537	000000000436	Document	Master_Im	10/30/2007	10 Workstation	153	42
1532	000000000431	Document	neu_master	10/30/2007	10 Workstation	143	42
1536	000000000435	Document	onc_master	10/30/2007	10 Workstation	151	42
1534	000000000433	Document	sur_master	10/30/2007	10 Workstation	148	42
1539	000000000438	Document	History & Physical	11/4/2007	John Smith MD	201	42
1065	000000028928	Document	Master_Im	11/4/2007	49 Workstation	204	42
1133	00000000032	Document	OPH_historyandphysical	11/4/2007	51 Workstation	228	42
1539	000000000438	Document	PatientTicket	11/4/2007	John Smith MD	201	42
1582	000000000473	Document	Master_Im	3/3/2008	Benjamin Adams MD	428	42
1097	000000106864	Document	Master_Im	11/11/2008	NextGen Admin	444	40
1574	000000000465	Document	intake_note	7/13/2015	Shawna Wilburn	498	22
1542	000000000441	Document	CARD_docPatientTicket	7/17/2015	Holly Bellie	505	22
1542	000000000441	Document	CARD_docReferralThankYou	7/17/2015	Holly Bellie	505	22
1542	000000000441	Document	Return Office Visit	7/17/2015	Holly Bellie	505	22
1573	000000000464	Document	Master_Im	7/22/2015	Shawna Wilburn	510	22
1573	000000000464	Document	Referral	7/22/2015	Shawna Wilburn	510	22
1574	000000000465	DM Image	Referral Report	7/27/2015	Shawna Wilburn		22
1573	000000000464	Document	Chart_Note	9/3/2015	Sheryl Curry-McClain	542	22
1573	000000000464	Document	Referral	9/3/2015	Sheryl Curry-McClain	542	22
1573	000000000464	Document	sur_master	9/3/2015	Sheryl Curry-McClain	542	22
1120		Document	Referral	10/6/2015	Sheryl Curry-McClain	568	22
14	000000000003	Document	Master_Im	10/28/2015	Shawna Wilburn	609	22



# Clinical Operations Dashboard

Outstanding items within the EHR.

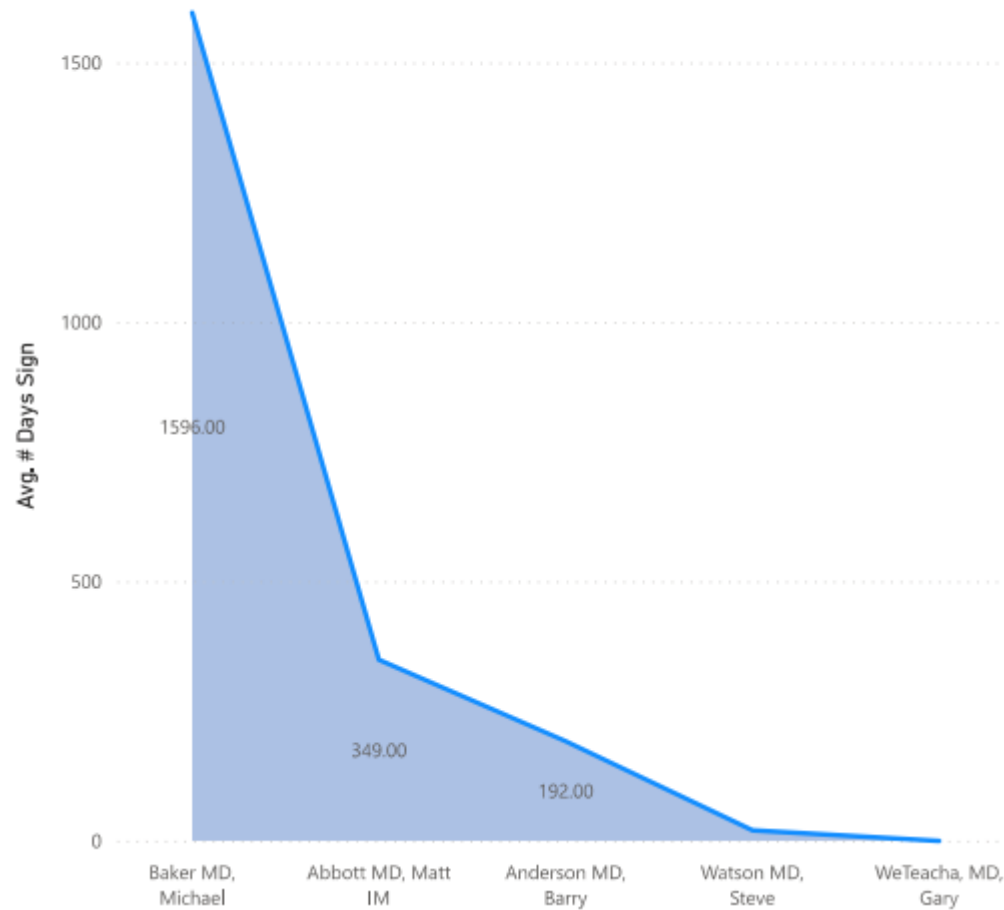
## 4: PAQ Days to Sign



Practice: All | Provider: All | PAQ Item Type: All | Sign-Off Action: All | Date Assigned: Last 300 Months

4/18/1999 - 4/17/2024

### Average # Days for Sign Off



### PAQ Items

Person #	MRN	Encounter #	Encounter Date	Location	PAQ Item Type	PAQ Item
13	28	3601	10/30/2023	Westside Medical Office	Document	Master_I
14	3				DM Image	Cardiolo
1574	465	2123	7/31/2019	CHC Medical	Document	Chart_Nc
1578	470	3656	12/15/2023	Westside Medical Office	Document	Master_I
1655	533	3771	4/8/2024	Westside Medical Office	Document	Master_I
1664	542				DM Image	Lab Resu
2331	2331	3505	8/2/2023	CHC Behavioral Health	Document	Master_I
2367	1464	3305	2/3/2023	CHC Medical	Document	Patient P
2419	1475	3337	2/22/2023	Beach Optical	Image	test imaç
3870	2921	3648	12/13/2023	Westside Medical Office	Document	Master_I
3874	2924	3725	2/20/2024	Westside Medical Office	Document	Master_I



# Clinical Operations Dashboard

Outstanding items within the EHR.

## 5: Appointment Fill Totals



Practice: All
Provider: All
Resource: All
Location: All
Appointment Date: Last 300 Months
4/18/1999 - 4/17/2024

### Appointment Slot Totals

Appt Date	Location	Resource	% Open	% Filled	# Available	# Booked	# Open	# Kept	# Cancelled	# No-Show
4/4/2024	Westside Medical Office	Dr Watson	97.92	2.08	48	1	47			1
4/16/2024	Westside Medical Office	Dr Watson	97.92	2.08	48	1	47		1	
4/11/2024	Westside Medical Office	Dr Watson	93.75	6.25	48	3	45	1		2
4/8/2024	Westside Medical Office	Dr Watson	91.67	8.33	48	4	44	1		3
4/1/2021	Westside Medical Office	Dr Abbott				1		1		
4/5/2021	CHC Behavioral Health	Day Room				1				1
4/5/2021	CHC Behavioral Health	Dr Abbott				1				1
4/5/2021	Downtown Office	Dr Adams				5		5		
4/5/2021	CHC Behavioral Health	Dr Anderson				4		4		
4/6/2021	Downtown Office	Dr Adams				9		4		5
4/6/2021	CHC Medical	Dr Anderson				2		1	1	
4/12/2021	Downtown Office	Dr Adams				2		2		
5/11/2021	Cardiology Clinic	Dr Watson				2				2
5/27/2021	Westside Medical Office	Dr Watson				3		2		1
6/21/2021	CHC Medical	Dr Abbott				1				1
6/24/2021	Westside Medical Office	Dr Watson				2				2
6/29/2021	CHC Medical	Dr Abbott				1		1		
6/30/2021	Downtown Office	Dr Watson				3		2		1
7/13/2021	Samaritan Physicians	Dr Abbott				1				1
7/16/2021	Samaritan Physicians	Dr Abbott				1			1	
7/20/2021	Samaritan Physicians	Dr Abbott				1				1
7/22/2021	Westside Medical Office	Dr Abbott				1			1	
7/23/2021	Downtown Office	Dr Adams				1		1		
7/24/2021	Coastal Internal Medicine	Dr Anderson				1				1
7/26/2021	Coastal Internal Medicine	Dr Anderson				1				1
8/31/2021	CHC Medical	Dr Watson				1				1





# Clinical Operations Dashboard

Outstanding items within the EHR.

## 6: Appointment Fill Details



Practice  
All

Provider  
All

Resource  
All

Location  
All

Appointment Date  
Last 300 Months

4/18/1999 - 4/17/2024

### Appointment Fill Details

Location	Resource	Provider	Appt. Date	Appt. Time	Appt. Hour	Appt. Event	A
CHC Behavioral Health	Day Room		4/5/2021	10:10:00 AM	10 AM	Consult	
Westside Medical Office	Lab Tech		11/10/2022	5:50:00 PM	5 PM	Blood Draw	
CHC Medical	Day Room		11/14/2022	8:30:00 AM	8 AM	OB Follow Up	
Beach Optical	Day Room		1/22/2024	8:00:00 AM	8 AM	Abdominal Ultrasound	
Westside Medical Office	Dr Abbott	Abbott MD, Matt IM	4/1/2021	9:00:00 AM	9 AM	Est Patient F/U	
CHC Behavioral Health	Dr Abbott	Abbott MD, Matt IM	4/5/2021	10:10:00 AM	10 AM	Consult	
CHC Medical	Dr Abbott	Abbott MD, Matt IM	6/21/2021	8:00:00 AM	8 AM	Block	
CHC Medical	Dr Abbott	Abbott MD, Matt IM	6/29/2021	8:00:00 AM	8 AM	Biopsy	
Samaritan Physicians	Dr Abbott	Abbott MD, Matt IM	7/13/2021	8:30:00 AM	8 AM	Consult	
Samaritan Physicians	Dr Abbott	Abbott MD, Matt IM	7/16/2021	8:30:00 AM	8 AM	Block	
Samaritan Physicians	Dr Abbott	Abbott MD, Matt IM	7/20/2021	8:30:00 AM	8 AM	Consult	
Westside Medical Office	Dr Abbott	Abbott MD, Matt IM	7/22/2021	8:30:00 AM	8 AM	New Patient	
CHC Behavioral Health	Dr Abbott	Abbott MD, Matt IM	10/26/2021	8:30:00 AM	8 AM	Consult	
Downtown Office	Dr Abbott	Abbott MD, Matt IM	11/1/2021	8:30:00 AM	8 AM	New Patient	
CHC Medical	Dr Abbott	Abbott MD, Matt IM	11/15/2021	9:10:00 AM	9 AM	Est Patient F/U	
CHC Dental	Dr Abbott	Abbott MD, Matt IM	2/2/2022	10:50:00 AM	10 AM	New Patient	
Downtown Office	Dr Abbott	Abbott MD, Matt IM	3/21/2022	8:50:00 AM	8 AM	Counseling	
Westside Medical Office	Dr Abbott	Abbott MD, Matt IM	7/20/2022	8:40:00 AM	8 AM	Est Patient F/U	
Westside Medical Office	Dr Abbott	Abbott MD, Matt IM	11/10/2022	5:40:00 PM	5 PM	Consult	
Downtown Office	Dr Abbott	Abbott MD, Matt IM	3/13/2023	9:30:00 AM	9 AM	Blood Draw	
Downtown Office	Dr Abbott	Abbott MD, Matt IM	3/20/2023	9:30:00 AM	9 AM	Blood Draw	
Downtown Office	Dr Abbott	Abbott MD, Matt IM	3/20/2023	9:40:00 AM	9 AM	Consult	
Downtown Office	Dr Abbott	Abbott MD, Matt IM	3/27/2023	9:30:00 AM	9 AM	Blood Draw	
Downtown Office	Dr Abbott	Abbott MD, Matt IM	4/3/2023	9:30:00 AM	9 AM	Blood Draw	
Downtown Office	Dr Abbott	Abbott MD, Matt IM	4/10/2023	9:30:00 AM	9 AM	Blood Draw	
Downtown Office	Dr Abbott	Abbott MD, Matt IM	4/17/2023	9:30:00 AM	9 AM	Blood Draw	
Downtown Office	Dr Abbott	Abbott MD, Matt IM	4/24/2023	9:30:00 AM	9 AM	Blood Draw	



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# Clinical Operations Dashboard

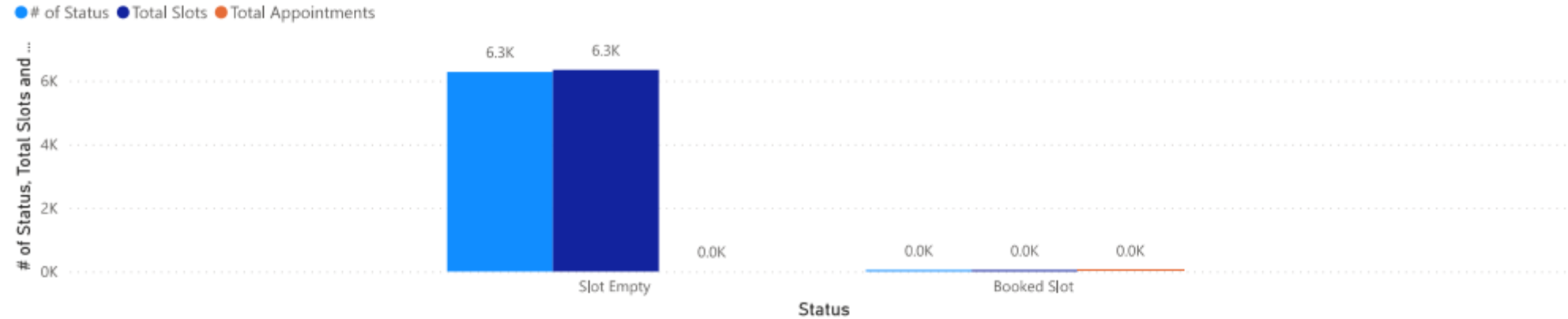
Outstanding items within the EHR.

## 7: Appointment Slot Overview



Practice: All | Provider: All | Resource: All | Location: All | Appointment Date: Next 7 Weeks | 4/17/2024 - 6/4/2024

### # of Status, Total Slots and Total Appointments by Status



### Booked and Unbooked Details

start_date	Appt Time	Slot Status	Resource	Provider	Location	Appt Type	Person #
20240418	8:40:00 AM	Booked Slot	Dr Watson	Watson MD, Steve	Westside Medical Office	BH - Group Sesssion	2427
20240425	8:40:00 AM	Booked Slot	Dr Watson	Watson MD, Steve	Westside Medical Office	BH - Group Sesssion	2427
20240502	8:40:00 AM	Booked Slot	Dr Watson	Watson MD, Steve	Westside Medical Office	BH - Group Sesssion	2427
20240509	8:40:00 AM	Booked Slot	Dr Watson	Watson MD, Steve	Westside Medical Office	BH - Group Sesssion	2427
20240516	8:40:00 AM	Booked Slot	Dr Watson	Watson MD, Steve	Westside Medical Office	BH - Group Sesssion	2427
20240523	8:40:00 AM	Booked Slot	Dr Watson	Watson MD, Steve	Westside Medical Office	BH - Group Sesssion	2427
20240530	8:40:00 AM	Booked Slot	Dr Watson	Watson MD, Steve	Westside Medical Office	BH - Group Sesssion	2427
20240419	8:00:00 AM	Slot Empty	Dr Adams		Westside Medical Office		
20240426	8:00:00 AM	Slot Empty	Dr Adams		Westside Medical Office		
20240503	8:00:00 AM	Slot Empty	Dr Adams		Westside Medical Office		
20240510	8:00:00 AM	Slot Empty	Dr Adams		Westside Medical Office		



Confidential and Proprietary

# Clinical Operations Dashboard

Outstanding items within the EHR.

## 8: Resource Appointments Per Hour



Practice: All | Provider: All | Resource: All | Location: All | Appt. Date: Next 7 Weeks

4/17/2024 - 6/4/2024

### Resource

Appt Hour Resource	8 AM		9 AM		10 AM		11 AM		1 PM		2 PM		3 PM		4 PM	
	Booked	Unbooked	Booked	Unbooked	Booked	Unbooked	Booked	Unbooked	Booked	Unbooked	Booked	Unbooked	Booked	Unbooked	Booked	Unbooked
Dr Abbott		98		203		203		210		105		210		210		210
Dr Adams		126		126		126		84		126		126		126		84
Dr Martin		140		168		168		168		168		168		168		168
Dr Smith		140		140		140		140		105		140		140		140
Dr Watson	7	161		168		168		168		210		210		210		210
<b>Total</b>	<b>7</b>	<b>665</b>		<b>805</b>		<b>805</b>		<b>770</b>		<b>714</b>		<b>854</b>		<b>854</b>		<b>812</b>



# Clinical Operations Dashboard

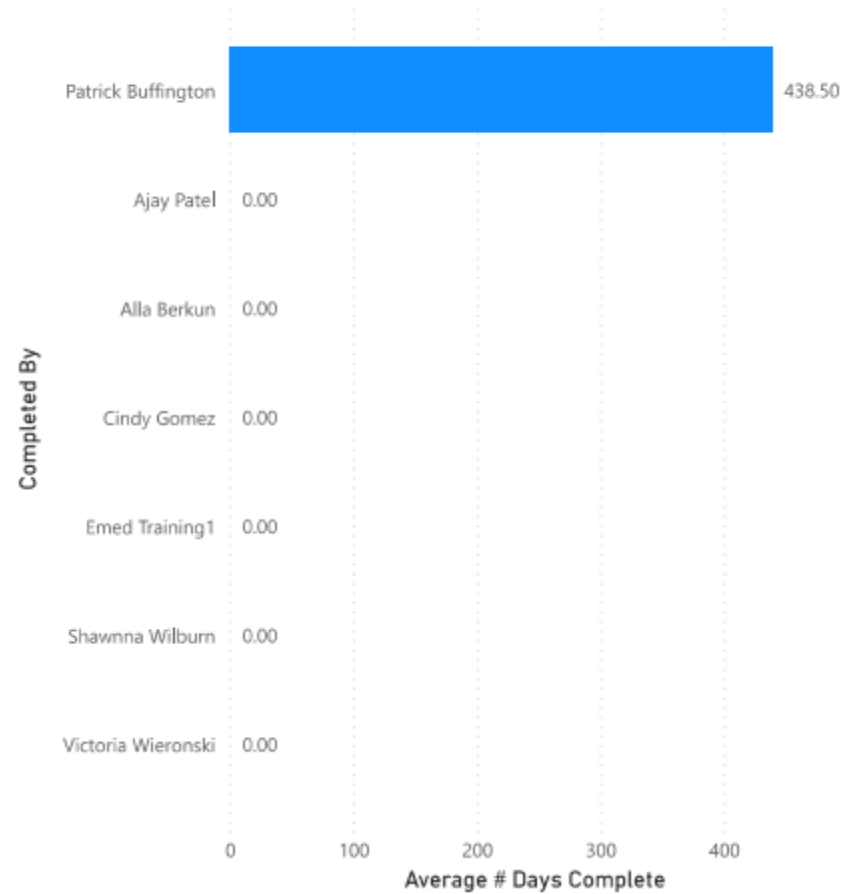
Outstanding items within the EHR.

## 9: Tasking Totals



Practice Provider Location Task Completed By Task Complete Date  
 All All All All Last 300 Months  
 4/18/1999 - 4/17/2024

Average # Days Complete by Completed By



Task Group	ACCEPTED	ASSIGNED	COMPLETED	PENDING	Total
Administration	3	25	4		32
BCBS Billing Staff		2			2
Billers		4			4
EHR Administration		2	3		5
Front Desk		6			6
Lab Techs		1	3		4
Nurses	1	16	1		18
Providers	2				2
Referral Corrdinators	3	2			5
Scheduling		2			2
Training Group	2	1	1		4
Westside Team	2	1			3
<b>Total</b>	<b>22</b>	<b>254</b>	<b>1268</b>	<b>2883</b>	<b>4427</b>



## 10: Tasking Details



Practice Provider Location Assigned Workgroup Task Create Date  
 All All All All Last 300 Months  
 4/18/1999 - 4/17/2024

### Not Completed Task Details

Person #	Encounter #	Subject	Priority	Status	Task Type	Deleted	Read	Categories	From	Creator	Create Time	Due Date
3872			HIGH	ASSIGNED	NONE	NO	NO	HIE Document	Gary Wietecha, MD	Gary Wietecha, MD	4/9/2024 4:15:40 PM	4/9/2024 12
1651	3751	New results	HIGH	PENDING	NONE	NO	NO	HIE Document; Lab	04 Workstation	Victoria Wieronski	3/26/2024 10:28:24 AM	3/26/2024 1
1651	3751	New results	HIGH	PENDING	NONE	NO	NO	HIE Document; Lab	05 Workstation	Victoria Wieronski	3/26/2024 10:28:24 AM	3/26/2024 1
1651	3751	New results	HIGH	PENDING	NONE	NO	NO	HIE Document; Lab	06 Workstation	Victoria Wieronski	3/26/2024 10:28:24 AM	3/26/2024 1
1651	3751	New results	HIGH	PENDING	NONE	NO	NO	HIE Document; Lab	07 Workstation	Victoria Wieronski	3/26/2024 10:28:24 AM	3/26/2024 1
1651	3751	New results	HIGH	PENDING	NONE	NO	NO	HIE Document; Lab	08 Workstation	Victoria Wieronski	3/26/2024 10:28:24 AM	3/26/2024 1
1651	3751	New results	HIGH	PENDING	NONE	NO	NO	HIE Document; Lab	09 Workstation	Victoria Wieronski	3/26/2024 10:28:24 AM	3/26/2024 1
1651	3751	New results	HIGH	PENDING	NONE	NO	NO	HIE Document; Lab	10 Workstation	Victoria Wieronski	3/26/2024 10:28:24 AM	3/26/2024 1
1651	3751	New results	HIGH	PENDING	NONE	NO	NO	HIE Document; Lab	100 Workstation	Victoria Wieronski	3/26/2024 10:28:24 AM	3/26/2024 1
1651	3751	New results	HIGH	PENDING	NONE	NO	NO	HIE Document; Lab	101 Workstation	Victoria Wieronski	3/26/2024 10:28:24 AM	3/26/2024 1
1651	3751	New results	HIGH	PENDING	NONE	NO	NO	HIE Document; Lab	102 Workstation	Victoria Wieronski	3/26/2024 10:28:24 AM	3/26/2024 1
1651	3751	New results	HIGH	PENDING	NONE	NO	NO	HIE Document; Lab	104 Workstation	Victoria Wieronski	3/26/2024 10:28:24 AM	3/26/2024 1

### Completed Task Details - Average Number of Days From Accepted to Completed: 32.15

Person #	Encounter #	Subject	Priority	Status	Completed By	Completed Date	# Days Accept / Complete	# Hours Accept / Complete
1133		Cardio Report Review Needed	NORMAL	COMPLETED	Ajay Patel	1/15/2024 1:41:42 PM		
1115	3481	New results	HIGH	COMPLETED	Dwight Shuler	3/21/2024 6:19:18 AM		
1557	3244	New results	HIGH	COMPLETED	Cindy Gomez	12/15/2022 3:55:14 PM		
1557	3244	New results	HIGH	COMPLETED	Cindy Gomez	12/15/2022 3:55:14 PM		
1557	3244	New results	HIGH	COMPLETED	Cindy Gomez	12/15/2022 3:55:14 PM		
1557	3244	New results	HIGH	COMPLETED	Cindy Gomez	12/15/2022 3:55:14 PM		
1557	3244	New results	HIGH	COMPLETED	Cindy Gomez	12/15/2022 3:55:14 PM		
1557	3244	New results	HIGH	COMPLETED	Cindy Gomez	12/15/2022 3:55:14 PM		
1557	3244	New results	HIGH	COMPLETED	Cindy Gomez	12/15/2022 3:55:14 PM		
1557	3244	New results	HIGH	COMPLETED	Cindy Gomez	12/15/2022 3:55:14 PM		
1557	3244	New results	HIGH	COMPLETED	Cindy Gomez	12/15/2022 3:55:14 PM		
1557	3244	New results	HIGH	COMPLETED	Dwight Shuler	1/13/2023 1:41:45 PM		

# Clinical Operations Dashboard

Outstanding items within the EHR.

## 11: Phone Calls



Practice  
All

Provider  
All

Call Reason Category  
All

Create Date  
Last 300 Months

4/18/1999 - 4/17/2024

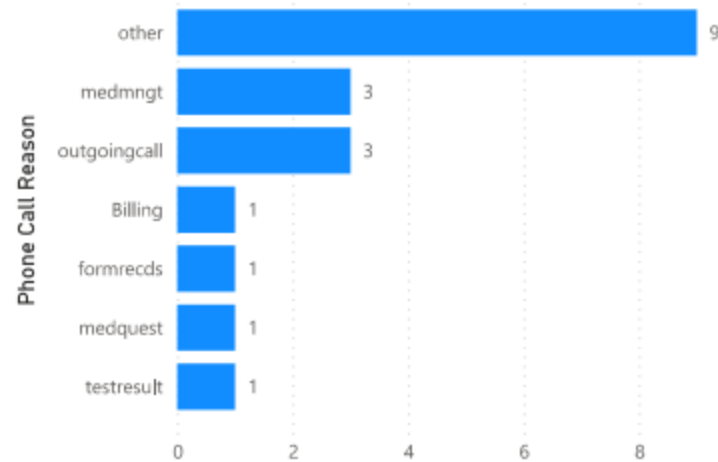
### Patient Phone Calls By Provider

Provider	# Patients Found
Abbott MD, Matt IM	1
Anderson MD, Barry	6
Baker MD, Michael	8
Watson MD, Steve	11
<b>Total</b>	<b>26</b>

### Phone Calls

Provider	Person #	MRN	Create Date	Encounter Date	Ph
Abbott MD, Matt IM	1666	543	11/16/2022 1:49:44 PM	11/16/2022 1:47:34 PM	otf
Anderson MD, Barry	2120	1131	7/11/2023 4:31:25 PM	7/10/2023 3:19:19 PM	me
Anderson MD, Barry	2120	1131	7/11/2023 9:59:42 AM	7/10/2023 3:19:19 PM	otf
Anderson MD, Barry	13	28	8/2/2022 10:30:57 AM	8/2/2022 10:29:19 AM	otf
Anderson MD, Barry	1133	32	6/3/2022 9:58:43 AM	6/2/2022 3:35:41 PM	Bill
Anderson MD, Barry	1133	32	6/3/2022 1:22:23 PM	6/2/2022 3:35:41 PM	Bill
Anderson MD, Barry	1133	32	6/3/2022 10:02:16 AM	6/2/2022 3:35:41 PM	otf
Baker MD, Michael	1133	32	3/16/2023 7:50:14 AM	3/16/2023 7:48:52 AM	otf
Baker MD, Michael	1133	32	3/16/2023 8:06:02 AM	3/16/2023 8:05:30 AM	me
Baker MD, Michael	1557	453	4/5/2022 6:07:06 PM	4/5/2022 6:05:32 PM	me
Baker MD, Michael	1557	453	1/25/2023 12:20:23 PM	1/25/2023 12:16:59 PM	me
Baker MD, Michael	1650	528	6/24/2022 10:50:09 AM	6/24/2022 10:39:41 AM	me
Baker MD, Michael	1655	533	8/16/2022 2:01:25 PM	8/16/2022 1:32:49 PM	otf
Baker MD, Michael	1664	542	7/5/2022 6:32:07 AM	7/5/2022 6:01:54 AM	otf
Baker MD, Michael	1558	551	4/14/2022 11:27:06 AM	4/14/2022 11:11:37 AM	ou
Watson MD, Steve	2406	1469	6/6/2023 1:31:43 PM	6/6/2023 1:30:15 PM	tes
Watson MD, Steve	2419	1475	4/7/2022 1:11:56 PM	4/7/2022 9:13:26 AM	otf
Watson MD, Steve	2419	1475	5/4/2023 7:56:00 PM	5/4/2023 7:53:26 PM	otf
Watson MD, Steve	2434	1487	10/4/2023 3:50:59 PM	10/4/2023 3:44:32 PM	for
Watson MD, Steve	1133	32	3/16/2023 7:45:13 AM	3/14/2023 12:46:23 PM	otf
Watson MD, Steve	1133	32	5/4/2023 7:57:49 PM	5/2/2023 3:37:09 PM	otf
Watson MD, Steve	1133	32	8/22/2023 11:43:02 AM	8/18/2023 8:00:00 AM	otf
Watson MD, Steve	1667	544	11/28/2023 1:04:20 PM	11/28/2023 1:01:19 PM	otf
Watson MD, Steve	1667	544	1/10/2024 3:00:52 PM	1/9/2024 11:14:03 AM	ou
Watson MD, Steve	1668	545	4/14/2022 12:25:03 PM	4/8/2022 11:41:06 AM	otf
Watson MD, Steve	1668	545	10/13/2023 9:33:08 AM	10/10/2023 3:06:14 PM	ou

### # Patients by Phone Call Reason



# Clinical Operations Dashboard

Outstanding items within the EHR.

## 12: Unmatched Refills



Practice: All | Provider: All | Type: All | Create Date: Last 300 Months (4/18/1999 - 4/17/2024)

# Requests by Provider

Unmatched Refills

Provider	MRN	Person #	Type	Create Date
----------	-----	----------	------	-------------

Provider

# Requests by Request Type





# Clinical Operations Dashboard

Outstanding items within the EHR.

## 13: Portal Messages



Practice  
All

Provider  
All

Message Group  
All

User  
All

Create Date  
Last 10 Years

4/18/2014 - 4/17/2024

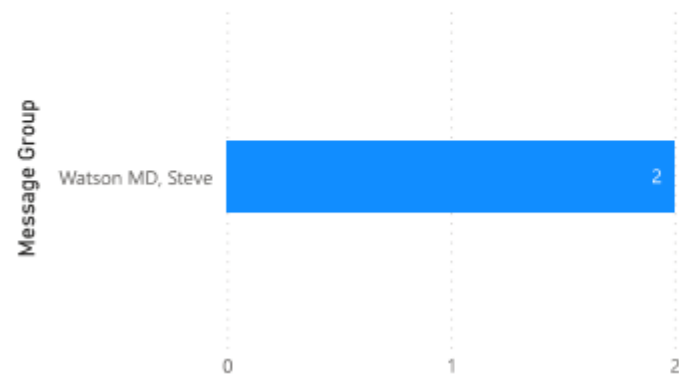
### Group Members

Message Group	User
Watson MD, Steve	NextGen Admin
Watson MD, Steve	Shawna Wilburn
Watson MD, Steve	Watson MD, Steve
Watson MD, Steve	Yvette Bujak

### Messages

Message Group	MRN	Person #	Message Read	No-Reply	Message Category	Message
Watson MD, Steve	1414	2363	No	No	Medication questions	Hello
Watson MD, Steve	1414	2363	No	No	Test results	Can I have m

### Group Counts





# Clinical Operations Dashboard

Outstanding items within the EHR.

15: Orders



Provider  
All

Order Type  
All

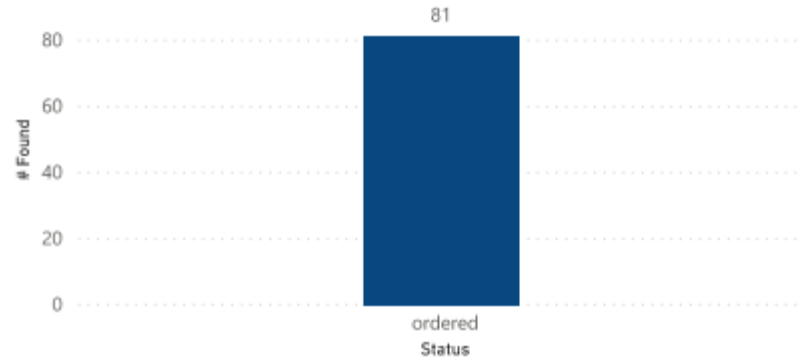
Status  
All

Order Text  
All

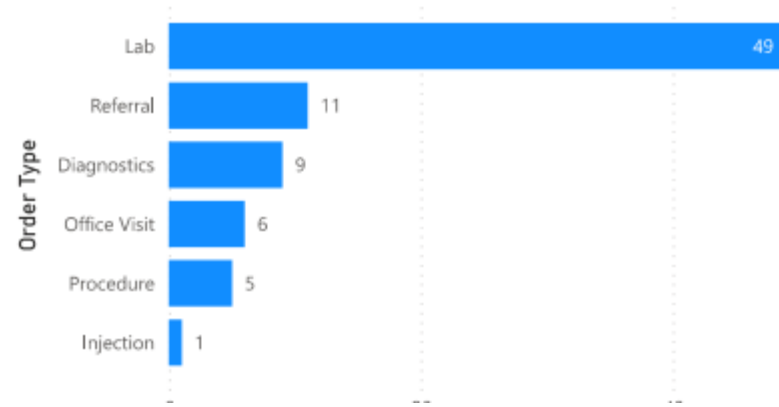
Order Date  
Last 32 Months

8/18/2021 - 4/17/2024

# Found by Status



# Found by Order Type



Order Details

Encounter #	MRN	Person #	Encounter Date	Order Code	Order	Status	N
3007	544	1667	4/6/2022	NG005017	CBC, No Differential/Platelet	ordered	L
3007	544	1667	4/6/2022	NG001453	Hemoglobin A1c	ordered	L
3007	544	1667	4/6/2022	NG717009	Lead, Blood (Pediatric)	ordered	L
3012	545	1668	4/8/2022		Dexter Abigail -Anesthesiology	ordered	R
3027	545	1668	4/20/2022	71250	Chest CT, diagnostic, WITHOUT Contrast	ordered	D
3031	1484	2430	4/27/2022	82962	Glucose blood test	ordered	L
3035	1484	2430	5/3/2022	81000	Urinalysis, non-automated, w/scope	ordered	L
3047	32	1133	6/2/2022		Follow up	ordered	C
3048	32	1133	6/2/2022	NG000201	LIPID PANEL	ordered	L
3055	32	1133	6/14/2022	NG000201	LIPID PANEL	ordered	L
3055	32	1133	6/14/2022	NG996019	Pap, HPV mRNA E6/E7, ThinPrep	ordered	L
3055	32	1133	6/14/2022	NG005199	PROTHROMBIN TIME-INR	ordered	L
3055	32	1133	6/14/2022	NG006197	Rubella Antibodies, IgG	ordered	L
3055	32	1133	6/14/2022	NG004259	TSH	ordered	L
3055	32	1133	6/14/2022	NG008847	Urine Culture, Routine	ordered	L
3061	542	1664	6/21/2022	74263	CT colonography	ordered	D
3061	542	1664	6/21/2022		Follow-up Diabetes mellitus with provider: Abbott MD, Matt IM in 1 Month	ordered	C
3061	542	1664	6/21/2022		Follow-up Diabetes mellitus with provider: Abbott MD, Matt IM in 2 Weeks	ordered	C
3061	542	1664	6/21/2022	NG003376	Glucose, Quantitative, Urine	ordered	L
3061	542	1664	6/21/2022	NG001453	Hemoglobin A1c	ordered	L
3061	542	1664	6/21/2022	NG303756	LIPID PANEL	ordered	L
3066	542	1664	6/22/2022	NG322000	CMP	ordered	L
3066	542	1664	6/22/2022		follow-up visit with Benjamin Adams MD	ordered	C



# Clinical Operations Dashboard

Outstanding items within the EHR.

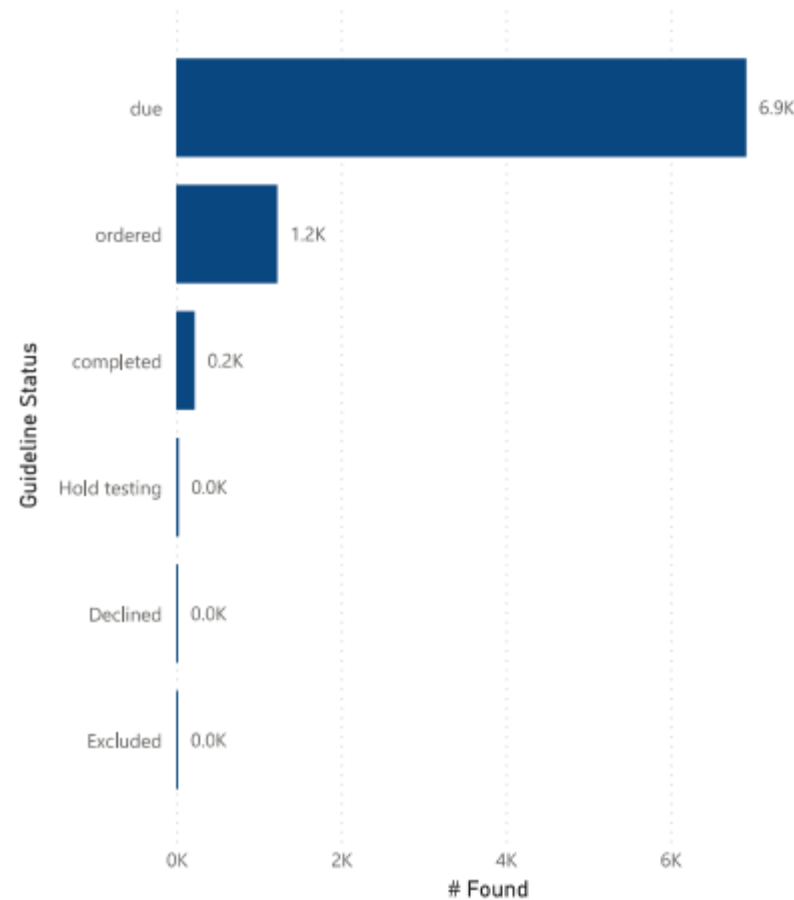
## 16: Care Guidelines



Provider: 
 Guideline Categ...: 
 Guideline Stat...: 
 Guideline: 
 Encounter Date: Last 30 Months

10/18/2021 - 4/17/2024

# Found by Guideline Status



Care Guidelines

Person #	Encounter #	Encounter Date	Encounter Location	Guideline	Guideline Sta
1133	2837	10/21/2021	CHC Medical	Abdominal ultrasound	ordered
1133	2837	10/21/2021	CHC Medical	AEROSOL MASK USED W NEBULIZE	due
1133	2837	10/21/2021	CHC Medical	Allergy	ordered
1133	2837	10/21/2021	CHC Medical	AMB Referral to Allergy	ordered
1133	2837	10/21/2021	CHC Medical	ASCVD 10 year risk	ordered
1133	2837	10/21/2021	CHC Medical	Dental exam	due
1133	2837	10/21/2021	CHC Medical	Depression screening	completed
1133	2837	10/21/2021	CHC Medical	DEXAMETHASONE INHAL SOL CON	due
1133	2837	10/21/2021	CHC Medical	Dilated eye exam	due
1133	2837	10/21/2021	CHC Medical	Drug Abuse Screening Test (DAST)	ordered
1133	2837	10/21/2021	CHC Medical	Foot exam	due
1133	2837	10/21/2021	CHC Medical	GFR	due
1133	2837	10/21/2021	CHC Medical	Hep B (1st)	due
1133	2837	10/21/2021	CHC Medical	Hepatitis C screening	due
1133	2837	10/21/2021	CHC Medical	HPV	due
1133	2837	10/21/2021	CHC Medical	Ophthalmic diagnostic imaging, computer	due
1133	2837	10/21/2021	CHC Medical	Pap/HPV testing	ordered
1133	2837	10/21/2021	CHC Medical	PREDNISONE ORAL	due
1133	2837	10/21/2021	CHC Medical	Unhealthy drug use screening	ordered
1133	2837	10/21/2021	CHC Medical	Urine microalbumin	due
1668	2845	10/26/2021	Cardiology Clinic	CMP	ordered
1668	2845	10/26/2021	Cardiology Clinic	Drug Abuse Screening Test (DAST)	due
1668	2845	10/26/2021	Cardiology Clinic	Hepatitis C screening	due
1668	2845	10/26/2021	Cardiology Clinic	HPV	due
1668	2845	10/26/2021	Cardiology Clinic	Influenza vaccine	due
1668	2845	10/26/2021	Cardiology Clinic	Lipid panel	ordered
1668	2845	10/26/2021	Cardiology Clinic	Ophthalmic diagnostic imaging, computer	ordered



# NextGen Financial Reports

17 Report Packages



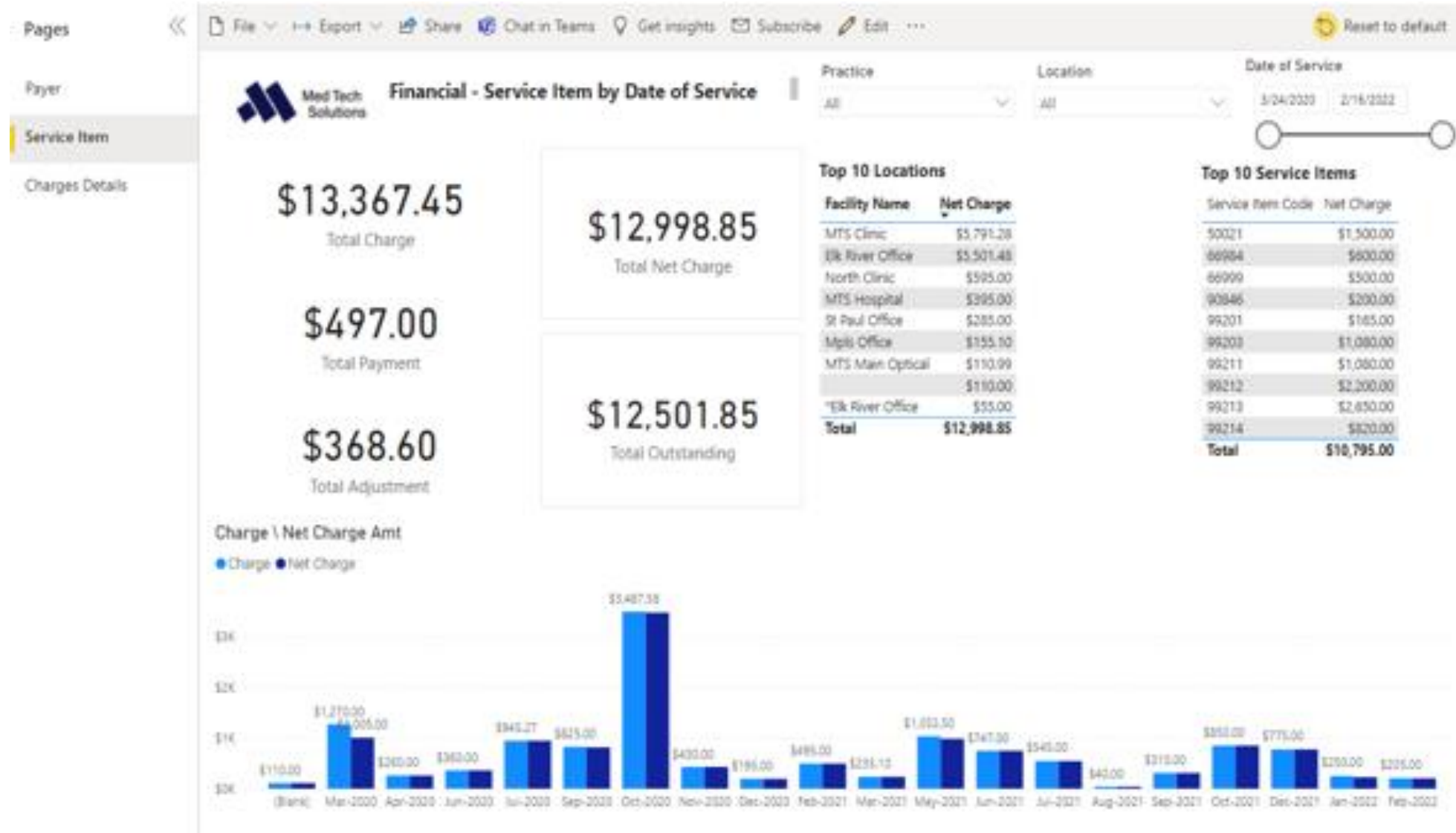




# Accounts Receivable

Service item breakdown with filter options.

## 2: Service Item



# Accounts Receivable

Charges tooltip data.

## 3: Charges Details

Pages



File Export Share Chat in Teams Get insights Subscribe Edit ...

Reset to default Bookmark

Payer

Service Item

Charges Details

### Charge Details

Location	Date of Service	Charge Amt	Adj Amount	Pay Amount	SIM
Elk River Office	3/24/2020	\$155.00	\$155.00	\$0.00	99214TH
Elk River Office	3/26/2020	\$50.00	\$10.00	\$55.00	99001
Elk River Office	3/26/2020	\$150.00	\$0.00	\$165.00	99212
Elk River Office	3/26/2020	\$40.00	\$0.00	\$0.00	V2103
Elk River Office	3/26/2020	\$40.00	\$25.00	\$0.00	V2750
Elk River Office	3/26/2020	\$30.00	\$0.00	\$0.00	V2784
Elk River Office	3/27/2020	\$50.00	\$0.00	\$0.00	99001
Elk River Office	3/27/2020	\$150.00	\$0.00	\$0.00	99212



# AR Aging

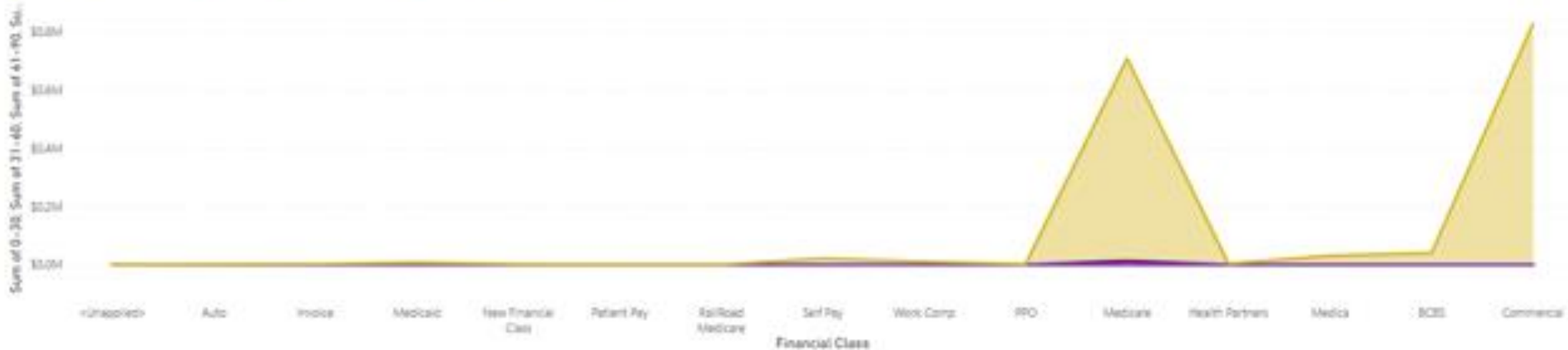
Displays a list of AR data by age and financial class in a dashboard style.

## 1: Financial Class Totals Overview



Sum of 0-30, Sum of 31-60, Sum of 61-90, Sum of 91-120, Sum of 121-150, Sum of 151-180 and Sum of 181-Up by Financial Class

Legend: Sum of 0-30, Sum of 31-60, Sum of 61-90, Sum of 91-120, Sum of 121-150, Sum of 151-180, Sum of 181-Up



# AR Aging

Displays a list of AR data by age and payers in a dashboard style.

## 2: Payers Totals Overview

**AR Aging Totals Overview**

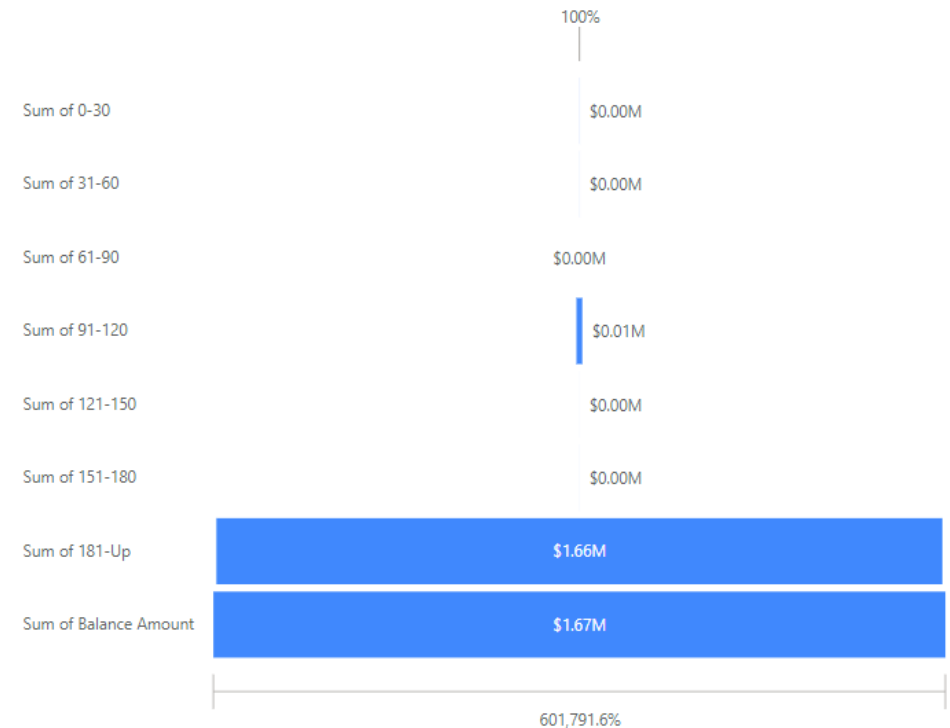
Practice:  Payer:

12/28/2022  
Process Date

**Payer Totals**

Payer	Sum of 0-30	Sum of 31-60	Sum of 61-90	Sum of 91-120	Sum of 121-150	Sum of 151-180	Sum of 181-Up
<Unapplied>	\$574.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
AARP Health Care Options	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$125.00
ABC Ins Copy 2	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$175.00
ABC Insurance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$410.00
Aetna	(\$81.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$23,463.00
Americas Home PPO	(\$25.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,316.00
Auto Geico Insurance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,426.00
Benefit Administrators Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$16.40
Blue Cross Blue Shield	(\$43.00)	\$0.00	\$0.00	\$115.00	\$0.00	\$0.00	\$19,767.50
Blue Cross Blue Shield Federal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,143.00
Blue Cross BlueShield	(\$10.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,408.10
Blue Plus	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,420.70
Champus	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$788,060.00
Comprehensive Care Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$470.00
DONOTUSEBankers Life	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,850.00
Health Partners	(\$42.00)	\$0.00	\$0.00	\$50.00	\$50.00	\$0.00	\$3,453.20
Health Partners MA	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$270.00
Healthcare Partners	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$150.00
Humana Gold Sr Plan	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,097.00
Indian Health Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$30.50
Invoice	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,170.00
Medica	(\$45.00)	\$47.00	\$0.00	\$0.00	\$0.00	\$0.00	\$29,626.00
Medica MA	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$735.00
Medica Sr Plan	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$634.00
Medicare	(\$30.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$701,936.00
Medicare Part A Split Billing	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,600.00
Medicare Part A Testing MPPO	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$325.00
Medicare Part A2 Testing MPPO 2	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$175.00
Medicare Part B Split Billing	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,854.90
MN Medicaid	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,581.60
<b>Total</b>	<b>\$278.00</b>	<b>\$157.00</b>	<b>\$0.00</b>	<b>\$13,305.00</b>	<b>\$50.00</b>	<b>\$82.50</b>	<b>\$1,659,108.00</b>

Sum of 0-30, Sum of 31-60, Sum of 61-90, Sum of 91-120, Sum of 121-150, Sum of 151-180, Sum of 181-Up and Sum of Balance Amount



# AR Aging

Displays a list of AR data by age and locations in a dashboard style.

## 3: Location Totals Overview



### AR Aging Totals Overview

Practice

All

Location

All

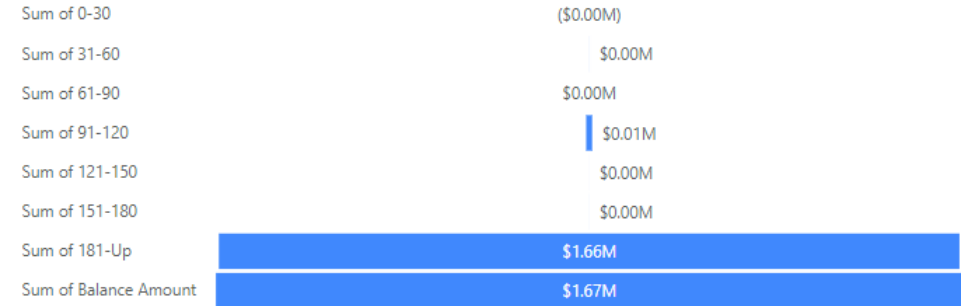
12/28/2022

Process Date

#### Payer Totals

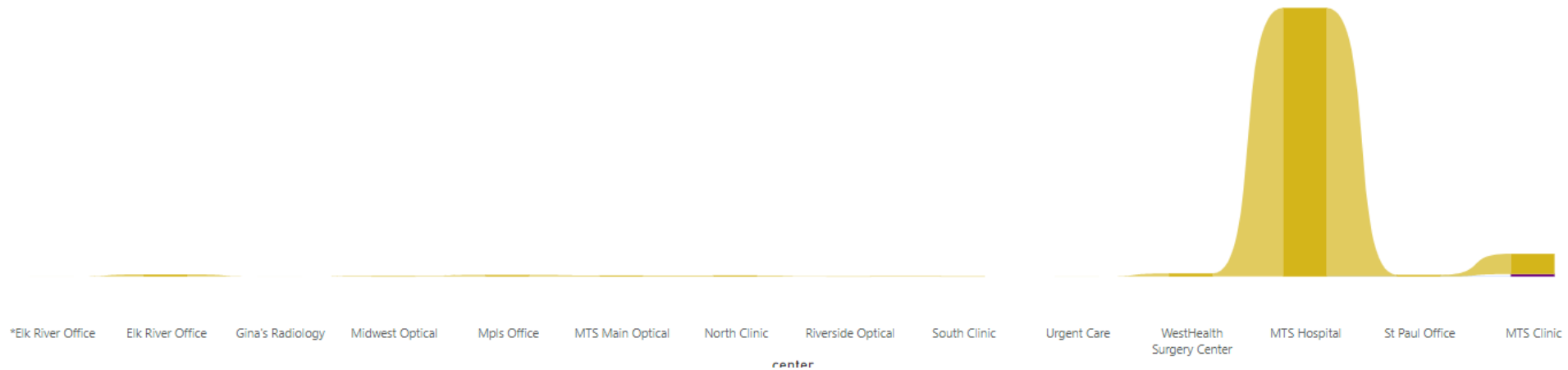
center	Sum of 0-30	Sum of 31-60	Sum of 61-90	Sum of 91-120	Sum of 121-150	Sum of 151-180	Sum of 181-Up
*Elk River Office	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$185.00
Elk River Office	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$11,092.92
Gina's Radiology	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$125.00
Midwest Optical	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,460.71
Mpls Office	\$0.00	\$0.00	\$0.00	\$165.00	\$0.00	\$0.00	\$8,495.10
MTS Clinic	(\$253.00)	\$110.00	\$0.00	\$13,140.00	\$50.00	\$82.50	\$112,066.50
MTS Hospital	(\$20.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,481,793.30
MTS Main Optical	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,573.10
North Clinic	\$0.00	\$47.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,233.00
Riverside Optical	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,790.70
South Clinic	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,002.00
St Paul Office	(\$23.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,993.50
Urgent Care	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$350.00
WestHealth Surgery Center	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$16,947.00
<b>Total</b>	<b>(\$296.00)</b>	<b>\$157.00</b>	<b>\$0.00</b>	<b>\$13,305.00</b>	<b>\$50.00</b>	<b>\$82.50</b>	<b>\$1,659,108.00</b>

Sum of 0-30, Sum of 31-60, Sum of 61-90, Sum of 91-120, Sum of 121-150, Sum of 151-180, Sum of 181-Up and Sum of Balance Amount



Sum of 0-30, Sum of 31-60, Sum of 61-90, Sum of 91-120, Sum of 121-150, Sum of 151-180 and Sum of 181-Up by center

● Sum of 0-30 ● Sum of 31-60 ● Sum of 61-90 ● Sum of 91-120 ● Sum of 121-150 ● Sum of 151-180 ● Sum of 181-Up



# AR Aging

Displays a list of AR data by age and provider in a dashboard style.

## 4: Provider Totals Overview



### AR Aging Totals Overview

Practice

All

Provider

All

12/28/2022

Process Date

#### Payer Totals

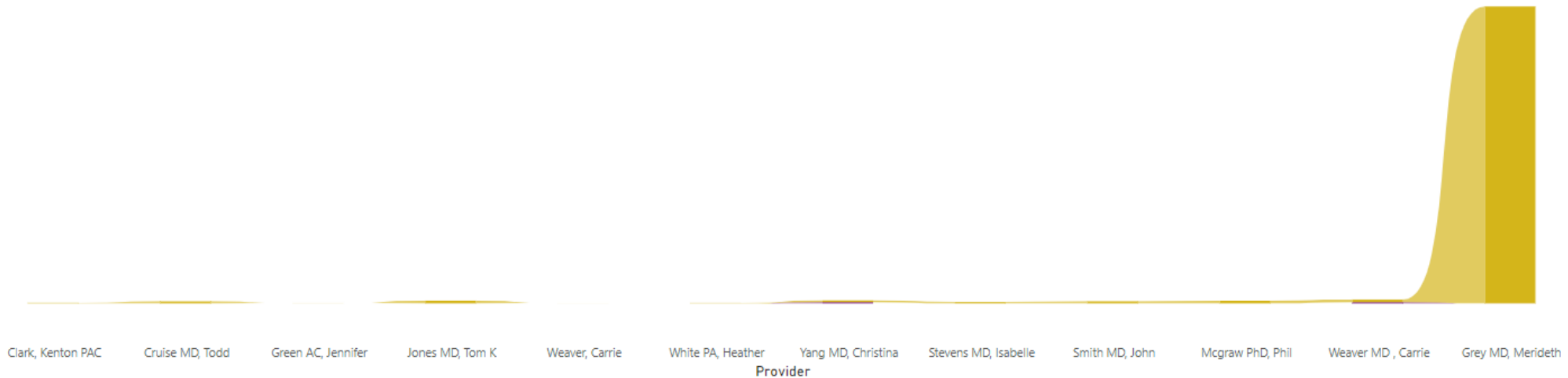
Provider	Sum of 0-30	Sum of 31-60	Sum of 61-90	Sum of 91-120	Sum of 121-150	Sum of 151-180	Sum of 181-Up	Sum
Clark, Kenton PAC	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,532.00	
Cruise MD, Todd	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,484.70	
Green AC, Jennifer	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$555.00	
Grey MD, Merideth	(\$125.00)	\$0.00	\$0.00	\$115.00	\$50.00	\$0.00	\$1,572,808.12	
Jones MD, Tom K	\$0.00	\$157.00	\$0.00	\$0.00	\$0.00	\$0.00	\$14,147.85	
Mcgraw PhD, Phil	(\$65.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$13,989.48	
Smith MD, John	(\$35.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,988.00	
Stevens MD, Isabelle	(\$3.00)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,832.33	
Weaver MD, Carrie	(\$68.00)	\$0.00	\$0.00	\$6,570.00	\$0.00	\$0.00	\$13,823.03	
Weaver, Carrie	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$220.00	
White PA, Heather	\$0.00	\$0.00	\$0.00	\$50.00	\$0.00	\$0.00	\$1,713.00	
Yang MD, Christina	\$0.00	\$0.00	\$0.00	\$6,570.00	\$0.00	\$82.50	\$9,079.52	
<b>Total</b>	<b>(\$296.00)</b>	<b>\$157.00</b>	<b>\$0.00</b>	<b>\$13,305.00</b>	<b>\$50.00</b>	<b>\$82.50</b>	<b>\$1,658,173.03</b>	

Sum of 0-30, Sum of 31-60, Sum of 61-90, Sum of 91-120, Sum of 121-150, Sum of 151-180 and Sum of 181-Up



Sum of 0-30, Sum of 31-60, Sum of 61-90, Sum of 91-120, Sum of 121-150, Sum of 151-180 and Sum of 181-Up by Provider

● Sum of 0-30 ● Sum of 31-60 ● Sum of 61-90 ● Sum of 91-120 ● Sum of 121-150 ● Sum of 151-180 ● Sum of 181-Up





# AR Aging

Raw AR data with filters and exportable data grid.

## 5: Raw Data



Practice: 
 Location: 
 Provider: 
 Financial Class: 
 Payer:

12/28/2022  
Process Date

Practice	Location	DOS	Encounter Date	Last Bill Date	Encounter #	Encounter Status	Financial Class	Payer	Provider	Source T
Ambulatory Surgery Center	Mpls Office		8/8/2011	9/12/2011	2	Billed	Commercial	Aetna	Merideth Grey	Encounte
Ambulatory Surgery Center	Mpls Office		9/8/2011	11/10/2011	15	Billed	Commercial	Preferred One PPO	Merideth Grey	Encounte
Ambulatory Surgery Center	Mpls Office		3/16/2015	3/16/2015	40	Billed	BCBS	Blue Cross Blue Shield	Merideth Grey	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		8/1/2011	9/12/2011	16	Billed	BCBS	Blue Cross Blue Shield	Merideth Grey	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		8/29/2011	9/12/2011	3	Billed	Commercial	Aetna	Christina Yang	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		8/29/2011	11/10/2011	6	Billed	Medicare	Medicare	Merideth Grey	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		9/1/2011	9/2/2011	8	Billed	Commercial	Aetna	Merideth Grey	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		9/1/2011	9/12/2011	4	Rebill	Medica	Medica	Christina Yang	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		9/2/2011	9/2/2011	5	Billed	Medica	Medica	Merideth Grey	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		9/2/2011		7	Unbilled	Medica	Medica Sr Plan	Tom Jones MD	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		9/7/2011	9/12/2011	18	Billed	Commercial	Aetna	Christina Yang	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		9/7/2011	9/7/2011	11	Billed	Commercial	Aetna	Merideth Grey	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		9/8/2011		31	Unbilled	Commercial	Aetna	Tom Jones MD	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		9/8/2011	9/8/2011	13	Billed	Commercial	Preferred One PPO	Merideth Grey	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		9/8/2011	9/8/2011	14	Billed	Commercial	Preferred One PPO	Merideth Grey	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		9/20/2011	9/23/2011	28	Billed	Medica	Medica	Christina Yang	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		10/7/2012	10/10/2012	37	Billed	Medicaid	MN Medicaid	Merideth Grey	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		12/20/2016	12/27/2016	46	Billed	Health Partners	Health Partners MA	Todd Cruise	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		12/27/2016	12/27/2016	45	Billed	BCBS	Blue Cross BlueShield	Merideth Grey	Encounte
Ambulatory Surgery Center	WestHealth Surgery Center		12/27/2016	12/27/2016	44	Billed	Medica	Medica	Merideth Grey	Encounte
MTS Clinic					11		<Unapplied>	<Unapplied>		Account
MTS Clinic					17		<Unapplied>	<Unapplied>		Account
MTS Clinic					13		<Unapplied>	<Unapplied>		Account
MTS Clinic					43		<Unapplied>	<Unapplied>		Account
MTS Clinic					78		<Unapplied>	<Unapplied>		Account
MTS Clinic					141		<Unapplied>	<Unapplied>		Account
<b>Total</b>										



# Charges Details

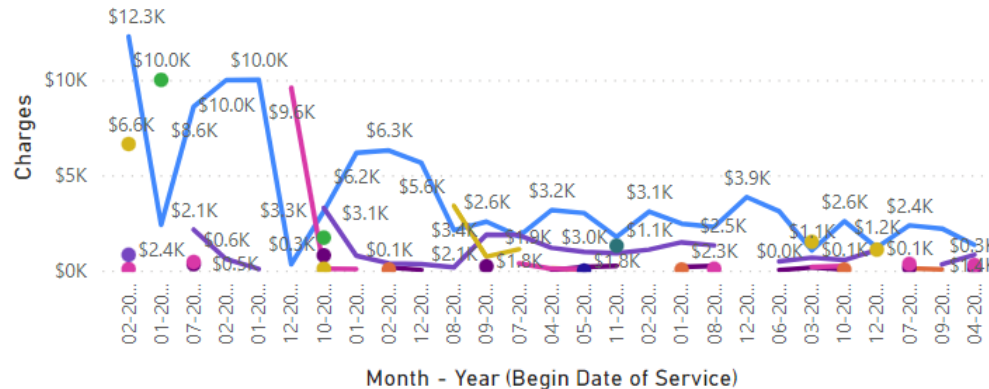
1: Dashboard



Month Year: 
 Date of Service:  
 Fin Class: 
 Location: 
 Department:

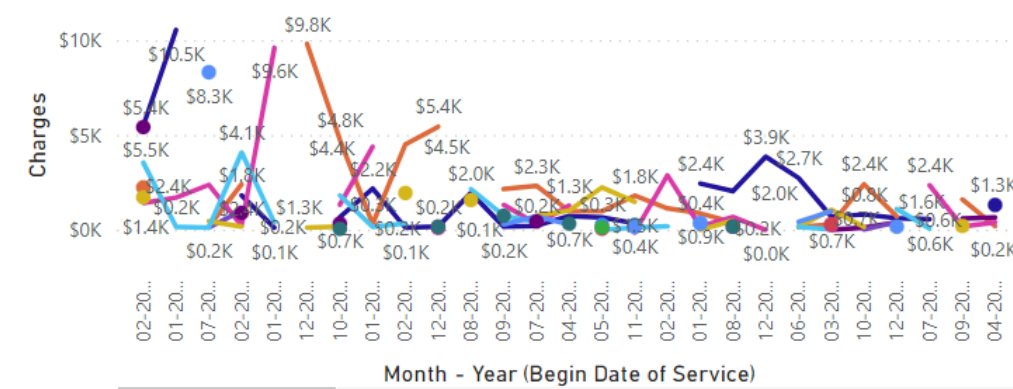
Charges by Month - Year (Begin Date of Service) and Department

Department: (Blank) Admin ... DME Lab Medicar... Office Vi... Optical Pathology



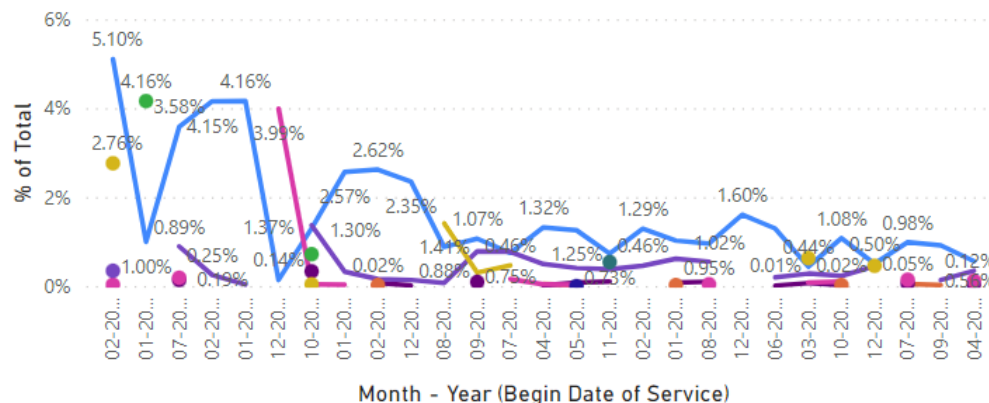
Charges by Month - Year (Begin Date of Service) and Financial Class

Financial Class: Auto BCBS Commercial Health Partners Medica Medicaid Medicare



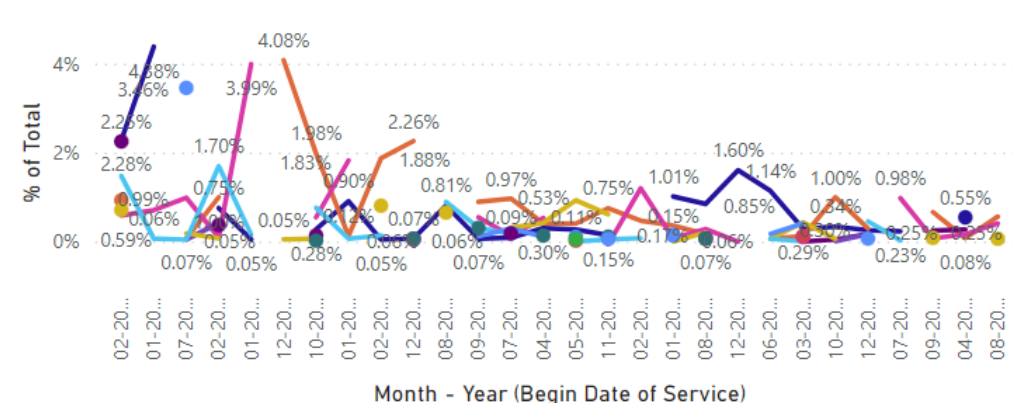
% of Total by Month - Year (Begin Date of Service) and Department

Department: (Blank) Admin ... DME Lab Medicar... Office Vi... Optical Pathology



% of Total by Month - Year (Begin Date of Service) and Financial Class

Financial Class: Auto BCBS Commercial Health Partners Medica Medicaid Medicare



# Charges Details

2: MTD, QTD, YTD Dashboard

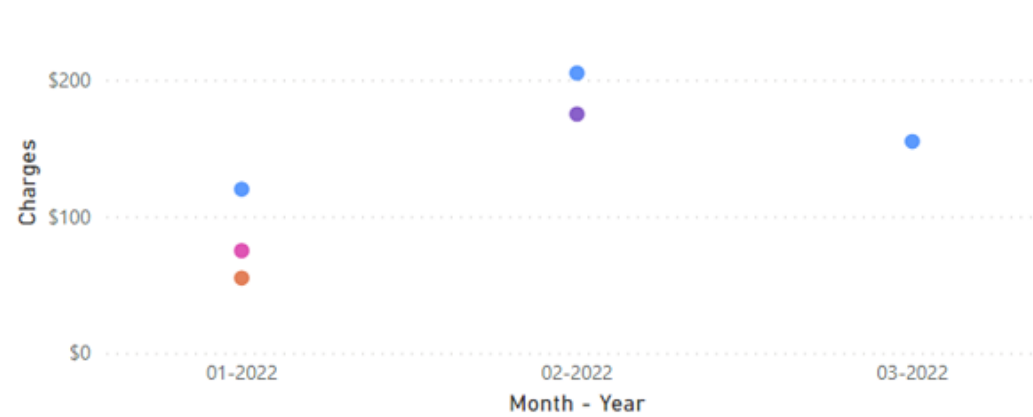
Charges details in dashboard style with buttons to allow filtering directly to show month to date, quarter to date, or year to date charges.



Month To Date    Quarter To Date    **Year To Date**

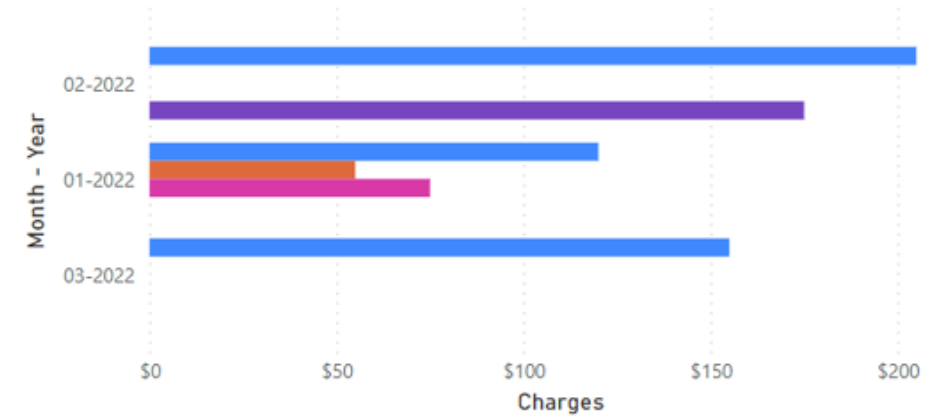
### Charges by Department and Month - Year

Department ● (Blank) ● DME ● Medicare ENC Rate ● Office Visit



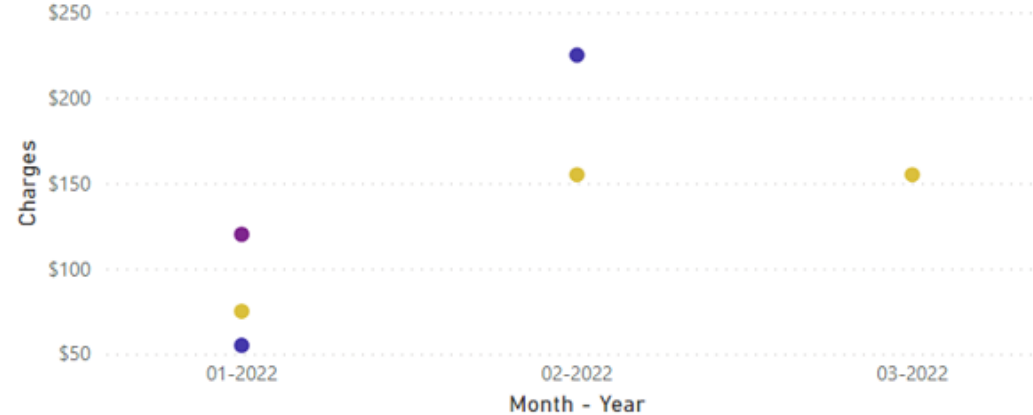
### Charges by Month - Year and Department

Department ● (Blank) ● DME ● Medicare ENC Rate ● Office Visit



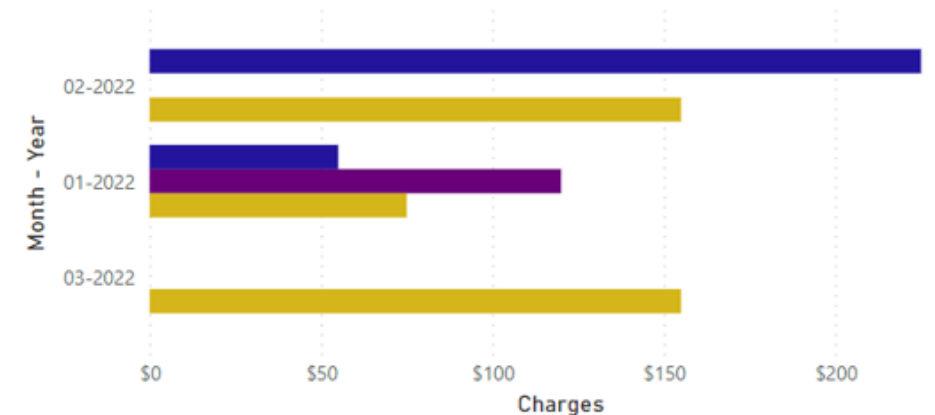
### Charges by Fin Class and Month - Year

Fin Class ● BCBS ● Health Partners ● Medicare



### Charges by Month - Year and Fin Class

Fin Class ● BCBS ● Health Partners ● Medicare



# Charges Details

Overview of charges by date of service.

## 3: Overview



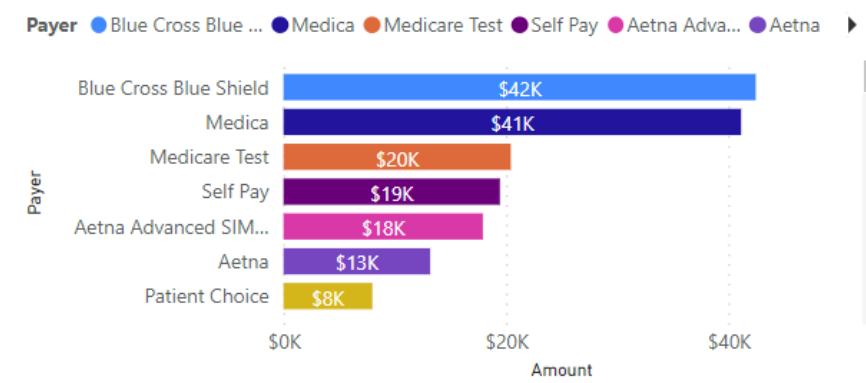
Month Year:   
 Payer: 
 Department: 
 Location: 
 Charge User:

### Gross Charges By Payer

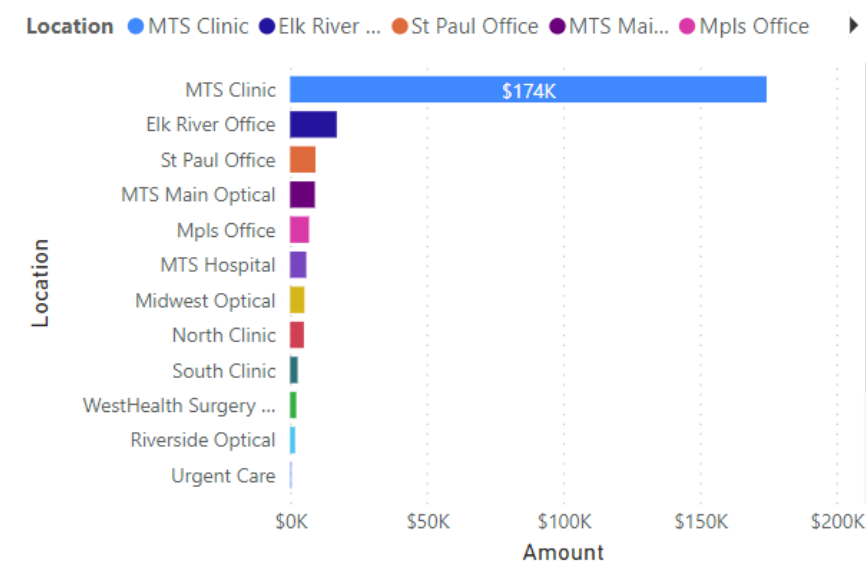
Payer	# of Charges	Amount	% of Total	YTD
Self Pay	304	\$19,448.88	8.09%	19,448.88
Medica	263	\$41,133.48	17.11%	41,133.48
Blue Cross Blue Shield	211	\$42,447.57	17.66%	42,447.57
Medicare Test	186	\$20,430.48	8.50%	20,430.48
Aetna	107	\$13,184.42	5.49%	13,184.42
Aetna Advanced SIM Attached	71	\$17,921.49	7.46%	17,921.49
Health Partners	55	\$6,151.99	2.56%	6,151.99
WC Payer B (Payer Tab Mappings)	38	\$4,551.89	1.89%	4,551.89
Blue Plus	35	\$4,980.71	2.07%	4,980.71
<b>Total</b>	<b>1710</b>	<b>\$240,345.00</b>	<b>100.00%</b>	<b>240,345.00</b>

Date of Service	Location	Dept	Payer	Fin Class	Charge User	SIM
6/1/2014	MTS Clinic	Office Visit	WI MA	Medicaid	Becky Mack	99
3/18/2021	Elk River Office		WI MA	Medicaid	Julie Klatt	J7
6/7/2014	MTS Clinic	Office Visit	WI MA	Medicaid	Kathy Zwach	99
3/3/2014	MTS Clinic	Office Visit	WI MA	Medicaid	NextGen Admin	99
3/18/2014	MTS Clinic	Office Visit	WI MA	Medicaid	NextGen Admin	99
5/29/2014	MTS Clinic	Office Visit	WI MA	Medicaid	NextGen Admin	99
6/1/2014	MTS Clinic	Office Visit	WI MA	Medicaid	NextGen Admin	99
6/2/2014	MTS Clinic	Office Visit	WI MA	Medicaid	NextGen Admin	99
6/4/2014	MTS Clinic	Office Visit	WI MA	Medicaid	NextGen Admin	99
6/5/2014	MTS Clinic	Office Visit	WI MA	Medicaid	NextGen Admin	99
5/15/2014	MTS Clinic	Office Visit	WI MA	Medicaid	NextGen BBP	99
5/22/2014	MTS Clinic	Office Visit	WI MA	Medicaid	NextGen BBP	99
6/6/2014	MTS Clinic	Office Visit	WI MA	Medicaid	NextGen BBP	99
9/1/2021	MTS Clinic	Office Visit	Well Care Of Florida	Commercial	Julie Klatt	99
12/22/2016	MTS Clinic	Office Visit	WC Risk Benefits	Work Comp	Julie Klatt	992
<b>Total</b>						

### Gross Charge Amount By Payer

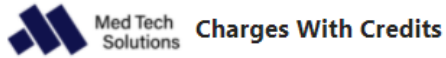


### Gross Charge Amount by Location



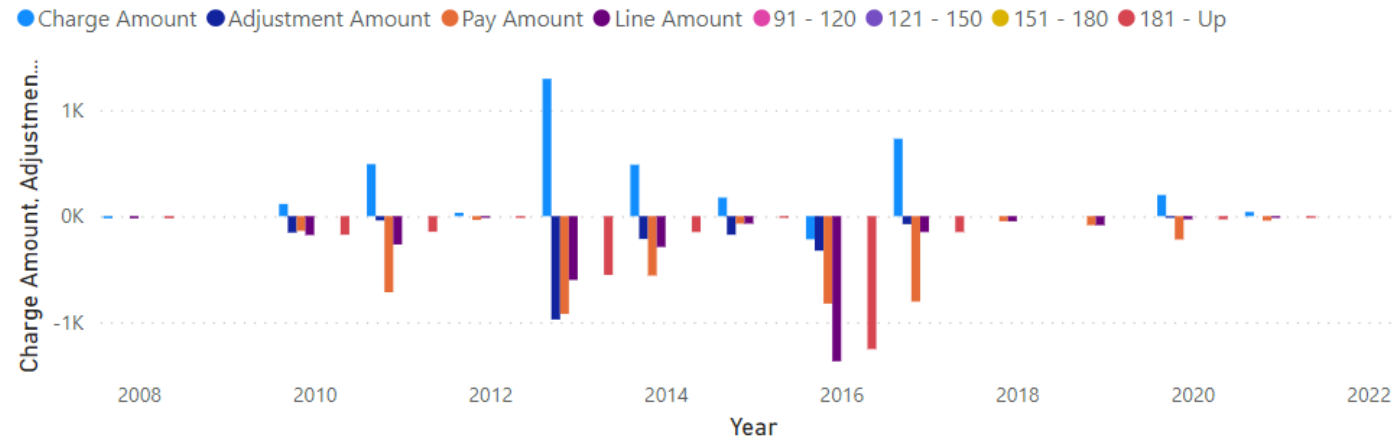
# Charges With Credits

Displays all charges for encounter date range with credit balances. Displays the line-item amount of the charge as well.

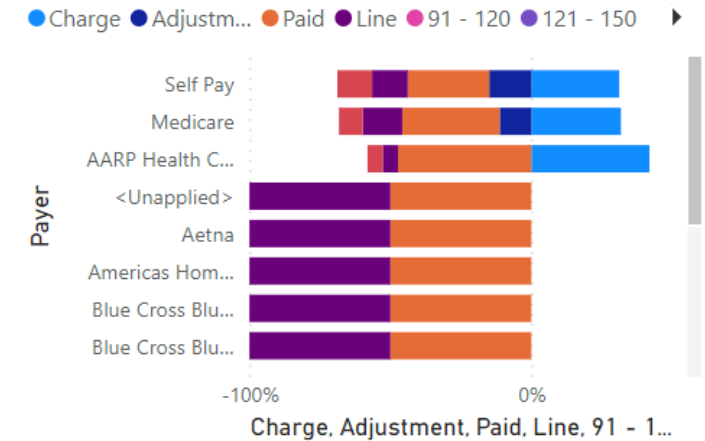


Encounter #  Provider  Payer  Service Item  Encounter Date

## Charges With Credits By Encounter Date



## By Payer



Location	Provider	Encounter Number	Payer Name	Policy Number	Group Number	Date of Service	Se Ite
<Unknown>	<Unapplied>	0	<Unapplied>				
Mpls Office	<Unapplied>	1409	Self Pay				
St Paul Office	<Unapplied>	2000	Self Pay				
MTS Clinic	Carrie Weaver MD	1528	Self Pay			04/23/2014	99.
Elk River Office	Carrie Weaver MD	3482	Self Pay			03/26/2020	99.
Elk River Office	Carrie Weaver MD	3482	Self Pay			03/26/2020	99.
Elk River Office	Christina Yang	751	Self Pay			09/23/2011	99.
Mpls Office	Merideth Grey	29	Self Pay			02/22/2008	99.
MTS Clinic	Merideth Grey	250	Self Pay			04/13/2010	99.
MTS Main Optical	Merideth Grey	1133	Self Pay			02/28/2013	V2
<b>Total</b>							

# Daily Charges

Shows all charges entered on a specific selected date range. Filter for additional charge details desired.

1: Dashboard



## Daily Charges Detail

Practice

All

Location

All

SIM Code

All

Provider

All

Payer

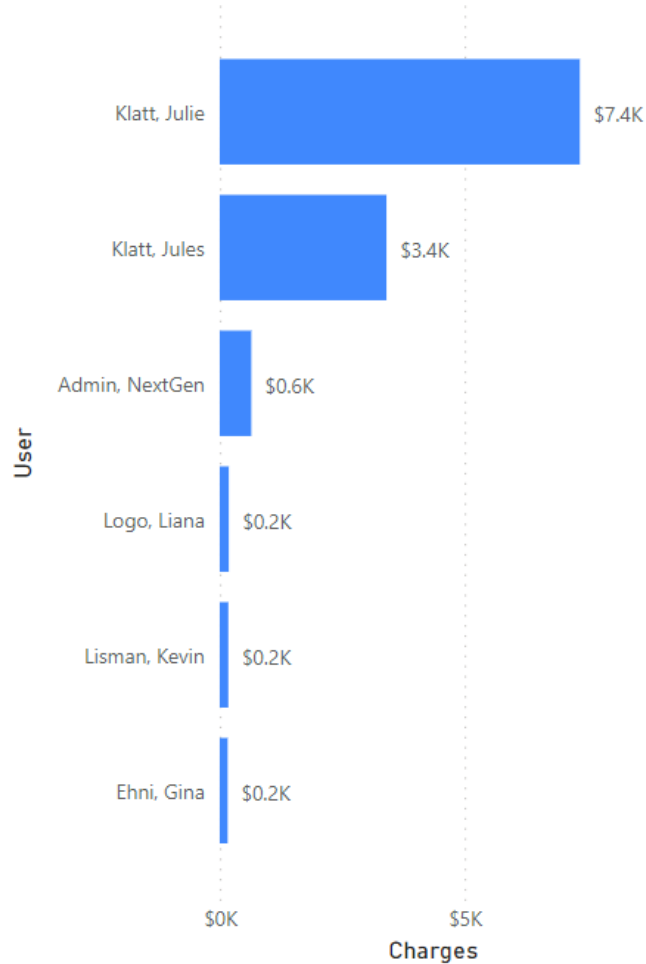
All

Date Of Service

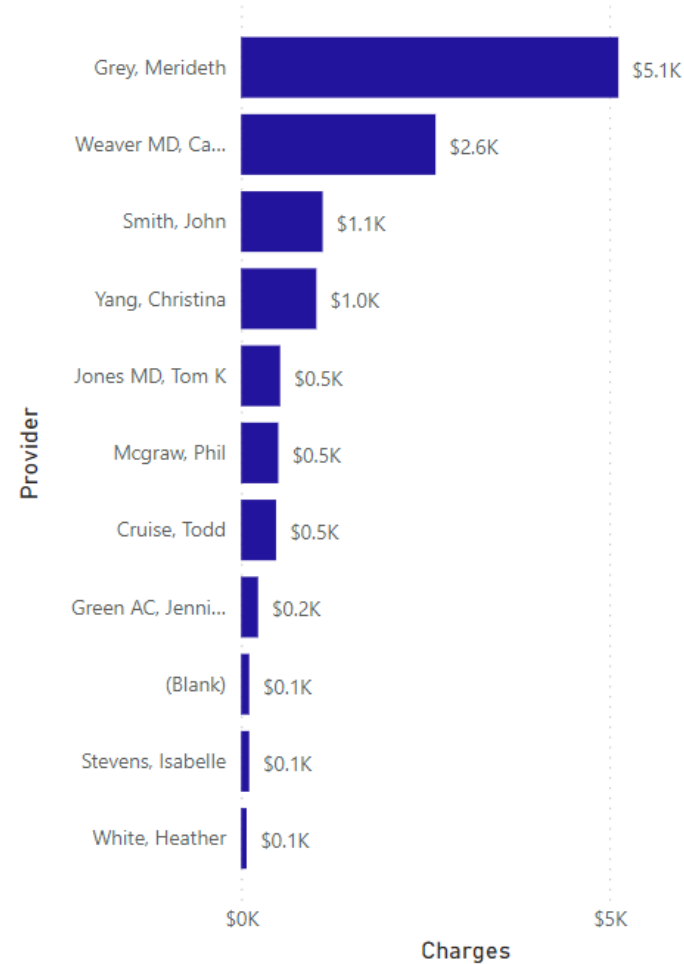
8/1/2019

7/1/2021

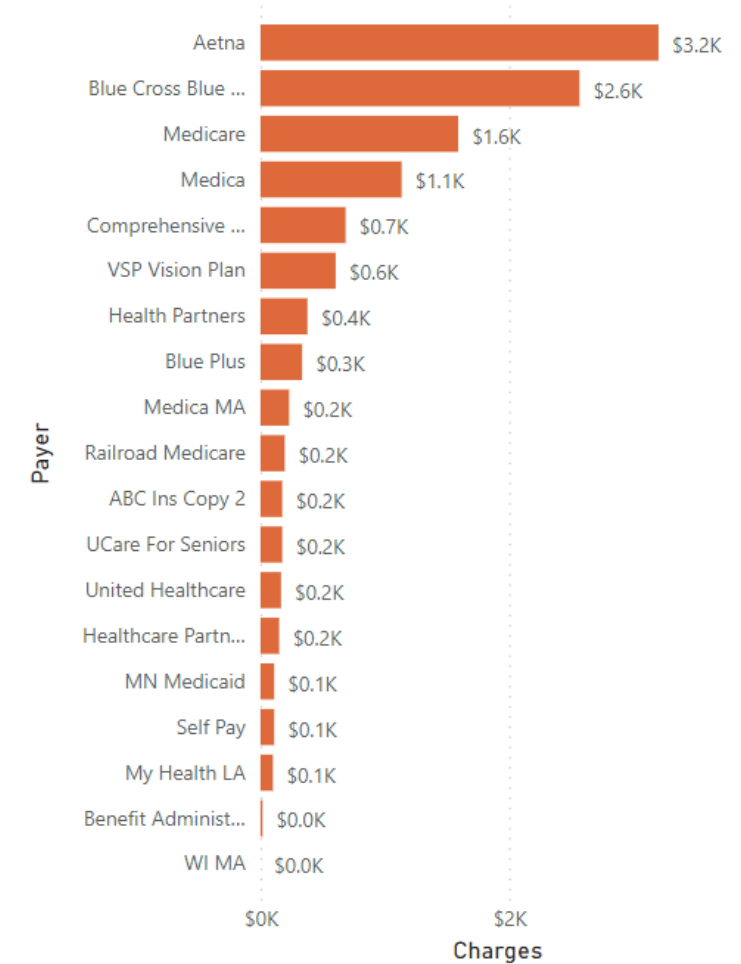
### Charges by User



### Charges by Provider



### Charges by Payer



Confidential and Proprietary



# Daily Charges

Raw data page shows all charges entered on a specific selected date range. Filter for additional charge details desired.

## 2: Raw Data



### Daily Charges Detail

Practice

All

Location

All

SIM Code

All

Provider

All

Payer

All

Date Of Service

8/1/2019

7/1/2021

Practice	Location	Per son #	Guar. Person #	Account #	Encounter #	Begin Date of Service	SIM	SIM Description	Section	Source Type	Status	Prov
MTS Clinic	MTS Clinic	264	264	192	3838	7/1/2021	99213	Office/outpatient visit, est, exp prob	Accounts Receivable	Encounter	Billed	Jone
MTS Clinic	MTS Clinic			154	12	6/23/2021	99203	Office/outpatient visit, new, detailed	Accounts Receivable	Invoice	Unbilled	
MTS Clinic	MTS Clinic	369	369	304	3831	6/23/2021	99203	Office/outpatient visit, new, detailed	Accounts Receivable	Encounter	Billed	Yang
MTS Clinic	MTS Clinic	369		154	3832	6/23/2021	99203	Office/outpatient visit, new, detailed	Accounts Receivable	Encounter	Billed	Yang
MTS Clinic	MTS Clinic	22	22	17	3824	6/18/2021	99212	Office/outpatient visit, est, prob foc	Accounts Receivable	Encounter	Billed	Yang
MTS Clinic	Outside Location	22	22	17	3824	6/18/2021	80047	METABOLIC PANEL IONIZED CA	Accounts Receivable	Encounter	Billed	Yang
MTS Clinic	MTS Clinic	356	356	292	3823	6/11/2021	9921125	Office/outpatient visit, est, minimal	Accounts Receivable	Encounter	Billed	Yang
MTS Clinic	Outside Location	356	356	292	3823	6/11/2021	82435	Assay, blood chlorides	Accounts Receivable	Encounter	Billed	Yang
MTS Clinic	MTS Clinic	290	290	217	3814	6/8/2021	99213	Office/outpatient visit, est, exp prob	Accounts Receivable	Encounter	Unbilled	Grey
MTS Clinic	MTS Clinic	53	53	51	3812	5/24/2021	99202	Office/outpatient visit, new, expanded prob	Accounts Receivable	Encounter	Billed	Smi
MTS Clinic	Testing Becky	53	53	51	3812	5/24/2021	84132	Assay, blood potassium	Accounts Receivable	Encounter	Billed	Smi
MTS Clinic	MTS Clinic	66	66	57	3808	5/12/2021	99212	Office/outpatient visit, est, prob foc	Accounts Receivable	Encounter	Billed	Cru
MTS Clinic	MTS Clinic	369	369	304	3807	5/12/2021	99211	Office/outpatient 2400 SV1	Accounts Receivable	Encounter	Billed	Yang
MTS Clinic	MTS Clinic	39	20	13	3805	5/10/2021	66999	Anterior eye surgery procedure NEC	Accounts Receivable	Encounter	Billed	Grey
MTS Clinic	MTS Clinic	369	369	304	3797	5/5/2021	99213	Office/outpatient visit, est, exp prob	Accounts Receivable	Encounter	Billed	Yang
MTS Clinic	MTS Clinic	22	22	17	3780	3/25/2021	99213	Office/outpatient visit, est, exp prob	Accounts Receivable	Encounter	Billed	Yang
MTS Clinic	Elk River Office	54	54	49	3778	3/18/2021	J7303	Contraceptive vaginal ring	Accounts Receivable	Encounter	Unbilled	Yang
MTS Clinic	Mpls Office	356	356	292	3776	3/12/2021	11111	MN Care Tax	Accounts Receivable	Encounter	Unbilled	Jone
MTS Clinic	Mpls Office	356	356	292	3776	3/12/2021	99201	Office/outpatient visit, new, problem focused	Accounts Receivable	Encounter	Unbilled	Jone
MTS Clinic	Mpls Office	369	369	304	3777	3/12/2021	Q0505	Miscl supply/accessory vad	Accounts Receivable	Encounter	Billed	Jone
MTS Clinic	Mpls Office	369	369	304	3777	3/12/2021	Q0505	Miscl supply/accessory vad	Accounts Receivable	Encounter	Unbilled	Jone
MTS Clinic	Elk River Office	39	20	13	3771	2/24/2021	99211	Office/outpatient 2400 SV1	Accounts Receivable	Encounter	Billed	Smi
MTS Clinic	Elk River Office	217	217	160	3773	2/24/2021	99211	Office/outpatient 2400 SV1	Accounts Receivable	Encounter	Unbilled	Grey
MTS Clinic	Elk River Office	369	369	304	3770	2/10/2021	99212	Office/outpatient visit, est, prob foc	Accounts Receivable	Encounter	Billed	Wea
MTS Clinic	Elk River Office	66	66	57	3769	2/9/2021	99213	Office/outpatient visit, est, exp prob	Accounts Receivable	Encounter	Billed	Cru
MTS Clinic	MTS Clinic	49	49	43	3762	12/10/2020	52204	Cystoscopy/biopsy	Accounts Receivable	Encounter	Billed	Grey
MTS Clinic	MTS Clinic	40	40	42	3762	12/10/2020	01002	Urinalysis, non-automated, w/c scope	Accounts Receivable	Encounter	Billed	Cru
<b>Total</b>												

# Encounter Unapplied Credits

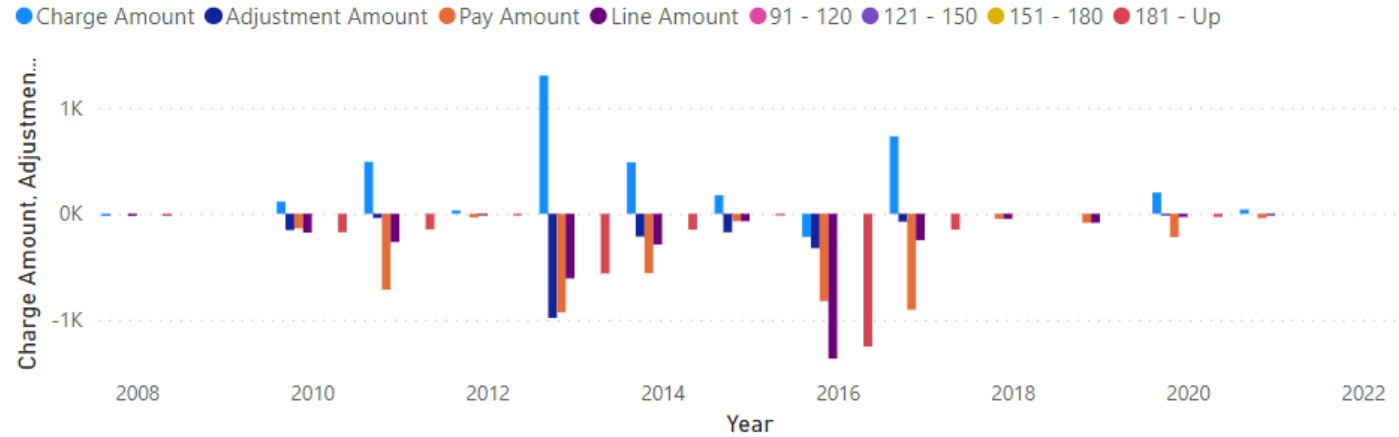
Lists all encounters that contain unapplied credit amounts.



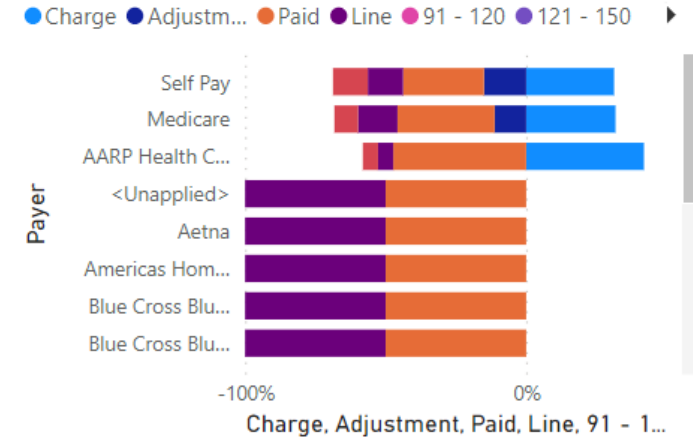
## Encounter Unapplied Credits

Encounter # 
 Provider 
 Payer 
 Service Item 
 Encounter Date

### Encounter Unapplied Credits By Encounter Date

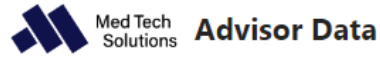


### By Payer



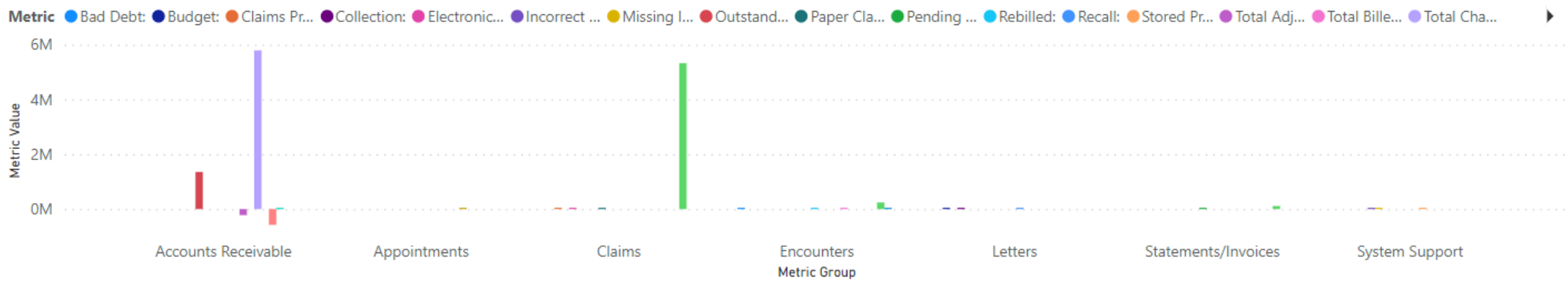
Location	Provider	Encounter Number	Payer Name	Policy Number	Group Number	Date of Service	Se l t e
<Unknown>	<Unapplied>	0	<Unapplied>				
St Paul Office	<Unapplied>	2000	Self Pay				
MTS Clinic	Carrie Weaver MD	1528	Self Pay			04/23/2014	99.
Elk River Office	Carrie Weaver MD	3482	Self Pay			03/26/2020	99.
Elk River Office	Carrie Weaver MD	3482	Self Pay			03/26/2020	99.
Elk River Office	Christina Yang	751	Self Pay			09/23/2011	99.
MTS Main Optical	John Smith	1438	Self Pay			11/05/2013	S9
MTS Main Optical	John Smith	1438	Self Pay			11/05/2013	V2
Mpls Office	Merideth Grey	29	Self Pay			02/22/2008	99.
MTS Clinic	Merideth Grey	250	Self Pay			04/13/2010	99.
<b>Total</b>							





Practice: 
 Metric Group: 
 Metric: 
 Date:  to

Metric Value by Metric Group and Metric



Metric Group	Metric Date	Bad Debt:	Budget:	Claims Processed (YTD):	Collection:	Electronic Claims:	Incorrect Indexes:	Missing Indexes:	Outstanding AR:	Paper Claims:	Pending Statement:
Accounts Receivable	12/01/2020								34,305.46		
	12/02/2020								137,752.54		
	12/13/2020								35,769.15		
	12/17/2020								143,076.62		
	06/01/2021								190,816.89		
	06/06/2021								190,816.89		
	06/09/2021								621,628.63		
	<b>Total</b>								<b>1,354,166.18</b>		
Appointments	12/02/2020										
	12/17/2020										
	06/09/2021										
<b>Total</b>											
Claims	12/02/2020			21.00		579.00				22.00	
	12/17/2020			21.00		580.00				22.00	

# Practice Summary

Overview and collection of financial and clinical data.

## 1: Financial Overview


**Practice Summary**
 Location (Charges) All
 Provider (Charges) All
 Payer (Charges) All
 Date (Charges) 1/1/2020 2/28/2022

**\$150** **\$13,767.45**  
 Total Bad Debt Total Charges

### Payments

Payer	Amount	% Amount
ABC Ins Copy 2	\$0.00	0.00%
Aetna	\$50.00	3.99%
Aetna Advanced SIM Attached	\$50.00	3.99%
Benefit Administrators Services	\$0.00	0.00%
Blue Cross Blue Shield	\$117.00	9.35%
Blue Plus	\$50.00	3.99%
Comprehensive Care Services	\$220.00	17.57%
Health Partners	\$755.00	60.30%
<b>Total</b>	<b>\$1,252.00</b>	<b>100.00%</b>

### Accounts Receivable

Age	Amount	% Amount
1-30	\$0.00	0.00%
121+	\$13,767.45	100.00%
<b>Total</b>	<b>\$13,767.45</b>	<b>100.00%</b>

### Denials

Denial	# Denial	% Denial
N179 (Need Information From Patient)	6	85.71%
PR2 (Coinsurance Amount)	1	14.29%
<b>Total</b>	<b>7</b>	<b>100.00%</b>

**\$383.60**

Total Adjustments

### Charges Amount by Payer and Payer



### Charges Amount by AR Age and AR Age



# Practice Summary

AR Specific overview with filters for location and providers.

## 2: AR Summary

 **Practice Summary**

Encounter Date:

Encounter Location:

Encounter Provider:

### Encounters Summary

Location	Provider	Financial Class	# of Encounters	# Missing Document	# Missing Document Signoff	# Missing EM
MTS Clinic	Cruise MD, Todd	Commercial	1	1		1
Elk River Office	Cruise MD, Todd	Medicare	1	1		1
Elk River Office	Grey MD, Merideth	BCBS	2	2		2
MTS Clinic	Grey MD, Merideth	BCBS	3	1	2	3
Elk River Office	Grey MD, Merideth	Commercial	1	1		1
North Clinic	Grey MD, Merideth	Medicare	1	1		1
Mpls Office	Jones MD, Tom K.	BCBS	1	1		1
<b>Total</b>			<b>19</b>	<b>16</b>	<b>3</b>	<b>19</b>

### Encounters Summary

Location	Provider	Encounter #	Encounter Date	EM Code Submitted	Document On Encounter	EM Code	Document Sign-off Status
Elk River Office	Cruise MD, Todd	3571	10/16/2020				
MTS Clinic	Cruise MD, Todd	3808	5/12/2021				
Elk River Office	Grey MD, Merideth	3566	10/7/2020				
Elk River Office	Grey MD, Merideth	3773	2/24/2021				
Elk River Office	Grey MD, Merideth	4777	7/23/2021				
MTS Clinic	Grey MD, Merideth	3749	10/20/2020				
MTS Clinic	Grey MD, Merideth	3735	10/20/2020		Y		Pending
MTS Clinic	Grey MD, Merideth	4752	7/22/2021		Y		Pending
North Clinic	Grey MD, Merideth	4889	1/25/2022				
Mpls Office	Jones MD, Tom K.	4845	10/12/2021				
Elk River Office	Mcgraw PhD, Phil	3569	10/9/2020				
Elk River Office	Mcgraw PhD, Phil	4850	10/19/2021				
Elk River Office	Smith MD, John	3771	2/24/2021				
MTS Clinic	Smith MD, John	3812	5/24/2021				
MTS Clinic	Smith MD, John	3584	10/20/2020		Y		Pending
Elk River Office	Weaver MD, Carrie	3565	10/7/2020				



# Practice Summary

Used to show all missing items such as document not on encounter, no EM code, no sign-off on document on encounter.

## 3: Bad Debt and Missing Items

Pages << File Export Share Chat in Teams Get insights Subscribe Edit ...

AR Summary

Encounter Summary

**Bad Debt and Missing L...**

### ynoff (Doc) Details

Encounter #	Date of Service	Document	Missing Signoff	Provider
3689	10/20/2020	MTS Master Im	1	Grey MD, Merideth
3735	10/20/2020	MTS Master Im	1	Grey MD, Merideth
3838	7/1/2021	MTS Master Im	1	Jones MD, Tom K
3564	9/30/2020	MTS Master Im	1	Weaver MD, Carne

Practice: All

Provider: All

Date of Service: 2/5/2008 - 9/12/2022

### Bad Debt Details

Encounter #	Encounter Date	Amount
3484	3/27/2020	\$155.00
3522	6/30/2020	\$70.00
3522	6/30/2020	\$115.00
3564	9/30/2020	\$175.00
3565	10/2/2020	\$115.00
3566	10/7/2020	\$115.00
3569	10/9/2020	\$115.00
3689	10/20/2020	\$110.00
3735	10/20/2020	\$95.00
3771	2/24/2021	\$95.00
3780	3/25/2021	\$175.00
3797	5/5/2021	\$175.00
3805	5/10/2021	\$500.00

### Missing Document Details

Encounter #	Date of Service	Document Missing	Provider	# Missing Docs
3484	3/27/2020	Y	Weaver MD, Carne	1
3522	6/30/2020	Y	Jones MD, Tom K	1
3565	10/2/2020	Y	Weaver MD, Carne	1
3566	10/7/2020	Y	Grey MD, Merideth	1
3569	10/9/2020	Y	Mcgraw PhD, Phil	1
3771	2/24/2021	Y	Smith MD, John	1
3780	3/25/2021	Y	Yang MD, Christina	1
3797	5/5/2021	Y	Yang MD, Christina	1
3805	5/10/2021	Y	Grey MD, Merideth	1
3812	5/24/2021	Y	Smith MD, John	1
3824	6/18/2021	Y	Yang MD, Christina	1
3832	6/23/2021	Y	Yang MD, Christina	1
4777	7/23/2021	Y	Grey MD, Merideth	1
4821	8/16/2021	Y	Grey MD, Merideth	1

### EM Code Missing Details

Encounter #	Date of Service	Missing EM Code	Provider	# Missing EM Code
3484	3/27/2020	Y	Weaver MD, Carne	1
3522	6/30/2020	Y	Jones MD, Tom K	1
3565	10/2/2020	Y	Weaver MD, Carne	1
3566	10/7/2020	Y	Grey MD, Merideth	1
3569	10/9/2020	Y	Mcgraw PhD, Phil	1
3689	10/20/2020	Y	Grey MD, Merideth	1
3735	10/20/2020	Y	Grey MD, Merideth	1
3771	2/24/2021	Y	Smith MD, John	1
3780	3/25/2021	Y	Yang MD, Christina	1
3797	5/5/2021	Y	Yang MD, Christina	1
3805	5/10/2021	Y	Grey MD, Merideth	1
3812	5/24/2021	Y	Smith MD, John	1
3824	6/18/2021	Y	Yang MD, Christina	1
3832	6/23/2021	Y	Yang MD, Christina	1



# Provider RVU

Displays the RVU values on encounters and charges.

1: Dashboard



DOS

Last 2 Years

DOS (Between)

2/18/2020 2/16/2022

6/15/2021 - 6/14/2023

Department

All

Location

All

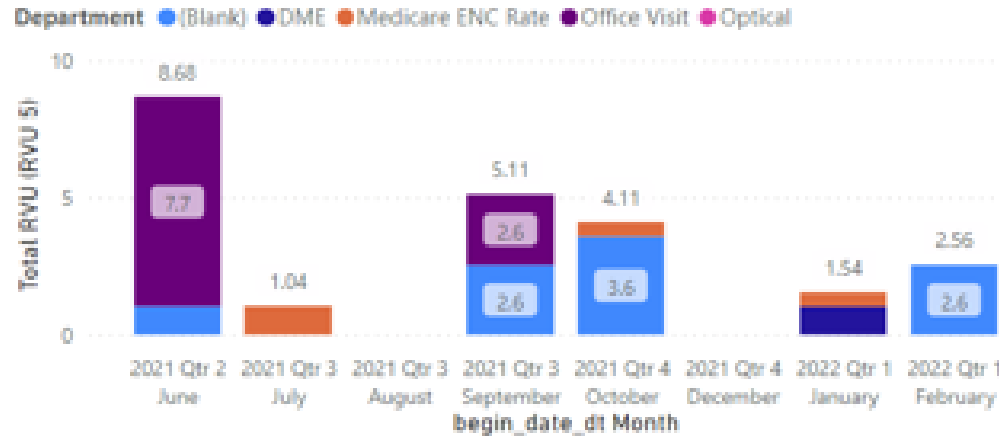
Financial Class

All

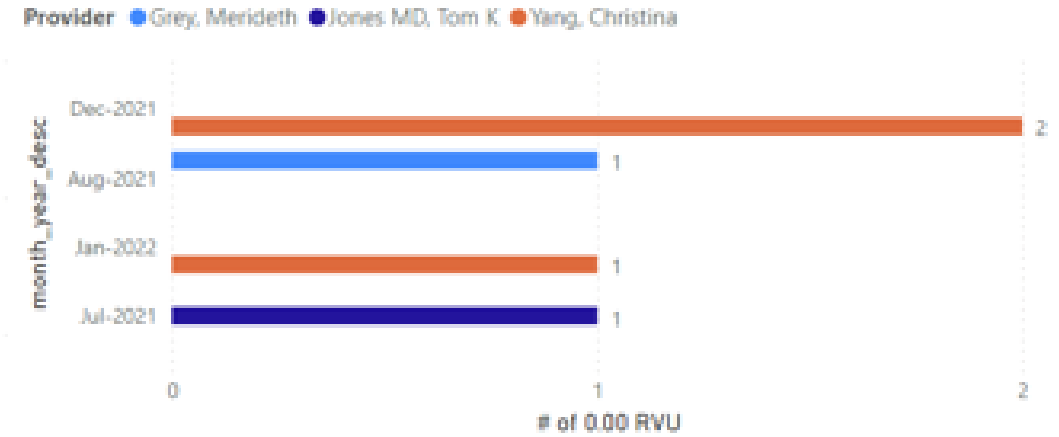
Provider

All

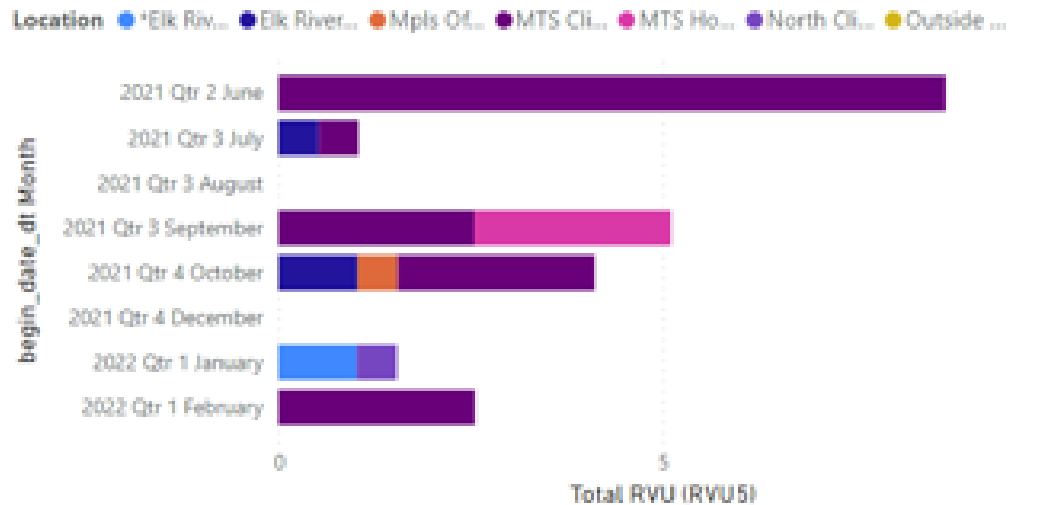
Total RVU (RVU 5) by Year, Quarter, Month and Department



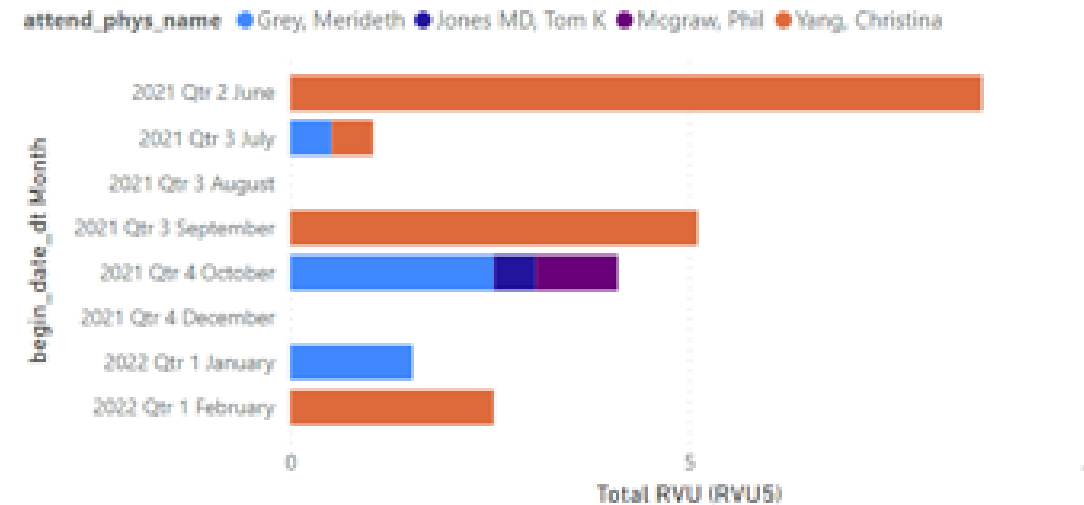
# of 0.00 RVU by month\_year\_desc and Provider



Total RVU By Location



Total RVU By Provider



# Provider RVU

Displays the RVU values on encounters and charges.

## 2: Raw Data



DOS: Last | 2 | Years | DOS (Between): 2/18/2020 | 2/16/2022 | Department: All | Location: All | Financial Class: All | Provider: All  
 6/15/2021 - 6/14/2023

### Totals By Provider

Provider	Work RVU (RVU1)	Facility PE RVU (RVU2)	RVU4	Total RVU (RVU5)	# of Encount
Grey, Merideth	3.11	3.00	0.02	4.62	
Jones MD, Tom K	1.08	1.07	0.00	0.52	
Mcgraw, Phil	0.45	0.54	0.01	1.03	
Yang, Christina	10.58	8.89	0.11	16.87	
<b>Total</b>	<b>15.22</b>	<b>13.50</b>	<b>0.14</b>	<b>23.04</b>	

### Totals By Location

Location	Work RVU (RVU1)	Facility PE RVU (RVU2)	RVU4	Total RVU (RVU5)	# of Encour
*Elk River Office	0.45	0.53	0.01	1.02	
Elk River Office	0.62	0.87	0.01	1.55	
Mpls Office	0.17	0.33	0.00	0.52	
MTS Clinic	11.49	9.63	0.11	16.87	
MTS Hospital	1.41	1.07	0.01	2.56	
North Clinic	1.08	1.07	0.00	0.52	
Outside Location	0.00	0.00	0.00	0.00	
<b>Total</b>	<b>15.22</b>	<b>13.50</b>	<b>0.14</b>	<b>23.04</b>	

### RVU Raw Data

Encounter #	Med Rec #	Per son #	DOS	Provider	Location	Financial Class	Department	CPT4 Code ID	CPT4 Desc	SIM ID	SIM D
4841	000000000029	39	9/22/2021	Yang, Christina	MTS Hospital	BCBS		99214	Office/outpatient visit, est, detailed	99214	Office,
4847	000000000038	48	10/12/2021	Grey, Merideth	MTS Clinic	BCBS		99214	Office/outpatient visit, est, detailed	99214	Office,
4921	0000000000324	338	2/16/2022	Yang, Christina	MTS Clinic	Medicare		99214	Office/outpatient visit, est, detailed	99214	Office,
12			6/23/2021	Yang, Christina	MTS Clinic	Self Pay	Office Visit	99203	Office/outpatient visit, new, detailed	99203	Office,
3831	0000000000312	369	6/23/2021	Yang, Christina	MTS Clinic	Medicaid	Office Visit	99203	Office/outpatient visit, new, detailed	99203	Office,
3832	0000000000312	369	6/23/2021	Yang, Christina	MTS Clinic	BCBS	Office Visit	99203	Office/outpatient visit, new, detailed	99203	Office,
4823	0000000000055	66	9/1/2021	Yang, Christina	MTS Clinic	Commercial	Office Visit	99203	Office/outpatient visit, new, detailed	99203	Office,
3824	0000000000013	22	6/18/2021	Yang, Christina	MTS Clinic	BCBS		99212	Office/outpatient visit, est, prob foc	99212	Office,
4850	0000000000046	49	10/19/2021	Mcgraw, Phil	Elk River Office	BCBS		99212	Office/outpatient visit, est, prob foc	99212	Office,
<b>Total</b>											



# Reason Code Encounters (Future Appointments)

Future appointments that have past encounters with reason codes listed on transactions.

1: Overview



Practice: 
 Location: 
 Payer: 
 Provider: 
 Pre-List Eff. Date:  to

Choose row in below grid to update data on all grids (right click row to see raw data)

## Future Appointments with Reason Code

Encounter Nbr	Person Nbr	MRN	Future Appts.
66	20		
66	20	000000000001	
66	20	000000000010	
66	20	000000000011	
85	20		
85	20	000000000001	
85	20	000000000010	
85	20	000000000011	
457	48	000000000003	
457	48	000000000016	
457	48	000000000038	
654	100		
654	100	000000000101	
658	104	000000000104	
659	135	000000000105	
813	159	000000000091	
1072	60		
1072	60	000000000051	
1202	9		
1202	9	000000000002	
1202	9	000000000026	
1501	48	000000000003	
1501	48	000000000016	
1501	48	000000000038	
1621	53	000000000047	
1653	49		

## Reason Codes

Code 1	
Code 2	ALW (EOB Allowed/Paid Diff From Contract)
Code 3	PR2 (Coinsurance Amount)
Code 4	OA23 (Payment adjusted because charges have...)
Code 5	
Code 6	

## Visit Details


Practice	MTS Clinic
Location	Elk River Office
Provider	Cruise MD, Todd
Payer	AARP Health Care Options
Billable Date	8/28/2008
Pre-List Eff. Date	4/25/2012



# Reason Code Encounters (Future Appointments)

Future appointments that have past encounters with reason codes listed on transactions.

## 2: Raw Data



Practice

Location

Payer

Provider

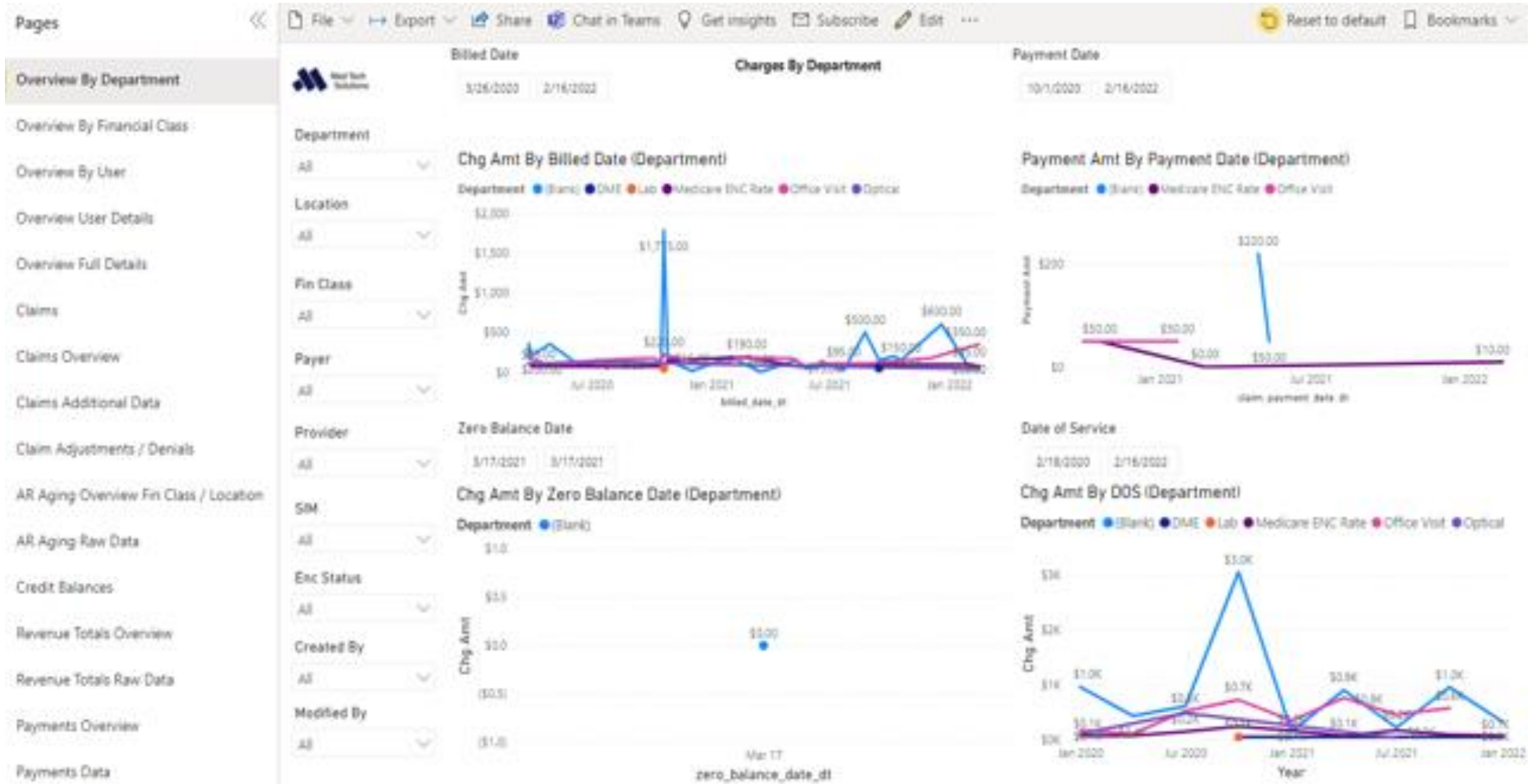
Pre-List Eff. Date

Practice	Collection Agency	Location	Encounter Nbr	Person Nbr	MRN	Future Appts.	Billable Date	Pre-List Eff. Date	Financial Class	Payer
MTS Clinic	Collection Agency	Elk River Office	433	51			4/4/2011	3/24/2016	BCBS	Blue Cross Blue Shield
MTS Clinic	Collection Agency	Elk River Office	433	51	000000000040		4/4/2011	3/24/2016	BCBS	Blue Cross Blue Shield
MTS Clinic	Collection Agency	Elk River Office	1454	217	000000000166		12/13/2013	6/30/2014	Medica	Medica
MTS Clinic	Collection Agency	Elk River Office	2287	49			7/12/2016	7/15/2016	Medica	Medica
MTS Clinic	Collection Agency	Elk River Office	2287	49	000000000022		7/12/2016	7/15/2016	Medica	Medica
MTS Clinic	Collection Agency	Elk River Office	2287	49	000000000046		7/12/2016	7/15/2016	Medica	Medica
MTS Clinic	Collection Agency	Elk River Office	3485	39	000000000005		3/27/2020	10/6/2021	Commercial	VSP Vision Plan
MTS Clinic	Collection Agency	Elk River Office	3485	39	000000000029		3/27/2020	10/6/2021	Commercial	VSP Vision Plan
MTS Clinic	Collection Agency	Elk River Office	2023	49			8/18/2015	7/15/2016	Medica	Medica
MTS Clinic	Collection Agency	Elk River Office	2023	49	000000000022		8/18/2015	7/15/2016	Medica	Medica
MTS Clinic	Collection Agency	Elk River Office	2023	49	000000000046		8/18/2015	7/15/2016	Medica	Medica
MTS Clinic	Collection Agency	Elk River Office	1202	9			4/3/2013	3/27/2020	Medica	Medica
MTS Clinic	Collection Agency	Elk River Office	1202	9	000000000002		4/3/2013	3/27/2020	Medica	Medica
MTS Clinic	Collection Agency	Elk River Office	1202	9	000000000026		4/3/2013	3/27/2020	Medica	Medica
MTS Clinic	Collection Agency	Mpls Office	1977	289	000000000227		7/29/2015	3/27/2020	Work Comp	WC Payer B (Payer Tab Ma
MTS Clinic	Collection Agency	MTS Clinic	718	189	000000000134		8/10/2011	9/12/2011	BCBS	Blue Cross Blue Shield Fed
MTS Clinic	Collection Agency	MTS Clinic	719	189	000000000134		8/30/2011	9/12/2011	BCBS	Blue Cross Blue Shield Fed
MTS Clinic	Collection Agency	MTS Clinic	1062	39	000000000005		12/10/2012	8/9/2015	Commercial	Aetna Advanced SIM Attac
MTS Clinic	Collection Agency	MTS Clinic	1062	39	000000000029		12/10/2012	8/9/2015	Commercial	Aetna Advanced SIM Attac
MTS Clinic	Collection Agency	MTS Clinic	1295	217	000000000166		9/4/2013	6/30/2014	Medica	Medica
MTS Clinic	Collection Agency	MTS Clinic	1348	61	000000000052		10/1/2013	4/14/2016	Medica	Medica
MTS Clinic	Collection Agency	MTS Clinic	1957	49			7/24/2015	12/14/2016	Work Comp	WC Payer D (No Mapping
MTS Clinic	Collection Agency	MTS Clinic	1957	49	000000000022		7/24/2015	12/14/2016	Work Comp	WC Payer D (No Mapping
MTS Clinic	Collection Agency	MTS Clinic	1957	49	000000000046		7/24/2015	12/14/2016	Work Comp	WC Payer D (No Mapping
MTS Clinic	Collection Agency	MTS Clinic	1969	289	000000000227		7/29/2015	3/27/2020	Work Comp	WC Payer A (General Tab I
MTS Clinic	Collection Agency	MTS Clinic	1979	289	000000000227		7/15/2015	3/27/2020	Work Comp	WC Payer B (Payer Tab Ma
MTS Clinic	Collection Agency	MTS Clinic	1985	268			7/29/2015	3/27/2020	Work Comp	WC Payer B (Payer Tab Ma
<b>Total</b>										

# Revenue Cycle

## 1: Overview by Department

Charges overview breakdown by department.





# Revenue Cycle

## 2: Overview by Financial Class

Charges overview breakdown by financial class.

**Pages**

- Overview By Department
- Overview By Financial Class
- Overview By User
- Overview User Details
- Overview Full Details
- Claims
- Claims Overview
- Claims Additional Data
- Claim Adjustments / Denials
- AR Aging Overview Fin Class / Location
- AR Aging Raw Data
- Credit Balances
- Revenue Totals Overview
- Revenue Totals Raw Data
- Payments Overview
- Payments Data

File Export Share Chat in Teams Get insights Subscribe Edit Reset to default Bookmarks

**Billed Date**  
1/04/2020 2/16/2022

**Department**  
All

**Location**  
All

**Fin Class**  
All

**Payer**  
All

**Provider**  
All

**SIM**  
All

**Enc Status**  
All

**Created By**  
All

**Modified By**  
All

**Charges By Financial Class**

**Chg Amt By Billed Date (Financial Class)**

Financial Class ● BCBS ● Commercial ● Health Partners ● Medica ● Medicaid ● Medicare

**Payment Date**  
10/1/2020 2/16/2022

**Payment Amt By Payment Date (Financial Class)**

Financial Class ● BCBS ● Commercial ● Medicare

**Zero Balance Date**  
3/17/2021 3/17/2021

**Chg Amt By Zero Balance Date (Financial Class)**

Financial Class ● Commercial

**Date of Service**  
1/16/2020 2/16/2022

**Chg Amt By DOS (Financial Class)**

Financial Class ● BCBS ● Commercial ● Health Partners ● Medica ● Medicaid ● Medicare



# Revenue Cycle

Charges overview breakdown by users who modified charges in PM.

## 3: Overview by User



# Revenue Cycle

## 4: Overview by User Details

Overview user details breakdown by users who modified charges in PM with average times for billing dates for performance by billing staff.

### Pages

Overview By Department

Overview By Financial Class

Overview By User

Overview User Details

Overview Full Details

Claims

Claims Overview

Claims Additional Data

Claim Adjustments / Denials

AR Aging Overview Fin Class / Location

AR Aging Raw Data

Credit Balances

Revenue Totals Overview

Revenue Totals Raw Data

Payments Overview

Payments Data

Med Tech Solutions		Charge Modified By User average # Days Enc to billed Average # Days Enc to Pay Average # Days Enc to Zero Balance Average #				
Encounter Date	2/1/2013 2/16/2022	<b>Gina Ehni</b>			\$0	
Date of Service	2/1/2013 2/16/2022	2020			\$0	
Department	All	Qtr 3			\$0	
Location	All	July			\$0	
Fin Class	All	13			\$0	
Provider	All	<b>Jules Klatt</b>	6.56		\$259	
Enc Status	All	2020	6.56		\$259	
Modified By	All	Qtr 1	10.50		\$259	
		February	70.00		\$0	
		18	70.00		\$0	
		March	3.89		\$391	
		24	35.00		\$15	
		26	0.00		\$0	
		27	0.00		\$0	
		30	0.00		\$7	
		Qtr 2	2.60		\$0	
		April	6.50		\$0	
		14	7.00		\$0	
		22	6.00		\$0	
		June	0.00		\$0	
		9	0.00		\$0	
		10	0.00		\$0	
		Qtr 3	0.00		\$0	
		July	0.00		\$0	
		2	0.00		\$0	
		6	0.00		\$0	
		<b>Julie Klatt</b>	28.75	129.43	5.00	\$90
		2020	41.45	181.20		\$40
		Qtr 1	0.00	399.00		\$10
		March	0.00	399.00		\$10
		26	0.00	399.00		\$11
		Qtr 2				\$0
		June				\$0
		<b>Total</b>	<b>30.52</b>	<b>116.00</b>	<b>5.00</b>	<b>\$361</b>

# Revenue Cycle

## 5: Overview Full Details

Charges overview all raw data of charges for review.

Pages

- Overview By Department
- Overview By Financial Class
- Overview By User
- Overview User Details
- Overview Full Details
- Claims
- Claims Overview
- Claims Additional Data
- Claim Adjustments / Denials
- AR Aging Overview Fin Class / Location
- AR Aging Raw Data
- Credit Balances
- Revenue Totals Overview
- Revenue Totals Raw Data
- Payments Overview
- Payments Data

Location	Department	Date of Service	Billed Date	Closing Date	Payment Date	Encounter Date	Zero Balance Ind	Zero Balano
Elk River Office		3/24/2020	4/28/2020 12:00:00 AM	3/24/2020 12:00:00 AM		3/24/2020	N	
Elk River Office		3/26/2020	3/26/2020 12:00:00 AM	3/26/2020 12:00:00 AM	4/29/2021 12:00:00 AM	3/26/2020	N	
Elk River Office		3/26/2020	3/26/2020 12:00:00 AM	3/26/2020 12:00:00 AM	4/29/2021 12:00:00 AM	3/26/2020	N	
Elk River Office		3/27/2020	3/27/2020 12:00:00 AM	3/27/2020 12:00:00 AM		3/27/2020	N	
Elk River Office		3/27/2020	3/27/2020 12:00:00 AM	3/27/2020 12:00:00 AM		3/27/2020	N	
Elk River Office		3/27/2020	3/27/2020 12:00:00 AM	3/27/2020 12:00:00 AM		3/27/2020	N	
Elk River Office		3/30/2020	3/30/2020 12:00:00 AM	3/30/2020 12:00:00 AM		3/30/2020	N	
Elk River Office		6/10/2020	6/10/2020 12:00:00 AM	6/10/2020 12:00:00 AM		6/10/2020	N	
Elk River Office		6/10/2020	6/10/2020 12:00:00 AM	6/10/2020 12:00:00 AM		6/10/2020	N	
Elk River Office		7/2/2020	7/2/2020 12:00:00 AM	7/2/2020 12:00:00 AM		7/2/2020	N	
Elk River Office		7/2/2020	7/2/2020 12:00:00 AM	7/2/2020 12:00:00 AM		7/2/2020	N	
Elk River Office		7/6/2020	7/6/2020 12:00:00 AM	7/6/2020 12:00:00 AM		7/6/2020	N	
Elk River Office		10/2/2020	10/8/2020 12:00:00 AM	10/2/2020 12:00:00 AM		10/2/2020	N	
Elk River Office		10/7/2020	10/7/2020 12:00:00 AM	10/7/2020 12:00:00 AM		10/7/2020	N	
Elk River Office		10/9/2020	10/9/2020 12:00:00 AM	10/9/2020 12:00:00 AM		10/9/2020	N	
Elk River Office		10/14/2020	12/2/2020 12:00:00 AM	12/2/2020 12:00:00 AM		10/14/2020	N	
Elk River Office		10/16/2020	10/16/2020 12:00:00 AM	10/16/2020 12:00:00 AM		10/16/2020	N	
Elk River Office		10/19/2020	10/20/2020 12:00:00 AM	10/19/2020 12:00:00 AM		10/19/2020	N	
Elk River Office		10/19/2020	10/20/2020 12:00:00 AM	10/19/2020 12:00:00 AM		10/19/2020	N	
Elk River Office		10/19/2020	10/20/2020 12:00:00 AM	10/19/2020 12:00:00 AM		10/19/2020	N	
Elk River Office		10/19/2020	10/20/2020 12:00:00 AM	10/19/2020 12:00:00 AM		10/19/2020	N	
Elk River Office		11/12/2020		11/12/2020 12:00:00 AM		11/12/2020	N	
Elk River Office		11/12/2020		11/12/2020 12:00:00 AM		11/12/2020	N	
Elk River Office		2/10/2021	2/10/2021 12:00:00 AM	2/10/2021 12:00:00 AM		2/10/2021	N	
Elk River Office		3/18/2021		3/18/2021 12:00:00 AM		3/18/2021	N	
Elk River Office		7/23/2021	7/23/2021 12:00:00 AM	7/23/2021 12:00:00 AM		7/23/2021	N	
Elk River Office		10/19/2021	10/19/2021 12:00:00 AM	10/19/2021 12:00:00 AM		10/19/2021	N	
Mpls Office		3/12/2021		3/17/2021 12:00:00 AM		3/12/2021	N	
Mpls Office		3/12/2021		3/17/2021 12:00:00 AM		3/12/2021	N	
Mpls Office		3/12/2021		3/17/2021 12:00:00 AM		3/12/2021	Y	3/17/2021
Mpls Office		3/18/2021		3/18/2021 12:00:00 AM		3/18/2021	N	
<b>Total</b>								

# Revenue Cycle

Claims breakdown with denials.

## 6: Claims





# Revenue Cycle

## 7: Claims Overview

Claims breakdown with denials in visuals for custom dashboards. Breakdowns by claim type, location and provider.



# Revenue Cycle

## 8: Claims Additional Data

Claims raw data information.

Pages << File Export Share Chat in Teams Get insights Subscribe Edit ... Reset to default Bookmarks

Overview By Department

Overview By Financial ...

Overview By User

Overview User Details

Overview Full Details

Claims

Claims Overview

**Claims Additional Data**

Claim Adjustments / D...

AR Aging Overview Fin...

AR Aging Raw Data

Credit Balances

Revenue Totals Overview

Revenue Totals Raw Data

Payments Overview

Payments Data

Encounter Date: 2/18/2020 2/16/2022

Date of Service: 2/18/2020 2/16/2022

Claim Process Date: 8/18/2018 2/1/2022

Claim Request Date: 9/18/2018 2/16/2022

Department: All

Location: All

Fin Class: All

Provider: All

Enc Status: All

Modified By: All

Month / Year: All

Claim Type: All

Claim Request Status: All

Claim Status: All

Location	Provider	Encounter #	Processed Date	Claim Request Create Date	Claim Request Created By	Claim Request Modified Date	Claim Request Mo
Elk River Office	Cruise MD, Todd	3571		10/16/2020	Julie Klatt	10/16/2020	Julie Klatt
Elk River Office	Cruise MD, Todd	3769		2/9/2021	Julie Klatt	2/9/2021	Julie Klatt
Elk River Office	Grey MD, Merideth	17225		4/28/2020	Jules Klatt	4/28/2020	Jules Klatt
Elk River Office	Grey MD, Merideth	3566		10/7/2020	Julie Klatt	10/7/2020	Julie Klatt
Elk River Office	Grey MD, Merideth	25004		10/20/2020	Julie Klatt	10/20/2020	Julie Klatt
Elk River Office	Grey MD, Merideth	3550		10/21/2020	Julie Klatt	10/21/2020	Julie Klatt
Elk River Office	Grey MD, Merideth	3550		10/21/2020	Julie Klatt	10/21/2020	Julie Klatt
Elk River Office	Grey MD, Merideth	9554		7/23/2021	Julie Klatt	7/23/2021	Julie Klatt
Elk River Office	Mcgraw PhD, Phil	6872		9/23/2019	Jules Klatt	9/23/2019	Jules Klatt
Elk River Office	Mcgraw PhD, Phil	4850		10/19/2021	Julie Klatt	10/19/2021	Julie Klatt
Elk River Office	Mcgraw PhD, Phil	4850		10/19/2021	Julie Klatt	10/19/2021	Julie Klatt
Elk River Office	Weaver MD, Carrie	3237		1/21/2019	Julie Klatt	1/21/2019	Julie Klatt
Elk River Office	Weaver MD, Carrie	3303		3/8/2019	Jules Klatt	3/8/2019	Jules Klatt
Elk River Office	Weaver MD, Carrie	3303		3/8/2019	Jules Klatt	3/8/2019	Jules Klatt
Elk River Office	Weaver MD, Carrie	3524		7/6/2020	Jules Klatt	7/6/2020	Jules Klatt
Elk River Office	Weaver MD, Carrie	3565		10/8/2020	Julie Klatt	10/8/2020	Julie Klatt
Elk River Office	Weaver MD, Carrie	3758		12/2/2020	Julie Klatt	12/2/2020	Julie Klatt
Elk River Office	Yang MD, Christina	3542		9/11/2020	Julie Klatt	9/11/2020	Julie Klatt
Mpls Office	Grey MD, Merideth	6796		6/17/2019	Liana Logo	6/17/2019	Liana Logo
Mpls Office	Jones MD, Tom K	11331		3/17/2021	Julie Klatt	3/17/2021	Julie Klatt
Mpls Office	Jones MD, Tom K	11331		3/17/2021	Julie Klatt	3/17/2021	Julie Klatt
Mpls Office	Mcgraw PhD, Phil	3317		2/16/2019	Becky Mack	3/22/2019	Jules Klatt
MTS Clinic	Cruise MD, Todd	3808		5/12/2021	Julie Klatt	5/12/2021	Julie Klatt
MTS Clinic	Cruise MD, Todd	3808		5/12/2021	Julie Klatt	5/12/2021	Julie Klatt
MTS Clinic	Cruise MD, Todd	3808		5/12/2021	Julie Klatt	5/12/2021	Julie Klatt
MTS Clinic	Grey MD, Merideth	2811		11/14/2018	NextGen Admin	11/14/2018	NextGen Admin
MTS Clinic	Grey MD, Merideth	3215		3/18/2019	Jules Klatt	3/18/2019	Jules Klatt
MTS Clinic	Grey MD, Merideth	9684		3/20/2020	Jules Klatt	3/20/2020	Jules Klatt
MTS Clinic	Grey MD, Merideth	3493		4/28/2020	Jules Klatt	4/28/2020	Jules Klatt
<b>Total</b>							

**712143**



# Revenue Cycle

Claims denials and reason codes.

## 9: Claim Adjustments

Pages: Overview By Department, Overview By Financial..., Overview By User, Overview User Details, Overview Full Details, Claims, Claims Overview, Claims Additional Data, **Claim Adjustments / ...**, All Aging Overview Fin..., All Aging Raw Data, Credit Balances, Revenue Totals Overview, Revenue Totals Raw Data, Payments Overview, Payments Data

Claim Adjustment Type: All | Date of Service: 1/1/2015 - 12/31/2021 | Claim Type: All | Claim Request Status: All | Claim Status: All

Encounter Date: 2/1/2013 - 2/16/2022 | Claim Process Date: 9/1/2013 - 2/1/2022 | Claim Request Date: 9/1/2010 - 2/16/2022

Department: All | Location: All | Fin Class: All | Provider: All | Enc Status: All | Modified By: All

### Top 5 Claim Adjustment Types

2020 September	2020 October
NTN (Need Information From Patient)	PR2 (Coinsurance Adm...)
NTN (Need Information From Patient)	NTN (Need Information From Patient)

Location	Provider	Encounter #	Processed Date	Claim Request Create Date	Claim Request Created By	Claim Request Modified Date	Claim Request Mod...
Elk River Office	Weaver MD, Carrie	10443	3/26/2020	3/26/2020	Jules Klatt	3/26/2020	Jules Klatt
Elk River Office	Smith MD, John	3485	3/27/2020	3/27/2020	Jules Klatt	3/27/2020	Jules Klatt
Elk River Office	Weaver MD, Carrie	6954	3/27/2020	3/26/2020	Jules Klatt	3/27/2020	Jules Klatt
Elk River Office	Weaver MD, Carrie	6966	3/27/2020	3/27/2020	Jules Klatt	3/27/2020	Jules Klatt
Elk River Office	Weaver MD, Carrie	3484	3/27/2020	3/27/2020	Jules Klatt	3/27/2020	Jules Klatt
Elk River Office	Smith MD, John	6972	3/30/2020	3/30/2020	Jules Klatt	3/30/2020	Jules Klatt
Elk River Office	Weaver MD, Carrie	3514	6/9/2020	6/9/2020	Jules Klatt	6/9/2020	Jules Klatt
Elk River Office	Grey MD, Merideth	7034	6/10/2020	6/10/2020	Jules Klatt	6/10/2020	Jules Klatt
Elk River Office	Grey MD, Merideth	7034	6/10/2020	6/10/2020	Jules Klatt	6/10/2020	Jules Klatt
Elk River Office	Grey MD, Merideth	7046	7/2/2020	7/2/2020	Jules Klatt	7/2/2020	Jules Klatt
Elk River Office	Mcgraw PhD, Phil	3569	10/9/2020	10/9/2020	Jules Klatt	10/9/2020	Jules Klatt
Elk River Office	Mcgraw PhD, Phil	3569	10/9/2020	10/9/2020	Jules Klatt	10/9/2020	Jules Klatt
Elk River Office	Mcgraw PhD, Phil	3569	10/9/2020	10/9/2020	Jules Klatt	10/9/2020	Jules Klatt
Elk River Office	Mcgraw PhD, Phil	3569	10/9/2020	10/9/2020	Jules Klatt	10/9/2020	Jules Klatt
Elk River Office	Stevens MD, Isabelle	3570	10/14/2020	10/14/2020	Jules Klatt	10/14/2020	Jules Klatt
MTS Clinic	Weaver MD, Carrie	3560	10/14/2020	10/14/2020	Jules Klatt	10/14/2020	Jules Klatt
<b>Total</b>			<b>265629</b>				

# Revenue Cycle

AR aging data with breakdown by financial class and location.

## 10: AR Aging Overview



# Revenue Cycle

AR aging data with breakdown by financial class and location raw data.

## 11: AR Aging Raw Data

Pages

- Overview By Department
- Overview By Financial Class
- Overview By User
- Overview User Details
- Overview Full Details
- Claims
- Claims Overview
- Claims Additional Data
- Claim Adjustments / Denials
- AR Aging Overview Fin Class / Location
- AR Aging Raw Data
- Credit Balances
- Revenue Totals Overview
- Revenue Totals Raw Data
- Payments Overview
- Payments Data

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Last Bill Date: 12/8/2010 - 2/16/2022

Month Year: All

Location: All

Financial Class: All

Provider: All

Encounter Status: All

Financial Class AR Totals By Age							Location AR Totals By Age							
	0 - 30	31 - 60	61 - 90	91 - 120	121 - 150	151 - 180		0 - 30	31 - 60	61 - 90	91 - 120	121 - 150	151 - 180	181 Up
Auto							*Elk River Office	\$55.00						
BCBS	(\$53.00)				\$850.00	\$200.00	North Clinic	\$50.00	\$175.00					\$5
Commercial	(\$185.27)					\$110.00	Elk River Office				\$150.00			\$10
Health Partners	\$69.40		\$600.00				Gina's Radiology							
Invoice							Midwest Optical							\$3
Medica	(\$72.00)						Mpls Office	(\$75.00)			\$95.00			\$7
Medicaid							MTS Clinic	(\$113.60)	\$600.00		\$605.00	\$110.00	\$95	
Medicare	\$25.00	\$50.00	\$175.00				MTS Hospital	(\$20.00)				\$200.00	\$1,481	
New Financial Class							MTS Main Optical	(\$9.27)						\$3
Patient Pay							Riverside Optical							\$1
PPO	(\$45.00)						South Clinic							\$1
Specialty Services							Or Dept Office							\$5
<b>Total</b>	<b>(\$320.87)</b>	<b>\$105.00</b>	<b>\$775.00</b>		<b>\$850.00</b>	<b>\$310.00</b>	<b>Total</b>	<b>(\$320.87)</b>	<b>\$105.00</b>	<b>\$775.00</b>		<b>\$850.00</b>	<b>\$310.00</b>	<b>\$1,626.94</b>

**AR Raw Data**

Location	Financial Class	Source	Encounter #	MRN #	Last Bill Date	0 - 30 Amt	31 - 60 Amt	61 - 90 Amt	91 - 120 Amt	121 - 150 Amt	151 - 180 Amt	181 Up Amt	Line Item Amt
*Elk River Office	Health Partners	Encounter	3184	000000000161								\$150.00	\$150.00
*Elk River Office	Self Pay	Encounter	4886	000000000029			\$55.00						\$55.00
Elk River Office	BCBS	Encounter	282	000000000005	2/8/2011							\$15.00	\$15.00
Elk River Office	BCBS	Encounter	1629	000000000029	7/18/2016							\$1,800.00	\$1,800.00
Elk River Office	BCBS	Encounter	3771	000000000029	2/04/2021							\$95.00	\$95.00
Elk River Office	BCBS	Encounter	4821	000000000029	2/15/2022							(\$2.00)	(\$2.00)
Elk River Office	BCBS	Encounter	4850	000000000046	10/19/2021				\$150.00				\$150.00
Elk River Office	BCBS	Encounter	3569	000000000051	10/9/2020							\$115.00	\$115.00
Elk River Office	BCBS	Encounter	3514	000000000079	6/9/2020							\$75.00	\$75.00
Elk River Office	BCBS	Encounter	1417	000000000174	2/4/2014							(\$25.00)	(\$25.00)
Elk River Office	BCBS	Encounter	3566	000000000205	10/7/2020							\$115.00	\$115.00
Elk River Office	BCBS	Encounter	3444	000000000312								\$150.00	\$150.00
Elk River Office	BCBS	Encounter	6963	000000000312	3/26/2020							\$55.00	\$55.00
Elk River Office	BCBS	Encounter	6967	000000000312	3/27/2020							\$380.00	\$380.00
<b>Total</b>			<b>1533376</b>			<b>(\$320.87)</b>	<b>\$105.00</b>	<b>\$775.00</b>		<b>\$850.00</b>	<b>\$310.00</b>	<b>\$1,626,879.94</b>	<b>\$1,628,599.94</b>

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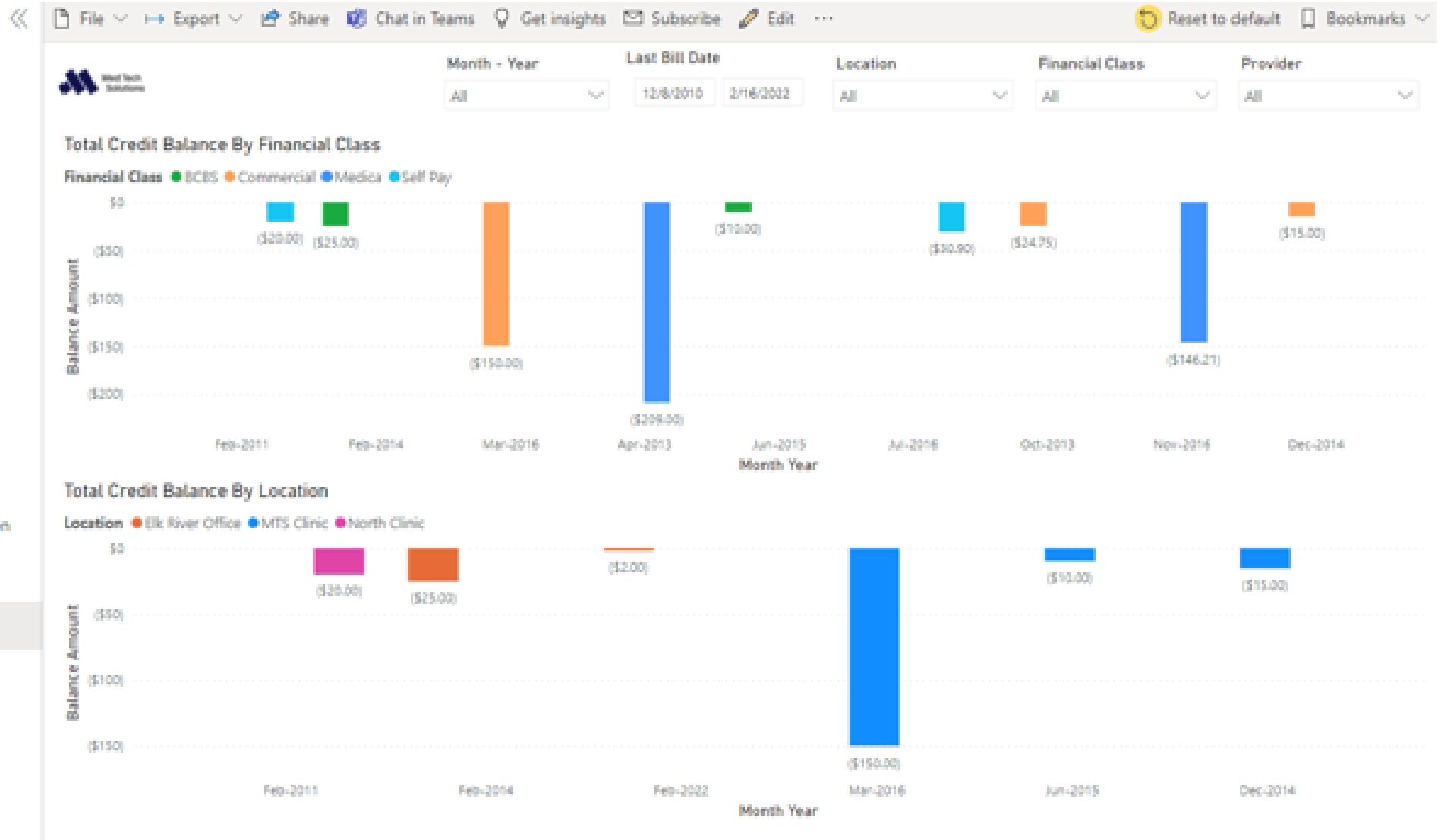
# Revenue Cycle

All credit balances with breakdown by location and financial class.

## 12: Credit Balances

### Pages

- Overview By Department
- Overview By Financial Class
- Overview By User
- Overview User Details
- Overview Full Details
- Claims
- Claims Overview
- Claims Additional Data
- Claim Adjustments / Denials
- AR Aging Overview Fin Class / Location
- AR Aging Raw Data
- Credit Balances**
- Revenue Totals Overview
- Revenue Totals Raw Data
- Payments Overview
- Payments Data





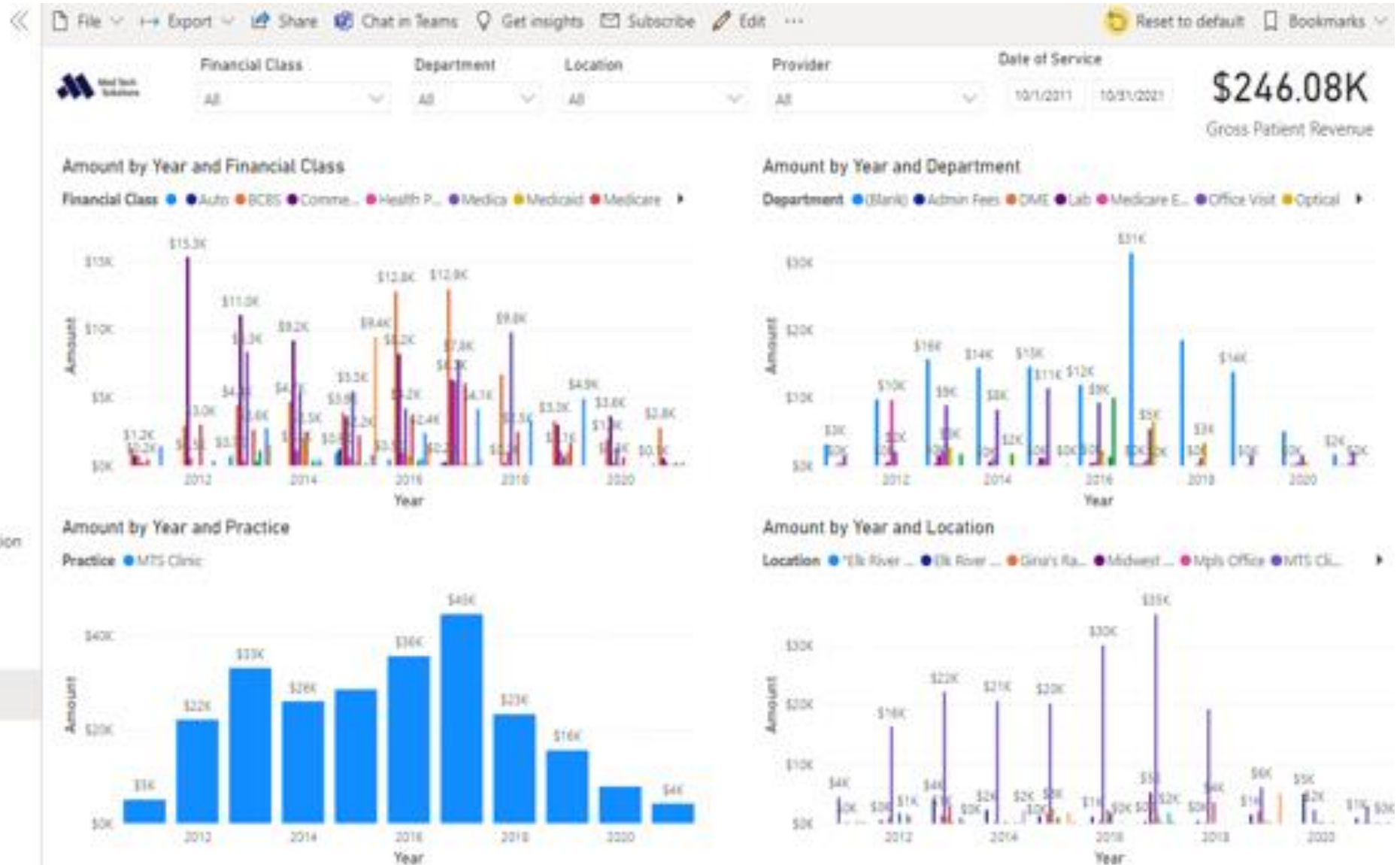
# Revenue Cycle

Revenue totals overview.

## 13: Revenue Totals Overview

### Pages

- Overview By Department
- Overview By Financial Class
- Overview By User
- Overview User Details
- Overview Full Details
- Claims
- Claims Overview
- Claims Additional Data
- Claim Adjustments / Denials
- AR Aging Overview Fin Class / Location
- AR Aging Raw Data
- Credit Balances
- Revenue Totals Overview**
- Revenue Totals Raw Data
- Payments Overview
- Payments Data



# Revenue Cycle

## 14: Revenue Totals Raw Data

Revenue totals raw data.

Pages

Overview By Department

Overview By Financial Class

Overview By User

Overview User Details

Overview Full Details

Claims

Claims Overview

Claims Additional Data

Claim Adjustments / Denials

AR Aging Overview Fin Class / Location

AR Aging Raw Data

Credit Balances

Revenue Totals Overview

Revenue Totals Raw Data

Payments Overview

Payments Data

Med Tech Solutions									
Financial Class		Department		Location		Provider		Date of Service	
All		All		All		All		10/1/2012	10/31/2021
<b>Totals By Financial Class</b>					<b>Totals By Department</b>				
Month - Year	Jan-2013	Jan-2014	Jan-2015	Jan-2016	Month - Year	Jan-2013	Jan-2014	Jan-2015	Jan-2016
Financial Class	Amount	% of Total	Amount	% of Total	Department	Amount	% of Total	Amount	% of Total
Auto			\$330.00	0.14%	Admin Fees	\$330.00	0.14%	\$225.00	0.10%
BCBS			\$350.00	0.15%	DME		\$0.00	\$55.00	0.02%
Commercial	\$300.00	0.13%	\$645.00	0.28%	Lab		\$85.00	\$191.00	0.08%
Health Partners			\$871.00	0.38%	Medicare ENC Rate		\$75.00		
Medica	\$165.00	0.07%	\$385.00	0.17%	Office Visit	\$270.00	0.12%	\$715.00	0.31%
Medicaid			\$175.00	0.08%	Optical			\$1,657.50	0.72%
Medicare	\$135.00	0.06%	\$20.00	0.01%	Pathology				
Patient Pay			\$0.00	0.00%	Radiology				
<b>Total</b>	<b>\$600.00</b>	<b>0.26%</b>	<b>\$1,100.00</b>	<b>0.48%</b>	<b>Total</b>	<b>\$600.00</b>	<b>0.26%</b>	<b>\$1,100.00</b>	<b>0.48%</b>
<b>Revenue Total Report (Deductions Excluded)</b>									
Financial Class	Department	Location	Encounter #	MRN #	Date of Service	Provider	Amount	SIM ID	SIM Description
BCBS	Surgery	MTS Clinic	2116	000000000044	1/28/2016	Christina Yang	\$10,000.00	50010	Exploration of kidney
Medica		MTS Clinic	2990	000000000055	1/12/2018	Carrie Weaver MD	\$9,600.00	00797	Anes, gastric restrictive prod morbid obesity
Commercial	Medicare ENC Rate	MTS Clinic	1062	000000000029	12/10/2012	Carrie Weaver	\$9,500.00	99211	Office/outpatient 2400 SV1
Health Partners		MTS Clinic	2623	000000000046	2/3/2017	Todd Cruise	\$5,199.00	V5260	HEARING AID; DIGIT; BIN; ITE
BCBS		MTS Clinic	2622	000000000046	2/1/2017	Merideth Grey	\$4,475.00	V5140	BEHIND EAR BINAURAL HEARING AI
Medica		MTS Clinic	2619	000000000046	1/31/2017	Merideth Grey	\$2,500.00	V5220	BEHIND EAR BICROS HEARING AI
BCBS		MTS Clinic	1742	000000000163	1/5/2015	Merideth Grey	\$2,300.00	40510	Excision of lip, transverse wedge w/closure
Commercial		MTS Clinic	1743	000000000163	12/16/2014	Merideth Grey	\$2,300.00	40510	Excision of lip, transverse wedge w/closure
Commercial		MTS Clinic	1749	000000000218	12/23/2014	Todd Cruise	\$2,300.00	40510	Excision of lip, transverse wedge w/closure
Commercial		St Paul Office	3314	000000000159	2/14/2019	Kenton Clark	\$2,000.00	52000	Cystoscopy
Medica		MTS Hospital	1973	000000000029	7/29/2015	Carrie Weaver MD	\$2,000.00	60200	Removal of thyroid lesion
Self Pay		St Paul Office	3311	000000000306	2/14/2019	Carrie Weaver MD	\$2,000.00	52332	Cystoscopy/insertion of stent
BCBS		MTS Clinic	3119	000000000253	8/30/2018	John Smith	\$1,950.50	J0178	Aflibercept injection
BCBS		MTS Clinic	3202	000000000055	12/11/2018	Carrie Weaver MD	\$1,850.00	J7298	Levonorgestrel Iu 52mg 5 yr
<b>Total</b>							<b>\$229,121.00</b>		



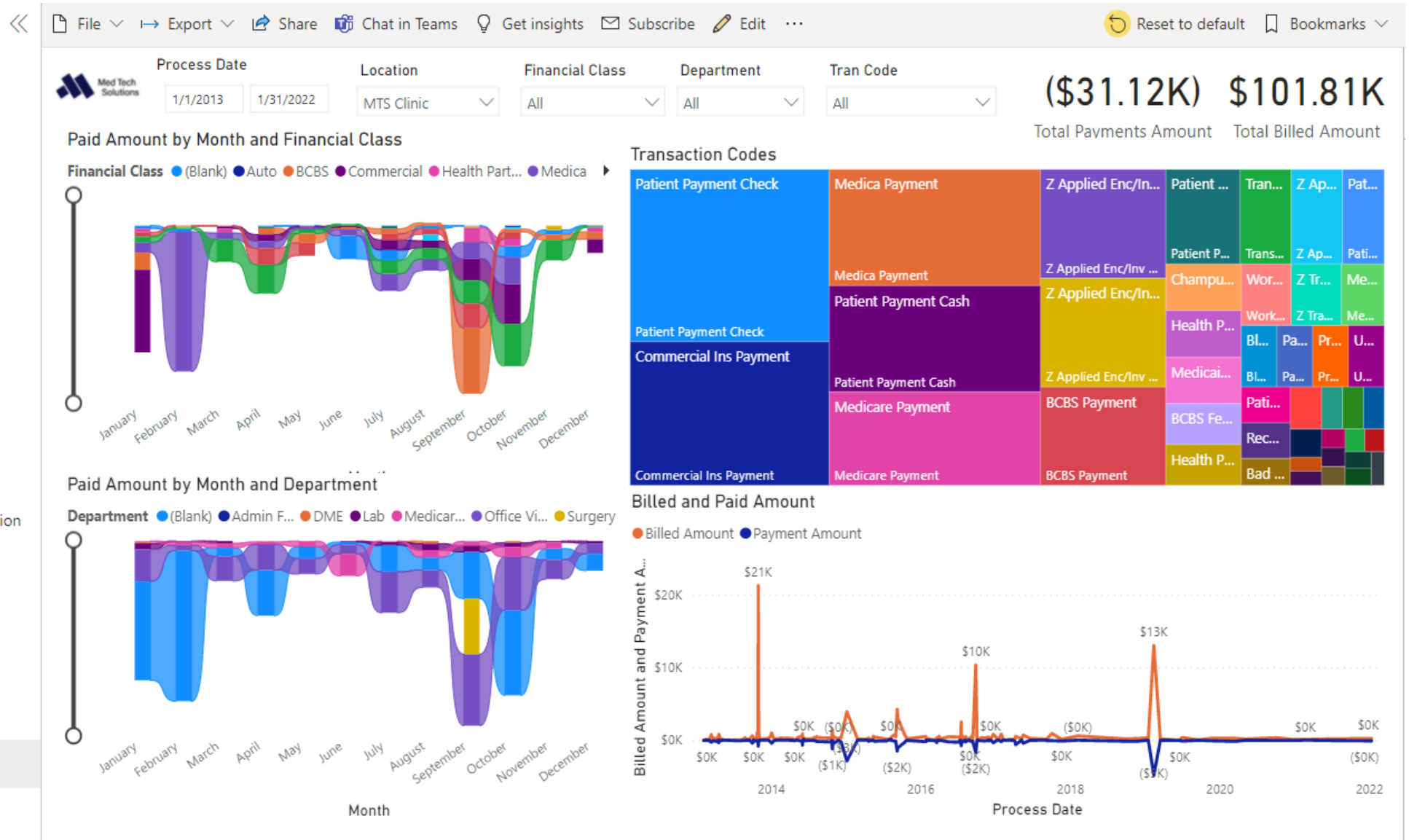
# Revenue Cycle

## 15: Payments Overview

Payments received overview.

### Pages

- Overview By Department
- Overview By Financial Class
- Overview By User
- Overview User Details
- Overview Full Details
- Claims
- Claims Overview
- Claims Additional Data
- Claim Adjustments / Denials
- AR Aging Overview Fin Class / Location
- AR Aging Raw Data
- Credit Balances
- Revenue Totals Overview
- Revenue Totals Raw Data
- Payments Overview**
- Payments Data



# Revenue Cycle

Payments raw data for review.

## 16: Payments Data

### Pages

- Overview By Department
- Overview By Financial Class
- Overview By User
- Overview User Details
- Overview Full Details
- Claims
- Claims Overview
- Claims Additional Data
- Claim Adjustments / Denials
- AR Aging Overview Fin Class / Location
- AR Aging Raw Data
- Credit Balances
- Revenue Totals Overview
- Revenue Totals Raw Data
- Payments Overview
- Payments Data

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**Process Date**

**Location**

**Financial Class**

**Department**

**Tran Code**

(\$39.43K) \$111.68K

**Total By Financial Class**

Financial Class	Pay Amount	% of Total
<Unapplied>	(\$2,608.85)	6.62
<Unapplied>	(\$2,364.99)	6.00
Auto	(\$50.00)	0.13
BCBS	(\$5,572.19)	14.13
Commercial	(\$6,388.15)	16.20
Health Partners	(\$1,593.00)	4.04
Medica	(\$8,470.00)	21.48
Medicaid	(\$279.00)	0.71
Medicare	(\$3,412.80)	8.66
RailRoad Medicare	(\$155.00)	0.39
<b>Total</b>	<b>(\$39,430.90)</b>	<b>100.00</b>

**Total By Department**

Department	Pay Amount	% of Total
Admin Fees	(\$10.00)	0.03
DME	(\$147.00)	0.37
Lab	(\$1,107.85)	2.81
Medicare ENC Rate	(\$1,952.50)	4.95
Office Visit	(\$9,485.88)	24.06
Optical	(\$2,290.55)	5.81
Surgery	(\$2,805.94)	7.12
<b>Total</b>	<b>(\$39,430.90)</b>	<b>100.00</b>

**Total By User**

User	Pay Amount	% of Total
Becky Mack	(\$5,847.10)	14.83%
Jules Klatt	(\$1,894.00)	4.80%
Julie Klatt	(\$5,172.50)	13.12%
Kathy Zwach	(\$17,854.15)	45.28%
Liana Logo	(\$190.00)	0.48%
NextGen Admin	(\$8,146.15)	20.66%
Susan Fisher	(\$327.00)	0.83%
<b>Total</b>	<b>(\$39,430.90)</b>	<b>100.00%</b>

**Total By Location**

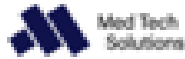
Location	Pay Amount	% of Total
Elk River Office	(\$2,380.00)	6.04
Midwest Optical	(\$1,750.14)	4.44
Mpls Office	(\$773.00)	1.96
MTS Clinic	(\$26,524.74)	67.42
MTS Hospital	(\$1,296.67)	3.29
MTS Main Optical	(\$980.18)	2.51
North Clinic	(\$135.00)	0.34
South Clinic	(\$146.18)	0.37
St Paul Office	(\$985.00)	2.52
<b>Total</b>	<b>(\$39,430.90)</b>	<b>100.00</b>

**Payments Data**

Location	Financial Class	Department	Batch #	Process Date	Transaction Date	Transaction Code	Billed Amount	Payment Amount	Transaction Status	Person
MTS Clinic			0002	7/18/2016	6/21/2010	Outsourced Patient Payment	\$155.00	(\$155.00)		
MTS Clinic			0002	6/3/2014	6/3/2014	Patient Pymt Credit Card Discover	\$30.00	(\$30.00)		
MTS Clinic		Medicare ENC Rate	0002	6/3/2014	6/3/2014	Patient Pymt Credit Card Discover	\$665.00	(\$665.00)		
Elk River Office	Self Pay		0001	8/12/2015	8/12/2015	Patient Pymt Credit Card Visa	\$725.00	(\$15.00)		9
Elk River Office	Self Pay		0002	8/12/2015	8/12/2015	Patient Pymt Credit Card Mastercard	\$50.00	(\$15.00)		9
Elk River Office	Self Pay		0002	8/12/2015	8/12/2015	Patient Pymt Credit Card Mastercard	\$725.00	(\$15.00)		9
Elk River Office	Self Pay		0003	8/12/2015	8/12/2015	Patient Payment Cash	\$725.00	(\$15.00)		9
Elk River Office	Self Pay	Office Visit	0001	8/12/2015	8/12/2015	Patient Pymt Credit Card Visa	\$135.00	(\$10.00)		9
MTS Clinic	BCBS		0003	9/11/2015	9/11/2015	BCBS Payment	\$155.00	(\$147.25)	Settled moved to self	9
St Paul Office	Self Pay		0001	8/9/2015	7/29/2015	Patient Payment Cash	\$0.00	(\$20.00)		9
MTS Clinic	Self Pay		0002	9/12/2016	9/12/2016	Patient Payment Cash	\$155.00	(\$155.00)		10
MTS Clinic	Work Comp		0002	7/18/2016	6/21/2010	Work Comp Payment	\$155.00	\$0.00	Settled moved to self	10
<b>Total</b>							<b>\$111,681.56</b>	<b>(\$39,430.90)</b>		

# Unapplied Amounts

Unapplied amounts for all unapplied values sitting in NextGen.

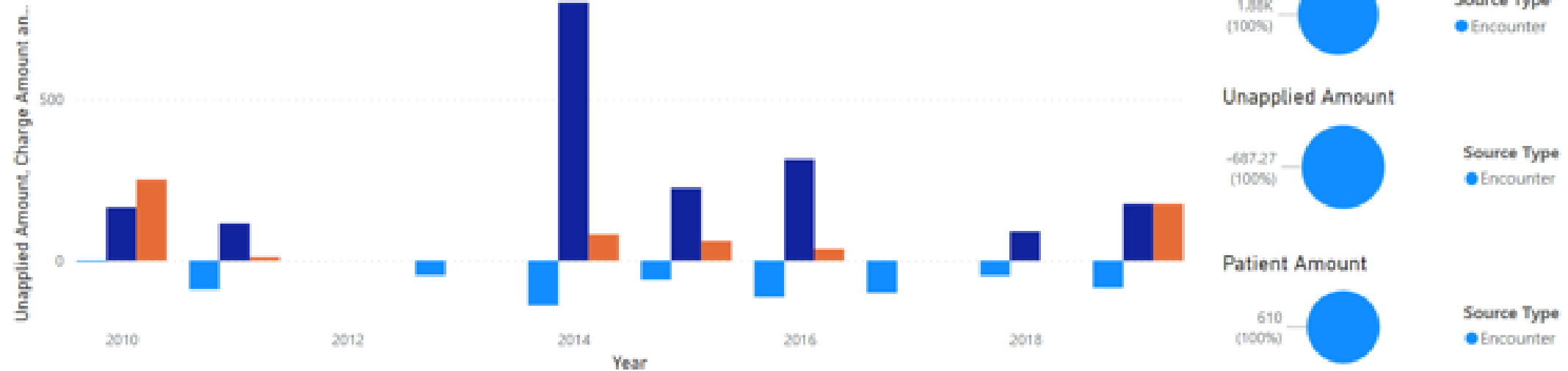


## Unapplied Amounts (Encounter, Account and Invoice)

Person #  Source Type  Account, Encounter, Invoice  Encounter Date

### Unapplied Amount, Charge Amount and Patient Amount by Year

● Unapplied Amount ● Charge Amount ● Patient Amount



Location	Person #	Source Number (Account, Encounter, Invoice)	Unapplied Amount	Charge Amount	Patient Amount
MTS Hospital	349	3384	-20.00	175.00	175.00
St Paul Office	32	259	-3.00	165.00	250.00
MTS Clinic	56	1531	-20.00	165.00	0.00
MTS Clinic	56	1532	-20.00	165.00	0.00
MTS Clinic	54	1534	-20.00	165.00	20.00
MTS Clinic	292	2177	-30.00	163.00	15.00
MTS Clinic	252	1575	-35.00	155.00	35.00
MTS Clinic	209	1697	-25.00	150.00	25.00
<b>Total</b>			<b>-687.27</b>	<b>1,883.27</b>	<b>610.00</b>



# Month End Reporting

6-month summary of charges, payments and adjustments with gross collection percentage.

## 1: Profit Overview



Practice: MTS Clinic | Location: All | Provider: All | Financial Class: All | Payer: All

- Period
- Nov-2021
  - Dec-2021
  - Jan-2022
  - Feb-2022
  - Mar-2022
  - Apr-2022
  - May-2022
  - Jun-2022
  - Jul-2022
  - Aug-2022
  - Sep-2022
  - Oct-2022
  - Nov-2022
  - Dec-2022
  - Jan-2023
  - Feb-2023
  - Mar-2023
  - Apr-2023
  - May-2023
  - Jun-2023
  - Jul-2023
  - Aug-2023
  - Sep-2023
  - Oct-2023
  - Nov-2023

### Profit Overview 6 Month Totals

Period	Charges	Payments	Adjustments	Gross Collection %
Sep-2022	\$13,305	\$260.00		1.95%
Aug-2022	(\$100)		\$0.00	
Jul-2022	\$82.5			
Jun-2022	\$10,051.54			
May-2022	\$2,341	\$95.00		4.06%
<b>Total</b>	<b>\$25,680.04</b>	<b>\$355.00</b>	<b>\$0.00</b>	<b>1.38%</b>

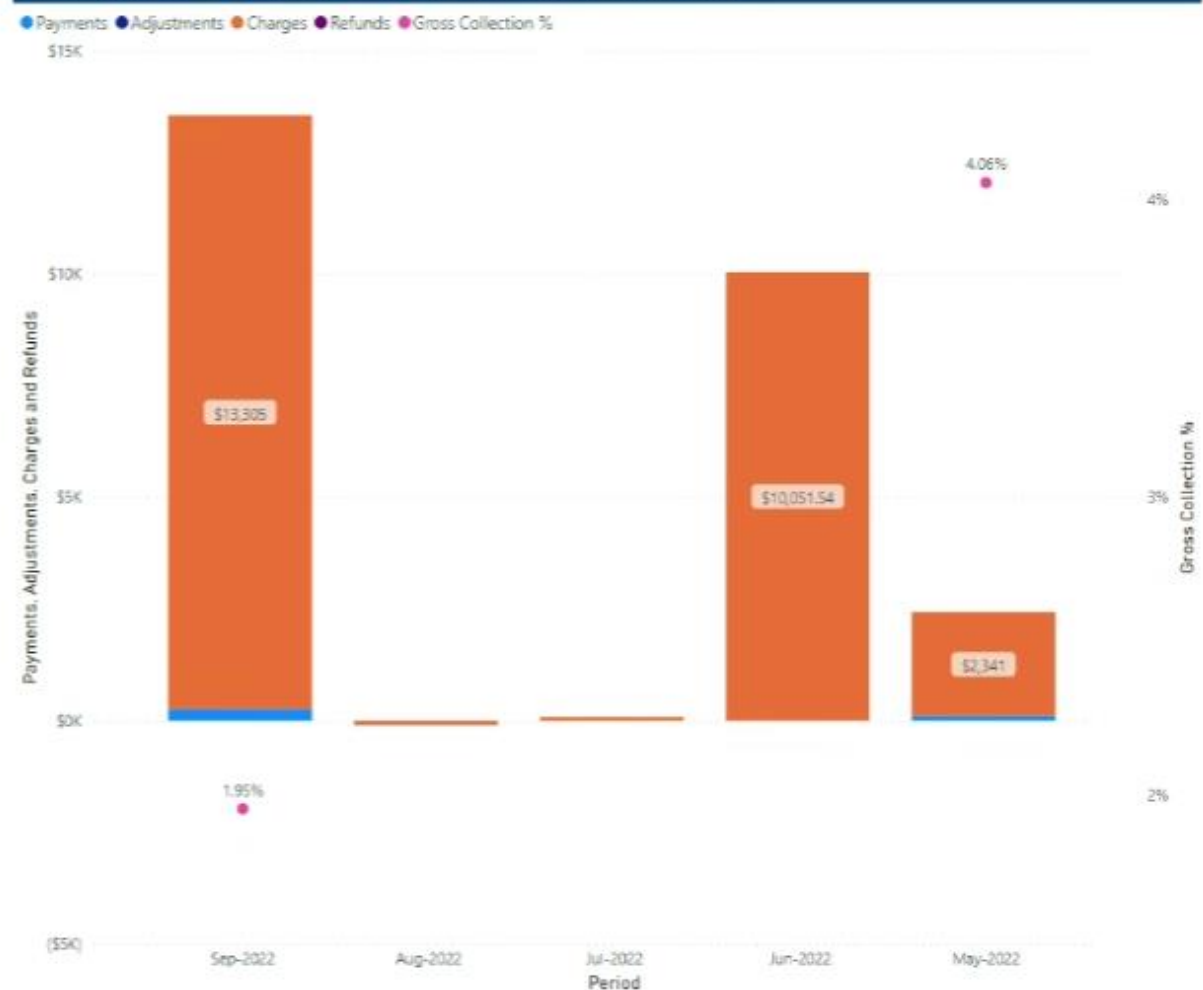
### Last Year Totals (Selected Value)

Period	Charges	Payments	Adjustments	Gross Collection %
Oct-2021				

### Profit Overview 6 Month Averages

Period	Charges	Payments	Adjustments
Sep-2022	\$2,217.50	\$43.33	
Aug-2022	(\$16.67)		\$0.00
Jul-2022	\$13.75		
Jun-2022	\$1,675.26		
May-2022	\$390.17	\$15.83	
<b>Total</b>	<b>\$4,280.01</b>	<b>\$59.17</b>	<b>\$0.00</b>

### Payments, Adjustments, Charges, Refunds and Gross Collection % by Period



# Month End Reporting

Overview of profit details.

## 2: Profit Dashboard



Practice: MTS Clinic | Location: All | Provider: All | Financial Class: All | Payer: All

### Profit Overview 6 Month Totals

Period	Charges	Payments	Adjustments	Gross Collection %
Sep-2022	\$13,305	\$260.00		1.95%
Aug-2022	(\$100)		\$0.00	
Jul-2022	\$82.5			
Jun-2022	\$10,051.54			
May-2022	\$2,341	\$95.00		4.06%
<b>Total</b>	<b>\$25,680.04</b>	<b>\$355.00</b>	<b>\$0.00</b>	<b>1.38%</b>

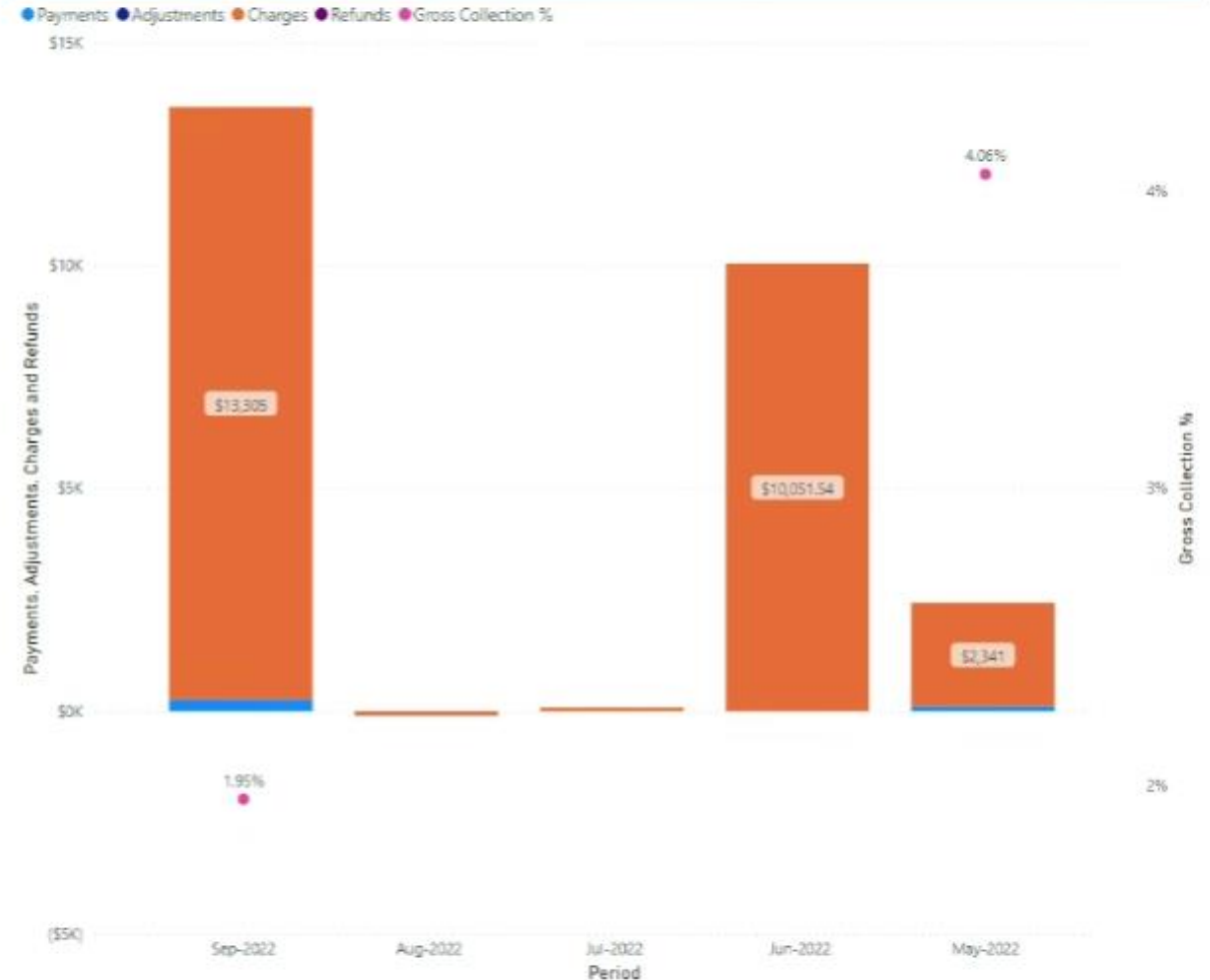
### Last Year Totals (Selected Value)

Period	Charges	Payments	Adjustments	Gross Collection %
Oct-2021				

### Profit Overview 6 Month Averages

Period	Charges	Payments	Adjustments
Sep-2022	\$2,217.50	\$43.33	
Aug-2022	(\$16.67)		\$0.00
Jul-2022	\$13.75		
Jun-2022	\$1,675.26		
May-2022	\$390.17	\$15.83	
<b>Total</b>	<b>\$4,280.01</b>	<b>\$59.17</b>	<b>\$0.00</b>

### Payments, Adjustments, Charges, Refunds and Gross Collection % by Period





# Month End Reporting

Practice level aging details (minus bad debt).

## 3: Aging Analysis



**Practice**: MTS Clinic  
**Financial Class**: All  
**Payer**: All  
**Location**: All  
**Provider**: All

2/6/2023  
Latest Process Date

Practice	0-30 Days	% LIA	31-60 Days	% LIA	61-90 Days	% LIA	91-120 Days	% LIA	121-150 Days	% LIA	151-180 Days	% LIA	181 and up	% LIA	Line Item Amount	Chq Amount	Total Adj.	Total Paid
<b>MTS Clinic</b>	<b>(\$447.27)</b>	<b>-0.36%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$123,512.84</b>	<b>1.00</b>	<b>\$123,065.57</b>	<b>\$152,654.18</b>	<b>(\$7,170.61)</b>	<b>(\$22,418.00)</b>
May-2022	(\$204.00)	-0.59%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$34,623.48	1.01	\$34,419.48	\$37,000.88	(\$675.40)	(\$1,906.00)
Feb-2023	(\$190.27)	-0.36%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$53,579.86	1.00	\$53,389.59	\$79,726.80	(\$6,410.21)	(\$19,927.00)
Jan-2022	(\$135.00)	-0.25%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$55,230.19	1.00	\$55,095.19	\$81,339.73	(\$6,370.81)	(\$19,873.73)
Nov-2022	(\$117.00)	-0.31%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$37,963.98	1.00	\$37,746.98	\$38,414.78	(\$11.80)	(\$656.00)
<b>Total</b>	<b>(\$447.27)</b>	<b>-0.36%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$123,512.84</b>	<b>1.00</b>	<b>\$123,065.57</b>	<b>\$152,654.18</b>	<b>(\$7,170.61)</b>	<b>(\$22,418.00)</b>

Provider	0-30 Days	% LIA	31-60 Days	% LIA	61-90 Days	% LIA	91-120 Days	% LIA	121-150 Days	% LIA	151-180 Days	% LIA	181 and up	% LIA	Line Item Amount	Chq Amount	Total Adj.	Total Paid
<b>MTS Clinic</b>	<b>(\$447.27)</b>	<b>100.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00</b>	<b>(\$447.27)</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>(\$447.27)</b>
Dec-2021	(\$42.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00	(\$42.00)	\$0.00	\$0.00	(\$42.00)
Jan-2022	(\$135.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00	(\$135.00)	\$0.00	\$0.00	(\$135.00)
Feb-2022	(\$53.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00	(\$53.00)	\$0.00	\$0.00	(\$53.00)
Mar-2022	(\$53.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00	(\$53.00)	\$0.00	\$0.00	(\$53.00)
Apr-2022	(\$95.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00	(\$95.00)	\$0.00	\$0.00	(\$95.00)
May-2022	(\$204.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00	(\$204.00)	\$0.00	\$0.00	(\$204.00)
Jun-2022	(\$40.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00	(\$40.00)	\$0.00	\$0.00	(\$40.00)
Aug-2022	(\$82.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00	(\$82.00)	\$0.00	\$0.00	(\$82.00)
Sep-2022	(\$95.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00	(\$95.00)	\$0.00	\$0.00	(\$95.00)
Nov-2022	(\$117.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00	(\$117.00)	\$0.00	\$0.00	(\$117.00)
Feb-2023	(\$190.27)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00	(\$190.27)	\$0.00	\$0.00	(\$190.27)
<b>Clark, Kenton PAC</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$369.00</b>	<b>1.00</b>	<b>\$369.00</b>	<b>\$369.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
Dec-2021	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$175.00	1.00	\$175.00	\$175.00	\$0.00	\$0.00
Jan-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$175.00	1.00	\$175.00	\$175.00	\$0.00	\$0.00
Apr-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$175.00	1.00	\$175.00	\$175.00	\$0.00	\$0.00
May-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$194.00	1.00	\$194.00	\$194.00	\$0.00	\$0.00
Aug-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$175.00	1.00	\$175.00	\$175.00	\$0.00	\$0.00
Sep-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$175.00	1.00	\$175.00	\$175.00	\$0.00	\$0.00
Nov-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$19.00	1.00	\$19.00	\$19.00	\$0.00	\$0.00
Feb-2023	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$175.00	1.00	\$175.00	\$175.00	\$0.00	\$0.00
<b>Cruise MD, Todd</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$7,327.70</b>	<b>1.00</b>	<b>\$7,327.70</b>	<b>\$9,167.70</b>	<b>(\$188.00)</b>	<b>(\$1,652.00)</b>
Dec-2021	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$185.00	1.00	\$185.00	\$260.00	(\$25.00)	(\$50.00)
Jan-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$715.70	1.00	\$715.70	\$2,415.70	(\$138.00)	(\$1,562.00)
Feb-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$325.00	1.00	\$325.00	\$325.00	\$0.00	\$0.00
Mar-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$1,915.00	1.00	\$1,915.00	\$1,915.00	\$0.00	\$0.00
Apr-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$510.00	1.00	\$510.00	\$585.00	(\$25.00)	(\$50.00)
<b>Total</b>	<b>(\$447.27)</b>	<b>-0.36%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$123,512.84</b>	<b>1.00</b>	<b>\$123,065.57</b>	<b>\$152,654.18</b>	<b>(\$7,170.61)</b>	<b>(\$22,418.00)</b>





# Month End Reporting

Practice level aging details for insurance only (minus bad debt).

## 4: Aging Analysis (Insurance Totals)



Practice: 
 Financial Class: 
 Payer: 
 Location: 
 Provider:

11/3/2022  
Latest Process Date

Practice	0-30 Days	% LIA	31-60 Days	% LIA	61-90 Days	% LIA	91-120 Days	% LIA	121-150 Days	% LIA	151-180 Days	% LIA	181 and up	% LIA	Line Item Amount	Chg Amount	Total Adj.	Total Paid
MTS Clinic	(\$447.27)	-0.52%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$87,005.15	1.01	\$86,557.88	\$90,609.55	(\$930.40)	(\$3,121.27)
May-2022	(\$204.00)	-0.59%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$34,623.48	1.01	\$34,419.48	\$37,000.88	(\$675.40)	(\$1,906.00)
Feb-2023	(\$190.27)	-1.13%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$17,072.17	1.01	\$16,881.90	\$17,682.17	(\$170.00)	(\$630.27)
Jan-2022	(\$135.00)	-0.73%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$18,722.50	1.01	\$18,587.50	\$19,295.10	(\$130.60)	(\$577.00)
Nov-2022	(\$117.00)	-0.31%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$37,863.98	1.00	\$37,746.98	\$38,414.78	(\$11.80)	(\$656.00)
<b>Total</b>	<b>(\$447.27)</b>	<b>-0.52%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$87,005.15</b>	<b>1.01</b>	<b>\$86,557.88</b>	<b>\$90,609.55</b>	<b>(\$930.40)</b>	<b>(\$3,121.27)</b>


Provider	0-30 Days	% LIA	31-60 Days	% LIA	61-90 Days	% LIA	91-120 Days	% LIA	121-150 Days	% LIA	151-180 Days	% LIA	181 and up	% LIA	Line Item Amount	Chg Amount	Total Adj.	Total Paid
MTS Clinic	(\$447.27)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	(\$447.27)	\$0.00	\$0.00	(\$447.27)
Dec-2021	(\$42.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	(\$42.00)	\$0.00	\$0.00	(\$42.00)
Jan-2022	(\$135.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	(\$135.00)	\$0.00	\$0.00	(\$135.00)
Feb-2022	(\$53.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	(\$53.00)	\$0.00	\$0.00	(\$53.00)
Mar-2022	(\$53.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	(\$53.00)	\$0.00	\$0.00	(\$53.00)
Apr-2022	(\$95.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	(\$95.00)	\$0.00	\$0.00	(\$95.00)
May-2022	(\$204.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	(\$204.00)	\$0.00	\$0.00	(\$204.00)
Jun-2022	(\$40.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	(\$40.00)	\$0.00	\$0.00	(\$40.00)
Aug-2022	(\$82.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	(\$82.00)	\$0.00	\$0.00	(\$82.00)
Sep-2022	(\$95.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	(\$95.00)	\$0.00	\$0.00	(\$95.00)
Nov-2022	(\$117.00)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	(\$117.00)	\$0.00	\$0.00	(\$117.00)
Feb-2023	(\$190.27)	100.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	(\$190.27)	\$0.00	\$0.00	(\$190.27)
Clark, Kenton PAC	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$369.00	1.00	\$369.00	\$369.00	\$0.00	\$0.00
Dec-2021	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$175.00	1.00	\$175.00	\$175.00	\$0.00	\$0.00
Jan-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$175.00	1.00	\$175.00	\$175.00	\$0.00	\$0.00
Apr-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$175.00	1.00	\$175.00	\$175.00	\$0.00	\$0.00
May-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$194.00	1.00	\$194.00	\$194.00	\$0.00	\$0.00
Aug-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$175.00	1.00	\$175.00	\$175.00	\$0.00	\$0.00
Sep-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$175.00	1.00	\$175.00	\$175.00	\$0.00	\$0.00
Nov-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$19.00	1.00	\$19.00	\$19.00	\$0.00	\$0.00
Feb-2023	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$175.00	1.00	\$175.00	\$175.00	\$0.00	\$0.00
Cruise MD, Todd	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$7,122.00	1.00	\$7,122.00	\$7,337.00	(\$75.00)	(\$140.00)
Dec-2021	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$185.00	1.00	\$185.00	\$260.00	(\$25.00)	(\$50.00)
Jan-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$510.00	1.00	\$510.00	\$585.00	(\$25.00)	(\$50.00)
Feb-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$325.00	1.00	\$325.00	\$325.00	\$0.00	\$0.00
Mar-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$1,915.00	1.00	\$1,915.00	\$1,915.00	\$0.00	\$0.00
Apr-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$510.00	1.00	\$510.00	\$585.00	(\$25.00)	(\$50.00)
May-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$1,667.00	1.00	\$1,667.00	\$1,742.00	(\$25.00)	(\$50.00)
Jul-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$230.00	1.00	\$230.00	\$230.00	\$0.00	\$0.00
Aug-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$185.00	1.00	\$185.00	\$260.00	(\$25.00)	(\$50.00)
Sep-2022	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$510.00	1.00	\$510.00	\$585.00	(\$25.00)	(\$50.00)
<b>Total</b>	<b>(\$447.27)</b>	<b>-0.52%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$87,005.15</b>	<b>1.01</b>	<b>\$86,557.88</b>	<b>\$90,609.55</b>	<b>(\$930.40)</b>	<b>(\$3,121.27)</b>



# Month End Reporting

Practice level aging details for self pay only (minus bad debt).

## 5: Aging Analysis (Self Pay Totals)



Practice  
MTS Clinic

Financial Class  
All

Payer  
All

Location  
All

Provider  
All

**2/6/2023**  
Latest Process Date

Practice	0-30 Days	% LIA	31-60 Days	% LIA	61-90 Days	% LIA	91-120 Days	% LIA	121-150 Days	% LIA	151-180 Days	% LIA	181-Up Days	% LIA	Line Item Amount	Chq Amount	Total Adj.	Total Paid		
<b>MTS Clinic</b>															\$35,034.38	81.04%	\$43,232.68	\$69,235.62	(\$6,243.21)	(\$19,759.73)
Dec-2021															\$715.00	\$715.00	\$0.00	\$0.00		
Jan-2022															\$35,034.38	89.85%	\$38,990.69	\$64,534.63	(\$6,245.21)	(\$19,298.73)
Feb-2022															\$1,768.00	\$1,775.00	(\$5.00)	(\$2.00)		
Mar-2022															\$1,993.00	\$2,000.00	(\$5.00)	(\$2.00)		
Apr-2022															\$2,483.00	\$2,490.00	(\$5.00)	(\$2.00)		
<b>Total</b>															\$35,034.38	81.04%	\$43,232.68	\$69,235.62	(\$6,243.21)	(\$19,759.73)

Provider	0-30 Days	% LIA	31-60 Days	% LIA	61-90 Days	% LIA	91-120 Days	% LIA	121-150 Days	% LIA	151-180 Days	% LIA	181-Up Days	% LIA	Line Item Amount	Chq Amount	Total Adj.	Total Paid		
<b>Clark, Kenton PAC</b>															\$175.00	\$175.00	\$0.00	\$0.00		
Dec-2021															\$175.00	\$175.00	\$0.00	\$0.00		
Jan-2022															\$175.00	\$175.00	\$0.00	\$0.00		
Apr-2022															\$175.00	\$175.00	\$0.00	\$0.00		
May-2022															\$175.00	\$175.00	\$0.00	\$0.00		
Aug-2022															\$175.00	\$175.00	\$0.00	\$0.00		
Sep-2022															\$175.00	\$175.00	\$0.00	\$0.00		
<b>Cruise MD, Todd</b>															\$195.70	20.27%	\$965.70	\$2,590.70	(\$113.00)	(\$1,512.00)
Dec-2021															\$110.00	\$110.00	\$0.00	\$0.00		
Jan-2022															\$195.70	42.02%	\$465.70	\$2,090.70	(\$113.00)	(\$1,512.00)
Feb-2022															\$150.00	\$150.00	\$0.00	\$0.00		
Mar-2022															\$150.00	\$150.00	\$0.00	\$0.00		
Apr-2022															\$260.00	\$260.00	\$0.00	\$0.00		
May-2022															\$610.00	\$610.00	\$0.00	\$0.00		
Jun-2022															\$195.70	95.14%	\$205.70	\$1,830.70	(\$113.00)	(\$1,512.00)
Aug-2022															\$195.70	61.99%	\$315.70	\$1,940.70	(\$113.00)	(\$1,512.00)
Sep-2022															\$260.00	\$260.00	\$0.00	\$0.00		
Feb-2023															\$195.70	95.14%	\$205.70	\$1,830.70	(\$113.00)	(\$1,512.00)
<b>Grey MD, Merideth</b>															\$21,865.71	80.78%	\$27,066.65	\$43,919.82	(\$4,113.21)	(\$12,739.96)
Dec-2021															\$430.00	\$430.00	\$0.00	\$0.00		
Jan-2022															\$21,865.71	90.37%	\$24,195.65	\$40,614.82	(\$4,115.21)	(\$12,303.96)
Feb-2022															\$875.00	\$875.00	\$0.00	\$0.00		
Mar-2022															\$1,100.00	\$1,100.00	\$0.00	\$0.00		
Apr-2022															\$1,305.00	\$1,305.00	\$0.00	\$0.00		
May-2022															\$2,676.00	\$3,110.00	\$2.00	(\$436.00)		
<b>Total</b>															\$35,034.38	81.04%	\$43,232.68	\$69,235.62	(\$6,243.21)	(\$19,759.73)



# Month End Reporting

Collection of reports for monthly closing details.

## 6: Insurance & Self Pay Aging Raw Data

Practice  
MTS Clinic

Financial Class  
All

Payer  
All

Location  
All

Provider  
All


**2/6/2023**  
Latest Process Date

Practice	Person #	MRN	Patient Name	Payer	Location	Source Type	E/I/A/B	Financial Class	DCS	Process Date	FY Period	FY Start Date	FY End Date	Statement Counter	Primary Payer
MTS Clinic			3M	Invoice	MTS Clinic	Invoice	10	Invoice	5/10/2017	5/10/2017					\$0.00
MTS Clinic			Fredrikson And Byron	Invoice	Mpls Office	Invoice	3	Invoice	12/6/2010	12/8/2010					\$0.00
MTS Clinic			Fredrikson And Byron	Invoice	Mpls Office	Invoice	3	Invoice	12/7/2010	12/8/2010					\$0.00
MTS Clinic			Meshbeshher Attorney At Law	Invoice	Mpls Office	Invoice	2	Invoice	12/8/2010	12/8/2010					\$0.00
MTS Clinic			Meshbeshher Attorney At Law	Invoice	MTS Clinic	Invoice	1	Invoice	12/7/2010	12/8/2010					\$0.00
MTS Clinic			Meshbeshher Attorney At Law	Invoice	MTS Clinic	Invoice	1	Invoice	12/8/2010	12/8/2010					\$0.00
MTS Clinic			Target	Invoice	Mpls Office	Invoice	8	Invoice	11/1/2016	5/22/2018					\$0.00
MTS Clinic			Target	Invoice	MTS Clinic	Invoice	12	Invoice	6/23/2021	6/23/2021					\$0.00
MTS Clinic			Target	Invoice	MTS Clinic	Invoice	6	Invoice	10/19/2015	10/19/2015					\$0.00
MTS Clinic			Target	Invoice	MTS Clinic	Invoice	11	Invoice	10/8/2017	10/8/2017					\$0.00
MTS Clinic			Target	Invoice	MTS Clinic	Invoice	5	Invoice	1/21/2015	1/21/2015					\$0.00
MTS Clinic			Target	Invoice	MTS Clinic	Invoice	6	Invoice	10/19/2015	10/19/2015					\$0.00
MTS Clinic			Target	Invoice	MTS Clinic	Invoice	5	Invoice	1/21/2015	1/21/2015					\$0.00
MTS Clinic	160	00000000092	America, Faith D	Americas Home PPO	North Clinic	Encounter	1623	PPO	8/13/2014	8/13/2014				0	\$165.0
MTS Clinic	319	00000000260	Anderson, Jessica	Aetna	MTS Clinic	Encounter	2403	Commercial	8/8/2016	8/25/2016				0	\$150.0
MTS Clinic	318	00000000259	Anderson, Mary	Aetna	MTS Clinic	Encounter	2489	Commercial	11/4/2016	11/10/2016				0	\$31.00
MTS Clinic	318	00000000259	Anderson, Mary	Aetna	MTS Clinic	Encounter	2490	Commercial	11/7/2016	11/10/2016				0	\$31.00
MTS Clinic	318	00000000259	Anderson, Mary	Aetna	MTS Clinic	Encounter	2491	Commercial	11/10/2016	11/10/2016				0	\$31.00
MTS Clinic	318	00000000259	Anderson, Mary	Aetna	MTS Clinic	Encounter	2402	Commercial	8/1/2016	8/25/2016				0	\$155.0
MTS Clinic	318	00000000259	Anderson, Mary	Aetna	MTS Clinic	Encounter	2489	Commercial	11/4/2016	11/10/2016				0	\$155.0
MTS Clinic	318	00000000259	Anderson, Mary	Aetna	MTS Clinic	Encounter	2490	Commercial	11/7/2016	11/10/2016				0	\$155.0
MTS Clinic	318	00000000259	Anderson, Mary	Aetna	MTS Clinic	Encounter	2491	Commercial	11/10/2016	11/10/2016				0	\$155.0
MTS Clinic	318	00000000259	Anderson, Mary	Aetna	MTS Clinic	Encounter	2489	Commercial	11/4/2016	11/10/2016				0	\$175.0
MTS Clinic	318	00000000259	Anderson, Mary	Aetna	MTS Clinic	Encounter	2490	Commercial	11/7/2016	11/10/2016				0	\$175.0
MTS Clinic	318	00000000259	Anderson, Mary	Aetna	MTS Clinic	Encounter	2491	Commercial	11/10/2016	11/10/2016				0	\$175.0
MTS Clinic	318	00000000259	Anderson, Mary	Self Pay	MTS Clinic	Encounter	2488	Self Pay	11/1/2016	11/10/2016				3	\$0.00
MTS Clinic	318	00000000259	Anderson, Mary	Self Pay	MTS Clinic	Encounter	2488	Self Pay	11/1/2016	11/10/2016				3	\$0.00
MTS Clinic	318	00000000259	Anderson, Mary	Self Pay	MTS Clinic	Encounter	2488	Self Pay	11/1/2016	11/10/2016				3	\$0.00
MTS Clinic	67	00000000056	Applebee, Aaron	Blue Cross BlueShield	MTS Clinic	Encounter	847	BCBS	11/8/2011	1/11/2017				2	\$50.00
MTS Clinic	67	00000000056	Applebee, Aaron	Self Pay	St Paul Office	Encounter	3321	Self Pay	2/16/2019	2/16/2019				0	\$0.00
MTS Clinic	127	00000000112	Arthur, Cassandra L	Aetna	MTS Clinic	Encounter	669	Commercial		9/2/2011				0	
MTS Clinic	260	00000000235	Austin, Powell	Auto Geico Insurance	MTS Clinic	Encounter	2759	Auto	5/24/2017	5/24/2017				0	\$31.00
MTS Clinic	260	00000000235	Austin, Powell	Auto Geico Insurance	MTS Clinic	Encounter	2759	Auto	5/24/2017	5/24/2017				0	\$75.00
MTS Clinic	260	00000000235	Austin, Powell	Auto Geico Insurance	MTS Clinic	Encounter	2759	Auto	5/24/2017	5/24/2017				0	\$165.00

# Month End Reporting

Collection of reports for monthly closing details.

## 7: Aging Analysis (Bad Debt Totals)



Practice: MTS Clinic

Location: All

Financial Class: All

Payer: All

FY Period: All

Provider: All

**5/4/2020**  
Latest Process Date

Practice	Primary Payer Amount	Secondary Payer Amount	Tertiary Payer Amount	Patient Amount	Bad Debt Amount	Charge Amount	Adjustment Amount	Pay Amount	Count	0-30	% LIA	31-60	% LIA	61-90	% LIA	91-120	% LIA	121-150	% LIA	151-180	% LIA	181-up	% LIA
MTS Clinic	\$0.00	\$0.00	\$0.00	\$22,710.41	\$22,710.41	\$31,784.66	(\$896.75)	(\$8,177.50)	240.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$22,710.41	100.00%
<b>Total</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$22,710.41</b>	<b>\$22,710.41</b>	<b>\$31,784.66</b>	<b>(\$896.75)</b>	<b>(\$8,177.50)</b>	<b>240.00</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$22,710.41</b>	<b>100.00%</b>

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Location	Primary Payer Amount	Secondary Payer Amount	Tertiary Payer Amount	Patient Amount	Bad Debt Amount	Charge Amount	Adjustment Amount	Pay Amount	Count	0-30	% LIA	31-60	% LIA	61-90	% LIA	91-120	% LIA	121-150	% LIA	151-180	% LIA
North Clinic	\$0.00	\$0.00	\$0.00	\$27.18	\$27.18	\$126.18	(\$2.50)	(\$96.50)	3.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%
Mpls Office	\$0.00	\$0.00	\$0.00	\$1,276.00	\$1,276.00	\$1,603.50	(\$27.50)	(\$300.00)	10.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%
Westside Clinic	\$0.00	\$0.00	\$0.00	\$25.00	\$25.00	\$500.00	(\$100.00)	(\$375.00)	1.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%
Elk River Office	\$0.00	\$0.00	\$0.00	\$608.37	\$608.37	\$1,317.87	(\$100.00)	(\$609.50)	10.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%
St Paul Office	\$0.00	\$0.00	\$0.00	\$455.39	\$455.39	\$1,680.39	(\$273.00)	(\$952.00)	15.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%
MTS Hospital	\$0.00	\$0.00	\$0.00	\$825.00	\$825.00	\$2,155.00	(\$200.00)	(\$1,130.00)	2.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%
<b>Total</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$22,710.41</b>	<b>\$22,710.41</b>	<b>\$31,784.66</b>	<b>(\$896.75)</b>	<b>(\$8,177.50)</b>	<b>240.00</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>

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Provider	Primary Payer Amount	Secondary Payer Amount	Tertiary Payer Amount	Patient Amount	Bad Debt Amount	Charge Amount	Adjustment Amount	Pay Amount	Count	0-30	% LIA	31-60	% LIA	61-90	% LIA	91-120	% LIA	121-150	% LIA	151-180	% LIA
Jones MD, Tom K	\$0.00	\$0.00	\$0.00	\$1,226.57	\$1,226.57	\$1,226.57	\$0.00	\$0.00	10.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%
Smith MD, John	\$0.00	\$0.00	\$0.00	\$3,382.50	\$3,382.50	\$3,557.50	(\$40.00)	(\$135.00)	6.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%
Weaver, Carrie	\$0.00	\$0.00	\$0.00	\$9,177.00	\$9,177.00	\$9,512.00	(\$100.00)	(\$235.00)	101.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%
Cruise MD, Todd	\$0.00	\$0.00	\$0.00	\$218.18	\$218.18	\$616.18	(\$103.50)	(\$294.50)	7.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%
Yang MD, Christina	\$0.00	\$0.00	\$0.00	\$310.00	\$310.00	\$810.00	(\$100.00)	(\$400.00)	3.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%
Stevens MD, Isabelle	\$0.00	\$0.00	\$0.00	\$328.87	\$328.87	\$1,028.87	(\$190.00)	(\$510.00)	8.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%
Weaver MD, Carrie	\$0.00	\$0.00	\$0.00	\$779.50	\$779.50	\$2,345.00	(\$245.00)	(\$1,320.50)	4.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%
Mcgraw PhD, Phil	\$0.00	\$0.00	\$0.00	\$1,625.00	\$1,625.00	\$2,855.00	\$155.00	(\$1,385.00)	27.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%
Grey MD, Merideth	\$0.00	\$0.00	\$0.00	\$5,662.79	\$5,662.79	\$9,833.54	(\$273.25)	(\$3,897.50)	74.00	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%
<b>Total</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$22,710.41</b>	<b>\$22,710.41</b>	<b>\$31,784.66</b>	<b>(\$896.75)</b>	<b>(\$8,177.50)</b>	<b>240.00</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>	<b>\$0.00</b>	<b>0.00%</b>



# Month End Reporting

Collection of reports for monthly closing details.

## 8: Bad Debt Aging Raw Data


Practice: 
Location: 
Financial Class: 
Payer: 
FY Period: 
Provider: 
5/4/2020  
Latest Process Date

Practice	Financial Class	Person #	MRN	Patient Name	Payer	Location	Department	E/V/A/B	Source Type	DOS	Process Date	FY Period	FY Start Date	FY End Date	Statement Counter	SIM	COB	Primary Payer Amount
MTS Clinic	Self Pay	9	2	Test, Patient A	Self Pay	Elk River Office		1202	Encounter	4/3/2013	4/21/2013				11	74150	P	\$0.00
MTS Clinic	Self Pay	9	2	Test, Patient A	Self Pay	Elk River Office		1202	Encounter	8/2/2017	8/2/2017				11	LF	P	\$0.00
MTS Clinic	Self Pay	9	2	Test, Patient A	Self Pay	Elk River Office		1202	Encounter	10/3/2017	10/3/2017				11	LF	P	\$0.00
MTS Clinic	Self Pay	9	2	Test, Patient A	Self Pay	Elk River Office		1202	Encounter	10/3/2017	10/3/2017				11	LF	P	\$0.00
MTS Clinic	Self Pay	9	2	Test, Patient A	Self Pay	Elk River Office		1202	Encounter	10/4/2017	10/4/2017				11	LF	P	\$0.00
MTS Clinic	Self Pay	39	29	Test, Ava	Self Pay	Elk River Office		3485	Encounter	3/27/2020	3/27/2020				1	99212	P	\$0.00
MTS Clinic	Self Pay	51	40	Busch, Jessica S (Jessie)	Self Pay	Elk River Office	Office Visit	433	Encounter	4/4/2011	7/19/2013				0	99213	P	\$0.00
MTS Clinic	Self Pay	55	42	Test, Tatum	Self Pay	Elk River Office		2128	Encounter	2/11/2016	2/11/2016				0	99214	P	\$0.00
MTS Clinic	Self Pay	49	46	Test, Betty Ann	Self Pay	Elk River Office	Medicare ENC Rate	2023	Encounter	8/18/2015	9/30/2015				3	99211	P	\$0.00
MTS Clinic	Self Pay	49	46	Test, Betty Ann	Self Pay	Elk River Office	Medicare ENC Rate	2287	Encounter	7/12/2016	7/12/2016				0	99211	P	\$0.00
MTS Clinic	Self Pay	39	29	Test, Ava	Self Pay	Mpls Office		3398	Encounter	6/17/2019	6/17/2019				3	90647	P	\$0.00
MTS Clinic	Self Pay	39	29	Test, Ava	Self Pay	Mpls Office	Office Visit	3398	Encounter	6/17/2019	6/17/2019				3	99213	P	\$0.00
MTS Clinic	Self Pay	100	101	Deedles, Timothy S	Self Pay	Mpls Office	Lab	654	Encounter	9/1/2011	9/2/2011				21	80061	P	\$0.00
MTS Clinic	Self Pay	100	101	Deedles, Timothy S	Self Pay	Mpls Office		654	Encounter	9/1/2011	9/2/2011				21	99212	P	\$0.00
MTS Clinic	Self Pay	104	104	Harris, Melanie H	Self Pay	Mpls Office	Office Visit	658	Encounter	9/1/2011	9/2/2011				4	99202	P	\$0.00
MTS Clinic	Self Pay	209	161	Test Clark, Ariana	Self Pay	Mpls Office	Office Visit	2021	Encounter	8/12/2015	7/18/2016				2	99213	P	\$0.00
MTS Clinic	Self Pay	289	227	Testing Hotfix, Five Eight	Self Pay	Mpls Office		1977	Encounter	7/29/2015	7/29/2015				5	86005	P	\$0.00
MTS Clinic	Self Pay	289	227	Testing Hotfix, Five Eight	Self Pay	Mpls Office	Office Visit	1977	Encounter	7/29/2015	7/29/2015				5	99213	P	\$0.00
MTS Clinic	Self Pay	289	227	Testing Hotfix, Five Eight	Self Pay	Mpls Office		1977	Encounter	7/29/2015	7/29/2015				5	99502	P	\$0.00
MTS Clinic	Self Pay	289	227	Testing Hotfix, Five Eight	Self Pay	Mpls Office		1977	Encounter	7/29/2015	7/29/2015				5	99502	P	\$0.00
MTS Clinic	Self Pay	10	3	Test, Patient B	Self Pay	MTS Clinic		1994	Encounter	7/30/2015	7/30/2015				0	99214	P	\$0.00
MTS Clinic	Self Pay	20	11	TestTest, Matthew W	Self Pay	MTS Clinic		523	Encounter	6/27/2011	6/27/2011				21	99212	P	\$0.00
MTS Clinic	Self Pay	26	16	Earnhardt Jr, Dale	Self Pay	MTS Clinic		536	Encounter	7/12/2011	7/21/2011				22	99215	P	\$0.00
MTS Clinic	Self Pay	39	29	Test, Ava	Self Pay	MTS Clinic		1062	Encounter	12/10/2012	12/10/2012				7	36415	P	\$0.00
MTS Clinic	Self Pay	39	29	Test, Ava	Self Pay	MTS Clinic	Medicare ENC Rate	1062	Encounter	12/10/2012	12/10/2012				7	99211	P	\$0.00
MTS Clinic	Self Pay	39	29	Test, Ava	Self Pay	MTS Clinic	Office Visit	2704	Encounter	3/14/2017	3/14/2017				3	99202	P	\$0.00
MTS Clinic	Self Pay	39	29	Test, Ava	Self Pay	MTS Clinic		3203	Encounter	12/11/2018	12/11/2018				1	J7298	P	\$0.00
MTS Clinic	Self Pay	49	46	Test, Betty Ann	Self Pay	MTS Clinic	Office Visit	1868	Encounter	5/13/2015	5/15/2015				3	99213	P	\$0.00
MTS Clinic	Self Pay	49	46	Test, Betty Ann	Self Pay	MTS Clinic	Medicare ENC Rate	1957	Encounter	7/24/2015	8/5/2015				4	99211	P	\$0.00
MTS Clinic	Self Pay	49	46	Test, Betty Ann	Self Pay	MTS Clinic		1957	Encounter	7/24/2015	8/9/2015				4	J0120	P	\$0.00
MTS Clinic	Self Pay	49	46	Test, Betty Ann	Self Pay	MTS Clinic	Office Visit	2082	Encounter	10/26/2015	11/18/2015				2	99213	P	\$0.00
MTS Clinic	Self Pay	49	46	Test, Betty Ann	Self Pay	MTS Clinic	Lab	2088	Encounter	8/12/2015	8/5/2015				4	85002	P	\$0.00
MTS Clinic	Self Pay	49	46	Test, Betty Ann	Self Pay	MTS Clinic	Office Visit	2088	Encounter	8/12/2015	8/5/2015				4	99213	P	\$0.00

# Month End Reporting

Collection of reports for monthly closing details.

## 9: Monthly Changes in AR



**Practice** 
**Provider** 
**Location** 
**FY Period**

**10/31/2023**  
Latest Process Run Date

Practice	Beginning AR	Charge Amount	Net Charge Amount	Adjustment Amount	Net Adjustment Amount	Paid Amount	Refund Amount	Ending AR
Plymouth Providers	2,796.00	0.00	0.00	0.00	0.00	0.00	0.00	2,796.00
<b>Total</b>	<b>2,796.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>2,796.00</b>

Financial Class	Beginning AR	Charge Amount	Net Charge Amount	Adjustment Amount	Net Adjustment Amount	Paid Amount	Refund Amount	Ending AR
BCBS	155.00	0.00	0.00	0.00	0.00	0.00	0.00	155.00
Commercial	72.00	0.00	0.00	0.00	0.00	0.00	0.00	72.00
Medica	42.00	0.00	0.00	0.00	0.00	0.00	0.00	42.00
Medicaid	27.00	0.00	0.00	0.00	0.00	0.00	0.00	27.00
Medicare	2,050.00	0.00	0.00	0.00	0.00	0.00	0.00	2,050.00
Self Pay	450.00	0.00	0.00	0.00	0.00	0.00	0.00	450.00
<b>Total</b>	<b>2,796.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>2,796.00</b>

Department	Beginning AR	Ending AR
Lab	20.00	20.00
Medicare ENC Rate	95.00	95.00
Office Visit	434.00	434.00
<b>Total</b>	<b>2,796.00</b>	<b>2,796.00</b>

Payer	Beginning AR	Charge Amount	Net Charge Amount	Adjustment Amount	Net Adjustment Amount	Paid Amount	Refund Amount	Ending AR
Blue Cross Blue Shield	155.00	0.00	0.00	0.00	0.00	0.00	0.00	155.00
Medica	42.00	0.00	0.00	0.00	0.00	0.00	0.00	42.00
Medicare Part A Split Billing	1,600.00	0.00	0.00	0.00	0.00	0.00	0.00	1,600.00
Medicare Part B Split Billing	450.00	0.00	0.00	0.00	0.00	0.00	0.00	450.00
MN Medicaid	27.00	0.00	0.00	0.00	0.00	0.00	0.00	27.00
Patient Choice	72.00	0.00	0.00	0.00	0.00	0.00	0.00	72.00
Self Pay	450.00	0.00	0.00	0.00	0.00	0.00	0.00	450.00
<b>Total</b>	<b>2,796.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>2,796.00</b>

Location	Beginning AR	Ending AR
Elk River Office	512.00	512.00
Mpls Office	67.00	67.00
MTS Clinic	2,050.00	2,050.00
North Clinic	135.00	135.00
South Clinic	32.00	32.00
<b>Total</b>	<b>2,796.00</b>	<b>2,796.00</b>

Provider	Beginning AR	Charge Amount	Net Charge Amount	Adjustment Amount	Net Adjustment Amount	Paid Amount	Refund Amount	Ending AR
Cruise MD, Todd	315.00	0.00	0.00	0.00	0.00	0.00	0.00	315.00
Grey MD, Meredith	2,481.00	0.00	0.00	0.00	0.00	0.00	0.00	2,481.00
<b>Total</b>	<b>2,796.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>2,796.00</b>





# Month End Reporting

Collection of reports for monthly closing details.

## 10: Monthly Changes in AR Raw Data



**10/31/2023**  
Latest Process Run Date

Practice	Location	MRN	Provider	Source Type	Encounter Status	Process Date	FY Period	FY Start Date	FY End Date	Financial Class	Primary Payer	Secondary Payer	Tertiary Payer
Plymouth Providers	Elk River Office		Cruise MD, Todd	Encounter	Bad Debt	7/11/2011				Self Pay	Self Pay		
Plymouth Providers	Elk River Office		Cruise MD, Todd	Encounter	Bad Debt	7/11/2011				Self Pay	Self Pay		
Plymouth Providers	Elk River Office		Grey MD, Merideth	Encounter	Billed	10/10/2012				BCBS	Blue Cross Blue Shield		
Plymouth Providers	Elk River Office		Grey MD, Merideth	Encounter	Billed	12/28/2016				Medica	Medica		
Plymouth Providers	Elk River Office		Grey MD, Merideth	Encounter	History	10/10/2012				Self Pay	Self Pay		
Plymouth Providers	Elk River Office		Grey MD, Merideth	Encounter	History	5/11/2016				Self Pay	Self Pay		
Plymouth Providers	Mpls Office		Grey MD, Merideth	Encounter	Billed	4/19/2016				Commercial	Patient Choice		
Plymouth Providers	Mpls Office		Grey MD, Merideth	Encounter	Billed	12/28/2016				Medicaid	MN Medicaid		
Plymouth Providers	Mpls Office		Grey MD, Merideth	Encounter	Billed	12/30/2016				Medicaid	MN Medicaid		
Plymouth Providers	MTS Clinic		Cruise MD, Todd	Encounter	History	1/12/2015				Medicare	Medicare Part B Split Billing		
Plymouth Providers	MTS Clinic		Grey MD, Merideth	Encounter	Billed	1/13/2015				Medicare	Medicare Part A Split Billing		
Plymouth Providers	MTS Clinic		Grey MD, Merideth	Encounter	Billed	1/13/2015				Medicare	Medicare Part A Split Billing		
Plymouth Providers	MTS Clinic		Grey MD, Merideth	Encounter	Billed	1/13/2015				Medicare	Medicare Part A Split Billing		
Plymouth Providers	MTS Clinic		Grey MD, Merideth	Encounter	Billed	1/13/2015				Medicare	Medicare Part A Split Billing		
Plymouth Providers	MTS Clinic		Grey MD, Merideth	Encounter	Billed	1/13/2015				Medicare	Medicare Part B Split Billing		
Plymouth Providers	MTS Clinic		Grey MD, Merideth	Encounter	Billed	1/13/2015				Medicare	Medicare Part B Split Billing		
Plymouth Providers	North Clinic		Grey MD, Merideth	Encounter	Bad Debt	10/10/2012				Self Pay	Self Pay		
Plymouth Providers	North Clinic		Grey MD, Merideth	Encounter	Bad Debt	10/10/2012				Self Pay	Self Pay		
Plymouth Providers	North Clinic		Grey MD, Merideth	Encounter	History	10/10/2012				Self Pay	Self Pay		
Plymouth Providers	North Clinic		Grey MD, Merideth	Encounter	History	5/11/2016				Self Pay	Self Pay		
Plymouth Providers	South Clinic		Grey MD, Merideth	Encounter	Billed	12/28/2016				Commercial	Patient Choice		
Plymouth Providers	South Clinic		Grey MD, Merideth	Encounter	Billed	12/28/2016				Commercial	Patient Choice		



# Month End Reporting

Monthly charges by process date.

## 11: Monthly Charges



Practice: All | Location: All | Financial Class: All | Payer: All | Provider: All | FY Period: All | Process Date: Last 30 Months (Ca...)

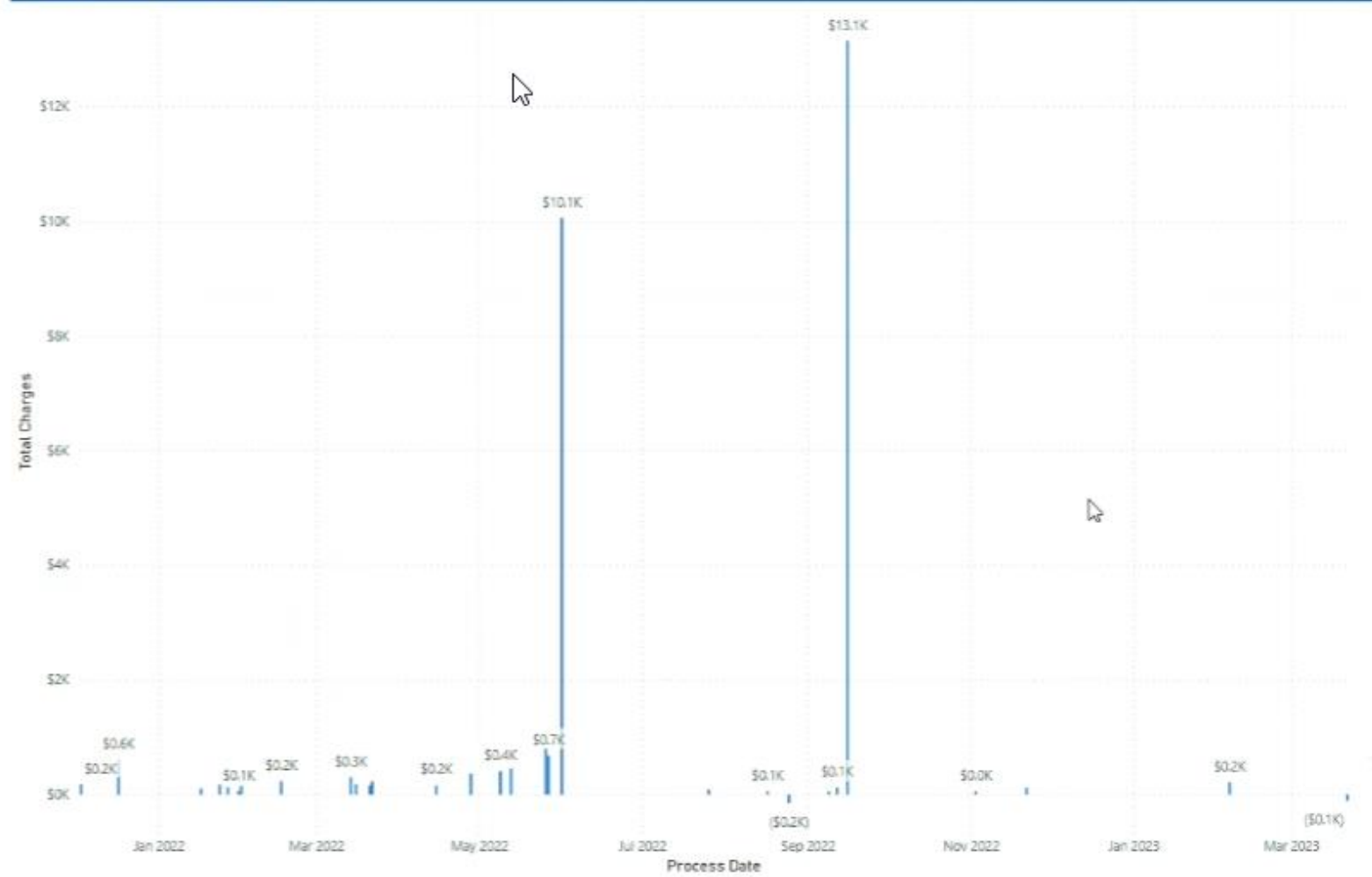
5/1/2022

Location	Total Charges
MTS Clinic	\$27,113.04
Mpls Office	\$1,110
North Clinic	\$297
South Clinic	\$175
Elk River Office	\$155
*Elk River Office	\$55
<b>Total</b>	<b>\$28,905.04</b>

Financial Class	Total Charges
BCBS	\$1,075
Commercial	\$683
Health Partners	\$1,325
Medica	\$497
Medicaid	\$406
Medicare	\$13,850
Self Pay	\$10,176.54
Work Comp	\$892.5
<b>Total</b>	<b>\$28,905.04</b>

Provider	Total Charges
Grey MD, Mendeth	\$10,681.54
Yang MD, Christina	\$8,761.5
Weaver MD, Carrie	\$6,950
Mcgraw PhD, Phil	\$1,620
Cruise MD, Todd	\$675
Jones MD, Tom K	\$317
White PA, Heather	\$50
	(\$150)
<b>Total</b>	<b>\$28,905.04</b>

Total Charges by Process Date



# Month End Reporting

Collection of reports for monthly closing details.

## 12: Monthly Charges Raw Data



All  All  All  All  All  All  Last 30 Months (Ca...)

5/1/2021 - 10/31/2023

E/I	Sequence #	Process Date	DOS	FY Period	FY Start Date	FY End Date	Charge Amount	Count	CPT Code	CPT Description	Modifier 1	Modifier 2	Modifier 3	Modifier 4	Location	Rendering	Referring
3268	3	1/17/2022	11/10/2015				\$100	1.00	Q0508	Mis sup/acc imp vad					MTS Clinic	Grey MD, Mendeth	
7	3	8/25/2022	7/12/2016	Aug-2022	8/1/2022	8/31/2022	(\$150)	-1.00	99213	Office/outpatient visit, est, exp prob	LR				MTS Clinic		
2877	1	3/14/2022	9/15/2017				\$150	1.00	99213	Office/outpatient visit, est, exp prob	LR				MTS Clinic	Grey MD, Merideth	
3834	1	3/14/2022	6/23/2021				\$150	1.00	99213	Office/outpatient visit, est, exp prob					MTS Clinic	Grey MD, Merideth	
3870	1	1/24/2022	7/21/2021				\$175	1.00	99213	Office/outpatient visit, est, exp prob	LR				MTS Clinic	Yang MD, Christina	
4845	1	2/1/2022	10/12/2021				\$95	1.00	99211	Office/outpatient visit, est, minimal					Mpls Office	Jones MD, Tom K	
4868	1	12/3/2021	12/3/2021				\$175	1.00	99213	Office/outpatient visit, est, exp prob	LR				North Clinic	Yang MD, Christina	Yang, Chri
4871	1	12/17/2021	12/17/2021				\$600	1.00	66984	Remove cataract, insert lens, extracapsular					MTS Clinic	Yang MD, Christina	Yang, Chri
4886	1	1/31/2022	1/25/2022				\$55	1.00	99201	Office/outpatient visit, new, problem focused					*Elk River Office	Grey MD, Mendeth	
4889	1	2/16/2022	1/25/2022				\$75	1.00	99211	Office/outpatient visit, est, minimal					North Clinic	Grey MD, Merideth	Grey, Meri
4892	1	1/27/2022	1/27/2022				\$70	1.00	92014	Comprehensive eye exam, established patient					MTS Clinic	Yang MD, Christina	Yang, Chri
4892	2	1/27/2022	1/27/2022				\$50	1.00	L1270	ABDOMINAL PAD					MTS Clinic	Grey MD, Merideth	Yang, Chri
4892	3	5/27/2022	1/27/2022				\$75	1.00	J3100	TENECTEPLASE INJECTION					MTS Clinic	Yang MD, Christina	Yang, Chri
4892	4	5/27/2022	1/27/2022				\$100	1.00	J3470	HYALURONIDASE INJECTION					MTS Clinic	Yang MD, Christina	Yang, Chri
4894	1	2/1/2022	2/1/2022				\$50	1.00	99211TS	Office Visit					MTS Clinic	Yang MD, Christina	Yang, Chri
4921	1	2/16/2022	2/16/2022				\$155	1.00	99214	Office/outpatient visit, est, detailed					MTS Clinic	Yang MD, Christina	Yang, Chri
4942	1	3/16/2022	2/28/2022				\$175	1.00	99213	Office/outpatient visit, est, exp prob	LR				MTS Clinic	Cruise MD, Todd	
4968	1	3/21/2022	3/21/2022				\$155	1.00	99214	Office/outpatient visit, est, detailed	LL				Mpls Office	Yang MD, Christina	Yang, Chri
4970	1	3/22/2022	3/22/2022				\$75	1.00	0005T	Cerebrovasc artery stent, percu, initial					MTS Clinic	Weaver MD, Carrie	Weaver M
4970	2	3/22/2022	3/22/2022				\$75	1.00	0021T	Insert transcerv/vaginal fetal oximtry sensor					MTS Clinic	Weaver MD, Carrie	Weaver M
4970	3	3/22/2022	3/22/2022				\$75	1.00	74328	X-ray for bile duct endoscopy, 5&l					MTS Clinic	Weaver MD, Carrie	Weaver M
4977	1	4/15/2022	4/15/2022				\$155	1.00	99214	Office/outpatient visit, est, detailed					Elk River Office	Weaver MD, Carrie	Weaver M
4996	1	4/28/2022	4/28/2022				\$175	1.00	99213	Office/outpatient visit, est, exp prob	LR				MTS Clinic	Mcgraw PhD, Phil	Mcgraw, P
4996	2	4/28/2022	4/28/2022				\$100	1.00	G8947	1 or more neuropsych					MTS Clinic	Mcgraw PhD, Phil	Mcgraw, P
4996	3	4/28/2022	4/28/2022				\$85	1.00	80048	Metabolic panel, basic					MTS Clinic	Mcgraw PhD, Phil	Mcgraw, P
5017	1	5/9/2022	5/9/2022				\$175	1.00	99213	Office/outpatient visit, est, exp prob	LR				MTS Clinic	Yang MD, Christina	Mcgraw, P
5017	2	5/9/2022	5/9/2022				\$31	1.00	80061	Lipid panel					MTS Clinic	Yang MD, Christina	Mcgraw, P
5017	3	5/9/2022	5/9/2022				\$200	1.00	70010	Contrast x-ray of brain, R&l					MTS Clinic	Yang MD, Christina	Mcgraw, P
5018	1	5/13/2022	5/13/2022				\$400	2.00	99213	Office/outpatient visit, est, exp prob	TC				MTS Clinic	Mcgraw PhD, Phil	Mcgraw, P
5018	2	5/13/2022	5/13/2022				\$50	1.00	55110	Exploration of scrotum					MTS Clinic	Mcgraw PhD, Phil	Mcgraw, P
5037	1	5/26/2022	5/26/2022				\$450	15.00	J0120	TETRACYCLIN INJECTION					Mpls Office	Mcgraw PhD, Phil	Mcgraw, P
5037	2	5/26/2022	5/26/2022				\$360	30.00	J0151	ADENOSINE INJECTION					Mpls Office	Mcgraw PhD, Phil	Mcgraw, P
5039	1	5/27/2022	5/27/2022				\$500	1.00	92134	CPTR. OPTHX DX IMG POST SEGMENT					MTS Clinic	Cruise MD, Todd	
5043	1	6/1/2022	6/1/2022				\$175	1.00	99215	Office/outpatient visit, est, high complex					MTS Clinic	Grey MD, Mendeth	
5043	2	6/1/2022	6/1/2022				\$9,876.54	1.00	92250	Fundus photography					MTS Clinic	Grey MD, Merideth	
5071	1	7/26/2022	7/26/2022	Jul-2022	7/1/2022	7/31/2022	\$82.5	1.00	99202	Office/outpatient visit, new, expanded prob					MTS Clinic	Yang MD, Christina	Yang, Chri
5081	1	8/17/2022	8/17/2022	Aug-2022	8/1/2022	8/31/2022	\$50	1.00	G0438	Ppps, initial visit					MTS Clinic	Grey MD, Mendeth	Grey, Meri
<b>Total</b>							<b>\$28,905.04</b>										





# Month End Reporting

Collection of reports for monthly closing details.

## 13: Monthly Payments



Practice: All | Location: All | Financial Class: All | Payer: All | Provider: All | FY Period: All | Process Date: Last 36 Months | 11/1/2020 - 10/31/2023

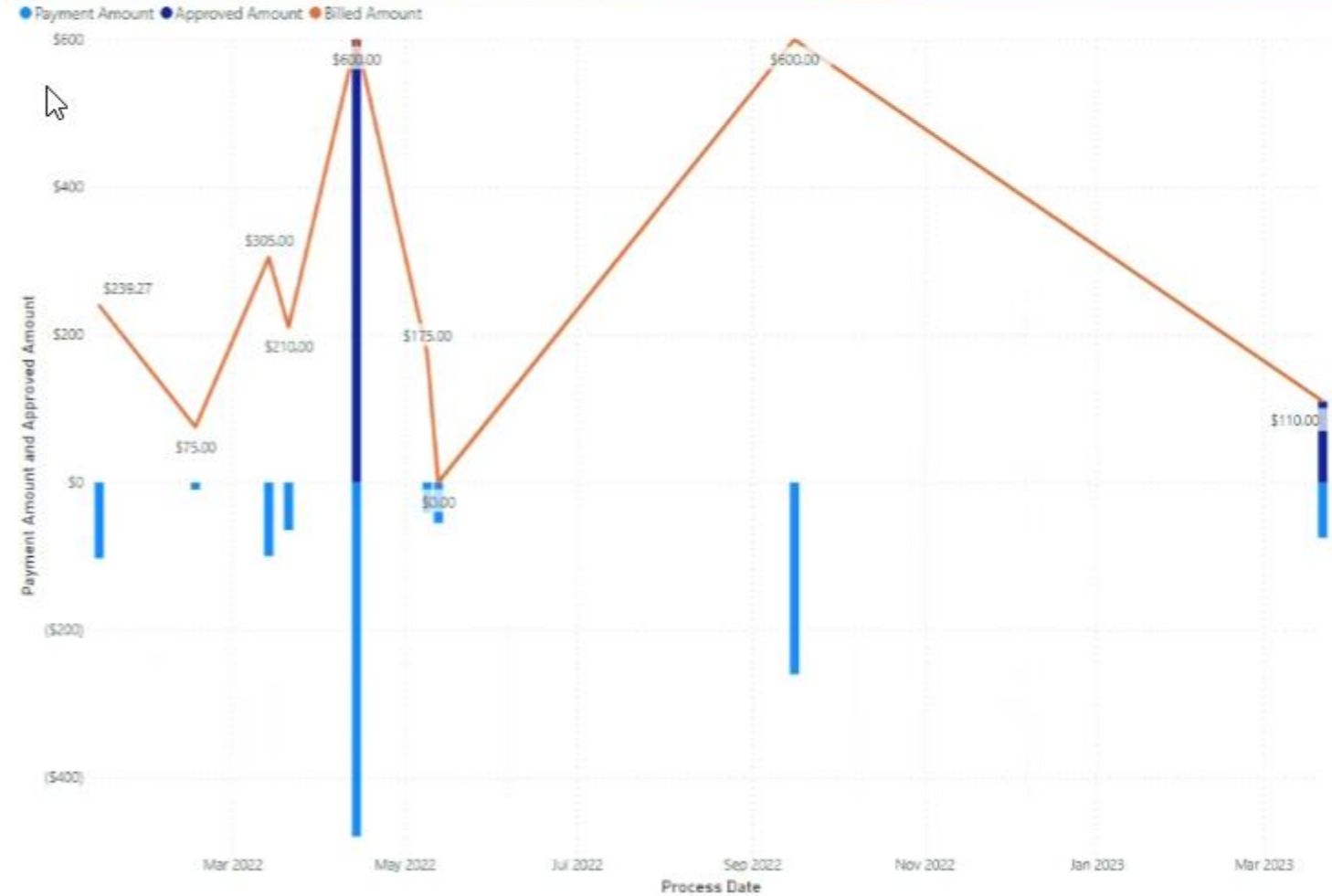
Financial Class	Total Payments
<Unapplied>	\$0.00
BCBS	(\$137.00)
Health Partners	(\$740.00)
Medica	(\$45.00)
Medicaid	(\$40.00)
Medicare	(\$235.00)
Self Pay	\$9.27
<b>Total</b>	<b>(\$1,187.73)</b>

Payer	Total Payments
<Unapplied>	\$0.00
Blue Cross Blue Shield	(\$137.00)
Health Partners	(\$740.00)
Humana Gold Sr Plan	(\$100.00)
Medica	(\$45.00)
Medicare	(\$60.00)
MN Medicaid	(\$40.00)
Self Pay	\$9.27
UCare For Seniors	(\$75.00)
<b>Total</b>	<b>(\$1,187.73)</b>

Provider	Total Payments
<No Rendering>	\$45.00
Grey MD, Merideth	(\$162.00)
Jones MD, Tom K	(\$75.00)
Smith MD, John	\$9.27
<b>Total</b>	<b>(\$1,187.73)</b>

FY Period	Total Payments
Mar-2023	(\$75.00)
Sep-2022	(\$260.00)
	(\$852.73)
<b>Total</b>	<b>(\$1,187.73)</b>


Payment Amount, Approved Amount and Billed Amount by Process Date



# Month End Reporting

Collection of reports for monthly closing details.

## 14: Monthly Payments Raw Data



Practice: All

Location: All

Financial Class: All

Payer: All

Provider: All

FY Period: All

Process Date: Last 36 Months (C...)

11/1/2020 - 10/31/2023

Practice	Provider	Referring Provider	Financial Class	Payer	Location	Process Date	DOS	FY Period	FY Begin Date	FY End Date	E/I/A/B	Person #	MRN	Source Type	Billed Amount	Approved Amount	T
MTS Clinic	<No Rendering>		<Unapplied>	<Unapplied>		3/14/2022						160 217		Account	\$0.00	\$0.00	3
MTS Clinic	<No Rendering>		<Unapplied>	<Unapplied>		3/14/2022						160 217		Account	\$0.00	\$0.00	3
MTS Clinic	Grey MD, Merideth		BCBS	Blue Cross Blue Shield	*Elk River Office	3/21/2022	1/25/2022					4886 39	29	Encounter	\$55.00	\$0.00	3
MTS Clinic	Grey MD, Merideth		BCBS	Blue Cross Blue Shield	MTS Clinic	1/13/2022	10/4/2017					217 290	315	Account	\$155.00	\$0.00	1
MTS Clinic	<No Rendering>	Mcgraw, Phil	BCBS	Blue Cross Blue Shield	MTS Clinic	5/13/2022						5019 39	29	Encounter	\$0.00	\$0.00	5
MTS Clinic	Weaver MD, Carrie	Weaver MD, Carrie	BCBS	Blue Cross Blue Shield	MTS Clinic	1/13/2022	1/21/2019					3235 290	315	Encounter	\$5.00	\$0.00	1
MTS Clinic	Weaver MD, Carrie	Weaver MD, Carrie	BCBS	Blue Cross Blue Shield	MTS Clinic	1/13/2022	1/21/2019					3235 290	315	Encounter	\$70.00	\$0.00	1
MTS Clinic	Yang MD, Christina	Yang, Christina	Health Partners	Health Partners	MTS Clinic	4/14/2022	12/17/2021					4871 356	299	Encounter	\$600.00	\$600.00	3
MTS Clinic	Yang MD, Christina	Yang, Christina	Health Partners	Health Partners	MTS Clinic	9/16/2022	12/17/2021	Sep-2022	9/1/2022	9/30/2022		4871 356	299	Encounter	\$600.00	\$0.00	9
MTS Clinic	<No Rendering>		Medicare	Humana Gold Sr Plan	MTS Clinic	3/14/2022						2877 217	166	Encounter	\$0.00	\$0.00	3
MTS Clinic	Grey MD, Merideth		Medicare	Humana Gold Sr Plan	MTS Clinic	3/14/2022	9/15/2017					2877 217	166	Encounter	\$150.00	\$0.00	3
MTS Clinic	Weaver MD, Carrie	Weaver MD, Carrie	Medicare	Humana Gold Sr Plan	MTS Clinic	3/14/2022	12/15/2017					160 217	166	Account	\$155.00	\$0.00	3
MTS Clinic	<No Rendering>	Weaver MD, Carrie	Medicare	Humana Gold Sr Plan	MTS Clinic	3/14/2022						2978 217	166	Encounter	\$0.00	\$0.00	3
MTS Clinic	<No Rendering>	Weaver MD, Carrie	Medicare	Humana Gold Sr Plan	MTS Clinic	3/14/2022						2978 217	166	Encounter	\$0.00	\$0.00	3
MTS Clinic	<No Rendering>	Mcgraw, Phil	Medicare	Medicare	MTS Clinic	5/13/2022						5018 49	46	Encounter	\$0.00	\$0.00	5
MTS Clinic	Grey MD, Merideth	Grey, Merideth	Medicare	Medicare	North Clinic	2/16/2022	1/25/2022					4889 293	249	Encounter	\$75.00	\$0.00	2
MTS Clinic	Yang MD, Christina	Yang, Christina	Medicare	Medicare	Mpls Office	3/21/2022	3/21/2022					4968 304	246	Encounter	\$155.00	\$0.00	3
MTS Clinic	<No Rendering>	Mcgraw, Phil	Medicaid	MN Medicaid	MTS Clinic	5/9/2022						5017 217	166	Encounter	\$0.00	\$0.00	5
MTS Clinic	<No Rendering>	Mcgraw, Phil	Medicaid	MN Medicaid	MTS Clinic	5/9/2022						5017 217	166	Encounter	\$0.00	\$0.00	5
MTS Clinic	Yang MD, Christina	Mcgraw, Phil	Medicaid	MN Medicaid	MTS Clinic	5/9/2022	5/9/2022					5017 217	166	Encounter	\$175.00	\$0.00	5
MTS Clinic	Smith MD, John	Grey, Merideth	Self Pay	Self Pay	MTS Main Optical	1/13/2022	11/5/2013					1438 55	42	Encounter	\$0.27	\$0.00	1
MTS Clinic	Smith MD, John	Grey, Merideth	Self Pay	Self Pay	MTS Main Optical	1/13/2022	11/5/2013					1438 55	42	Encounter	\$9.00	\$0.00	1
MTS Clinic	Jones MD, Tom K	Jones MD, Tom K	Medicare	UCare For Seniors	MTS Clinic	3/22/2023	11/22/2022	Mar-2023	3/1/2023	3/31/2023		5112 369	312	Encounter	\$110.00	\$110.00	1



# Month End Reporting

Collection of reports for monthly closing details.

## 15: Monthly Adjustments



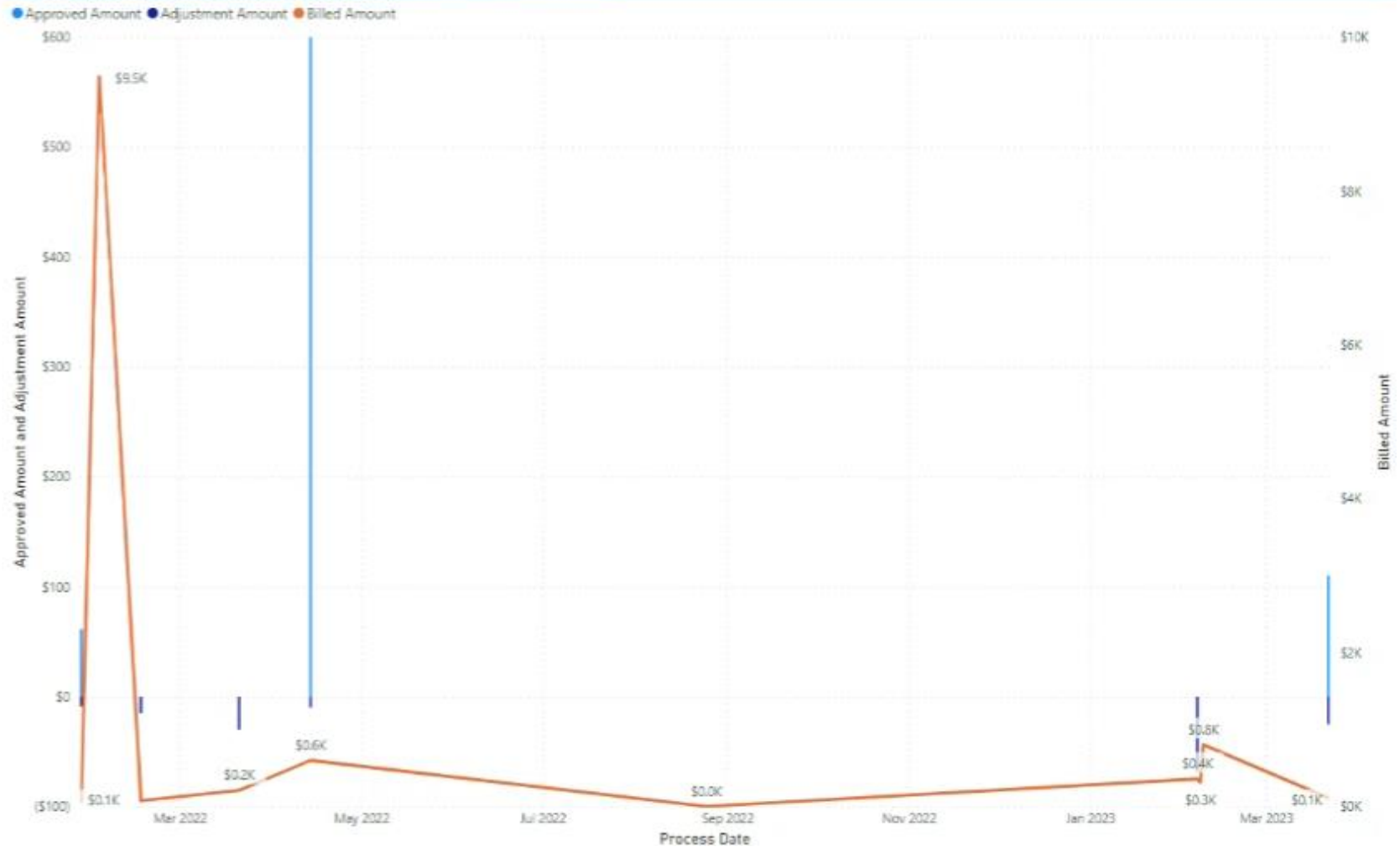
**Practice** All | 
 **Location** All | 
 **Financial Class** All | 
 **Location** All | 
 **Provider** All | 
 **FY Period** All | 
 **Process Date** Last 700 Months (Ca.) 7/1/1965 - 10/31/2023

Financial Class	Total Adjustments
BCBS	(\$5.00)
Commercial	(\$33.00)
Health Partners	(\$18.60)
Medica	\$0.00
Medicare	(\$65.00)
Self Pay	(\$35.00)
Work Comp	\$0.00
<b>Total</b>	<b>(\$156.60)</b>

Payer	Total Adjustments
Aetna	(\$33.00)
Blue Cross Blue Shield	(\$5.00)
Blue Cross Blue Shield	\$0.00
Federal	\$0.00
Health Partners	(\$18.60)
Health Partners Sr Plan	\$0.00
Medica	\$0.00
Medicare	(\$40.00)
Self Pay	(\$35.00)
UCare For Seniors	(\$25.00)
United Healthcare	\$0.00
VSP Vision Plan	\$0.00
<b>Total</b>	<b>(\$156.60)</b>

FY Period	Total Adjustments
Mar-2023	(\$25.00)
Feb-2023	(\$68.00)
Aug-2022	\$0.00
<b>Total</b>	<b>(\$63.60)</b>

Approved Amount, Adjustment Amount and Billed Amount by Process Date



# Month End Reporting

Collection of reports for monthly closing details.

## 16: Monthly Adjustments Raw Data


Practice: All
Location: All
Financial Class: All
Location: All
rendering\_prov: All
FY Period: All
Process Date: Last 700 Months (Calc.)
7/1/1965 - 10/31/2023

Practice	Location	DOS	Process Date	E/V/A/B	Patient Name	Person #	MRN	Billed Amount	Approved Amount	Transaction Date	Transaction Code	Adjustment Amount	Transaction Status	Source	CPT Code	CPT Desc
MTS Clinic	MTS Clinic	3/5/2014	2/7/2023	1501	Test, Ariel S	48	38	\$10.00		2/7/2023	Z Bad Debt Credit	\$1.00	Settled moved to secondary	Patient	J7042	5% DE
MTS Clinic	MTS Clinic	3/5/2014	2/7/2023	1501	Test, Ariel S	48	38	\$10.00		2/7/2023	Z Bad Debt Debit	(\$1.00)	Settled moved to secondary	Patient	J7042	5% DE
MTS Clinic	MTS Clinic	1/30/2023	2/6/2023	5146	Pxptest4, Robert4	404	347	\$33.00		2/6/2023	Write Off Per Management	(\$33.00)	None	Patient	90581	Anthra
MTS Clinic	MTS Clinic	1/27/2022	1/27/2022	4892	Test, Jacob	306	281	\$70.00	\$1.40	1/27/2022	Health Partners Adjustment	(\$8.60)	None	Third party	92014	Compr
MTS Clinic	MTS Clinic	8/30/2017	2/2/2022	2845	Test, Gina	222	171	\$150.00		2/2/2022	Z Bad Debt Credit	(\$150.00)	Settled moved to secondary	Patient	58563	Hysten
MTS Clinic	MTS Clinic	8/30/2017	2/2/2022	2845	Test, Gina	222	171	\$150.00		2/2/2022	Z Bad Debt Debit	\$150.00	Settled moved to secondary	Patient	58563	Hysten
MTS Clinic	MTS Clinic	7/29/2015	2/8/2023	1985	Test, Cheryl	268	206	\$50.00		2/8/2023	Z Bad Debt Credit	\$25.00	Settled moved to secondary	Patient	66020	Injectio
MTS Clinic	MTS Clinic	7/29/2015	2/8/2023	1985	Test, Cheryl	268	206	\$50.00		2/8/2023	Z Bad Debt Debit	(\$25.00)	Settled moved to secondary	Patient	66020	Injectio
MTS Clinic	MTS Clinic	3/5/2014	2/7/2023	1501	Test, Ariel S	48	38	\$0.00		2/7/2023	Z Bad Debt Credit	\$0.00	Settled moved to secondary	Patient	36100	Introdu
MTS Clinic	MTS Clinic	3/5/2014	2/7/2023	1501	Test, Ariel S	48	38	\$0.00		2/7/2023	Z Bad Debt Debit	\$0.00	Settled moved to secondary	Patient	36100	Introdu
MTS Clinic	MTS Clinic	8/30/2017	2/2/2022	2845	Test, Gina	222	171	\$200.00		2/2/2022	Z Bad Debt Credit	(\$200.00)	Settled moved to secondary	Patient	58670	Laparo
MTS Clinic	MTS Clinic	8/30/2017	2/2/2022	2845	Test, Gina	222	171	\$200.00		2/2/2022	Z Bad Debt Debit	\$200.00	Settled moved to secondary	Patient	58670	Laparo
MTS Clinic	MTS Clinic	3/5/2014	2/7/2023	1501	Test, Ariel S	48	38	\$5.00		2/7/2023	Z Bad Debt Credit	\$5.00	Settled moved to secondary	Patient	LF	Late Fe
MTS Clinic	MTS Clinic	3/5/2014	2/7/2023	1501	Test, Ariel S	48	38	\$5.00		2/7/2023	Z Bad Debt Debit	(\$5.00)	Settled moved to secondary	Patient	LF	Late Fe
MTS Clinic	MTS Clinic	8/2/2017	2/8/2023	1985	Test, Cheryl	268	206	\$0.84		2/8/2023	Z Bad Debt Credit	\$0.84	Settled moved to secondary	Patient	LF	Late Fe
MTS Clinic	MTS Clinic	8/2/2017	2/8/2023	1985	Test, Cheryl	268	206	\$0.84		2/8/2023	Z Bad Debt Debit	(\$0.84)	Settled moved to secondary	Patient	LF	Late Fe
MTS Clinic	MTS Clinic	10/3/2017	2/8/2023	1985	Test, Cheryl	268	206	\$0.32		2/8/2023	Z Bad Debt Credit	\$0.32	Settled moved to secondary	Patient	LF	Late Fe
MTS Clinic	MTS Clinic	10/3/2017	2/8/2023	1985	Test, Cheryl	268	206	\$0.32		2/8/2023	Z Bad Debt Debit	(\$0.32)	Settled moved to secondary	Patient	LF	Late Fe
MTS Clinic	MTS Clinic	10/3/2017	2/8/2023	1985	Test, Cheryl	268	206	\$0.84		2/8/2023	Z Bad Debt Credit	\$0.84	Settled moved to secondary	Patient	LF	Late Fe
MTS Clinic	MTS Clinic	10/3/2017	2/8/2023	1985	Test, Cheryl	268	206	\$0.84		2/8/2023	Z Bad Debt Debit	(\$0.84)	Settled moved to secondary	Patient	LF	Late Fe
MTS Clinic	MTS Clinic	10/4/2017	2/8/2023	1985	Test, Cheryl	268	206	\$0.32		2/8/2023	Z Bad Debt Credit	\$0.32	Settled moved to secondary	Patient	LF	Late Fe
MTS Clinic	MTS Clinic	10/4/2017	2/8/2023	1985	Test, Cheryl	268	206	\$0.32		2/8/2023	Z Bad Debt Debit	(\$0.32)	Settled moved to secondary	Patient	LF	Late Fe
MTS Clinic	MTS Clinic	12/11/2018	2/2/2022	3203	Test, Ava	39	29	\$1,850.00		2/2/2022	Z Bad Debt Credit	(\$1,850.00)	Settled moved to secondary	Patient	J7298	Levonc
MTS Clinic	MTS Clinic	12/11/2018	2/2/2022	3203	Test, Ava	39	29	\$1,850.00		2/2/2022	Z Bad Debt Debit	\$1,850.00	Settled moved to secondary	Patient	J7298	Levonc
MTS Clinic	Mpls Office	3/21/2022	3/21/2022	4968	Test, Karen	304	246	\$155.00	\$0.00	3/21/2022	Medicare Adjustment	(\$25.00)	Settled moved to self	Third party	99214	Office/
MTS Clinic	MTS Clinic	1/8/2019	2/2/2022	3215	Test, Drew	217	166	\$155.00		2/2/2022	Z Bad Debt Credit	(\$105.00)	Settled moved to secondary	Patient	99214	Office/
MTS Clinic	MTS Clinic	1/8/2019	2/2/2022	3215	Test, Drew	217	166	\$155.00		2/2/2022	Z Bad Debt Debit	\$105.00	Settled moved to secondary	Patient	99214	Office/
MTS Clinic	St Paul Office	9/14/2016	2/2/2022	2441	Test, Ava	39	29	\$155.00		2/2/2022	Z Bad Debt Credit	(\$80.00)	Settled moved to secondary	Patient	99214	Office/
MTS Clinic	St Paul Office	9/14/2016	2/2/2022	2441	Test, Ava	39	29	\$155.00		2/2/2022	Z Bad Debt Debit	\$80.00	Settled moved to secondary	Patient	99214	Office/
MTS Clinic	MTS Clinic	7/12/2016	8/25/2022	7	Target			(\$150.00)	\$0.00	8/25/2022	Z Void Charge	\$150.00		Patient	99213	Office/
MTS Clinic	MTS Clinic	7/12/2016	8/25/2022	7	Target			\$150.00	\$0.00	8/25/2022	Z Void Charge	(\$150.00)		Patient	99213	Office/
MTS Clinic	MTS Clinic	5/1/2017	2/8/2023	2750	Medicare, Anthony C	159	91	\$175.00		2/8/2020	Z Bad Debt Credit	\$25.00	Settled moved to secondary	Patient	99213	Office/
MTS Clinic	MTS Clinic	5/1/2017	2/8/2023	2750	Medicare, Anthony C	159	91	\$175.00		2/8/2020	Z Bad Debt Debit	(\$25.00)	Settled moved to secondary	Patient	99213	Office/

<b>54</b> # Adjustments	<b>1/27/2022</b> Oldest Batch Date	<b>4</b> # Reason Codes	<b>47</b> # Write Offs / Bad Debt	<b>\$12.02K</b> Total Billed Amount	<b>\$771.40</b> Total Approved Amount	<b>(\$156.60)</b> Total Adjustment Amount
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# Month End Reporting

Collection of reports for monthly closing details.

## 17: Monthly Refunds



Practice: [Dropdown] Location: All [Dropdown] Financial Class: All [Dropdown] Payer: All [Dropdown] Provider: All [Dropdown] FY Period: All [Dropdown] Process Date: 10/25/2021 [Calendar] 8/23/2023 [Calendar]

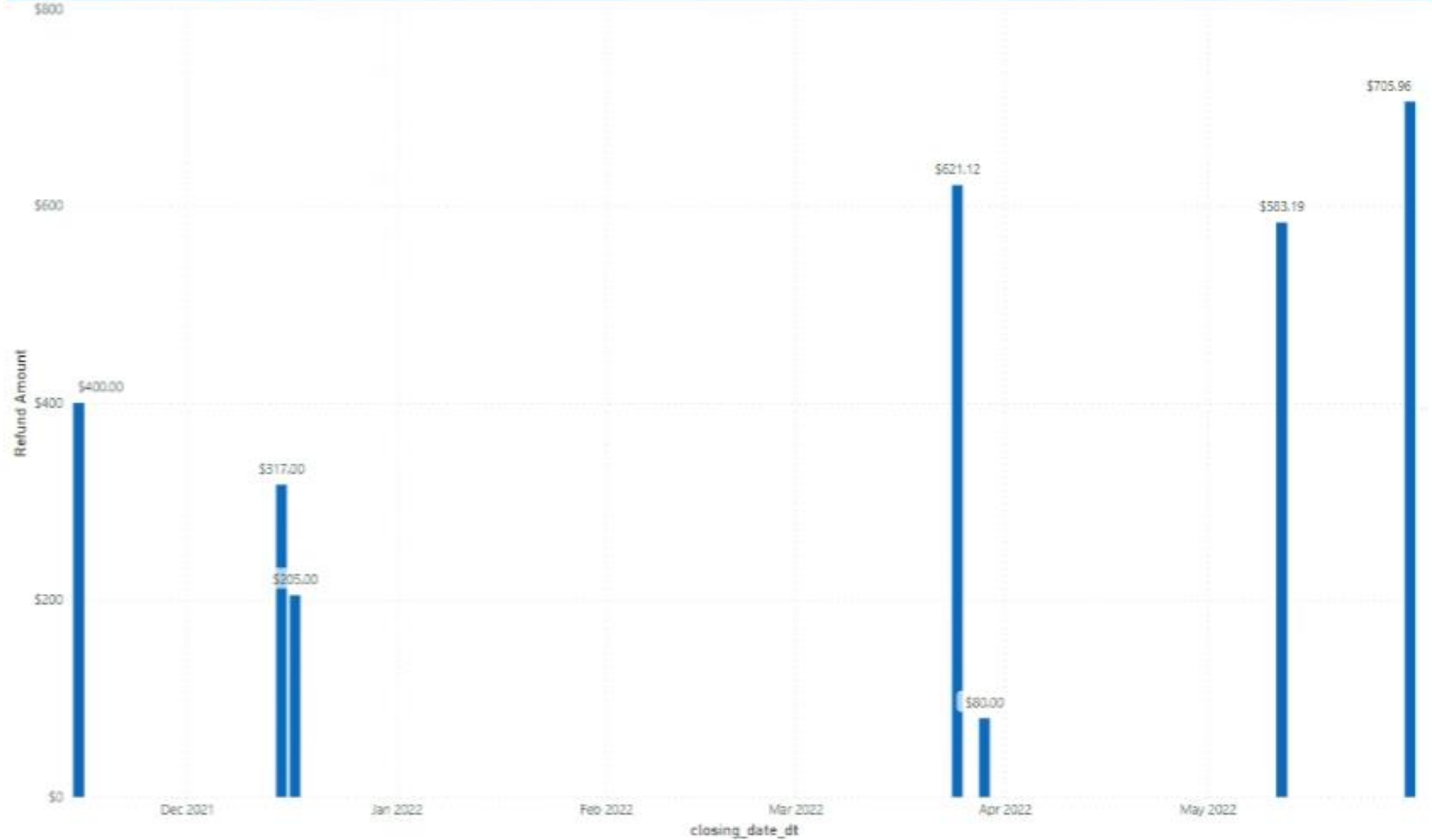
Financial Class	Total Refunds
Aetna	\$150.00
Blue Cross	\$1,119.31
CHIPS	\$480.00
Cigna	\$230.00
Medicaid (TX)	\$932.96
<b>Total</b>	<b>\$2,912.27</b>

Payer	Total Refunds
Aetna	\$150.00
Amerigroup Star Medicaid	\$57.24
BLUE CROSS HMO	\$694.31
BLUE CROSS PPO	\$425.00
Cigna	\$230.00
EPSDT	\$125.00
FirstCare Chip Program	\$480.00
Firstcare Star Medicaid	\$639.18
<b>Total</b>	<b>\$2,912.27</b>

Provider	Total Refunds
	\$25.00
	\$356.26
	\$245.34
	\$960.00
	\$698.12
	\$150.00
	\$80.00
<b>Total</b>	<b>\$397.55</b>

FY Period	Total Refunds
	\$2,912.27
<b>Total</b>	<b>\$2,912.27</b>

Refund Amount by closing\_date\_dt







# Month End Reporting

Collection of reports for monthly closing details.

## 19: Radiology Charges



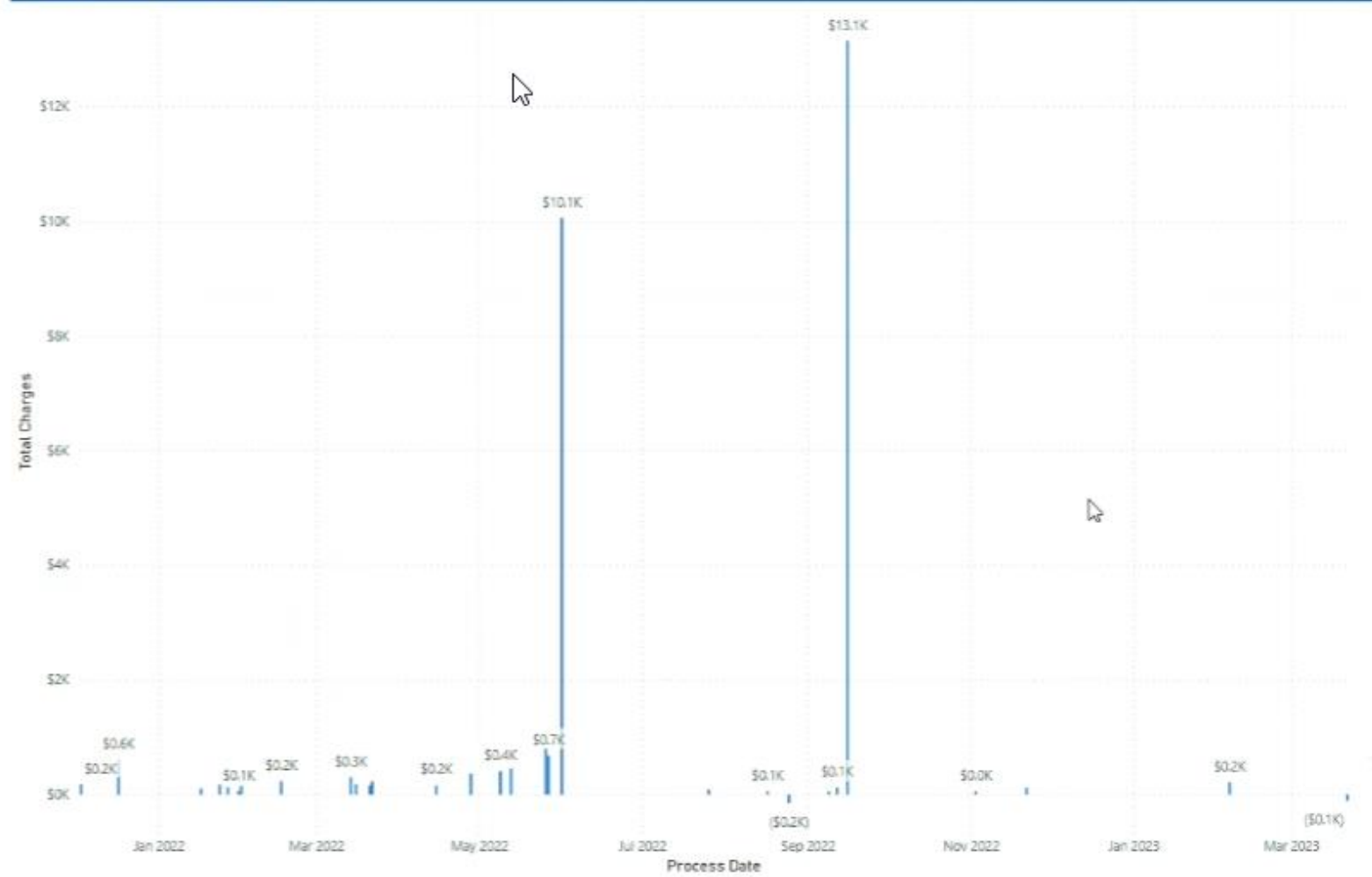
**Practice**: All | 
 **Location**: All | 
 **Financial Class**: All | 
 **Payer**: All | 
 **Provider**: All | 
 **FY Period**: All | 
 **Process Date**: Last 30 Months (Ca...) | 
 5/1/2022

Location	Total Charges
MTS Clinic	\$27,113.04
Mpls Office	\$1,110
North Clinic	\$297
South Clinic	\$175
Elk River Office	\$155
*Elk River Office	\$55
<b>Total</b>	<b>\$28,905.04</b>

Financial Class	Total Charges
BCBS	\$1,075
Commercial	\$683
Health Partners	\$1,325
Medica	\$497
Medicaid	\$406
Medicare	\$13,850
Self Pay	\$10,176.54
Work Comp	\$892.5
<b>Total</b>	<b>\$28,905.04</b>

Provider	Total Charges
Grey MD, Mendeth	\$10,681.54
Yang MD, Christina	\$8,761.5
Weaver MD, Carrie	\$6,950
Mcgraw PhD, Phil	\$1,620
Cruise MD, Todd	\$675
Jones MD, Tom K	\$317
White PA, Heather	\$50
	(\$150)
<b>Total</b>	<b>\$28,905.04</b>

Total Charges by Process Date





# Month End Reporting

Collection of reports for monthly closing details.

## 20: Radiology Charges Raw Data



Practice: All | Location: All | Financial Class: All | Payer: All | Provider: All | FY Period: All | Process Date: Last 30 Months (Ca.) | 5/1/2021 - 10/31/2023

E/I	Sequence #	Process Date	DOS	FY Period	FY Start Date	FY End Date	Charge Amount	Count	CPT Code	CPT Description	Modifier 1	Modifier 2	Modifier 3	Modifier 4	Location	Rendering	Referring
3266	3	1/17/2022	11/10/2015				\$100	1.00	Q0508	Mis sup/acc imp vad					MTS Clinic	Grey MD, Merideth	
7	3	8/25/2022	7/12/2016	Aug-2022	8/1/2022	8/31/2022	(\$150)	-1.00	99213	Office/outpatient visit, est, exp prob	LR				MTS Clinic		
2877	1	3/14/2022	9/15/2017				\$150	1.00	99213	Office/outpatient visit, est, exp prob	LR				MTS Clinic	Grey MD, Merideth	
3834	1	3/14/2022	6/23/2021				\$150	1.00	99213	Office/outpatient visit, est, exp prob					MTS Clinic	Grey MD, Merideth	
3870	1	1/24/2022	7/21/2021				\$175	1.00	99213	Office/outpatient visit, est, exp prob	LR				MTS Clinic	Yang MD, Christina	
4845	1	2/1/2022	10/12/2021				\$95	1.00	99211	Office/outpatient visit, est, minimal					Mpls Office	Jones MD, Tom K	
4868	1	12/3/2021	12/3/2021				\$175	1.00	99213	Office/outpatient visit, est, exp prob	LR				North Clinic	Yang MD, Christina	Yang, Chri
4871	1	12/17/2021	12/17/2021				\$600	1.00	66984	Remove cataract, insert lens, extracapsular					MTS Clinic	Yang MD, Christina	Yang, Chri
4886	1	1/31/2022	1/25/2022				\$55	1.00	99201	Office/outpatient visit, new, problem focused					*Elk River Office	Grey MD, Mendeth	
4889	1	2/16/2022	1/25/2022				\$75	1.00	99211	Office/outpatient visit, est, minimal					North Clinic	Grey MD, Merideth	Grey, Meri
4892	1	1/27/2022	1/27/2022				\$70	1.00	92014	Comprehensive eye exam, established patient					MTS Clinic	Yang MD, Christina	Yang, Chri
4892	2	1/27/2022	1/27/2022				\$50	1.00	L1270	ABDOMINAL PAD					MTS Clinic	Grey MD, Merideth	Yang, Chri
4892	3	5/27/2022	1/27/2022				\$75	1.00	J3100	TENECTEPLASE INJECTION					MTS Clinic	Yang MD, Christina	Yang, Chri
4892	4	5/27/2022	1/27/2022				\$100	1.00	J3470	HYALURONIDASE INJECTION					MTS Clinic	Yang MD, Christina	Yang, Chri
4894	1	2/1/2022	2/1/2022				\$50	1.00	99211TS	Office Visit					MTS Clinic	Yang MD, Christina	Yang, Chri
4921	1	2/16/2022	2/16/2022				\$155	1.00	99214	Office/outpatient visit, est, detailed					MTS Clinic	Yang MD, Christina	Yang, Chri
4942	1	3/16/2022	2/28/2022				\$175	1.00	99213	Office/outpatient visit, est, exp prob	LR				MTS Clinic	Cruise MD, Todd	
4968	1	3/21/2022	3/21/2022				\$155	1.00	99214	Office/outpatient visit, est, detailed	LL				Mpls Office	Yang MD, Christina	Yang, Chri
4970	1	3/22/2022	3/22/2022				\$75	1.00	0005T	Cerebrovasc artery stent, percu, initial					MTS Clinic	Weaver MD, Carrie	Weaver M
4970	2	3/22/2022	3/22/2022				\$75	1.00	0021T	Insert transcerv/vaginal fetal oximtry sensor					MTS Clinic	Weaver MD, Carrie	Weaver M
4970	3	3/22/2022	3/22/2022				\$75	1.00	74328	X-ray for bile duct endoscopy, S&I					MTS Clinic	Weaver MD, Carrie	Weaver M
4977	1	4/15/2022	4/15/2022				\$155	1.00	99214	Office/outpatient visit, est, detailed					Elk River Office	Weaver MD, Carrie	Weaver M
4996	1	4/28/2022	4/28/2022				\$175	1.00	99213	Office/outpatient visit, est, exp prob	LR				MTS Clinic	Mcgraw PhD, Phil	Mcgraw, P
4996	2	4/28/2022	4/28/2022				\$100	1.00	G8947	1 or more neuropsych					MTS Clinic	Mcgraw PhD, Phil	Mcgraw, P
4996	3	4/28/2022	4/28/2022				\$85	1.00	80048	Meabolic panel, basic					MTS Clinic	Mcgraw PhD, Phil	Mcgraw, P
5017	1	5/9/2022	5/9/2022				\$175	1.00	99213	Office/outpatient visit, est, exp prob	LR				MTS Clinic	Yang MD, Christina	Mcgraw, P
5017	2	5/9/2022	5/9/2022				\$31	1.00	80061	Lipid panel					MTS Clinic	Yang MD, Christina	Mcgraw, P
5017	3	5/9/2022	5/9/2022				\$200	1.00	70010	Contrast x-ray of brain, R&I					MTS Clinic	Yang MD, Christina	Mcgraw, P
5018	1	5/13/2022	5/13/2022				\$400	2.00	99213	Office/outpatient visit, est, exp prob	TC				MTS Clinic	Mcgraw PhD, Phil	Mcgraw, P
5018	2	5/13/2022	5/13/2022				\$50	1.00	55110	Exploration of scrotum					MTS Clinic	Mcgraw PhD, Phil	Mcgraw, P
5037	1	5/26/2022	5/26/2022				\$450	15.00	J0120	TETRACYCLIN INJECTION					Mpls Office	Mcgraw PhD, Phil	Mcgraw, P
5037	2	5/26/2022	5/26/2022				\$360	30.00	J0151	ADENOSINE INJECTION					Mpls Office	Mcgraw PhD, Phil	Mcgraw, P
5039	1	5/27/2022	5/27/2022				\$500	1.00	92134	CPTR OPHTH DX IMG POST SEGMENT					MTS Clinic	Cruise MD, Todd	
5043	1	6/1/2022	6/1/2022				\$175	1.00	99215	Office/outpatient visit, est, high complex					MTS Clinic	Grey MD, Merideth	
5043	2	6/1/2022	6/1/2022				\$9,876.54	1.00	92250	Fundus photography					MTS Clinic	Grey MD, Merideth	
5071	1	7/26/2022	7/26/2022	Jul-2022	7/1/2022	7/31/2022	\$82.5	1.00	99202	Office/outpatient visit, new, expanded prob					MTS Clinic	Yang MD, Christina	Yang, Chri
5081	1	8/17/2022	8/17/2022	Aug-2022	8/1/2022	8/31/2022	\$50	1.00	G0438	Ppps, initial visit					MTS Clinic	Grey MD, Mendeth	Grey, Meri
<b>Total</b>							<b>\$28,905.04</b>										



# Month End Reporting

Collection of reports for monthly closing details.

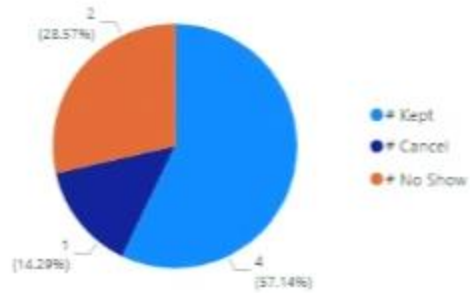
## 21: Appointment Analysis



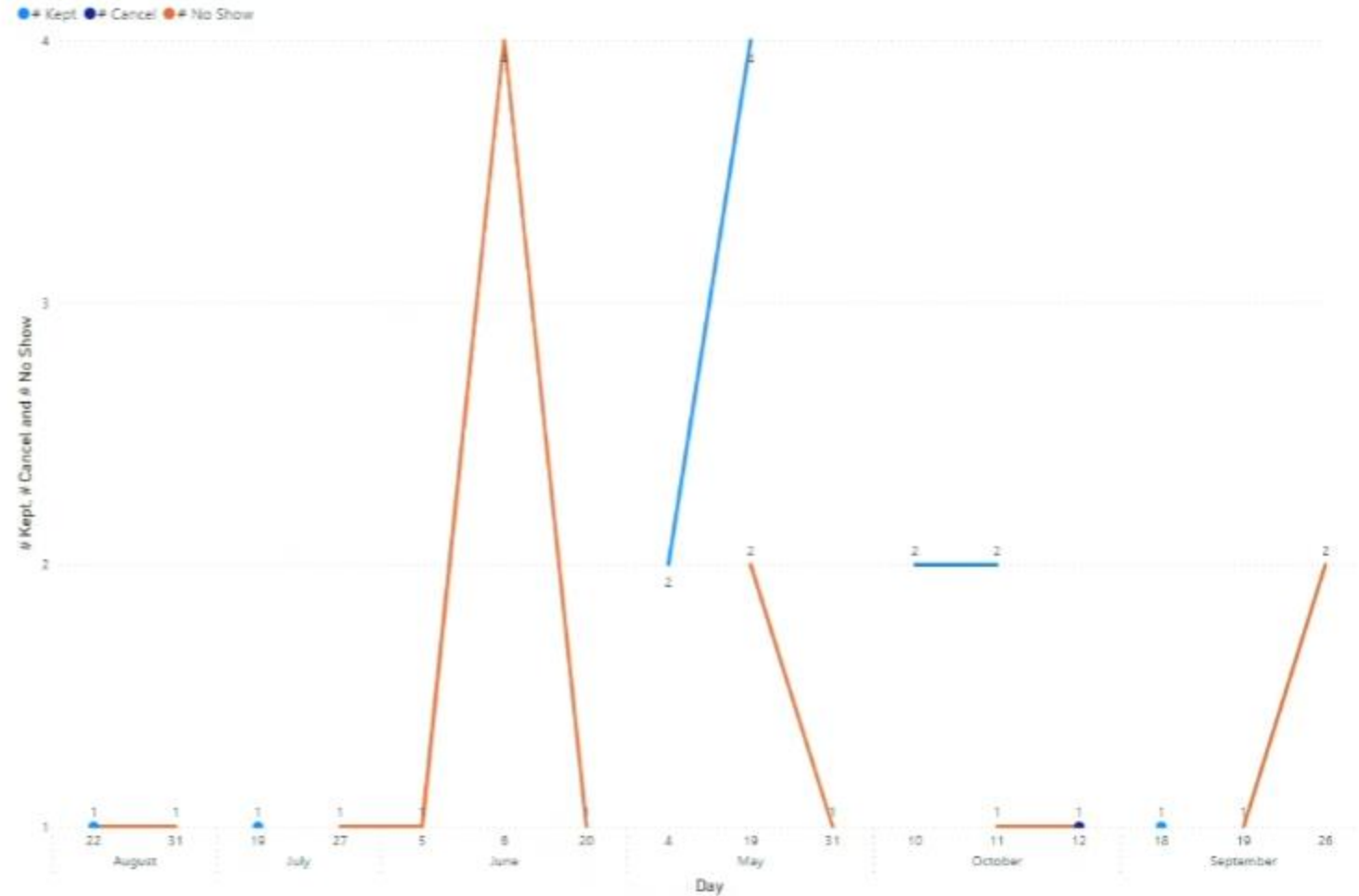
Practice: All | Location: All | provider\_name: All | Resource: All | Date: Last: 24 | Months (Calen...: 11/1/2021 - 10/31/2023

Period	# Kept	# Cancel	# No Show	# Booked	# Open
Jul-2023	1		1	2	
Aug-2023	1		2	3	25
Oct-2023	4	1	2	7	9
May-2023	6		3	12	52
Sep-2023	1		3	4	30
Jun-2023			6	9	54
<b>Total</b>	<b>13</b>	<b>1</b>	<b>17</b>	<b>37</b>	<b>170</b>

Oct-2023



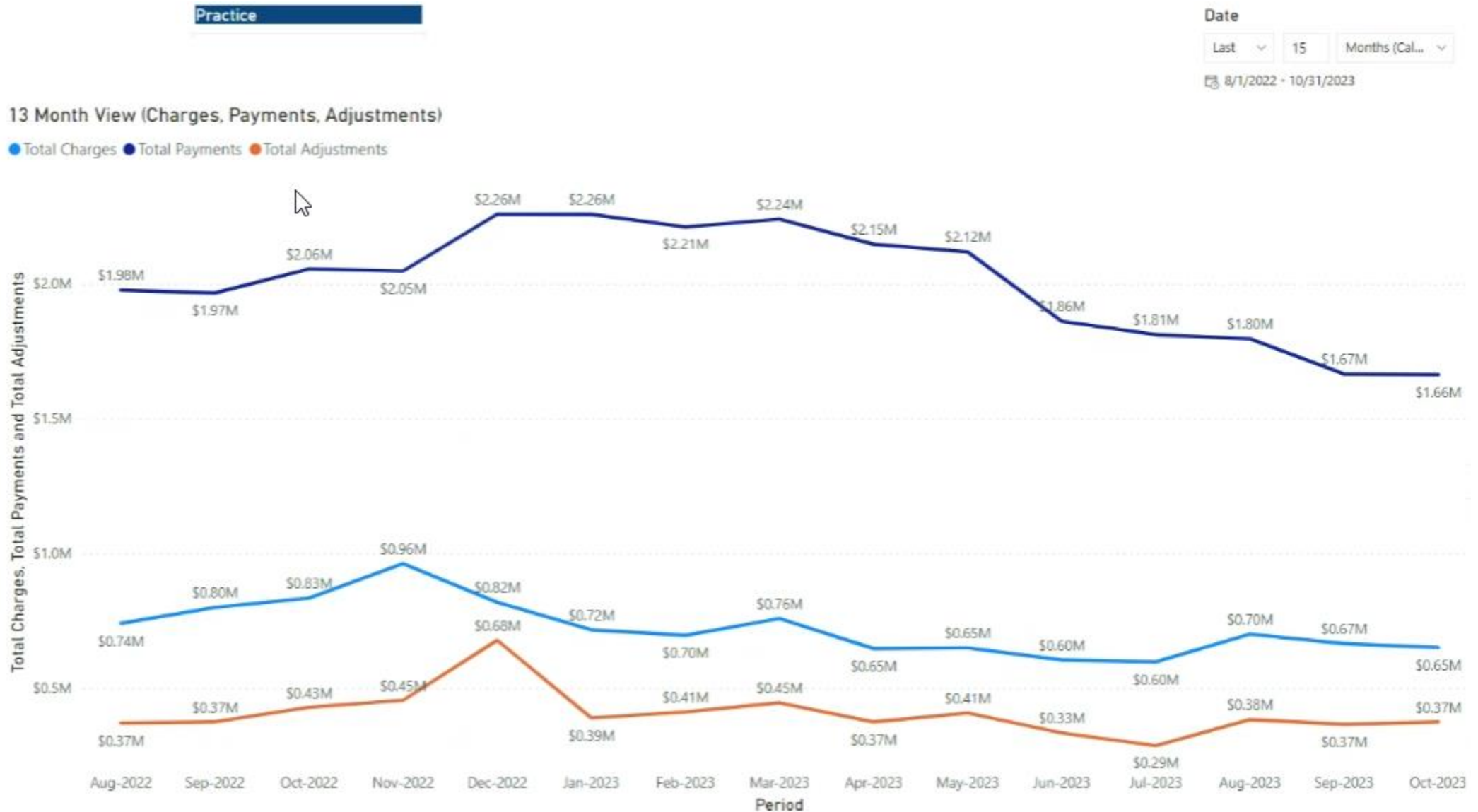
# Kept, # Cancel and # No Show by Month\_Name and Day



# Month End Reporting

Trending line of charges, payments and adjustments for 13 months.

22: 13 Month View of Charges, Payments and Adjustments



# Month End Reporting

Collection of reports for monthly closing details.

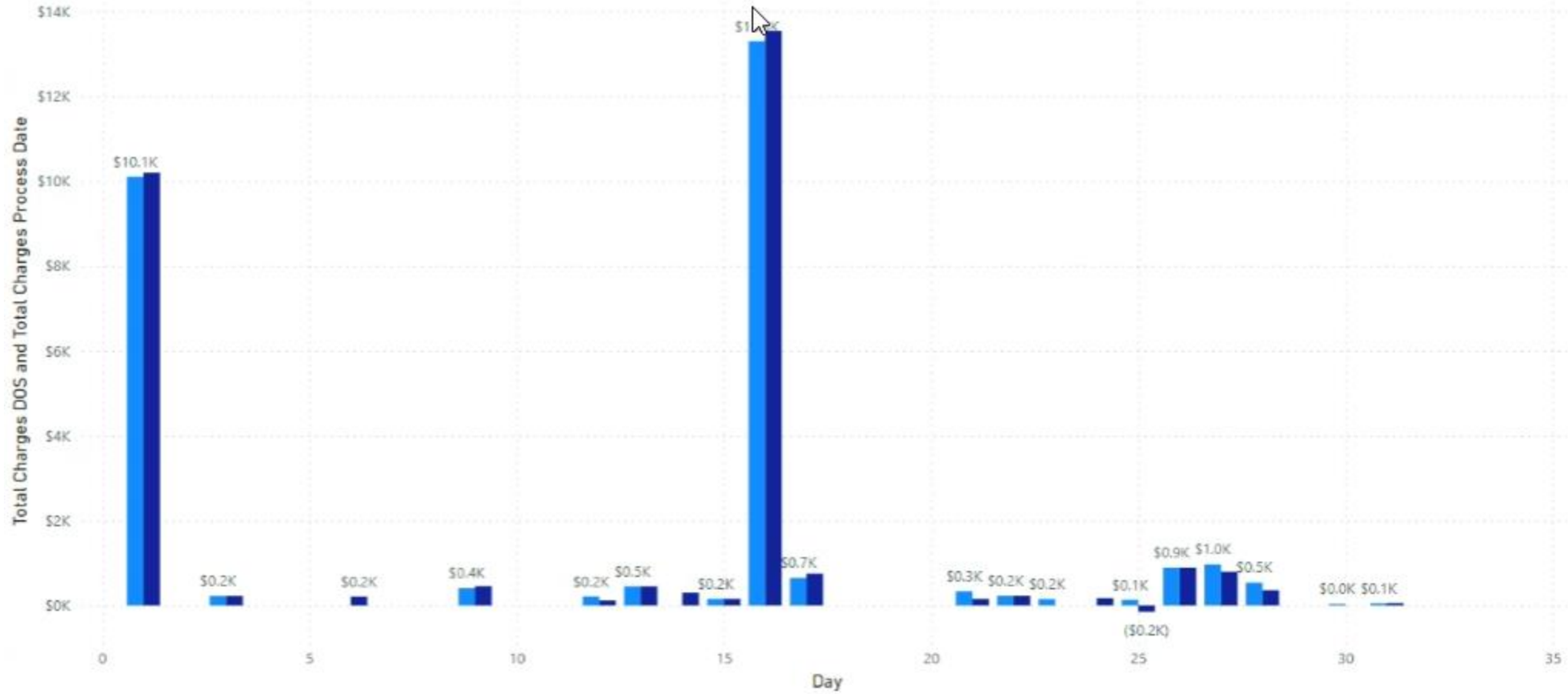
## 23: Charges By Date



Practice: All | Provider: All | Financial Class: All | Location: All | Process Date: Last 30 Months (5/1/2021 - 10/31/2023)

### Charges By Day

Total Charges DOS (light blue) Total Charges Process Date (dark blue)





# Month End Reporting

Collection of reports for monthly closing details.

## 24: Charges and Payments by Financial Class

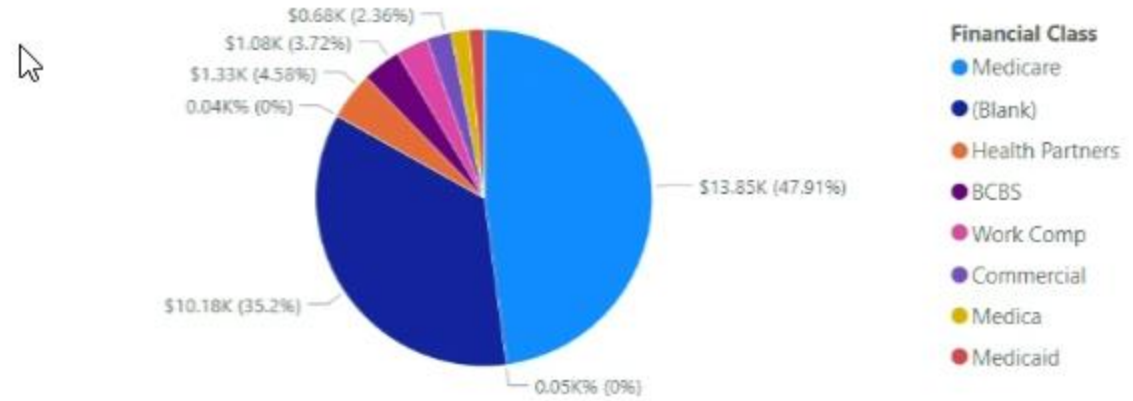


**Practice**: All  
**Provider**: All  
**Financial Class**: All  
**Location**: All  
**Process Date**: Last 30 Months (5/1/2021 - 10/31/2023)

### Charges By Financial Class

Financial Class	Total Charges	% of Charges	% of Charges Last 13 Months
BCBS	\$1,075	3.72%	68.63%
Commercial	\$683	2.36%	12.94%
Health Partners	\$1,325	4.58%	
Medica	\$497	1.72%	18.43%
Medicaid	\$406	1.40%	
Medicare	\$13,850	47.92%	0.00%
Work Comp	\$892.5	3.09%	
<b>Total</b>	<b>\$28,905.04</b>	<b>100.00%</b>	<b>100.00%</b>

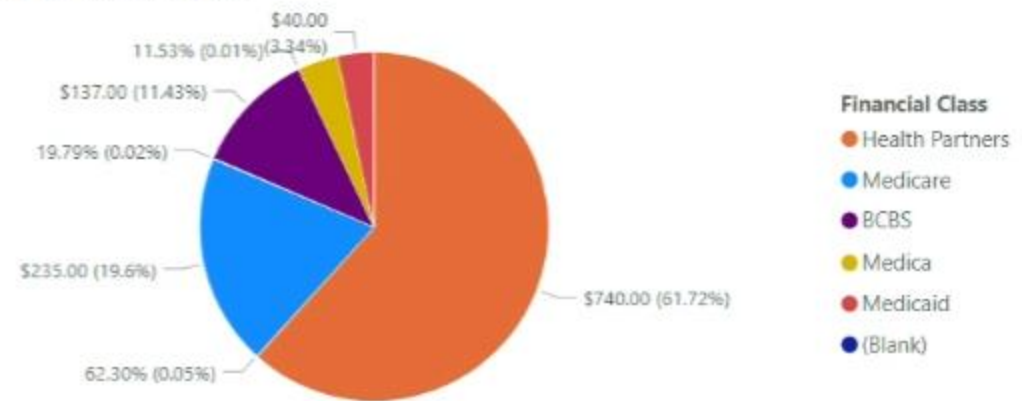
### Charges by Financial Class



### Payments By Financial Class

Financial Class	Total Payments	% of Payments	% of Payments 13 Months Ago
BCBS	\$137.00	11.53%	
Health Partners	\$740.00	62.30%	
Medica	\$45.00	3.79%	
Medicaid	\$40.00	3.37%	
Medicare	\$235.00	19.79%	100.00%
<b>Total</b>	<b>\$1,187.73</b>	<b>100.00%</b>	<b>100.00%</b>

### Payments by Financial Class





# Month End Reporting

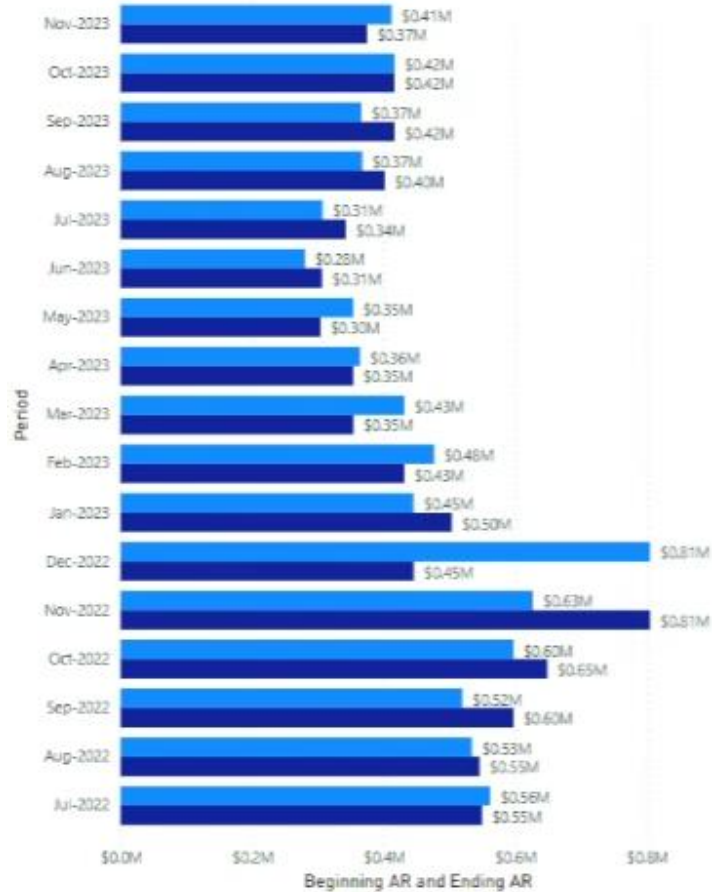
AR timeline.

25: AR Analysis Last 13 Months



## Beginning AR and Ending AR by Period

● Beginning AR ● Ending AR



## AR Analysis

Period	Beginning AR	Ending AR	Days In AR	Monthly Charge Amount	Monthly Payment Amount	Monthly Adjustment Amount	Monthly Refund Amount
Nov-2023	\$411,898.38	\$374,747.77	119.78	\$41,706.58	(\$30,411.80)	(\$48,445.39)	\$0.00
Oct-2023	\$416,392.27	\$416,237.12	110.47	\$626,665.64	(\$267,015.64)	(\$360,465.53)	\$660.38
Sep-2023	\$366,364.83	\$416,392.27	108.97	\$665,210.51	(\$249,753.51)	(\$365,429.56)	\$0.00
Aug-2023	\$367,446.56	\$401,309.77	106.42	\$671,518.53	(\$292,699.92)	(\$344,955.40)	\$0.00
Jul-2023	\$307,052.68	\$342,456.28	89.64	\$560,720.55	(\$242,954.96)	(\$282,361.99)	\$0.00
Jun-2023	\$280,033.09	\$306,098.22	77.30	\$604,426.56	(\$244,095.60)	(\$334,265.83)	\$0.00
May-2023	\$353,466.17	\$303,569.72	78.21	\$625,498.89	(\$293,678.47)	(\$381,716.87)	\$0.00
Apr-2023	\$364,041.75	\$353,466.17	88.56	\$646,938.88	(\$283,208.31)	(\$374,306.15)	\$0.00
Mar-2023	\$431,704.19	\$353,717.12	83.60	\$733,591.25	(\$374,045.14)	(\$437,533.18)	\$0.00
Feb-2023	\$476,522.04	\$431,704.19	101.74	\$695,873.96	(\$339,080.88)	(\$401,610.93)	\$0.00
Jan-2023	\$445,490.64	\$503,607.18	-2,174.61	\$676,000.30	(\$274,617.33)	(\$343,266.43)	\$0.00
Dec-2022	\$805,196.37	\$445,750.90	103.44	\$816,209.95	(\$498,456.97)	(\$677,198.45)	\$0.00
Nov-2022	\$627,177.21	\$805,196.37	199.27	\$961,819.04	(\$343,983.90)	(\$439,815.98)	\$0.00
Oct-2022	\$597,000.47	\$648,725.23	172.07	\$797,633.55	(\$345,490.26)	(\$400,418.53)	\$0.00
Sep-2022	\$519,705.43	\$597,000.47	169.57	\$799,617.87	(\$352,172.89)	(\$370,149.94)	\$0.00
Aug-2022	\$533,999.53	\$545,853.79	163.30	\$717,351.94	(\$361,709.18)	(\$343,788.50)	\$0.00
Jul-2022	\$562,193.84	\$549,318.99	173.23	\$574,425.64	(\$286,821.84)	(\$300,478.65)	\$0.00
<b>Total</b>	<b>\$7,865,685.45</b>	<b>\$7,795,151.56</b>	<b>-229.03</b>	<b>\$11,215,209.64</b>	<b>(\$5,080,196.60)</b>	<b>(\$6,206,207.31)</b>	<b>\$660.38</b>

## Profit Overview 6 Month Totals

Period	Charges	Payments	Adjustments	Gross Collection %
Oct-2023	\$650,486.72	\$280,094.80	\$374,493.73	43.06%
Sep-2023	\$665,210.51	\$252,014.91	\$365,905.61	37.88%
Aug-2023	\$700,329.72	\$320,774.07	\$383,497.85	45.80%
Jul-2023	\$597,610.26	\$250,304.81	\$286,653.59	41.88%
Jun-2023	\$604,426.56	\$243,345.36	\$333,858.03	40.26%
May-2023	\$649,487.73	\$316,961.13	\$407,944.03	48.80%
<b>Total</b>	<b>\$3,867,551.5</b>	<b>\$1,663,495.08</b>	<b>\$2,152,352.84</b>	<b>43.01%</b>

## Profit Overview 6 Month Averages

Period	Charges	Payments	Adjustments
Oct-2023	\$108,414.45	\$46,682.47	\$62,415.62
Sep-2023	\$110,868.42	\$42,002.49	\$60,984.27
Aug-2023	\$116,721.62	\$53,462.35	\$63,916.31
Jul-2023	\$99,601.71	\$41,717.47	\$47,775.60
Jun-2023	\$100,737.76	\$40,557.56	\$55,643.00
May-2023	\$108,247.96	\$52,826.86	\$67,990.67
<b>Total</b>	<b>\$644,591.92</b>	<b>\$277,249.18</b>	<b>\$358,725.47</b>

## Last Year Totals (Selected Value)

Period	Charges	Payments	Adjustments	Gross Collection %
Oct-2022	\$4,876,324.21	\$2,341,555.21	\$2,629,505.35	48.02%



Confidential and Proprietary

# Month End Reporting

## 26: Receivable Analysis



Navigation

Practice  
NextGen Medical Practice

Location  
All

Provider  
All

Financial Class  
All

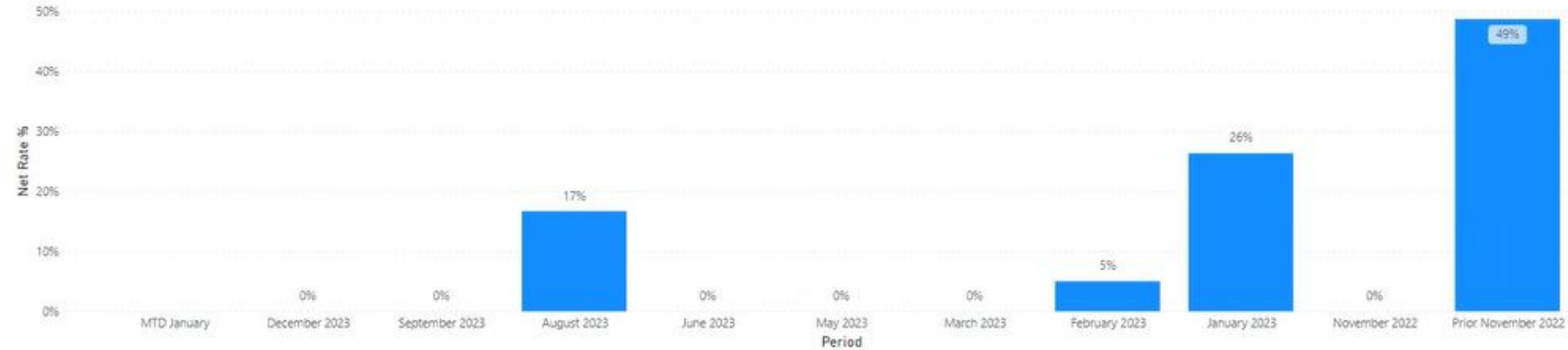
### Receivable Analysis

Section	Total Charges	Total Adjustments	Charges - Adjustments	Total Payments	Total Refunds	Payments - Refunds	Gross Rate	Net Rate
<b>Accounts Receivable</b>	<b>\$1,070,013.21</b>	<b>\$4,799.10</b>	<b>\$1,065,214.11</b>	<b>\$517,124.74</b>	<b>\$315.00</b>	<b>\$516,809.74</b>	<b>48%</b>	<b>49%</b>
MTD January	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	NaN	NaN
December 2023	\$50.00	\$0.00	\$50.00	\$0.00	\$0.00	\$0.00	0%	0%
September 2023	\$225.00	\$0.00	\$225.00	\$0.00	\$0.00	\$0.00	0%	0%
August 2023	\$300.00	\$0.00	\$300.00	\$50.00	\$0.00	\$50.00	17%	17%
June 2023	\$420.01	\$0.00	\$420.01	\$0.00	\$0.00	\$0.00	0%	0%
May 2023	\$1,500.00	\$0.00	\$1,500.00	\$0.00	\$0.00	\$0.00	0%	0%
March 2023	\$125.00	\$0.00	\$125.00	\$0.00	\$0.00	\$0.00	0%	0%
February 2023	\$500.00	\$0.00	\$500.00	\$25.00	\$0.00	\$25.00	5%	5%
January 2023	\$95.00	\$0.00	\$95.00	\$25.00	\$0.00	\$25.00	26%	26%
November 2022	\$95.00	\$0.00	\$95.00	\$0.00	\$0.00	\$0.00	0%	0%
Prior November 2022	\$1,066,703.20	\$4,799.10	\$1,061,904.10	\$517,024.74	\$315.00	\$516,709.74	48%	49%
<b>Total</b>								

### Number of Items

Month	# Charges	# Adjustments	# Payments	# Refunds
December 2023	1			
September 2023	1			
August 2023	2		1	
June 2023	3			
May 2023	4			
March 2023	2			
February 2023	3		3	
January 2023	1		1	
November 2022	1			
Prior November 2022	409	85	196	5
<b>Total</b>	<b>427</b>	<b>85</b>	<b>201</b>	<b>5</b>

### Net Rate % by Period



# Month End Reporting

## 27: Receivable Analysis Raw Data



### Total Payments by Date of Service and Transaction Post Date

Practice  
NextGen Medical Practice

Date of Service  
Last 15 Years (Calendar)  
1/1/2009 - 12/31/2023

Transaction Post Date  
Last 15 Years (Calendar)  
1/1/2009 - 12/31/2023

Navigation

DOS	Transaction Post Date																							
	Jan-2009	Feb-2009	Oct-2015	Mar-2016	Apr-2016	May-2016	Feb-2018	Aug-2018	May-2019	Aug-2019	Feb-2020	Mar-2020	Jun-2020	Jul-2020	Oct-2020	Nov-2020	Dec-2020	Jan-2021	Apr-2021	May-2021	Jul-2021	Oct-2021	Jan-2023	
Jan-2009	(\$244.00)	(\$314.00)												(\$200.00)										
Feb-2009		(\$1,293.00)	\$28.00													(\$500.00)								
Jan-2016						(\$50.00)																		
Mar-2016			(\$20.00)	\$0.00																				
Apr-2016					(\$50.00)																			
May-2016					(\$35.00)																			
Jul-2016																						(\$201.00)		
Aug-2016						(\$20.00)							(\$100.00)											
Aug-2017								(\$95.00)																
Mar-2018											(\$5.00)													
Apr-2018																(\$500.00)		\$0.00						
Aug-2018						(\$170.00)																		
Nov-2018									(\$185.00)															
Apr-2019							\$0.00																	
Jun-2019													(\$28.00)											
Oct-2019																								
Feb-2020										(\$85.00)	(\$20.00)						(\$170.00)						\$0.00	
Mar-2020															(\$20.00)		\$0.00							
Jan-2021												\$0.00												
Mar-2021																					(\$50.00)			
Apr-2021																			(\$169.99)				(\$50.00)	
Jul-2021											(\$25.00)											(\$2.00)		
Jan-2023																								(\$
Feb-2023																								
May-2023																								
Nov-2023												(\$25.00)												
Dec-2023												\$0.00												
	(\$244.00)	(\$1,607.00)	\$8.00	\$0.00	(\$85.00)	(\$240.00)	\$0.00	(\$95.00)	(\$185.00)	(\$85.00)	(\$20.00)	(\$55.00)	(\$128.00)	(\$200.00)	(\$20.00)	(\$1,000.00)	(\$170.00)	\$0.00	(\$169.99)	(\$251.00)	(\$2.00)	(\$50.00)	(\$	



# Month End Reporting

## 28: Payment Lag



### Total Payments by Date of Service and Transaction Post Date

Practice  
NextGen Medical Practice

Date of Service  
Last 15 Years (Calendar)

Transaction Post Date  
Last 15 Years (Calendar)

1/1/2009 - 12/31/2023

1/1/2009 - 12/31/2023

Navigation

DOS	Transaction Post Date																							
	Jan-2009	Feb-2009	Oct-2015	Mar-2016	Apr-2016	May-2016	Feb-2018	Aug-2018	May-2019	Aug-2019	Feb-2020	Mar-2020	Jun-2020	Jul-2020	Oct-2020	Nov-2020	Dec-2020	Jan-2021	Apr-2021	May-2021	Jul-2021	Oct-2021	Ja	
Jan-2009	(\$244.00)	(\$314.00)												(\$200.00)										
Feb-2009		(\$1,293.00)	\$28.00													(\$500.00)								
Jan-2016						(\$50.00)																		
Mar-2016			(\$20.00)	\$0.00																				
Apr-2016					(\$50.00)																			
May-2016					(\$35.00)																			
Jul-2016																								
Aug-2016						(\$20.00)							(\$100.00)											
Aug-2017								(\$95.00)																
Mar-2018											(\$5.00)													
Apr-2018																(\$500.00)		\$0.00						
Aug-2018						(\$170.00)																		
Nov-2018									(\$185.00)															
Apr-2019							\$0.00																	
Jun-2019													(\$28.00)											
Oct-2019											(\$85.00)													
Feb-2020										(\$20.00)							(\$170.00)						\$0.00	
Mar-2020															(\$20.00)		\$0.00							
Jan-2021												\$0.00												
Mar-2021																								
Apr-2021																								
Jul-2021																								
Jan-2023																								
Feb-2023																								
May-2023																								
Nov-2023												(\$25.00)												
Dec-2023												\$0.00												
	(\$244.00)	(\$1,607.00)	\$8.00	\$0.00	(\$85.00)	(\$240.00)	\$0.00	(\$95.00)	(\$185.00)	(\$85.00)	(\$20.00)	(\$55.00)	(\$128.00)	(\$200.00)	(\$20.00)	(\$1,000.00)	(\$170.00)	\$0.00	(\$169.99)	(\$251.00)	(\$2.00)	(\$50.00)	(\$	



# Month End Reporting

## 29: Navigation



### Month End Navigation *(Click A Button Listed to Navigate)*

**Navigation**

- Navigation
- Profit Overview (Dashboard)
- AR Analysis (Insurance Totals)
- AR Analysis (Self Pay Totals)
- AR Analysis Bad Debt (Totals)
- Monthly Changes AR (Totals)
- Monthly Charges (Totals)
- Monthly Payments (Totals)
- Monthly Adjustments (Totals)
- Monthly Refunds (Totals)
- Appointment Analysis
- 13 Month View (Charges, Payments, Adjustments)
- Charges By Date (Daily Charges)
- Charges / Payments By Financial Class
- AR Analysis Last 13 Months
- Payment Lag
- Receivable Analysis

**AR Reports**

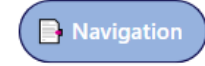
- AR Analysis (Insurance Totals)
- AR Analysis (Self Pay Totals)
- AR Analysis Bad Debt (Totals)
- Monthly Changes AR (Totals)
- 13 Month View (Charges, Payments, Adjustments)
- AR Analysis Last 13 Months

**Charges, Payments, Adjustments, Refunds**

- Monthly Charges (Totals)
- Monthly Payments (Totals)
- Monthly Adjustments (Totals)
- Monthly Refunds (Totals)
- Charges By Date (Daily Charges)
- Charges / Payments By Financial Class

**Overviews**

- Profit Overview (Dashboard)
- Appointment Analysis
- Payment Lag
- Receivable Analysis



Use this button on all pages to navigate back to this page.

*This is a collection of AR related reports. This section contains data on multiple options regarding AR Reporting. The raw data page can be accessed via the link and navigating to the page next to the selected page.*

*This collection contains reports related to Charges, Payments, Adjustments, and Refunds. This contains a monthly overview page link and the raw data is available on the next page of each of the monthly reports. This also contains a daily charges break down report and a breakdown by financial classes*

*This is a collection of more overview style reports and dashboards. This contains an overview of Charges, Payments, Adjustments, Receivables, and Payment Lag. This also contains reporting on appointments.*





# FY Visits

Financial class and location encounter counts. Has YTD totals as well.

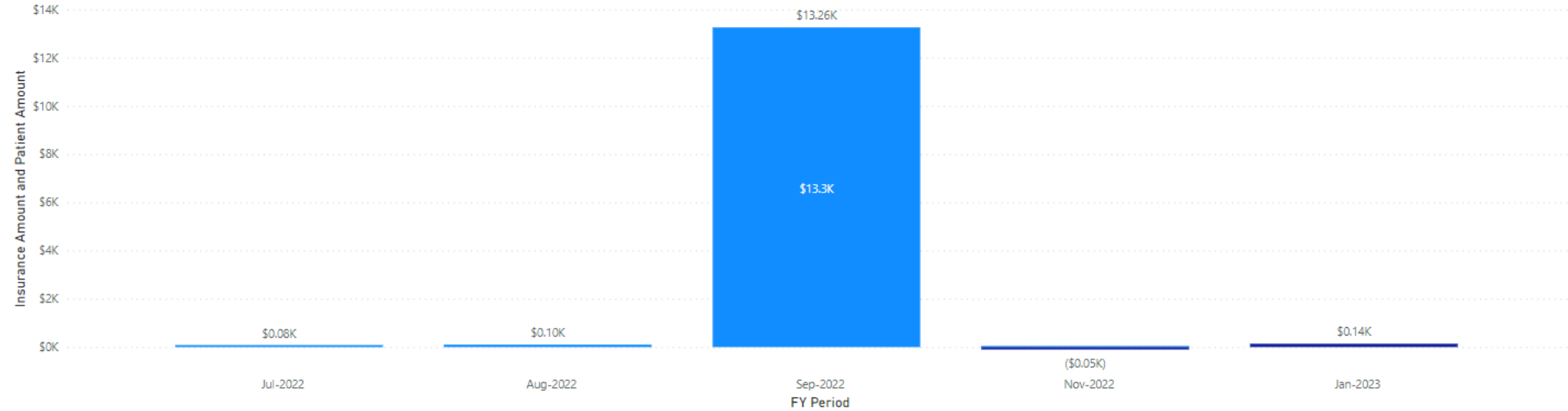
## 1: Dashboard



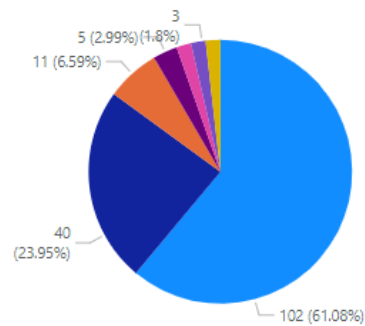
Practice: 
 Location: 
 Provider: 
 Financial Class: 
 FY Date:

Insurance Amount, Patient Amount and # of Encounters by FY Period (Current Bucket Amounts)

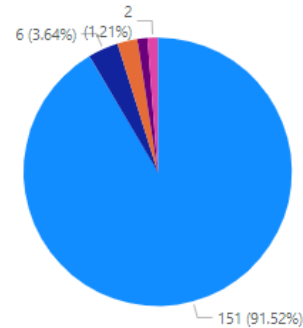
● Insurance Amount ● Patient Amount



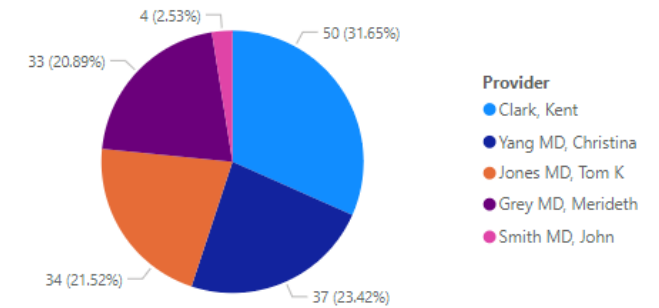
Top 5 Financial Class (# of Encounters)



Top 5 Locations (# of Encounters)



Top 5 Providers (# of Encounters)



Confidential and Proprietary

# FY Visits

Provider Encounter Counts. Has YTD totals as well.

## 2: Raw Data



Practice: 
 Location: 
 Financial Class: 
 FY Date:

168

Grand Total # Encounters

Practice	Provider	Provider	MRN	Person #	Financial Class	Encounter #	Encounter Date	Process Date	FY Period	FY Start Date	FY End Date	FY Workdays	Total Charge Amount	Total Charges	Total Insurance Amount	Total Patient Amount
MTS Clinic	MTS Clinic	Weaver MD, Carrie	312	369	Medicare	5089	9/16/2022	9/16/2022	Sep-2022	9/1/2022	9/30/2022	29	\$6,570.00	1	\$6,570.00	\$0.00
MTS Clinic	MTS Clinic	Yang MD, Christina	13	22	Medicare	5088	9/16/2022	9/16/2022	Sep-2022	9/1/2022	9/30/2022	29	\$6,570.00	1	\$6,570.00	\$0.00
MTS Clinic	South Clinic	Jones MD, Tom K	334	391	Self Pay	5145	1/27/2023	2/6/2023	Jan-2023	1/1/2023	1/31/2023	30	\$175.00	1	\$0.00	\$140.00
MTS Clinic	Mpls Office	Grey MD, Merideth	29	39	BCBS	5087	9/12/2022	9/12/2022	Sep-2022	9/1/2022	9/30/2022	29	\$115.00	1	\$115.00	\$0.00
MTS Clinic	MTS Clinic	Yang MD, Christina	333	390	Work Comp	5071	7/26/2022	7/26/2022	Jul-2022	7/1/2022	7/31/2022	30	\$82.50	1	\$82.50	\$0.00
MTS Clinic	Mpls Office	White PA, Heather	312	369	Health Partners	5083	8/31/2022	9/9/2022	Aug-2022	8/1/2022	8/31/2022	30	\$50.00	1	\$50.00	\$0.00
MTS Clinic	MTS Clinic	Grey MD, Merideth	47	53	Health Partners	5081	8/17/2022	8/17/2022	Aug-2022	8/1/2022	8/31/2022	30	\$50.00	1	\$50.00	\$0.00
MTS Clinic	North Clinic	Jones MD, Tom K	55	66	Medica	5109	11/3/2022	11/3/2022	Nov-2022	11/1/2022	11/30/2022	29	\$47.00	1	\$47.00	\$0.00
MTS Clinic	MTS Clinic	Yang MD, Christina	347	404	Commercial	5146	1/30/2023	2/6/2023	Jan-2023	1/1/2023	1/31/2023	30	\$33.00	2	\$0.00	\$0.00
MTS Clinic	Mpls Office	Grey MD, Merideth	29	39	Self Pay	5090	9/19/2022		Sep-2022	9/1/2022	9/30/2022	29	\$0.00	0		
MTS Clinic	Mpls Office	Jones MD, Tom K	348	405	Commercial	5150	2/1/2023		Feb-2023	2/1/2023	2/28/2023	27	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	12	21	Self Pay	5162	5/8/2023		May-2023	5/1/2023	5/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	24	34	Self Pay	5188	6/28/2023		Jun-2023	6/1/2023	6/30/2023	29	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	24	34	Self Pay	5191	6/30/2023		Jun-2023	6/1/2023	6/30/2023	29	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	24	34	Self Pay	5205	7/11/2023		Jul-2023	7/1/2023	7/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	24	34	Self Pay	5206	7/13/2023		Jul-2023	7/1/2023	7/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	24	34	Self Pay	5210	7/18/2023		Jul-2023	7/1/2023	7/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	24	34	Self Pay	5211	7/18/2023		Jul-2023	7/1/2023	7/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	24	34	Self Pay	5227	8/15/2023		Aug-2023	8/1/2023	8/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	24	34	Self Pay	5241	9/22/2023		Sep-2023	9/1/2023	9/30/2023	29	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	29	39	BCBS	5163	5/8/2023		May-2023	5/1/2023	5/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	38	48	Commercial	5196	6/30/2023		Jun-2023	6/1/2023	6/30/2023	29	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	38	48	Commercial	5197	6/30/2023		Jun-2023	6/1/2023	6/30/2023	29	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	46	49	Medicare	5195	6/30/2023		Jun-2023	6/1/2023	6/30/2023	29	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	166	217	Medicaid	5185	6/27/2023		Jun-2023	6/1/2023	6/30/2023	29	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	201	264	Self Pay	5177	5/23/2023		May-2023	5/1/2023	5/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	201	264	Self Pay	5179	5/30/2023		May-2023	5/1/2023	5/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	201	264	Self Pay	5189	6/30/2023		Jun-2023	6/1/2023	6/30/2023	29	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	201	264	Self Pay	5198	7/3/2023		Jul-2023	7/1/2023	7/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	201	264	Self Pay	5199	7/3/2023		Jul-2023	7/1/2023	7/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	201	264	Self Pay	5200	7/3/2023		Jul-2023	7/1/2023	7/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	201	264	Self Pay	5218	7/28/2023		Jul-2023	7/1/2023	7/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	201	264	Self Pay	5221	7/28/2023		Jul-2023	7/1/2023	7/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	201	264	Self Pay	5224	7/28/2023		Jul-2023	7/1/2023	7/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	205	267	BCBS	5167	5/19/2023		May-2023	5/1/2023	5/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	205	267	BCBS	5173	5/22/2023		May-2023	5/1/2023	5/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	205	267	BCBS	5174	5/23/2023		May-2023	5/1/2023	5/31/2023	30	\$0.00	0		
MTS Clinic	MTS Clinic	Clark, Kent	205	267	BCBS	5180	6/15/2023		Jun-2023	6/1/2023	6/30/2023	29	\$0.00	0		



# FY Visits

## 3: Yearly Summary

Raw data encounter details.



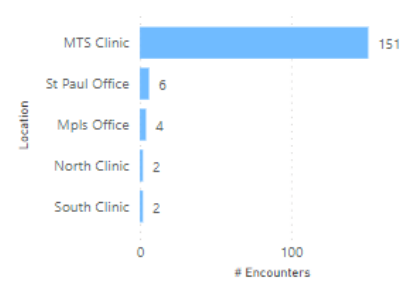
Practice  
All

Location  
All

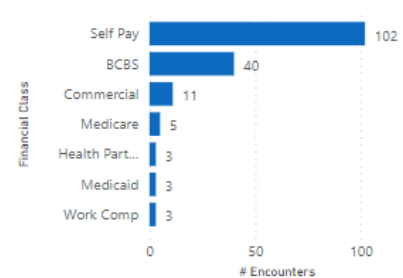
Provider  
All

Financial Class  
All

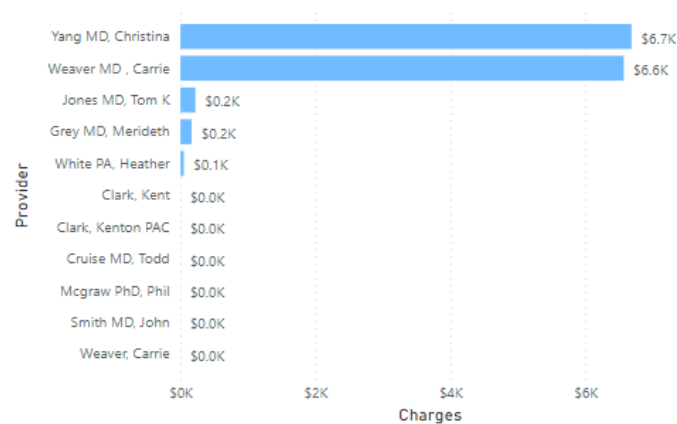
Top 5 Locations By # Encounters



Top 5 Financial Class By # Encounters



Top 10 Providers By Charge Amount

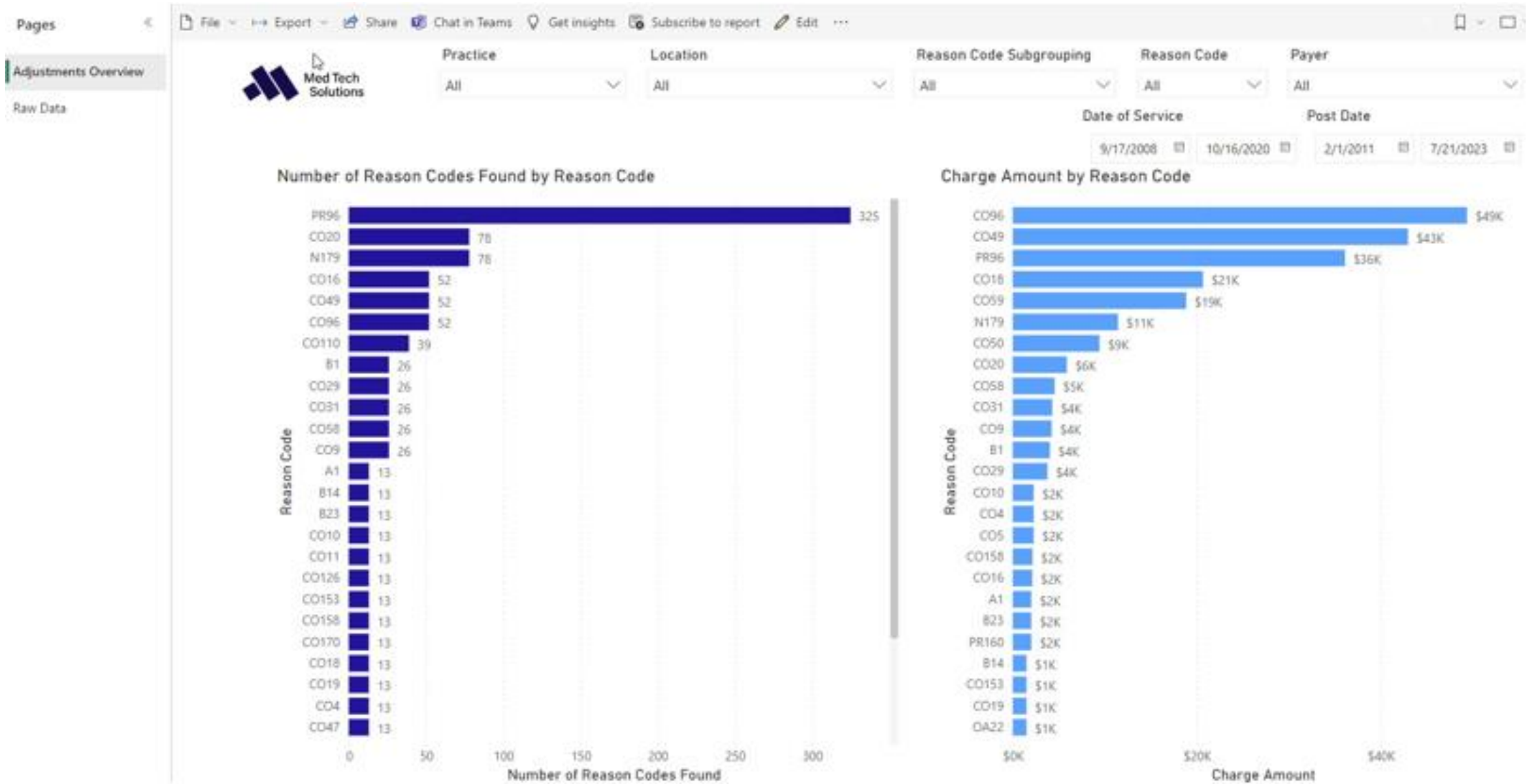


# Encounters		Total Charges		Total Ins. Amount		Total Pat. Amount	
10	10	\$82.50	\$82.50	\$82.5	\$82.5	\$0	\$0
Aug-2022 MTD	Aug-2022 MTD	Aug-2022 MTD	Aug-2022 YTD	Aug-2022 MTD	Aug-2022 YTD	Aug-2022 MTD	Aug-2022 YTD
11	21	\$100.00	\$182.50	\$100	\$182.5	\$0	\$0
Sep-2022 MTD	Sep-2022 YTD	Sep-2022 MTD	Sep-2022 YTD	Sep-2022 MTD	Sep-2022 YTD	Sep-2022 MTD	Sep-2022 YTD
5	26	\$100.00	\$13.44K	\$13.26K	\$13.44K	\$0	\$0
Oct-2022 MTD	Oct-2022 YTD	Oct-2022 MTD	Oct-2022 YTD	Oct-2022 MTD	Oct-2022 YTD	Oct-2022 MTD	Oct-2022 YTD
15	41	\$0.00	\$282.50	(Blank)	\$13.44K	(Blank)	\$0
Nov-2022 MTD	Nov-2022 YTD	Nov-2022 MTD	Nov-2022 YTD	Nov-2022 MTD	Nov-2022 YTD	Nov-2022 MTD	Nov-2022 YTD
6	47	\$47.00	\$329.50	\$47	\$13.48K	(\$100)	(\$100)
Dec-2022 MTD	Dec-2022 YTD	Dec-2022 MTD	Dec-2022 YTD	Dec-2022 MTD	Dec-2022 YTD	Dec-2022 MTD	Dec-2022 YTD
14	61	\$0.00	\$329.50	(Blank)	\$13.48K	(Blank)	(\$100)
Jan-2023 MTD	Jan-2023 YTD	Jan-2023 MTD	Jan-2023 YTD	Jan-2023 MTD	Jan-2023 YTD	Jan-2023 MTD	Jan-2023 YTD
17	78	\$208	\$537.5	\$0	\$13.48K	\$140	\$40
Feb-2023 MTD	Feb-2023 YTD	Feb-2023 MTD	Feb-2023 YTD	Feb-2023 MTD	Feb-2023 YTD	Feb-2023 MTD	Feb-2023 YTD
5	83	\$0	\$537.5	(Blank)	\$13.48K	(Blank)	\$40
Mar-2023 MTD	Mar-2023 YTD	Mar-2023 MTD	Mar-2023 YTD	Mar-2023 MTD	Mar-2023 YTD	Mar-2023 MTD	Mar-2023 YTD
3	86	\$0	\$537.5	(Blank)	\$13.48K	(Blank)	\$40
Apr-2023 MTD	Apr-2023 YTD	Apr-2023 MTD	Apr-2023 YTD	Apr-2023 MTD	Apr-2023 YTD	Apr-2023 MTD	Apr-2023 YTD
1	87	\$0	\$537.5	(Blank)	\$13.48K	(Blank)	\$40
May-2023 MTD	May-2023 YTD	May-2023 MTD	May-2023 YTD	May-2023 MTD	May-2023 YTD	May-2023 MTD	May-2023 YTD
20	107	\$0.00	\$537.5	(Blank)	\$13.48K	(Blank)	\$40
Jun-2023 MTD	Jun-2023 YTD	Jun-2023	Jun-2023 YTD	Jun-2023 MTD	Jun-2023 YTD	Jun-2023 MTD	Jun-2023 YTD
18	125	\$0.00	\$537.50	(Blank)	\$13.48K	(Blank)	\$40.00
Jul-2023 MTD	Jul-2023 YTD	Jul-2023 MTD	Jul-2023 YTD	Jul-2023 MTD	Jul-2023 YTD	Jul-2023	Jul-2023 YTD
29	154	\$0.00	\$537.50	(Blank)	\$13.48K	(Blank)	\$40.00
Aug-2023 MTD	Aug-2023 YTD	Aug-2023 MTD	Aug-2023 YTD	Aug-2023 MTD	Aug-2023 YTD	Aug-2023 MTD	Aug-2023 YTD

# Adjustments by Reason Code

Denials and adjustments by reason code.

1: Dashboard



# Adjustments by Reason Code

Denials and adjustments by reason code.

## 2: Raw Data



Practice: All 
 Location: All 
 Reason Code Subgrouping: All 
 Reason Code: All 
 Post Date: 1/1/2015  6/30/2023

Practice	Location	Encounter Provider	MRN	Person #	Encounter #	FY Period	FY Start Date	FY End Date	Date of Service	Process Date	Payer
MTS Clinic	MTS Clinic	Yang MD, Christina	11	20	85				9/17/2008	9/11/2015	Medicare
MTS Clinic	Elk River Office	Grey MD, Merideth	43	38	454				5/16/2011	9/11/2015	Blue Cross Blue Shield
MTS Clinic	MTS Clinic	Grey MD, Merideth	45	56	1048				9/4/2012	9/11/2015	Blue Cross Blue Shield
MTS Clinic	MTS Clinic	Grey MD, Merideth	46	49	1865				5/15/2015	5/15/2015	Medica
MTS Clinic	MTS Clinic	Grey MD, Merideth	46	49	1865				5/15/2015	5/15/2015	Medica
MTS Clinic	MTS Clinic	Mcgraw PhD, Phil	46	49	1868				5/13/2015	5/15/2015	Medica
MTS Clinic	MTS Clinic	Mcgraw PhD, Phil	46	49	1870				5/11/2015	5/15/2015	Medica
MTS Clinic	MTS Clinic	Cruise MD, Todd	3	10	1994				7/30/2015	7/18/2016	WC Payer C (Payer, Els Map)
MTS Clinic	MTS Clinic	Cruise MD, Todd	3	10	1994				7/30/2015	7/18/2016	WC Payer C (Payer, Els Map)
MTS Clinic	MTS Clinic	Grey MD, Merideth	195	252	2011				8/4/2015	9/11/2015	Medicare
MTS Clinic	MTS Clinic	Grey MD, Merideth	195	252	2011				8/4/2015	9/11/2015	Aetna
MTS Clinic	Elk River Office	Grey MD, Merideth	46	49	2023				8/18/2015	9/30/2015	Medica
MTS Clinic	MTS Clinic	Grey MD, Merideth	75	86	2087				8/5/2015	9/1/2015	Medica Sr Plan
MTS Clinic	MTS Clinic	Grey MD, Merideth	75	86	2087				8/5/2015	9/1/2015	Medica Sr Plan
MTS Clinic	MTS Clinic	Grey MD, Merideth	46	49	2088				8/12/2015	9/1/2015	Health Partners Sr Pla
MTS Clinic	MTS Clinic	Grey MD, Merideth	46	49	2088				8/12/2015	9/1/2015	Health Partners Sr Pla
MTS Clinic	MTS Clinic	Grey MD, Merideth	225	287	2119				12/16/2015	2/1/2016	Medicare
MTS Clinic	MTS Clinic	Grey MD, Merideth	249	293	2314				7/13/2016	9/27/2016	Aetna
MTS Clinic	MTS Main Optical	Mcgraw PhD, Phil	46	49	2348				7/20/2016	11/28/2016	Patient Choice
MTS Clinic	MTS Clinic	Grey MD, Merideth	170	221	2382				7/13/2016	8/9/2016	WC Risk Benefits
MTS Clinic	MTS Clinic	Grey MD, Merideth	221	222	2165				8/11/2016	8/15/2017	Blue Cross Blue Shield





# Self Pay Encounters

Self pay patient encounters with chart level payers present.



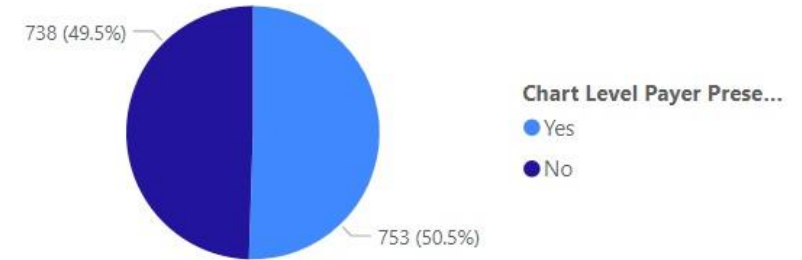
## Self-Pay Encounter List with Chart Level Payers Present or Not Present on Patients Seen

**Practice**: All  
**Location**: All  
**Provider**: All  
**Chart Level Payer Present**: All  
**Encounter Date**: 11/2/2007 to 9/25/2023  
**FY Report Period**: All

### Self Pay Encounters

Practice	Location	Provider	Person #	MRN	Encounter #	Encounter Date
Ambulatory Surgery Center	Mpls Office	Grey MD, Merideth	102	14	23	9/14/2011
Ambulatory Surgery Center	Mpls Office	Grey MD, Merideth	202	11	17	9/9/2011
Ambulatory Surgery Center	Mpls Office	Yang MD, Christina	169	25	34	11/1/2011
Ambulatory Surgery Center	WestHealth Surgery Center	Grey MD, Merideth	139	18	27	9/13/2011
Ambulatory Surgery Center	WestHealth Surgery Center	Grey MD, Merideth	57	15	24	8/30/2011
Ambulatory Surgery Center	WestHealth Surgery Center	Yang MD, Christina	193	21	30	9/21/2011
Ambulatory Surgery Center	WestHealth Surgery Center	Yang MD, Christina	54	20	29	9/19/2011
MTS Clinic	*Elk River Office	Grey MD, Merideth	290	315	4880	1/13/2022
MTS Clinic	*Elk River Office	Grey MD, Merideth	384	326	4924	2/17/2022
MTS Clinic	*Elk River Office	Grey MD, Merideth	385	327	4925	2/17/2022
MTS Clinic	*Elk River Office	Grey MD, Merideth	386	328	4926	2/17/2022
MTS Clinic	*Elk River Office	Grey MD, Merideth	387	329	4927	2/17/2022
MTS Clinic	*Elk River Office	Weaver MD, Carrie	254	320	3850	7/12/2021
MTS Clinic	*Elk River Office	Weaver MD, Carrie	254	320	4797	7/30/2021
MTS Clinic	*Elk River Office	Yang MD, Christina	377	322	4815	8/12/2021
MTS Clinic	*Elk River Office	Yang MD, Christina	377	322	4818	8/13/2021
MTS Clinic	*Elk River Office	Yang MD, Christina	385	327	4951	3/3/2022

### # Payers Found by Chart Level Payer Present



### Chart Level Payers

Person #	MRN	Payer	Plan #	Pol
10	3	WC Payer C (Payer, Else General Map)		1471
102	14	WC Allstate		4558
104	104	Medica MA		5011141
108	79	Blue Plus		XZAXZ
108	79	Medicare		5454
11	26	Health Partners MA		456
11	26	WC Payer D (No Mappings)		
118	80	Preferred One PPO		434
12	4	Blue Cross Blue Shield		XZPXZ
122	81	WC Payer A (General Tab Mappings)		4668
129	135	Health Partners MA		081
13	5	Blue Cross Blue Shield		Xzaxz
13	5	Health Partners		545
136	106	MN Medicaid		051
15	7	Blue Plus		BDS45
159	91	Medicare		3351
159	91	MN Medicaid		456
164	97	Patient Choice		4658

# Bad Debt Analysis

All bad debt transactions with up to 6 reason codes associated.



View Bad Debt Transactions and 6 Reason Codes Associated with transactions. Select Filters to see specific data on grid below

Provider: 
 Financial Class: 
 Payer: 
 Location: 
 Pre List Eff Date:  to

MRN Nbr	Provider	Financial Class	Payer	Amount	Reason Code 1	Reason Code 2	Reason Code 3	Reason Code 4	Reason Code 5	Reason Code 6
0000000166	Cruise MD, Todd	Medica	Medica	\$0.00						
0000000003	Cruise MD, Todd	Work Comp	WC Payer C (Payer, Else General Map)	\$155.00	A1 (Claim denied charges.)	B1 (Non-covered visits.)				
	Cruise MD, Todd	Private Pay	Private Pay	\$95.00						
0000000037	Cruise MD, Todd	Private Pay	Private Pay	\$95.00						
	Cruise MD, Todd	Private Pay	Private Pay	\$220.00						
0000000037	Cruise MD, Todd	Private Pay	Private Pay	\$220.00						
0000000105	Cruise MD, Todd	Medica	Medica MA	\$0.00	COINS (Co-Insurance)	CoPay (Co-Pay)				
0000000114	Cruise MD, Todd	Medicare	Humana Gold Sr Plan	\$27.18						
0000000113	Cruise MD, Todd	Medica	Medica Sr Plan	\$36.00						
0000000134	Grey MD, Merideth	BCBS	Blue Cross Blue Shield Federal	\$30.00						
0000000134	Grey MD, Merideth	BCBS	Blue Cross Blue Shield Federal	\$20.00						
0000000166	Grey MD, Merideth	Medica	Medica	\$265.00						
0000000052	Grey MD, Merideth	Medica	Medica	\$55.00						
0000000117	Grey MD, Merideth	Health Partners	Health Partners Sr Plan	\$60.00						
0000000076	Grey MD, Merideth	Commercial	Champus	\$2,200.00						
0000000138	Grey MD, Merideth	Commercial	Preferred One PPO	\$302.01						
	Grey MD, Merideth	Medica	Medica	\$25.00						
0000000022	Grey MD, Merideth	Medica	Medica	\$25.00						
0000000046	Grey MD, Merideth	Medica	Medica	\$25.00						
	Grey MD, Merideth	Medica	Medica	\$150.00	CO11 (The diagnosis is inconsistent with th...)					
0000000022	Grey MD, Merideth	Medica	Medica	\$150.00	CO11 (The diagnosis is inconsistent with th...)					
0000000046	Grey MD, Merideth	Medica	Medica	\$150.00	CO11 (The diagnosis is inconsistent with th...)					
	Grey MD, Merideth	RailRoad Medicare	AARP Health Care Options	\$150.00						
0000000022	Grey MD, Merideth	RailRoad Medicare	AARP Health Care Options	\$150.00						
0000000046	Grey MD, Merideth	RailRoad Medicare	AARP Health Care Options	\$150.00						
	Grey MD, Merideth	Health Partners	Health Partners Sr Plan	\$90.00	PR96 (Non-covered charge(s.))					
				<b>\$47,980.48</b>						



# Contractual Analysis Over Payment Report

Track over, under and equal payments by payer contracts.

1: Overview

Overview

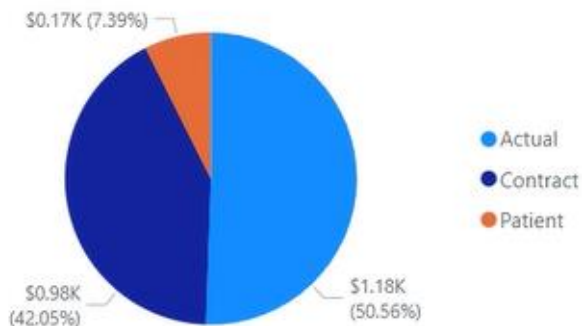
Raw Data



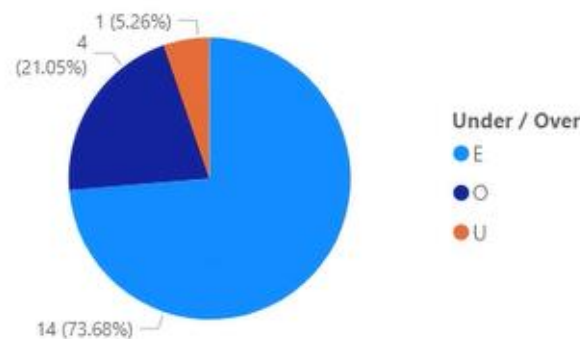
## Contract Pay Overview

Practice: 
 Contract: 
 Payer: 
 Over / Under: 
 Process Date:  to

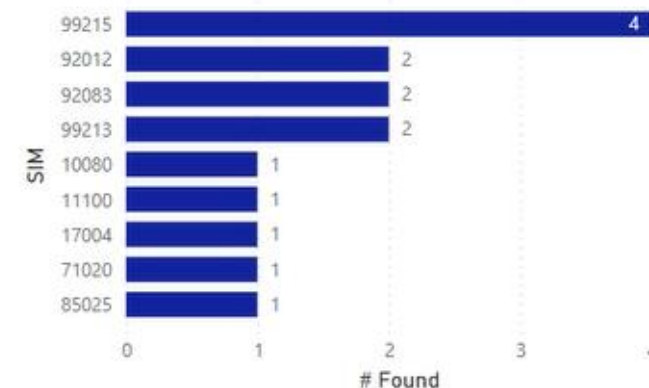
Total Amounts



# Over / Under Found by Under / Over



# Over / Under Found by SIM



% Over / Under by Payer

Payer	% Actual Over	% Actual Under	% Contract Over	% Contract Under
BCBS Contract	5.50%		4.45%	
Blue Cross Blue Shield	10.96%		0.00%	
Medicare	89.01%	10.99%	0.00%	100.00%
<b>Total</b>	<b>20.03%</b>	<b>1.69%</b>	<b>2.85%</b>	<b>3.05%</b>

% Over / Under by Contract

Contract	% Actual Over	% Actual Under	% Contract Over
BCBS Fee For Service	7.49%		2.94%
Capitated HMO With Some Billable Charges	89.01%	10.99%	0.00%
<b>Total</b>	<b>20.03%</b>	<b>1.69%</b>	<b>2.85%</b>

% Over / Under by Financial Class

Financial Class	% Actual Over	% Actual Under	% Contract Over	% Contract Under
Medicare	89.01%	10.99%	0.00%	100.00%
BCBS	7.49%		2.94%	
<b>Total</b>	<b>20.03%</b>	<b>1.69%</b>	<b>2.85%</b>	<b>3.05%</b>

# Contractual Analysis Over Payment Report

Track over, under and equal payments by payer contracts.

2: Raw Data



## Contract Analysis

Practice: 
 Contract: 
 Payer: 
 Over / Under: 
 Process Date:  to

Pers on #	MRN	Encounter NBR	CPT Code	Process Date	Under	Over	Actual Allowed	Contract Allowed	Patient AMT	Charge Amt	Payer Name	Contract Name	
		350	99215	9/28/2007	E			\$0.00	\$0.00	\$110.00	Medicare Part B Contract	Capitated HMO With Some Billable Charges	Sam
10	2	66	11100	1/17/2007	E		\$134.00	\$134.00	\$0.00	\$134.00	Blue Cross Blue Shield	BCBS Fee For Service	Soutl
10	2	66	17004	1/17/2007	E		\$31.00	\$31.00	\$0.00	\$31.00	Blue Cross Blue Shield	BCBS Fee For Service	Soutl
10	2	307	99202	2/14/2007	E		\$55.00	\$55.00	\$11.00	\$105.00	Blue Cross Blue Shield	BCBS Fee For Service	Soutl
9	22	304	99215	1/30/2007	O		\$40.00	\$0.00	\$8.00	\$110.00	Blue Cross Blue Shield	BCBS Fee For Service	West
1127	24	70	71020	1/22/2007	E		\$59.00	\$59.00	\$0.00	\$55.00	BCBS Contract	BCBS Fee For Service	Coas
1127	24	70	85025	1/22/2007	E		\$4.00	\$4.00	\$0.00	\$6.00	BCBS Contract	BCBS Fee For Service	Coas
1127	24	70	99201	1/22/2007	E		\$50.00	\$50.00	\$0.00	\$100.00	BCBS Contract	BCBS Fee For Service	Coas
1127	24	269	99213	11/4/2007	O		\$35.00	\$28.00	\$27.00	\$100.00	BCBS Contract	BCBS Fee For Service	West
1127	24	448	92012	1/19/2009	E		\$44.00	\$44.00	\$10.00	\$44.00	BCBS Contract	BCBS Fee For Service	Dow
1127	24	448	92083	1/19/2009	E		\$100.00	\$100.00	\$0.00	\$100.00	BCBS Contract	BCBS Fee For Service	Dow
1127	24	448	92135	1/19/2009	E		\$200.00	\$200.00	\$20.00	\$200.00	BCBS Contract	BCBS Fee For Service	Dow
1127	24	449	92012	1/19/2009	E		\$44.00	\$44.00	\$0.00	\$44.00	BCBS Contract	BCBS Fee For Service	Dow
1127	24	449	92083	1/19/2009	E		\$100.00	\$100.00	\$0.00	\$100.00	BCBS Contract	BCBS Fee For Service	Dow
1133	32	1323	99213	9/18/2017	O		\$92.00	\$0.00	(\$3.00)	\$100.00	Medicare	Capitated HMO With Some Billable Charges	West
1133	32	2323	99215	2/12/2020	E			\$0.00	\$100.00	\$110.00	Medicare	Capitated HMO With Some Billable Charges	CHC
1040	21675	480	10080	2/5/2009	U		\$20.00	\$30.00	\$0.00	\$30.00	Medicare	Capitated HMO With Some Billable Charges	Coas
1040	21675	480	99215	2/5/2009	O		\$70.00	\$0.00	\$0.00	\$110.00	Medicare	Capitated HMO With Some Billable Charges	Coas
1	2949294	71	99214	3/4/2008	E		\$105.00	\$105.00	\$0.00	\$105.00	Blue Cross Blue Shield	BCBS Fee For Service	West
<b>Total</b>							<b>\$1,183.00</b>	<b>\$984.00</b>	<b>\$173.00</b>	<b>\$1,694.00</b>			



Confidential and Proprietary

# NextGen System Reports

7 Report Packages





# BBP Details

BBP application use and trending results of it's use.



## Background Business Processor Details

BBP Package

BBP Job

Run Result

Job Type

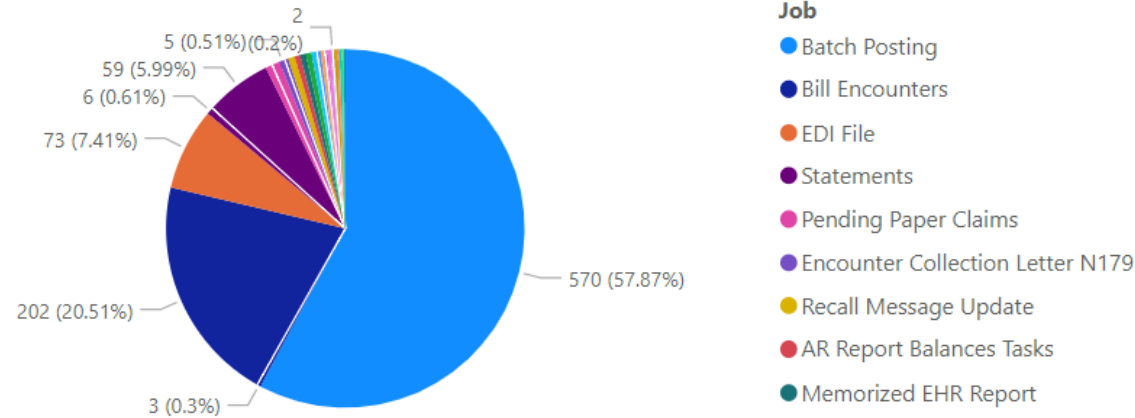
Job Run Date

5/4/2011

6/7/2021



# of Result by Job and Run Result



00:00:02

Shortest Job Duration

88.73 %

% Success

00:49:44

Longest Job Duration

11.27 %

% Failed

### BBP Job Details

BBP Server	Package	Job	Schedule	Job Run Date
MHITTERM1	Bill Encounters	Bill Encounters	Billing Process	2/14/2017 6:00:53 A
MHITTERM1	Bill Encounters	Bill Encounters	Billing Process	12/17/2016 6:01:11
MHITTERM1	Bill Encounters	Bill Encounters	Run Once - queued at 07/18/2016 01:05:54.333 PM	7/18/2016 1:06:30 P
MHITTERM1	Bill Encounters	Bill Encounters	Billing Process	11/19/2016 6:01:08
MHITTERM1	Bill Encounters	Bill Encounters	Billing Process	12/13/2016 6:01:02
MHITTERM1	Bill Encounters	Bill Encounters	Billing Process	12/10/2016 6:00:41
MHITTERM1	Bill Encounters	Bill Encounters	Billing Process	12/18/2016 6:01:06
MHITTERM1	Bill Encounters	Bill Encounters	Billing Process	11/30/2016 6:01:02
MHITTERM1	Bill Encounters	Bill Encounters	Billing Process	12/2/2016 6:01:03 A
MHITTERM1	Bill Encounters	Bill Encounters	Billing Process	10/12/2016 6:00:38
MHITTERM1	Bill Encounters	Bill Encounters	Billing Process	12/16/2016 6:00:56

### BBP Run Results

Run Result Job	Failed		Succeeded	
	# of Result	% of Result	# of Result	% of Result
3Q Monthly Change In AR	4	100.00%		
AR Report Balances Tasks			5	100.00%
Bad Debt By Practice			3	100.00%
Batch Posting			570	100.00%
BBP Task Creation			2	100.00%
Bill Encounters	3	1.46%	202	98.54%
Blank Package	1	33.33%	2	66.67%
EDI File	73	100.00%		
EHR Report For Tasks From BBP			2	100.00%
Encounter Collection Letter	5	62.50%	3	37.50%



# General NextGen Information

Used to display NextGen version, medication version, licensing details, etc.

## 1: Overview



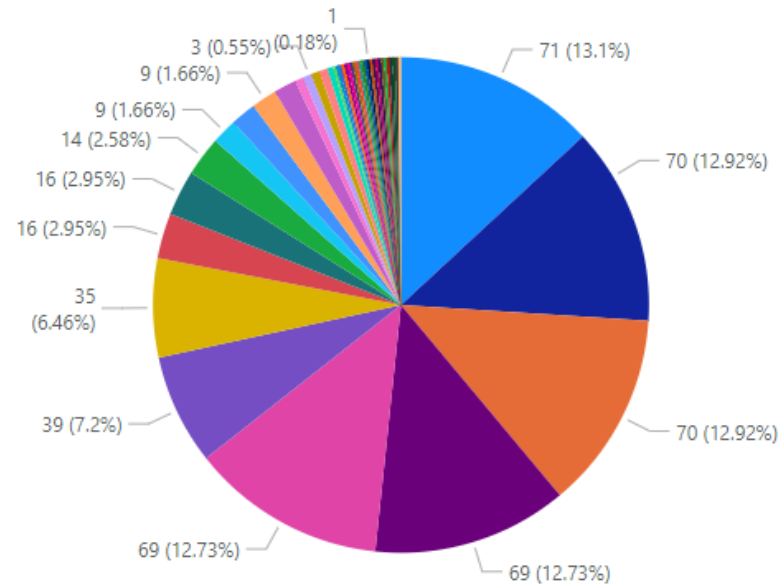
### General NextGen Information

Licensed Applications, SQL Version, NextGen Version, Ancillary Updates Version Information

Application Name

All

### # of Licenses by Application



#### Application

- PM User
- Doc Mgmt Barcode Engine
- Document Management User
- Dashboard User
- EHR User
- Doc Mgmt OCR User
- NextGen Patient Chart Sync
- EHR Provider
- PM Provider
- NextGen Eligibility Verification
- API External Access
- Dashboard Provider
- Healthwise Provider
- Patient Portal Provider
- Document Monitor Provider

### SQL Server Version Information

Database Name: PowerBiReports  
 Full Text Installed: TRUE  
 Operating System: Windows Server 2016 Standard NT x64 6.3 (14393)  
 Product Version: Microsoft SQL Server 2017 14.0.2037.2 (RTM) Standard Edition (64-bit)  
 Server Collation: SQL\_Latin1\_General\_CP1\_CI\_AS  
 Server Name: MTSMN16SQL01

### NextGen Version Information

Type: Current NextGen Application Version: NextGen 6.0.0.209 Patch 53  
 ACE Version Information (KBM): 8.4.5.266

### Medication / CDL / Formulary / VIS Update Information

Version	Install Date	Status / Modified Date
202201	Mar 10 2022 1:34PM	Successfully Complete
202011-C	Apr 1 2021 2:40PM	Successfully Complete
02/12/2018	Jan 10 2019 7:00AM	Jan 10 2019 7:00AM

#### Application

#### # of Licenses

PM User	71
Doc Mgmt Barcode Engine	70
Document Management User	70
Dashboard User	69
EHR User	69
Doc Mgmt OCR User	39
NextGen Patient Chart Sync	35
EHR Provider	16
PM Provider	16
NextGen Eligibility Verification	14
API External Access	9
Dashboard Provider	9
Healthwise Provider	9
Patient Portal Provider	8
Document Monitor Provider	3
NextGen Patient Education Provider	3
Patient Portal Real Time Scheduling	3
Provider Formulary	3
Provider Extended Med Data	2
ACP/Pier	1
<b>Total</b>	<b>542</b>

# General NextGen Information

Used to display NextGen version, medication version, licensing details, etc.

## 2: Raw Data

9/19/2008

9/30/2022

Earliest Last Login Date

Most Recent Last Login Date

### Provider List

Product	User Full Name	NG Login	Provider City	Provider State	Provider Zip	Provider Phone	Provider Fax	Provider
Dashboard Provider	Christina Yang MD	christy yang	Minneapolis	MN	554412606	(952) 838-6800		FCCEFDI
Dashboard Provider	John Smith MD	jsmith	Minneapolis	MN	554412606	(952) 838-5522		C86E6BF
Dashboard Provider	Merideth Grey MD	mgrey1	Minneapolis	MN	554412606	(952) 838-6800	(658) 554-5254	09A578A
Dashboard Provider	Tom Jones MD	tjones	Minneapolis	MN	55414	(952) 838-6800		28FF3A9
EAS Provider	Christina Yang MD	christy yang	Minneapolis	MN	554412606	(952) 838-6800		FCCEFDI
EHR Provider	Carrie Weaver MD	cweaver	Minneapolis	MN	554355288	(952) 838-6800		8137085
EHR Provider	Christina Yang MD	christy yang	Minneapolis	MN	554412606	(952) 838-6800		FCCEFDI
EHR Provider	Jennifer Green AC	jgreen						4622948
EHR Provider	John Smith MD	jsmith	Minneapolis	MN	554412606	(952) 838-5522		C86E6BF
EHR Provider	Merideth Grey MD	mgrey1	Minneapolis	MN	554412606	(952) 838-6800	(658) 554-5254	09A578A
EHR Provider	Tom Jones MD	tjones	Minneapolis	MN	55414	(952) 838-6800		28FF3A9
EMD Provider	John Smith MD	jsmith	Minneapolis	MN	554412606	(952) 838-5522		C86E6BF

### User List

Product	User Full Name	User ID	NG Login	Last Login Date
API User	NextGen Admin	0	adminnew	9/30/2022
Document Mangement User	NextGen Admin	0	adminnew	9/30/2022
EHR User	NextGen Admin	0	adminnew	9/30/2022
Patient Sync User	NextGen Admin	0	adminnew	9/30/2022
PM User	NextGen Admin	0	adminnew	9/30/2022
PM User	Cynthia Egli	1	cjegli	3/1/2012
Dashboard User	Dee Wernet	10	dwernet	2/15/2019
Document Manage Barcode Scanner User	Dee Wernet	10	dwernet	2/15/2019
Document Management OCR User	Dee Wernet	10	dwernet	2/15/2019
Document Mangement User	Dee Wernet	10	dwernet	2/15/2019
EHR User	Dee Wernet	10	dwernet	2/15/2019
Patient Sync User	Dee Wernet	10	dwernet	2/15/2019

### Totals

Product	# of Licenses
EHR User	127
PM User	71
Document Mangement User	70
Dashboard User	69
Document Manage Barcode Scanner User	69
Document Management OCR User	39
Patient Sync User	34
PDA User	19
EHR Provider	16
PM Provider	16
EAS User	14
<b>Total</b>	<b>614</b>

# NextGen Template & Document Usage



## NextGen Template & Document Usage

### KBM Templates

Template Name	Version Label	Last Used Date	# of Encounters
fts_intake	KBM 8.4.5.263	2022-03-03	638
fts_soap	KBM 8.4.5.331	2022-03-03	288
Assessment	KBM 8.4.5.235	2022-03-03	163
protocols_due_tracking	KBM 8.4.5.235	2022-03-03	156
fts_intake	KBM 8.4.5.263	2022-02-14	142
fts_histories	KBM 8.4.5.257	2022-03-03	136
ord_custom_plan	KBM 8.4.5.341	2017-10-27	90
fts_soap	KBM 8.4.5.331	2021-07-26	87

### Non KBM Templates

Template Name	Version Label	Last Used Date	# of
TCSC_PT_Orders		2017-01-25	8
INF80_cycle_info		2018-11-13	5
INF80_inf_procedures		2018-11-13	5
INF80_infert_tests		2021-07-14	5
INF80_L_Follicle_size_4		2018-11-27	5
INF80_L_Follicle_size1		2018-11-27	5

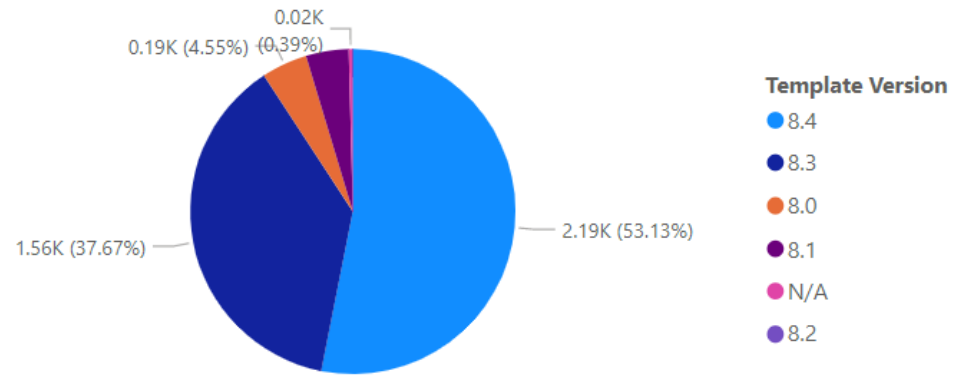
### EHR Documents

Document Name	Last Used Date	First Used Date	# of Encounters
anticoagulation_master	Thursday, August 15, 2019	2018-04-26	2
Asthma_Action_Plan	Tuesday, August 4, 2015	2015-08-04	1
bh_aims	Wednesday, November 6, 2019	2019-11-06	1
bh_brief_assessment	Thursday, January 9, 2020	2020-01-09	1
bh_contract_safety	Monday, October 2, 2017	2014-09-12	2
bh_crisis_treatment_plan	Tuesday, October 1, 2013	2013-10-01	1
bh_group_ther_progress	Friday, September 29, 2017	2017-09-29	1
bh_iap	Friday, April 29, 2016	2016-04-29	1
bh_master	Friday, September 29, 2017	2017-09-29	1

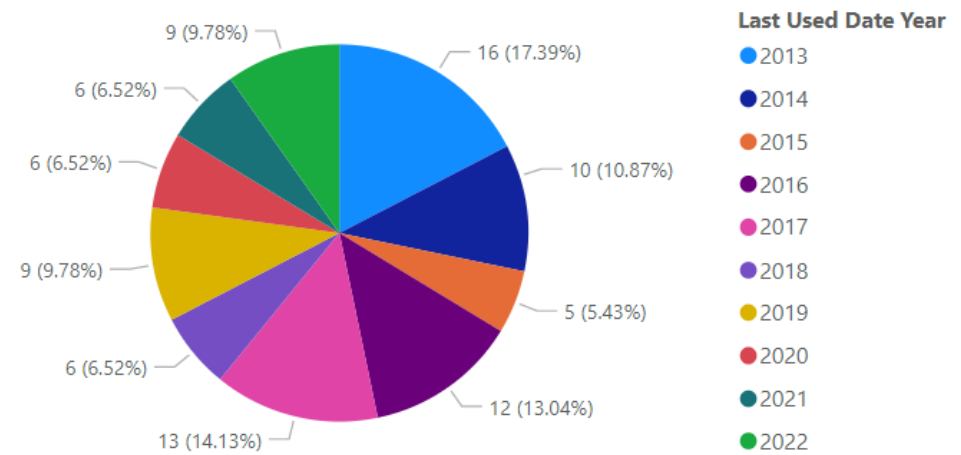
Used as an assistant for Gap Analysis needed during NG upgrades.

KBM Template: 
 Non KBM Template: 
 EHR Document:

# of Template Version



Document Name by Year



# Offline Document Processor Details

Used to gain insight into frequency of use of the EMR doc proc.exe application in NextGen.

Document Types

All

Month

All

Day

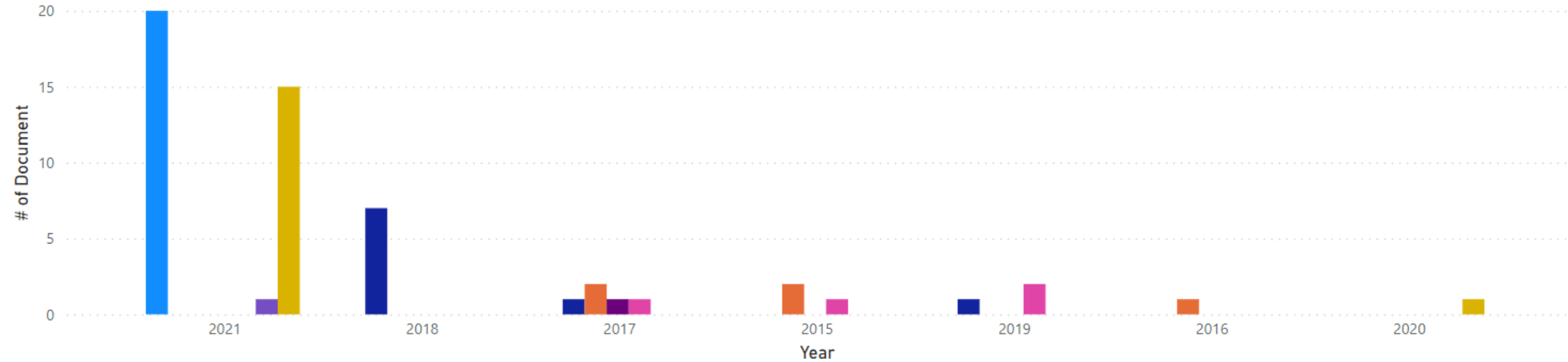
All

Year

All

## # of Document by Year and Document

Document ● Dictation ● intake\_note ● Master\_Im ● OPH\_chart\_note ● Patient Plan ● Procedures ● telephone\_communication



## Document Generation Details

Document	Month	Day	Year
Dictation	9	10	2021
telephone_communication	9	10	2021
Dictation	10	12	2021
Dictation	11	12	2021
Dictation	8	12	2021
Master_Im	4	12	2016
Master_Im	9	12	2017
telephone_communication	10	12	2021
telephone_communication	8	12	2021

## Q1

January	% January	February	% February	March	% March
3	5.36 %	3	5.36 %		

## Q2

April	% April	May	% May	June	% June
1	1.79 %				

## Q3

July	% July	August	% August	September	% September
11	19.64 %	11	19.64 %	19	33.93 %

## Q4

October	% October	November	% November	December	% December
5	8.93 %	3	5.36 %		



# Interface Audit

Page that shows totals of any interface processed in the intrf\_queue table.

## 1: Interface Overview

Pages <<

File Export Share Chat in Teams Get insights Subscribe Edit ...

↶ 🔖 🗨 🔄 💬

**Location**

**Interface Name**

**Message Status**

**Enc. Provider**

**User**

**Interface Message Date**

📅 7/5/2022 - 10/4/2022

**Interface Totals**

Interface	Total	Success	% Success	Failed / Error	% Failed / Error
Patient Portal Encounter CDA	42	0	0.00%	0	0.00%
PXP Locked Encounter	42	0	0.00%	20	47.62%
PxpLongitudinalCcdaRequest0	4	4	100.00%	0	0.00%
PxpLongitudinalCcdaRequest2	3	3	100.00%	0	0.00%
PxpLongitudinalCcdaRequest3	3	3	100.00%	0	0.00%
PxpLongitudinalCcdaRequest1	2	2	100.00%	0	0.00%
<b>Total</b>	<b>96</b>	<b>12</b>	<b>12.50%</b>	<b>20</b>	<b>20.83%</b>

**Location Totals**

Location	Total	Success	% Success	Failed / Error	% Failed / Error
Elk River Office	4	0	0.00%	2	50.00%
Gina's Radiology	4	0	0.00%	2	50.00%
Mpls Office	10	0	0.00%	0	0.00%
MTS Clinic	60	0	0.00%	16	26.67%
MTS Main Optical	4	0	0.00%	0	0.00%
<b>Total</b>	<b>96</b>	<b>12</b>	<b>12.50%</b>	<b>20</b>	<b>20.83%</b>

Interface	Location	Interface Date	MRN	Encounter #	Created By	Interface Details
Patient Portal Encounter CDA	MTS Clinic	7/18/2022	201	5067	Kevin Lisman	
PXP Locked Encounter	MTS Clinic	7/18/2022	201	5067	Kevin Lisman	The option 'Code_Tables_External_System_Name' must be configured to use the C32 external system (Id = '90020')
Patient Portal Encounter CDA	MTS Clinic	7/21/2022	3	5066	Robert Woolley	
Patient Portal Encounter CDA	MTS Clinic	7/21/2022	16	5066	Robert Woolley	
Patient Portal Encounter CDA	MTS Clinic	7/21/2022	38	5066	Robert Woolley	
Patient Portal Encounter CDA	MTS Clinic	7/21/2022	201	5065	Robert Woolley	
Patient Portal Encounter CDA	MTS Clinic	7/21/2022	201	5068	Kevin Lisman	
Patient Portal Encounter CDA	MTS Clinic	7/21/2022	316	5069	Robert Woolley	
PXP Locked Encounter	MTS Clinic	7/21/2022	3	5066	Robert Woolley	The option 'Code_Tables_External_System_Name' must be configured to use the C32 external system (Id = '90020')
PXP Locked Encounter	MTS Clinic	7/21/2022	16	5066	Robert Woolley	The option 'Code_Tables_External_System_Name' must be configured to use the C32 external system (Id = '90020')
PXP Locked Encounter	MTS Clinic	7/21/2022	38	5066	Robert Woolley	The option 'Code_Tables_External_System_Name' must be configured to use the C32 external system (Id = '90020')
PXP Locked Encounter	MTS Clinic	7/21/2022	201	5065	Robert Woolley	The option 'Code_Tables_External_System_Name' must be configured to use the C32 external system

# Interface Audit

Page is designed for users to be able to build dashboards for specific interfaces such as immunization registries.

## 2: Dashboard



# Interface Audit

Page is designed to show overview of totals by specific categories. Shows percentage of failed and sent.

## 3: Interface Totals

Pages: Interfaces Overview, Dashboard, **Interface Totals**, Interface Raw Data

File Export Share Chat in Teams Get insights Subscribe Edit

Location: All Interface Name: All Message Status: All Enc. Provider: All User: All Interface Message Date: last 3 Months (7/5/2022 - 10/4/2022)

### Interface Totals

Interface	Total	Success	% Success	Failed / Error	% Failed / Error
Patient Portal Encounter CDA	42	0	0.00%	0	0.00%
PXP Locked Encounter	42	0	0.00%	20	47.62%
PxpLongitudinalCcdRequest0	4	4	100.00%	0	0.00%
PxpLongitudinalCcdRequest2	3	3	100.00%	0	0.00%
PxpLongitudinalCcdRequest3	3	3	100.00%	0	0.00%
PxpLongitudinalCcdRequest1	2	2	100.00%	0	0.00%
<b>Total</b>	<b>96</b>	<b>12</b>	<b>12.50%</b>	<b>20</b>	<b>20.83%</b>

### Location Totals

Location	Total	Success	% Success	Failed / Error	% Failed / Error
Elk River Office	4	0	0.00%	2	50.00%
Gina's Radiology	4	0	0.00%	2	50.00%
Mpls Office	10	0	0.00%	0	0.00%
MTS Clinic	60	0	0.00%	16	26.67%
MTS Main Optical	4	0	0.00%	0	0.00%
<b>Total</b>	<b>96</b>	<b>12</b>	<b>12.50%</b>	<b>20</b>	<b>20.83%</b>

### Provider Totals

Provider	Total	Success	% Success	Failed / Error	% Failed / Error
Cruise MD, Todd	8	0	0.00%	4	50.00%
Grey MD, Merideth	32	0	0.00%	8	25.00%
Jones MD, Tom K.	2	0	0.00%	1	50.00%
Mcgraw PhD, Phil	8	0	0.00%	4	50.00%
Smith MD, John	4	0	0.00%	0	0.00%
Weaver MD, Carrie	2	0	0.00%	0	0.00%
White PA, Heather	2	0	0.00%	0	0.00%
Yang MD, Christina	24	0	0.00%	3	12.50%
<b>Total</b>	<b>96</b>	<b>12</b>	<b>12.50%</b>	<b>20</b>	<b>20.83%</b>

### Created By Totals

Created By	Total	Success	% Success	Failed / Error	% Failed / Error
Kevin Lisman	22	0	0.00%	8	36.36%
NextGen Admin	62	12	19.35%	7	11.29%
Robert Woolley	12	0	0.00%	5	41.67%
<b>Total</b>	<b>96</b>	<b>12</b>	<b>12.50%</b>	<b>20</b>	<b>20.83%</b>

# Interface Audit

Page is the raw data pulled from the intrf\_queue table. Includes a column for missing home phone messages on immunization registry interfaces. Also includes drill through feature from totals page.

## 4: Interface Raw Data

Pages << File Export Share Chat in Teams Get insights Subscribe Edit ...

Interfaces Overview  
Dashboard  
Interface Totals  
**Interface Raw Data**

← Location Interface Name Message Status Enc. Provider User Interface Message Date

All All All All All 7/18/2022 10/4/2022

Interface	Location	Interface Date	MRN	Home Phone Missing (Demographics)	Encounter #	Created By	Message Missing Home Phone	Interface Details
Patient Portal Encounter CDA		9/20/2022	55	No		NextGen Admin	No	The record in patient_encounte
Patient Portal Encounter CDA	Elk River Office	7/29/2022	4	No	2	NextGen Admin	No	
Patient Portal Encounter CDA	Elk River Office	7/29/2022	334	No	2	NextGen Admin	No	
Patient Portal Encounter CDA	Gina's Radiology	7/29/2022	4	No	1	NextGen Admin	No	
Patient Portal Encounter CDA	Gina's Radiology	7/29/2022	334	No	1	NextGen Admin	No	
Patient Portal Encounter CDA	Mpls Office	9/12/2022	5	No	5087	NextGen Admin	No	
Patient Portal Encounter CDA	Mpls Office	9/12/2022	29	No	5087	NextGen Admin	No	
Patient Portal Encounter CDA	Mpls Office	9/12/2022	312	No	5083	NextGen Admin	No	
Patient Portal Encounter CDA	Mpls Office	9/19/2022	5	No	5090	NextGen Admin	No	
Patient Portal Encounter CDA	Mpls Office	9/19/2022	29	No	5090	NextGen Admin	No	
Patient Portal Encounter CDA	MTS Clinic	7/18/2022	201	No	5067	Kevin Lisman	No	
Patient Portal Encounter CDA	MTS Clinic	7/21/2022	3	No	5066	Robert Woolley	No	
Patient Portal Encounter CDA	MTS Clinic	7/21/2022	16	No	5066	Robert Woolley	No	
Patient Portal Encounter CDA	MTS Clinic	7/21/2022	38	No	5066	Robert Woolley	No	
Patient Portal Encounter CDA	MTS Clinic	7/21/2022	201	No	5065	Robert Woolley	No	
Patient Portal Encounter CDA	MTS Clinic	7/21/2022	201	No	5068	Kevin Lisman	No	
Patient Portal Encounter CDA	MTS Clinic	7/22/2022	201	No	5070	Kevin Lisman	No	
Patient Portal Encounter CDA	MTS Clinic	7/29/2022	201	No	5072	Kevin Lisman	No	
Patient Portal Encounter CDA	MTS Clinic	8/5/2022	201	No	5075	Kevin Lisman	No	
Patient Portal Encounter CDA	MTS Clinic	8/8/2022	201	No	5076	Kevin Lisman	No	
Patient Portal Encounter CDA	MTS Clinic	8/8/2022	201	No	5077	Kevin Lisman	No	
Patient Portal Encounter CDA	MTS Clinic	8/9/2022	201	No	5078	Kevin Lisman	No	
Patient Portal Encounter CDA	MTS Clinic	8/15/2022	3	No	5080	NextGen Admin	No	
Patient Portal Encounter CDA	MTS Clinic	8/15/2022	16	No	5080	NextGen Admin	No	
Patient Portal Encounter CDA	MTS Clinic	8/15/2022	38	No	5080	NextGen Admin	No	
Patient Portal Encounter CDA	MTS Clinic	8/15/2022	201	No	5079	Kevin Lisman	No	
Patient Portal Encounter CDA	MTS Clinic	8/17/2022	47	No	5081	NextGen Admin	No	
Patient Portal Encounter CDA	MTS Clinic	8/29/2022	201	No	5082	Kevin Lisman	No	
Patient Portal Encounter CDA	MTS Clinic	9/16/2022	13	No	5088	NextGen Admin	No	

## MTS Gap Analysis Report

Go To Page

Document Usage



116

# Templates User Preferred

95

# Out of Box User Preferred

21

# Customized User Preferred

18.10%

Percentage Custom Templates Preferred

151

# Templates Found

37

Template Highest Use Count

5/11/2023

Template Most Recent Used Date

145

# Out of the Box Templates

6

# Customized Templates

119

# EHR Documents Found

178

EHR Document Highest Use Count

5/8/2023

EHR Document Most Recent Used Date

1578

# EHR Sub-Documents



# Gap Analysis

## 2: Template Sets

Template sets details. Lists the templates used within template sets.

**Template Set**

All ▼

**Total Sets In Use:** 29

**# Out of the Box Templates:** 2068

**# Custom Templates:** 30

Set Name	In Use
ABIM	Yes
Advanced Template	Yes
Allergy and Immunology	Yes
BH	Yes
Cardiology	Yes
Core	Yes
Core KBM	No
Correctional Health Medicine	Yes
Dental	Yes
Derm Old	No
Dermatology	Yes
Disease Management	Yes
EDS	Yes
Endocrinology	Yes
General Surgery	Yes
GI	Yes
Nephrology	Yes
Neurology	Yes
Neurosurgery	Yes
NextMD	Yes
Old Ortho	No
Oncology	Yes
Ophthalmology	Yes
Optometry	Yes
Orthopedics	Yes
Pediatrics	Yes

In Use	Template Name	Display Name	Template Type	Out of The Box	Version Label
No	ge_test84		medical_records	No	NO VERSION FC
No	nxmd_Social_Hx_MTS		medical_records	No	V_8.4.0.94
No	ge_842_anticoag_dosing		medical_records	No	V_8.4.1.83
No	MTS_telephone_call		medical_records	No	V_8.4.1.83
No	MTS_fts_intake		medical_records	No	V_8.4.2.200
No	MTSpatientTracking		mrpopup	No	KBM 8.3.6
No	ge_compound_calc		mrpopup	No	NO VERSION FC
No	mts_office_diagnostics		mrpopup	No	V_8.4.2.61
No	MTS_Orders		practice	No	NO VERSION FC
Yes	mmic_nxmd_meds_allerg		medical_records	No	KBM 8.3.10
Yes	ge_panel_testing		medical_records	No	NO VERSION FC
Yes	ge_test		medical_records	No	NO VERSION FC
Yes	mts_test		medical_records	No	NO VERSION FC
Yes	US_1st_trim_singleton		medical_records	No	NO VERSION FC
Yes	US_1st_trim_twins_triplets		medical_records	No	NO VERSION FC
Yes	US_2nd3rd_trimester		medical_records	No	NO VERSION FC
Yes	US_GYN_Template		medical_records	No	NO VERSION FC
Yes	ge_842_anticoag_dosing		medical_records	No	V_8.4.1.83
Yes	MTS_telephone_call		medical_records	No	V_8.4.1.83
Yes	MTS_fts_intake		medical_records	No	V_8.4.2.200
Yes	GE_fts_intake		medical_records	No	V_8.4.2.88
Yes	MTSpatientTracking		mrpopup	No	KBM 8.3.6
Yes	ge_patient_providers		mrpopup	No	V_8.4.1.83
Yes	ge_pe_abdomen		mrpopup	No	V_8.4.1.83
Yes	ge_pe_breast		mrpopup	No	V_8.4.1.83
Yes	hpi_generic_free_1_mts		mrpopup	No	V_8.4.1.83

Choose template for user preferences list

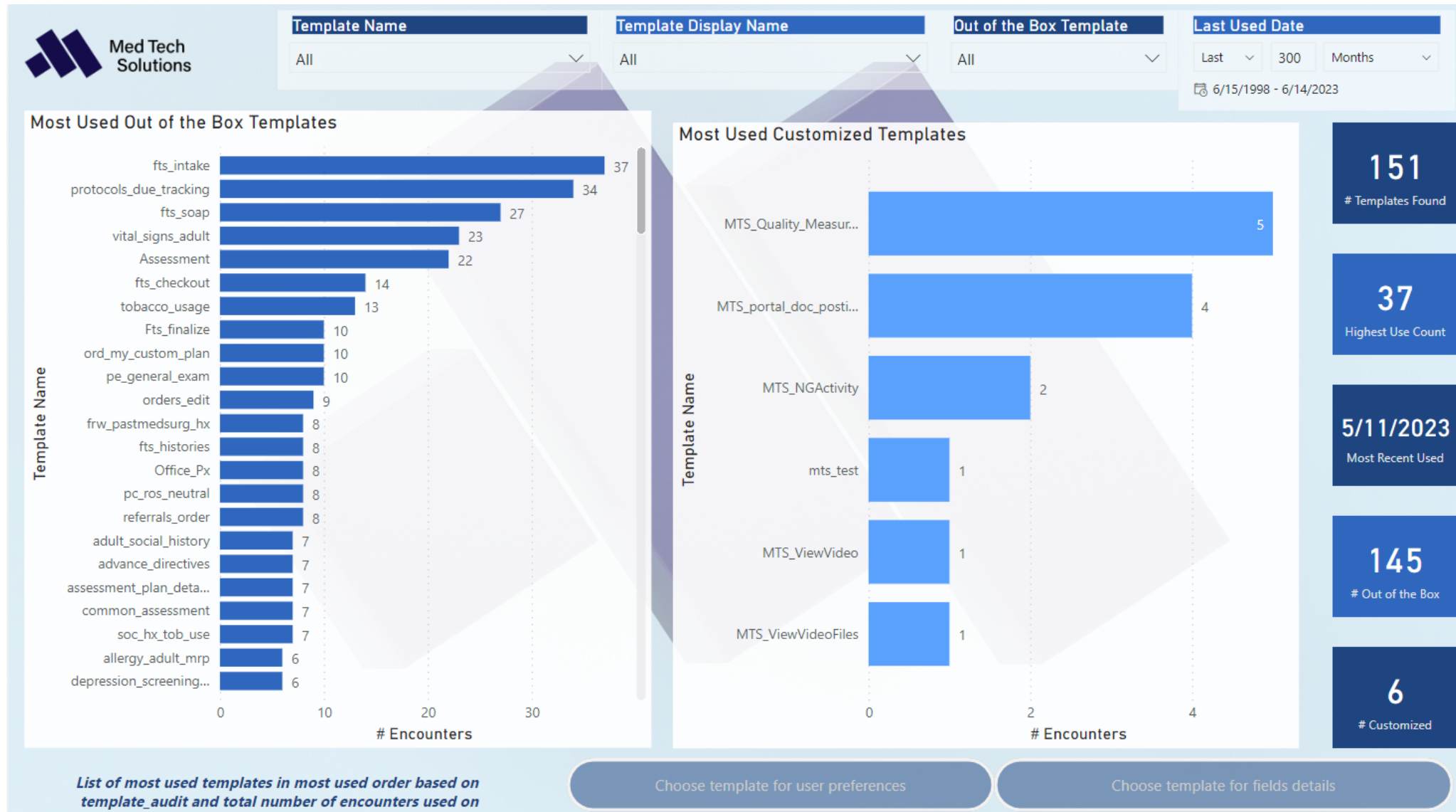
Choose template for usage details

Choose template for fields details

# Gap Analysis

## 3: Template Usage

Template usage overview page that shows the most used custom and non-customized templates.



# Gap Analysis

## 4: Template Usage Raw Data

Template usage raw details. See last used date and number of encounters templates used on.



Med Tech Solutions

Template Name

All

Display Name

All

Out of the Box Template

All

Last Used Date

Last 300 Months

6/15/1998 - 6/14/2023

Template ID	Template Name	Display Name	Out of Box	Template Type	First Used Date	Last Used Date	Version Label	# Encounters
6793	MTS_Quality_Measures_MR		N	medical_records	8/29/2022	1/9/2023		5
6804	mts_test		N	medical_records	1/11/2023	1/11/2023		1
6831	MTS_NGActivity		N	medical_records	7/12/2022	7/12/2022		2
6832	MTS_ViewVideo		N	mrpopup	8/5/2022	8/5/2022		1
6833	MTS_ViewVideoFiles		N	medical_records	8/5/2022	8/5/2022		1
6856	MTS_portal_doc_posting	MTS Electronic Document Posting	N	medical_records	10/11/2022	1/16/2023	V_8.4.0.94	4
8	Diagnostics	Diagnostic Studies	Y	mrpopup	12/13/2022	3/9/2023	KBM 8.4.5.368	4
50	Lab_Master	Lab Master	Y	mrpopup	8/5/2022	8/5/2022	KBM 8.4.5.367	1
61	Office_Px	Office Procedures	Y	mrpopup	10/7/2022	2/1/2023	KBM 8.4.5.368	8
75	telephone_call	Telephone Call	Y	medical_records	8/15/2022	8/15/2022	KBM 8.4.5.235	1
130	OB_Prenatal_Flow	Prenatal Detail - Obstetrics	Y	medical_records	8/29/2022	8/29/2022	KBM 8.4.5.447	1
145	pap_info	PAP Detail - PE	Y	mrpopup	1/27/2023	1/27/2023	KBM 8.4.5.235	1
146	pe_gu_female	Genitourinary Female - Physical Exam	Y	mrpopup	10/7/2022	2/1/2023	KBM 8.4.5.235	5
147	Urine_Dipstick	Urine Dipstick	Y	mrpopup	10/14/2022	1/16/2023	KBM 8.4.4.40	5
151	pe_abdomen	Abdomen - Physical Exam	Y	mrpopup	12/23/2022	1/16/2023	KBM 8.4.5.235	2
177	pe_respiratory	Respiratory - Physical Exam	Y	mrpopup	10/3/2022	10/3/2022	KBM 8.4.5.235	1
186	Procedures_	Procedures	Y	medical_records	10/7/2022	1/27/2023	KBM 8.4.5.351	5
191	ros_constitution	Constitutional - ROS	Y	mrpopup	10/10/2022	10/10/2022	KBM 8.4.5.234	1
192	ros_derm	Dermatologic - ROS	Y	mrpopup	2/1/2023	2/1/2023	KBM 8.4.5.234	1
200	ros_gi_diarrhea	Diarrhea - ROS	Y	mrpopup	1/27/2023	1/27/2023	KBM 8.3.6	1
210	ros_gu	Genitourinary - ROS	Y	mrpopup	8/29/2022	10/7/2022	KBM 8.4.5.234	2
211	ros_gyn	Reproductive (Female) - ROS	Y	mrpopup	8/29/2022	10/10/2022	KBM 8.4.5.235	3
213	ros_heent	HEENT - ROS	Y	mrpopup	12/13/2022	12/13/2022	KBM 8.4.5.234	1
230	ros_neu_psych	Psychiatric/Emotional - ROS	Y	mrpopup	12/13/2022	12/13/2022	KBM 8.3.6	1
235	ros_neuro	Neuro/Psychiatric - ROS	Y	mrpopup	12/13/2022	12/13/2022	KBM 8.4.5.234	1
337	doc_disab	Work/School Excuse Note	Y	mrpopup	1/27/2023	1/27/2023	KBM 8.3.0.16	1

**151**

# Templates Found

**37**

Highest Use Count

**5/11/2023**

Most Recent Used

**145**

# Out of the Box

**6**

# Customized

*List of most used templates in most used order based on template\_audit and total number of encounters used on*

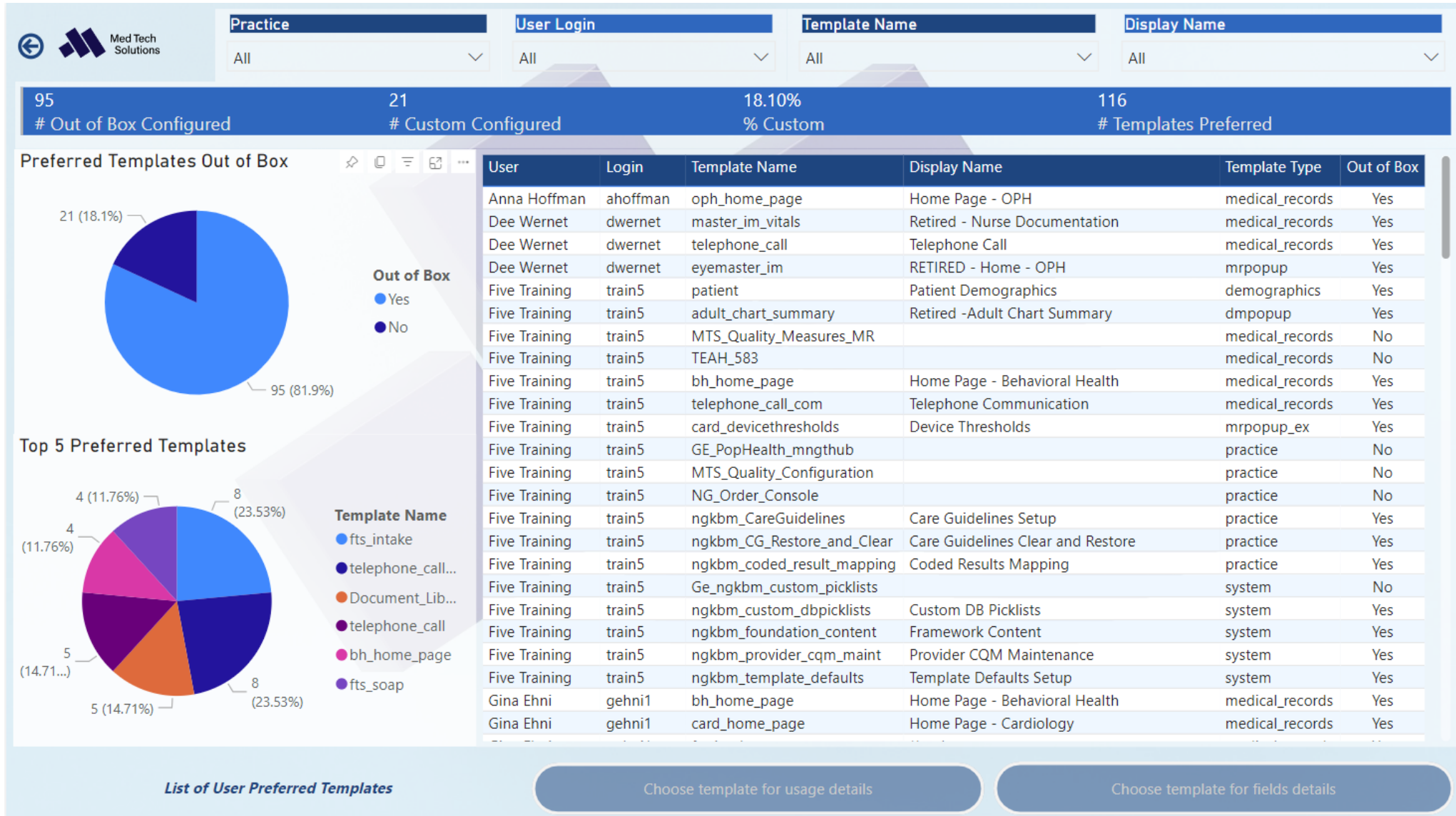
Choose template for user preferences list

Choose template for fields details

# Gap Analysis

User Preferred templates saved in individual user logins.

## 5: User Preferred Templates



# Gap Analysis

List of all custom templates with a link to view the custom fields.

## 6: Custom Templates



Template Name

All

Display Name

All

Template ID	Template Name	Display Name	Template Type	Out of Box	Version Label	# Encounters Found On	# Custom Fields	First Used Date	Last Used Date
6203	SCOTCO_sub_SUBJ_gen_HPI	General PT HPI	medical_records	No		0	238		
6829	MP_Nurse_Call		medical_records	No	KBM 7.5	1	233	6/24/2022	6/24/2022
6199	SCOTCO_sub_ASSESS_funcnl	Functional Assessment - New	medical_records	No		0	226		
6616	INF83_US_CYCLE1		medical_records	No		1	213	8/27/2018	8/27/2018
6858	MTS_Patient_merges	MTS Patient Un-Merge	practice	No	MTS Patient Merge / Un-merge	0	203		
6214	SCOTCO_sub_PLAN_goals	Goals LT ST PT	medical_records	No		0	181		
6223	SCO_TCO_PT_Codes_2016	Assessment - Therapy	mrpopup	No		0	164		
6234	nxml_PastSurgHx_2		medical_records	No	KBM 8.3.10	6	145	7/12/2016	4/3/2017
6143	nxml_PastMedHx_2		medical_records	No	KBM 8.3.6	7	145	8/25/2015	4/3/2017
6145	nxml_Allergies		medical_records	No	KBM 8.3.6	10	145	8/25/2015	2/21/2020
6144	nxml_Medications		medical_records	No	KBM 8.3.6	10	145	8/25/2015	2/21/2020
5186	Imm_Records	Immunizations Record	mrpopup	No	KBM 8.1	0	142		
6787	PVH_SR_Pop_Quality	MTS Quality Measures	medical_records	No	CSC Quality/HEDIS NG: 5.8.2	1	138	9/10/2021	9/10/2021
6635	SCFHC_SR_pop_Quality		medical_records	No		3	127	3/18/2019	4/4/2019
5624	nxml_ge_fmhx		medical_records	No	KBM 8.1	0	124		
5623	nxml_ge_test		medical_records	No	KBM 8.1	0	124		
6839	dc_betterchart_config	Better Chart - Easy Order Config	practice	No	Version 0.0.6	0	124		
6218	SCOTCO_sub_PT_daily_subj	Daily Subjective	medical_records	No		0	123		
6609	INF80_US_flowsheet	Inf Flowsheet	medical_records	No		5	120	4/3/2018	11/27/2018
6593	INF80_New_Pt_Page4	Inf Partner History	medical_records	No		5	111	3/3/2018	7/14/2021
6594	INF80_New_pt_questionnaire	Inf Gyn History	medical_records	No		5	108	3/3/2018	7/14/2021
6487	dc_easyorder_results_rvw	*HIM SafetyBot Results	practice	No	Disc Corp Results - 0.0.8	0	97		
6485	dc_easyorder_report	*HIM SafetyBot Settings	practice	No	version 0.0.7	0	93		
6201	SCOTCO_sub_ASSESS_func_rep	Functional Reporting	medical_records	No		0	92		

*List of all Custom Templates found*

Choose template for usage details

Choose template for fields details



# Gap Analysis

List of all the custom fields on custom templates.

## 7: Custom Fields on Custom Templates

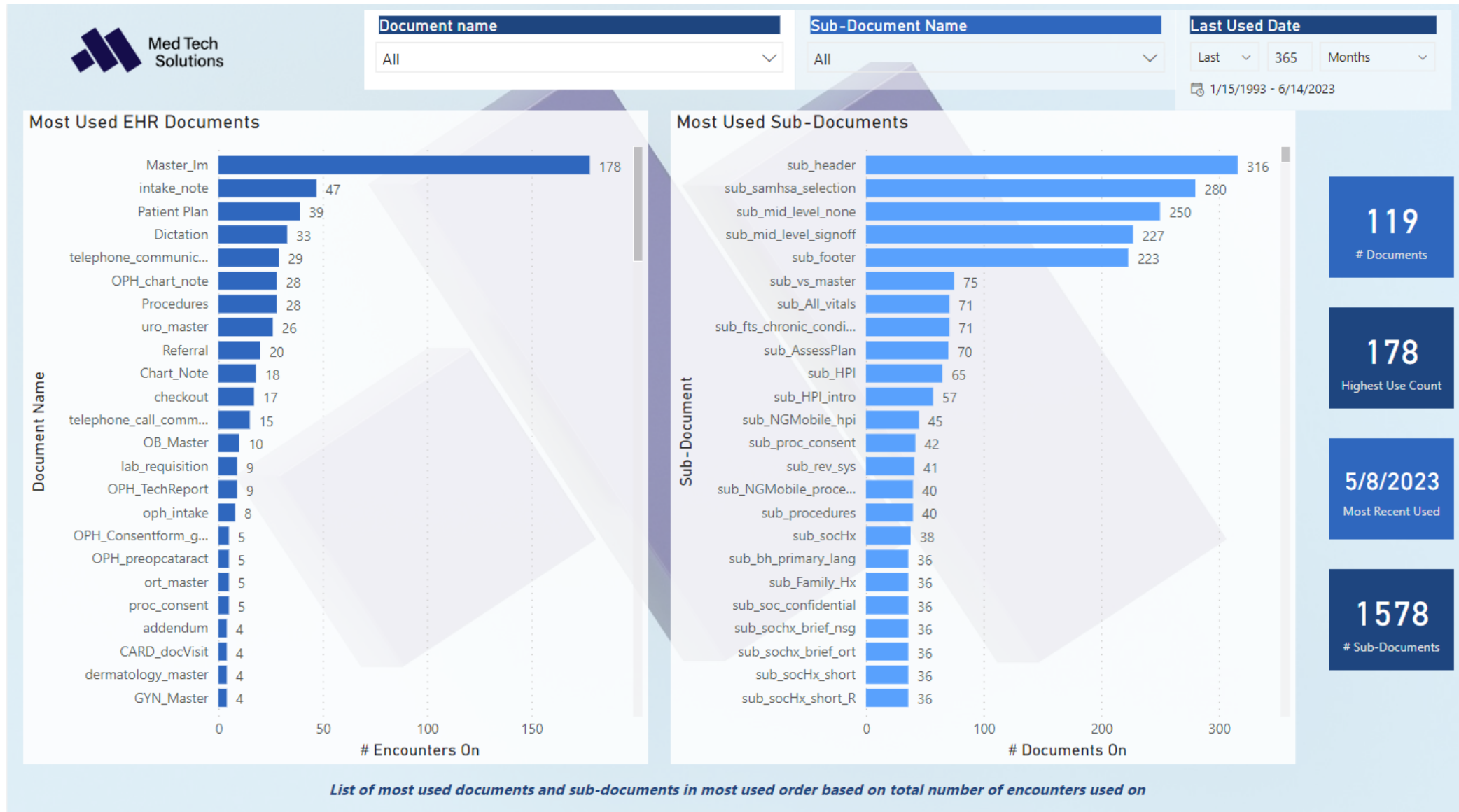
Current Selected Template: Select a Template		6108	2644	1176	349	880	4			
		# Custom Fields	# Hidden Fields	# Checkbox Fields	# Active Text Fields	# Radio Button Fields	# Note Fields			
Template Name	DB Table	Field Name	Field Type	Data Type	Length	Default Value	Hidden	Created By	Create Date	Comment
acra_091813_popup	acra_091813_popup_	chk_allergy_1	CheckBox	Numeric	0	Bee Sting	No	NextGen Admin	9/18/2013	
acra_091813_popup	acra_091813_popup_	chk_allergy_2	CheckBox	Numeric	0	Sulfac	No	NextGen Admin	9/18/2013	
acra_091813_popup	acra_091813_popup_	chk_allergy_3	CheckBox	Numeric	0	Penicillin	No	NextGen Admin	9/18/2013	
acra_091813_popup	acra_091813_popup_	chk_allergy_4	CheckBox	Numeric	0	Latex	No	NextGen Admin	9/18/2013	
acra_091813_popup	acra_091813_popup_	txt_reaction_1		Text	100		No	NextGen Admin	9/18/2013	
acra_091813_popup	acra_091813_popup_	txt_reaction_2		Text	100		No	NextGen Admin	9/18/2013	
acra_091813_popup	acra_091813_popup_	txt_reaction_3		Text	100		No	NextGen Admin	9/18/2013	
acra_091813_popup	acra_091813_popup_	txt_reaction_4		Text	100		No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	act_tab2	HyperText	Text	10		No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	chk_exam_1	CheckBox	Numeric	0	Swelling	No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	chk_exam_2	CheckBox	Numeric	0	Redness	No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	chk_exam_3	CheckBox	Numeric	0	Fever	No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	chk_exam_4	CheckBox	Numeric	0	Tenderness	No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	opt_allergies_updated	RadioButton	Text	10	Reviewed	No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	opt_allergies_updated	RadioButton	Text	10	Updated	No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	txt_activities		Text	50		No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	txt_activities_summary		Text	1000		No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	txt_age		Time	32		Yes	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	txt_date_reviewed		Text	15		No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	txt_date_updated		Date	10		No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	txt_dx_code		Text	15		No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	txt_dx_description		Text	100		No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	txt_dx_status		Text	50		No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	txt_exam_summary		Text	1000		No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	txt_insurance		Text	50		No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	txt_pcp_address		Text	50		No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	txt_pcp_city		Text	25		No	NextGen Admin	9/18/2013	
acra_TE091713_Tab1	acra_TE091713_Tab1_	txt_pcp_fname		Text	75		No	NextGen Admin	9/18/2013	

*All custom fields on custom template selected. Includes overall custom field totals.*

# Gap Analysis

## 8: Documents Usage


Most used documents overview.



# Gap Analysis

## 9: Document Usage

Most used documents list for documents and sub-documents used.



Document Name: All | Sub-Document Name: All | Last Used Date: Last 365 Months | 1/15/1993 - 6/14/2023

Document Name	Last Used Date	# Encounters
Master_Im	5/8/2023	178
intake_note	4/4/2023	47
Patient Plan	4/4/2023	39
Dictation	10/11/2022	33
telephone_communication	3/8/2022	29
OPH_chart_note	9/8/2022	28
Procedures	1/27/2023	28
uro_master	12/12/2022	26
Referral	1/27/2023	20
Chart_Note	7/11/2017	18
checkout	1/27/2023	17
telephone_call_communication	11/30/2022	15
OB_Master	9/15/2020	10
lab_requisition	3/9/2023	9
OPH_TechReport	5/7/2022	9
oph_intake	4/21/2022	8
OPH_Consentform_generated	5/7/2022	5
OPH_preopcataract	5/2/2022	5
ort_master	10/28/2019	5
proc_consent	2/1/2023	5
addendum	10/24/2022	4
CARD_docVisit	5/21/2020	4
dermatology_master	12/5/2017	4
GYN_Master	4/14/2020	4
OPH_historyandphysical	5/2/2022	4
OPH_Topo_Interp	5/9/2022	4
CARD_docPatientTicket	1/5/2015	3
ni_master	12/13/2022	3

Document Name	# Documents On	# Encounters
sub_header	316	1818
sub_samhsa_selection	280	160
sub_mid_level_none	250	1770
sub_mid_level_signoff	227	353
sub_footer	223	1689
sub_vs_master	75	1460
sub_All_vitals	71	1439
sub_fts_chronic_conditions_hpi	71	1495
sub_AssessPlan	70	22
sub_HPI	65	1506
sub_HPI_intro	57	1471
sub_NGMobile_hpi	45	104
sub_proc_consent	42	1413
sub_rev_sys	41	1499
sub_NGMobile_procedure	40	1385
sub_procedures	40	1385
sub_socHx	38	1431
sub_bh_primary_lang	36	1385
sub_Family_Hx	36	1444
sub_soc_confidential	36	1442
sub_socHx_brief_nsg	36	1385
sub_socHx_brief_ort	36	1385
sub_socHx_short	36	1385
sub_socHx_short_R	36	1385
sub_pcp_Name	35	154
sub_histories_short	34	1383
sub_no_relev_fhx	33	1387
sub_advance_directives	32	1442

*List of most used documents and sub-documents in most used order based on total number of encounters used on*

# Security Group Permissions

Operations security group permissions.

## 1: Overview of Operations



Practice

Security Group

Operation Sub-Type

Deactivated User

### Permissions (Operations)

Practice	Security Group	Type	Sub-Type	Sub-Type Item	Access (Yes/No)
MTS Clinic	5.8UD3 Testers >	Operation			Yes
MTS GE Practice	5.8UD3 Testers >	Operation			Yes
MTS Clinic	5.9.2 Testers	Operation			Yes
MTS GE Practice	5.9.2 Testers	Operation			Yes
Health IT	Administrator	Operation			Yes
Ambulatory Surgery Center	Administrators	Operation			Yes
MTS Clinic	Administrators	Operation			Yes
MTS GE Clinic	Administrators	Operation			Yes
MTS GE Practice	Administrators	Operation			Yes
Plymouth Providers	Administrators	Operation			Yes
Ambulatory Surgery Center	App Support	Operation			Yes

### Security Group Members

Practice	Group	User	Login ID	User ID	Deactivated User
MTS Clinic	5.8UD3 Testers >	Bertha Beta	berthabeta	44	No
MTS Clinic	5.8UD3 Testers >	Carol Helminen	chelminen	25	No
MTS Clinic	5.9.2 Testers	Fay Flower	fflower22	53	No
MTS Clinic	5.9.2 Testers	Michael Manley	mmanley22	52	No
MTS Clinic	5.9.2 Testers	Timothy Toddler	ttoddler22	54	No
Health IT	Administrator	Catherine Figueroa	cfigueroa	75	No
Health IT	Administrator	Dean Stoker	dstoker	73	No
Health IT	Administrator	Jason Peterson	jpeterson	72	No
Health IT	Administrator	Julie Klatt	bojklk24	24	No
Health IT	Administrator	Kathy Zwach	kathyzwach	17	No
Health IT	Administrator	Lowell Lazaga	mtslazaga	47	No

System Admin Permissions Report - Operations List of Sub-Types users have access to in NextGen

# Security Group Permissions

Modules security group permissions.

## 2: Overview of Modules



Practice:  Sub-Type:  Security Group:  Deactivated User:

### Permissions (Modules)

Practice	Security Group	Type	Sub-Type	Sub-Type Item	View	Update	Add	Print	Delete
MTS -Clinic	5.8UD3 Testers >	Module			Yes	Yes	Yes	Yes	Yes
MTS -GE Practice	5.8UD3 Testers >	Module			Yes	Yes	Yes	Yes	Yes
MTS -Clinic	5.8UD3 Testers >	Module	Background Business Processor		Yes	Yes	Yes	Yes	Yes
MTS -GE Practice	5.8UD3 Testers >	Module	Background Business Processor		Yes	Yes	Yes	Yes	Yes
MTS -Clinic	5.8UD3 Testers >	Module	Background Business Processor	Jobs	Yes	Yes	Yes	Yes	Yes
MTS -GE Practice	5.8UD3 Testers >	Module	Background Business Processor	Jobs	Yes	Yes	Yes	Yes	Yes
MTS -Clinic	5.8UD3 Testers >	Module	Background Business Processor	Packages	Yes	Yes	Yes	Yes	Yes
MTS -GE Practice	5.8UD3 Testers >	Module	Background Business Processor	Packages	Yes	Yes	Yes	Yes	Yes
MTS -Clinic	5.8UD3 Testers >	Module	Background Business Processor	Schedules	Yes	Yes	Yes	Yes	Yes
MTS -GE Practice	5.8UD3 Testers >	Module	Background Business Processor	Schedules	Yes	Yes	Yes	Yes	Yes
MTS -Clinic	5.8UD3 Testers >	Module	Case Management		Yes	Yes	Yes	Yes	Yes

### Security Group Members

Practice	Group	User	Login ID	User ID	Deactivated User
Ambulatory Surgery Center	Service Accounts		Pat_00001_0003	-3148	No
Dee Vega Enterprises	Service Accounts		Pat_00001_0005	-3150	No
Health IT	Service Accounts		Pat_00001_0004	-3149	No
MTS -Clinic	Service Accounts		Pat_00001_0001	-3146	No
MTS -GE Clinic	Service Accounts		Pat_00001_0006	-3151	No
Plymouth Providers	Service Accounts		Pat_00001_0002	-3147	No
Robert Clinic	Service Accounts		Pat_00001_0008	-3152	No
MTS -Clinic	Administrators	Admin Admin	AdminCP	42	No
Ambulatory Surgery Center	Administrators	Amanda Training	atraining	23	No
MTS -Clinic	Administrators	Amanda Training	atraining	23	No
Plymouth Providers	Administrators	Amanda Training	atraining	23	No

System Admin Permissions Report - Modules List of Sub-Types and Items users have access to in NextGen and what level of permission



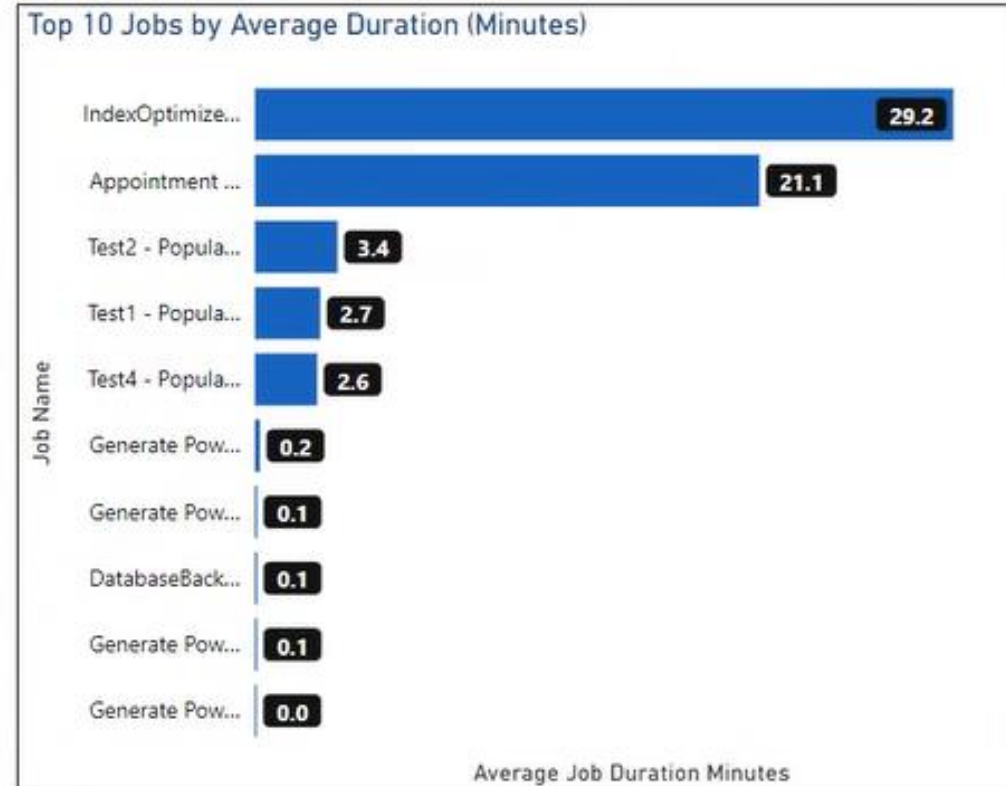




## SQL Server Agent Job History: Job Level

<b>MTSMN16SQL01</b> <b>Agent Server</b>		From 2/28/2024 to 3/13/2024 <b>Run Date Interval</b>		<b>Job Duration Performance (Minutes)</b>		<b>Date</b> 2/28/2024 3/13/2024		<b>Job Name</b> All	
<b>387</b> Jobs Executed		<b>363</b> Jobs Succeeded		<b>24</b> Jobs Failed		1.6 Avg Job Duration		29.2 Max Job Duration	
				0.0 Min Job Duration		0.0 Median Job Duration		<b>Run Status</b> All	

Job Name	Run Date	Run Status	Job Duration (Mins)
IndexOptimize - USER_DATABASES	3/9/2024 1:00:00 AM	Succeeded	29.2
Appointment Slot Backup For Reporting -excluded-	3/9/2024 4:00:00 PM	Failed	22.6
Appointment Slot Backup For Reporting -excluded-	3/8/2024 4:00:00 PM	Failed	22.4
Appointment Slot Backup For Reporting -excluded-	3/9/2024 8:00:00 AM	Failed	22.3
Appointment Slot Backup For Reporting -excluded-	3/6/2024 12:00:00 PM	Failed	22.2
Appointment Slot Backup For Reporting -excluded-	3/4/2024 12:00:00 PM	Failed	21.7
Appointment Slot Backup For Reporting -excluded-	3/9/2024 12:00:00 PM	Failed	21.6
Appointment Slot Backup For Reporting -excluded-	3/7/2024 8:00:00 AM	Failed	21.6
Appointment Slot Backup For Reporting -excluded-	3/7/2024 12:00:00 PM	Failed	21.5
Appointment Slot Backup For Reporting -excluded-	3/8/2024 12:00:00 PM	Failed	21.4
Appointment Slot Backup For Reporting -excluded-	3/7/2024 4:00:00 PM	Failed	21.1





## SQL Server Agent Job History: Job Step Level

MTSMN16SQL01  
Agent Server

From 3/19/2024 to 4/17/2024  
Run Date Interval

**554**  
Steps Succeeded

**29**  
Steps Failed

**0**  
Steps Retried

**Job Step Duration Performance (Minutes)**

1.3  
Average Step Duration

31.3  
Max Step Duration

0.0  
Min Step Duration

0.0  
Median Step Duration

**Date**

3/19/2024 4/17/2024

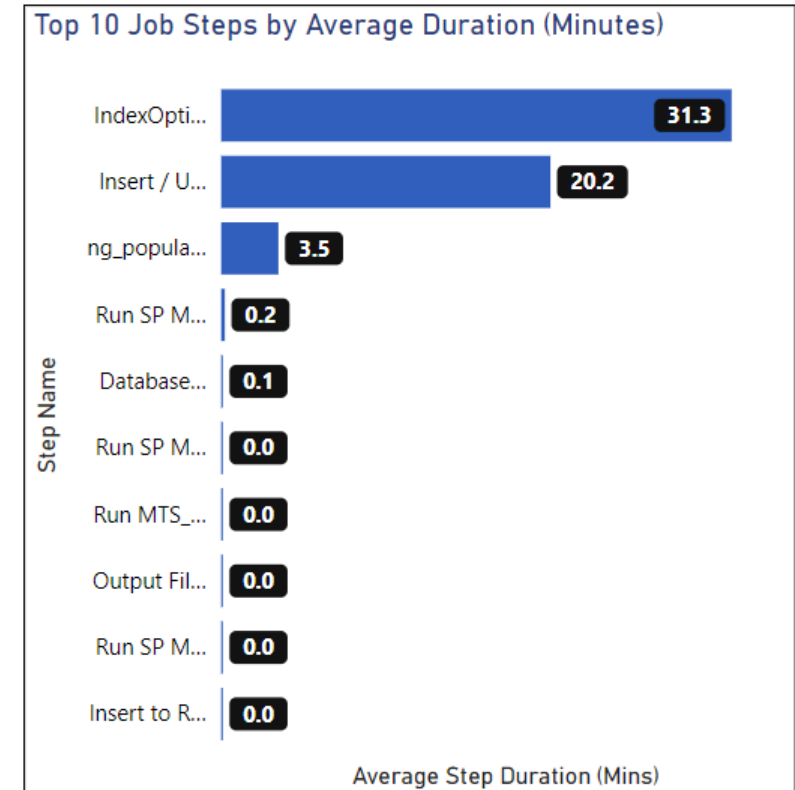
**Job Name**

All

**Run Status**

All

Job Name	Step Name	Run Date	Run Sta
Appointment Slot Backup For Reporting -excluded-	Insert to Report DB	4/17/2024 12:19:29 PM	Failed
Appointment Slot Backup For Reporting -excluded-	Insert / Update Slot Data	4/17/2024 12:00:00 PM	Succeed
Appointment Slot Backup For Reporting -excluded-	Insert to Report DB	4/17/2024 8:19:41 AM	Failed
Appointment Slot Backup For Reporting -excluded-	Insert / Update Slot Data	4/17/2024 8:00:00 AM	Succeed
Test2 - Populate Search Tables	exec ng_create_usertopdiag	4/17/2024 5:05:03 AM	Succeed
Test1 - Populate Search Tables	exec ng_create_usertopdiag	4/17/2024 5:03:44 AM	Succeed
Test4 - Populate Search Tables	exec ng_create_usertopdiag	4/17/2024 5:03:43 AM	Succeed
Test1 - Populate Search Tables	ng_populate_search_tables	4/17/2024 5:00:00 AM	Succeed
Test2 - Populate Search Tables	ng_populate_search_tables	4/17/2024 5:00:00 AM	Succeed
Test4 - Populate Search Tables	ng_populate_search_tables	4/17/2024 5:00:00 AM	Succeed
Generate Power Bi ME Snapshot Data	Run MTS_Powerbi_ME_Comp_complete_ar_6mos	4/17/2024 4:45:03 AM	Succeed
Generate Power Bi ME Snapshot Data	Run MTS_Powerbi_ME_Comp_complete_ar_6mos_no baddebt	4/17/2024 4:45:03 AM	Succeed
Generate Power Bi ME Snapshot Data	Run MTS_Powerbi_ME_Comp_total_chq_by_fin_class	4/17/2024 4:45:03 AM	Succeed





## SQL Server Agent Job History: Job Step Level

MTSMN16SQL01  
Agent Server

From 3/19/2024 to 4/17/2024  
Run Date Interval

**554**  
Steps Succeeded

**29**  
Steps Failed

**0**  
Steps Retried

**Job Step Duration Performance (Minutes)**

1.3  
Average Step Duration

31.3  
Max Step Duration

0.0  
Min Step Duration

0.0  
Median Step Duration

**Date**

3/19/2024 4/17/2024

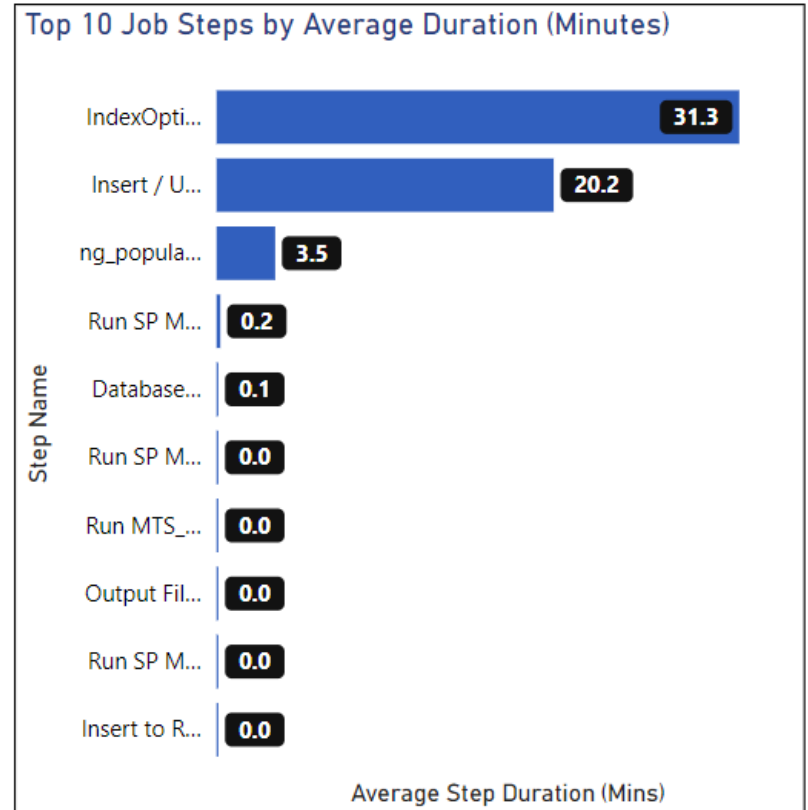
**Job Name**

All

**Run Status**

All

Job Name	Step Name	Run Date	Run Sta
Appointment Slot Backup For Reporting -excluded-	Insert to Report DB	4/17/2024 12:19:29 PM	Failed
Appointment Slot Backup For Reporting -excluded-	Insert / Update Slot Data	4/17/2024 12:00:00 PM	Succeed
Appointment Slot Backup For Reporting -excluded-	Insert to Report DB	4/17/2024 8:19:41 AM	Failed
Appointment Slot Backup For Reporting -excluded-	Insert / Update Slot Data	4/17/2024 8:00:00 AM	Succeed
Test2 - Populate Search Tables	exec ng_create_usertopdiag	4/17/2024 5:05:03 AM	Succeed
Test1 - Populate Search Tables	exec ng_create_usertopdiag	4/17/2024 5:03:44 AM	Succeed
Test4 - Populate Search Tables	exec ng_create_usertopdiag	4/17/2024 5:03:43 AM	Succeed
Test1 - Populate Search Tables	ng_populate_search_tables	4/17/2024 5:00:00 AM	Succeed
Test2 - Populate Search Tables	ng_populate_search_tables	4/17/2024 5:00:00 AM	Succeed
Test4 - Populate Search Tables	ng_populate_search_tables	4/17/2024 5:00:00 AM	Succeed
Generate Power Bi ME Snapshot Data	Run MTS_Powerbi_ME_Comp_complete_ar_6mos	4/17/2024 4:45:03 AM	Succeed
Generate Power Bi ME Snapshot Data	Run MTS_Powerbi_ME_Comp_complete_ar_6mos_no baddebt	4/17/2024 4:45:03 AM	Succeed
Generate Power Bi ME Snapshot Data	Run MTS_Powerbi_ME_Comp_total_chq_by_fin_class	4/17/2024 4:45:03 AM	Succeed





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