

## CLIENT LEDGER

**Purpose:** Generate the Client Ledger report. The report displays client liability for services rendered, payment remittance, and the client's balance information. Charges with a \$0.00 fee are not shown unless a payment has been posted for them.

**Form:** Select Client / Choose by: All Episodes, Claim, Episode # / Date Range

**Report:** Date / Service / Unit / Charge / Guarantor / Guarantor Liability / Amount Received / Transfer Code / Date Posted / Claim Number

Client Ledger										
NAME:			CASE NUMBER:							
EPISODE # : 3 OF 3			BALANCE THIS EPISODE :							
CLIENT STATUS : ADMITTED			DATE OF LAST S/PAYMENT : NONE							
DATE	SERV	UNT	CHG	GUAR	GUARANTOR LIABILITY	AMOUNT RCVD	T	DATE POSTED	CLAIM NUMBER	

## CLIENT APPOINTMENT HISTORY

**Purpose:** Generate a report of the posted client appointments for any or all clients at any or all sites in the system for any specified date range.

**Form:** Individual or All Sites / Site / Individual or All Clients (if Individual, choose client and episode) / Start Date / End Date

**Report:** Appointment Date / Start and End Times / Site / Staff Member / Group / Service / Co Staff Member / Status

Appointment Date	Start Time	End Time	Site	Staff Member	Group	Service	Co Staff Member	Status
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## CLIENT APPOINTMENT LIST

**Purpose:** Generate a report of the unposted appointments for any or all clients at any or all sites in the system for any specified date range.

**Form:** Individual or All Sites / Site / Individual or All Clients / Start Date / End Date

**Report:** Appointment Date / Start and End Times / Site / Staff Member / Group / Service / Co Staff Member / Status

Appointment Date	Start Time	End Time	Site	Staff Member	Group	Service	Co Staff Member	Status
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## STAFF APPOINTMENT HISTORY

**Purpose:** Use this option to generate a report of the **posted** staff appointments for any or all staff members at any or all sites in the system for any specified date range.

**Form:** Individual or All Sites / Individual or All Practitioners / Date Range

**Report:** Appointment Date / Start/End Times / Site / Client / Group / Service / Co Staff Members / Status

* Staff Appointment History *									
Staff Member:									
Appointment Date	Start Time	End Time	Site	Client	Group	Service	Co Staff Member	Status	

## STAFF UNPOSTED APPOINTMENT LIST

**Purpose:** Use this option to generate a report of the **unposted** staff appointments for any or all staff members at any or all sites in the system for any specified date range.

**Form:** Individual or All Sites / Individual or All Practitioners / Date Range

**Report:** Appointment Date / Start/End Times / Site / Client / Episode / Group / Service / Co Staff Members / Status

* Staff Unposted Appointment List *										
Staff Member: GLOVER, HILLEL (000104)										
Appointment Date	Start Time	End Time	Site	Client	Epd Group	Service	Co Staff Member	Second Co Staff Member	Status	

Full Avatar Report List can be found at: <http://online.psych.org/>