Custom Report Request Form

Thank you for your interest in ordering a custom report for your software. Please take a few moments to read the following information to ensure we can build the report to best suit your specific needs.

What is the process of commissioning a custom report?

After completing this form, one of our report writers will contact you via phone or email within two business days. The purpose of this call will be to clarify any finer points of your request to ensure the program they build will be exactly what you need. This conversation may be brief, but may take as long as twenty minutes depending on the complexity of your request. The report writer may have several questions about seemingly trivial details. This can be time consuming, but it assures the report will be versatile for your practices needs. After the conversation, an email will be sent with a specific proposal of the report to be built, a timeline to complete it and any charges involved in building it. The process of building your report will begin as soon as you send back a confirmation email agreeing to the terms of the email.

When the report is complete, a second appointment will be set up to install and test the report. This will generally only take a few minutes. The report writer will run the report with whatever criteria you wish to test it with to ensure the report is to your specifications. Payment will be collected at the time of delivery unless other arrangements have been made ahead of time.

What if I change my mind about the functionality of the report?

Please read the report description sent to you carefully. Once you agree, this is the exact report that will be built for you. Any requests for changes after this point may be possible, but even small changes in the functionality of the report after this point may require building a new report at additional cost.

How do I report errors in the report after delivery?

All reports come with 60 days of technical support. If the report does not function in the ways described in your initial email description, the report will be repaired either by technical support or the original programmer. Depending on the complexity of the fix, this can be done via a phone call or by setting up an appointment.

What will this report cost?

The cost of the report is dependent on the complexity of the report and the time required to build it. A report in the form of a list (Patient demographics, payment history, etc) will typically be priced at $199. More complex reports including aging reports, superbills, statements, claim forms or multifunctional reports can cost more.

Are there alternatives to ordering a new report?

Yes. We will attempt to find a free solution with you whenever possible. Often times, an existing report in our system can provide the same information as a report you are looking for. Sometimes this information can be found elsewhere in the system. We will make all attempts to find you solutions that currently exist in your system.

Why don't these existing reports match?

It is common to receive requests for a "fix" to an existing report because the numbers do not match between reports. While it is always possible that an error exists, it is typically the case that the two reports in question are not measuring the same information. If you believe two reports should show the same results and they are not, please contact technical support before requesting a custom report. They may be able to explain the difference between the two reports and help you determine which one is more applicable to your needs?

A special note on deposits and payments:
It is common to think of deposits made in your "Payments" screen and transactions made your "Ledger" screen as interchangeable. These numbers are not actually representative of the same thing. As a result any report measuring payments (such as Deposit Slip Report) will not match a report which measures transactions (such as Day Sheet). If you are unclear on the difference between the two, please consult the software manual or speak with one of our software trainers.

What information should I include in my request?

The more information you can include in your request, the better. Some pieces of information can be very helpful in accelerating the process. The following information is not only useful for the programmer, but useful for you to think about and discuss with your staff to make sure everyone in in agreement as to your needs.

1. *What is this a list of?*
   Although most reports can be formatted to be very aesthetically complex, they are essentially lists of things. Usually they are lists of patients, transactions or claims. Please think about exactly what this report will be a list of.

2. *What are the search criteria?*
   It is very uncommon for a report to be run with no search criteria. Typically, a report will need to be run for a specific date range, a specific group of patients, providers, insurance companies or facilities. Please consider which search criteria you would like for the report.

   A note on dates: Many financial reports will have a date range. Keep in mind that a single transaction has many dates attached to it; date of procedure, date entered into system, date of claim creation, date of insurance payment, etc. When creating a report with a date range, please consider exactly which date is being taken into consideration

3. *How will this information be sorted and grouped?*
   Most times, the information being presented is most readable when sorted in a particular way. Do you want the report to list results chronologically, alphabetically? There are many ways to sort the information

   Once the information is sorted, it can also be grouped into smaller sections. For example, a list of patients could be grouped together based on their default provider, or by their head of household. Not all reports require information to be grouped together, but the option is available when needed

4. *Identifying labels*
   It is not uncommon to have a request to build a report that existed in another piece of software. We are happy to recreate these reports as closely as possible. In those cases, please identify what the specific columns and rows from the existing report represent so we can best match them (Patient name is pretty self-explanatory, but not all column headings are)

Please fill out the following page as completely as possible and send it to reports@totalmd.com or fax it to (480) 924-1974.

Custom Report Request Form

Customer: ____

Contact Name: ________________________ Contact Phone: ______________________

Date Received: ________________ Desired Completion Date: _____________________

Similar
Report(s):____

Type of List (Patient, transaction, etc): _______________________________________

Search Criteria: ____

Sorted by: ____

Description (Detailed description of desired report. If possible attach an example):
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