

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

CLINIC MANAGEMENT REPORT

Purpose: Generate a report of client demographics, financial eligibility, or treatment information.

Form: Search (1) Basic Demographic Info (2) Guarantor Info (3) Last Seen Info (4) Treatment Info (by Date Range and Age Range)

Report:

ID# / Client Name / DOB / Gender / Medicaid # / Medicare # / Guarantor 1 / Guarantor 2 / Guarantor 3

P S C H PROMOTING SPECIALIZED CARE AND HEALTH								Clinic Service Client Guarantor Information Report from 2/19/2013 to 2/19/2013, and All Ages		
ID#	Client Name	DOB	Gender	Medicaid #	Medicare #	Guarantor-1	Guarantor-2	Guarantor-3		

DISPLAY MANAGED CARE AUTHORIZATIONS

Purpose: Generate a report that details guarantors authorized in the Managed Care Authorizations form.

Form: Client ID / Episode

Report: Authorization Number / Guarantor Number / Service Codes {authorized}

Authorization Information (ID# :)	
Authorization Number	= 5533
Guarantor Number 1	= (161) Medicaid - New
Service Code(s)	= (90804APG) PsytX, office, 20-30 min
	= (90806APG) PsytX, office, 45-50 min

FINANCIAL ELIGIBILITY REPORT

Purpose: Generate a report that contains the information entered in the **Financial Eligibility** option.

Form: Client ID / Episode / Select Guarantor(s) to view

Report: Full details for each guarantor

Financial Eligibility Guarantor #2 GUARANTOR Episode : 1			
Client Name :		MR# :	
Guarantor Name: Medicaid - New York		Policy # :	
Guarantor # : 161			
Medicaid # :			

GUARANTOR REPORT

Purpose: Generate a report that includes all consumers assigned a guarantor during the date range indicated for the program; number of services rendered are also reported.

Form: Search (1) Guarantor Detail Report (2) Guarantor Summary Report (by Date Range and Age Range)

Report: Summary (Age Group): Guarantor Name / Consumers Age 18+ / Service Age 18+

P S C H PROMOTING SPECIALIZED CARE AND HEALTH			Clinic Service Client and Guarantor Summary Report from 4/6/2013 to 5/6/2013	
Guarantor Name	Consumers Age 18+	Service Age 18+		