Recommended eyeReports to use by Position

Contents

On the Desktop Organize Reports

Suggested ways to organize the eyeReports on your computer Desktop

By function in separate folders under the eyeReports to xx\xx\xxxx folder

Name	Size	Type	Date Modified
Documents		File Folder	06/12/2014 1:54 PM
Masters		File Folder	08/06/2014 5:54 PM
Recall		File Folder	09/26/2014 2:22 PM
Appointment		File Folder	09/26/2014 2:22 PM
Production		File Folder	09/26/2014 2:22 PM
Collections		File Folder	09/26/2014 2:22 PM

Front desk

360 – Appointment Schedule	• Know who is scheduled and why • Have quick access to patient contact information & financial status • Review meaningful Use fields are populated like Communication Preference, Race, Gender, and Preferred Language. Ethnicity • Know who accepts Text messages
16 – Patient Demographic Information Verification Form	Select a patient and print a single sheet which prints the current demographic information in OfficeMate. The patient can then make additions and corrections on the sheet and give back to staff to update.

Providers during Exam

900 – ExamWRITER Patient IOP, Pachmetry, Rx History	Previously #'s 900 and 910 After selecting a patient name, the reports shows: • A graphical comparison of IOP's over time • Pachmetry history • Rx History Open exams are also listed to find exams that still need to be closed or billed.
920 – Meaningful Use Exam Fields	Review that all meaningful use fields are being completed in the patient exam record.
930 – Analyze exams without fee slips and review recall meaningful use fields	• Analyze the # of exams that created lab orders and then ultimately became charges. • Be sure meaningful Use Fields are being completed through ExamWRITER • Be sure the patient recall date is being updated in ExamWRITER • Know exam open charges
1040 – Exam ExamWRITER exam and lab order charges and redo orders	Know the charges that are still open for exam charges and lab orders that have been created and invoiced but never Posted.

Office Manager/Bookkeeper

Daily

460 – Day Sheets & Patient Receipts - **<u>Based on OfficeMate Posting Date</u>**	This report lists all day's details during a period. OfficeMate presents a single day sheet, this presents a single day plus many more with additional details of transactions during the day. • Review the details of fee slips recorded. • Know payments by payment types • Know adjustments and returns made during the day • Know amount and % of collections made to patient responsibility to stay on top of receivables • Use to help with the deposit ticket to know the break out of collection types NOTE: This shows only applied payments for fee slips created. It does not include applied payments on prior receivables.
470 – Insurance Payments Received - **<u>Based on OfficeMate Posting Date</u>**	This report lists the insurance payments received by payment types. Use in conjunction with the OfficeMate deposit Ticket to know more details about the payments. NOTE: This shows only applied payments for fee slips created. It does not include applied payments on receivables.
450 – Fee Slip Listing with Line Item Providers and Staff	This report lists the details of each fee slip recorded during the period. Each line item, if the provider or staff is to be credited for the sale, should have the staff name and provider name assigned. Use this report to: • Be sure all provider names, staff names and insurance companies are assigned correctly • Be sure the Dates of Service are correct • Know the costs of the products sold by Providers.

360 – Appointment Schedule	Be sure all appointments that were kept had a fee slip recorded. Review meaningful Use fields are populated like Communication Preference, Race, Gender, and Preferred Language. Ethnicity
175 – Daily Sales and Patient Collections at time of visit with comparisons of Providers and Staff and Recorded By	This report details by days the sales by Production Groups or product names on fee slips and compares the Net Fees and patient responsibility to the actual amount collected from the patient. • Review details of fee slips recorded for Net Fees vs. Patient Responsibility. • Know how many new patients are added during the period • Know what % staff is collecting from patients at time of visit • Compare daily sales by days • Compare daily sales by Providers • Compare daily sales by staff • Compare staff % collected from patients at time of visit • Compare Recorded By collected from patients at time of visit • Compare % collected from patients at time of visit by Months • Know patient payment methods and the details that makeup the payments
360 – Appointment Schedule	Be sure the demographic meaningful use fields are being entered.
Periodically	
30 – Recall Date Listing	Be sure patient recall dates are after their last exam date – know that staff is updating the recall dates and they are not getting left in the past. This report lists: • all patients whose recall date is less than their last exam date • all patients and their recall dates
35 – Patient Referred Out Status report	Use this report only if you refer patients out to other providers and maintain the dates they are expected to return using the Patient referrals to other provider's process on the patient Exams tab in both ExamWRITER and OfficeMate. This report helps you find: • Patients who have not returned based on their expected return date • Patients that need follow-up care or to be contacted to find out how they are
440 – Deposit & Applied Payment Adjustments	Payments that have been applied can be deleted. Payments that have been recorded can be reversed or corrected. This report shows the payment deletions, corrections and reversals and who is making those changes. • Know the payment reversals and corrections made and why they were made by recorded by • Know the deleted payments that were previously applied.
450 – Fee Slip Listing with Line Item Providers and Staff	This report lists the details of each fee slip recorded during the period. Each line item, if the provider or staff is to be credited for the sale, should have the staff name and provider name assigned. Use this report to: • Be sure all provider names and staff names are assigned correctly • Review the fee slip details to be sure the insurance is assigned correctly. Compare the insurance indicated when the appointment was made to the insurance assigned on the fee slip. • Know the costs by providers of the products sold
465 – Percent of Patient Payments Collected by Staff at Time of Visit - Based on OfficeMate Posting Date	This report details by months and Recorded By the per cents collected by them at the patient time of visit. Review this report to see what staff members are collecting a lower per cent to know if additional training is needed to increase cash flows. Compare collection %'s by: • Recorded By • By Locations
480 – Discounts Given to Patients	This report details the discounts given to analyze what discounts and how much of discounts are being given by staff. Review by: • Discount Type • Dates and amounts given
490 – Adjustment to the Patient Ledger	This report lists all adjustments types with the patient details of adjustments made to the patient financial ledger. • Know what amount of adjustments are made by adjustment type and to which patients • Select the adjustment type and see which patients are getting the adjustments • Know what write-offs & adjustments are being made to patient financial records by months. • Compare adjustment types made by locations • Compare and review for any that should not be made by Recorded By names
451- Medicaid\Medicare HER Incentive research	Request this report and use it to get the Medicaid or Medicare encounters to the total to submit for your EHR incentives.
810 – Journal Entries	This report gives you the journal entries you need to manually enter into your accounting system. After you setup OfficeMate to interface with MAS90/200, journal entries will then be created.

Dispensers	
600 – Frame and Lens lab Order Tracking	This report details the frame and lens lab orders that are created during a selected period. Know what frames and lenses are selling and to whom. Also use this report to track the lab orders to know and act upon: • Orders created but not invoiced on a fee slip • Charged on a fee slip but not recorded • Ordered but not received • Received but the patient has not been notified for dispense • Patient notified but not dispensed • Find lab orders based on promised dates All details to contact patients are included for easy notification
610 – Soft Lens Order Tracking	Same as 600 except for Soft Contact Lens Orders
620 – Rigid Lens Order Tracking	Same as 600 except for Rigid Contact Lens Orders
155 DS – Sales by Dispenser (same as 155C except it is based on Net Fees)	• Calculate staff net fees generated per hour and gross profit generated per hour • Know products sold by staff comparison with gross profits generated • Compare staff sales by products or product types • Compare staff units sold by product or product types • Compare staff sales by products by months of the year • Compare staff units sold by products by months of the year • Know by staff name who is promoting second pair sales • Know who is up-selling and compare • Compare staff sales by insurance companies

145 – Contact lenses Sold to Patients	• Know which patients are buying which lenses.
	• Get patients email addresses and phone numbers and age
	• Know contact lens gross profits.
	• Select patients by the lenses they are wearing.
	• Graph net fees by contact lens names to quickly see fees by each
	• Know gross profits by Contact Lens Names and filter:
	    o By Manufacturer
	    o By Insurance
	    o By Provider
	    o By Staff Name
	    o By Series

Owner, PM Consultant, Managers	
5 – Insurance Company Analysis	• Compare insurance companies collected and uncollected amounts • Analyze whether to keep accepting the company based on uncollected and sales made • Know key performance indicators of private pay vs. insurance fees • Know insurance past due balances from prior years that need to be collected • Know gross profits of frames by insurance carriers. Know which ones to sell based on insurance so losses are not incurred – by Net Fees and Collected

360 – Appointment Schedule	• Review scheduled appointment statistics to know scheduling effectiveness related o the # of:
	    o Shows vs. No Shows to # scheduled
	    o Cancelled vs. scheduled
	    o # of bookings to available times
	    o Pre-appointments that cancelled – how effective is pre-appointing
	    o Patients scheduling with insurance - # cancelled to show
	    o Review meaningful Use fields are populated like Communication Preference, Race, Gender, Preferred Language. Ethnicity

Based on Net Fees	•

110 – Monthly Sales by Financial & Production Groups	• Know Net Fees and Units generated by Financial and Production Groups
	    o By Months compared
	    o By Insurance Company
	    o By Providers
	    o By the months % of sales
	    o By Product names by selecting a product name

	• Know discounts given during the period
115 – Monthly Fees by CPT Codes Months Compared	Know Net Fees and units generated by CPT Codes • By Months compared – compare 2 years • By Insurance Company • By Providers • By the months % of sales If you pay providers by RVUs' this report details the RVU's when you use the Wholesale cost as the RVU value.
111 – 2011 vs. 2012 Production Groups and CPT Codes Compared <u>by Collections and Net Fees</u>	• Know the increase or decrease in net fees, units and collections from 2011 to 2012 by: o CPT Codes o Production Groups • Compare Provider Net Fees by Production Groups
155 DS – Sales by Dispenser (same as 155C except it is based on Net Fees)	• Calculate staff net fees generated per hour and gross profit generated per hour • Know products sold by staff comparison with gross profits generated • Compare staff sales by products or product types • Compare staff units sold by product or product types • Compare staff sales by products by months of the year • Compare staff units sold by products by months of the year • Know by staff name who is promoting second pair sales • Know who is up-selling and compare • Compare staff sales by insurance companies
Based on Collections Applied	
650 – Applied Payments by Production, Financial, CPT and Diagnosis Codes	This report is the same as 110 and 115 except it is based on collections. It details actual payments applied by: • Production Groups by months compared • Production Groups by Providers compared • Production Groups by Insurance companies • CPT Codes by months compared • CPT Codes by Providers compared • CPT Codes by Insurance companies compared • Primary Diagnosis Codes by months compared • Primary Diagnosis Codes by Providers compared • Primary Diagnosis Codes by Insurance companies compared • Financial Groups by months compared • CPT Codes by Locations compared
655 – Graphs of Applied Payments by Production, Financial, CPT and Diagnosis Codes	This report details 650 by a graphical presentation after selecting the Date of Service period: • Production Groups compared • Providers compared • Collections by months compared • CPT Codes compared • Primary Diagnosis Codes compared • Financial Groups compared • CPT Codes by Locations compared • Primary Diagnosis Codes by Locations compared
155 C – Amounts Collected on Dispenser/Staff sales (same as 155DS except based on collections)	• Calculate staff net fees generated per hour and gross profit generated per hour • Know products sold by staff comparison with gross profits generated • Compare staff sales by products or product types • Compare staff units sold by product or product types • Compare staff sales by products by months of the year • Compare staff units sold by products by months of the year • Know by staff name who is promoting second pair sales • Know who is up-selling and compare • Compare staff sales by insurance companies
Metrics and Key Product Indicators	•
Based on Net Fees	•
0 PM – Practice Metrics & Product Sales by Net Fees	• Analyze practice metrics per comprehensive exam and refractions based on Net Fees • Review net fees by CPT Codes and Products by Net Fees, Units and % of sales • Know metrics by staff and provider hours worked
0 PS – Product Sales and Graphs Key	• View by graphs the product sales.

Performance Indicators by Net Fees	• View by graphs sales by designers • View by graphs units sold
Based on collections	
1 – Practice Metrics based on Collections (same as 0PM, except based on collections)	• Analyze practice metrics per comprehensive exam and refractions based on Net Fees • Review net fees by CPT Codes and Products by Net Fees, Units and % of sales • Know metrics by staff and provider hours worked
2 – Graphs of Practice Metrics based on Collections	• Compare practice metrics and key performance indicators by years from 2008 to the present. • Check if trends are back to 2008 or better levels. • See if you are performing better than the prior year • Know what new patients are contributing and are you adding new patients.
3 – eyeFocus Practice Metrics	With a few clicks compare basic practice metrics between periods and see them graphed.
4 – Get your metrics for your PM consultants	Get many metrics and use to give to your practice management consultants or create your own dashboard of metrics.
Gross Profits in Reports	**These reports have Gross Profits indicated for products**
Based on Net Fees	
145 – Contact Lens Sales by patients	Gross profits by contact lenses
5 – Insurance Analysis	Gross profits after net fees less write-offs and costs by frames sold to patients
510 – Frame Sales & Board Locations	Gross profits by frames sold with board locations
155 DS – Net Fees on Dispenser/Staff sales	Gross profits by product types based on net fees and gross profit per hour
Based on Collections	
5 – Insurance Analysis	• Gross profits after collections less write-offs and costs by frames sold to patients. • Know by CPT codes what actual collections are.
155 C – Amounts Collected on Dispenser/Staff sales (same as 155DS except based on collections)	Gross profits by product types based on collections and gross profit per hour
Compare 2+ Locations Results	
176 – Graphs of Locations Sales, Collections and % Collected	Using graphs for visual comparison of location results for: • Net fees by location • Patient Fees & Co-pays generated • Discounts given by location • % collected from patients at the time of visit • Amount collected from patients at the time of visit • Patient Receipts by payment types compared
465 – Percent of Patient Payments Collected by Staff at Time of Visit	This report details by months and Recorded By the per cents collected by them at the patient time of visit. Review this report to see what staff members are collecting a lower per cent to know if additional training is needed to increase cash flows. Compare collection %'s by: • Recorded By • By Locations
490 – Adjustment to the Patient Ledger	This report lists all adjustments types with the patient details of adjustments made to the patient financial ledger. • Know what amount of adjustments are made by adjustment type and to which patients • Select the adjustment type and see which patients are getting the adjustments • Know what write-offs & adjustments are being made to patient financial records by months. • Compare adjustment types made by locations • Compare and review for any that should not be made by Recorded By names
Based on Collections	
650 – Applied Payments by Production, Financial, CPT and Diagnosis Codes	This report is the same as 110 and 115 except it is based on collections. It details actual payments applied by: • CPT Codes by Locations compared
655 – Graphs of Applied Payments by Production, Financial, CPT and Diagnosis Codes	This report details 650 by a graphical presentation after selecting the Date of Service period: • CPT Codes by Locations compared • Primary Diagnosis Codes by Locations compared
Consultant or Affiliate Reports	**These are reports specifically created for practice management consultants or affiliate groups.**
1000 – ODExcellence Profit worksheet	This report quickly gathers the data you need to enter on the ODx web site Profit center.
1010 – Cleinman Performance Partners Data Gathering for the Operations Report	This report quickly gathers the data you need to enter on the CPP web site to get your Operations Report details.
1020 – Williams Group Data Gathering	This report quickly gathers the data you need to give to your Williams Group consultant.

Reports	
Marketing Manager	
190 – Fees by Patient Source	Analyze the effectiveness of your marketing efforts and know the effectiveness of the marketing and referral efforts • Know net fees by marketing source • Compare net fees generated by months • Know net fees by source and which insurance the patients are associated with • Know which professionals are referring patients and the # of patients referred • Know net fees by employers • Know the net fees breakout by product type after selecting the patient Source. What types of products are sold based on the marketing effort?
210 – Internal Marketing – Patients spending over a specified amount	This report finds patients who spent over a specified amount on various product type or manufacturers. It can be used to invite patients to “trunk shows” frame promotions, etc. • Find patients spending over a specified amount • Know contact information or email addresses to merge to a mailer or email blast to market the practice based on past sales
220 – Diagnosis Codes by Patients	This report lists the patients and their diagnosis codes and CPT codes assigned on a fee slip. It also lists their demographics contact information • Find patients with a specific diagnosis • Find patients with a diagnosis and the CPT code assigned • Use in conjunction with Eyecor. • Notify patients with related diagnosis of new equipment, procedures, etc.
10 – Patient Listing with Insurance	• View listing of patients and their insurance carriers. • Select patients by a particular insurance carrier. • Select based on many other categories • Use for mailings or email notifications. • Analyze patient base based on insurance
15 – Patient Listing Demographics, Dates, et.al.	• View your active patient base • Select based on filters such as Last Office Visit, Last Exam Date, Age, Birth date • Use for mailings or email notifications • Analyze growth or decline of the patient base • Find and know financial status of patients • Understand breakout by age, ethnicity, gender, occupation. • Use in conjunction with 160 and 400 to know patient base to order frames. • Review meaningful Use fields are populated like Communication Preference, Race, Gender, Preferred Language. Ethnicity
20 – Graphs of Patient Demographic information	• Provides an easier view of report # 15 above.
Managed Care Managers	
10 – Patient Listing with Insurance	• Research scheduled patient’s insurance carriers before their appointment.
310 – Insurance Charge Backs and VSP Non Covered Charges	Know the amount you are being charged from VSP for non covered lab charge backs and the amount of charge backs by insurance company.
50 – Provider Productivity Units & Fees – Select a CPT Code and compare fees generated from that code	• Use only if you want to compare results by Provider • Compare Provider daily sales by Net Fees with summary or detail or products and services sold. • Compare Provider daily sales by Units sold with summary or detail or products and services sold.
55 – Provider Productivity Units & Fees – Select a Primary Diagnosis Code and compare fees generated from that code	• Use only if you want to compare results by Provider • Compare Provider daily sales by Net Fees with summary or detail or products and services sold. • Compare Provider daily sales by Units sold with summary or detail or products and services sold.
495 – Insurance Claims Open, On Hold, Submitted and with Errors	This report lists all claims that have been submitted electronically or have errors or are still open, Worksheets include: • Open Claims • On Hold Claims • Submitted Claims • Claims with errors
80 – Primary Diagnosis Codes by Providers and Insurance	• Know net fees and average fee and units generated by primary diagnosis. • Know net fees and average fee and units generated by primary diagnosis by provider • Know net fees and average fee and units generated by primary diagnosis by Insurance company

	• Compare net fees generated by primary diagnosis by insurance company. • Compare units generated by primary diagnosis by insurance company. • Compare net fees generated by primary diagnosis by provider. • Compare units generated by primary diagnosis by provider.
Based on collections	
650 – Applied Payments by Production, Financial, CPT and Diagnosis Codes	This report is the same as 110 and 115 except it is based on collections. It details actual payments applied by: • Production Groups by Providers compared • CPT Codes by Providers compared • Primary Diagnosis Codes by Providers compared
	Analyze CPT and Diagnosis Codes Assigned
70 – CPT Codes associated with Primary Diagnosis Codes	• Know what CPT Codes are resulting from Primary Diagnosis Codes and what net fees are generated by the Diagnosis • Know what CPT Codes are resulting from Primary Diagnosis Codes and the number of units that are generated by the Diagnosis • Know what Primary Diagnosis Codes generate a CPT Code and what net fees are generated by the CPT code. • Know what Primary Diagnosis Codes generate a CPT Code and the number of units that are generated by the CPT code
75 – CPT & Primary Diagnosis Performed by Age	• Know the count of CPT codes performed by Gender • Know the % of totals that the CPT codes charged make based on Age Ranges. • Know the count of CPT Codes charged by Patient Ages. • Know the count of Primary Diagnosis codes performed by Gender • Know the count of Primary Diagnosis Codes charged by Patient Ages. • Know the counts of CPT Codes charged to insurance companies by patient ages. • Know provider comparative results by patient ages
80 – Primary Diagnosis Codes by Providers and Insurance	• Know net fees and average fee and units generated by primary diagnosis. • Know net fees and average fee and units generated by primary diagnosis by provider • Know net fees and average fee and units generated by primary diagnosis by Insurance company • Compare net fees generated by primary diagnosis by insurance company. • Compare units generated by primary diagnosis by insurance company. • Compare net fees generated by primary diagnosis by provider. • Compare units generated by primary diagnosis by provider.
Insurance Companies Compared	
Based on Collections	
650 – Applied Payments by Production, Financial, CPT and Diagnosis Codes	This report is the same as 110 and 115 except it is based on collections. It details actual payments applied by: • Production Groups by Insurance companies • CPT Codes by Insurance companies compared • Primary Diagnosis Codes by Insurance companies compared
Based on Net Fees	
110 – Monthly Sales by Financial & Production Groups	• Know Net Fees and Units generated by Financial and Production Groups o By Insurance Company
115 – Monthly Fees by CPT Codes Months Compared	• Know Net Fees and units generated by CPT Codes o By Insurance Company
Buyers or Frame Reps	

160 – Frame Sales by Age, Cost, Fee, Gender, Mount +	• Analyze unit frame sales by the following categories:
	    o Net Fee Ranges
	    o Cost Ranges
	    o By patient age ranges and manufacturer after you select the manufacturer
	    o By patient age ranges by all manufacturers compared
	    o By Gender, Material, Mount, Usage or Type after selecting the category

165 – Graphs of Frame Sales by Gender, Mount +	• Using graphs for a visual view of frame units sales by:
	    o Usage
	    o Material
	    o Manufacturer
	    o Frame Type
	• Using graphs for a visual view of frame net fees by:

	○ Insurance Companies ○ Manufacturers
15 & 20 – Patient Demographic Listing	• View the patient demographics in conjunction with 160 and 400 to get a view of what frames should be ordered based on sales and demographics • Review meaningful Use fields are populated like Communication Preference, Race, Gender, Preferred Language. Ethnicity
If you maintain Board Locations	
510 – Frame Sales Gross Profits by Board Space	After selecting a period and the Board Space that is assigned to a frame, this report computes and details: • Gross profit by Board Space • # of Board Turns • Frames Sold with Gross Profit of Frames Sold
Inventory Manager	
250 – Products and Services Fees Only – Give to staff	This report lists al products and only their Fees after selecting the Product Type. It also lists the Quantity on Hand if you keep perpetual inventory. Use this list if you want staff to know fees without the costs.
530 – Vendor Listing	This report details all information on the vendor's setup in OfficeMate.
Use for product setup to get valid reporting results	
255 – Products Setup	This report is used to verify the setup of products with the various categories of sales to be sure you get valid reporting results. Be sure the following is correct and find those that are wrong: ○ Production and Financial Groups ○ Fees and Costs ○ Categories ○ Attributes Assigned
260 – Services Setup Listing	This report is used to verify the setup of services with the various categories of sales to be sure you get valid reporting results. Be sure the following is correct and find those that are wrong: ○ Production and Financial Groups ○ Fees and Costs ○ CPT Codes ○ Attributes Assigned ○ On Short List, Place of Service, Duration, etc.
510 – Frame Sales Gross Profits by Board Space	After selecting a period and the Board Space that is assigned to a frame, this report computes and details: • Gross profit by Board Space • # of Board Turns • Frames Sold with Gross Profit of Frames Sold
Perpetual Inventory Reports	Use these reports if you maintain perpetual inventory
265 – Products in Transit in Process or Committed with Board Location	This report lists the product board locations and details and the number of each that have a: • Quantity in Transit • Quantity in Process • Quantity Committed
500 – Inventory Adjustments made by Type	This report details all adjustments made to inventory quantities by type and recorded by with quantities and amounts. • Review inventory adjustments by type and recorded by • Review product transfers and who is making them • Review adjustments by dates made
520 – Inventory Listing with Quantities and Dates	This report details the quantities and dates related to inventory that is maintained using the perpetual inventory process. It lists: • Quantities On Hand, In Transit, On Order, Committed and In Process • Inventory values by Wholesale, Cost and retail • Dates Last received Last Sold, Last Returned and # of days to sell • Backordered status • Stocking Levels, Minimum Order Quantities, Minimum reorder quantities and minimum sample quantities • Board locations
535 – Physical Count	Print the history of your physical counts

Board Location Report	
270- Frame, Ready readers and Sunglasses Board Locations	This report lists the product board locations