

Reports

Daysheets

Daysheets are daily reports detailing patient visits and the billing for these visits. Each doctor could have their own daysheet printed (or viewed on screen) to enable them to easily check the day's activity, reconcile with the appointment book if required and confirm billing was performed correctly. Details of adjustments can also be included.



1. Click on the **Daysheet icon** or Reports > DaySheet.
2. 'Visits Recorded' will list today's billings or click on 'Report Type' and choose another report eg. Receipts Issued, Till Summary, Receipts Allocated or Adjustments.
3. Click on 'All Practitioners' or 'Single Practitioner' and select by the code (initials).
4. Tick to 'Group by Invoice to type' (ie. Grouping bulk bill, private or 'other' billing types) and/or tick to 'Show Totals' ie money received or 'Include Adjustments'.

Daysheet Reports - Reconcile with Appointment Book

Report type: Practitioner selection: All practitioners Single practitioner

Daysheet date: Practitioner:

Date selection:

Display options

- Group by invoice to type
- Include adjustments
- Show totals
- Separate page per practitioner

	Visit Time	Patient	Practitioner	Type	Item No	Fee	GST	Amount	Account No	User ID
1	2:02 PM	Anderson, David	AP	Veterans	10990	\$6.65	\$0.00	\$0.00	0	AP
			AP	Veterans	23	\$34.30	\$0.00	\$0.00	0	AP
2	2:04 PM	ANDREWS, MAX	AP	Bulk Bill	10990	\$5.70	\$0.00	\$0.00	0	AP
			AP	Bulk Bill	23	\$34.30	\$0.00	\$0.00	0	AP
3	2:04 PM	ANDREWS, MAUREEN	AP	Bulk Bill	23	\$34.30	\$0.00	\$0.00	0	AP
4	2:04 PM	Baker, Stephen	AP	Bulk Bill	11700	\$25.10	\$0.00	\$0.00	0	AP
			AP	Bulk Bill	36	\$65.20	\$0.00	\$0.00	0	AP
5	12:56 PM	ANDREWS, JENNIFER...	IF	Private	23	\$65.00	\$0.00	\$0.00	2	AP
6	1:32 PM	ANDREWS, HEATHER	IF	Private	36	\$125.00	\$0.00	\$125.00	3	AP
			IF	Private	11700	\$55.00	\$0.00	\$55.00	3	AP
7	2:05 PM	ZANBUCK, JODIE	IF	Bulk Bill	36	\$65.20	\$0.00	\$0.00	0	AP
8	2:05 PM	DILLON, JOE	IF	Bulk Bill	36	\$65.20	\$0.00	\$0.00	0	AP
9	2:05 PM	DONNELLY, GEORGE	IF	Bulk Bill	11700	\$25.10	\$0.00	\$0.00	0	AP
			IF	Bulk Bill	23	\$34.30	\$0.00	\$0.00	0	AP

Export Refresh Print Close

5. **Print** – this will print to your screen so you can view the report. To send to the printer you will then need to click on the Printer icon.



Tip: Doctors are set-up in PracSoft to either see only their 'Own billings' or 'All Practitioner billings'. This is set up from the drop-down menu Admin > User List > Edit.

Exercise

1. Print daysheets for all doctors listing all visits recorded today.
2. Print a daysheet for Dr Practitioner for all visits recorded today, showing totals.

