

## Sample Healthcare Practice

## Custom Report

## Sample Custom Report

8/7/2007

PATNO	PATIENT	DATE	PATNOTE
10010	Kimberly, Amendolatt	1/27/2000	Patient sent Welcome postcard this date.
10010	Kimberly, Amendolatt	3/3/2000	Patient was informed of our "no show" policy.
10010	Kimberly, Amendolatt	7/14/2000	Patient sent "Thank you for referral" postcard this date.
10010	Kimberly, Amendolatt	11/27/2000	{Patient Statement printed}
10010	Kimberly, Amendolatt	3/18/2002	{Patient Statement printed}
10010	Kimberly, Amendolatt	11/20/2002	{Patient Statement printed}
10010	Kimberly, Amendolatt	12/1/2003	{Patient Statement printed}
10010	Kimberly, Amendolatt	12/1/2003	{Patient Statement printed}
10010	Kimberly, Amendolatt	12/1/2003	{Patient Statement printed}
10010	Kimberly, Amendolatt	12/1/2003	{Patient Statement printed}
10010	Kimberly, Amendolatt	12/1/2003	{Patient Statement printed}
10010	Kimberly, Amendolatt	12/1/2003	{Patient Statement printed}
10010	Kimberly, Amendolatt	12/1/2003	{Patient Statement printed}
10010	Kimberly, Amendolatt	12/1/2003	{Patient Statement printed}
10010	Kimberly, Amendolatt	12/1/2003	{Patient Statement printed}
10010	Kimberly, Amendolatt	12/1/2003	{Patient Statement printed}
10010	Kimberly, Amendolatt	12/1/2003	{Patient Statement printed}
10010	Kimberly, Amendolatt	12/1/2003	{Patient Statement printed}
10010	Kimberly, Amendolatt	12/1/2003	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10010	Kimberly, Amendolatt	8/31/2004	{Patient Statement printed}
10020	Laura, Brummel	6/23/1998	Patients needs to bring account up to balance before next visit.
10020	Laura, Brummel	10/23/2003	{Patient Statement printed}
10020	Laura, Brummel	12/1/2003	{Patient Statement printed}
10020	Laura, Brummel	12/1/2003	{Patient Statement printed}
10020	Laura, Brummel	12/1/2003	{Patient Statement printed}
10020	Laura, Brummel	12/1/2003	{Patient Statement printed}
10020	Laura, Brummel	12/1/2003	{Patient Statement printed}
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10020	Laura, Brummel	12/1/2003	{Patient Statement printed}
10020	Laura, Brummel	12/1/2003	{Patient Statement printed}
10020	Laura, Brummel	12/1/2003	{Patient Statement printed}
10020	Laura, Brummel	12/1/2003	{Patient Statement printed}
10020	Laura, Brummel	12/1/2003	{Patient Statement printed}
10020	Laura, Brummel	12/1/2003	{Patient Statement printed}
10020	Laura, Brummel	12/1/2003	{Patient Statement printed}
10020	Laura, Brummel	12/1/2003	{Patient Statement printed}
10020	Laura, Brummel	12/1/2003	{Patient Statement printed}
10030	Gary, Bainbride	6/23/1998	Patients is having financial difficulty, speak to doctor about making arrangement.
10040	Donald, Frank	6/23/1998	Patients made payment arrangement with doctor
10050	Betty, Frank	6/23/1998	Patients account is over due, must have some payment before next visit.
10060	Gayle, Frank	6/23/1998	Patient needs to speak to insurance company about their co-payments
10070	Phil, Brummel	6/23/1998	Patients husband is no longer employed, need to pay cash from now on
10080	James, Silver	6/24/1998	Patient recieved our post cards and would like to have some blanks to pass out to friends and family members.
10090	Lisa, Markson	6/24/1998	P
10090	Lisa, Markson	6/24/1998	Patient called to say how pleased she was with the doctor
10100	Barbara, Irving	6/24/1998	Patient was informed that without payment this account will be referred to our collection office.
10100	Barbara, Irving	7/15/1998	Payment has not been made to satisfaction
10100	Barbara, Irving	7/25/1998	ACCOUNT HAS BEEN REFERRED TO COLLECTIONS.
10110	Susan, Grimes	6/24/1998	Patients account is past due
10120	Fred, Paterdon	6/24/1998	Patients account has been referred to collection
10130	Eileen, Fargo	6/23/1998	Spoke to Patient, needs to bring in workers compensation papers.
10140	Luke, Green	12/9/1997	Patient needs to bring in another medicare form.
10140	Luke, Green	3/18/2002	{Patient Statement printed}
10140	Luke, Green	11/20/2002	{Patient Statement printed}
10140	Luke, Green	12/1/2003	{Patient Statement printed}
10140	Luke, Green	12/1/2003	{Patient Statement printed}
10140	Luke, Green	12/1/2003	{Patient Statement printed}

## File notes for specific patients in date range

PATNO	PATIENT	DATE	PATNOTE
10140	Luke, Green	12/1/2003	{Patient Statement printed}
10140	Luke, Green	12/1/2003	{Patient Statement printed}
10140	Luke, Green	12/1/2003	{Patient Statement printed}
10140	Luke, Green	12/1/2003	{Patient Statement printed}
10140	Luke, Green	12/1/2003	{Patient Statement printed}
10140	Luke, Green	12/1/2003	{Patient Statement printed}
10140	Luke, Green	12/1/2003	{Patient Statement printed}
10150	Harley, Valenti	6/23/1998	Doctor would like payment before treatment begins.
10150	Harley, Valenti	3/18/2002	{Patient Statement printed}
10150	Harley, Valenti	11/20/2002	{Patient Statement printed}
10150	Harley, Valenti	12/1/2003	{Patient Statement printed}
10150	Harley, Valenti	12/1/2003	{Patient Statement printed}
10150	Harley, Valenti	12/1/2003	{Patient Statement printed}
10150	Harley, Valenti	12/1/2003	{Patient Statement printed}
10150	Harley, Valenti	12/1/2003	{Patient Statement printed}
10150	Harley, Valenti	12/1/2003	{Patient Statement printed}
10150	Harley, Valenti	12/1/2003	{Patient Statement printed}
10150	Harley, Valenti	12/1/2003	{Patient Statement printed}
10150	Harley, Valenti	12/1/2003	{Patient Statement printed}
10150	Harley, Valenti	12/1/2003	{Patient Statement printed}
10150	Harley, Valenti	12/1/2003	{Patient Statement printed}
10150	Harley, Valenti	12/1/2003	{Patient Statement printed}
10150	Harley, Valenti	12/1/2003	{Patient Statement printed}
10150	Harley, Valenti	12/1/2003	{Patient Statement printed}
10150	Harley, Valenti	12/1/2003	{Patient Statement printed}
10160	Ben, Perez	6/23/1998	Patients insurance company is no longer going to cover his disability.
10160	Ben, Perez	3/18/2002	{Patient Statement printed}
10160	Ben, Perez	11/20/2002	{Patient Statement printed}
10160	Ben, Perez	12/1/2003	{Patient Statement printed}
10160	Ben, Perez	12/1/2003	{Patient Statement printed}
10160	Ben, Perez	12/1/2003	{Patient Statement printed}
10160	Ben, Perez	12/1/2003	{Patient Statement printed}
10160	Ben, Perez	12/1/2003	{Patient Statement printed}
10160	Ben, Perez	12/1/2003	{Patient Statement printed}
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10160	Ben, Perez	12/1/2003	{Patient Statement printed}
10160	Ben, Perez	12/1/2003	{Patient Statement printed}
10160	Ben, Perez	12/1/2003	{Patient Statement printed}
10160	Ben, Perez	12/1/2003	{Patient Statement printed}
10160	Ben, Perez	12/1/2003	{Patient Statement printed}
10170	Carmen, Harquail	6/23/1998	Patients needs to get new cards from insurance company.
10180	Linda, Markson	6/23/1998	Patient needs to make payment
10190	Craig, Edwards	6/24/1998	Doctor recommends a second opion.
10200	Juan, Berns	6/24/1998	Patient has recieved our mailers and would like to make and appointment.
10220	Margaret, Harris	6/24/1998	Patient came in on this date to use their free visit coupo
10221	Margie, Connolly	6/24/1998	Patient needs copies of all records.
10230	Robert, White	6/24/1998	Patient is going to be paying fpr services weekly instead of monthly payment plan.
10240	Susan, Bennett	6/24/1998	Patient called and told receptioist how pleased they were with ther doctor and his staff.
10250	Robert, Blair	6/24/1998	Patient came in today for their free consultation.
10250	Robert, Blair	7/15/1998	Patient came in today and decided to continue seeing the doctor on a regular basis.
10260	Samuel, Flynn	6/24/1998	Patient hasn't met their deductible . Remaining balance is currently \$175.00.
10270	Cathy, Day	6/24/1998	Patient would like a statement of account.
10280	Catherine, Garcia	6/24/1998	Patients wife is now in need of doctors care Isn't covered on the plan . Office will try and make some sort of payment arrangem
10290	Carl, Lambert	6/24/1998	Patients husband is swiotching companies and will need to show proof of new insurance.
10300	Karen, Lambert	6/24/1998	Patient recieved our newsletter
10300	Karen, Lambert	7/14/1998	Freinds and family of this patient have been coming for regular check-ups
10300	Karen, Lambert	7/21/1998	Patient recieved discount in return for al their referrals.
10310	Nancy, Kirby	6/24/1998	Patient will not be coming back due to finacial reasons
10310	Nancy, Kirby	7/15/1998	Sebt balnce to home address.
10320	Robert, Robinson	6/24/1998	Patient needs to update insurance cards
10330	Suzanne, Robinson	6/24/1998	Patient needs to speak to doctor about arrange home visits.
10340	Arlene, Ryan	6/24/1998	Patient ahs over due balance.
10350	Tonya, Ryan	6/24/1998	Patient had conference with doctor about seeking additional help.
10360	Melissa, Ryan	6/24/1998	Patients recieved our news letter and called to discuss up and coming new treatments.
10370	David, Taylor	6/24/1998	Patients account needs to be updated for new insurance reasons
10370	David, Taylor	7/15/1998	Patients husband has been lay-off. Need to make

## File notes for specific patients in date range

PATNO	PATIENT	DATE	PATNOTE
			payments before next visit
10380	Meredith, Kirk	6/24/1998	Patient is very pleased with the office staff.
10390	Ralph, Silverberg	6/24/1998	Patient has very large overdue balance
10390	Ralph, Silverberg	7/15/1998	Patient called about balance, will make some sort of arrangemnt with this pfice asap.
10400	Charlotte, Silverberg	6/24/1998	Patient called, recieved post card mailers.
10400	Charlotte, Silverberg	7/15/1998	Patient called to schedule appointment.
10410	Richard, Vale	6/24/1998	Patients attorney is disputed this csae finanicaly.
10420	Myrl, Chan	6/24/1998	Copies of this patients files have been forward to the attorney.
10430	Teresa, Paul	6/24/1998	Completed his visits.
10440	Katrina, Paul	6/24/1998	Doctor is uncomfortable with this patients physical condition.
10450	Josi, Paul	6/24/1998	Patient feels taht they are being over-charged.
10460	Candace, Underwood	6/24/1998	All personal information on this file is to be kept confidenta, between patient and doctor ONLY!!!!
10470	Jody, Liam	6/24/1998	Patient has finicial difficulty
10480	Connie, Booker	6/24/1998	Insurance company has denied all payments
10490	Gary, Booker	6/24/1998	Insurance company has denied all payments to this office. Patient needs to make some sort of payment arrangement.
10500	Windell, Hebert	6/24/1998	Recived post card mailers, would like to seet up free consultation with the doctor asap.
10510	Kathleen, Delaqua	6/24/1998	Family has now started to visit the office basis.
10510	Kathleen, Delaqua	6/24/1998	Patient seems to be satisfied with the doctor
10520	Susan, Falbo	6/24/1998	Received the news letter.
10520	Susan, Falbo	7/15/1998	Called to set up appointment.
10530	Elizabeth, Iorio	6/24/1998	Patient has not been keeping appointmets
10530	Elizabeth, Iorio	7/15/1998	Has called the patients home many times and no response.
10540	Catherine, Hubber	6/24/1998	No status on this account.
10550	Tiffany, Gregsen	6/24/1998	Account is on hold.
10560	Steven, Thomas	6/24/1998	Account has been put on hold till insurance claims area settled.
10570	Terry, Velez	6/24/1998	Patient like the newsletter and feels more should be distributed within other doctors office.
10580	Joy, Rodriquez	6/24/1998	Account has been terminnate due to non-payment.
10590	Stacy, Rodriquez	6/24/1998	Patient came in for free consultation.
10590	Stacy, Rodriquez	7/15/1998	Patient would like to continue seeing the doctor on a regular basis
10600	Bradley, Rojas	6/24/1998	Patient doesn't like to waite when being visited.
10610	Edmund, Rojas	6/24/1998	Patient doesn't want to pay full amount until insurance is confirmed.
10620	Eugenia, Gojas	6/24/1998	Patienthas been very good with payments and would like to ask the doctor for a free consultation for a family member.
10630	Todd, Rojas	6/24/1998	Received post card mailers.
10640	Dolores, Dodge	6/24/1998	All personal information on this account has been changed, please refer to patient file for new information.
10650	Anna, James	6/24/1998	All records have been transfered to the hospital office for further review.
10660	Debra, James	6/24/1998	Patient needs to pay the balance as soon possible.
10670	Lacey, James	6/24/1998	Patients is very pleased with the doctors recommendations.
10680	Beverly, James	6/24/1998	All records are neede tp be sent to the hospital foer review
10690	Natalie, Franklin	6/24/1998	The attorney has requested al bills and payments on this account so he can speak to workers comp.
10700	Bonnie, Hershfeld	6/24/1998	Received news letter.
10700	Bonnie, Hershfeld	7/15/1998	Made appointment
10700	Bonnie, Hershfeld	7/26/1998	Decided to see the doctor on a regular basi
10710	Lucille, Williams	6/24/1998	Received post card mailers and feels mor should be distributed in other doctors offices by word of mouth
10720	Mary Ann, Keebler	6/24/1998	Patient has been made aware of being late will delay visit by AT LEAST 1/2 Hour or more.
10730	Beth, Keebler	6/24/1998	Very happy with the staff
10740	Courtney, Keebler	6/24/1998	Office has informed patient that co-pays must be given at time of visit
10750	Paul, Kirkland	6/24/1998	Patient has been made aware of the possible waiting time even with appointment.
10760	Ernestine, Kirkland	6/24/1998	Patient hs been made awae of our no show policy.
10770	Alyson, Kern	6/24/1998	Patient can no longer have a walk in appt.
10780	Lucas, Kern	6/24/1998	Patient is longer able to ust walk in
10790	Lauren, Kern	6/24/1998	Patient has been made aware of the no show policy

## File notes for specific patients in date range

PATNO	PATIENT	DATE	PATNOTE
10800	Kendal, Krenshaw	6/24/1998	Patient ahs been madfe aware of the payment expected at visit policy
10810	Beverly, Krenshaw	6/24/1998	Patient can not just walk in
10820	Kristopher, Krenshaw	6/24/1998	Don't give any appointments to this patient without speaking to the doctor
10830	Michele, Krenshaw	6/24/1998	Patient has been made aware of the fact that he can not be seen without payment
10840	Kevin, Krenshaw	6/24/1998	Patient is no longer coming to visit the doctor.
10850	Stephanie, Krenshaw	6/24/1998	Patient has been made awrae of bad check policy
10860	Gary, Ericson	6/24/1998	Patient has been not paying properly
10870	Gloria, Ericson	6/24/1998	Patient can't be seen without payment
10880	Mary, Simpson	6/24/1998	Speak to doctor before schedulibg this patient
10890	Jeffery, Koziak	6/24/1998	Doctor will not see this patient. speak to the attorney.
10900	Diane, Koziak	6/24/1998	Patient has been rejected by insurance company.
10910	Andrew, Koziak	6/24/1998	Doctor needs to speak to Patient before making appointment
10920	Raymond, Koziak	6/24/1998	Doctor needs to speak to the attorney before seeng this patient
10930	Theresa, Shane	6/24/1998	Patient needs to sign new claims
10940	Yvonne, Kervan	6/24/1998	Patient has been made aware of our no show policy.
10950	Benjamin, Lanchester	6/24/1998	Patient is being released of medical treatments.
10960	Marvin, Luca	6/24/1998	Received post card mailers
10960	Marvin, Luca	7/15/1998	Very pleased with the atmosphere and office staff
10970	John, Danielson	6/24/1998	Patient has fininacial difficulty
10970	John, Danielson	7/25/1998	Docotr was able to work out payment agreement
10980	Dawn, McAfee	6/24/1998	Patient needs to bring in legal documnts
10990	William, Mckennan	6/24/1998	Patient needs to speak to the doctor before next visit.
11000	Julia, Marion	6/24/1998	Patients need to bring in more signed claim forms

Count = 200