

# NPR Report Writing for B/AR



# Overview

- Understanding the B/AR transaction
- BAR.PAT versus BAR.BCH
- Writing Aged Trail Balance Reports
- Using Macros to get procedure information
- Using a compiled report in NPR

# Understanding the BAR.PAT Transaction Segment

- Two subscripts: Transaction class (txn.class) and transaction URN (txn.urn)
- Important Field: Transaction type (txn.type)

# Transaction Class

txn.class

There are only two transaction classes:

- C Charges
- O Other (Everything else)
  - Refunds, adjustments and payments
  - Comments
  - Transfers
  - Edits to insurance balance
  - Bill transactions
  - Etc.

# Transaction Type

txn.type

Some common transaction types:

- C Charge
- c Comment
- P Payment to patient (refund)
- R Receipt from patient
- A Adjustment

# Important B/AR Reminder

- In the BAR.PAT, @account refers to the internal urn or unique record number and not the account number.
- The account number is called @number.
- This carries over to other area of B/AR. For example, in BAR.BCH, the BAR.PAT urn is called @txn.account and in the BAR.PAT period end data, the urn is @pe.account.

# BAR.PAT vs. BAR.BCH

## BAR.PAT

- Data is rarely purged
- Must go through pt txns to find each one

## BAR.BCH

- Usually purged every 6-12 months
- Easy access to txns for date range
- Purged is Parameter driven

# BAR.PAT Transaction Report

- DPM: BAR.PAT
- SEGMENT: bar.acct.transactions
- REPORT: zcus.is.txn.report.example
- INDEX: bar.acct.activity.index
- Demonstrates most efficient way to extract charges, payments, adjustments and refunds from patient file
- Uses txn.type to help in selecting transactions



# BAR.PAT Transaction Report

NPR (A/LIVE.MIS/291) - SERRANO,RICHARD

Enter/Edit Page 1

Report DPM	BAR.PAT	Report Name	zcus.is.txn.report.example		
Report Title	TRANSACTION REPORT EXAMPLE FOR MUSE				
Active	<input checked="" type="checkbox"/>	Last Edit By		Date	
Detail DPM	BAR.PAT	Detail Segment	bar.acct.transactions		
Index DPM	BAR.PAT	Index File	bar.acct.activity.index		
Chars/Line	132	Lines/Page	60	Page Size	66
Chars/Inch	12	Lines/Inch	6	Left Margin	0
Page Banner	REG	Report Header	N	Detail	<input checked="" type="checkbox"/>
Page Header	<input checked="" type="checkbox"/>	Report Trailer	<input checked="" type="checkbox"/>	Compiled File	
Page Trailer	<input type="checkbox"/>				

Enter/Edit Report Documentation?

This report example is a shell that allows extraction of charges, adjustments, receipts, refunds from BAR.PAT.

The most efficient way to extract the data is to use the activity index. In Magic the retention of this index is parameter driven. In C/S, it is 10days. If you need to go beyond either the Magic or C/S retention, then exclude the index and run the report for just txn.bch.date.

C/S Notes:

Detail Segment: transactions  
Index File: activity.x

# BAR.PAT Transaction Report

NPR (A/LIVE.MIS/291) - SERRANO,RICHARD

Enter/Edit Report Page 2

Report Name

Sort Field	Order	Header	Trailer	Renumber	Pages
1 <input type="text" value="activity.date"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 <input type="text" value="account"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 <input type="text" value="txn.class"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 <input type="text" value="txn.urn"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Select Field/Prompt or Value	Oper/Default or Keyword
1 <input type="text" value="activity.date"/>	<input type="text" value="GE"/>
<input type="text" value="FROM BCH DATE"/>	<input type="text"/>
2 <input type="text" value="activity.date"/>	<input type="text" value="LE"/>
<input type="text" value="THRU BCH DATE"/>	<input type="text"/>
3 <input type="text" value="txn.bch.date"/>	<input type="text" value="GE"/>
<input type="text" value="(b.activity.date)"/>	<input type="text"/>
4 <input type="text" value="txn.bch.date"/>	<input type="text" value="LE"/>
<input type="text" value="(e.activity.date)"/>	<input type="text"/>

Select Relationship

<input type="text"/>	5 <input type="text" value="txn.type"/>	<input type="text" value="LI"/>
	<input type="text" value="/TYPES"/>	<input type="text"/>
	6 <input type="text"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="text"/>

# Txn Types Defined In a Macro

The image shows a screenshot of a software interface with two windows. The main window is titled "NPR (A/LIVE.MIS/291) - SERRANO,RICHARD" and contains a sub-window titled "Enter/Edit Macro Logic: BAR.PAT.zcus.is.txn.report.example.M.build.table (A: )". The macro logic text is: `1=>/TYPESE["C" ]>TYPESE["A" ]>/TYPESE["P" ]>/TYPESE["R" ]|`. A second window titled "Edit Footnotes" is overlaid on the bottom right, containing the text: `AL START bui ld.table|`.

```
NPR (A/LIVE.MIS/291) - SERRANO,RICHARD
Enter/Edit Macro Logic: BAR.PAT.zcus.is.txn.report.example.M.build.table (A: )
1=>/TYPESE["C" ]>TYPESE["A" ]>/TYPESE["P" ]>/TYPESE["R" ]|

Edit Footnotes
AL START bui ld.table|
```

# BAR.PAT Transaction Report

NPR (A/LIVE.MIS/291) - SERRANO,RICHARD

Enter/Edit Report: TRANSACTION REPORT EXAMPLE FOR MUSE Page 3

Editing FIELDS - <ESC> for PICTURE or REGIONS

REG	A	0	1	2	3	4	5	6	7	8
HP	.									
HP	.									
HP	.									
HP	.									
HP	+	BCH DATE	ACCT#		PATIENT NAME		TXN		TXN DESCR	
HP	.									
D	.	txn.bch.	number		name		txn.proced		txn.procedure's.des	
TR	.									
	.									
	.									
	.									
	.									
	.									
	.									
	1									
	.									
	.									
	.									
	.									
	.									
	.									
	.									
	.									
	+									

FOR BCH DATES: xx.bd\_\_ - xx.ed\_\_

Field Name	Field Marker
> 5 txn.procedure's.description	A txn.procedure's.des
6 txn.count	txn.
7 txn.amount	txn.amount

# BAR.BCH Transaction Report

- DPM: BAR.BCH
- REPORT: zcus.is.txn.report.example
- SEGMENT: bar.batch.txn.items
- INDEX: bar.batch.index
- Demonstrates most efficient way to extract charges, payments, adjustments and refunds from batches
- Uses item.type to help in selecting transactions and possessives to get account data

# BAR.BCH Transaction Report

NPR (A/LIVE.MIS/291) - SERRANO,RICHARD

Enter/Edit Page 1

Report DPM	BAR.BCH	Report Name	zcus.is.txn.report.example				
Report Title	REPORT EXAMPLE FOR MUSE						
Active	<input checked="" type="checkbox"/>	Last Edit By	RS	Date	09/07/09	Time	1526
Detail DPM	BAR.BCH	Detail Segment	bar.batch.txn.items				
Index DPM	BAR.BCH	Index File	bar.batch.index				
Chars/Line	132	Lines/Page	60	Page Size	66	Left Margin	0
Chars/Inch	12	Lines/Inch	6				
Page Banner	REG	Report Header	N	Detail	<input checked="" type="checkbox"/>	Compiled File	
Page Header	<input checked="" type="checkbox"/>	Report Trailer	<input checked="" type="checkbox"/>				
Page Trailer	<input type="checkbox"/>						

Enter/Edit Report Documentation?

This report example is a shell that allows extraction of charges, payments, adjustments, refunds from BAR BCH.

C/S Note:  
Detail segment: transaction.items  
Index: id.x

# BAR.BCH Transaction Report

NPR (A/LIVE.MIS/291) - SERRANO,RICHARD

Enter/Edit Report Page 2

Report Name

Sort Field	Order	Header	Trailer	Renumber	Pages
1 <input type="text" value="date"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 <input type="text" value="journal"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 <input type="text" value="number"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 <input type="text" value="urn"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 <input type="text" value="txn.number"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="checkbox"/>	<input type="checkbox"/>

Select Field/Prompt or Value	Oper/Default or Keyword
1 <input type="text" value="date"/> <input type="text" value="FROM BCH DATE"/>	<input type="text" value="GE"/> <input type="text"/>
2 <input type="text" value="date"/> <input type="text" value="THRU BCH DATE"/>	<input type="text" value="LE"/> <input type="text"/>
3 <input type="text" value="item.type"/> <input type="text" value="/TYPES"/>	<input type="text" value="LI"/> <input type="text"/>
4 <input type="text" value="status"/> <input type="text" value="'POSTED'"/>	<input type="text" value="EQ"/> <input type="text"/>

Select Relationship

# BAR.BCH

## Transaction Report

NPR (A/LIVE.MIS/291) - SERRANO,RICHARD

Enter/Edit Report: REPORT EXAMPLE FOR MUSE Page 3

Editing Picture - <ESC> for Fields or Regions    <Insert Mode>    [0->81]

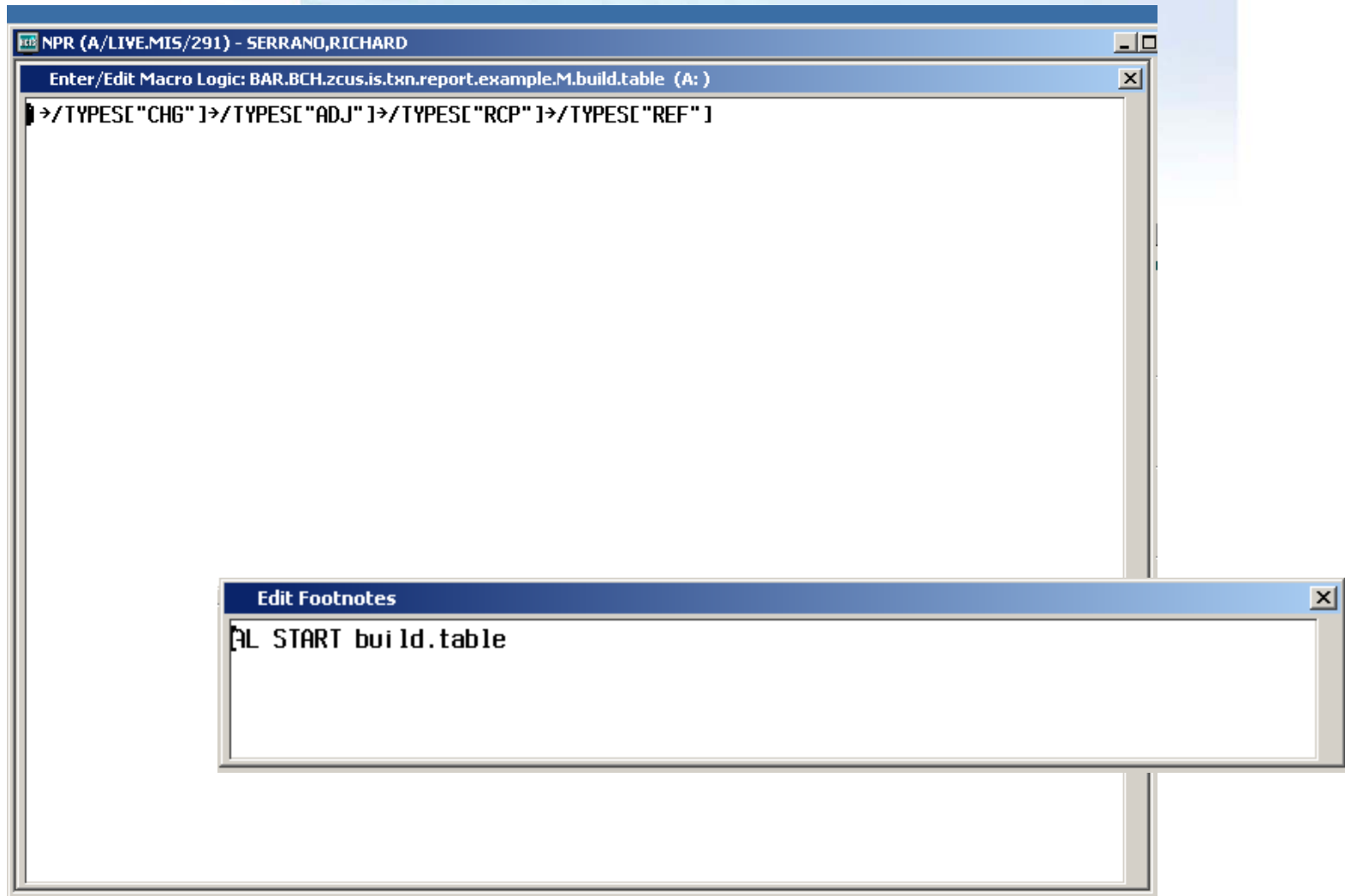
REG	A	0	1	2	3	4	5	6	7	8
HP	.	FOR BCH DATE: xx.bd____ - xx.ed____								
HP	.									
HP	.									
HP	.	BCH DATE	ACCT#	PATIENT NAME			TXN	TXN DESCRIPTI		
HP	+									
D	.	date____	txn.account'	txn.account's.name_____			item.proce	item.procedur		
TR	.									
	.									
	.									
	.									
	.									
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	.									
	.									
	.									
	+									

	Field Name	A	Field Marker
5	txn.account's.name		txn.account's.name
6	item.procedure		item.proce
> 7	item.procedure's.description		item.procedure's.de



# Item Types Defined In a Macro



# BAR.PAT Report Using BAR.BCH for Index

- DPM: BAR.PAT
- REPORT: zcus.is.batch.index.test
- SEGMENT: bar.acct
- INDEX: none (index built in macro)
- Demonstrates how to use the batches in BAR.BCH to select accounts in BAR.PAT
- Useful when complex patient data is needed for patients with transactions on specific dates (example: large extracts or interfaces)

# BAR.PAT Report Using BAR.BCH for Index

NPR (A/LIVE.MIS/453) - SERRANO,RICHARD

Enter/Edit Page 1

Report DPM	BAR.PAT	Report Name	zcus.is.bch.index.test				
Report Title	EXAMPLE USING BAR.BCH TO SELECT ACCOUNTS						
Active	<input checked="" type="checkbox"/>	Last Edit By	RS	Date	09/07/09	Time	1639
Detail DPM	BAR.PAT	Detail Segment	bar.acct				
Index DPM		Index File					
Chars/Line	92	Lines/Page	60	Page Size	66	Left Margin	0
Chars/Inch	12	Lines/Inch	6				
Page Banner	REG	Report Header	N	Detail	<input checked="" type="checkbox"/>	Compiled File	
Page Header	<input checked="" type="checkbox"/>	Report Trailer	N				
Page Trailer	N						

Enter/Edit Report Documentation?

This example shows how to use batches to id accounts that had activity on a specific day in order to be included on a BAR.PAT report such as a large extract.

# BAR.PAT Report Using BAR.BCH for Index

NPR (A/LIVE.MIS/453) - SERRANO,RICHARD

Enter/Edit Report Page 2

Report Name

	Sort Field	Order	Header	Trailer	Renumber	Pages
1	<input type="text" value="account"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Select Field/Prompt or Value	Oper/Default or Keyword
1	<input type="text" value="account"/>	<input type="text" value="LI"/>
	<input type="text" value="/ACCTS"/>	<input type="text"/>
2	<input type="text"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="text"/>

Select Relationship

# BAR.PAT Report Using BAR.BCH for Index

```
NPR (A/LIVE.MIS/453) - SERRANO,RICHARD
Enter/Edit Macro Logic: BAR.PAT.zcus.is.bch.index.test.M.get.accts (A:)
; This macro will use the BAR.BCH number index to loop thru the batches for yesterday
; and find accts that had activity. Those accts will be loaded into /ACCTS for selection
; by this report. BAR.BCH.number index subscripts [date,number]
;
; %Z.date.add(@.today,(0-1))>/YESTERDAY,
;
; /YESTERDAY>BAR.BCH.date,
"">BAR.BCH.number,
DO{@Next(BAR.BCH.number,@BAR.BCH.number.x) @BAR.BCH.number.x>BAR.BCH.urn,
      "">BAR.BCH.txn.number,
      [DO{@Next(BAR.BCH.txn.number) 1>/ACCTS[@BAR.BCH.txn.account]}}

```

```
Edit Footnotes
AL START get.accounts

```

# Writing an Aged Trail Balance Report

- DPM: BAR.PAT
- REPORT: zcus.is.pe.atb.report.example
- SEGMENT: bar.acct.pe.insurance.ledger
- INDEX: None
- Demonstrates writing reports using PE segments and summarizes by insurance buckets where dollars are prorated
- Creates age buckets beyond the std MT buckets using DO loop and Macro

# Writing an Aged Trail Balance Report

NPR (A/LIVE.MIS/453) - SERRANO,RICHARD

Enter/Edit Page 1

Report DPM	BAR.PAT	Report Name	zcus.is.pe.atb.report.example		
Report Title	PE ATB BY INSURANCE GROUP				
Active	<input checked="" type="checkbox"/>	Last Edit By	RS	Date	09/07/09
		Time	1722		
Detail DPM	BAR.PAT	Detail Segment	bar.acct.pe.insurance.ledger		
Index DPM		Index File			
Chars/Line	170	Lines/Page	60	Page Size	66
Chars/Inch	12	Lines/Inch	6	Left Margin	0
Page Banner	REG	Report Header	N	Detail	N
Page Header	<input checked="" type="checkbox"/>	Report Trailer	<input checked="" type="checkbox"/>	Compiled File	
Page Trailer	<input type="checkbox"/>				

Enter/Edit Report Documentation?

C/S NOTES:  
Detail Segment: pe.insurance.ledger

# Writing an Aged Trail Balance Report

NPR (A/LIVE.MIS/453) - SERRANO,RICHARD

Enter/Edit Report Page 2

Report Name

Sort Field	Order	Header	Trailer	Renumber	Pages
1 <input type="text" value="pe.ins's.insurance.group"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="Y"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 <input type="text" value="period"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 <input type="text" value="pe.account"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 <input type="text" value="pe.ins"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Select Field/Prompt or Value	Oper/Default or Keyword
1 <input type="text" value="period"/> <input type="text" value="PERIOD END DATE"/>	<input type="text" value="EQ"/> <input type="text"/>
2 <input type="text" value="pe.bar.status"/> <input type="text" value="/STATUS"/>	<input type="text" value="LI"/> <input type="text"/>
3 <input type="text" value="pe.corp"/> <input type="text" value="CORP"/>	<input type="text" value="EQ"/> <input type="text"/>
4 <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>

Select Relationship



# Writing an Aged Trail Balance Report

NPR (A/LIVE.MIS/453) - SERRANO,RICHARD

Enter/Edit Report: PE ATB BY INSURANCE GROUP Page 3

<Entering Report Footnotes> - Press <ESC> when finished

REG	A	0	1	2	3	4	5	6	7	8
HP	.									
HP	.									
HP	.									
HP	.	AGE GROUP								
HP	.	INS GROUP		#/ACCTS		0-30		31-60		61-90
HP	+									
TK1	.	pe.ins's.i		xx.n.acc		xx.0.30		xx.31.60		xx.61.90
TR	.									
TR	.	GRAND TOTALS:		xx.n.acc		xx.0.30		xx.31.60		xx.61.90
	.									
	1									
	.									
	.									
	.									
	+									

Edit Footnotes

AL START 1=>/STATUSE"FB" J=>/STATUSE"IB" J=>/STATUSE"UB" J

3 AL D aging

4 AL AFTER.TK1 ""=>/AG30=>/AG60=>/AG90=>/AG120=>/AG180=>/AG365=>/AG366

> 5

# Writing an Aged Trail Balance Report

```
NPR (A/LIVE.MIS/786) - SERRANO,RICHARD
Enter/Edit Macro Logic: BAR.PAT.zcus.is.pe.atb.report.example.M.aging (A:)
; this macro loops thru each bill and creates bucket totals
; N bills are aged into the 0-30 Bucket
""->pe.ins.bill.no,
DO{@Next(pe.ins.bill.no) 1,
      IF{pe.ins.bill.no="N" c.period;@pe.ins.bill.age.date}>DAT,
      @COMPUTE.AGE.BUCKETS}

COMPUTE.AGE.BUCKETS
@pe.ins.bill.balance->BAL,
%Z.date.sub(c.period,DAT)->AGE,
IF{AGE<31 BAL+ /AG30>/AG30;
  AGE<61 BAL+ /AG60>/AG60;
  AGE<91 BAL+ /AG90>/AG90;
  AGE<121 BAL+ /AG120>/AG120;
  AGE<181 BAL+ /AG180>/AG180;
  AGE<366 BAL+ /AG365>/AG365;
  AGE>365 BAL+ /AG366>/AG366}
```

# Using Period End Revenue Data in Reports

- DPM: BAR.REV.PI.AT
- REPORT: zcus.is.proc.summ.by.io
- SEGMENT: bar.rev.by.pi.at.procs
- INDEX: None
- Data is stored by Corp, Dept, Primary Ins, Acct Type and Procedure
- Demonstrates summary reporting by dept and procedure, by IP vs. OP and getting a CPT code via a macro

# Using Period End Revenue Data in Reports

NPR (A/LIVE.MIS/786) - SERRANO,RICHARD

Enter/Edit Page 1

Report DPM	BAR.REV.PI.AT	Report Name	zcus.is.proc.summ.by.io				
Report Title	IP/OP PROCEDURE REVENUE SUMMARY BY GL DEPT						
Active	<input checked="" type="checkbox"/>	Last Edit By	RS	Date	09/08/09	Time	0814
Detail DPM	BAR.REV.PI.AT	Detail Segment	bar.rev.by.pi.at.procs				
Index DPM		Index File					
Chars/Line	200	Lines/Page	60	Page Size	66	Left Margin	0
Chars/Inch	12	Lines/Inch	6				
Page Banner	REG	Report Header	<input type="checkbox"/>	Detail	<input type="checkbox"/>	Compiled File	
Page Header	<input type="checkbox"/>	Report Trailer	<input checked="" type="checkbox"/>				
Page Trailer	<input type="checkbox"/>						

Enter/Edit Report Documentation?

C/S NOTES:  
Detail Segment: proc.info

# Using Period End Revenue Data in Reports

NPR (A/LIVE.MIS/786) - SERRANO,RICHARD

Enter/Edit Report Page 2

Report Name

	Sort Field	Order	Header	Trailer	Renumber	Pages
1	<input type="text" value="chg.dept"/>	<input type="text" value="ASC"/>	<input type="text" value="PAGE"/>	<input type="text" value="Y"/>	<input type="text" value="N"/>	<input type="text" value="N"/>
2	<input type="text" value="proc"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="Y"/>	<input type="text" value=""/>	<input type="text" value=""/>
3	<input type="text" value="date.segment"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="text" value=""/>	<input type="text" value=""/>
4	<input type="text" value="corp"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="text" value=""/>	<input type="text" value=""/>
5	<input type="text" value="pri.ins"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="text" value=""/>	<input type="text" value=""/>

	Select Field/Prompt or Value	Oper/Default or Keyword
1	<input type="text" value="date.segment"/>	<input type="text" value="EQ"/>
	<input type="text" value="PERIOD END DATE"/>	<input type="text" value=""/>
2	<input type="text" value="chg.dept"/>	<input type="text" value="RL"/>
	<input type="text" value="GL DEPARTMENT"/>	<input type="text" value="ALL"/>
3	<input type="text" value=""/>	<input type="text" value=""/>
	<input type="text" value=""/>	<input type="text" value=""/>
4	<input type="text" value=""/>	<input type="text" value=""/>
	<input type="text" value=""/>	<input type="text" value=""/>

Select Relationship

# Using Period End Revenue Data in Reports

NPR (A/LIVE.MIS/786) - SERRANO,RICHARD

Enter/Edit Report: IP/OP PROCEDURE REVENUE SUMMARY BY GL DEPT Page 3

Editing Picture - <ESC> for Fields or Regions <Insert Mode> [0->81]

REG	A	0	1	2	3	4	5	6	7	8	
HP1	.	PERIOD END DATE: xx.pe____									
HP1	.	GL DEPT: chg.dept_____ chg.dept's.name_____									
HP1	.	-----									
HP1	.									IP	
HP1	+	PROCEDURE	DESCRIPTION		CPT	CHGCAT				QTY	
HP1	.										
TK2	.	proc_____	proc's.description_____		xx.cpt	proc's.c			inp.	__i	
TK1	.										
TK1	.	GL DEPT TOTALS:								inp.	__i
TK1	1										
TR	.	GRAND TOTALS:								inp.	__i
	.										
	.										
	.										
	+										

	Field Name	A	Field Marker
11	out.amount		out.amount
12	year.inp.count		year.
13	year.inp.amount		year.inp.amo

# Using Period End Revenue Data in Reports

NPR (A/LIVE.MIS/786) - SERRANO,RICHARD

Enter/Edit Report: IP/OP PROCEDURE REVENUE SUMMARY BY GL DEPT Page 3

Editing Picture - <ESC> for Fields or Regions <Insert Mode> [59->140]

REG	A	6	7	8	9	0	1	2	3	4
HP1	.									
HP1	.									
HP1	.									
HP1	.									
HP1	+	AT								
HP1	.									
TK2	.	's.c	inp.	__inp.amount		out.	__out.amount		year.	year.inp.amo
TK1	.		inp.	__inp.amount		out.	__out.amount		year.	year.inp.amo
TK1	.		inp.	__inp.amount		out.	__out.amount		year.	year.inp.amo
TK1	1		inp.	__inp.amount		out.	__out.amount		year.	year.inp.amo
TR	.		inp.	__inp.amount		out.	__out.amount		year.	year.inp.amo
	.									
	.									
	+									

PERIOD

YTD

IP IP OP OP IP IP

QTY \$\$ QTY \$\$ QTY \$\$

Field Name

Field Marker

11	out.amount	A	out.amount
12	year.inp.count		year.
13	year.inp.amount		year.inp.amo

# Using Period End Revenue Data in Reports

The screenshot displays a software window titled "NPR (A/LIVE.MIS/786) - SERRANO,RICHARD". Inside, a macro editor window titled "Enter/Edit Macro Logic: BAR.REV.PI.AT.zcus.is.proc.summ.by.io.M.get.cpt4 (A:)" contains the following code:

```
@proc->BAR.PROC.mnemonic,  
"CPT-4">BAR.PROC.alt.code.type,  
@Last(BAR.PROC.alt.code.eff.date)->EFD,  
@BAR.PROC.alt.code[EFD]->/CPT4
```

Two smaller dialog boxes are overlaid on the main window:

- Edit Footnotes:** Contains the text:

```
AL D get.cpt4  
AL AFTER.TK2 ""->/CPT4
```
- Edit Field Attributes: xx.cpt:** Contains the text:

```
DAT=FREE  
JFY=L  
LEN=6  
VAL=/CPT
```



# Using Macros to get Procedure Information

- DPM: BAR.PROC
- REPORT: zcus.is.cpt.and.fee.sched.example
- SEGMENT: bar.proc.dict
- INDEX: None
- Demonstrates getting the CPT code, standard price and scheduled price for each procedure via a macro

# Using Macros to get Procedure Information

NPR (A/LIVE.MIS/670) - SERRANO,RICHARD

Enter/Edit Page 1

Report DPM	BAR.PROC	Report Name	zcus.is.cpt.and.fee.sched.example				
Report Title	PROC DICT AND FEE SCHED EXAMPLES						
Active	<input checked="" type="checkbox"/>	Last Edit By	RS	Date	09/08/09	Time	0854
Detail DPM	BAR.PROC	Detail Segment	bar.proc.dict				
Index DPM		Index File					
Chars/Line	92	Lines/Page	60	Page Size	66	Left Margin	0
Chars/Inch	12	Lines/Inch	6				
Page Banner	REG	Report Header	N	Detail	<input checked="" type="checkbox"/>	Compiled File	
Page Header	<input checked="" type="checkbox"/>	Report Trailer	<input checked="" type="checkbox"/>				
Page Trailer	<input type="checkbox"/>						

Enter/Edit Report Documentation?

C/S NOTES:  
Detail Segment: main

# Using Macros to get Procedure Information

ACTS NPR (A/LIVE.MIS/670) - SERRANO,RICHARD

Enter/Edit Report Page 2

Report Name

	Sort Field	Order	Header	Trailer	Renumber	Pages
1	<input type="text" value="mnemonic"/>	<input type="text" value="ASC"/>	<input type="text" value="NONE"/>	<input type="text" value="N"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Select Field/Prompt or Value	Oper/Default or Keyword
1	<input type="text" value="active"/> <input type="text" value="'Y'"/>	<input type="text" value="EQ"/> <input type="text"/>
2	<input type="text" value="type"/> <input type="text" value="'CHG'"/>	<input type="text" value="EQ"/> <input type="text"/>
3	<input type="text"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>
4	<input type="text"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>

Select Relationship

# Using Macros to get Procedure Information

NPR (A/LIVE.MIS/670) - SERRANO,RICHARD

Enter/Edit Report: PROC DICT AND FEE SCHED EXAMPLES Page 3

Editing Picture - <ESC> for Fields or Regions      <Insert Mode>      [0->81]

REG	A	0	1	2	3	4	5	6	7	8
HP	.									
HP	.									
HP	.									
HP	.	PROC	DESCRIPTION			CPT	STD PRICE	OP PRICE		
HP	+									
D	.	mnemonic__	description_____			xx.cpt	xx.std.pri	xx.op.pric		
TR	.									
	.									
	.									
	.									
	1									
	.									
	.									
	.									
	.									
	+									

	Field Name	A	Field Marker
3	xx.cpt	*	xx.cpt
4	xx.std.price	*	xx.std.pri
> 5	xx.op.price	*	xx.op.pric

# Using Macros to get Procedure Information

```
NPR (A/LIVE.MIS/670) - SERRANO,RICHARD
Enter/Edit Macro Logic: BAR.PROC.zcus.is.cpt.and.fee.sched.example.M.get.data (A:)

@INIT,
@LOAD.CPT,
@LOAD.STD,
@LOAD.OP

INIT
""->/CPT4->/STDPRICE->/OPPRICE

LOAD.CPT
"CPT-4"->alt.code.type,
@Last(alt.code.eff.date)->EFD,
@alt.code[EFD]->/CPT4

LOAD.STD
@Last(std.effective.date)->SEFD,
@std.effective.date.charge[SEFD]->/STDPRICE

LOAD.OP
"OP"->sched.name,
@Last(fs.effective.date)->FSEFD,
@fs.effective.date.charge[FSEFD]->/OPPRICE
```

# Using Macros to get Procedure Information

```
Edit Footnotes [X]  
VAL D get .data
```

```
Edit Field Attributes: xx.cpt [X]  
DAT=FREE  
JFY=L  
LEN=6  
VAL=/CPT4
```

```
Edit Field Attributes: xx.std.price [X]  
DAT=MONEY  
JFY=R  
LEN=10  
VAL=/STDPRICE
```

```
Edit Field Attributes: xx.op.price [X]  
DAT=MONEY  
JFY=R  
LEN=10  
VAL=/OPPRICE
```

# Using a BAR Compiled Report Selection

- DPM: BAR.PAT
- REPORT: zcus.is.compiled.test
- SEGMENT: bar.acct
- INDEX: BAR.RPT.bar.rpt.patient.detail.accts
- Demonstrates how to use the accounts included in a BAR compiled report as the selection in an NPR report

# Using a BAR Compiled Report Selection

Compile/View Patient Detail Reports

File # **78043** Copy From File #

Selection **COMM10P** Additional Title

Major Sort **ANY COLLECTOR** Minor Sort **CUR PRI INS** Account Sort **NAME**

Started **08/31/03 1645** By **ZCIS.SCRPT** Count **0**

	Select Field	Uses Index	Inc Exc Nil Any	Use Query	From Value	Thru Value
1	CUR STATUS	Y	I		FB	FB
2	CUR AGE BUCKET	Y	I		2	6
3	PRI INS BALANCE	N	I		500.00	99999999.00
4	ANY COLLECTOR	Y	I		COMM1	COMM8
5	CUR PRI INS	Y	I		WAFRD	WAFRD
6	CUR PRI INS	Y	I		WAUSTRAD	WAUTO
7	CUR PRI INS	Y	I		WCHAMPU	WCHAMPU
8	CUR PRI INS	Y	I		WCLERGY	WCOMM3



# Using a BAR Compiled Report Selection

Enter/Edit Report						Page 1	
Report DPM	BAR.PAT	Report Name	zcus.is.compiled.test				
Report Title	TEST REPORT						
Active	Y	Last Edit By	Date	Time			
Detail DPM	BAR.PAT	Detail Segment	bar.acct				
Index DPM	BAR.RPT	Index File	bar.rpt.patient.detail.accts				
Chars/Line	92	Lines/Page	60	Page Size	66	Left Margin	0
Chars/Inch	12	Lines/Inch	6				
Page Banner	REG	Report Header	N	Detail	Y	Compiled File	
Page Header	Y	Report Trailer	N				
Page Trailer	N						
Enter/Edit Report Documentation?							
THIS REPORT USES A BAR COMPILED REPORT AS THE INDEX.							

C/S Notes: Detail Segment: main  
Index: BAR.RPT selected.rpt.sels

# Using a BAR Compiled Report Selection

The index lookup if left blank:

```
Lookup █  
Index File Name  
1 BAR.RPT.reminder.queue.x  
2 bar.rpt.type.index  
3 biller.queue.x
```

The index isn't there!

# Using a BAR Compiled Report Selection

The index lookup if seeded with an A:

```
Lookup 
Index File Name
↑
1 bar.rpt
2 bar.rpt.bd.xfer.accts
3 bar.rpt.bd.xfer.numbers
4 bar.rpt.bills.accts
5 bar.rpt.cci.sels
6 bar.rpt.cpu.confirmation
7 bar.rpt.drft.sels
8 bar.rpt.forms.accts
9 bar.rpt.forms.accts.bills
10 bar.rpt.forms.list
11 bar.rpt.guar.stmts.accts
12 bar.rpt.letters.accts
13 bar.rpt.one.frn.print.image
14 bar.rpt.pat.stmts.accts
15 bar.rpt.patient.detail.accts
16 bar.rpt.receipt.sels
17 bar.rpt.reminder.queue.txns
18 bar.rpt.select.rpt.ind.override
19 bar.rpt.selections
20 bar.rpt.type.index
21 biller.queue.items
22 biller.queue.select.info
23 biller.queue.x
↓
```



There's our index!

# Using a BAR Compiled Report Selection

Enter/Edit Report		Page 2			
Report Name	BAR.PAT.zcus.is.compiled.test				
Sort Field	Order	Header	Trailer	Renumber	Pages
1 BAR.RPT.list.urn	ASC	NONE	N		
2 BAR.RPT.srpt.sort1	ASC	NONE	N		
3 BAR.RPT.srpt.sort2	ASC	NONE	N		
4 BAR.RPT.srpt.sort3	ASC	NONE	N		
5 BAR.RPT.srpt.account	ASC	NONE	N		
Select Field/Prompt or Value	Oper/Default or Keyword				
1 BAR.RPT.list.urn	EQ				
SELECTION FILE:					
2					
3					

Note that all of the sorts and selects are in BAR.RPT because they are already done in the compiled report.

# Using a BAR Complied Report Selection

TEST REPORT	
SELECTION FILE	<input type="text"/>

When running the report, enter the complied report number.

# Other Useful DPMS

- BAR.AR.BAL
- BAR.BD.BAL
- BAR.UB.BAL
- All contained Period End data
- Ties back to PE Operations Summary
- Each contained various breakdowns

I Can Help!

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