



myMPS

How to guide

Using Reports

Under the '**Reports**' tab, you will find the following sections and reports:

- Calendar
 - '**Appointment report**' - full view of all patients that visited the practice.
- Reconciliation
 - '**View eRA**' - view any remittance that was sent to the system electronically.
 - '**View paper RA**' - view medical aid payments which have been manually captured on the system

- **'eRA delivery schedule'** - shows you when you can expect to see remittances in the system for the next 3 months.
- Collections
 - **'Collectable amounts report'** - view all invoices with patient liable amounts.
- Financial
 - **'Age analysis report'** - view all invoices with outstanding balances in the different ageing periods.
 - **'Claim report'** - view all claims that have been submitted using the system.
 - **'Credit notes report'** - details credit notes that have been processed on the system
 - **'Insurance claims report'** - view details of medical insurance claims captured on the system.
 - **'Journal report'** - details financial transactions coming from schemes.
 - **'Line items report'** - view the quantities and values of consumables and medicines that were billed during a selected period.
 - **'Monthly transaction report'** - view a summary of all medical aid transactions for the selected month.
 - **'Payments report'** - view a detailed or summary view of all payments that have been captured on the system.
 - **'Private rates report'** - view the private rates for the practice, as defined for the selected year.
 - **'RA suspense report'** - details all payments that couldn't be matched to a claim in the system.
 - **'Reversed transactions report'** - view all of the reversed transactions (invoices and credits) that were reversed during a selected date range.
 - **'Unroutable claims report'** - view claims that could not be automatically routed by myMPS.
 - **'Write-off report'** - view all patient liable amounts that have been written off as bad debt or small balance.

Working with report parameters

Each report has a defined set of parameters/filters that you are able to make use of to filter the data that is returned in the report. Eg:

- The '**View eRA**' report.

The 'View eRA' form includes a title 'View eRA' and a red 'Disabled parameter' label. It contains several input fields: 'Scheme' (a dropdown menu showing 'Nothing selected'), 'EFT no.' (a text box), 'eRA from date' (a date box with 'dd/mm/yyyy' placeholder), 'eRA to date' (a date box with 'dd/mm/yyyy' placeholder), 'Date of service from' (a date box with 'dd/mm/yyyy' placeholder), 'Date of service to' (a date box with 'dd/mm/yyyy' placeholder), 'Member no.' (a text box), and 'Account no.' (a text box). At the bottom right are 'Clear' and 'Search' buttons.

- The '**Monthly Transaction Report**'.

The 'Monthly Transaction Report' form has a title 'Monthly Transaction Report' and a descriptive paragraph: 'This report summarises the debits and credits that are linked specifically to each treating doctor. All invoice types are included: cash, medical aid and medical insurance.' It features dropdown menus for 'Date range type' (set to 'Invoice date of service'), 'Month *' (set to 'November'), 'Scheme' (set to 'All'), and 'Treating provider' (set to 'All'). It also has 'Year *' (set to '2018') and 'Select format *' (set to 'PDF') dropdowns. 'Clear' and 'Generate' buttons are at the bottom right.

- The '**Private Rates**' report.

The 'Private Rates' form has a title 'Private Rates' and a descriptive paragraph: 'This report shows the private rates for the practice, as defined for a selected year.' It includes a 'Year *' dropdown menu set to '2018'. 'Clear' and 'Generate' buttons are at the bottom right.

For large reports, eg. the '**Age analysis report**', you have the option to email the report through rather than waiting for it to be generated. This will save you a great deal of time compared to waiting for the reports to be generated.

The 'Age analysis report' form includes a title 'Age analysis report' and a descriptive paragraph: 'This report could take a few minutes to generate, due to the number of possible records involved. We recommend that you choose to rather email the report, so that you can continue working while it is being generated.' It features a checked checkbox labeled 'Email the report once it has been generated'. Below this is another paragraph: 'The report will be generated and emailed to the address provided below. You can expect to receive the email within 30 minutes.' An 'Email address' text box contains 'user@mail.com'. 'Clear' and 'Generate and email' buttons are at the bottom right.