

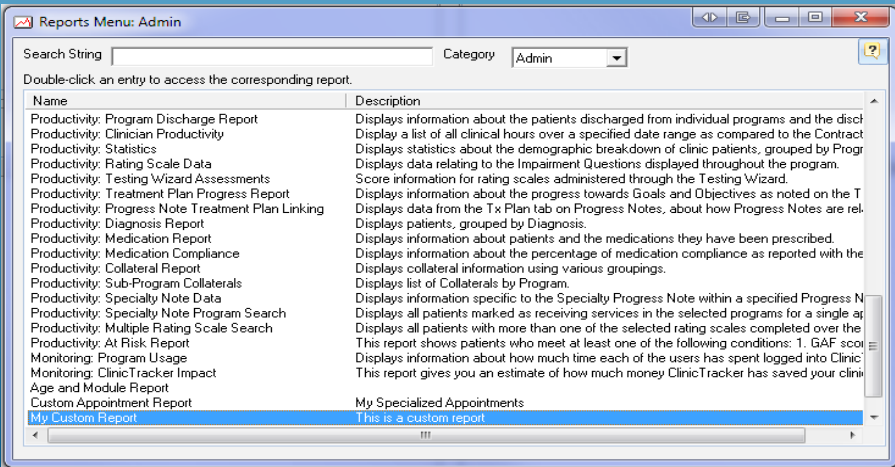


Product Brief

# Reporting and Decision Support

ClinicTracker Reporting lets you produce reports effortlessly

Need to generate a report using clinical data? Chances are ClinicTracker already has it prestored! If not, you can build it in just minutes.



## Instant access to hundreds of stock reports

Over the years we've designed a remarkable number of detailed reports for clinic directors and managers who have needed them to track operations, respond to regulatory requirements, and boost clinic efficiency. Some of them address routine questions: How many appointments did each of our programs generate over a date range? How many of our clients are prescribed a certain medication? Can I get a listing of all the caseload for each clinician? How about a report that shows the extent to which our no-show rate fluctuates by month? Or a listing of all the appointments that are missing a written Progress Note? We've also been asked to create reports that drill down to the smallest details of a program's operations.

Patient Information Date Range: (08/19/2008-01/22/2012)

All 1/23/2013

Patients	Headline #	Additional ID	Date Issued	Date	Patent/Cons	Type	Status	DOB	Age	Follow-up Clinician	Time-in-Insurance	Location-Insurance	Treatment-Insurance	Group-Insurance
Alber, Rachel			09/01/2009	09/01/2009	General	Patient	Active	08/12/1983	27					
Yarnon			09/01/2009	09/01/2009	General	Patient	Active	04/28/1914	76					
Andresen, Fletcher			09/04/2009	09/04/2009	General	Patient	Active	09/21/1978	34	Medicaid				
Andresen, Lena			09/04/2009	09/04/2009	General	Patient	Active	09/21/1993	19	Medicaid				
Arnold, Alan			09/01/2009	09/01/2009	General	Patient	Active	03/04/1932	60	Medicaid				
Bark, Anthony			09/01/2009	09/01/2009	General	Patient	Active	03/04/1932	60	Medicaid				
Bayle, Jane	2007		09/04/2009	09/04/2009	General	Patient	Active	03/04/1924	58					
Becky, Margaret			09/04/2009	09/04/2009	General	Patient	Active							
Becky, George			09/02/2009	09/02/2009	General	Patient	Active							
Bied, Marilyn			09/04/2009	09/04/2009	General	Patient	Active							
Bied, Willard			09/04/2009	09/04/2009	General	Patient	Active							
Bigs, Christine			09/04/2009	09/04/2009	General	Patient	Active							
Boh, Ann			09/01/2009	09/01/2009	General	Patient	Active							
Byrne, Lorraine	194772		09/04/2009	09/04/2009	General	Patient	Active							
Calum, Kendall			09/04/2009	09/04/2009	General	Patient	Active							
Camp, Andrew			09/01/2009	09/01/2009	General	Patient	Active							
COLL, ELIZABETH	400433		07/30/2010	07/30/2009	General	Patient	Active	10/21/1918	94					
Cook, Sue, Susan	2001		09/07/2009	09/07/2009	General	Patient	Active	05/27/1954	58					
Cooney, Dennis			09/07/2009	09/07/2009	General	Patient	Active	09/17/1933	79					
Cooper, Katei			09/02/2009	09/02/2009	General	Patient	Active	09/01/1976	38	Medicaid				
Evans, Margie			09/01/2009	09/01/2009	General	Patient	Active	08/21/1916	96	Medicaid				
FC, Tim			09/30/2010	09/30/2010	General	Patient	Active	03/30/2009	3	Asen use for EZ				
Felix, Mary			09/07/2009	09/20/2009	General	Patient	Active	10/07/1948	64	DC B3 Exclusion				
Fink, Tasha	2004		09/02/2009	09/02/2009	General	Patient	Active	11/19/1980	32					
Francis, Brent			09/07/2009	09/07/2009	General	Patient	Active	07/30/1949	63					
Garcia, Diana	221432		01/12/2010	12/31/2010	General	Patient	Active	08/01/1979	33	Asen use for EZ	DC B3 Exclusion			
Gill, Patricia			09/04/2009	09/04/2009	General	Patient	Active	04/24/1969	43					
Gravitt, Chelsea			09/02/2009	09/02/2009	General	Patient	Active	06/01/1947	65	Medicaid				
Hill, Evan	2000		09/03/2009	09/03/2009	General	Patient	Active	03/30/1940	73					
Hogg, Robert			09/01/2009	09/01/2009	General	Patient	Active	09/10/1933	79					
Hoskins, Yvonda			09/01/2009	09/01/2009	General	Patient	Active	02/19/1919	93	Medicaid				
Ingram, Phyllis			09/04/2009	09/04/2009	General	Patient	Active	04/28/1939	73	Medicaid				
Johann, Alan			09/03/2009	09/03/2009	General	Patient	Active	04/18/1920	92					

The end result is that we have built hundreds of valuable reports into ClinicTracker using Crystal Reports, an industry standard reporting tool. All of these reports are at your disposal with the click of a button.

There are various ways to export a report once it is created. These options include, PDF, CSV, RTF, and more.



Can't find the exact report you need? No problem.

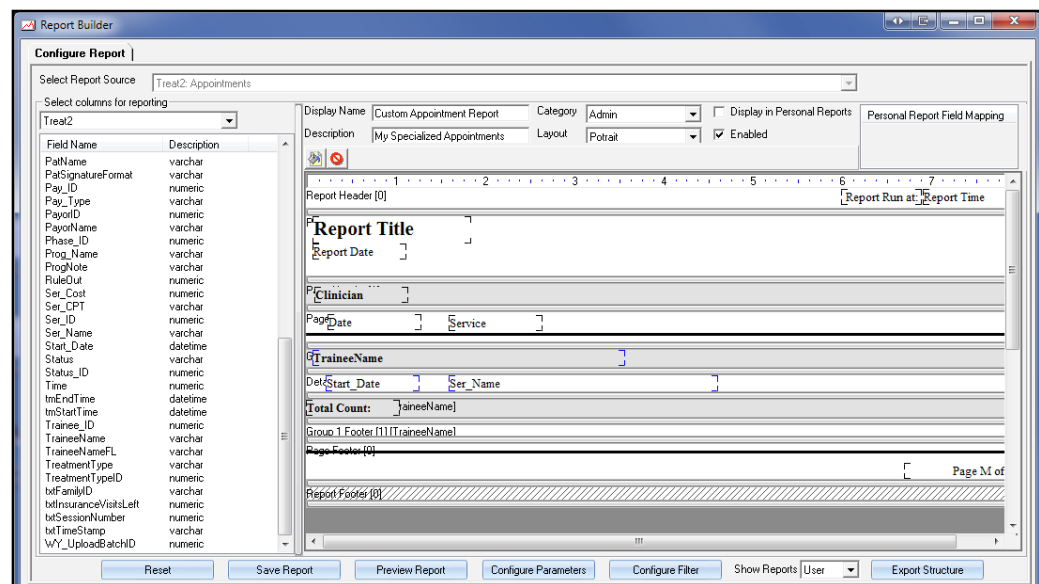
You have two options:

**Option #1:**

Ask us! If you can identify an existing report that provides nearly all the information you need, but perhaps needs a minor modification, our customer support agents may be able to adjust the report to meet your needs.

**Option #2:**

Create your own reports using the ClinicTracker Report Builder. We designed it to give you complete control over the content and design of a report without having to rely on a programmer (or know anything about programming). Anyone can create and customize a report in minutes. Build reports based on current templates that come with ClinicTracker or forms you might create with our Custom Form Builder utility.



**A wide spectrum of useful reports**

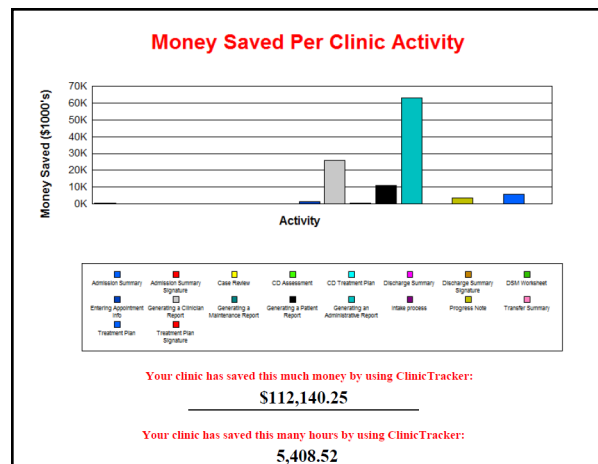
Reporting categories include:

- Patient Populations
- Staff Productivity
- Intake Process
- Financials
- Aging
- Clinic Productivity
- Clinic Statistics
- Compliance Information
- Appointment History
- And many more



### Instant benefits:

- Over 200 built-in reports allow you to institute a high level of accountability across the breadth of your clinical operation
- Monitor compliance status in real time
- Improve operational efficiency by close tracking of key metrics
- Boost your profitability with accurate information
- Enhance decision making with easy access to the data you need
- Increase staff productivity by monitoring caseloads
- Eliminate the hassle and cost associated with printing and storing paper reports



### Small sample of reports already built into ClinicTracker:

#### PATIENT REPORTS

- Patient Listing
- Patient Groups & Sub Groups
- Follow-Up Clinician Listing
- Patients by Insurer
- Encounters by Service
- Historical Caseload

#### STAFF REPORTS

- General Staff Information
- Clinician Caseload by Supervisor
- Clinician Reports
- Supervisors and Clinicians
- Insurers by Clinician
- Supervisor Reports

#### ADMINISTRATIVE REPORTS

- Compliance Report
- Missing/Unsigned Progress Notes
- Completed Paperwork
- Late Compliance Materials
- Unsigned Paperwork
- Recent Discharge Summaries



## INTAKE INFORMATION

- Intake Reports by Date Entered
- Intake Risk Screening
- Intakes by Referral Source

- Intake Reports by Admission Date
- Intakes by Clinician
- Waiting List Report

## CLINIC PRODUCTIVITY

- Missed Appointments
- Discharge Report
- Medication Compliance

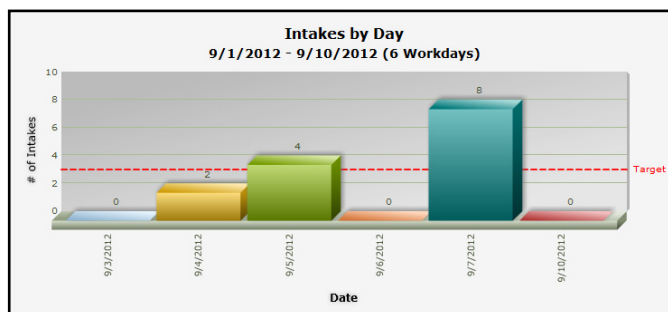
- Appointments by Location
- Rating Scale Data
- Patients Not Recently Seen

Billable Hours Report by Staff Summary		Date Range: 01/19/2008-05/23/2011
5/26/2011		
This is a listing of all appointments that were kept combined with collateral activities and staff-based activities over a given date range. The summary statistics are subdivided by type of occurrence on the list page.		
Staff	Time (Minutes)	
Allen, Tania	49 Hours, 28 Minutes	
Alvares, Aileen	2 Hours, 30 Minutes	
Anderson, Barbara	4 Hours, 0 Minutes	
Arquandine, Julie	103 Hours, 0 Minutes	
Bales, Adrienne	51 Hours, 0 Minutes	
Palenberg, Stephanie	2 Hours, 0 Minutes	
Dunneer, Wendy	2 Hours, 0 Minutes	
Olson-Morgan, Kathleen	3 Hours, 0 Minutes	
Hogrove, Terry	30 Hours, 0 Minutes	
Hopkins, Geoffrey	0 Hours, 24 Minutes	
Keith, David	10 Hours, 0 Minutes	
Lane, Loren	3 Hours, 0 Minutes	
Lewis, Lucy	8 Hours, 0 Minutes	
Milburn, Suzanne	2 Hours, 0 Minutes	
Murray-Spanik, Nichole	2 Hours, 30 Minutes	
Poole, Katie	20 Hours, 10 Minutes	
Pine, Marianne	20 Hours, 0 Minutes	
Schiller, Susi	22 Hours, 24 Minutes	
Shaw, Mack	402 Hours, 41 Minutes	
Simsoneaux, Mikal	1 Hour, 0 Minutes	
Smith, Jane	27 Hours, 15 Minutes	
Smith, Francis	1 Hour, 0 Minutes	
Stadler, Joel	2 Hours, 0 Minutes	
Stoneman, Amy	14 Hours, 0 Minutes	
Talbot, Mohammad	6 Hours, 30 Minutes	
Yu, Haig	2 Hours, 45 Minutes	
Zinna, Khalida	4 Hours, 0 Minutes	
<b>Grand Total</b>	<b>Length</b> 613 Hours, 41 Minutes	
<b>Insurance Provider Type Breakdown</b>		
	<b>Length</b>	<b>Percentage</b>
Public Total	456 Hours, 71 Minutes	55.71%
Private Total	140 Hours, 43 Minutes	18.8%
Self Total	310 Hours, 14 Minutes	37.89%

Payments by Date, Payor						Report Date: 8/15/2011
For payments in the period: 01/01/2011 - 08/15/2011						Page: 1
<b>Payment Date: 01/26/2011</b>						<b>Date Total: \$600.00</b>
Payor:	Medicaid					Payor Total: \$600.00
Pay ID	Payment Date	Reference #	Payment Type	Payment Method	Amount	
304	01/26/2011	5745624	Insurer - Payment	Check	\$500.00	
306	01/26/2011	5745625	Insurer - Payment	Check	\$100.00	
<b>Payment Date: 01/27/2011</b>						<b>Date Total: \$100.00</b>
Payor:	Medicaid					Payor Total: \$100.00
Pay ID	Payment Date	Reference #	Payment Type	Payment Method	Amount	
309	01/27/2011	5745626	Insurer - Payment	Check	\$100.00	
<b>Payment Date: 03/28/2011</b>						<b>Date Total: \$100.00</b>
Payor:	Medicaid					Payor Total: \$100.00
Pay ID	Payment Date	Reference #	Payment Type	Payment Method	Amount	
329	03/31/2011	5745627	Insurer - Payment	Check	\$100.00	
<b>Payment Date: 04/07/2011</b>						<b>Date Total: \$100.00</b>
Payor:	Medicaid					Payor Total: \$100.00
Pay ID	Payment Date	Reference #	Payment Type	Payment Method	Amount	
337	04/07/2011	5745628	Insurer - Payment	Check	\$100.00	
<b>Payment Date: 04/18/2011</b>						<b>Date Total: \$100.00</b>
Payor:	Medicaid					Payor Total: \$100.00
Pay ID	Payment Date	Reference #	Payment Type	Payment Method	Amount	
340	04/18/2011	5745629	Insurer - Payment	Check	\$100.00	
<b>Payment Date: 06/08/2011</b>						<b>Date Total: \$100.00</b>
Payor:	Medicaid					Payor Total: \$100.00
Pay ID	Payment Date	Reference #	Payment Type	Payment Method	Amount	
354	06/08/2011	5745630	Insurer - Payment	Check	\$100.00	
<b>Grand Totals:</b>						<b>Total Transactions: 7</b>
						<b>Total Amount: \$1,100.00</b>

## Executive Dashboard

Combine the standard ClinicTracker reporting capabilities with our new Executive Dashboard tool for tracking key clinic metrics in real time. Set goals, view progress, and create presentations for board meetings. Use our built-in metrics or track clinical information of your choice!



Improve productivity and support your business intelligence needs with this powerful system.

For more information about how this flexible utility can benefit your practice, contact us at 315.633.4240 or [ClinicTracker@JAGProducts.com](mailto:ClinicTracker@JAGProducts.com)