Accounts Receivable Summary
Summary of accounts receivable by practitioner. Balance is as of print time and displays current, over 30, over 60, over 90, totals of outstanding amounts, and unapplied credits. These totals are displayed for Patient, MSP, ICBC, WCB, and 3rd party. Summary by clinic is displayed at the end of report.

All Patient Statement (Detailed)
A/R statement for all patients with a balance greater than $5.00.Balance is as of the "To" date selected. Displays clinic name address and phone number, today's date, patient name, chart number, address as well as phone numbers. Displays transaction date, description, paid/applied amounts, and balance. Also displays current, over 30, over 60, over 90 totals.

Annual Patient Visits by Practitioner
Displays number of unique patients, patient visits, and average visits by year by practitioner.

Appointment List
This report displays appointments by practitioner, by date, including time of appointment, name, age, last visit date, phone number, work phone number, and reason for visit. Also shows patients booked, arrived, cancelled, rescheduled, and no showed.

Appointment List – Wide
Same as appointment list in Landscape view.

Appointment Sheet
Displays appointments by practitioner, including the patient's name, and the time of the appointment. Columns are available for notes.

Appointment Statistics Totals
Monthly Appointment statistics totals in the selected range, by practitioner with a clinic total on last page. Lists appointments by arrivals, cancels, no shows, reschedules, and no status, with number of appointments and %. Lists categories as well. Shows bar graph for sum of arrived, sum of cancelled, sum of no showed, sum of rescheduled, and sum of no status appointments..

Appointment Statistics Detailed
Shows appointment statistics by practitioner by date for cancelled, no show, rescheduled, or new patients. Shows time, name, age, gender, phone, status, next appointment, recall, and reason. Also lists statistical report of total appointments, arrivals & %, cancels & %, no shows & %, reschedules for another day & %, no status and %, and reschedules for today. Also lists category of visits.

Appointment Statistics Detailed- all
Shows appointment statistics by practitioner by date for all patients.. Lists time, name, age, gender, phone, status, next appointment, recall, reason. Also lists statistical report of total appointments, arrivals & %, cancels & %, no shows & %, reschedules for another day & %, no status and %, and reschedules for today. Also lists category of visits.

Appointment Statistics Summary – Color
Appointment statistics summary by date for the selected date range, for one practitioner or multiple practitioners. Displays date, total appointments, arrivals & %, cancels & %, no shows & %, reschedules & %, no status & %, and new patients. Also displays categories. Double clicking on a date will display the patients, phone number, and reason for appointment for that date. Shows color bar graph on appointment statistics at bottom, with sum of appointments, sum of arrived, sum of no shows, sum of cancelled, sum of rescheduled. Each practitioner will be listed on a new page.

Appointment Statistics Summary – Greyscale
Appointment statistics summary by date for the selected date range, for one practitioner or multiple practitioners. Displays date, total appointments, arrivals & %, cancels & %, no shows & %, reschedules & %, no status & %, and new patients. Also displays categories. Double clicking on a date will display the patients, phone number, and reason for appointment for that date. Shows greyscale bar graph on appointment statistics at bottom, with sum of appointments, sum of arrived, sum of no shows, sum of cancelled, sum of rescheduled. Each practitioner will be listed on a new page.

AR Statement Labels
Labels for all patients who had an A/R statement printed for the date range. Does not limit by practitioner. Prints patient name and address.

Basic Statement (Extended)
Basic statement for all visits within the date range for the selected patient. Displays practitioner name and registration, email, clinic name and address as well as phone number and website, today's date, patient name and address, and chart number. Transaction details include practitioner, date, fee code, description, fee, paid. Totals fee and paid after transactions listed.

Birthday Labels – 5160
Birthday labels for Avery 5160. Prints patient's birthdays in the selected date range. Patients who have not had a visit within the last two years are ignored.

Cashout by Practitioner
Payment totals summarized by practitioner. . Showing cash and cheques in till, totals under cards (Visa, M/C, Debit, Other) total under TelePlan, grand total, and refused or NSF cheques. Summarized by Till and Cards, and then a total deposit. Used to balance the different payment methods to the cash drawer at the end of the day.

Cashout by Practitioner Detailed
Payment totals by practitioner for a selected date range. Listed by practitioner, and patient, displaying cash, cheques, totals under cards (Visa, M/C, Debit, Other), TelePlan, and NSF cheques. Used to balance the different payment method types to the cash drawer at the end of the day.

Charges & Receipts Audit by Clinic

Charges and receipts clinic totals for each date within the date range. Lists each date and within those days, insurance fee/pay & A/R change, patient fee/pay & A/R change, third party fee/pay & A/R change, total fee/pay and A/R change, total deposit, refund NSF, and visits. Totals till to cash, cheque, debit, Visa, M/C, InsCheque, 3rdcheque, and other. Will list total deposit of cash, cheque, cards, and TelePlan.

Charges & Receipts Audit by Practitioner
Charges and receipts practitioner totals for each date within the date range. Lists each date and within those days, insurance fee/pay & A/R change, patient fee/pay & A/R change, third party fee/pay & A/R change, total fee/pay and A/R change, total deposit, refund NSF, and visits. Totals till to cash, cheque, debit, Visa, M/C, InsCheque, and other. Will list total deposit of cash, cheque, cards, and TelePlan. Also lists visits billed this period, visits billed in another period, patients billed this period, new patients this period, patient average visit, average fee, average patient fee.

Chart Header
Patient information will be printed at the top of a chart page. Displays patient name, chart number, address, phone numbers, DOB, age, gender, marital status, occupation, registration date, PHN, and referral.

Clinic Accounting Report
Accounting report for revenue and taxes for the selected date range. Displays product, insurance, patient, 3rd party, taxable amount, and GST. Clinic totals only.

Clinic Accounts Receivable (Insurance)
Clinic accounts receivable report for patient outstanding amounts. Balance is as of print time. Displays patient, current, over 30, over 60, over 90, balance. Can be run for a single practitioner or multiple practitioners. Double clicking a patient name will bring up the transactions for them.

Clinic Accounts Receivable (Patient)
Patient accounts receivable report for patient outstanding amounts. Lists patient name, chart number, phone number, current, over 30, over 60, over 90, balance. Double clicking on the patient will bring up the transactions for that patient. Balance is as of print time, total is clinic wide.

Clinic Accounts Receivable (Third Party)
Clinic accounts receivable report for third part outstanding amounts. Displays patient, current, over 30, over 60, over 90, balance. Double clicking on a patient name will bring up the transactions for them. Balance is as of print time. Displays clinic totals at end.

Clinic Billing by Age Group
Amount of fees billed, organized by age group with the date range. Displays quantity, description, visits, insurance, patient, 3rd party, and total.

Clinic Daily Charges & Receipts

Displays charges and receipts by transaction date, clinic totals only. Shows insurance fee/pay totals, patient fee/pay totals, 3rd party fee/pay totals, patient visits billed, cash/cheque/InsCheque in till, cards, total deposit totals, and clinic totals for all practitioners billed that day. Can be used with a date range or by single day.

Clinic Daily Charges & Receipts Detailed
Displays charges and receipts by transaction date. Shows patient name, ICD, prefix, code, description, Insurance fee/pay by transaction, Patient fee/pay by transaction, 3rd party fee/pay by transaction, payment, visit date. Visits billed on a different date will be included in the visit count only (detailed).

Clinic Insurance Accounts Receivable
Accounts receivable report for insurance outstanding amounts. Displays patient, current, over 30, over 60, over 90 and balance. Double clicking on a patient name will bring up the transactions for them. Balance is as of print time. Can be run for one practitioner or multiple practitioners.

Clinic Patient Accounts Receivable
Patients accounts receivable report for patient outstanding amounts, clinic wide. Displays patients, chart number, phone number, current, over 30, over 60, over 90, balance. Balance is as of print time. Summarizes totals at end.

Clinic Production Report
Production report for revenue and taxes. Can be run for a selected date range, for a selected practitioner, or multiple practitioners. Lists quantity billed, description, visits, insurance, patient, 3rd party, taxable amount, GST. Double clicking on an item will bring up all the transactions for that item within the date range. Lists clinic totals for x practitioners, as well as taxable amount, GST and PST totals.

Clinic Production with GP
Production report with gross profit, revenue, and taxes for clinic. Double clicking on a fee code will bring up all the transactions for that code. Displays quantity, description, visits, insurance, patient, 3rd party, taxable amount, PST, GST. Also displays cost, G/P, and G/P%. Displays summary MSP, ICBC, WCB, and other. Summarizes Insurance, Patient, and 3rd party.

Clinic Production with GP Summary
Production report with GP, revenue, and taxes for clinic. Has quantity, description, visits, insurance, patient, 3rd party, taxable amount, PST, and GST. Also lists cost, G/P, G/P %. Can be run per day or date range.

Clinic Referring Doctors Report
List of doctors who have referred patients to this clinic. Use the date range to select the date the new patient files were created.

Clinic Sales & Taxes
Displays clinic sales, taxable sales, GST and PST. Can be used for a single date, or within a date range.

Clinic Sales with GP
Displays clinic sales with gross profit. Shows quantity, description, visits, patient, other, taxable amounts PST and GST. Also lists cost, gross profit, and gross profit %. Double clicking on an item or amount will bring up all the transactions for that item. Summarized at end with patients with transactions, patient visits, revenue, collections, A/R change, cost of goods, gross profit, and gross profit %. Grouped by categories 0-9, 10-19, 20-39, 40-89, 90-99.

Clinic Sales with GP Summary
Clinic sales report totalling visits, patient, other, taxable amount, PST, GST. Also totals cost, gross profit, and gross profit %. Summarized at end with patients with transactions, patient visits, revenue, collections, A/R change, cost of goods, gross profit, and gross profit %. Subtotal grouped by categories 0-9, 10-19, 20-39, 40-89, 90-99.

Clinic Third Party Accounts Receivable
Accounts receivable report for third party outstanding amounts. Displays patient, current, over 30, over 60, over 90, balance. Separated by third party insurance company. Double clicking a patient name will bring up the transactions for them. Balance is as of print time. Can be run for one practitioner or multiple practitioners.

Daily Charges & Receipts
Daily charges and receipts by transaction date. Can be run by date or for a date range, for one practitioner or for multiple practitioners. Lists patient name, ICD, prefix code, description, insurance fee/pay, patient fee/pay, 3rd party fee/pay, payment type, visit date. Summarizes till with cash, cheque, InsCheque, debit, visa, M/C, and total deposit in cash, cheque, cards, and TelePlan. Visits billed on a different date will be included in the visit count only. Patients listed in order they were billed. Last page of report lists clinic totals for all practitioners.

Daily Charges & Receipts – No Order
Daily charges and receipts, in no order. Can be run by date or for a date range, for one practitioner or for multiple practitioners. Lists patient name, ICD, prefix code, description, insurance fee/pay, patient fee/pay, 3rd party fee/pay, payment type, visit date. Summarizes till with cash, cheque, InsCheque, debit, visa, M/C, and total deposit in cash, cheque, cards, and TelePlan. Visits billed on a different date will be included in the visit count only. Patients listed in order they were billed. Last page of report lists clinic totals for all practitioners.

Daily Charges & Receipts by LoginID
Daily charges and receipts by transaction date, by loginID. Can be run by date or for a date range, for one practitioner. Lists patient name, Inv #, prefix code, description, insurance fee/pay, patient fee/pay, 3rd party fee/pay, payment type, visit date. Shows till amount in cash, cheque, InsCheque, cards, total deposits of cash, cheque, cards, TelePlan. Visits billed on a different date will be included in the visit count only, and patients are listed in order of payment method. Last page of report lists clinic totals for all practitioners.

Daily Charges & Receipts Detailed
Daily charges and receipts detailed. Can be run by date or for a date range, for one practitioner or

for multiple practitioners. Lists patient name, ICD, quantity, prefix, code, description, insurance fee/pay, patient fee/pay, 3rd party fee/pay, payment type, visit date. Summarizes till with cash, cheque, InsCheque, debit, visa, M/C, and total deposit in cash, cheque, cards, and TelePlan. Visits billed on a different date will be included in the visit count only. Patients listed in payment method order. Last page of report lists clinic totals for all practitioners.

Daily Charges & Receipts Detailed – No Order
Daily charges and receipts detailed, in no order. Can be run by date or for a date range, for one practitioner or for multiple practitioners. Lists patient name, ICD, quantity, prefix, code, description, insurance fee/pay, patient fee/pay, 3rd party fee/pay, payment type, visit date. Summarizes till with cash, cheque, InsCheque, debit, visa, M/C, and total deposit in cash, cheque, cards, and TelePlan. Visits billed on a different date will be included in the visit count only. Patients listed in order they were billed. Last page of report lists clinic totals for all practitioners.

Daysheet
One to five column appointment listing by day, organized by time slots (broken up by hour) and room number, if applicable. Lists patient, reason for visit. Can be run for a single practitioner or multiple practitioners.

Daysheet- Advanced
One to five column appointment listing by day, organized by time slot and room number. Lists patient, reason for visit. Can be run for a single practitioner or multiple practitioners.

Daysheet – Landscape
One to eight column appointment listing by day, organized by time slots (broken up by hour) and room number, if applicable, and notes. Lists patient, reason for visit. Can be run for a single practitioner or multiple practitioners.

Daysheet Shade 10-40
One to five column appointment listing by day, organized by time slots (broken up by hour) and room number, if applicable. Lists patient, reason for visit. Can be run for a single practitioner or multiple practitioners. Prints with a shaded line at 10 and 40 minutes.

Daysheet AM
One to five column appointment listing by day, organized by time slots (broken up by hour) and room number, if applicable. Lists patient, reason for visit. Can be run for a single practitioner or multiple practitioners. AM appointments only.

Daysheet PM
One to five column appointment listing by day, organized by time slots (broken up by hour) and room number, if applicable. Lists patient, reason for visit. Can be run for a single practitioner or multiple practitioners. PM appointments only.

Daysheet Toner Saver
One to five column appointment listing by day, organized by time slots (broken up by hour) and

room number, if applicable. Lists patient, reason for visit. Can be run for a single practitioner or multiple practitioners. Toner saver version.

Daysheet with Phone Numbers
One to five column appointment listing by day, organised by time slot and room number, broken up by hour. Lists patient name, phone, and reason for visit. Can be run for a single practitioner or multiple practitioners.

Deleted Appointments
Report of deleted appointments within a date range or by date. Lists date, time, patient, phone, status, reason, created, edited. Can be run for a single practitioner or multiple practitioners.

Deleted Ledger Entries
Displays deleted ledger entries for a date or a date range, by practitioner. Shows patient name, date deleted, prefix code, description, fee, pay, payment type, visit date, created by, and edited by. Shows summarized totals for till in cash, cheque, InsCheque, 3rdcheque, debit, visa, M/C, and other.

Dot Matrix 5.5" Receipt
Dot matrix receipt used by template billing. Shows clinic name, address, phone number, date, description, fee, payments, practitioner name and number, patient name and address.

Dot Matrix Receipt
Dot matrix receipt used by template billing. Shows clinic name, address, phone number, date, description, fee, payments, practitioner name, patient name and address.

Extended Statement
Extended statement for the selected patient for all visits within the date range. Can be run for a single practitioner or multiple practitioners, a single date or a date range. Displays practitioner name & registration number, clinic name and address and phone number, date of printing, patient name and address, chart number, PHN. Transactions show practitioner, date, fee code, description, fee, payment, and paid. Summarizes all payments at the end.

Extended Statement – Detailed
Detailed extended statement for the selected patient. Shows all fees billed within the selected date range. Can be used for one practitioner or multiple practitioners. Displays practitioner, date, ICD 9, Fee Code, description, fee, payment, paid.

Family Statement (detailed)
A/R statement with transaction details for all family member of the selected patient. Balance is as of "To" date selected. Member ID must be completed in all family members. Displays clinic name and address with phone number, today's date, patient name and chart number, address, phone number. Shows Invoice #, date, description, amount, paid/applied, balance. Shows current/over30/over 60/over 90/balance.

Fee Price List

Fee price list showing balance on hand, min and max for inventory items and items that are taxable. Shows product code, description, bill to, category, insurance fee, patient fee, and tax.

File Pull List
Appointment list by day for each practitioners appointments with the default practitioner shown. Shows practitioner name, time, patient name, age, last visit, phone, and reason.

Future New Patients Booked
Displays new patients booked on scheduler within the selected date range. These patients do not yet have a chart number. Grouped by practitioner. Displays date, time, name, phone, reason. Can be run for single practitioner or multiple practitioners, one day or a date range.

General Ledger Daily Posting by Practitioner
Summary of fees, payments, and payment methods for each practitioner. Daily GL posting needed for accounting system.

General Ledger Posting by Clinic
Summary of fees, payments, and payment methods for clinic. Daily GL posting needed for accounting system.

General Ledger Posting by Practitioner
Summary of fees, payments, and payment methods for each practitioner. GL posting needed for accounting system.

Group Daysheet
One to five column appointment listing by day, organized by time slots and with practitioner/room numbers along column headings. Can be used for multiple practitioners on the same page. Prints in portrait.

Group Daysheet 14 Inch
One to nine column appointment listing by day, organized by time slots and with practitioner/room numbers along column headings. Can be used for multiple practitioners on the same page. Prints in landscape.

Group Daysheet Landscape
One to seven column appointment listing by day, organized by time slots and with practitioner/room numbers along column headings. Can be used for multiple practitioners on the same page. Prints in landscape.

Held Claims
Held claims by practitioner within the selected date range. Shows date range, chart number, patient name, transaction, service, bill to, fee billed, amount, and practitioner total.

Historical AR Details
Accounts receivable as it was on a historical date. Use the “To” date field to specify the historical date. Displays historical date, practitioner name, patient name and chart number,

insurance, patient, third party, and total. Displays all totals at the end.

Historical AR Summary
Accounts receivable summary as it was on a historical date. Use the “To” field to specify the historical date. Organized by practitioner, displays totals with insurance, patient, third party, and total of all three.

ICBC First Report
ICBC first report printed from patient forms history.

ICBC Health Provider Invoice- All
Invoice for services billed to ICBC. All patients with ICBC billings in the selected date range will be included. Shows account number, invoice number, invoice date, supplier name, supplier contact, supplier phone number, ICBC claim number, client first name, client last name, Date of MVA, client PHN, ICBC contact, ICBC address, city, postal code. Shows Time Charges with service description and name of therapist, service code, hours/session, rate, amount, performed by MSP practitioner #, specialty type, service date, referred by MSP practitioner #. Also shows Expenses and Disbursements with description, service code, quantity, rate, amount, specialty type, date. Shows Invoice total, prior amount billed to date, and total billed.

ICBC Health Service Invoice – SP
Invoice for services billed to ICBC for the selected date range only for the selected patient. Shows account number, invoice number, invoice date, supplier name, supplier contact, supplier phone number, ICBC claim number, client first name, client last name, Date of MVA, client PHN, ICBC contact, ICBC address, city, postal code. Shows Time Charges with service description and name of therapist, service code, hours/session, rate, amount, performed by MSP practitioner #, specialty type, service date, referred by MSP practitioner #. Also shows Expenses and Disbursements with description, service code, quantity, rate, amount, specialty type, date. Shows Invoice total, prior amount billed to date, and total billed.

ICBC Health Service Provider Invoice
Invoice for services billed to ICBC for the selected date range. Shows account number, invoice number, invoice date, supplier name, supplier contact, supplier phone number, ICBC claim number, client first name, client last name, Date of MVA, client PHN, ICBC contact, ICBC address, city, postal code. Shows Time Charges with service description and name of therapist, service code, hours/session, rate, amount, performed by MSP practitioner #, specialty type, service date, referred by MSP practitioner #. Also shows Expenses and Disbursements with description, service code, quantity, rate, amount, specialty type, date. Shows Invoice total, prior amount billed to date, and total billed.

Insurance Accounts Receivable
Accounts receivable report for insurance outstanding amounts. Can be run for a single practitioner or multiple practitioners. Displays patient, current, Over 30, Over 60, Over 90, Balance.

Insurance Accounts Receivable Details

Insurance accounts receivable details report for patient outstanding amounts for the selected date range. Balance is as of “To” date. Displays patient (with treatments), current, over 30, over 60, over 90, balance. Subtotalled by practitioner, with a grand total for the clinic. Can be run for one practitioner or multiple practitioners.

Inventory – Description Order
List of inventory items, cost and price column. In order of description. Shows item, description, vendor, cost, sell, and notes.

Inventory Evaluation
Value of inventory at the time the report was printed. Shows item, description, vendor, balance on hand, cost, value, notes.

Inventory Evaluation – Description Order
Value of inventory at the time the report was printed. In order of description. Shows item, description, vendor, balance on hand, cost, value, sell, notes.

Inventory Evaluation by Vendor
Value of inventory at the time that the report was printed. Printed in vendor order. Displays item, description, balance on hand, cost, value, notes.

Inventory Labels-5160
Prescription labels for Avery Labels 5160. Prints prescription labels from the invoicing screen with information entered in the notes field for the item billed.

Inventory List
List of inventory items with balance on hand, min and max at print time. Cost and price column included. Can be used to count inventory. Shows item, description, vendor, cost, sell, min, max, balance on hand, count, and check.

Inventory List – Description Order
List of inventory items with balance on hand, min and max at print time. Cost and price column included. Can be used to count inventory. In order of description. Shows item, description, vendor, cost, sell, min, max, balance on hand, count, and check.

Inventory Notes
Inventory receipts report showing quantity and value of product received for each vendor’s invoice. Shows item number, description, notes.

Inventory Price List
Inventory price list shows sell, cost, unit & tax status for Inventory items grouped by category. Shows item, description, sell, cost, unit, and today’s date.

Inventory Receipts
Inventory receipts report showing quantity and value of product received for each vendor’s invoice. Shows quantity, item, cost, amount, mark-up, and sell price.

Inventory Receipts History
Inventory receipts report showing quantity and value of product received for each vendor on each day in the selected date range. Shows current balance on hand. Displays vendor, received, item, cost, amount, balance on hand.

Inventory Receipts History with BOH
Inventory receipts report showing quantity and value of product received for each vendor on each date in the selected date range. Shows current balance on hand. Displays vendor, received, item, cost, amount, balance on hand.

Inventory Receipts with BOH
Inventory receipts report showing quantity and value of products received for each vendor's invoice. Shows quantity, item, cost, amount, mark-up, sell price, balance on hand.

Invoice List
List of invoices for the selected date range. Shows invoice #, transaction, service, patient with chart number, fee, payment.

Laser Invoice – Short No Pract No
Half page laser invoice. No practitioner number on receipt. Shows clinic name, practitioner name, clinic address and phone number as well as website, today's date, invoice number, chart number, patient name and address, description of treatment as well as date, amount and payment. Shows GST, PST, total, and paid at bottom.

Laser Invoice – 93mm
Third page laser invoice used by template billing. Shows clinic name, practitioner name and registration number, clinic address and phone number, clinic website and practitioner email. Displays today's date, invoice number, patient name and chart number. Transactions include description, date, amount, payment, GST (includes GST number) total, paid, and balance due.

Laser Invoice – 93mm Landscape
Half page laser invoice used by template billing. Group by category. Print next appointment for any practitioner in the clinic.

Laser Invoice – A
Half page laser invoice used by template billing. Group by category. Print next appointment for any practitioner in the clinic. Shows clinic name, practitioner name and registration number, clinic address and phone number as well as website, today's date, invoice number, chart number, patient name and address, description of treatment as well as date, amount and payment. Shows GST, PST, total, and paid at bottom.

Laser Invoice – A5
Half page laser invoice formatted for A5 paper size (8.5 x 5.5 landscape). Shows clinic name, practitioner name and registration number, clinic address and phone number as well as website, today's date, invoice number, chart number, patient name and address, description of treatment

as well as date, amount and payment. Shows GST, PST, total, and paid at bottom.

Laser Invoice – Double
Half page laser invoice. Two copies printed on one page. Shows clinic name, practitioner name and registration number, clinic address and phone number as well as website, today’s date, invoice number, chart number, patient name and address, description of treatment as well as date, amount and payment. Shows GST, PST, total, and paid at bottom.

Laser Invoice – Full Page
Full page laser invoice. Shows clinic name, practitioner name and number, clinic address and phone number, clinic website, today’s date, invoice number, GST number, chart number and patient name and address with phone number. Transactions include quantity, description, price, unit, amount, subtotal, GST, PST, total, cash, total balance or balance due. Also shows practitioner email at bottom.

Laser Invoice-Short
Half page laser invoice. Displays clinic name, practitioner name and number, clinic address and phone number, clinic website, today’s date, invoice number, GST number, chart number and patient name and address with phone number. Transactions include quantity, description, amount, payment, GST, PST, total, paid or balance due, and account balance.

Laser Invoice – Short w/credit
Half page laser invoice. Shows a credit balance on account. Shows clinic name, practitioner name and registration number as well as email, clinic address and phone number as well as website, today’s date, invoice number, chart number, patient name and address, description of treatment as well as date, amount and payment. Shows GST, PST, total, paid, balance due, and account balance at bottom.

Laser Invoice – Standard
Full page laser invoice. Displays clinic name, practitioner name and number, clinic address and phone number, clinic website, today’s date, invoice number, GST number, chart number and patient name, address and phone number. Transactions show quantity, description, price, unit, amount, subtotal, GST, PST, total, cash, account balance. Also displays practitioner email address at bottom.

Maintenance Statement
Extended maintenance statement for the selected patient. Uses the “patient fee” amount in Patient Other Info to divide the number of visits in the date range to determine Visit value. “Free Patient Fee” in Patient Info must be check marked. Displays practitioner name, clinic name, address and phone number, today’s date, patient name, chart number, PHN, and address. Transaction details include practitioner name, date of service, code, description, fee, and payment.

Monthly Charges & Receipts
Monthly charges and receipts for a date range by transaction date. Can be run for a single practitioner or multiple practitioners. Segmented by date, displays patient name, ICD, prefix code, description, Insurance fee/pay, patient fee/pay, 3rd party fee/pay, payment and visit date. Double clicking on a line will bring up the transactions for it. Clinic totals listed at the end.

MSP Patient List
List of MSP patients with number of visits used. Patients with their last visit date within the selected date range will be displayed. Leaving the From date blank will select all patients. Displays patient name, address, phone, work phone, last visit date, and MSP visits used. Can be run for a single practitioner or multiple practitioners.

Name Slide
Name slide for selected patient, intended to be printed on a cardboard name slide and slid into a plastic file sleeve. Displays patient name and chart number.

New Patient 4 Label Set (center print)
Prints address label, two patient labels and referral address label. Uses Avery 2160 label set. Fee through center of the printer input tray. Displays Patient name, phone number, referral information.

New Patient 4 Label Set (side print)
Prints address label, two patient labels, and referral address label. Uses Avery 2160 label set. Must be fed through side of printer input tray. Prints patient name and address, as well as phone number and referred by.

New Patient 9 Label Set (dymo)
Prints 6 patient chart labels, 1 file label, 1 x-ray label, and 1 address label for Dymo label printer. Shows patient name, chart, address, phone number, DOB, age, gender, print date.

New Patient Chart Label (center print)
Prints one patient label using Avery 2160 label set. Must be fed through center of printer input tray. Displays patient name, chart number, phone number, DOB, and referred by.

New Patient Chart Label (dymo 1x3.5)
Patient chart label for Dymo label printer. Displays patient name and chart number, DOB, gender, phone number, occupation, date of printing.

New Patient Chart Label (side print)
Prints one patient label on Avery 2160 label. Must be fed through the side of the printer input tray. Displays patient name, chart number, phone number, DOB, and referred by.

New Patient Exam Form
Fills in patient name, age, occupation, referring doctor and today’s date on Physio examination form.

New Patient Input Form
Lists patient name, chart number, PHN, registration date, bill to, DOB, age, gender, address, phone, referral information, claim #, injury date, end date, adjuster, occupation, occupation address, health history, medications, x-rays, assessment, clinic name/address/phone at bottom of page. Also shows diagram of human body, front and back, for assessment purposes.

New Patient Label Set (dymo 1x3.5)
Patient file cover label, file tab label, and chart label set for Dymo label printer. Displays patient name, address, DOB, and phone number.

New Patient Referrals
List showing how many patients have been received from each referral. Lists practitioner name, patient name and address, gender/age/DOB/phone/PHN, referral, notes. Can be run for a single practitioner or multiple practitioners, a single date or a date range.

New Patient Report
Displays new patient report with referral information. Shows patient name, address and phone, gender/age/DOB, referral, notes. Can be run for one practitioner or multiple practitioners, for a single date or a date range.

New Patient Sheet
Lists patient name, chart number, address, phone number, work number, DOB, PHN, gender, registration date, referral, occupation and occupation address.

Open Orders
List of open orders for the date range selected. Displays order number, quantity, item number, price, amount.

Out of Stock Inventory
List of inventory that is at or below zero balance on hand. Shows item number, description, vendor, balance on hand, notes.

Patient 3rd Party Statement (Detailed)
3rd party A/R statement with billing and payment transaction details for the selected patient. Input a date range to select transactions to include on the statement. Shows clinic name and address, practitioner name and number, clinic phone number, GST number. Shows today's date, bill to, patient name and address as well as phone number, group, and policy. Transactions show invoice number, date, ICD9, Description, tax, amount, balance. Shows current/over 30/over 60/over 90/balance.

Patient 3rd Party Statement (Outstanding)
3rd party A/R statement with billing and payment transaction details for the selected patient. Use date range to select transactions to show on the statement. Displays clinic name, address and phone number, today's date, 3rd party bill to, patient name, chart number and address as well as phone numbers, group and policy number. Transactions include inv #, date, ICD9, description, tax, amount, balance. Shows current/over 30/over 60/over 90/balance at bottom.

Patient Accounts Receivable
Shows patient outstanding amounts as of print date. Subtotal by practitioner, grand total for clinic. Displays patient, phone number, current, over 30, over 60, over 90, balance. Double clicking a patient name will bring up the transactions for the patient.

Patient Accounts Receivable Details
Shows patient outstanding amounts for date range. Balance as of "To" date. Subtotalled by practitioners, showing grand total for clinic. Displays patient, current, over 30, over 60, over 90, balance. Double clicking a patient name will bring up the transactions for that patient. Can be run for a single practitioner or multiple practitioners.

Patient Address Label
Will print patient address label Avery 2160 for the selected patient. Use skip # of labels to skip labels already used on the sheet. Will display patient name and address.

Patient Address Label – 2160
Patient address label for Avery 2160 labels. Use skip # of labels to skip labels already used on the sheet. Displays patient name and address.

Patient Address Label – 5160
Prints Avery label 5160 (3x10) for all patients whose last visit is within the selected date range. Will print patient name and address.

Patient Address Label – (Dymo 1x3.5)
Patient address label for dymo label printer. Shows patient name and address.

Patient Birthday List
Lists patient birthdays for the selected date range. Patients whose last visit was more than two years ago will not be included. Organized by practitioner, lists patient name, address, birthday, last visit, and group.

Patient Card
Patient name, chart, phone numbers, birthday, gender, registration date, occupation, and referral.

Patient Chart Header (name and chart #)
Name and chart number to print on the top center of a patient chart.

Patient Chart Label – 5160
Patient chart label Avery 5160 for the selected patient. Use skip # of labels to skip labels already used on the sheet. Displays patient last name, first name, DOB, gender, and chart number.

Patient Chart Label (dymo)
Patient chart label for dymo laser printer. Displays patient last name, first name and chart number, address, phone, DOB, age, gender, and date of printing.

Patient Chart Label QL-550
Patient chart label for Brother Label Printer.

Patient Chart List
List of patient names, chart numbers and birthdates. Select last visit range by using date range.

Patient City Listing
Lists city, number of patients per city, percentage of total. Use date range to select patients by last visit. Leaving the date range blank will select all patients.

Patient Collection
Collection report for patients with outstanding amounts. Credits are ignored. Balance is as of print time. Can be run for a single practitioner or multiple practitioners. Subtotalled by practitioner, with a grand total for clinic.

Patient Email List
List of patient email addresses. Use date range to select patient by last visit date. Leaving the date range blank will select all patients.

Patient Envelope (left print)
Envelope for patient list report. The same selection criteria must be selected as for the Patient List Report to get the same patients. Envelopes must be fed through the side of the printer. Prints practitioner information and address at top left of envelope, patient name and address in the To field on envelope.

Patient Envelope (center print)
Envelope for patient list report. The same selection criteria must be selected as for the Patient List Report to get the same patients. Envelopes must be fed through the center of the printer. Prints practitioner information and address at top left of envelope, patient name and address in the To field on envelope.

Patient Exam (Name & DOB)
Patient name and birthdates to print on the top center of a patient exam.

Patient Examination Form
Lists patient name, address, phone, PHN, birthday, chart number on examination form.

Patient File Label – 5160
Patient file label – Avery 5160 for the selected patient. Use skip # of labels to skip labels already used on the sheet. Displays patient last name, first name and chart number.

Patient File Label – 5366
Patient file label – Avery 5160 for the selected patient. Use skip # of labels to skip labels already used on the sheet. Displays patient last name, first name and chart number.

Patient File Label (dymo)
Patient file label for Dymo label printer. Displays patient name and chart number.

Patient File Label Set (dymo 1x3.5)
Patient file cover label and file label set for the Dymo label printer. Displays patient last name, first name, address, DOB, and phone number.

Patient File Name Label – 5160
Patient file name label for Avery 5160 for the selected patient. Use skip # of labels to skip labels already used on the sheet. Displays patient name.

Patient Follow Up Label 5160
Avery 5160 (3x100 labels for the patient follow up report. The same criteria must be specified in order to get the same patients. Use skip 3 of labels to indicate the number of labels already used on the sheet.

Patient Follow Up
Lists patient name and address, phone number, work phone, level, last visit, recall, and displays notes from the patient information screen. Selects patients with last visits within the date range. Patients with future recall, future appointment, deceased, archive, or inactive status will be ignored.

Patient Follow Up Envelope
Envelope for patient follow up report. The same selection criteria must be selected in order to list the same patients. Envelopes must be fed through the center of the printer with the stamp area first.

Patient Information Sheet
Sheet for pasting onto a file folder. Includes file label and x-ray label. Displays patient name and chart number, PHN and bill to, registration date, DOB, age, gender, address and phone numbers, referral, MD, claim number, injury date, end date, adjuster, occupation, and address.

Patient Insurance Statement (Detailed)
Insurance A/R statement for the selected patient with transaction details, balance is as of “To” date selected. Displays clinic name, address and phone number, today’s date, patient name, chart number, address and phone number. Transaction details include invoice #, date, description, amount, paid/applied, balance. Shows current/over 30/over 60/over 90/balance at bottom.

Patient Label – 2160
Patient address label for Avery 2160. Use skip # of labels to skip labels already used on the sheet. Displays patient name and address.

Patient Label (QL-550) 62mm
Patient label for Brother QL-550 with 62mm roll. Displays patient name, chart number, address, gender, age, DOB, PHN, phone number.

Patient Label Set (dymo 1x3.5)
Patient file cover label, file tab label and x-ray label set for Dymo printer. Displays patient name and chart number, DOB, age, and phone number.

Patient Label Set 2 (dymo 1x3.5)
Two patient file cover labels for dymo label printer. Displays patient last name, first name, chart number, DOB, age, and home phone.

Patient Last X-Ray
Shows date of the last x-ray. Using the date range will select those patients who had an x-ray within the date range. Shows patient name, chart number, home phone, work phone, other phone, last visit, last x-ray.

Patient Ledger
Patient ledger printout for the selected patient. Displays all visits for the selected date range. Totals fee and payment columns separately. Displays service date, transaction date, practitioner number, method, quantity, code, insurance fee/payment, patient fee/payment, 3rd party fee/payment. Displays patient name, chart number, and date of printing on top.

Patient Ledger with Notes
Patient ledger printout with notes for the selected patient. Displays all visits within the selected date range. Totals fee and payment columns separately. Displays Service date, transaction date, practitioner number, invoice number, quantity, service, patient fee, patient payment, and notes/labels. Displays patient name, chart number, and date of printing on top.

Patient Address Label
Prints Avery label 5160 (3x10) for the selected patient whose last visit is between the selected dates for the selected practitioner. Patients with a status of archived, deceased, moved or have an incomplete address will be ignored. Displays patient name and address.

Patient List Address Label – 5160
Avery label 5160 (3x10) for all patients whose last visit was between the selected date range for the selected practitioner. Patients who a status of archived, deceased, moved or have incomplete address will be ignored. Displays patient name and address.

Patient List Envelope
Envelope for patient list report. The same selection criteria must be selected in order to list the same patients. Envelopes must be fed through the center of the printer with the stamp area first.

Patient List Envelope (centre print)
Same criteria as Patient List Envelope, with center print display on envelope.

Patient List Envelope (side print)
Envelope for patient list report. Same selection criteria must be selected as the report in order to get the same patients. Envelopes must be fed through side of printer.

Patient Mailing List
Patient mailing list including all patients who have seen the selected practitioner or have the selected Practitioner set as the default practitioner. Can be used for a single date or a date range, one practitioner or multiple practitioners. Using date range will select all patients who had a last visit within that date range. Lists patient name, address and phone, and last visit date. Can be printed as the list itself and it also creates a mail merge file named after the practitioner, and is placed in C:\ClinEsse.

Patient Mailing List for Practitioner
Patient mailing list for all patients that have seen the selected practitioner. Use the date range to select by Last Visit Date. Shows print date, date range, name, address/phone, last visit date. Groups patients by status. Can be run for multiple practitioners.

Patient Mailing List with Chart
Patient mailing list including all the patients that have seen the selected Practitioner or have the selected Practitioner set as the default Practitioner. Use the date range to select by Last Visit. Shows print date, date range, Name, Chart number, Address/Phone, and Last Visit date. Patients organized by status.

Patient Mva Label Set (dymo 1x3.5)
Patient file cover label, file tab label.

Patient Purchase History
Prints purchase history of the selected patient. Displays all items purchased and fees charged. Can be used for any selected date range.

Patient Recall Label 5160
Avery 5160 (3x10) labels for the recalls selected. Use skip # of labels to determine where to start on the sheet if some labels have already been used on the sheet. Displays patient name and address.

Patient Recall Label 5161
Avery 5161 (2x10) labels for the recalls selected. Use skip # of labels to determine where to start on the sheet if some labels have already been used on the sheet. Displays patient name and address.

Patient Recall Label 5162
Avery 5162 (2x7) labels for the recalls selected. Use skip # of labels to determine where to start on the sheet if some labels have already been used on the sheet. Displays patient name and address.

Patient Recall Letter
Recall letter for patient recalls within the selected date range. Patients with future appointments are not printed unless “Print Regardless” has been checked on that patient.

Patient Recall Letter Envelope

Envelope for Patient Recall Letter reports. Same criteria must be used for the report as for the envelope in order to print the same patients. Envelopes must be fed through the center of the printer with the stamp are first.

Patient Reminder
Letter to patient regarding an appointment. Use the date range to select the appointment for the note to refer to. Will display for the currently selected patient. Shows clinic name and address, date, phone number, and body of letter. Is editable.

Patient Statement
A/R statement for the selected patient, balance is as of the “To” date. Displays clinic name address and phone number, today’s date, patient name chart number and address as well as phone number. Transactions include inv #, date, description, amount, paid/applied, balance. Shows current/over 30/over 60/over 90/balance at bottom.

Patient Statement (Detailed)
Displays A/R statement with transaction details for the selected patient. Balance is as of the “To” date selected. Displays clinic name and address and phone number, date of printing, patient name and chart number, address and phone number. Transactions show invoice number, date, description, amount, paid/applied, balance. Will show current/over 30/over 60/over 90/balance at bottom.

Patient Statement (detailed) With Interest
A/R statement for the selected patient with transaction details. Balance is as of the “To” date selected. Interest calculated at 1% per month for items billed more than 30 days ago. Displays clinic name address and phone number, today’s date, patient name chart number and address as well as phone number. Transactions include inv #, date, description, amount, paid/applied, balance. Shows current/over 30/over 60/over 90/balance at bottom as well as interest charge.

Patient Travel Card
Shows patient name, address, DOB, gender, occupation, phone numbers, and referrals on travel card.

Patient Treatment Card
Fills patient name, address, DOB, occupation, phone numbers, and referrals on treatment card.

Patient Un-applied Credits
Patient unapplied credit report for patients with a negative balance; balance is as of print time. Subtotalled by practitioner, grand total for clinic. Displays patient name, chart number, phone number, current, over 30, over 60, over 90, balance. Can be run for one practitioner or multiple practitioners.

Patient Un-applied Records
All patient billings and payments not yet applied. Shows patient name, chart number, service, patient debit, patient credit. Grouped by practitioner, sorted by patient. Can be run for one practitioner or multiple practitioners.

Patient Unique Address Envelope
This report will look for non duplicate addresses in all the patients that have seen the selected practitioner. Only the oldest patient will be printed. Any patients with their last visit date within the selected date range will be printed.

Patient Unique Address List
This report will look for non duplicate addresses in all the patients who have seen the selected practitioner. Only the oldest patient will be printed. Any patient with their last visit date within the selected date range will be printed.

Patient Vertical Treatment Card
Fills in patient name, address, phone numbers, DOB, and practitioner name. Prints vertically.

Patient Vial Label
Patient vial label for Brother QL-550 label printer. Displays patient last name, first name, DOB, item, and date of printing.

Patients with Blank Email
List of Patient who have a blank Email address. Use date range to select patients by last visit. Leave the From date blank to select all patients.
Shows name, Address, Last Visit, Email Address.

Patient Ws Label Set (dymo 1x3.5)
Patient file cover label, file tab label, and x-ray label set for Dymo label printer. Displays patient name, chart number, DOB, age, gender, date of printing, and phone number.

Patient X-Ray Labels
Patient x-ray labels intended to be burned onto the x-ray and pasted onto the envelope. Displays clinic name and address, patient name and chart number, date of printing, DOB, and practitioner.

Patient X-Ray Label (dymo 1x3.5)
Patient x-ray label for Dymo label printer. Displays clinic came, patient name and chart number, DOB, age, gender, and date of printing.

Patient X-Ray Label (dymo)
Patient X-Ray label for Dymo label printer. Displays clinic name, address, patient name and chart number, date of printing, DOB, age, and phone number.

Patient X-Ray Label (laser)
Patient x-ray labels intended to be burned onto the x-ray and pasted onto envelope. Displays patient last name, first name and chart number, date of printing, DOB, age, gender, practitioner name and address.

Patient X-Ray Label (p-touch)
Patient x-ray label for Brother P-Touch label printer. Displays clinic name and address, patient

name and chart number, date of printing, DOB, age, gender, and phone number.

Patient X-Ray Label
Patient X-Ray label intended to be burned onto the X-ray and pasted onto envelope. Displays clinic name and address, patient name, chart number, DOB, date of printing, gender, age, and practitioner. Will display the currently selected patient.

Patient X-Ray Labels – 1 1/8 margin
Patient X-Ray Labels intended to be burned onto the X-Ray and pasted onto envelope. 1 1/8" Margin.

Patients by Postal Code
Patients listed per city and sorted by postal code. Can be run for any date range selected- patients with last visit within date range will be shown. Leave the From date blank to select all patients. Displays city, name, number of patients, percentage of total, postal code.

Patients by Treatment Area
Number of patients per treatment area (ICD9 code). Only patients with last visit date within the selected date range will be selected. Displayed in coloured bar graph.

Patients with One Visit
Displays patients who have had only one visit within the selected date range. Can be run for any selected date range, one practitioner or multiple practitioners. Displays chart number, patient name, visit date, phone, and practitioner.

Payment Reconciliation by Clinic
Clinic payment totals by date for the selected date range. Shows cash, cheque, InsCheque, 3rd party cheque, total cheque, and totals in till; debit, visa, M/C, other, total in cards. Also lists TelePlan, total deposit, and refund NSF.

Payment Reconciliation by Practitioner
Displays practitioner totals for each month of the selected date range. Displays columns including date, cash, cheque, InsCheque, 3rd cheque, total cheque, total. Displays columns including card totals as debit, visa, m/c, other, and total. Also displays columns including TelePlan, total deposit, and refund NSF. Can be run for a single practitioner or multiple practitioners. Is used to balance the different payment methods at the end of the week or month.

Payment Reconciliation for Year End
Displays columns including date, cash, InsCheque, 3rd cheque, total cheque, total. Displays columns including debit, visa, m/c, other, total. Also displays columns for TelePlan, total deposit, and refund NSF. Payment totals by month for the selected date range. Can be run for a single practitioner or multiple practitioners.

Payment Reconciliation for Year End – Clinic
Clinic payment totals for each month of the selected date range. Displays date, till totals; Cash, cheque, InsCheque, 3rd cheque, total cheque, totals as well as cards; debit, visa, m/c, other, total.

Also displays TelePlan, total deposit, refund NSF. Displays total office days at the bottom. Is used to balance the different payment methods at the end of the year.

Practitioner Monthly Comparison
Comparison of monthly revenue for selected date range, one column per month, one page per year. Displays year, category, months, and total. Report will go back as far in time as data is available.

Practitioner Outstanding
Displays all fee items not fully paid, listed by practitioner and organized by month for the selected date range. Displays service date, description, patient, bill to fee, paid, outstanding. Double clicking on a month will bring up the totals for that month. Can be run for one practitioner or multiple practitioners.

Practitioner Production by Default Practitioner
Production report for revenue and taxes by practitioner. Subtotal is by patients default practitioner. Displays quantity, description, visits, insurance, patient, 3rd party, taxable amount, PST, GST. Can be run for any selected date range, one practitioner or multiple practitioners.

Practitioner Production by Vendor
Production report with gross profit, revenue, and taxes by vendor and practitioner. Can be run for any selected date range, for a single practitioner or multiple practitioners. Displays quantity, description, visits, insurance, patient, 3rd party, taxable amount, PST, GST, cost, gross profit, and gross profit %. Double clicking on a fee code will bring up the transactions for it.

Practitioner Production Report
Production report for revenue and taxes by practitioner. Can be run for any selected date range, a single practitioner or multiple practitioners. Shows quantity, description, visits, insurance, patient, 3rd party, taxable amount, PST and GST. Organized by category. Summarizes MSP, ICBC, WCB fees and payments. Double clicking on an item line will bring up the transactions for it.

Practitioner Production Report by Gender & Age
Production report by gender and age. Displays gender and age range, visits, insurance, patient, 3rd party, total, and %. Can be run for any selected date range, one practitioner or multiple practitioners. Double clicking an age group will bring up the patients for it.

Practitioner Production Summary
Production report for revenue and taxes by practitioner. Can be run for any selected date range, one practitioner or multiple practitioners. Lists quantity, description, visits, insurance, patient, 3rd party, taxable amount, PST, and GST. Summarizes MSP, ICBC, WCB fees and payments. Double clicking on an item line will bring up the transactions for it.

Practitioner Production with GP
Production report with gross profit, revenue and taxes by practitioner. Double clicking a fee code in the report will bring up the transactions for that code. Shows today's date, practitioner name,

quantity, description, visits, insurance, patient, 3rd party, taxable amount, PST, GST. Also shows cost, gross profit, and gross profit %. List transactions by category, with MSP/ICBC/WCB fees and payments at bottom, totalling insurance, patient, and third party. Also lists taxable amount, GST and PST.

Practitioner Refused Claims
Shows all fee items marked as refused by practitioner, by month for the selected date range. Shows service date, description, patient, bill to, explanatory, fee, paid, outstanding. Also shows total refused for the month. Can be ran date or a date range, a single practitioner or multiple practitioners.

Practitioner Sales
Displays sales report with revenue and taxes by practitioner. Shows quantity, description, visits, patient, other, taxable amount, PST, GST. Totalled by category, lists practitioner totals. Can be run for any selected date range, with one practitioner or multiple practitioners.

Practitioner Sales with GP
Sales report with gross profit, revenue and taxes, organized by practitioner. Displays quantity, description, visits, patient, other, taxable amount, PST, GST, cost, gross profit, and gross profit %. Double clicking on a fee code will bring up all the transactions for it. Grouped by every 10 categories. Can be ran for any selected date range, one practitioner or multiple practitioners. Displays clinic totals at the end.

Practitioner Schedule
Practitioner schedule of appointments by day. Shows time, patient name and phone, age, bill to, reason, and appointment notes.

Practitioner Write Offs
Displays all fee amounts with the prefix “WOFF” by practitioner, organized by month within the date range selected. Shows transaction, service, description, patient, and amount. Double clicking on the month will bring up totals for that month. Can be run for a single practitioner or multiple practitioners.

Practitioner Yearly Appointment Comparison
Displays yearly appointment comparison by practitioner, organized by month and year. Can be run for a single day or a date range. Displays month, office days, arrived & %, cancel & %, no show & %, rescheduled & %, no status & %, and total. Summarizes totals at bottom by practitioner, and displays clinic totals at end. Shows pie chart at bottom of each page with a summary at the end.

Practitioner Yearly Comparison
Shows yearly revenue, payment and visit comparison for a date range. Report dates back maximum of five years, one column for each year. Organized by month, displaying fees/payments/visits per practitioner. Can be run for a single practitioner or multiple practitioners.

Prescription Label (Dymo 1x3.5)
Prescription label for products invoiced in the billing screen. Dymo 1”x3 ½” label.

Price List
Price list shows sell, cost, unit & tax status for all fees, sorted by category. Displays item, vendor, sell, unit, taxes.

Product Label (Dymo 1x3.5)
Product Label for product invoiced in the billing screen.

Product Order List
Report to show items that are needed in order to bring stock up to maximum. Displays supplier, contact, notes, product, description, quantity in stock, full inventory, quantity to order, unit cost, extended cost.

Product Price List
Product price list shows sell, cost, unit and tax status for inventory items grouped by vendor. Displays item, vendor, description, sell, last cost, and unit.

Product Price List Description Order
Report to show items that are needed in order to bring stock up to maximum. Shows item, vendor, sell, last cost, unit.

Product Sales by Patient
Displays product sales by patient, subtotalled by practitioner. Double clicking on the item brings up the transaction.   Lists product, patient, quantity, and amount. Can be run for any selected date range, single practitioner or multiple practitioners.

Production by City Report
Lists patient visits, fees, and payments organized by date and city. Can be run for a date or date range, for a single practitioner or multiple practitioners. Double clicking on a patients name will bring up the transactions for that patient. Each practitioner will be listed on a new page.

Production by Default Practitioner with GP
Production report for revenue and taxes by practitioner. Displays quantity, description, visits, insurance, patient, 3rd party, taxable amount, PST and GST. Also displays cost, gross profit, and gross profit %. Subtotal is by patients default practitioner. Double clicking an item line will bring up the transactions for it. Can be run for any selected date range, a single practitioner or multiple practitioners.

Production by Patient Detailed
Production report by patient lists details of transactions. Displays name of patient, service date, transaction date, fee, pay, taxable and GST. Can be ran for any selected date range, one practitioner or multiple practitioners. Displays clinic totals at end.

Production by Patient Report

Production report by patient. Lists patient name, phone, visits, insurance fee/pay, patient fee/pay, 3rd party fee/pay, taxable amount, and GST. Totals with MSP, ICBC, WCB fees/payments. Also displays A/R change. Can be used for any date range, one practitioner or multiple practitioners.

Recall Statistics
Recall statistics show the number of recalls for the selected date range. Shows date range that was selected, today's date, practitioner, and the following listings under each practitioner; recalls for the period, completed, not completed, with future appointment, with future recall. Patients with recalls, completed, not completed, with future appointment, with future recall.

Referral Labels – 5160
Prints address labels for all the patients or doctors who have referred new patients within the selected date range. Specify skip # of labels if a partial sheet of labels will be used. Displays name and address.

Referring Doctors Report with Address
Report listing of doctors who have referred patients to this clinic. Subtotalled by each practitioner within the clinic. Use the date range to select the date the new patient files were created. Lists doctors, total referrals, MSP, ICBC WCB, Private, and 3rd party. Double clicking on a doctor's name will bring up the patients referred.

Request for Patient Records
Request for patient records form for the selected patient.

Request for Records form
Request for patient records form for the selected patient. Lists date, patient info, requester, office, and questionnaire. Shows patient release at bottom with place for initials and patient.

Third Party Accounts Receivable
Accounts receivable report for third party outstanding amounts, balance is as of print time. Subtotalled by practitioner with a clinic grand total. Shows patient, current, over 30, over 60, over 90, b alance. Double clicking a patient name will bring up the transactions for that patient. Can be run for a single practitioner or multiple practitioners.

Third Party Accounts Receivable Details
Third party accounts receivable details report for patient outstanding amounts for selected date range. Balance as of "To" date. Subtotalled by practitioner, with a grand total for clinic. Displays patient, current, over 30, over 60, over 90, balance. Can be run for any date range, a single practitioner or multiple practitioners.

Treatments Per Area
Displays coloured bar graph of treatment areas. Number of patients per each treatment area (ICD9 code) Only patients last seen within the date range will be selected.

Update Request Form
Patient information update form for the selected patient. Displays date, practitioner name, patient

name, last adjustment date, questions in regards to time away from clinic, and information update area.

Vendor List
Displays vendor code, name and address, contact and phone/fax/other contact info.

Visit Statement (Extended)
Visit statement showing only "visit" fees for the selected patient. Can be ran for any selected date range, one practitioner or multiple practitioners. Shows practitioner name and registration number, clinic name and address, date of printing, patient name and address, chart number, PHN. Transactions show practitioner, date, fee code, description, fee, paid.

Visits by Diagnostic Code
Displays number of visits per diagnostic code. When in preview, double clicking a line will bring up the patient names, Double clicking the patient names will bring up the dates of service.

WCB 8c- 11c Report
WCB 8c and 11c report for chiropractors.

WCB Invoice
Statement of WCB billings for the selected date range. Displays practitioner name, clinic name and address, practitioner and payee numbers, today's date, patient name and address, adjuster, PHN, claim, date, area, position, nature. Transactions include practitioner name, date, fee code, description, fee, payment, and paid. Displays total at bottom.

WCB Questionnaire
WXB Questionnaire for the selected patient. Displays patient name and address, today's date, date of injury, time, am/pm, occupation, years in present occupation, employer, address, employers phone number, and various related questions in regards to the injury.

WCB Statement
Prints a statement of WCB billing entries for the selected date range. Shows clinic name and address, today's date, patient name and address, adjusted, PHN, claim, date, area, position, nature. Transactions include practitioner, date, fee code, description, fee, payment, paid.

Weekly Schedule
Shows weekly schedule for the week, with one column for each day. Displays time by intervals. Shows practitioner name and week at top.

X-Ray Request Form
X-ray request form for the selected patient. Displays date of request, requester, office, patient name, date required, patient MRN, patient DOB, what is being requested, and release blurb at the bottom.

Year End Extended Statement
Displays extended statement for all patients who are marked as "Print Year End Receipt" in the

patient file. Displays practitioner name, clinic and address, date of printing, patient name and address, chart number, PHN, date of service, code, description, fee, payment, and paid. Summarizes at bottom the opening balance, total fees, total payments, and balance owing. All visits within the date range selected will be printed. Can be run for one practitioner or multiple practitioners.