



Topic	Alternate Provider Activity Report – Rendering Provider
Document #	991
Product	OM
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Some SOS customers have found that the Provider Activity Report by Rendering Provider seems to run much slower in the SOS 2010 Release. After some investigation we have determined that either the new Crystal Reports components, or (much less likely) the database engine are handling the embedded summary sub-reports much slower.

One approach to dealing with this problem is simply to do a version of the report that is formatted in such a way that the subreports are no longer needed. Testing of this alternate format shows that it runs much, much faster. One test produced a 750 page report in six minutes. The same selection options using the original report takes several hours to complete.

Although this new alternate format contains all the same information as the original report, there are several differences in the presentation that may or may not work for you:

1. Charge and credit (adjustments and payments) details are presented in separate sections instead of mixed together.
2. Charge details are grouped by service code, with the subtotals for each service code at the end of its group. Likewise, credit entries are grouped by type (adjustment code, check, cash, credit card, other) with subtotals at the end of each type group. The original report format presents all the subtotals after printing all the details for the provider. This difference is only present in the detailed report; the summary version of the report is very similar to the standard version.
3. To print a Practice Grand Totals breakdown of charge and credit subtotals, you must use a separate report. Checking that option in the report setup has no effect on the output.

See samples on the next two pages.

Here is a sample of the detailed Services section for a provider. Note that all names in these samples are randomly generated):

**Account Activity Grouped by Rendering Provider**

01/16/11 05:36PM

Includes services dated, and credits applied, between 01/01/02 and 01/07/02; ALL provider categories; ALL provider types; ALL provider codes; ALL sort codes

**PETERSON, Pete (3)**

**SERVICES RENDERED**

Srv Date	Account Name / ID	Srv Code	Fee	Comment
<b>/COLL.FEE : COLLECTION FEE</b>				
01/03/02	MCCOY Samatha / SAMMCC00001887	/COLL.FEE	8.00	
01/03/02	DASCENZO Gordon / GORDA00002330	/COLL.FEE	12.00	
<b>/COLL.FEE : COLLECTION FEE</b>			<b>20.00</b>	<b>Count = 2 Units = 2.00 Cost = 0.00</b>
<b>/FKA : FAILED TO KEEP APPOINTMENT</b>				
01/03/02	ROSEN Ken / KENROS00001816	/FKA		
<b>/FKA : FAILED TO KEEP APPOINTMENT</b>			<b>0.00</b>	<b>Count = 1 Units = 1.00 Cost = 0.00</b>
<b>INITIAL : INITIAL/EVALUATION</b>				
01/07/02	BUHLER Janice / JANBUH00002423	INITIAL	40.00	
01/07/02	CHEN Emely / EMECHE00002424	INITIAL	100.00	
<b>INITIAL : INITIAL/EVALUATION</b>			<b>140.00</b>	<b>Count = 2 Units = 2.00 Cost = 0.00</b>
<b>OV90806 : INDIVIDUAL PSYCHOTHEA</b>				
01/02/02	PERCER Verda / VERPER00002359	OV90806	100.00	
01/02/02	AKERS Adam / AKERS1	OV90806	100.00	
01/02/02	PHILLIPS Melisa / MELPHI00002340	OV90806	100.00	
01/02/02	MCGHEE Elissa / ELIMCG00000254	OV90806	100.00	
01/02/02	MCAFEE Adrian / ADMCA00001919	OV90806	100.00	
01/03/02	BANKS Marcia / MARBAN00002396	OV90806	100.00	
01/03/02	CLASEN Allison / ALLCLA00002207	OV90806	100.00	
01/03/02	ROY Aubrey / AUBROY00002240	OV90806	100.00	
01/03/02	DUNGAN Julio / JULDUN00002267	OV90806	100.00	
01/04/02	BALLEW Karrie / KARBAL00002422	OV90806	100.00	
01/04/02	JUMPER Dana / DANJUM00002418	OV90806	100.00	
01/04/02	WEIRICH Alejandro / ALEWEI00002218	OV90806	50.00	
01/04/02	SHILLINGSBURG Lucilla / LUCSHI00002331	OV90806	100.00	
01/04/02	MILSTEAD Roy / ROYMIL00002410	OV90806	100.00	
01/07/02	FARHAT Beverley / BEVFAR00002399	OV90806	100.00	
01/07/02	GREER Dean / DEAGRE00002332	OV90806	40.00	
01/07/02	HEATH Aimee / AIMHEA00002381	OV90806	100.00	
01/07/02	GERBODE Sylvia / SYLGER00001790	OV90806	50.00	
<b>OV90806 : INDIVIDUAL PSYCHOTHERAPY</b>			<b>1,640.00</b>	<b>Count = 18 Units = 18.00 Cost = 540.00</b>
<b>ALL SERVICE CODES FOR PROVIDER</b>			<b>1,800.00</b>	<b>Count = 23 Units = 23.00 Cost = 540.00</b>

Below is a sample of a Payments and Adjustments printout. There will be a section for each relevant adjustment code, and a section for each type of payment received:

**Account Activity Grouped by Rendering Provider**

01/16/11 05:36PM

Includes services dated, and credits applied, between 01/01/02 and 01/07/02; ALL provider categories; ALL provider types; ALL provider codes; ALL sort codes

**PETERSON, Pete (3)**

**PAYMENTS AND ADJUSTMENTS**

Cred Date	Account Name / ID		Payment	Adj'ment	Comment
01/04/02	COOPER Sierra / SIECOO00002260	01/04/02		0.75	22: Cooper (SYSFC 08/31/01)
01/04/02	COOPER Sierra / SIECOO00002260	01/04/02		0.83	22: Cooper (SYSFC 11/30/01)
01/04/02	COOPER Sierra / SIECOO00002260	01/04/02		12.00	22: Cooper (/COLL.FEE 12/03/01)
01/07/02	GREER Dean / DEAGRE00002332	01/07/02		3.60	22: Greer (SYSFC 11/30/01)
01/07/02	GREER Dean / DEAGRE00002332	01/07/02		4.80	22: Greer (SYSFC 12/31/01)
<b>Adjustment (22)</b>				<b>134.84</b>	<b>Count = 13</b>
<b>Adjustment (T1)</b>					
01/03/02	PERCER Verda / VERPER00002359	01/03/02		1.27	T1: BLUE CROSS OF CALIFORNIA (OV 90806 12/19/01)
01/04/02	COOPER Sierra / SIECOO00002260	01/04/02		0.83	T1: Cooper (SYSFC 12/31/01)
01/07/02	MCAFEE Adrian / ADRMCA00001919	01/07/02		40.00	T1: USBHPC (OV90806 12/12/01)
<b>Adjustment (T1)</b>				<b>42.10</b>	<b>Count = 3</b>
<b>Cash</b>					
01/03/02	JUMPER Dana / DANJUM00002418	01/03/02	10.00		Cash: Jumper (OV90806 12/21/01)
01/03/02	JUMPER Dana / DANJUM00002418	01/04/02	10.00		Cash: Jumper (OV90806 01/04/02)
01/09/02	AKERS Adam / AKERS1	01/07/02	10.00		Cash: Akers (OV90806 12/20/01)
01/09/02	AKERS Adam / AKERS1	01/07/02	10.00		Cash: Akers (OV90806 01/02/02)
<b>Cash</b>			<b>40.00</b>		<b>Count = 4</b>
<b>Credit Card</b>					
01/04/02	DUNGAN Julio / JULDUN00002267	01/03/02	15.00		Cred Crd: Dungan (OV90806 01/03/02)
<b>Credit Card</b>			<b>15.00</b>		<b>Count = 1</b>
<b>Check</b>					
01/03/02	BANKS Marcia / MARBAN00002396	01/03/02	5.00		Chk# 1384: Banks (OV90806 01/03/02)
01/07/02	HEATH Aimee / AIMHEA00002381	01/07/02	15.00		Chk# 6867: Heath (OV90806 12/17/01)
01/07/02	MCCARTHY Tracy / TRAMCC00002349	01/07/02	75.00		Chk# 82179008: AETNA US HEALTHCARE PP (OV 90806 12/10/01)
01/07/02	MCAFEE Adrian / ADRMCA00001919	01/07/02	15.00		Chk# 10083590: USBHPC (OV90806 12/12/01)
01/07/02	MCAFEE Adrian / ADRMCA00001919	01/07/02	35.00		Chk# 10083590: USBHPC (OV90806 12/12/01)
<b>Check</b>			<b>145.00</b>		<b>Count = 5</b>
<b>ALL ADJUSTMENTS FOR PROVIDER</b>				<b>176.94</b>	
<b>ALL PAYMENTS FOR PROVIDER</b>				<b>200.00</b>	

To add these reports to your system, follow these steps:

Download the two new report files and place them in your SOS program folder, usually C:\SOS. Here are the links for the two files:

<http://www.sosoft.com/files/downloads/sos201001/provactrb.rpt>

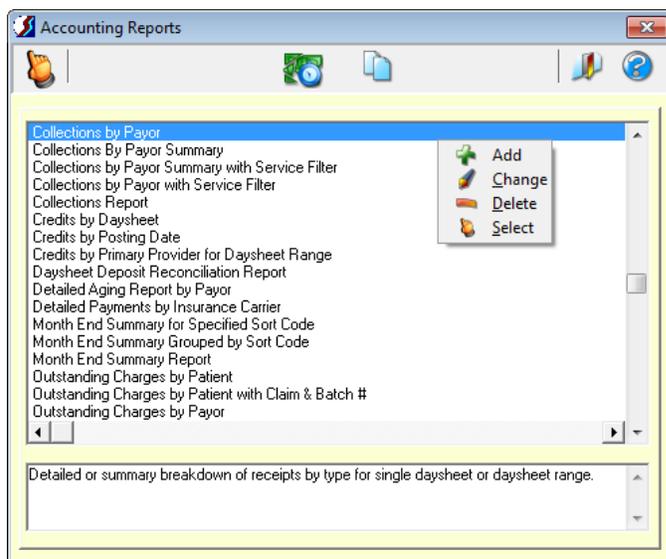
and

<http://www.sosoft.com/files/downloads/sos201001/provactrc.rpt>

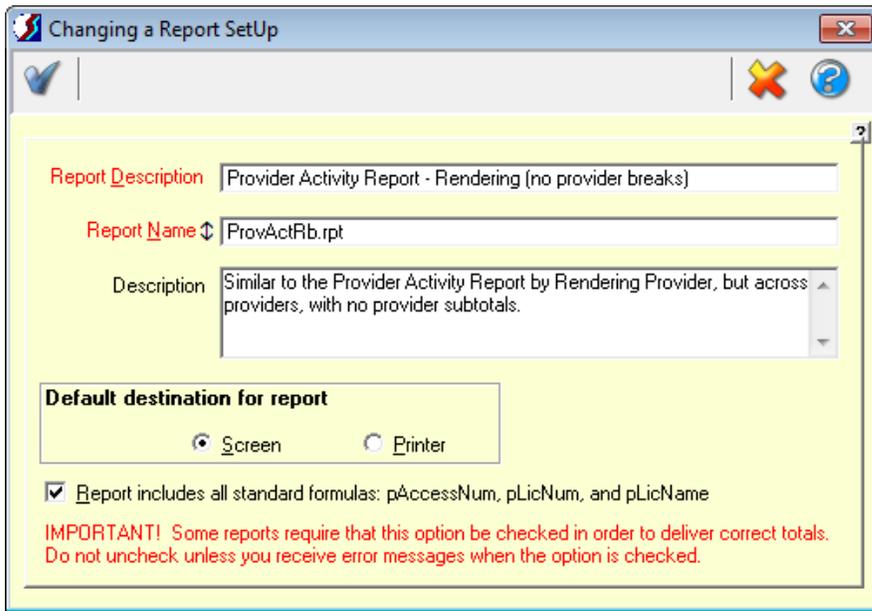
After testing, if you like and want to use these reports, then make sure you copy the two files to any other workstations that are used to run them.

Next, add an entry for each report to your Reports menu. Although you can put them into any of the report submenus, it would make sense to add them to the **Reports > Accounting Reports** list. You can then use the icon in the toolbar at the top of that report menu to copy them to your **Reports > Favorites** menu as well.

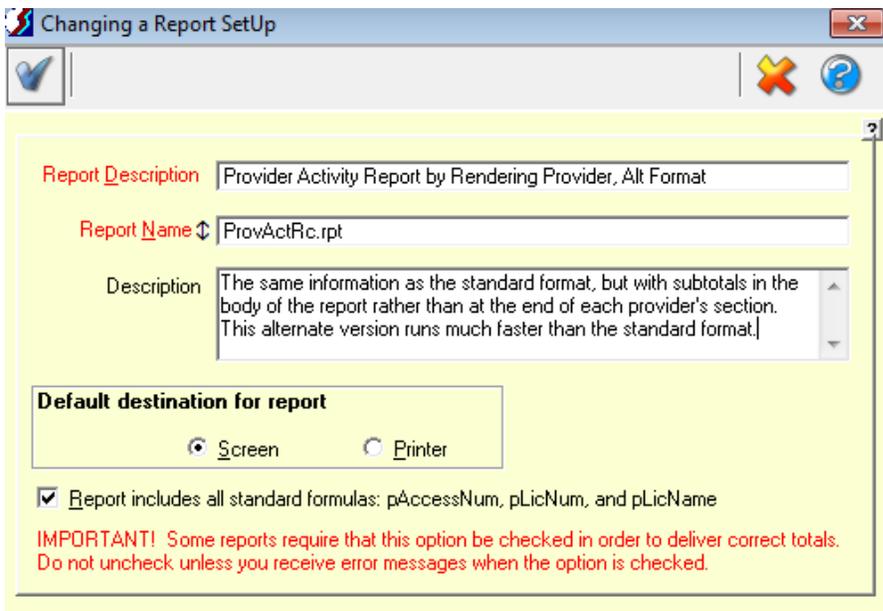
1. Make sure that you have logged in OM with a supervisor-level ID. Non-supervisor users cannot make changes to menus.
2. Open the desired report menu, such as **Reports > Accounting Reports**.
3. Right-click in the white area of the list to open the context menu:



4. Left-click **Add**.
5. Complete the form as shown below. The “Report Name” field must be entered exactly, but the two description fields can be changed to anything that makes sense to you. This one is the grand totals report, PROVACTRB.RPT.



6. Save, then repeat the process for the other report, PROVACTRC.RPT:



7. Save.

You should now be able to run your new reports. We would appreciate your feedback so that we can make any needed adjustments before these go out in the next update.