CGM MEDISOFT Reports Professional User's Guide

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CGM MEDISOFT

Practice Management and EHR

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Product

CGM MEDISOFT v30

Corporate address

eMDs, Inc.
10901 Stonelake Blvd.
Austin, Texas 78759
512-257-5200

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Preface

Installation

For instructions on installing CGM MEDISOFT Reports Professional, see the Reports Professional Installation Guide.

Where to Find Help

Online Help

No matter where you are in CGM MEDISOFT, help is not far away. Access the online Help screens to find detailed information on each feature in CGM MEDISOFT. Online Help is available in two different ways:

Main Help File

To access the main help file, click the Help menu and select Help Topics.

The main help file will appear displaying the Contents tab. Use the Contents tab to view categorized topics. Use the Index and Search tabs to find out additional or specific information.

Training

There are various training options available. Please contact your local Value-Added Reseller for information concerning these options.

Independent Value-Added Resellers

There are Value-Added Resellers in your market area who are knowledgeable and efficient in selling, installing, troubleshooting, and supporting your CGM MEDISOFT program. Search the CGM MEDISOFT website at www.medisoft.com for a reseller in your area.

CGM MEDISOFT Versions

Different versions of CGM MEDISOFT provide different levels of reporting.

Reporting Feature	Basic	Advanced	Network Professional	Reports Professional
Export to Microsoft Excel	x	x	x	x
Day Sheets	x	x	x	x
Audit Reports	x	x	x	x

Reporting Feature	Basic	Advanced	Network Professional	Reports Professional
Analysis Reports	6 reports	13 reports	15 reports	15 reports
Aging Reports	2 reports	4 reports	4 reports	4 reports
Collection Reports		x	x	x
Activity Reports			x	x
Aging Power Pack				x
Facility Financials				x
Focus on Chiropractic				x
Focus on Managed Care				x
Focus on Financials				x
Focus on Marketing and Promotion				x
Plus Pack				x

CGM MEDISOFT Reports Professional is an add-on product for CGM MEDISOFT Advanced and CGM MEDISOFT Network Professional, purchased separately. It provides many additional reports not found in CGM MEDISOFT Advanced or Network Professional. In addition, it offers report creation tools for more detailed analysis of your practice. You can find a detailed comparison of the reports found in CGM MEDISOFT Advanced and Network Professional with those provided in CGM MEDISOFT Reports Professional in the section "Report Descriptions " on page 79.

Contents

The three chapters of this guide discuss the components of CGM MEDISOFT Reports Professional:

Component	Description
Instant Reports	Instant Reports is a reporting tool that produces reports using data fields in CGM MEDISOFT that users select on-the-fly. For more information, see "Instant Reports" on page 1.
Reports Creation	This is the core feature of CGM MEDISOFT Reports Professional. Use it to create custom reports for CGM MEDISOFT. Select the data you want to display on a report and then design the report to suit your needs. The query designers give you the ability to precisely control the data that is presented on your reports. For more information, see "Creating Reports" on page 11.
Report Server	The Report Server is similar to CGM MEDISOFT Reports (installed with CGM MEDISOFT) but with the additional functionality of scheduling and delivering reports. Use this to define, schedule, and deliver a report. For more information, see "Automatic Report Generation and Delivery" on page 61.

Chapter 1 - Instant Reports

The Instant Reports application can read selected fields on CGM MEDISOFT and Office Hours data entry screens, and then produce a report instantly.

Here are some ideas of how you can use Instant Reports to make your job easier:

- Print a chart label for a new patient from the Appointment Entry screen in Office Hours.
- Print a patient cover sheet for inclusion in a patient's chart from the patient entry screen.
- Print a mailing label for a referring provider from the patient chart screen.

Instant reports are not a separate, different kind of report created in CGM MEDISOFT Reports. Any report in the CGM MEDISOFT Reports package can be used as an Instant Report; Instant Reports put together the information for the screen that will be read, the report that will be used, the fields that will be used for data filters, and where the report will be sent after it is generated.

Two separate programs are included with CGM MEDISOFT Reports Professional for the Instant Reports feature.

- **Instant Reports Manager** – Use this to create and edit Instant Report definitions. This is where you set up which report will be used, the fields on CGM MEDISOFT and Office Hours data entry screens that will be read for report filters, and the destination printer.
- **Instant Reports Pop-Up** – This program runs automatically every time your computer is started. It waits for you to press the activation hot key or click the program's icon in the System Tray.

Both programs are found by clicking Start, pointing to All Programs, and clicking the CGM MEDISOFT Reports Professional menu.

Instant Reports Manager

To launch Instant Reports Manager:

- Click Start, point to All Programs, point to CGM MEDISOFT Reports Professional, and click **Instant Reports Manager.**

This is the main screen of Instant Reports manager:
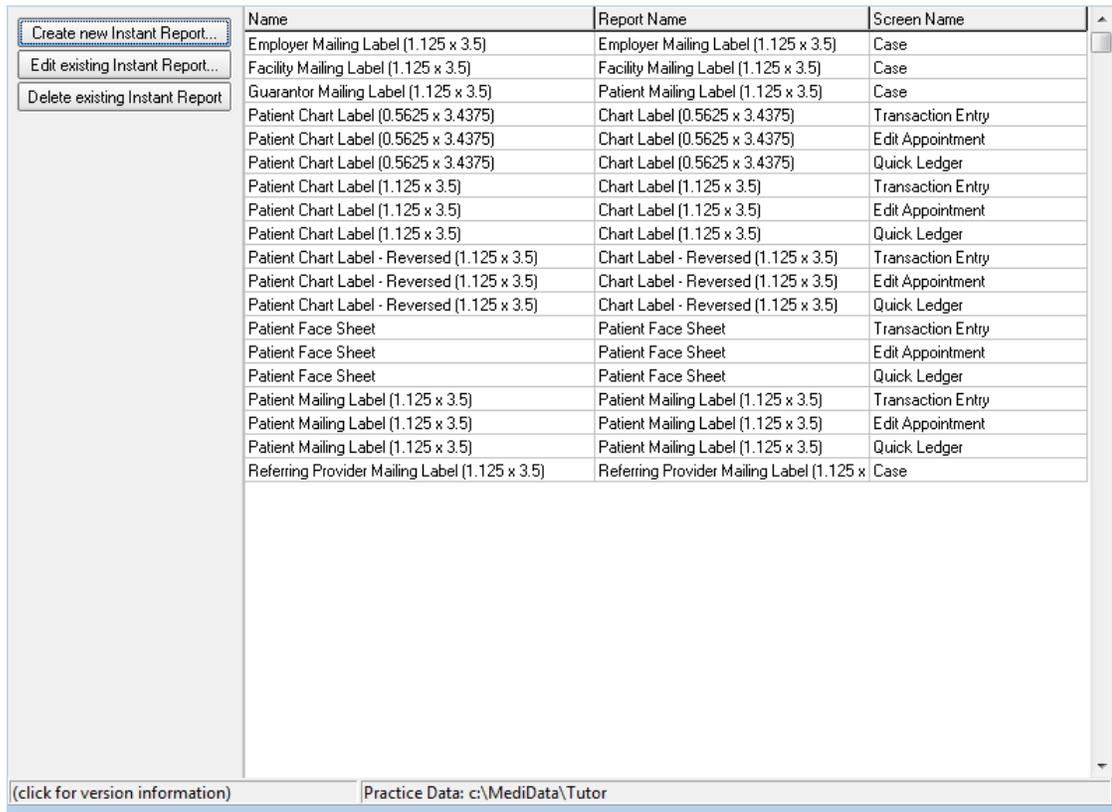
Figure 1. Instant Reports Manager screen

The Instant Reports Manager is used to create and edit Instant Reports settings. Instant Reports comes with several pre-defined Instant Reports definitions.

You have three options on this screen:

Option	Description
Create new Instant Report	Click this to create a new report.
Edit existing Instant Report	Click this to edit an existing report.
Delete existing Instant Report	Click this to delete an instant report.

New Instant Report

Creating an instant report consists of 5 basic steps:

1. Indicate a report name

2. Identify the screen to pull information from.

3. Identify the folder to pull the report from.

4. Choose fields to use as filters for data elements to include on the report.

5. Print the report or export the report to a file.

Click **Create new Instant Report** on the left side menu to start the Instant Report Entry. See Figure 2.
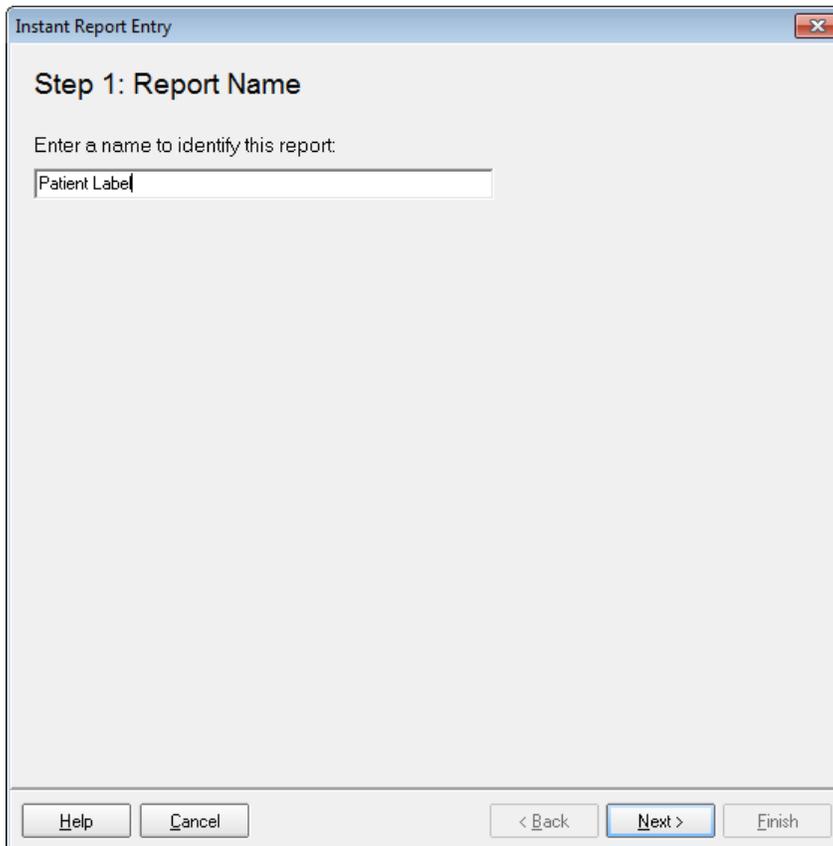
Figure 2. Instant Report Entry screen - Step 1

Step 1: Report Name – Enter the name for this Instant Report. In this example, use an Instant Report to print a patient label from the Office Hours appointment entry screen.
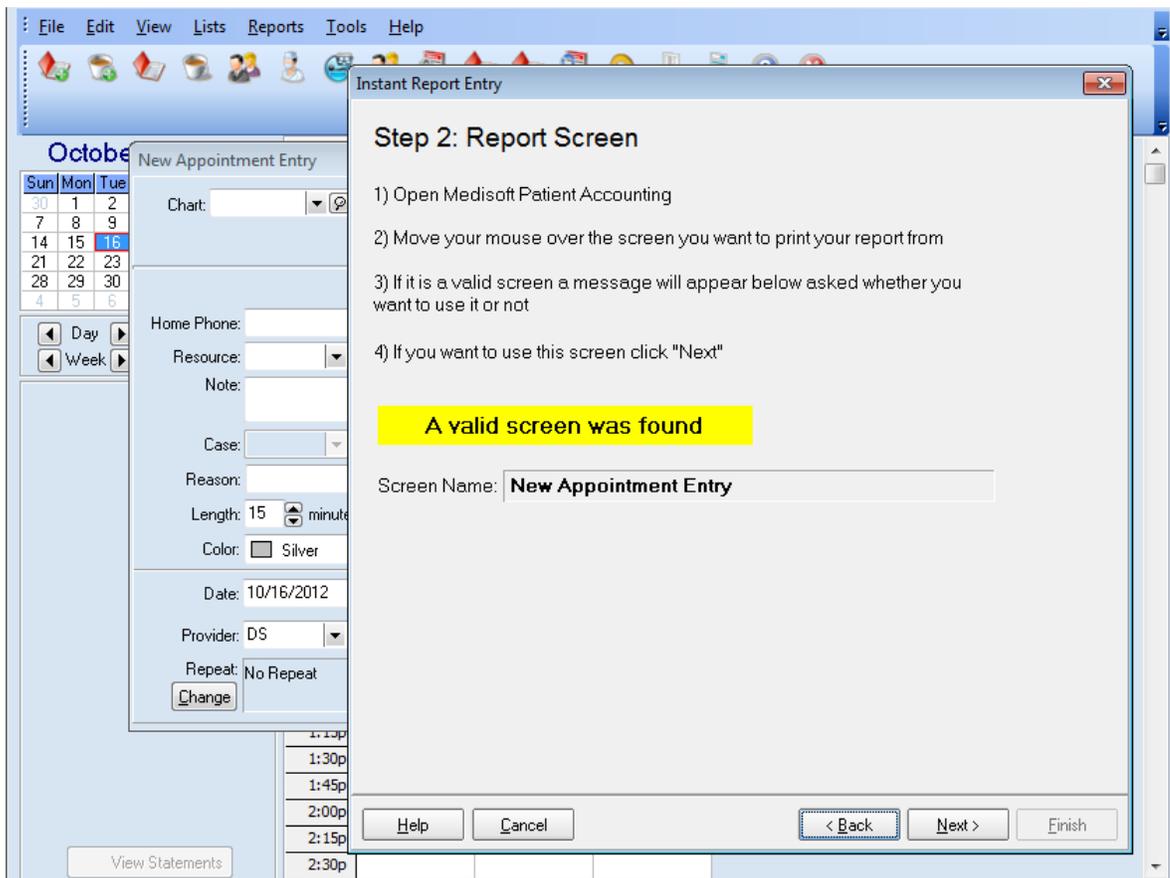
Figure 3. Instant Report Entry screen - Step 2: Report Screen

Step 2: Report Screen – Identify the screen, either from CGM MEDISOFT or Office Hours, to pull information from. To do this

1. Start CGM MEDISOFT or Office Hours.

2. Display the screen you want to use.

3. Move the Instant Reports Entry screen to the top (click the Instant Reports Manager button on the bottom of your screen in the task bar),

4. Place your mouse cursor over the screen you want to use. When a valid screen is found, the Instant Reports Entry screen displays the name of the screen.

In this example, an Instant Reports to print the Appointment Entry screen will be created.

Many fields in CGM MEDISOFT and in Office Hours can be used for the Instant Report definition. The following screens are available to pull information from:

• Transaction Entry

- Claim Management Entry

- Statement Entry

- Worklist Entry

- Quick Ledger

- Quick Balance

- Deposit List

- Deposit Entry

- Case Entry

- Contact Entry

- Office Hours - Appointment Entry

- Office Hours - Main Screen

Step 3: Choose Report – Select the report from CGM MEDISOFT Reports to use for this Instant Report definition. The existing report you choose here is the template for the report you are
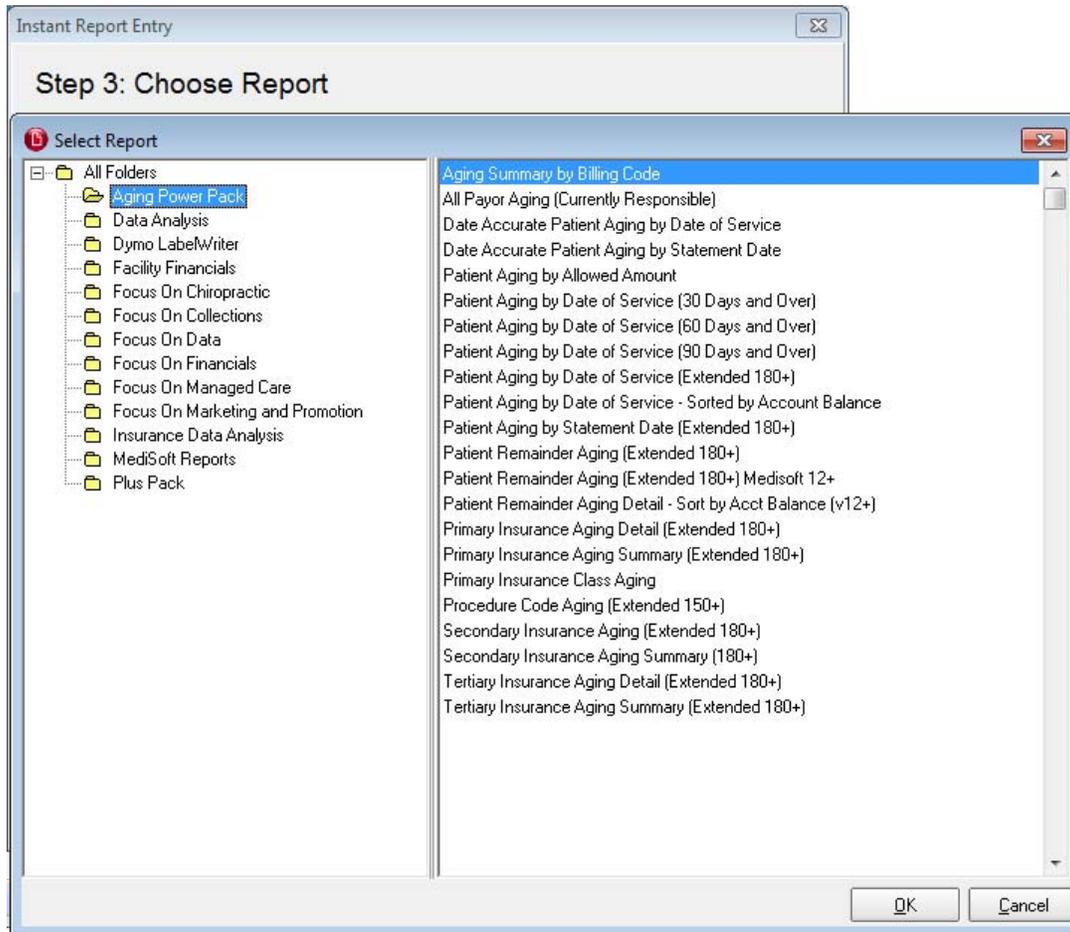
creating.

Figure 4. Instant Report Entry - Select Report screen

Step 4: Link Filters – Select the field or fields on the CGM MEDISOFT or Office Hours screen to use as a report filter. In this example, a patient account label for one specific patient is being created. A patient is identified with a chart number, so you will select the Chart field in the Appointment Entry screen to use as the data filter.

To select a data filter:

1. Move the Instant Report Entry Step 4: Link Filters screen so that you can see the CGM MEDISOFT screen containing the fields you want to filter by.

2. Click the button at the bottom of the screen in the task bar.

3. Place the cursor over the Chart field on the appointment entry screen and "This is a valid field" will display in the wizard screen.

4. Press the F2 key on your keyboard to select this field for a data filter. Leave the other data filters blank.
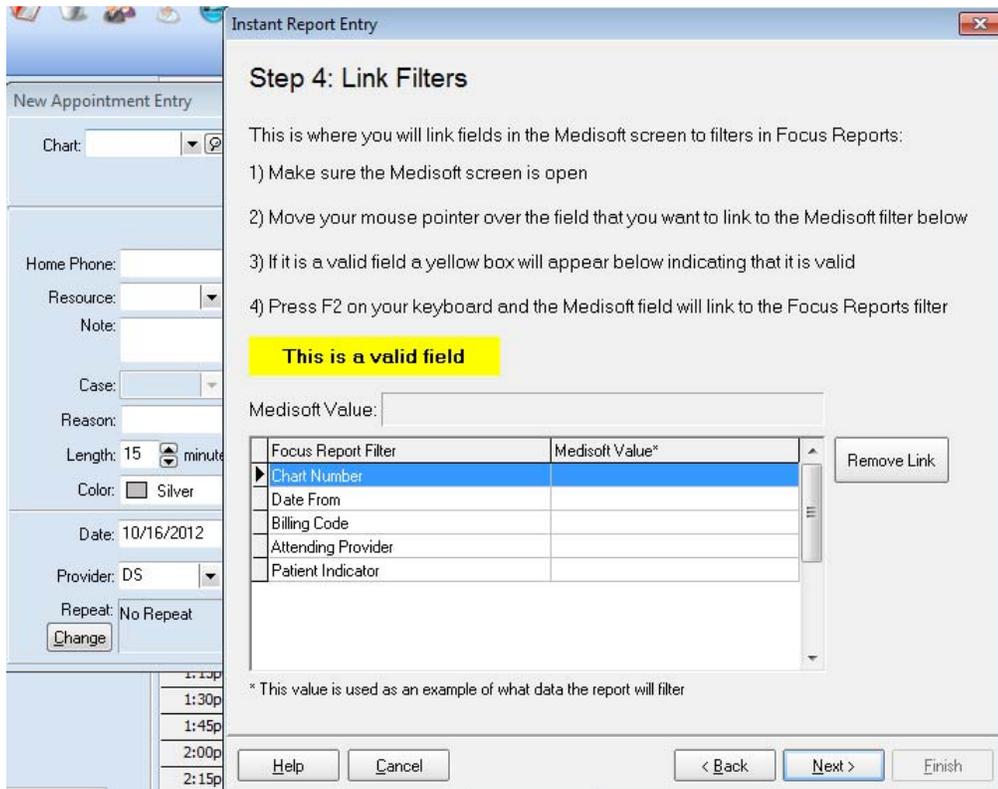
Figure 5. Instant Report Entry - Step 4: Link Filters screen

Note: Not all fields can be selected for use as a data filter. Eligible fields will display "This is a valid field" when your cursor is over the field.

Step 5: Setup Printing – Define what will happen to the Instant Report after it is generated. The report can be sent directly to a printer or previewed before printing. The report can also be exported to a file.

Figure 6. Instant Report Entry - Step 5: Setup Printing screen

After you click Next, the report will be previewed on the screen.

Figure 7. Patient Label

Printing or Exporting an Instant Report

After you have created your first Instant Report, the Instant Reports Pop-Up application will start automatically each time your computer starts. An icon showing that it is running appears in the System Tray in the lower-right corner of your computer display, next to the time:

Figure 8. Instant Reports icon in the System Tray

When the screen you are currently using in CGM MEDISOFT or Office Hours can be used with an Instant Report, the MR icon changes color to green. Otherwise, the icon is red.

Step-By-Step Instant Reports Printing

1. Select the data entry screen from which to print (click the screen, the title bar changes color, and the MR icon in the System Tray turns green to indicate that this screen has an Instant Report assigned to it).
2. Click the green MR icon in the System Tray or press Alt-F7 to display the Instant Reports report selection screen.
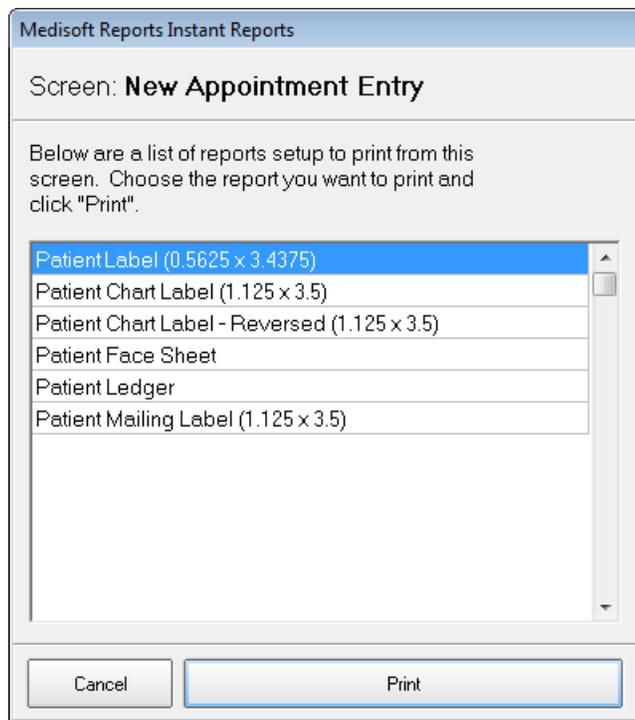
Figure 9. CGM MEDISOFT Reports Instant Reports screen

3. Select the report to produce and click the **Print** button.
4. Generate the report.

Desired Output	Selected option button on the Instant Report Entry - Step 5 Setup Printing screen that causes this
Print the report	I want to print this report without previewing.

Desired Output	Selected option button on the Instant Report Entry - Step 5 Setup Printing screen that causes this
Preview the report	I want to preview this report before printing.
Export the report to a file	Export Report to File

Chapter 2 - Creating Reports

In addition to Instant Reports, CGM MEDISOFT Reports Professional comes with another report tool that you can use to create reports or edit existing reports provided in CGM MEDISOFT Advanced or CGM MEDISOFT Network Professional. This reporting tool is the CGM MEDISOFT Reports Developer. With it, you can select the data fields that you want to include in a report and then design the header, body, and footer of a new report with information tailor-made for your needs. You can also use CGM MEDISOFT Reports Developer to modify the reports that came with CGM MEDISOFT Advanced or CGM MEDISOFT Network Professional.

Launching CGM MEDISOFT Reports Professional

You can launch the program in two different ways:

- In CGM MEDISOFT, On the Reports menu, click **CGM MEDISOFT Reports**.
- Click **Start,** point to All Programs, point to CGM MEDISOFT Reports Professional, and click **CGM MEDISOFT Reports Professional**.

Identifying Existing Reports

The first screen you see when you open CGM MEDISOFT Reports Professional is the Reports Explorer.
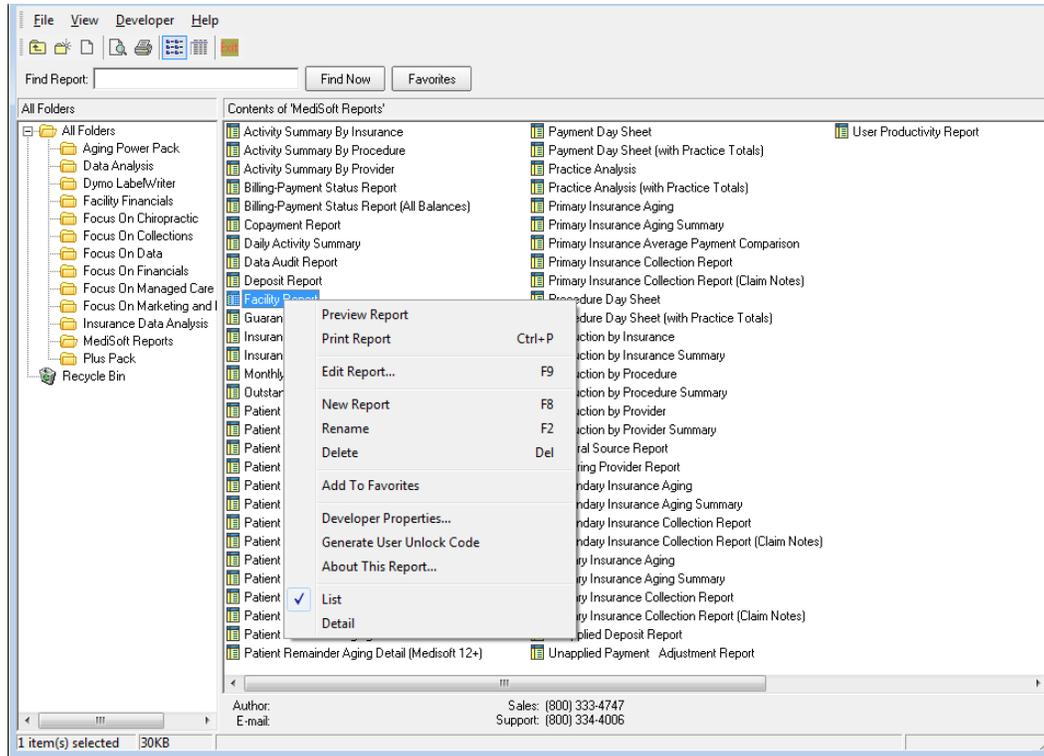
Figure 10. Reports Explorer screen

The Reports Explorer screen works like Windows Explorer. Report categories will appear on the left, while subcategories and individual reports will display on the right. These reports are the standard reports installed with CGM MEDISOFT Reports Professional or reports you created using CGM MEDISOFT Reports Professional.

Creating New Reports

Select New Report or Edit Report from the File menu of the Reports Explorer screen in CGM MEDISOFT Reports Professional. The Report Developer screen appears. This is the screen you will use to create a new report or edit an existing report.
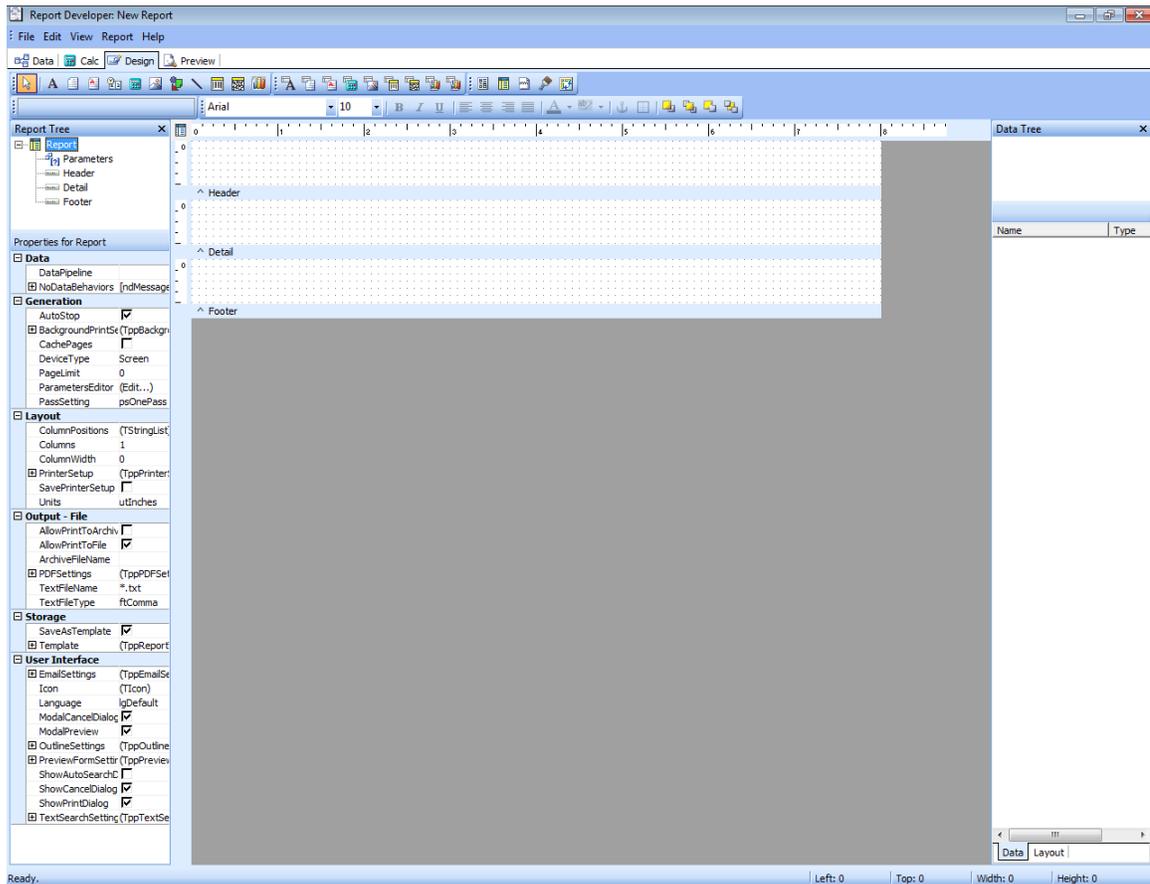
Figure 11. Report Developer screen

The Report Developer screen has four primary work areas, all designated by tabs in the developer screen:

Workspace Area on Report Developer screen	Purpose
Data	Retrieve data from CGM MEDISOFT files for inclusion in a report. For more information, see "Data Workspace" on page 14.
Calc	Conduct advanced data manipulation. For more information, see "Calc Workspace" on page 32.

Workspace Area on Report Developer screen	Purpose
Design	Set up the visual layout of a report. For more information, see "Design Workspace" on page 35.
Preview	Preview the report as it is developed. For more information, see "Preview Workspace" on page 50.

To create a new report:

1. Use the Data tab to create a query that will determine the data that is included in the report.

2. Use the Design tab to arrange fields of data on the report, create labels for columns of data and sections of the report, and add header and footer information.

3. Use the Preview tab to see how your report will look.

4. Establish developer properties, such as the author of the report and a password to access it.

5. Export the report as a file for use on other computers or create a CD/DVD for the report.

Data Workspace

The Data tab is used to gather the information from your CGM MEDISOFT practice. This data gathering is called a *query*.

CGM MEDISOFT Reports Developer has two ways to build a query: The Query Wizard and the Query Designer. The Query Wizard is the simplest option to use. Use the Query Designer to edit an existing query or access more comprehensive query capabilities, including the ability to edit the code created for the query and enhanced calculation, filtering, and sorting capabilities. Use these methods to assemble all of the data that you want to include on your new report.

To use the...	see...
Query Wizard	"Using the Query Wizard " on page 14.
Query Designer	"Using the Query Designer " on page 22.

Using the Query Wizard

The Query Wizard is a simple, step-by-step tool that walks you through creating a query for a new report.

To use the Query Wizard:

1. Select the **Data** tab on the Report Developer screen.

2. On the File menu, click **New.** The New items screen will appear.
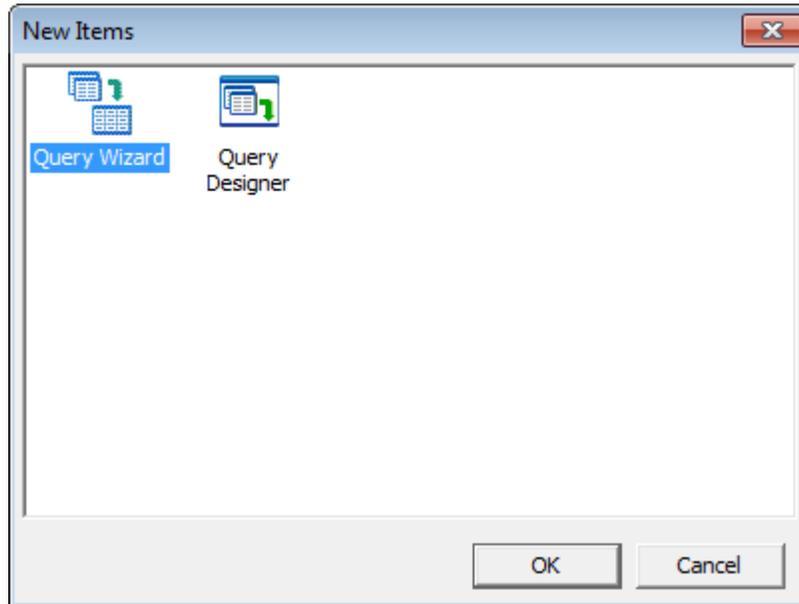
Figure 12. New Items screen

3. Select Query Wizard and click **OK** to start the wizard.
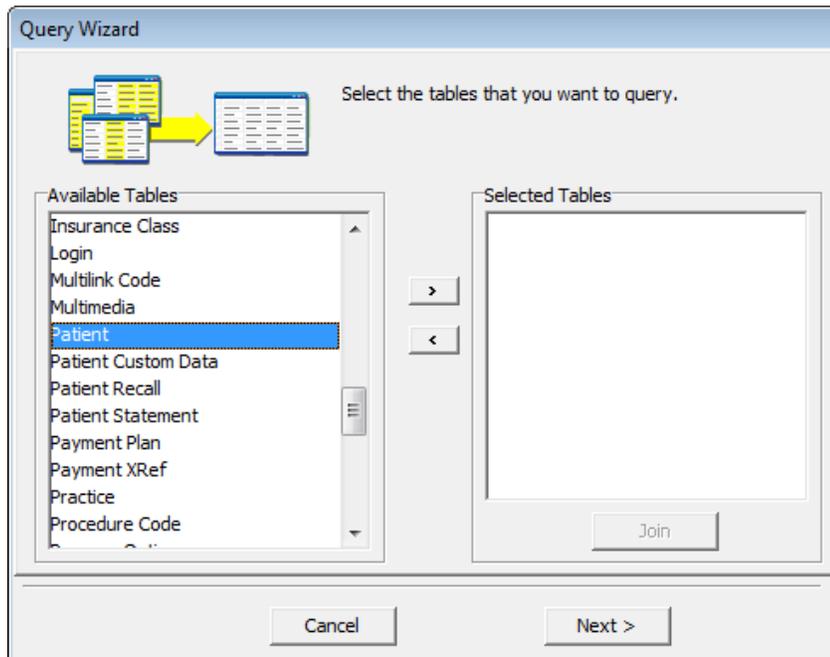
Figure 13. Query Wizard screen - Select Tables

4. Select the table(s) to include in the query by highlighting one on the left and clicking the top arrow. Tables contain the data for the practice (patient, facility, and so on). It's best to select the primary table first and then the secondary tables that will supply supplementary information. Example: If you are building a patient list report, select the Patient table. To build a transaction-based report that also needs to include patient and case information, select the

Transaction table and then select the Patent and Case tables. In this example, the Transaction and Patient tables are selected.
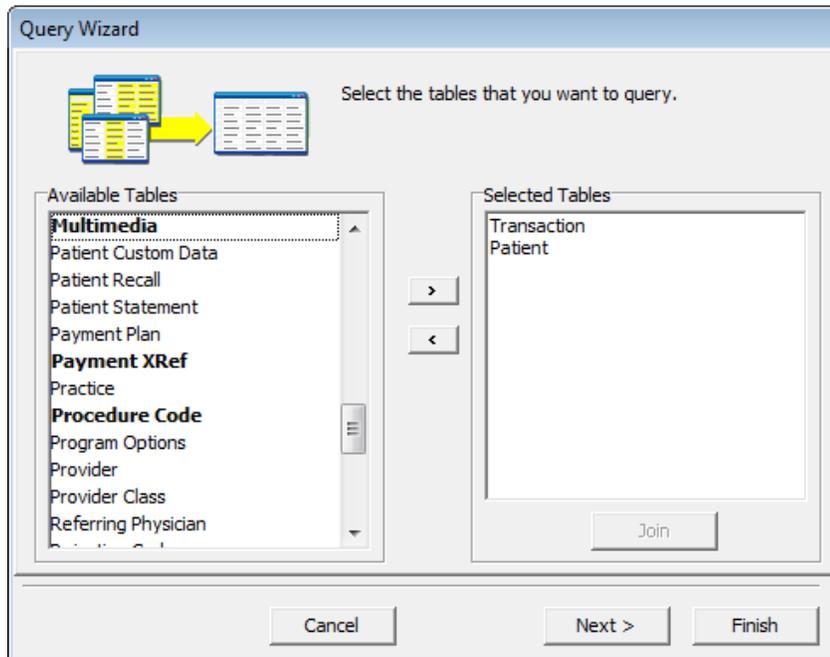
Figure 14. Query Wizard with Transaction and Patient Tables selected

CGM MEDISOFT Reports Developer needs to know how these tables are related. A **Join** relates the tables and allows any field from the Transaction table and any field from the Patient table to be used in a report.

Be sure to select tables that have data you might want for the header and footer of your report, such as Practice Name.

5. Select the transaction table in the right pane of this screen and then click the **Join** button. The Join Table screen appears.

Figure 15. Join Table screen

The Transaction and Patient tables are related only by the patient Chart Number field. You can create joins by selecting one field from the Patient table and one field from the Transaction table and then clicking the **Add** button.

6. Click the **OK** button when you are done creating joins.
7. Click the **Next** button.
8. Select **Choose Fields**.
9. Choose the fields to include in the query. These would include the data you want in the body of the report, as well as Header fields, such as Practice Name.

eMDs recommends that you include only those fields needed for your report. Retrieving unnecessary fields will affect the query's performance.
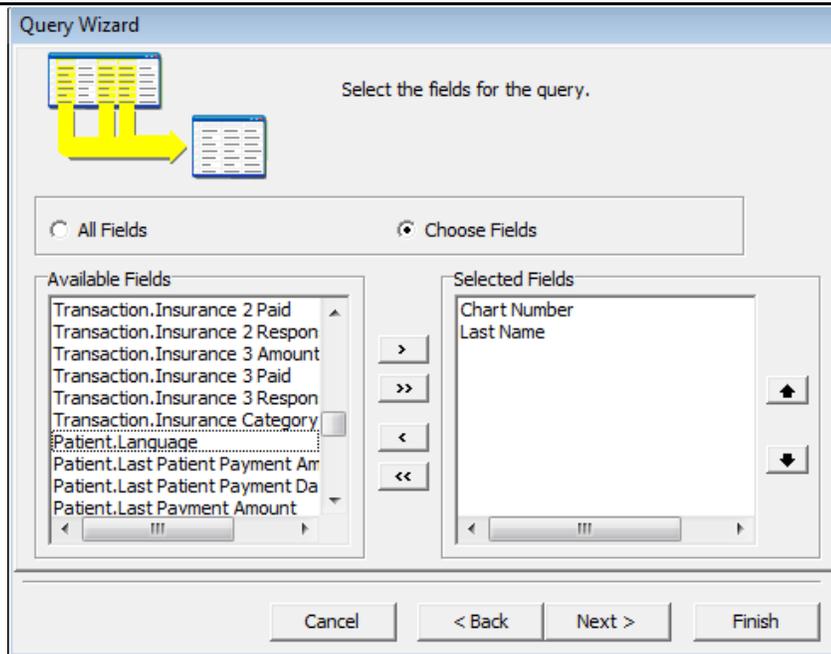
Figure 16. Query Wizard screen with Selected Fields

10. Click the **Next** button when you are done.
11. Select **Add Calculations**.
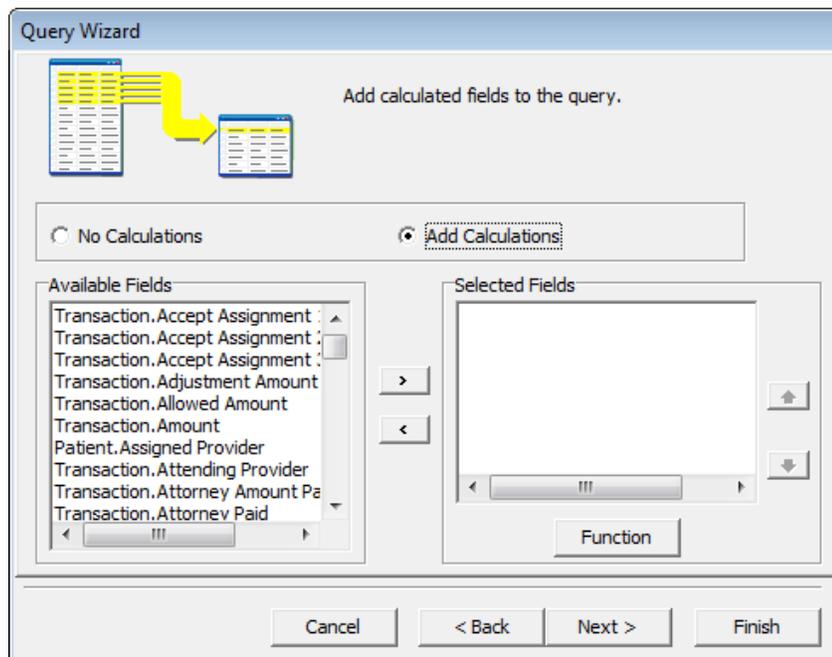
Figure 17. Query Wizard screen - Calculations

The most common use for a calculated field screen is to total or subtotal an amount field.

12. Select Transaction.Amount from the field list and the Calculated Fields screen appears:
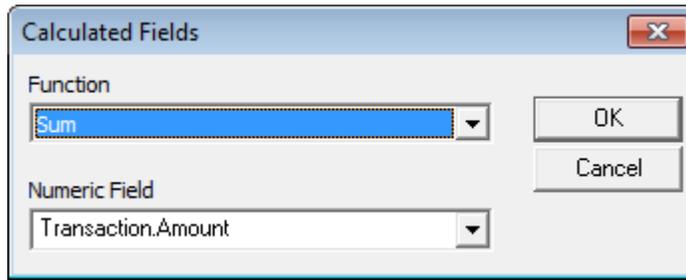
Figure 18. Calculated Fields screen

13. Select the calculation function to perform from the Function drop-down list.
14. Click the **OK** button.
15. Click the **Next** button. The Query Wizard - Grouping screen appears.
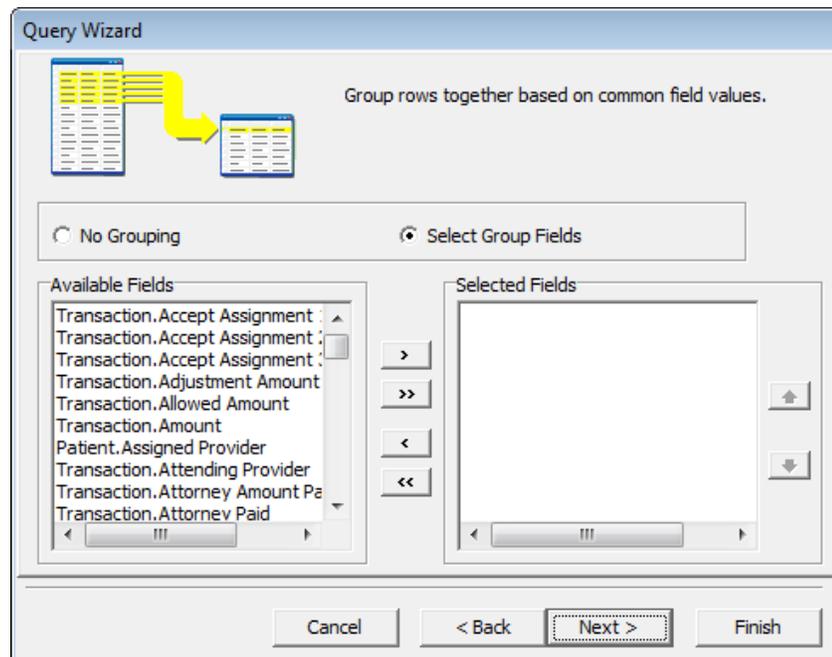
Figure 19. Query Wizard - Grouping

Grouping allows the query to summarize information. The application can group in the query or in the visual designer. When grouping the information in a query, all fields selected for inclusion must also be selected for grouping, and they must be listed in the same order.

Grouping in the visual designer (on the Design workspace) is more appropriate when you want to print subsections in the final report, as in a ledger-style report.

16. Click **Select Group Fields**.
17. Add Transaction.amount to the Selected Fields section.

18. Click the **Next** button. You can limit the rows (data items) that will appear in the report.
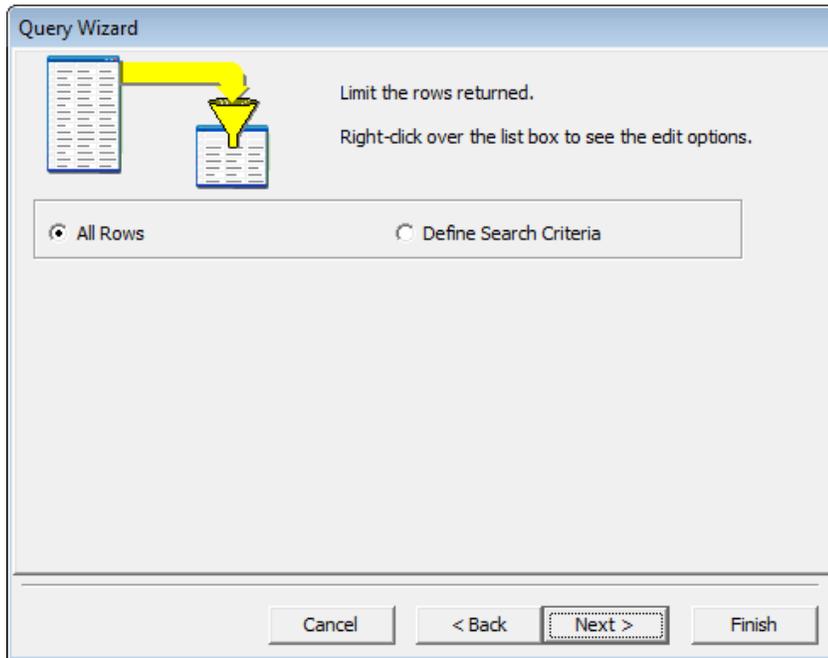
Figure 20. Query Wizard - Limit Rows screen

If you select Define Search Criteria, you can specify items to limit the data that is returned for the report; for instance, if you want to limit the report to patients who live in a certain city or zip code.

19. Select All Rows and click the **Next** button.
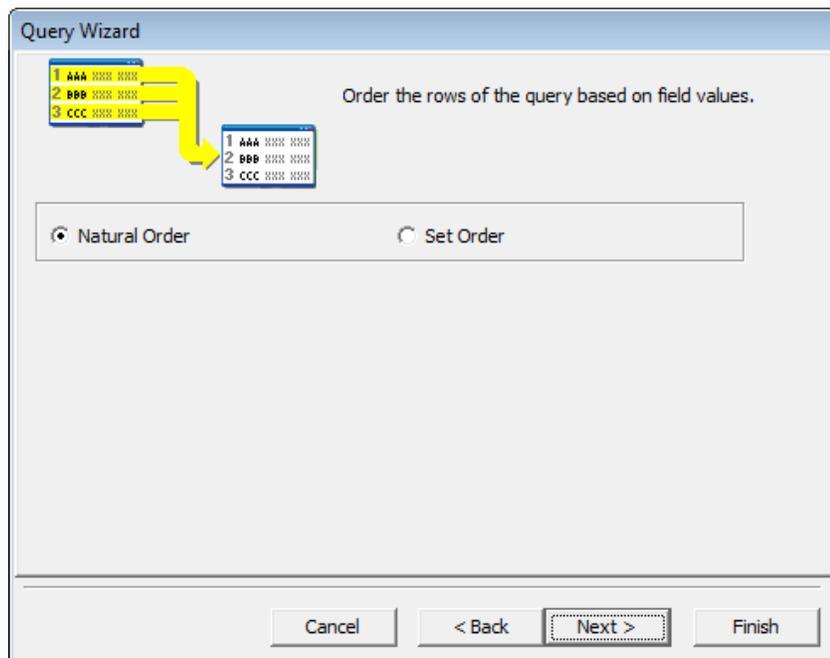
Figure 21. Query Wizard - Order screen

20. Now, you can determine the order of the rows of data in the report. The data in the query's result can be returned in its natural order of occurrence in the primary table or it can be returned sorted. The Order screen allows the query sort order to be defined: Records in the transaction table are normally entered in chronological (date) sequence, but not always. It will be most effective to sort the result table for a transaction query in chart number or date-from sequence.

21. Select **Set Order**.

22. Highlight Transaction.ChartNumber in the Available Fields box and click the top arrow to move it to the Selected Fields box.
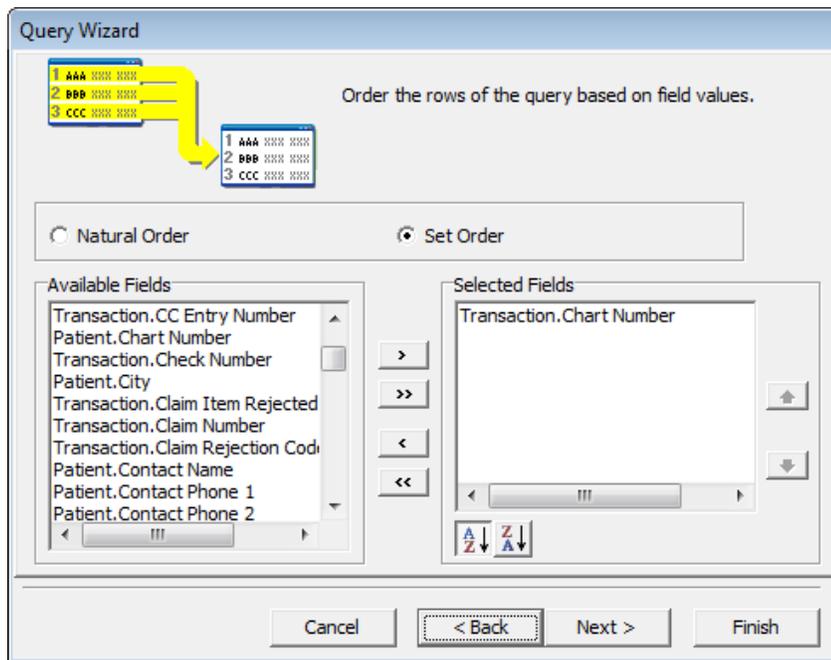
Figure 22. Query Wizard - Set Order

23. Click the **Next** button.

24. Enter a Name for your new query
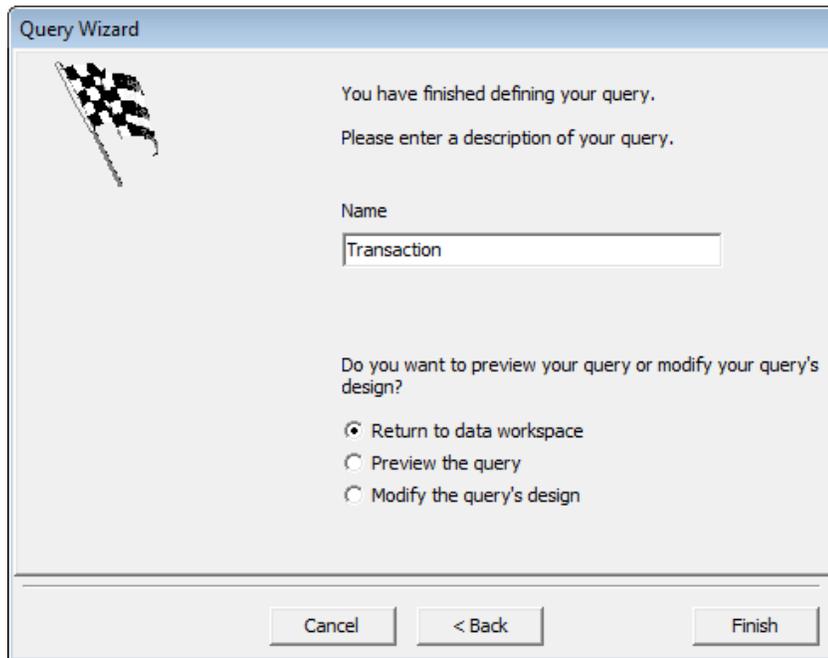
Figure 23. Query Wizard - Query Name

25. Select **Return to data workspace**.
26. Click the **Finish** button.

Figure 24. Data Workspace with completed query table

Using the Query Designer

The Query Designer is another tool for creating data queries. Although the Query Wizard is simpler, the wizard limits the type of query that can be built. You have more capability with the Query Designer.

To open the Query Designer:

1. On the File menu of the Data workspace tab of Reports Developer, click **New.**
2. Select **Query Designer**. The New Items screen appears.
3. Click the **OK** button**.**

Query Designer screen

Tabs exist for each function available in the Query Designer. Note that each tab corresponds to a screen or set of screens found in the Query Wizard. Essentially, you use the Query Designer to do all of the report creation via tabs that you did in the step-by-step Query Wizard.
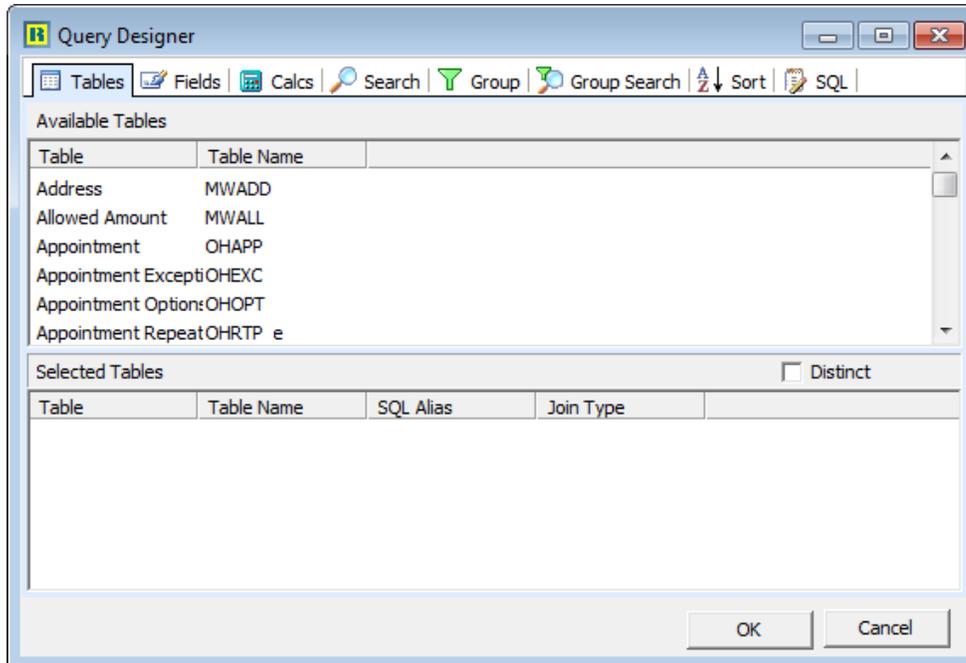
Figure 25. Query Designer screen

Tables Tab

Select the data table or tables that will be used in the query.

To select a table:

1. Find it in the Available Tables section of the tab and double-click it. It will appear in the Selected Tables section of the tab. Select the primary table for the query first. The primary table is where the key information for the report is found. In a financial report, this will likely be the transaction table.

2. Select the secondary table or tables. Selecting the Patient table will allow patient names to be associated with the transaction information in the first table selection.
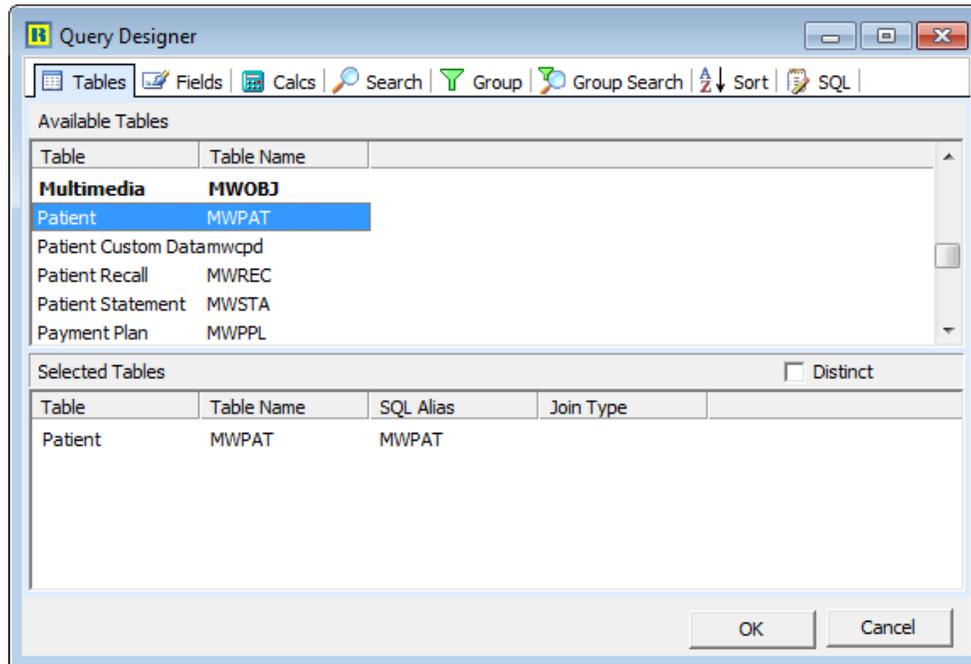
Figure 26. Query Designer screen - Patient Table selected

When you select a secondary table, the Join Tables screen will appear and allow you to specify how the information is linked, just as in the Query Wizard. Tables need to be related to each other to allow information from one table to be matched with information in another. Specifying this relationship is called a **Join**. You can join only two tables together at once; however you can join the second to the first and then the third to the second, and so on. Normally, CGM MEDISOFT Reports Developer will automatically create a join but you can change it.

Joins will not only allow the contents of tables to be related, but they also control which records are retrieved for the result. From the Join Type drop-down, you can select different types of joins. There are four Join Types in CGM MEDISOFT Reports Professional:

Join Type	Description
Inner	Use this type to retrieve records from a table only if there is a matching record from the joined table. Inner joins are more common than others, and the application will automatically create in Inner join when you add more than one table to a query.
Right Outer	Use this type to retrieve all the values from an inner join plus all values in the right table that do not match to the left table.
Left Outer	Use this type to retrieve all the values from an inner join plus all values in the left table that do not match to the right table.
Full Outer	Use this type to combine the effect of applying both left and right outer joins. Where records do not match, the result will have no values for every column of the table that lacks a matching row. For those records that do match, a single row will be produced (containing fields populated from both tables).

Create a join between the Patient table and the Transaction table like this:

1. Click one table in the Selected Tables screen to highlight it.
2. While the Reports Developer will normally automatically create a join between tables, to manually join tables or verify a join, click the Add button.
3. The Join Table screen will appear.
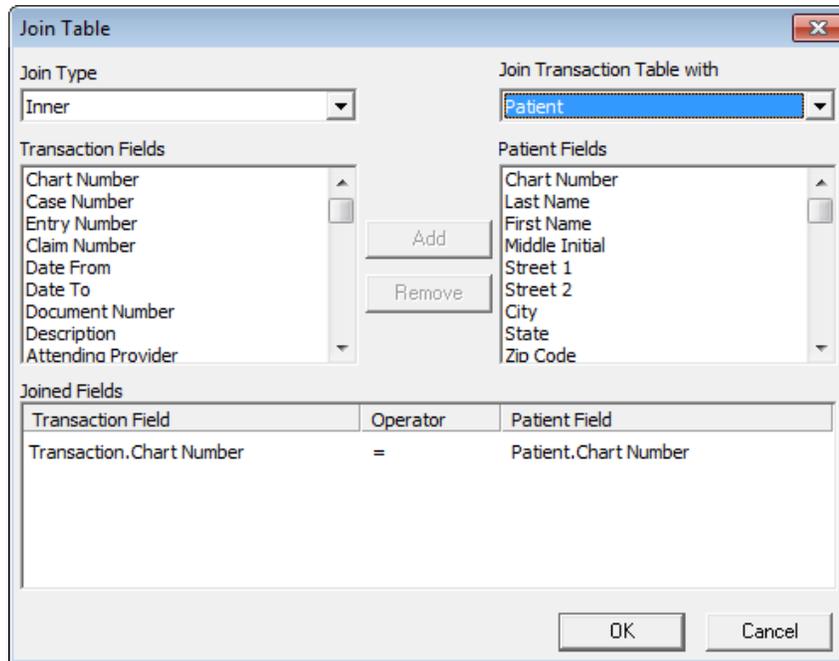
Figure 27. Join Table screen

4. On the right are the fields from the Patient table, and on the left are the fields from the Transaction table. Different fields will be listed depending on the tables that you are joining. Selecting a field on the left and a field on the right will allow a join to be added.

Select the Distinct check box on the Tables tab if you want to suppress duplicate values when you choose the fields that will be part of your query.

Do not click the OK button until you have completed all of the tabs. You may get an error if you do.

Fields tab

Select the fields that will be used for the report. It is important that only the necessary fields are selected. Selecting unneeded fields will affect the speed of a query because of the quantity of data retrieved.

Select a field by double-clicking the field in the Available Fields section or dragging and dropping a field into the Selected Fields section.
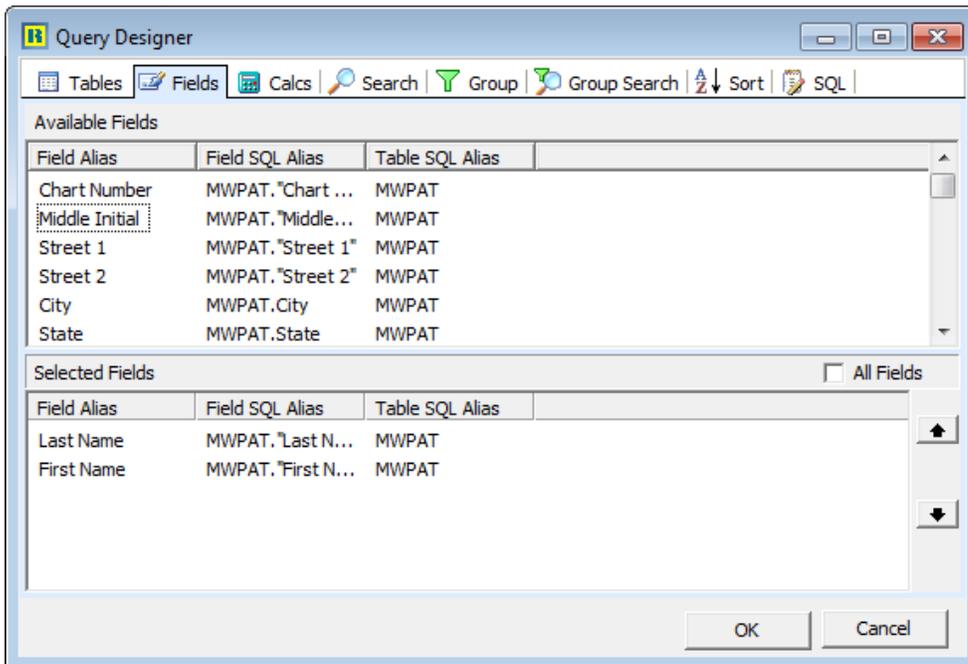
Figure 28. Query Designer - Fields tab

Calcs tab

This tab is used for performing simple mathematical operations on query data. The Calcs tab in the Query Designer has different uses than the Calc workspace in the Reports Developer, however.
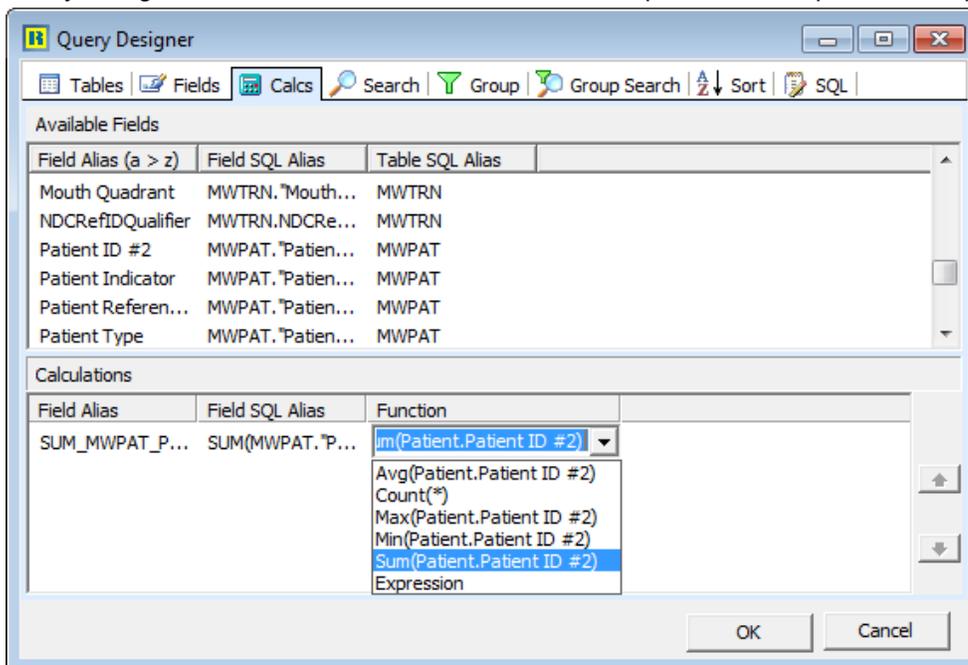
Figure 29. Query Designer screen - Calc tab

Standard functions available in a calculation include Average, Count, Maximum, Minimum, and Sum.

For those familiar with SQL (Structured Query Language), the Expression selection allows an SQL statement to be entered. Supported SQL statements include these:

- Aggregate column functions
- Date/time functions
- Math functions
- String functions

A complete listing of the SQL functions supported is available in the Advantage Database help file, or the ADS_SQL.pdf file, found in C:\Program Files\CGM MEDISOFT\Bin\Help

To perform a calculation on a field

1. Double-click the field to add it to the Calculations section of the tab.
2. Click the value in the Function column and select a calculation from the drop-down list.

Search tab

Use the Search tab to select or limit the data to be included in a report. Double-click a field in the Available Fields section or drag and drop a field into the Criteria section to create a data filter for a query.
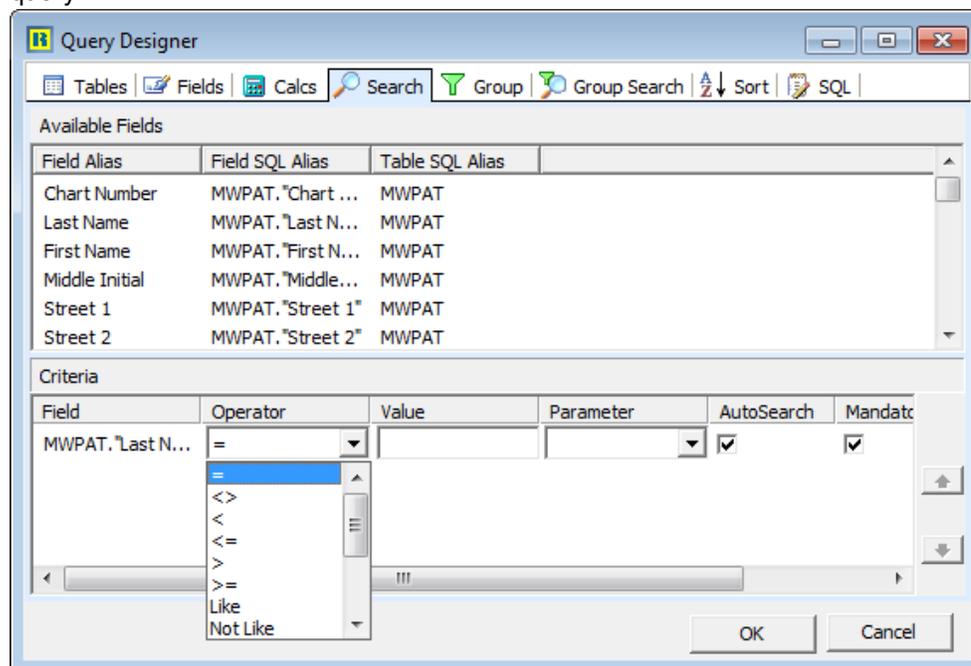
Figure 30. Query Designer - Search tab

The *Operator* drop-down list is used to select the comparison method for the data filter.

Operator	Type of Operator
= (equal)	Use this as a standard comparison.
<> (not equal to)	Use this as a standard comparison.
< (less than)	Use this as a standard comparison.

Operator	Type of Operator
<= (less than or equal to)	Use this as a standard comparison.
> (greater than)	Use this as a standard comparison.
>= (greater than or equal to)	Use this as a standard comparison.
Like	Use this for a wild card search. It is used to find information anywhere in a field. To specify a wild card search, use these examples: • ab% will select a word in a field that begins with "ab" and has any number or type of characters following the %. • ab will select a word in a field ending with "ab". • %ab% will select a word in a field with ab occurring anywhere in the field. • The underscore (_) wildcard is used like the percent (%) wildcard, but the underscore matches a single character rather than any number of characters. • Enclosing wildcard characters in square brackets ([ ]) will match any of the characters in the brackets.
Not Like	Use this for a wild card search. It is used to find information anywhere in a field. To specify a wild card search, use these examples: • ab% will select a word in a field that begins with "ab" and has any number or type of characters following the %. • ab will select a word in a field ending with "ab". • %ab% will select a word in a field with ab occurring anywhere in the field. • The underscore (_) wildcard is used like the percent (%) wildcard, but the underscore matches a single character rather than any number of characters. • Enclosing wildcard characters in square brackets ([ ]) will match any of the characters in the brackets.
Between	Use this as a Range operator. Allows you to specify a range of information.

Operator	Type of Operator
Not Between	Use this as a Range operator. Allows you to specify a range of information.
In List	Use this to cause a list box to appear during report creation for selecting data.
Not In List	Use this to cause a list box to appear during report creation for selecting data.
Blank	Use this to select blank fields.
Not Blank	Use this to select fields that are not blank, or empty of data.

Entering search criteria in the Value field stores that criteria with the report definition, giving a default data selection filter.

- Select the **Auto Search** check box to ask the data selection question at print time.
- Select the **Mandatory** check box to require an entry in the search field before a report can be printed.
- Select **Show All** to set the default data filter to include all records.

Group tab

The Group tab summarizes records in the result table for a query. The effect of grouping is also to eliminate duplicate records.
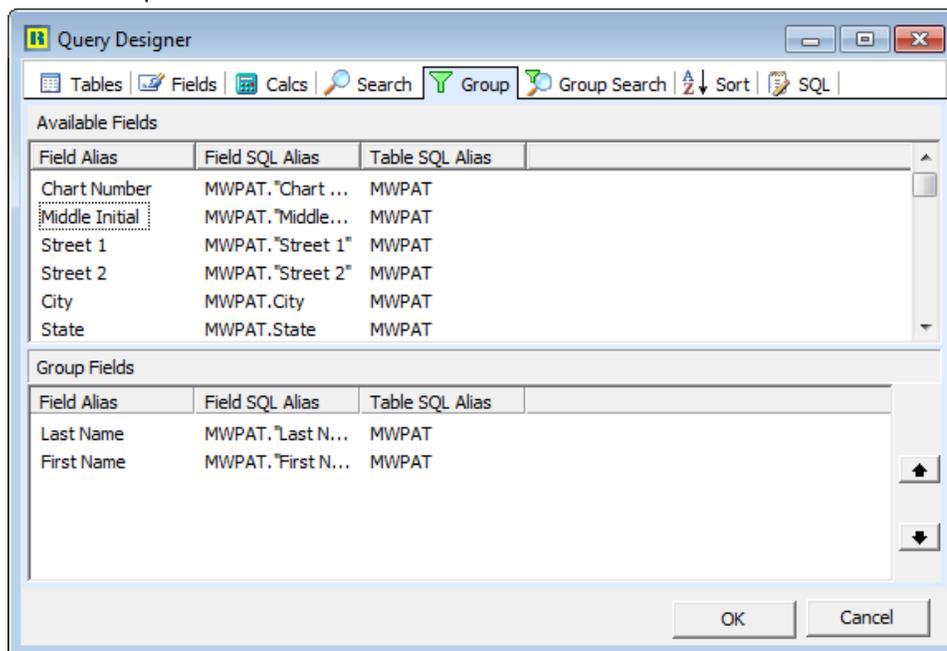
Figure 31. Query Designer screen - Group tab

All fields selected on the Fields tab must appear on the Group tab, and in the same sequence. For data to be grouped (summarized) in a result table, all fields specified for grouping must match exactly. If grouped data includes an amount field that must be totaled, use the Calcs tab to create a calculated field to summarize the amount.

Sort tab

The sort tab allows the records in a result table to be ordered. Double-click or drag and drop a field from the Available Fields section into the Sort Fields section. The default sort order is ascending. Select the Desc (z > a) check box to reverse the sort order to descending.
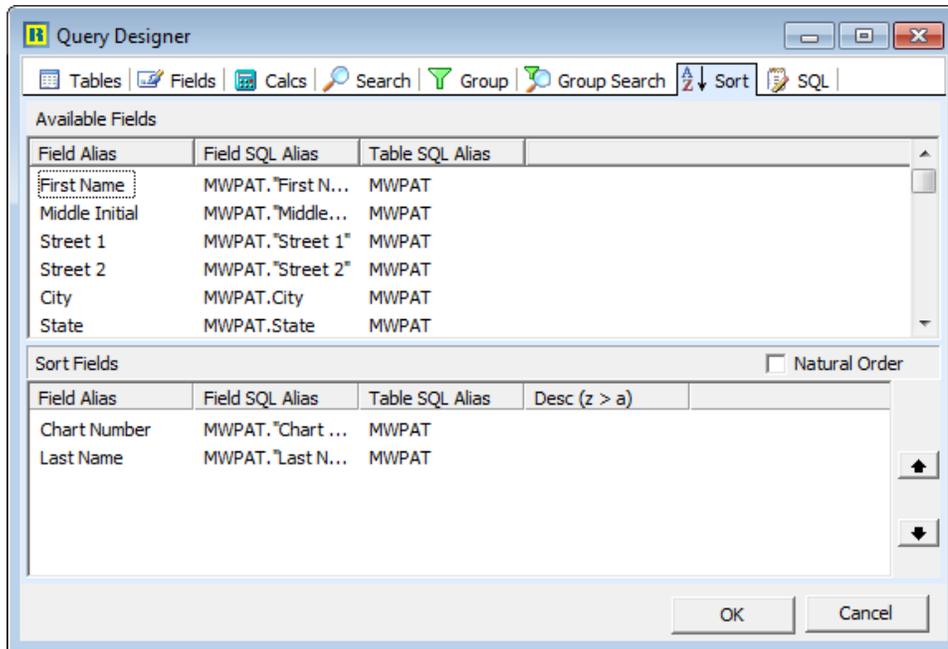
Figure 32. Query Designer - Sort tab

SQL tab

This tab shows the SQL statements produced as a result of the entries made in the Query Designer screen. The name of the query (data pipeline) may also be changed in this screen.

Displayed here will be the SQL statement that will be executed to produce a result table for your report.
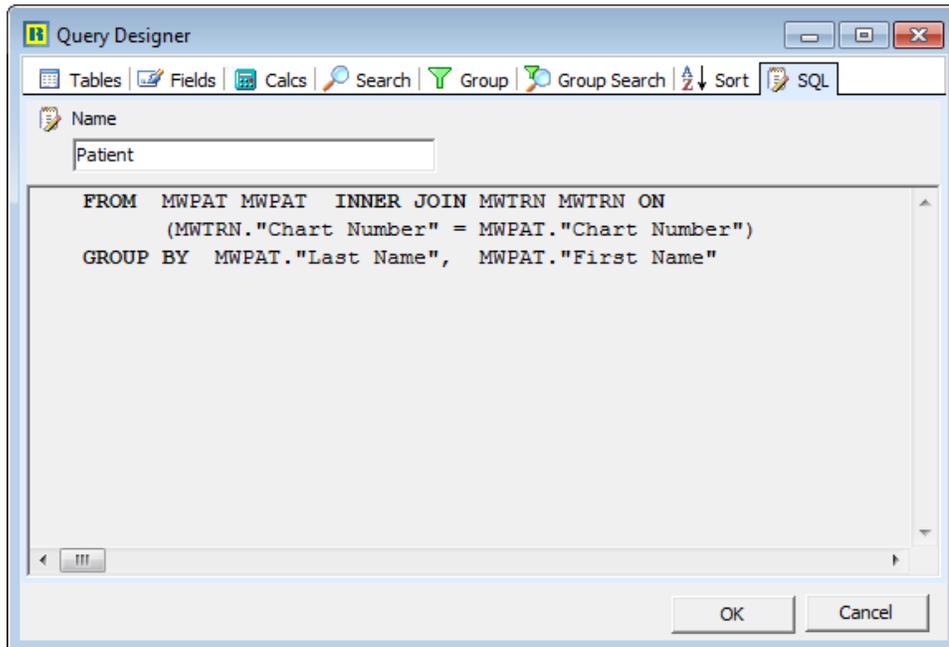
Figure 33. Query Designer - SQL tab

CGM MEDISOFT Reports Developer will allow the SQL statement to be directly edited, but avoid this if it is possible to produce a desired result with the Query Designer. To edit the SQL statement, right-click the SQL screen and select Edit SQL from the menu.

When an SQL statement is edited, certain standard data query features of the developer are disabled:

- There will be no opportunity to enter data filters at print time. Your SQL query must perform all necessary data selection itself.
- Queries may not be linked.

A Completed Query

After completing and saving a query from the Query Wizard or the Query Designer, the query screen will appear in the Data workspace like this:
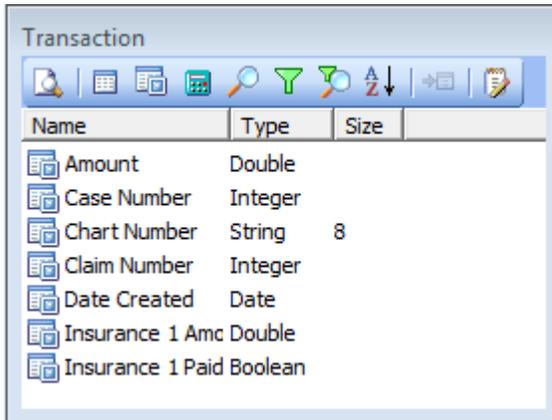
Figure 34. Transaction screen with Completed Query

In addition to displaying the fields of the query, the query screen has a toolbar that gives you direct access to the tabs of the Query Designer:

Icon	Description
	Use this icon to run the query and preview the result table. This is an excellent diagnostic tool to use when your report is not working as intended.
	Use this icon to open the Query Designer and displays the Tables tab.
	Use this icon to open the Query Designer and displays the Fields tab.
	Use this icon to open the Query Designer and displays the Calcs tab.
	Use this icon to open the Query Designer and displays the Group tab.
	Use this icon to open the Query Designer and displays the Search tab.
	Use this icon to open the Query Designer and displays the Tables tab.
	Use this icon to link this query to another query. This button is grayed until there are at least two queries displayed in the Data workspace. Click the **Link** icon in the toolbar of the query you want to set as the Detail query. The link screen is similar to a Join screen.
	Use this icon to open the Query Designer and displays the SQL tab. Click this button to Import or Export a Query.

Calc Workspace

There are two different ways of performing simple mathematical functions in CGM MEDISOFT Reports Professional. First, you can use the Query Wizard or Designer to make simple calculations. These are the easiest way to perform mathematical operations for a report. Second, the Calc workspace (Calc tab in CGM MEDISOFT Reports Developer) can also be used for

mathematical operations. In addition to mathematical operations, data manipulation and logic operations may be performed in the Calc workspace, making it a more powerful feature than that in the Query Wizard or Designer.
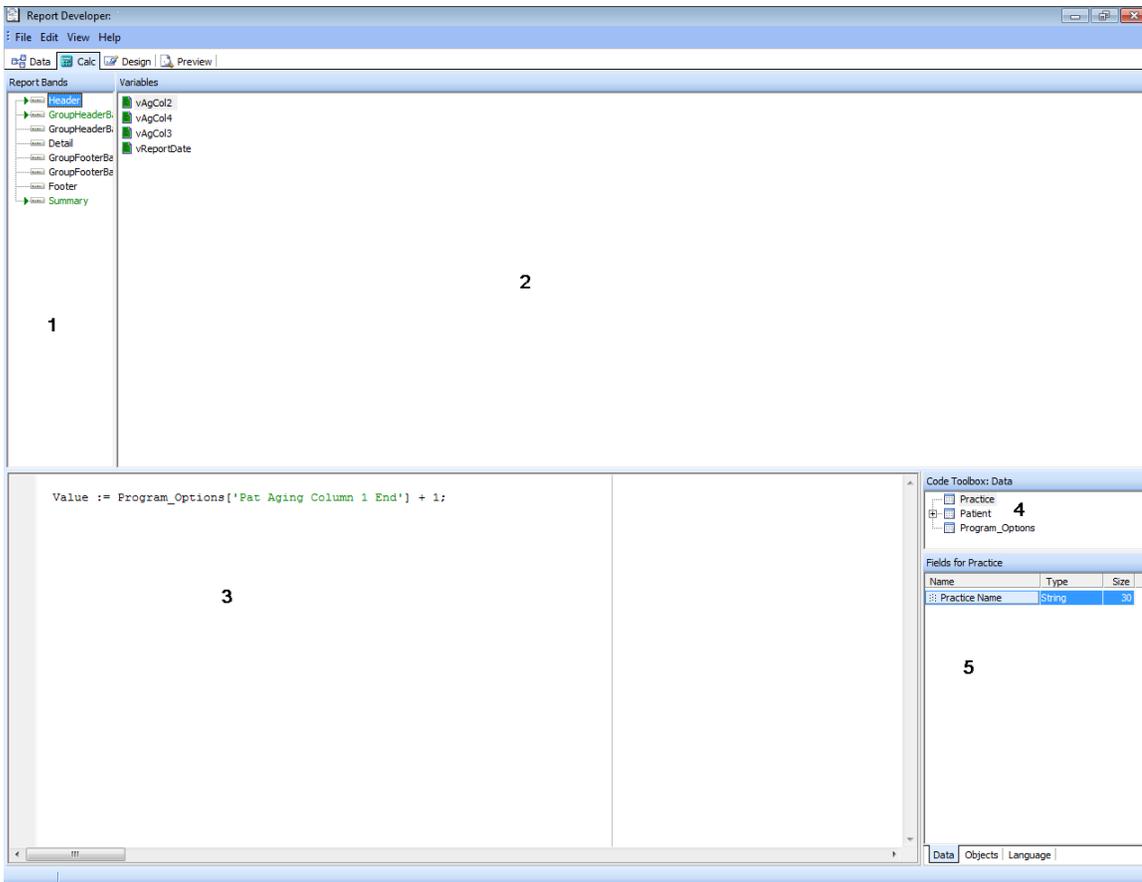
Figure 35. Report Developer screen - Calc tab

Use the Calc workspace to control elements of a report. Here are descriptions for each part of the Calc workspace, as marked above:

Section of the screen	Description
1) Report Bands	Use the tree to display all the objects in your report including header, detail, and footer "bands," groups, and events for the entire report. These are the main sections of the report, its "event" categories. Clicking a report object (such as Header) displays its events (actions taken based on the code) in the Variables area (area 2).
2) Variables	Use this area to display all the events for the selected report object from area 1. When an event is selected, any RAP code entered for the event is displayed in area 3.

Section of the screen	Description
3) Code Edit and Display	Use this section to display the code.
4) Code Toolbox	Use this to see the data tables included in the report.
5) Fields, Objects, Code	Use this section to see three types of objects displayed in these areas: • Data pipelines • Report objects • Code. Select the Data, Objects, or Language tab in area 5 to display the data fields in a query, the objects in a report, or code shortcuts. Objects displayed in area 5 can be dragged and dropped into the code entry and edit area (area 3).

Design Workspace

Click the Design tab in CGM MEDISOFT Reports Developer to display the Design workspace. This area is used to organize and arrange the visual layout of the report.
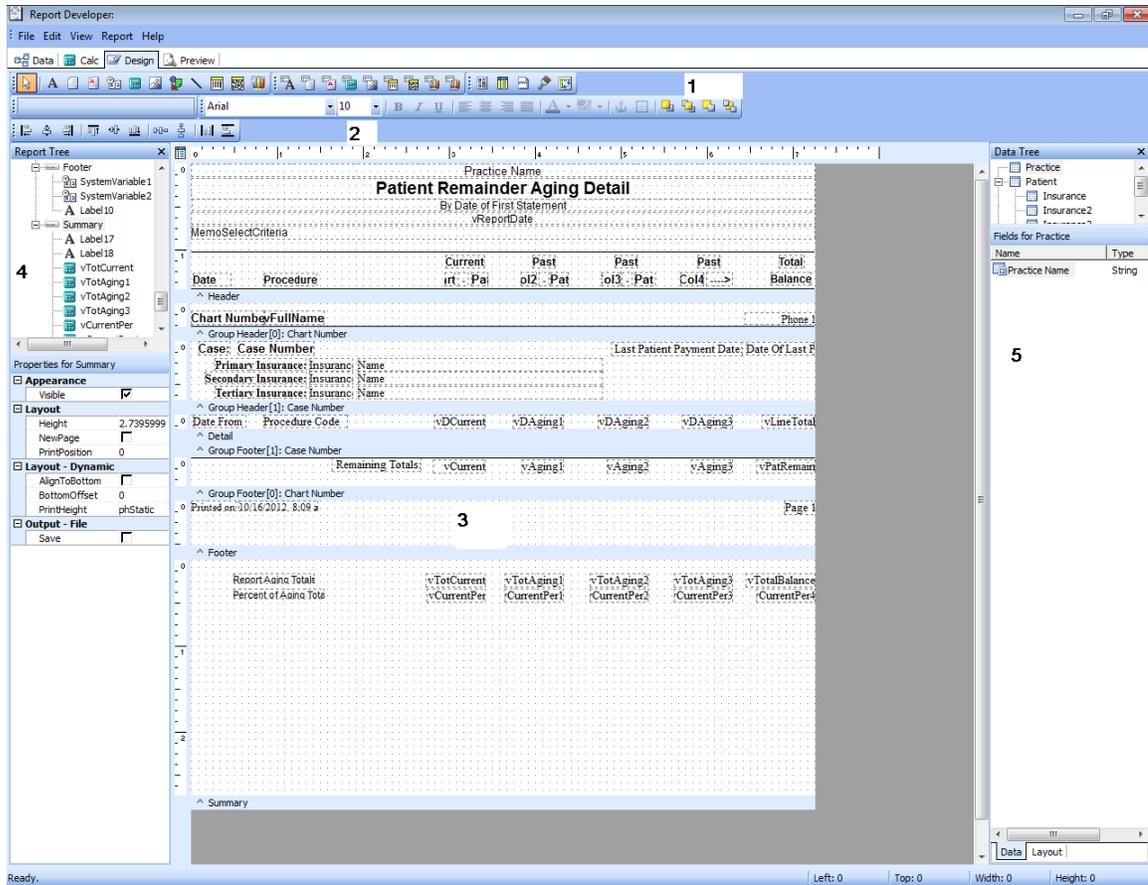
Figure 36. Report Designer - Design tab, with sections numbered

Below is a brief description of the sections of the screen:

Section of the screen	Description
1) Toolbars	Use this section to see many of the most commonly used functions in the Design workspace. Hover your mouse pointer over each tool to display its name. If you want to control which toolbars appear, on the View menu, click **Toolbars**. Select the toolbar to display and drag it to the desired location on the screen.
2) Align or space toolbar	Toolbars may be docked horizontally or vertically, or they may be free-floating. The alignment or space toolbar allows rapid access to these frequently used tools. On the View menu, point to Toolbars, and then click **Align** or **Space** to display this toolbar.

Section of the screen	Description
3) Report bands	Use this to see each band of the report. Drag the sizing rulers on the left margin of each band to increase or decrease its size. Setting a band's size to zero hides the band. Report objects may be dragged and dropped across bands, multiple objects may be selected in any band where they are placed, and text attribute and alignment properties may be applied across bands.
4) Report Tree section	Use this to display each band of the report and the fields placed there. New variable fields placed in a report can be named and manipulated in the Report Tree screen. On the View menu, point to Toolbars, and click **Report Tree** to display the Report Tree section.
5) Data Tree section	Use this to select a query name in the top section of the screen to display all the fields in the query in the bottom of the screen. Drag and drop fields from the Data Tree directly into the visual report design. On the View menu, point to Toolbars, and click **Data Tree** to display the Data Tree section.

Basic Visual Report Design

Start by organizing the Design workspace. Display the toolbars you plan on using. Then, display the Data Tree section of the Design tab (Section 4 in Figure 36) and drag and drop fields into the bands where you want them to print. Alignment and text attributes may be applied to any number of objects simultaneously, using the Appearance section of the screen in the bottom left. In addition, you can use the Appearance section to control the font, size, and style of labels and data on your report.

Set up your query design to include all the fields you will need for Header, Details, and Footer. For more information, see "Data Workspace" on page 14.

To add a field to a report:

1. Click **Design** to display the Design tab. In this example, the Patient Last Name will be added to the report.
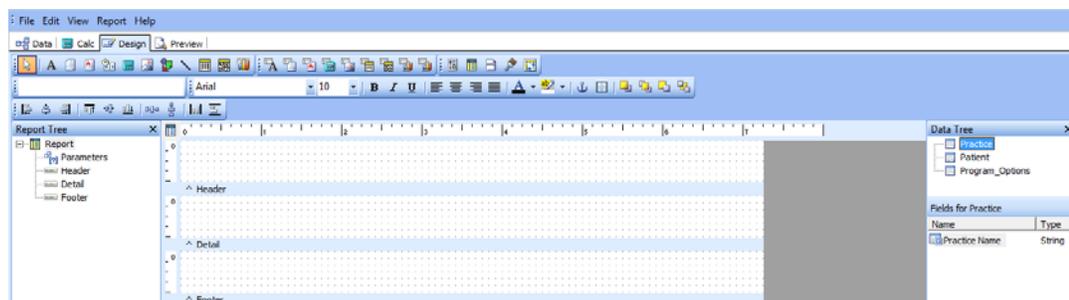
Figure 37. Design tab

2. In the Data Tree, click **Patient**. The list of available fields appears in the Fields for Patient section.
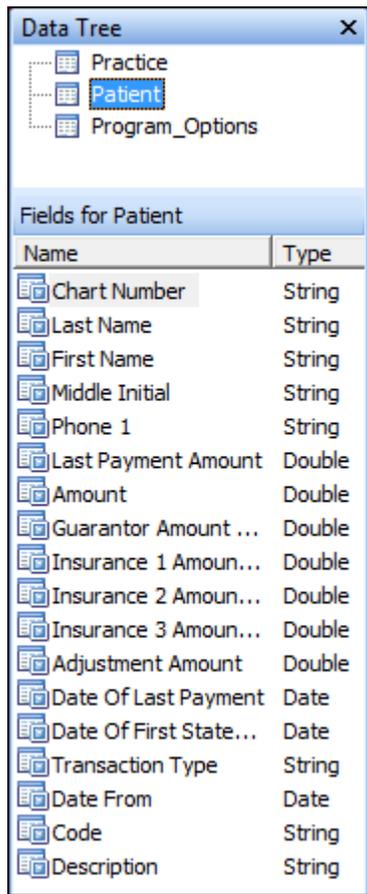
Figure 38. Fields for Patient section of Design tab

3. Click and drag the Last Name field from the Fields for Patient section into the Detail section of the Design tab.
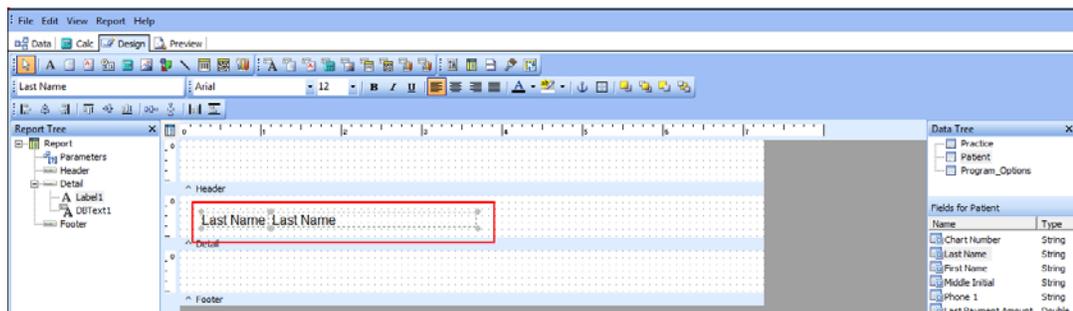
Figure 39. Design tab with Patient Last Name field

Note that when you drag fields, they will include both a label and data field, the label on the left. You can put, for instance, a label in the Header and then place the data field below it in the Details, and create a column in this way. With the label in the Header, it will not repeat for each row included on the report.

4. In the Report tree section of the Design tab, click **Label** in the Detail folder.

5. Click and drag the label on the left from the Details section into the Header section. This will ensure that the column label does not repeat with each patient last name.
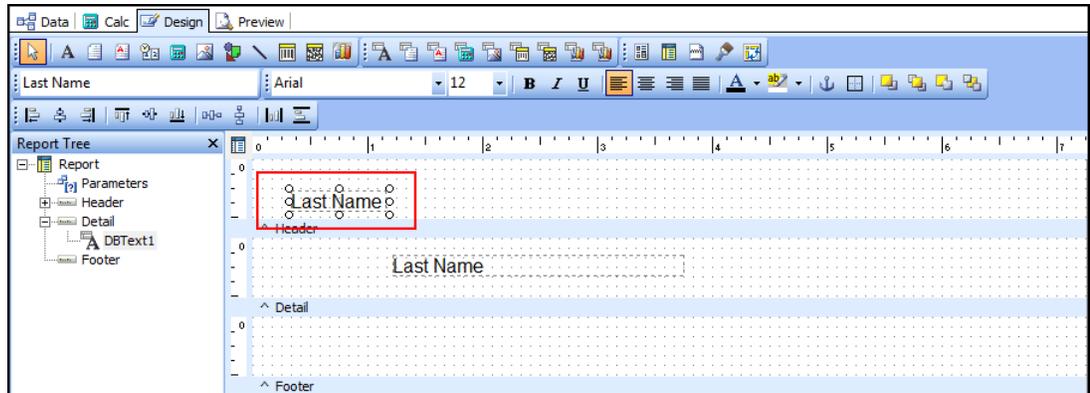
Figure 40. Design tab with field label in Header section

6. Click and drag the Last Name data label so that it lines up under the Last name header label. This will ensure that the data aligns correctly on the column.
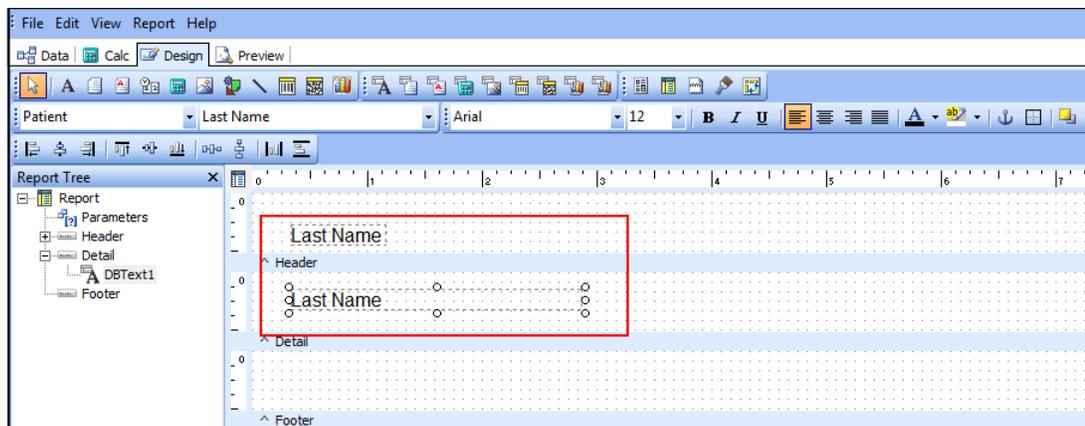
Figure 41. Design tab with labels lined up

7. Repeat these steps for other fields that you want on your report.

To change the appearance of a column label or data in a column:

1. If you want to increasing the size of a column label and change the style to Bold, highlight the column label by clicking it.
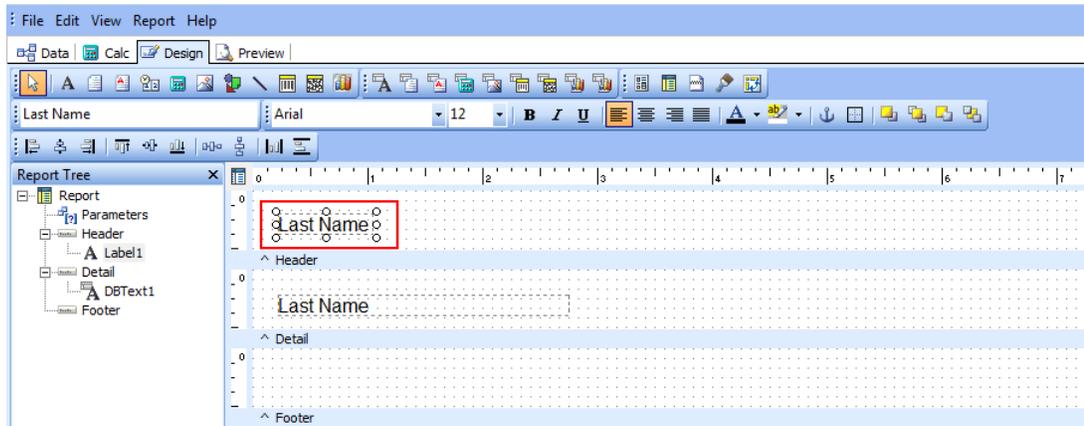
Figure 42. Design tab with Last Name column label selected

2. In the Text section of the Properties for Label... section on the left of the Design tab, click the **+** sign next to Font.
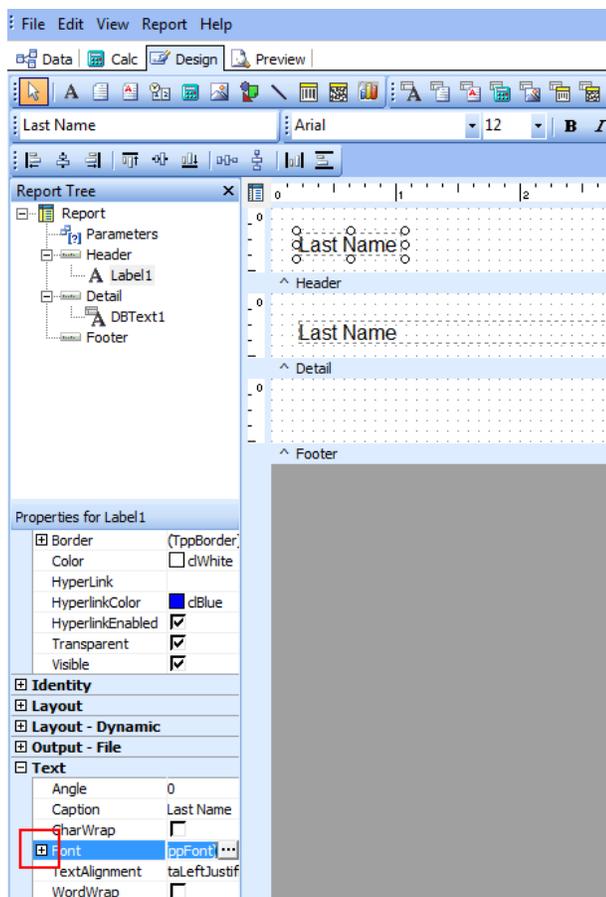
Figure 43. Design tab with Font highlighted

3. The options open.
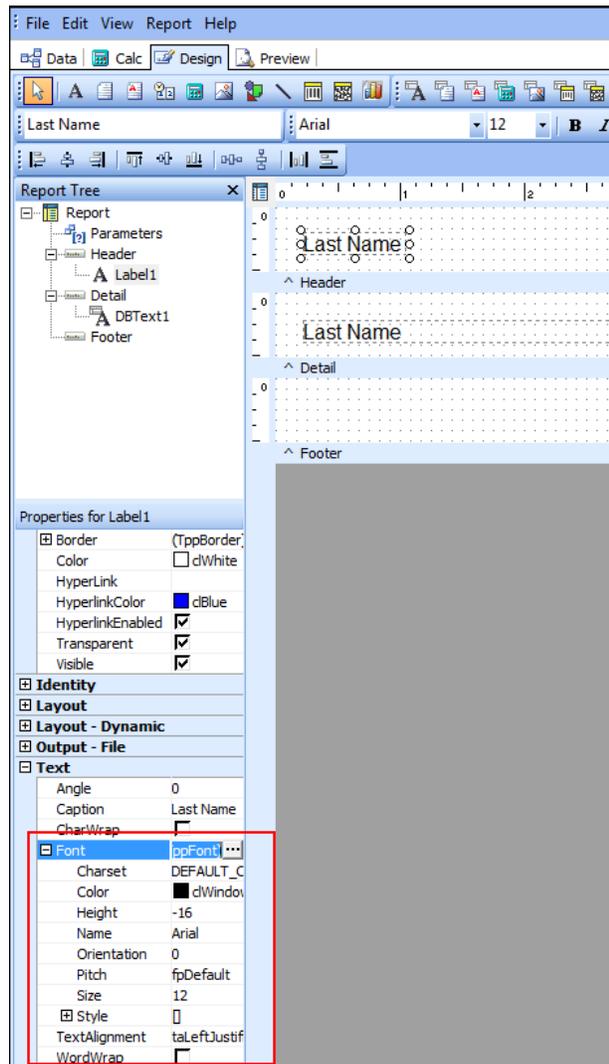
Figure 44. Design tab with Font options displayed

4. Click in the Size field and change the value to 14.

5. Press the ENTER key. The size of the font for the column label changes. Note that some of the label is obscured.
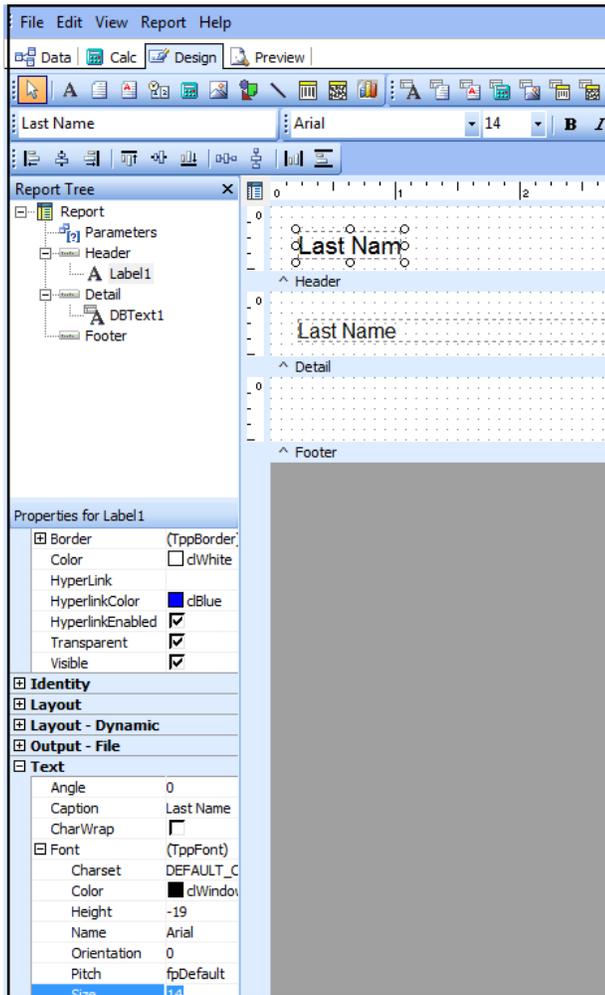
Figure 45. Design tab

6. To display the entire label, click the right-hand size bar and drag the label box so that the entire label appears.
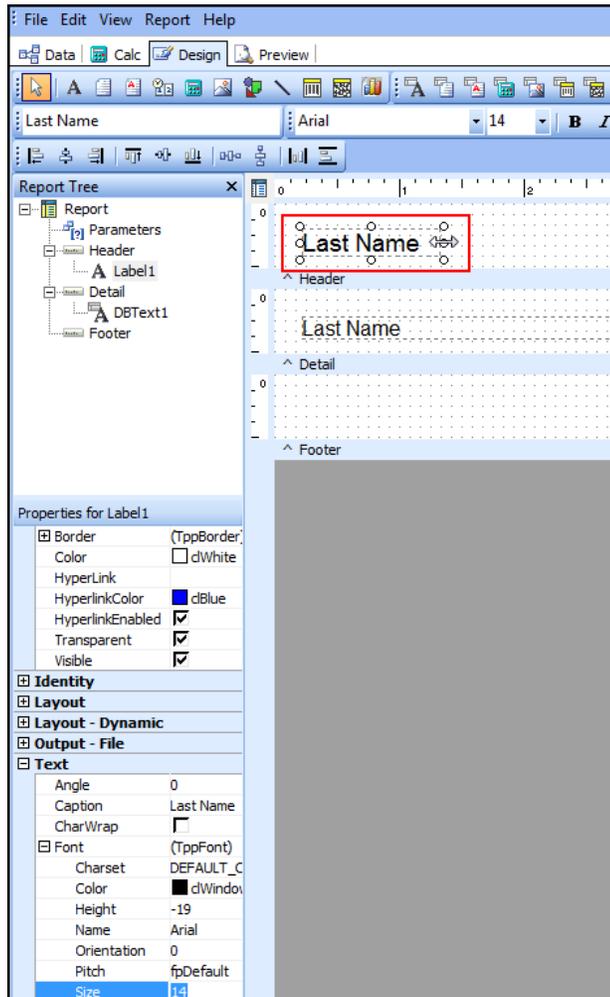
Figure 46. Design tab with Last Name column label highlighted

7. To change the Style to bold, click the **+** sign on Style in the Text section of the Properties for Label section of the screen. This will display style options.
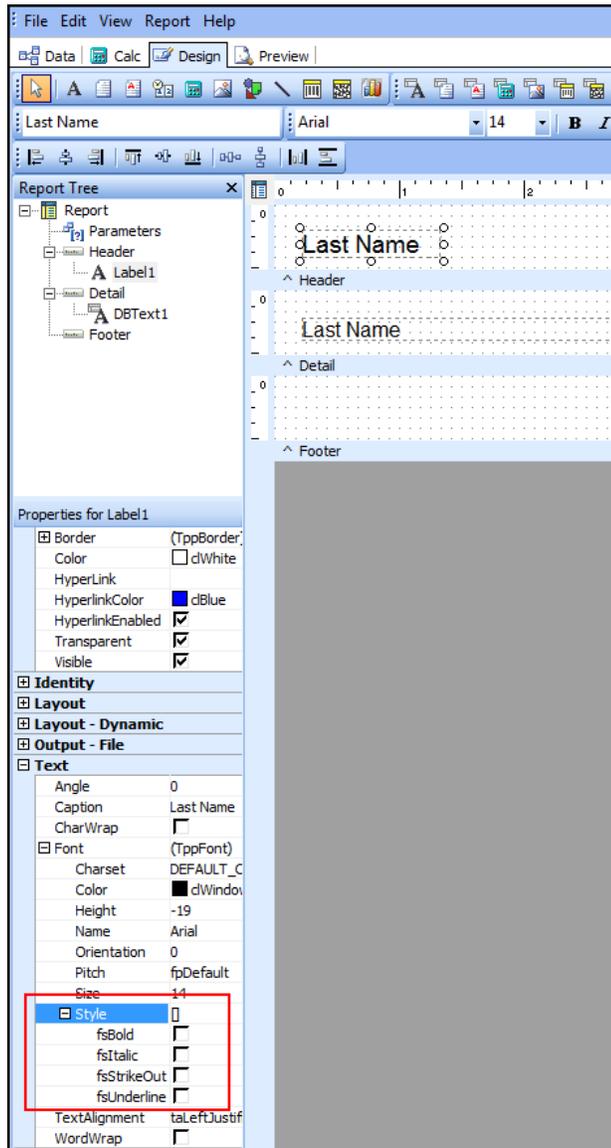
Figure 47. Design tab with Style options highlighted

8. Select the **fsBold** check box. The Last Name column label changes to bold.
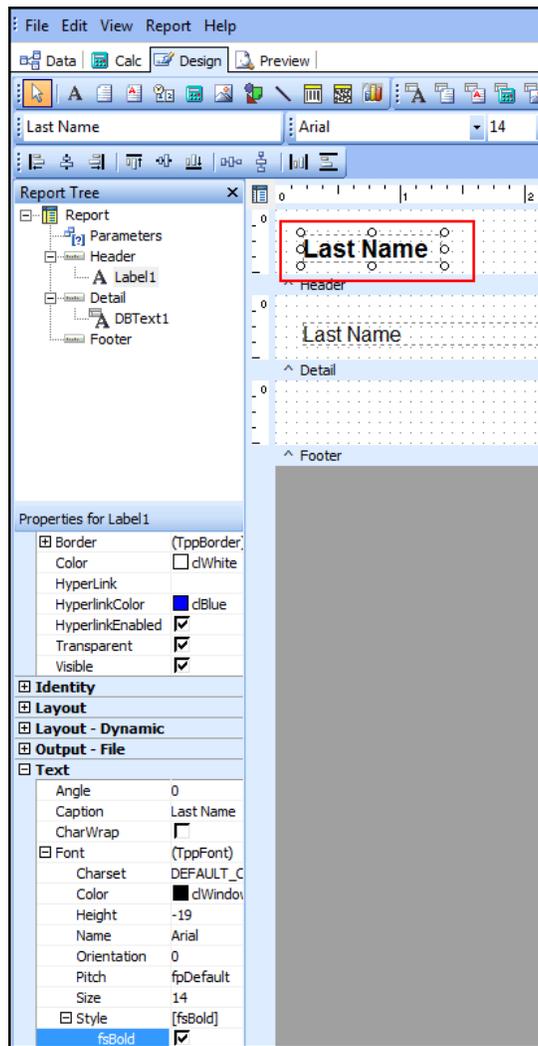
Figure 48. Design tab with Last Name column label in bold

9. Repeat these steps for other fields and labels in the report.

The following section describes menu items available in the Design workspace:

Page Setup

To open the Page Setup screen

- On the File menu, click **Page Setup**.

Use the Page Setup screen to define the destination printer, select the paper size, orientation and source, define columns, and set the page margins.
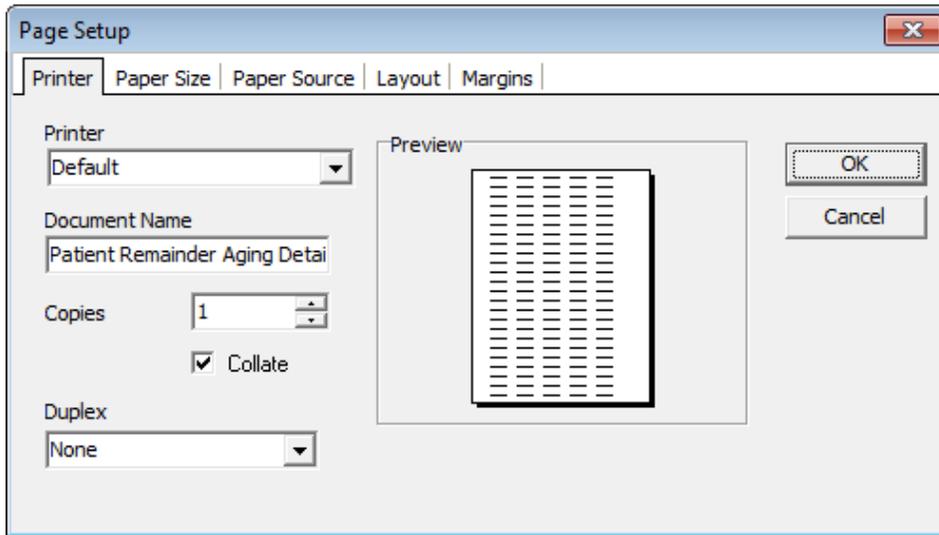
Figure 49. Page Setup screen

Print to File Setup

To open the Print to File Setup screen

- On the File menu, click **Print to File Setup**.

Use this screen to specify the output format (comma delimited, tab delimited, or fixed length) and then choose the fields from each band to export. Select the band and field from the Available Controls section, and move the field to the Selected Controls section.

Naming each field using the Report Tree screen prior to setting up the export details makes this easier because each field will be named descriptively.
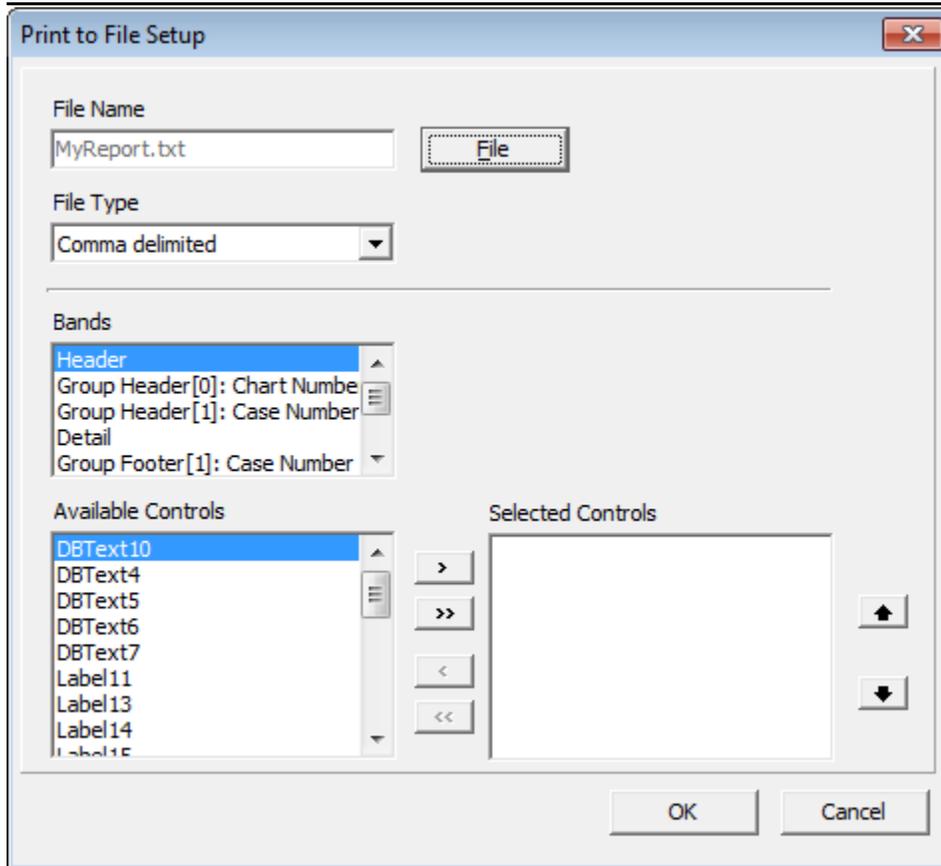
Figure 50. Print to File Setup

View Menu options

You can show or hide several toolbars and menus, depending on your needs and selections.
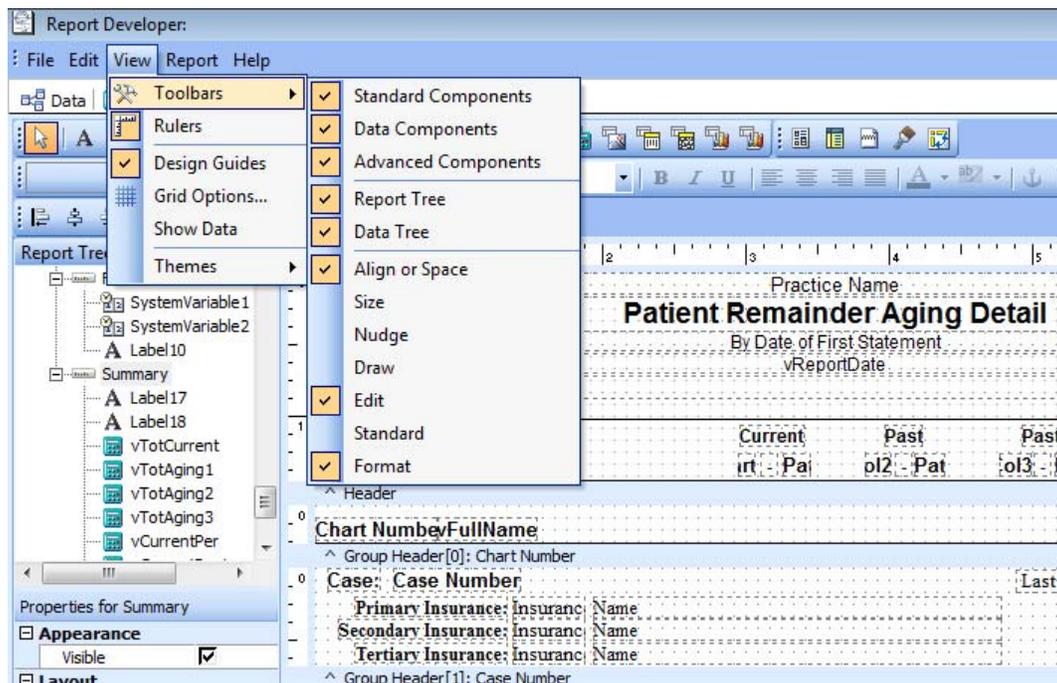
Figure 51. Report Designer with menu items displayed

Toolbar or Option	Description
Standard Components	Use this to access these tools: Select, Label (static text), Memo (static paragraph text), Rich Text (static formattable text), System Variable, Variable (definable contents using Calc tab), Image, Shape, Line, Chart (static chart), and Bar Code (static bar code).
Data Components	Use this to access these tools: DB Text (database field), DB Memo (database memo), DB Rich Text (formattable database text), DB Calc (calculate fields from a database), DB Image, DB Bar Code (print database field as bar code), and DB Chart (create chart from query).
Advanced Components	Use this toolbar to access these tools: Region (container for other components), Sub Report (report within a report), and Cross Tab (summarized data in a grid format).
Report Tree	Use this to display objects in the report (bands, fields) in an outline format. See at a glance all the components of the report and easily rename components.
Data Tree	Use this to display the report's data queries, also called Data Pipelines. Select a query to see all fields associated with the query. Drag and drop fields from the Data Tree directly into bands in the visual designer.

Toolbar or Option	Description
Standard	Use this to access these tools: New Report, Open Report, Save Report, Page Setup, Print, Print Preview, Cut, Copy, and Paste.
Format	Use the Format toolbar to access these controls: Font, Size, Text Effects, Justification, Text Color, Highlight Color, and Positioning.
Edit	Use this to edit the name or type of each report component.
Draw	Use the draw toolbar to control Fill Color, Line Color, Line Thickness, and Line Style.
Align or Space	Use this to control the alignment and spacing of objects on a report.
Size	Use the size toolbar to shrink or grow the width or height of a control to the largest or smallest object.
Nudge	Use the Nudge option to move the selected objects slightly left, right, up, or down.
Rulers	Use this to turn on or off the sizing rulers in the visual designer.
Grid Options	Use Grid Options to allow the alignment grid to be turned on or off in the visual designer. The alignment grid makes rough alignment of report objects easier and more accurate.
Show Data	Use this to display the contents of data tables while the report is being designed.

Report Menu
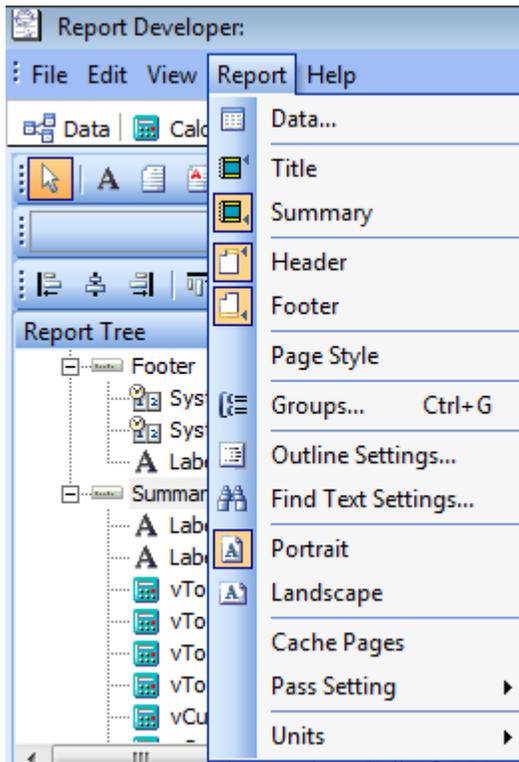
Figure 52. Report Developer screen - Report menu

The Report menu has the following options:

Menu Option	Description
Data	Use this to select a data pipeline. A data pipeline is a data source for the report, that is, a query created using the Query Wizard or Query Designer.
Title, Summary, Header, Footer	Use this to display report bands for these regions.
Page Style	Use this to control a report band that allows placement of a graphic or other formatting object that will print in its entirety as a background on a page. Uses for the Page Style band include formatting grids or lines, scanned images, and drawn regions of a form.

Menu Option	Description
Groups	Use Groups to group information on a report, as in a master/detail arrangement. Multiple groups can be created for a report, each of which is sizable and has its own group header and footer. Open the Groups screen and then select the grouping trigger. Data in a query must match its intended grouping. Each time the grouping trigger changes, a new group is created. If query data is not sorted properly to support grouping, unexpected group breaks will occur.
Cache Pages	Use this to store pages in memory to allow rapid movement between preview pages.
Pass Setting	Use Pass Setting to control the number of times data for a report is traversed, that is, scanned and analyzed. Two passes are required if a total variable must be printed prior to the detail that is totaled or accumulated.
Units	Use Units to control the unit of measurement used on the Design workspace.

Preview Workspace

The Preview Workspace shows you what the report will look like as it is currently designed. Switching between the Design and Preview workspace is an excellent technique to help visualize a report as it is created.

Switching to the Preview workspace will require differing amounts of time depending upon whether the report has been saved since the previous preview, the complexity of the report, and the size of the data tables for which the report is being designed.

Performance of the Preview Workspace can be improved by using CGM MEDISOFT tutorial sample data or another similarly small data set. Large data sets will significantly delay display of the preview, particularly with complicated reports.

Using the Developer Menu in Reports Explorer

Developer properties are assigned to a report to:

* Identify the author of the report
* Provide contact information for the author
* Permit or prevent editing of the report

- Require input of an unlock code when installing a report to protect reports from unauthorized distribution
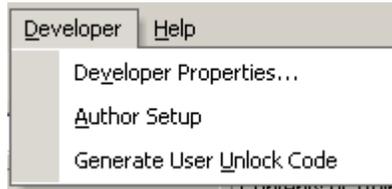
Figure 53. The Developer menu

Developer Properties

To open the Developer Properties screen:

- On the Developer menu in the Report Explorer, click **Developer Properties**.
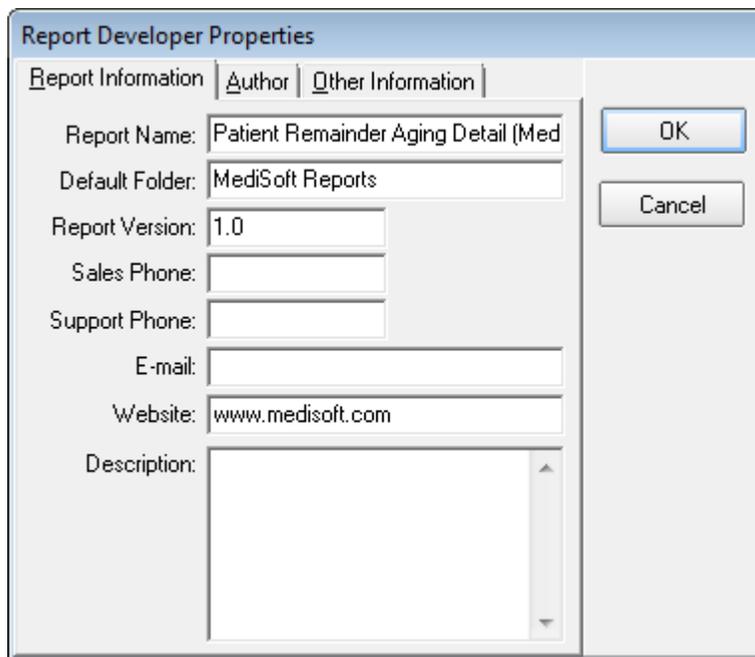
Figure 54. Report Developer Properties screen - Report Information tab

Developer Properties are assigned to *each report* and are stored in the report definition file. They are transported with a report file when it is exported from the developer and imported into another computer.

Report Information tab

Option	Description
Report Name	Enter the name of the report. This name is displayed in the unlock code screen and in the About Box for the report.
Default Folder	Use this to see the name of the Report Explorer folder where the report will be placed when it is imported. If the folder name does not exist, importing the report will create the folder.
Report Version	Use this to enter your internal control number for the report release.
Sales Phone, Support Phone, E-Mail, Website	Use this to dispaly contact information in the status bar of the Report Explorer when the report is highlighted.
Description	Use this to enter a description of the report (up to 250 characters).

Author tab

Use the options on this tab to control what the user can do with the report.

Figure 55. Report Developer Properties screen - Author tab

NOTE: Author information must be entered before setting the Author properties of a report. The Author Setup screen can be accessed from the Developer menu in the Report Explorer or by clicking the Author Setup button on the Author tab in the Developer Properties screen. The Author

setup screen is described in "Author Setup " on page 54.

Option	Description
Report ID	Enter any alphanumeric code up to 15 characters. This code is defined by you to identify each report.
User Can Edit	Use this to permit or prohibit editing of the report by another user.
User Can Export	Use this to permit or prohibit exporting of the report from CGM MEDISOFT Reports or CGM MEDISOFT Reports Developer. This setting further controls the ability of users to distribute your reports.
Demonstration	Use this to limit printing of a report to one page. Using this setting will allow a limited-use demonstration copy of the report to be created.
Freeware	Use this to indicate if you want users to enter an unlock code, protecting the report from being edited.
Generate Report Key	Use this to generate a confidential key code that is used later in the process of creating an unlock code for an end-user. Warning: Regenerating a Report Key will invalidate all unlock codes previously issued for a report. When a report key has been generated, a picture of a key is displayed to the right of the Generate Report Key button.

Other Information tab

The Other Information tab displays the date created, the date modified, and the report definition file version.
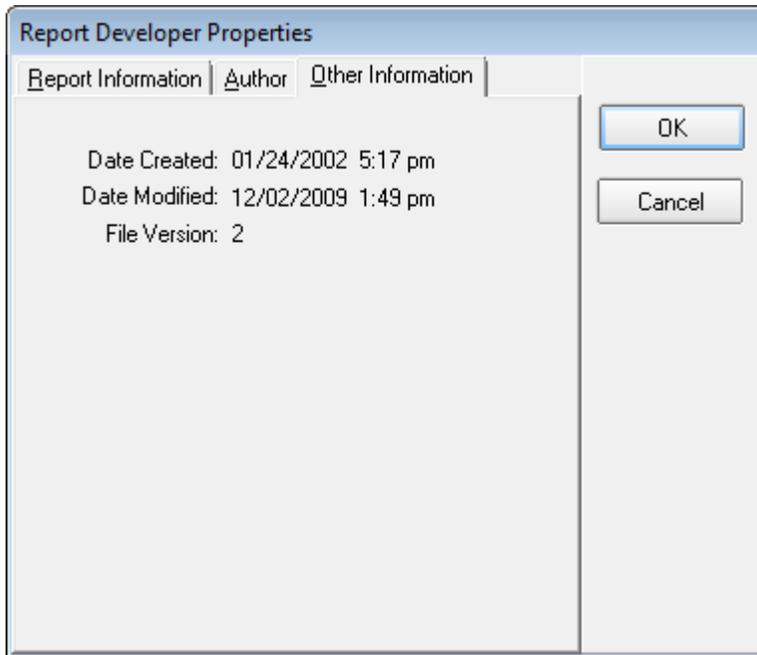
Figure 56. Other Information tab

Author Setup

Use the Author Setup screen to identify a report author and store the author password:
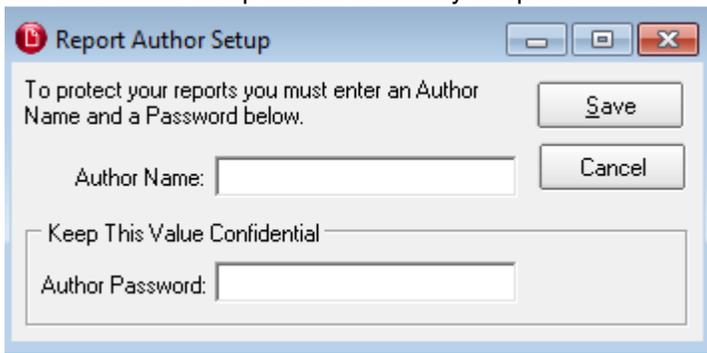
Figure 57. Report Author Setup screen

Author setup must be done on every computer in an office that will be creating reports. Enter the same Author Name and Author Password on every computer.

Field	Description
Author Name	Use this to enter the name of the author of the report. eMDs recommends that the Author Name be set to your company/ practice name.

Field	Description
Author Password	Use this to enter any combination of characters. Safeguard this password to prevent other report creators from having access to your report definitions.

Generate User Unlock Code

Use this screen to issue a unique unlock code to each purchaser or user of a report.

Figure 58. Generate User Unlock Code for Report screen

Field	Description
User Name	Enter the user's name as they want it to appear in the Report Explorer. This field is not case sensitive. Characters other than letters and numerals are disregarded.
Generate Unlock Code	Click this button to issue a 16-character unlock code.
Copy Name and Code to Clipboard	Use this to copy information in a format that is suitable for pasting into an email message to notify a user of a code for a purchased report or for tracking issued codes.

Deploying a Report

Once you have created a report, you will need to deploy it so it can be produced and printed. All reports created with CGM MEDISOFT Reports Professional reside in a single report database file. The database file will be located on the database server if you are using the developer in a client/ server environment, or on the local computer if used in a single-user setting.

No matter what type of database environment is in use, reports designed with the application must be *exported* to a data file and *imported* into the CGM MEDISOFT Reports Print Engine on the destination computer. You have two options available when deploying a report: Manually import the report, or create an installation CD/DVD for distribution of the report.

Exporting a Report

1. When a report is completed, save the report and close the Developer screen.

2. In the Reports Explorer, select the report by clicking to highlight the report title.

3. On the File menu, click **Export Report**. The Export Report screen will display to complete the export.
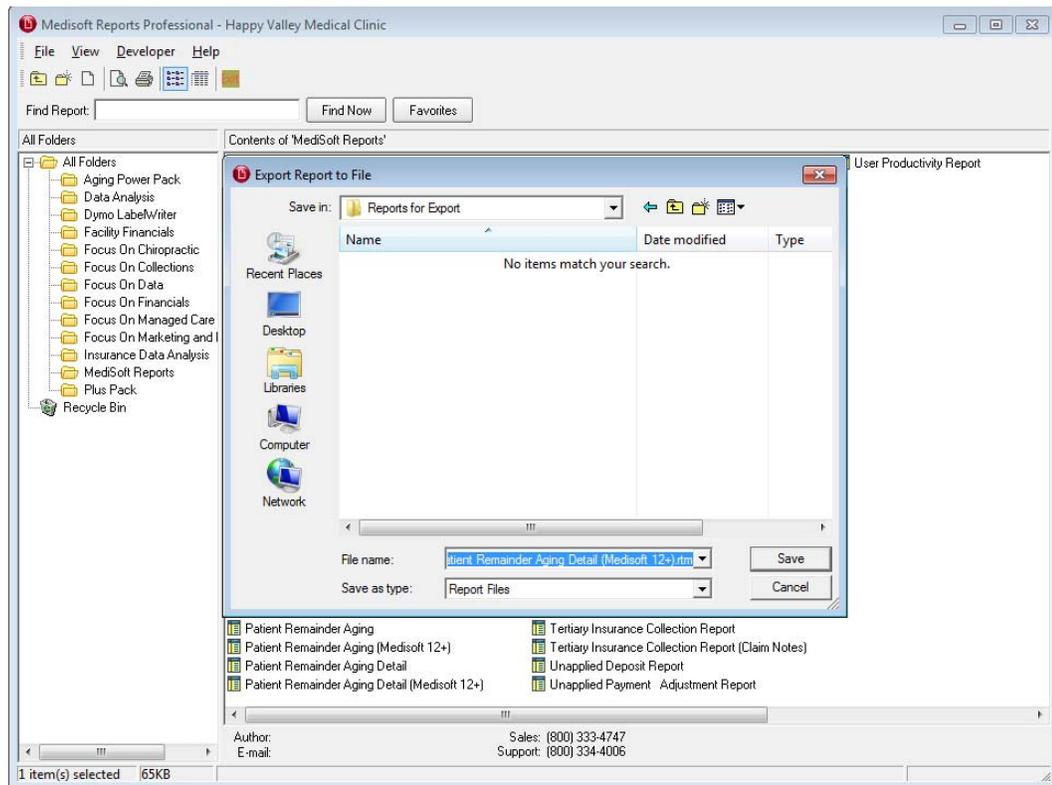
Figure 59. Export Report screen

The name of the report will default to the name given the report in the Report Explorer. All reports will have a file name extension of .rtm.

4. Navigate to a location of your choice for exporting the file.

Importing a report

To import the report on the destination computer:

1. Open the Report Explorer.

2. On the File menu, click **Import Report**. The report title will appear in the Report Explorer with the title of the report file as its name.

Creating an Installation DVD

Software is included with CGM MEDISOFT Reports Professional to create a self-running installation DVD for any report or group of reports. If you want, you can create a DVD for those who will install the report on their computers.

The first step to create an installation DVD is to export the report file from Reports Professional.

Open Windows Explorer and browse to the C:\Program Files\CGM MEDISOFT\Bin\MakeInstall folder. In this folder are all the files and folders necessary to create an installation DVD. eMDs recommends that you copy all included files and folders in the MakeInstall folder to a separate location for each distribution DVD you create.
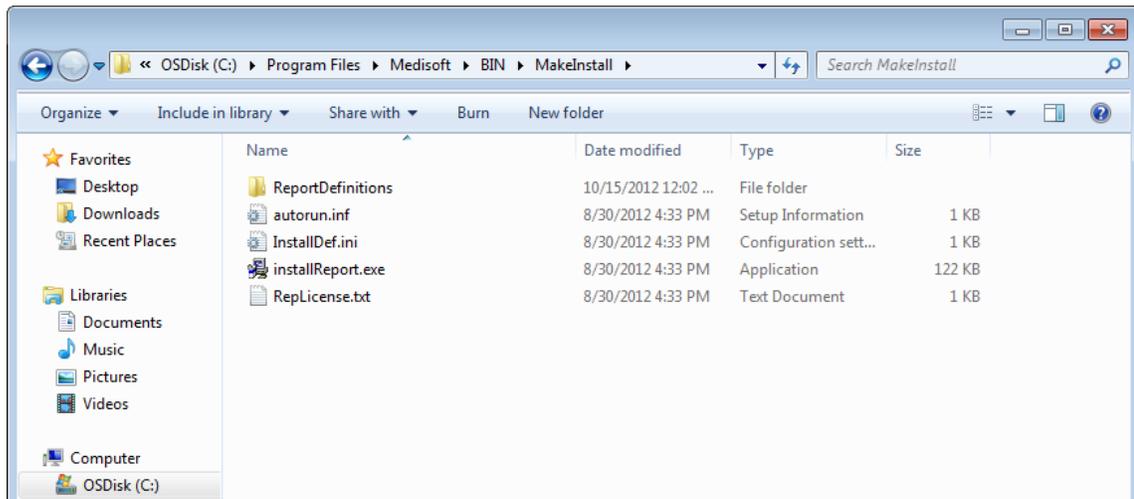
Figure 60. Make Install folder

File or Folder	Description
Report Definition Folder	Use this folder to place all the .rtm report files to be included on the DVD in this folder.
Autorun.inf	This is the file used by Windows to determine which program file to execute when a DVD is inserted in the computer's DVD-ROM drive. This file must not be changed.
InstallDef.ini	This file contains information to personalize the installation for your company and report. Edit this file with Notepad to personalize the installation. See Figure 61 on page 58.
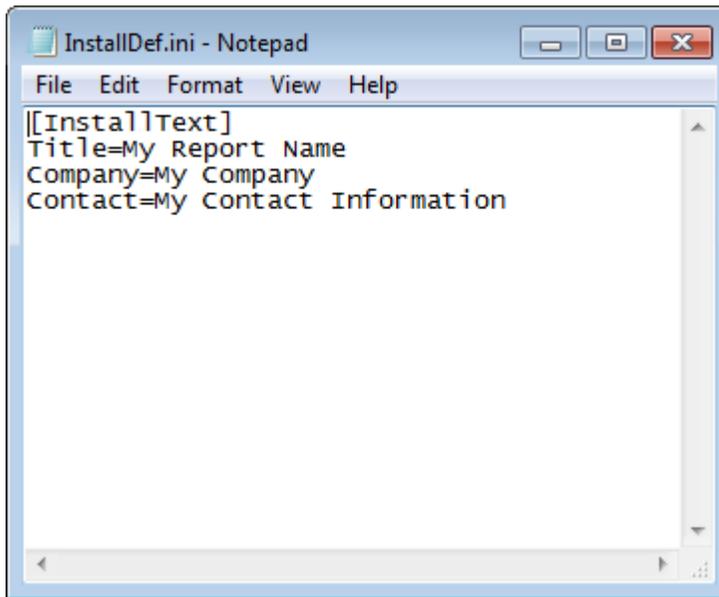
Figure 61. InstallDef.ini in Notepad

Field	Description
Title	Use this to enter the title of the report or group of reports to be installed.
Company	Use this field to enter the name of your company/practice.
Contact	Use this to enter your telephone number, web site address, or other contact information. Limit the length of the information you enter on this line to no more than 100 characters. You can check the appearance of the contact information on the first screen of the installation program by running the installReport.exe program after editing the file.
InstallReport.exe	This is the customizable installation program. All customizable parameters are contained in the *InstallDef.ini* and *RepLicense.txt* files. Edit this file in Notepad to include a click-to-accept license agreement, if any, in the installation program.
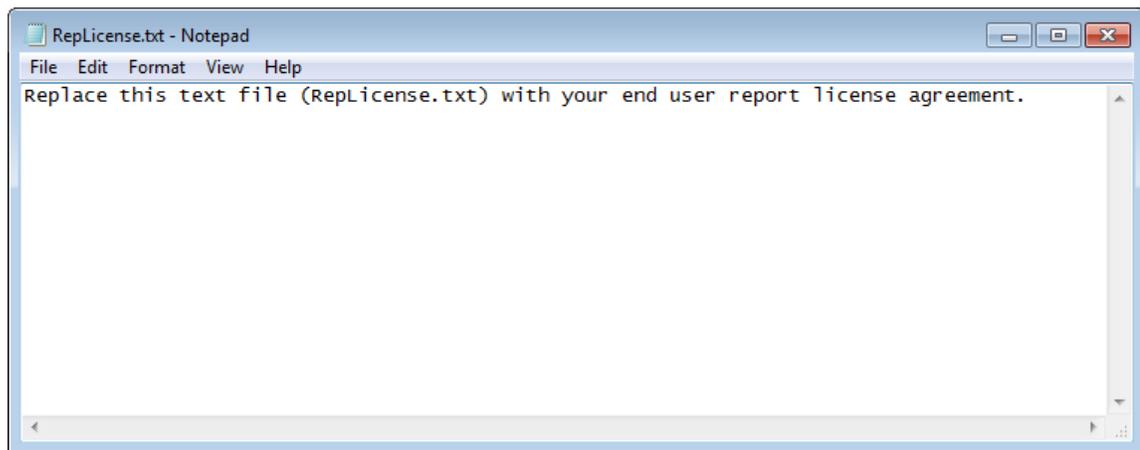
Figure 62. RepLicense.txt in Notepad

Create a distribution DVD by copying the *entire contents* of the MakeInstall folder to the root directory of a DVD. Do not copy the MakeInstall folder itself; copy only the contents.

Chapter 3 - Automatic Report Generation and Delivery

Use CGM MEDISOFT Reports Server to automatically generate and deliver reports for CGM MEDISOFT.

CGM MEDISOFT Reports Server Overview

The CGM MEDISOFT Report Server is used for two primary tasks:

- Producing reports on a schedule
- Delivering reports to the people who need the information

The report server works with custom reports designed with CGM MEDISOFT Reports Professional and the reports found in CGM MEDISOFT Report packs.

Scheduling Options

CGM MEDISOFT Reports Server offers many options for scheduling reports:

- Reports can be scheduled daily, weekly, or monthly
- Reports can be scheduled for one-time production or repeated for any desired time period
- Reports can be produced for any CGM MEDISOFT data set available to the report server
- All available data filters may be set in the report schedule
- Date filters offer settings for Today, This Week, This Month, This Year, Yesterday, Last Week, and Last Month. The appropriate dates are automatically used for the date filter when the report is produced

Delivery Options

CGM MEDISOFT Reports Server offers several methods of report delivery:

- To client software that periodically checks to see if a user has reports waiting. When a report is found, the client software notifies the user of this
- To client software for viewing reports, report printing, and filing for future reference. This software is called Report Server Client and is provided with the CGM MEDISOFT Report Server
- To print automatically on any printer on the network
- To Adobe Acrobat Reader (.pdf) format and then emailed to a recipient
- To any number of recipients on a local area network combined with any number of email recipients and printed

Setup

Users

CGM MEDISOFT Reports Server and Client uses a combination of CGM MEDISOFT standard security and permissions to determine which users may access reports.

If you apply standard security to your practice, then you can limit access to report generation and viewing on a report-by-report basis by using the CGM MEDISOFT Reports Permissions screen and determining what level (1-5) has access to the various reports.

The CGM MEDISOFT Permissions feature provides five levels of access to the program. The Security Supervisor/Administrator, who has unlimited access and full control of security, can assign or remove rights for any level of security, with one exception. Level 1 access cannot be removed from any of the three options listed in the Security screen settings for the Supervisor. Lower level access can be added, but the Supervisor must retain rights to these options.

Before assigning permission levels to various CGM MEDISOFT Reports, you will need to create at least one user (administrator) in the practice.

Creating Users in a Practice

1. On the File menu in CGM MEDISOFT, click **Security Setup**. The **Security Setup** screen appears.
2. Click the **New** button. The User Entry screen appears.

Figure 63. User Entry screen

3. On the Login Name field enter the user's code for logging into the program.
4. On the Full Name field enter the user's full name.
5. On the Password field enter the user's password. This must be a minimum of 8 characters and is case-sensitive.
6. On the Reconfirm field enter the same data entered on the Password field.
7. From the Access Level list, select the user's security level. If you are entering a supervisor/administrator, make sure you select **1**.

Option: from the Expire Date list, select a date for the user's account to expire; this is very useful for temporary workers.

Figure 64. User Entry screen - Main tab

8. Click the **Question** tab.
9. From the Select a Question list, select one of the available prompts or enter a unique prompt.
10. On the Answer field, enter the answer to the security question prompt.
11. On the Reconfirm field, enter the same data from the Answer field.

Figure 65. User Entry screen - Question tab

12. Click the **Save** button.

Assigning Report Permission Levels

On the File menu in CGM MEDISOFT, click Report Permissions to open the CGM MEDISOFT Reports Permission screen, which is used to set permissions for most reports available in CGM MEDISOFT and in the CGM MEDISOFT Reports engine. Permissions for most statements and other reports using the .MRE extension, however, are set in the CGM MEDISOFT Security Permissions screen.

NOTE: These options do not appear on the File menu until security has been applied to a practice with users created in the Security Setup screen.

When users access the Reports Server or Reports Client, their access level determines what reports can be generated or viewed.

1. Log in to CGM MEDISOFT as a Level 1 user.

2. On the File menu, click **Report Permissions**. The CGM MEDISOFT Reports Permissions screen appears.
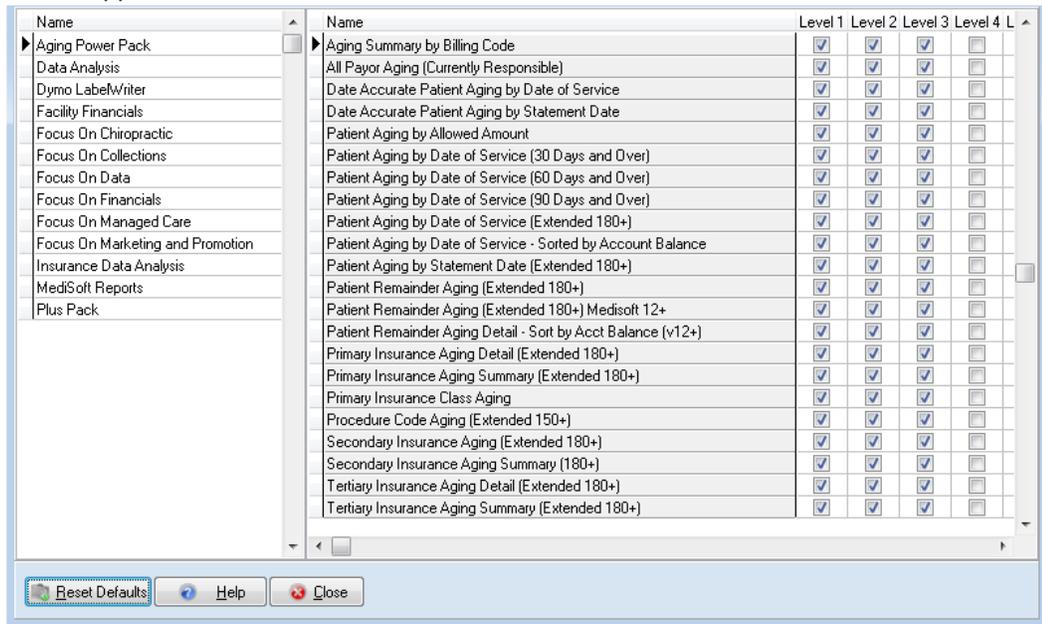
Figure 66. CGM MEDISOFT Reports Permissions screen

3. As needed, select a report grouping from the left panel of the screen to apply or modify a permission setting. The reports associated with the report grouping appear right panel of the screen.
4. On the right panel select a report to change or apply a permission setting. As needed, select the **Level 1**, **Level 2**, **Level 3**, **Level 4**, and **Level 5** check boxes. You can select multiple check boxes (levels).
5. When finished making changes to this report, select others to modify if needed.
6. Click the **Close** button when finished. The Information screen appears.
7. Click the **OK** button. The modified permissions take effect after the user logs off the system and logs on again.

E-mail Setup

Ues the report server to deliver reports via email. Emailed reports will be sent in Adobe Acrobat .pdf format. The Adobe Acrobat reader is available for installation on the CGM MEDISOFT installation DVD. The report server uses settings that you enter in the E-mail Options screen.

These network and email facilities are required to use the email feature in the report server:

- Access to an SMTP outbound email server (other types of servers are not supported)
- Permanent (always connected) Internet connection for the computer running CGM MEDISOFT Report Server

To open the E-mail Options screen:

- On the File menu in Reports Server, click **E-mail Options**. The E-mail Options screen appears.

Figure 67. E-mail Options screen

Email Configuration

In the Email Options screen, select and enter data to configure email delivery of reports. Most of the settings in this screen rely on your email/network settings and configuration.

Field	Description
SMTP Server	Enter the full name of the SMTP email server that will be used for outbound email.
From Email	Enter the email address of the person that generates/supervises reports. This information will appear in the From field of the email. This email address is used as the default name for emailed reports but may be overridden in a report schedule.
Subject	Use this to select Report Title, Practice Name, or Schedule Name from the Subject list, or enter the text to be used for the Subject line of email messages. This subject selected here is used as the default subject for emailed reports but may be overridden in a report schedule.

Field	Description
Reply To Email	Use this to enter a Reply To email address. In most cases, enter the same email address that you entered in the From Email field. If you want report recipients to reply or send comments to a different address than the address used in the From Email field, enter the new address in this field.
Login Name	Enter your email login name. Contact your email provider to find out your login name or check your email setup information in your main email application.
Password	Enter your email password. Contact your email to find out your password or check your email setup information in your main email application.
Confirm Password	Enter the same data entered in the Password field.
Port Number	Use this to enter a port number, if necessary. Contact your email provider to find out the correct port number or check your email setup information in your main email application.
SSL Option	Use this to select the type of SSL from the list, if necessary. Contact your email provider to find out if your system uses SSL and what type is used (AUTO, SSL, or TLS) or check your email setup information in your main email application to see if SSL is used.

Troubleshooting

If you have difficulty sending and receiving email, contact your email provider to verify your network information, such as SMTP Server, login name, password, port number, and SSL use. In many cases, your email provider has documentation on changing email settings such as port numbers, SSL, password, and so on.

Also, make sure that your email server is an SMTP/POP3 server. The email server must support SMTP/POP3 email. That means that some popular, free email services will not work.

If you receive a connection reset error message or other generic connection error messages and you use a firewall, you may also need to change firewall settings to allow an exception for the Report Server.

WARNING: Since changing firewall settings can pose a security risk, consider contacting your network administrator before making any changes.

To add an exception to the Windows firewall:

1. Launch the **Control Panel** and double-click **Windows Firewall**.
2. Click the **Exceptions** tab.
3. Click **Add Program**.
4. Select **Report Servers**.
5. Click the **OK** button.
6. Click the **OK** button.

Importing Reports

Reports must be imported into the CGM MEDISOFT Report Server database to be available for scheduling. Reports currently installed for CGM MEDISOFT on a single computer or a network can be used directly with the report server.

Report importation happens both **automatically** and **manually**. The report server automatically imports reports from its AutoImport folder when it starts. Manual importation is done with a menu selection in the report server.

Automatic Importing

Follow these steps to **automatically** import a report:

1. Close the report server.
2. Place the report definition file or files (filename.rtm) in the CGM MEDISOFT AutoImport folder. This folder by default is found at C:\Program Files\CGM MEDISOFT\AutoImport.
3. Open the report server.

Manual Importing

Follow these steps to **manually** import a report:

1. Place the report definition file or files (filename.rtm) in the CGM MEDISOFT AutoImport folder. This folder by default is found at C:\Program Files\CGM MEDISOFT\AutoImport.
2. On the File menu, click **Import Reports** from the report server menu.

Note: Reports contained in CGM MEDISOFT report packages must be imported in the same manner as a custom report created with CGM MEDISOFT Reports Developer. The installation program for each report pack will place the report definition files in the AutoImport folder for automatic or manual importation.

Scheduling a Report

Schedules Tab
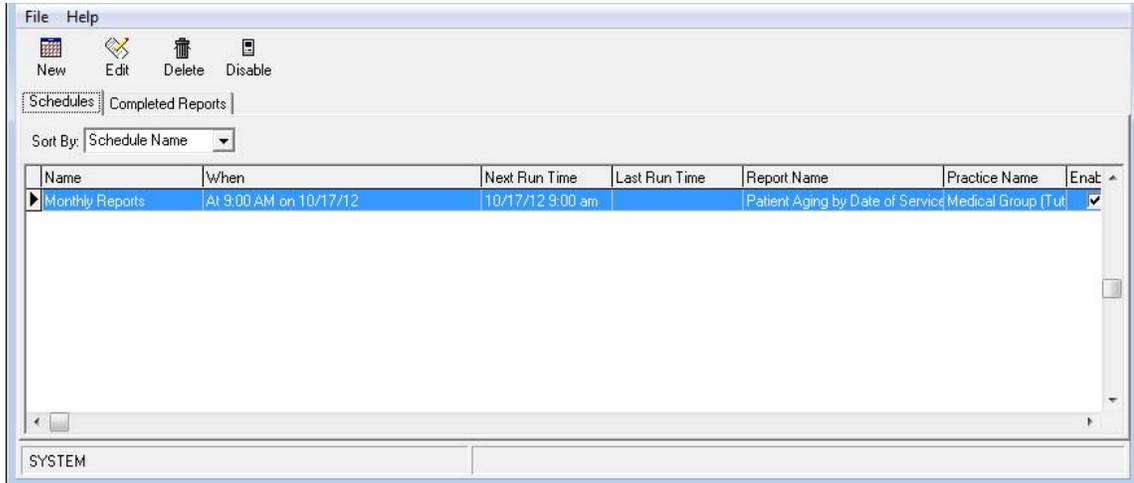
Figure 68. Schedules tab

The Schedules tab appears on the main CGM MEDISOFT Reports Report Server screen. This lists all currently scheduled reports. Use the controls on the tab to review information about scheduled reports, to change report schedules, to delete a scheduled report, or to add a new schedule entry. Information about each scheduled item may be viewed directly by enlarging the screen or scrolling to the right to view more columns of report information.

Option	Description
Sort By	Use this to select the field by which you want to sort the list of scheduled reports from this drop-down list.
New	Use this to enter a new report schedule.
Edit	Use this to edit a report schedule.
Delete	Use this to delete a report schedule. The Confirm screen will appear and you will be asked to confirm that you want to delete the scheduled report with this screen.
Disable/Enable	Use this to stop the automatic generation of the report. Click the Yes button on the Warning screen to disable the report. Click the Enable button to resume regular generation of the report. **NOTE**: this option is only available in the CGM MEDISOFT Reports Server.

Report Schedule Entry

To open this screen, click the **New** icon on the toolbar of CGM MEDISOFT Reports Server.

Figure 69. Report Schedule Entry screen

This screen is used to define a scheduled report. Complete the information required on each tab to create or edit a schedule entry. Here is a brief description of each tab:

Field	Description
Report	Use this to name the schedule entry and select the report and the data set to use for the report.
Schedule	Use this to define when the report will be produced.
Recipient List	Use this to select a list of recipients that will view the report using the Report Server Client.
Delivery	Use this to print reports on a local or network printer and/or export to a file after completion. Define these options on this tab.
Email	Use this to enter a list of recipients to receive the report by email.
Note	Use this to enter additional information to describe the report.

Report tab

Figure 70. Report Schedule Entry screen - Report tab

Field	Description
Schedule Name	Enter the name of this scheduled report. It is helpful to describe the report that will be printed and the practice name used for the schedule when CGM MEDISOFT is used for billing with multiple data sets.
Report Name	Click the Select Report button to choose the report for this schedule. All currently installed CGM MEDISOFT reports will be shown on the list. The report must be available in CGM MEDISOFT to be scheduled.
Practice Name	Select the CGM MEDISOFT data set for which the report will be produced. All CGM MEDISOFT data sets available to the computer running the report server software will be displayed on this list.
Schedule Enabled	Use this to inactivate a report schedule. A disabled report schedule can remain on the schedule without harm. You can also enable or disable a report from the Schedule tab using the Enabled check box. See "Schedule tab" on page 72.

Field	Description
Choose Report Filters	Click the Choose Report Filters button to create and save the data selection questions for the report. All data selection questions appear exactly as they would with any CGM MEDISOFT report, with the exception of date selection questions. Rather than entering a date for the selection question, a time period is selected. Choose from the following options: • All (all dates available in CGM MEDISOFT) • Today • This Week (all dates occurring this week between the prior Sunday and the current date and time) • This Month • This Year • Yesterday • Last Week (all dates last week between Sunday and Saturday) • Last Month • Last Year These time period selections allow a variable date filter that is calculated at the time a report is printed and automatically applied to the report to show the desired time period. These date filters are relative, which means that the time period is different depending upon when the report is printed. Filters entered in a report schedule are stored permanently with the schedule, eliminating the need to enter the filters every time the report is printed.

Schedule tab

Use the Schedule tab in the Report Schedule Entry screen to define when the scheduled report will be produced.
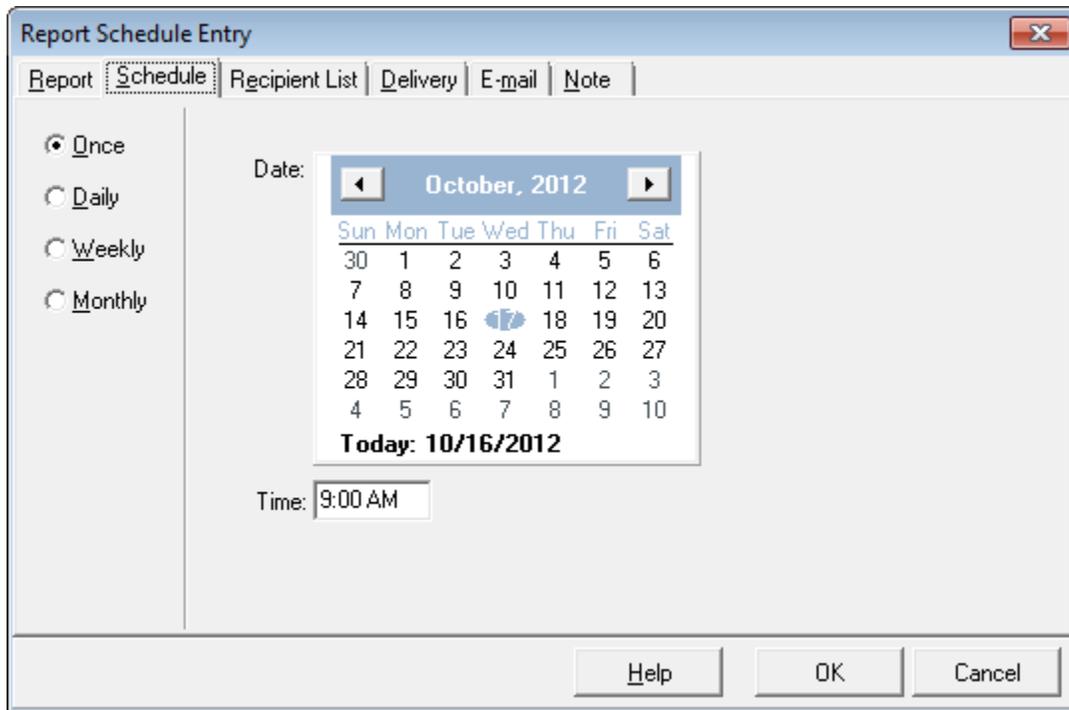
Figure 71. Report Schedule Entry screen - Schedule tab

Recipient List tab
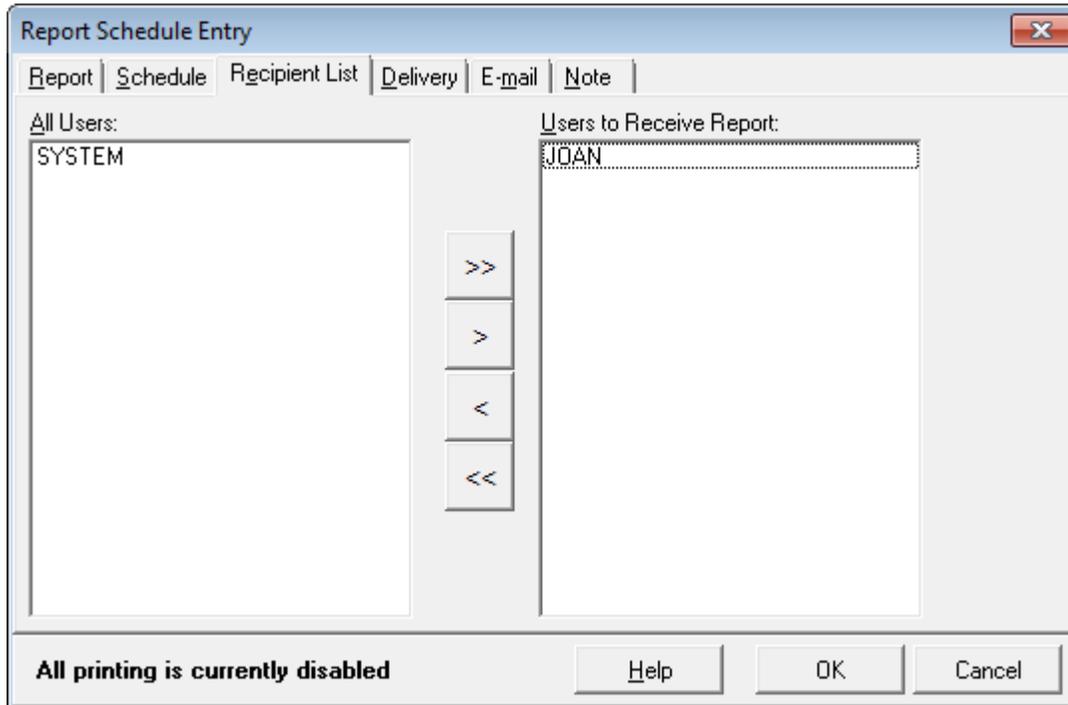
Figure 72. Report Schedule Entry screen - Recipient List tab

Users currently set up to receive reports in CGM MEDISOFT Report Server are listed on the left of this screen under All Users. Users currently assigned to the scheduled report are listed in the Users to Receive Report column. Select a user in either column and then click one of the buttons in the area between the columns to move users to the other side.

Users must be set up in the report server to be able to receive a report through the Report Server Client software.

Delivery tab
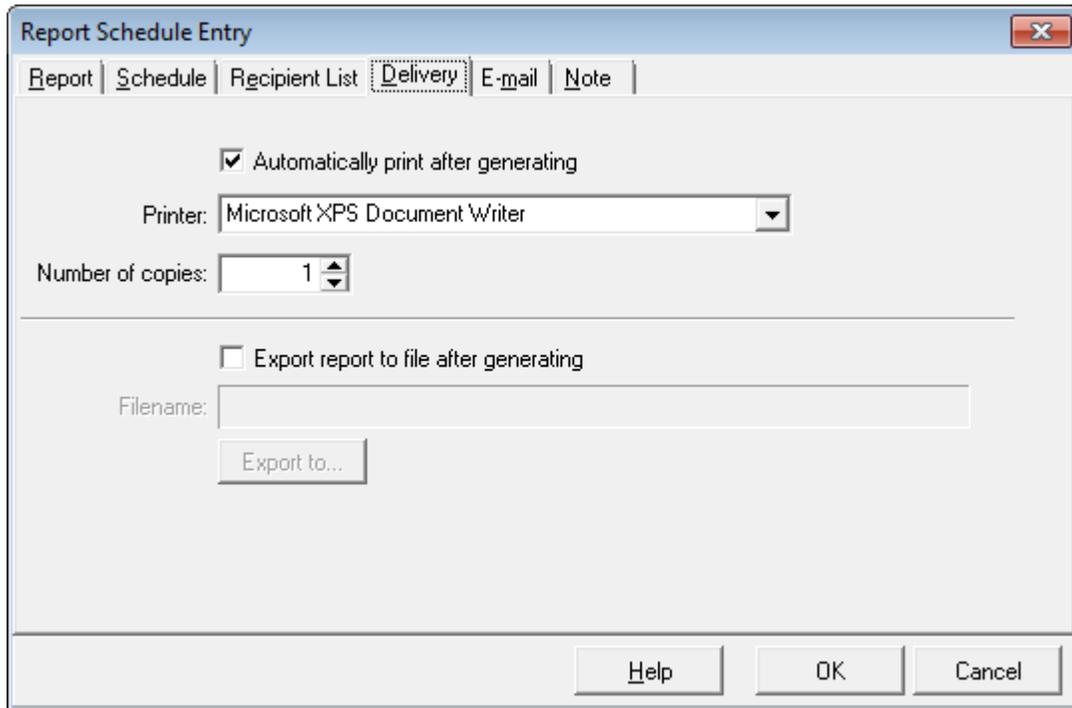
Figure 73. Report Schedule Entry screen - Delivery tab

Options on this tab affect printing and exporting of a produced report.

Printing a Report After Generating

Select the Automatically print after generating check box to send a produced report to a printer. Select the destination printer in the printer list and specify a number of copies.

Only printers with an installed printer driver on the computer running the report server will be available in the printer list.

Exporting a Report After Generating

Produced reports may be exported to a file after being generated. Select the Export report to file after generating check box to export the report.

Click the **Export to** button to display a screen to select the type of export file, the name of the exported file, and the location for the file.

E-mail tab

The E-mail tab is used to define which users will receive reports via email.

Figure 74. Report Schedule Entry screen - E-mail tab

Field	Description
E-mail report after generating	Click the **E-mail report after generating** check box to enable this feature.
New Recipient	Enter an email address in the New Recipient field and then click the **Add** button to add the new address to the E-mail Recipient List.
E-mail Recipient List	Use this list to display the current list of users who will receive a copy of the scheduled report via email. Recipients may be deleted from the list by clicking to select the recipient and then clicking the **Remove** button.
From Email	Use this field to enter an email address. This field is by default populated with the information in the From Email field on the E-mail Options tab. This email address is used as the default name for emailed reports but may be overridden on this tab.

Field	Description
Subject	This field is by default populated with the information in the Subject field on the E-mail Options tab. The subject selected here is used as the default subject for emailed reports but may be overridden on this tab. If needed, select Report Title, Practice Name, or Schedule Name from the Subject list or enter the text to be used for the Subject line of sent email messages.
Reply to Email	This field is by default populated with the information in the Reply To Email field on the E-mail Options tab. If you want report recipients to reply or send comments to a different address than the address used in the From Email field, enter the new address in this field.
E-mail Message	Reports are emailed in Adobe Acrobat (.pdf) format. Adobe Acrobat reader is required to view these reports. The Acrobat Reader is available on your CGM MEDISOFT DVD.

Text entered in this field will be sent as the text portion of the email messages generated by the report schedule. |
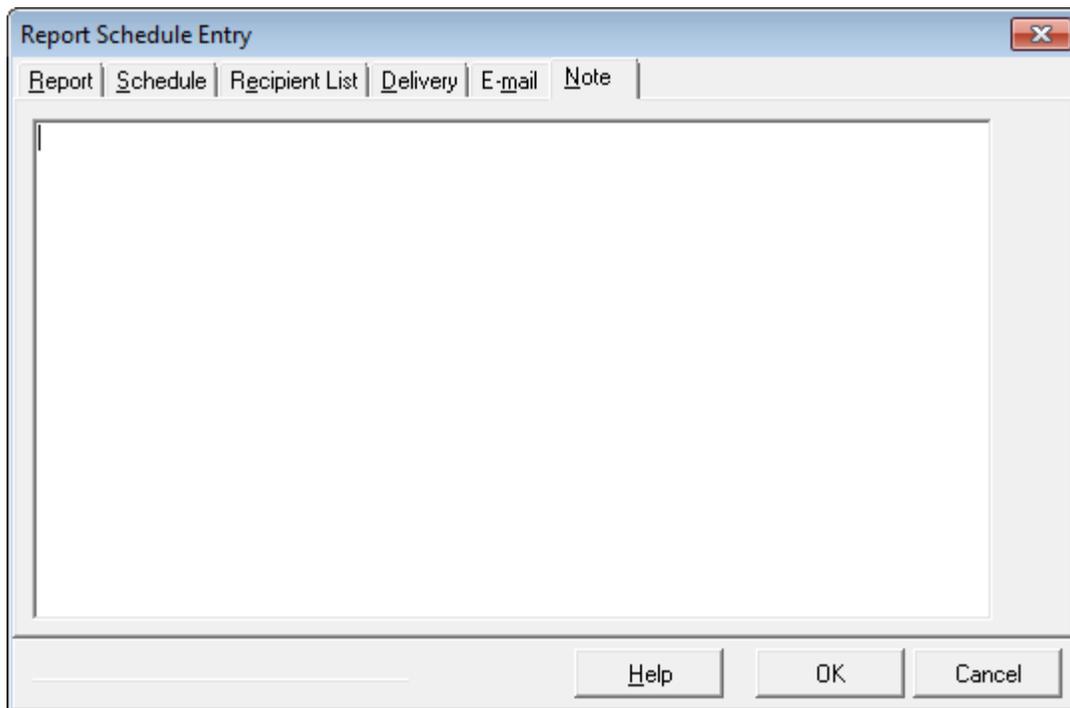
Note tab

Figure 75. Report Schedule Entry screen - Note tab

Use this tab to track additional information about the report schedule. This information is internal to the report and does not appear elsewhere.

Ideas for using this tab include:

*   Recording changes to the timing of the report schedule.
*   An extended description of the group of recipients or the purpose of the report.
*   Information about recipients added to or deleted from a report schedule.

Completed Reports

Completed Reports Tab
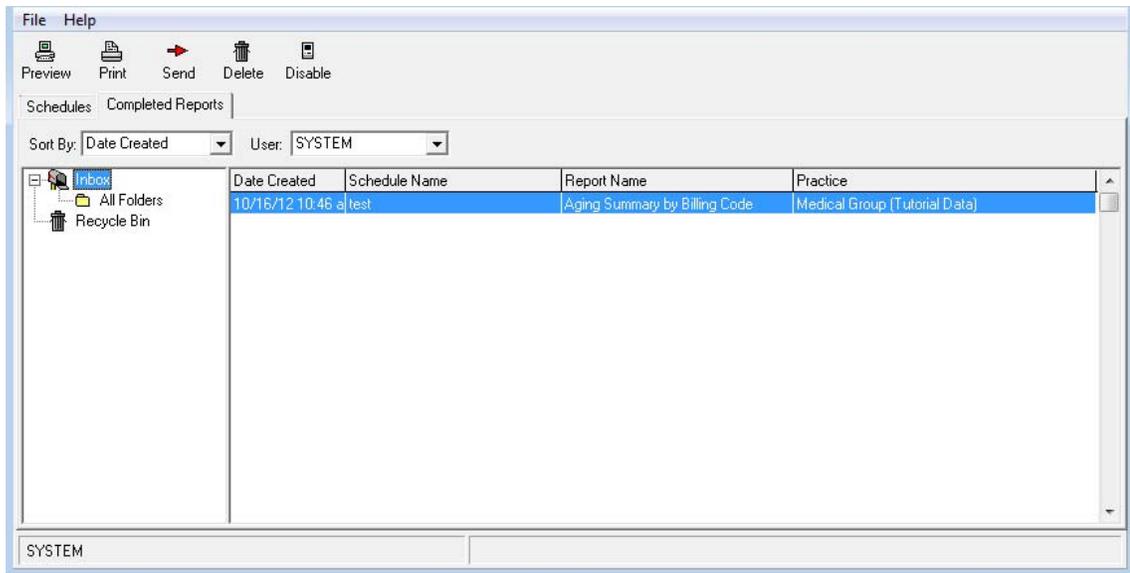
Figure 76. Completed Reports tab

This tab displays completed reports. New reports appear in a user's Inbox and may be moved to any folder of a user's choosing to save the report for future use.

Field	Description
User	Use this to select a user to display reports for viewing.
Sort By	Use this to sort the list of completed reports. The list can be sorted by Date Created, Schedule Name, Report Name, or Practice.
Folders	Displays the folders. A user's Inbox folder is the recipient of newly generated reports. Custom archive folders can be created to store reports for future reference.
Recycle Bin	Delete a folder by right-clicking the folder and clicking **Delete** from the menu.

Completed Reports List

Option	Description
Preview	Use this button to preview reports to the screen. Double-click any report in the Completed Reports list to view the report in a Print Preview screen or click the report and click the **Preview** button.
Print	Use this button to print reports. Reports may be printed from the Completed Reports list or from the Print Preview screen. Print a report from the Completed Reports screen by clicking the **Print** button or right-clicking the report and selecting Print from menu.
Send	Use this to send a report to another user's Report Server Client by clicking the **Send** button or right-clicking the report in the Completed Reports list and selecting Send to User from the menu.

Appendix A - Report Descriptions

While CGM MEDISOFT Advanced and Network Professional give you over fifty standard reports, CGM MEDISOFT Reports Professional includes many additional reports that you can use for analyzing and understanding your practice. These include sets of Focus Reports that provide reports for certain types of practices or certain aspects of a practice. In addition, there is an Aging Power Pack that contains reports that can help you manage collections. Facility Financials group data by facility; and the Plus Pack contains a variety of reports, such as Patient Account Summary and employer reports.

Standard CGM MEDISOFT Reports

These are reports that come with either CGM MEDISOFT Advanced or Network Professional when you purchase that application.

Day Sheets

Report	Description
Patient Day Sheet	Use this to list each patient's name, showing all transactions and a summary of activities for the day.
Procedure Day Sheet	Use this to show a break down by procedure code the activities of the day, summarizing patients treated for each procedure.
Payment Day Sheet	Use this to list the payments made on the requested day and the charges to which the payments are applied.

Analysis Reports

Report	Description
Billing/Payment Status Report (Advanced and above)	Use this to see a thumbnail sketch of the current billing and payment status of each claim. The report shows what has been billed and not billed, what is delayed for some reason, if the carrier is not responsible or has refused the claim, or if the claim is paid in full. An asterisk (*) next to an amount indicates that entity has paid all it is going to pay and the balance, if any, will go to the next responsible payer.
Insurance Payment Comparison (Network Professional only)	Use this to compare the payment records of all carriers in the practice.
Practice Analysis	Use this to see a summary of the activity of a specified period (such as a month), listing each procedure performed, the number of times it was performed, and the total dollar amount generated by each procedure. It shows the average charge, includes any costs involved with that procedure, and calculates the net monetary effect on the practice's income.
Insurance Analysis (Advanced and above)	Use this to see a summary of all claims filed by category (Primary, Secondary, and Tertiary). Claims totals are shown for charges and insurance payments in both dollar amount and percentage.
Referring Provider Report	Use this to display which patients were referred by other practices and the percentage each referral contributes to the overall referred income of the practice, as of the date of that report. The report also includes the UPIN of the referring provider. By blanking out the Referring Provider range in the Data Selection Questions screen, a report can be generated showing what percentage of the entire practice has been referred.
Referral Source Report (Advanced and above)	Use this to see a compilation of the patient list by source (other than provider) and to see how much revenue comes from each source, allowing the practice to identify those sources that send profitable referrals and/or limit those that are costly or nonproductive.
Referral Source Report Facility Report (Network Professional only)	Use this to track patients who are seen at different facilities. The Facility Report assembles the patient list by facility and shows how much revenue comes from each facility, helping you identify which generates the most money/
Unapplied Payment/ Adjustment Report (Advanced and above)	Use this to see any payment or adjustment that has an unapplied amount and where the transaction can be found.
Unapplied Deposit Report (Advanced and above)	Use this to see all deposits that have an unapplied amount.

Co-Payment Report (Advanced and above)	Use this to see a list of all patients who have co-payment transactions. The report shows the amount of the required co-payment, how much was applied, and what was left unapplied. If a patient does not have any co-payment transactions, he or she is not included in the report.
Outstanding Co-Payment Report (Advanced and above)	Use this to see a list of all patients who have outstanding co-payment transactions. The report shows the Co-payment amount expected, the actual amount paid, and the amount due. If a patient has no outstanding co-payment transactions, he or she is not included in the report.
Appointment Eligibility Analysis - Detail Report	Use this to see a list of patients with appointments whose eligibility has been checked, based on criteria entered. It includes detail about the patients, their appointment date and time, the provider name, and reason code. It is an ARRA report designed for showing that the practice is verifying eligibility electronically.
Appointment Eligibility Analysis - Summary Report	Use this to summarize appointments whose eligibility has been checked, based on criteria entered. It is an ARRA report designed for showing that the practice is verifying eligibility electronically.
Electronic Claims Analysis - Detail Report	Use this to see the status of claims, providing a summary of total claims and those that have been filed electronically or by paper. It includes the percentage of claims filed electronically. In addition, it shows detail such as the billing date, insurance carrier, sequence, claim number, patient chart and name, and the status of the claim. It is an ARRA report designed for showing that the practice is verifying eligibility electronically.
Electronic Claims Analysis - Summary Report	Use this to see the status of claims, providing a summary of total claims and those that have been filed electronically or by paper. It is an ARRA report designed for showing that the practice is verifying eligibility electronically.

Aging Reports

Report	Description
Patient Aging	Use this to see the aging of your patient's balances over time. This can be printed showing the age of each unpaid transaction for patients. Default aging criteria is based upon the number of days between the creation of the transaction or claim and the date of the report you are generating. The columns break down the amounts due that are 30, 60, and 90+ days old. Aging is from actual date of the transaction, so it reflects the true age of the account. The aging criteria and columns can be altered in Program Options. This report includes all unapplied amounts in the totals. The Date filter has been removed as it would return invalid values.
Patient Remainder Aging (Advanced and Network Professional only)	Use this to see patient balances without including insurance charges. A charge does not show up on Patient Remainder Aging until all insurance responsibility has been marked complete.
Patient Remainder Aging Detail (Advanced and Network Professional only)	Use this to see a list of each insurance company on the patient's account and the date the insurance payment was marked complete.
Insurance Aging and Summary	Use these reports (Primary, Secondary, and Tertiary) to track aging of claims filed with insurance carriers. The summary versions are similar but no patient information is included.

Production Reports

Report	Description
Production by Provider, Procedure, and Insurance and Summary	Use this to see incoming revenue information for each provider, procedure, or insurance carrier, respectively. The difference between these reports and the summary versions of the reports is that the summary reports do not display as much detailed information as the regular reports. The summary reports display only a summary of the information available.

Activity Reports

NOTE: This is a Network Professional only feature.

Report	Description
Daily/Monthly Activity Report	Use this to see financial activity based on the date range selected. The report displays the total number and the total amounts of the charges, payments, and adjustments entered during a date range. The report also details the net effect of the financial information entered on the Accounts Receivable balance for the day/month.

| Activity Summary by Provider/Insurance and Procedure | Use this to see a break down of financial activity by day or month. The summary reports summarize financial information entered for each provider/procedure or insurance carrier, respectively. |

Collection Reports

NOTE: This is an Advanced and above feature.

Report	Description
Patient Collection Report	Use this to see information based on statements marked Sent in the Statement Management screen, showing what has not been paid, statement date, etc. Also select Patient Collection Report (Statement Notes) to generate the report with statement notes included.
Insurance Collection Reports	Use this to see claim data on the selected insurance level—primary, secondary, or tertiary. This report also shows the claim data, what amount is outstanding, and so on. These reports also offer variants that include claim notes.
Patient Collection Letters	Print this report in preparation of collection letters. It contains information from the collection list and is used to help evaluate collections. To access this report, go to the **Reports** menu, select **Collection Reports**, and then **Patient Collection Letters**.
Collection Tracer Report	Use this to see how many collection letters have been sent and when. Each time collection letters are printed, CGM MEDISOFT, by default, keeps track of each letter sent.

Audit Reports

Report	Description
Audit Generator	Use this to create a Data Audit Report that contains only the information you want included in the report. The tables available in the Audit Generator are governed by choices made in the Audit tab of the Program Options screen and whether a table has been edited. You choose which tables, fields, users, and activities are included in the template. This report is intended as a protection for the practice to keep track of changes made and, if desired, by whom. Some PHI (personal health information) will be included in the Data Audit Report no matter what selections are made or excluded in the Program Options screen or the Audit Generator.
Patient Ledger	Use this to see the account status of each patient. Charges are shown until a payment is entered to remove a specific procedure paid. You may include all patient accounts or select a few. The patient ledger is similar to a ledger card in a manual accounting program. Since the CGM MEDISOFT program is a true Open Item Accounting program, it can show all or part of the financial activity for a patient, including the current balance and what procedures have not been paid. Past activity in the account includes a listing of all transactions, indicating those that have been paid. The report marks those transactions that have been paid and the amounts.
Guarantor Quick Balance List (Network Professional only)	Use this to see a list of the guarantor quick balances that appear in the Quick Balance feature. These balances are the guarantor remainder balances. If there are charges that the insurance company has not paid on yet, then they are not reflected in this report.

Reports in Reports Professional

You can use these reports when you purchase CGM MEDISOFT Reports Professional. They include sets of reports that focus on a certain type of practice or a certain aspect of a practice (Focus reports), as well as other reports that enhance the reporting capabilities of CGM MEDISOFT.

Aging Power Pack

Report	Description
Aging Summary by Billing Code	Use this to print a one-line aging summary for current, 30, 60, 90 and 120+ days aging amounts by patient category.
Date-Accurate Patient Aging	Use this to see patient account aging information by date of service or statement date, accurate as of any past end of period date.
Limited Period Aging Reports	Use this to see reports that include only patients whose balances are over 30 days, over 60 days, or over 90 days old.
Patient Aging Sorted by Account Balance	Use this to view collection efforts arranged by patients with highest account balances.

Facility Financials

Report	Description
Adjustments by Facility - Chart	Use this to print a pie chart showing the proportion of account adjustments entered for patients treated at each facility served by a practice.
Charges by Facility - Chart	Use this to print a pie chart showing the proportion of payments entered for patients treated at each facility served by a practice.
Daily Activity Summary by Facility	Use this to see a daily summary of charges, payments and adjustments grouped by service facility.
Patient Aging by Facility	Use this to list patient accounts receivable aging grouped by service facility. Two versions are included to age accounts by date of service and date of last statement.
Patient Daysheet by Facility	Use this to print a patient daysheet grouped and totaled for each service facility.
Payment Daysheet by Facility	Use this to print a payment daysheet grouped and totaled for each service facility.
Payments by Facility - Chart	Use this to print a pie chart showing the proportion of payments entered for patients treated at each facility served by a practice.
Practice Analysis by Facility	Use this to print a practice analysis grouped and totaled by service facility.
Procedure Daysheet by Facility	Use this to print a procedure daysheet grouped and totaled for each service facility.

Focus on Chiropractic

Report	Description
Financial Statistics	Use this print a daily summary report that tracks a practice's financial details including charges, payments, adjustments, patient visits, and services performed are all summarized with graphs. It includes three versions for current month, current year and the prior year periods.
Productivity and Retention Statistics	Use this to track statistics on scheduled and completed patient visits, new patients, and reactivated existing patients. It also tracks patient visit productivity, missed appointments to aid in follow-up activities, and quantify reactivated existing patients. Includes versions for current month, current year, and prior year.
Marketing Analysis - Referral Source	Use this to print a summary of new patients, existing patients, total patient visits with resulting financial effect by month for each referral source. Versions of the report include current and prior year periods.
Marketing Analysis - Referring Provider	Use this to print a summary of new patients, existing patients, total patient visits with resulting financial effect by month for each referring provider. Versions of the report are include current and prior year periods.
New Patients by Marketing Campaign	Use this to show a pie chart comparing the effectiveness of each referral source in generating new patients.
New Patients by Referring Provider	Use this to show a pie chart comparing the effectiveness of each referring provider in generating new patients.
New Patient Contribution - Individual Marketing Campaign	Use this to track new patient revenue based one marketing effort over time, for instance, an advertisement in a particular publication.
New Patient Contribution - Individual Referring Provider	Use this to help you analyze new patient contribution over time for one referring provider.
Collection Statistics Detail	Use this to see a summary of total charges and collections by patient while dividing the report into new patient and existing patient groups. Three versions of this report measure month to date, year to date and prior year periods.
Collection Statistics Summary	Use this to see a summary of total charges and collections for new patient and existing patient groups. Three versions measure month to date, year to date and prior year periods.
Patient Birthday List	Use this to print patient birthdays for current month or next month. The report also lists patient demographic information.
Patient Birthday Labels	Use this to print mailing labels using the patient birthday list data.

Focus on Managed Care

Report	Description
Insurance Pay Analysis	Use this to see a comparison of procedure charges, allowed amounts, payments, and average days to pay. Major grouping by procedure, summary totals for each insurance carrier or plan.
Procedure Payment Analysis By Carrier	Use this to analyze all procedures billed to an insurance carrier or plan, reports capitated and fee for service charges, payments and adjustments by carrier.
Patient Census By Carrier	Use this to see the patient count impact of a plan. It includes a major data grouping by insurance plan, detail listing of each patient member of the plan.
Patient Census By Carrier, Provider	Use this to see provider subgroupings to the Patient Census By Carrier report.
Insurance Plan Profitability Analysis	Use this to print detailed information by carrier with billed procedures, payments, adjustments, patient payments and net profit based upon standard cost. Both fee for service and capitated plans are supported.
New Patients By Carrier Chart	Use this to see the plan membership of newly acquired patients.
Charges By Insurance Type Chart	Use this to analyze the distribution of a practice's fee for service charges by insurance carrier type.
New Patients By Month Chart	Use this to print a chart that analyzes new patient count by month.

Focus on Financials

Report	Description
Flash Report - Month To Date	Use this to see a daily one page all-in-one report. It can print daily totals of charges by type, payments by source, adjustments, and charts for daily charge and payment trends.
Flash Report - Year To Date	Use this to see a monthly all-in-one report. It can print monthly totals of charges by type, payments by source, adjustments, and charts for monthly charge and payment trends.
Provider Charge Comparison Table	Use this to see a procedure charge comparison by provider with monthly and yearly totals.
Daily Provider Activity Detail	Use this to print a daily financial report grouped by provider with detailed charge, payment and adjustment listings by patient.
Daily Provider Activity Summary	Use this to print a daily financial report grouped by provider with charge, payment and adjustment summary totals by patient.

Provider Financial Report	Use this to create a provider-specific listing of monthly charges, adjustments, payments and withholds. Includes monthly net change in accounts receivable.
Charge Trend Chart	Use this to print a chart that shows a practice's procedure charges over a specified time period.
Payment Trend Chart	Use this to print a chart that shows a practice's receipts (all types) over a specified time period.
Adjustment Trend Chart	Use this to print a chart that shows a practice's account adjustments (all types) over a specified time period.
Combined Financial Trend Chart	Use this to print a chart that combines charges, payments and adjustments trends. You can produce it for any time period.

Focus on Marketing and Promotion

Report	Description
Marketing Analysis - Referral Source	Use this to print a summary of new patients, existing patients, total patient visits with resulting financial effect by month for each referral source. Versions of the report include current and prior year periods.
Marketing Analysis - Referring Provider	Use this to print a summary of new patients, existing patients, total patient visits with resulting financial effect by month for each referring provider. Versions of the report include current and prior year periods.
New Patients by Marketing Campaign	Use this to print a pie chart comparing the effectiveness of each referral source in generating new patients.
New Patients by Referring Provider	Use this to print a pie chart comparing the effectiveness of each referring provider in generating new patients.
New Patient Contribution - Individual Marketing Campaign	Use this print a chart of new patient revenue based on one marketing effort over time, such as a advertisement in a particular publication.
New Patient Contribution - Individual Referring Provider	Use this to help you analyze new patient contribution over time for one referring provider.
Patient List by Zip Code	Use this to print a list of patients by zip code.
Patient List by Zip Code with Patient Totals	Use this to show total billing by patient in each zip code.
Patient Labels by Zip Code	Use this to print labels based on a specific zip code.
Patient Attrition Report	Use this to print a list of patients that have not been seen for a defined period of time.
Patient Attrition Labels	Use this to print mailing labels based on patient attrition data.
Patient Birthday List	Use this to see a list of patient birthdays for the current month or next month. The report lists patient demographic information for use in relationship-building activities.
Patient Birthday Labels	Use this to print mailing labels based on the patient birthday list.

Plus Pack

Report	Description
Attorney Summary	Use this to print a summary report with one page per patient with each charge and their detailed payments and adjustments.

Collection Detail by Procedure Code	Use this to create a report that will show collection information by procedure code. Filter the report by a range of service dates and a range of payment dates. Reports on charges made in one period and payments received in another.
Collection Summary by Provider	Use this to print a provider grouping of charges and collections for those charges from different periods.
Collection Summary by Procedure Code	Use this to print a summary of collections by procedure code. Filter the report by a range of service dates and a range of payment dates. Reports on charges made in one period and payments received in another.
Daily Appointment Count by Reason Code	Use this to print a listing of appointments by reason code.
Daily Deposit Summary	Use this to print a listing of deposits entered by day and type.
Immunization History	Use this to print a report of all procedures performed for a patient that fall in the procedure code range for immunizations. This report will print one patient per page.
Insurance Payments by Type	Use this to see a summary of payments in a date range by insurance carrier type.
Insurance Payments by Type - Chart	Use this print a pie chart of insurance payments by type.
Overpaid Charges	Use this to produce a list of overpaid charges with summary payments and adjustments by source.
Patient Email Export	Use this to export patient email addresses.
Patient List by Outside Primary Care Provider	Use this to create a list of patients by outside PCP.
Patients by Outside Primary Care Provider - Chart	Use this to print a pie chart of outside primary care providers by patient count.
Patient List by Primary Diagnosis	Use this to create a list of patients by the primary diagnosis in billing transactions.
Patient Mailing Labels - Zip Sort	Use this to print mailing labels by zip code.
Patients by Zip Code - Chart	Use this to print a list of patients by zip code in pie chart.
Practice Analysis Grouped by Account Code	Use this print to a report of charges, payments, and adjustments in a practice's general ledger by account code.
Procedure Code Reimbursement	Use this to print a listing of procedure code reimbursements from all sources.
Procedure Code Units by Month	Use this to print a monthly table, listing a year's information on quantities of services performed.
Procedures Billed Pie Chart	Use this to print an analysis of the number of procedures billed during a time period.
Remainder Statement (with Aging)	Use this to print a plain paper format of the patient remainder statement with remainder balance aging.

Remainder Statement (Insurance Pending)	Use this to print a plain paper format of patient remainder statement with detailed charges that are pending insurance response. Note: Does not work internally with CGM MEDISOFT statement management functions.
Remainder Statement (Insurance Pending Day Summary)	Use this to print a plain paper format of patient remainder statement with balance currently due from patient and other charges that are pending insurance. Note: Does not work internally with CGM MEDISOFT statement management functions.
Unapplied or Partially Applied Adjustments	Use this to print a report of account adjustments that have been entered but not applied.
Unapplied or Partially Applied Payments	Use this to help you with open-item accounting, by confirming that payments have been completely applied.
Unbilled Secondary/Tertiary Claims	Use this to see a list of secondary or teritary claims for which a response was received from the primary carrier but have not yet been billed.
Appointment List with Remainder Balance	Use this to see a list of standard appointments from Office Hours with the patient remainder balance.
Employer Statement	Use this to print a bill when employers are paying for a patient's services.
Guarantor Mailing Labels	Use this to print guarantor mailing labels on standard Avery 5160 (and compatible) address labels. It also lists the patient for whom the guarantor is responsible.
Patient Account Summary (with Drill Down)	Use this to see all payments and adjustments categorized by source that have been applied to a charge. This version of the report offers a click-to-display drill-down area to show payment and adjustment detail.
Patient Account Summary	Use this to see all payments and adjustments categorized by source that have been applied to a charge.
Patient List by Attorney	Use this to print a list of patients grouped by attorney.
Private Pay/Insurance Financial Comparison	Use this to see a summary of charges, payments and adjustments by insurance category. It also includes cash (no insurance assigned) cases in the analysis.
Private Pay/Insurance Patient Census Detail	Use this to see a list of patients grouped by insurance category with an additional section for cases with no insurance.
Private Pay/Insurance Patient Count	Use this to print a summary count of the number of cases assigned to each insurance category with an extra grouping of cases with no insurance assigned.
Zero Balance Open Cases	Use this to see a list of open cases where all charges have been paid or adjusted.

Glossary

This section defines terms used in the CGM MEDISOFT v30.

Advantage Database

This is the database that is used to store and manage your practice data in CGM MEDISOFT. It is accessed by Reports Professional when you create and print reports.

Band

This is a section of a report, such as the Header or Footer. Your reports will also have a Details band where data will be displayed.

Data Pipeline

This is a term used in Reports Professional to refer to a query created in the Query Wizard or the Query Designer

DB

This is an abbreviation for Database.

InstallDef.ini

This is a file that will go on any CD/DVD you make for distributing your reports. It contains information regarding who made the report, that person's company/practice, and contact information.

POP3

Post Office Protocol (POP) is an Internet standard protocol (set of formats and regulations) used by local e-mail clients to retrieve e-mail from a remote server.

RAP

Report Application Pascal is a programming language that CGM MEDISOFT Reports Professional uses on the Calc workspace for handling calculations and data manipulation.

SMTP

Simple Mail Transfer Protocol (SMTP) is an Internet standard for electronic mail (e-mail) transmission across Internet Protocol (IP) networks.

SQL

Structured Query Language is a programming language designed for managing data in relational database management systems.

SSL

Secure Socket Layer is a protocol for encrypting information over the Internet. It ensures that your mail is encrypted and protected.

System Tray

This is the set of icons located on the Windows screen at the bottom right.

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