

## Configuring Capture Rate Report

### 1. Go to Admin – Defaults – Report Defaults

Default Values

Page: Report Defaults \* = default item

Capture Rate

Value	Billing Code	Equation / Criteria
\$Cont Lens		[CL Total]
\$Frames		
% CL		[Cont Lens] * 100 / [CL Total]
CL Total		
Cont Lens		[CL Total]
Frames		
Medical Exam NP		
Medical Exam PP		
Sales		[Frames] * 100 / [Total]
Spec Exam NP		
Spec Exam PP		
Spec/CL Exam NP		
Spec/CL Exam PP		
Total		

Buttons: Add Item, Remove, Up, Down, Set Default, Add Billing Code, Remove Billing Code, Alpha, Capture HELP, Add Criteria / Eqn

- You will notice you already have several values and equations entered, but no billing codes. This is because everyone's codes are different. We just need to link YOUR codes to the values.
- We'll start with Medical Exam NP. Just highlight the line, then click Add Billing Code. You will now get a popup box with your codes. Select the appropriate code(s) then click "Select". Multiple codes can be selected by holding down the Ctrl key on your keyboard.

5/25/1976 Billing Code Search

Station

Please select one or more:billing codes:

Search Bill ID: Search Code: 99201 Search Description:

Billing Code	Proc Code	Description	Category
Exam M I NP	99201	Examination Level I - New Patient	Professional ...
VSP Chol Bonus 1	99201	Examination Level I - New Patient	VSP Chol Bo...
VSP DM Bonus 1	99201	Examination Level I - New Patient	VSP DM Bon...
VSP HTN Bonus 1	99201	Examination Level I - New Patient	VSP HTN Bo...

Buttons: Select, Cancel, Search Category: [Dropdown]

Criteria

[Frames] \* 100 / [CL Total]

Exam M I NP : Examination Level I - New P...

[Frames] \* 100 / [Total]

4. Just keep doing this for all remaining values that require a billing code. Example: Frames will be V2020
5. For Total, you can create an equation that contains all of your values, OR you can go through and add all of the billing codes from the previous values. The equation example here would be:  
 $[Frames]+[Cont\ Lens]+[Medical\ Exam\ NP]+[Medical\ Exam\ PP]+[Spec\ Exam\ NP]+[Spec\ Exam\ PP]+[Spec/CL\ Exam\ NP]+[Spec/CL\ Exam\ PP]$
6. Your window should now look something like:

Value	Billing Code	Equation / Criteria	
\$Cont Lens		[CL Total]	
\$Frames			
% CL		$[Cont\ Lens] * 100 / [CL\ Total]$	
CL Total		$[Spec/CL\ Exam\ NP]+[Spec/CL\ ...]$	
Cont Lens	V2599 : Contact Lens - Other type    V2531 ...		
Frames	Special Order Frame : Special Order Fram...		
Medical Exam NP	Exam M I NP : Examination Level I - New P...		
Medical Exam PP	Exam M I EP : Examination Level I - Establi...		
Sales		$[Frames] * 100 / [Total]$	
Spec Exam NP	Comp. Exam NP_V : Comprehensive Exa...		
Spec Exam PP	Comp. Exam EP_V : Comprehensive Exa...		
Spec/CL Exam NP	Comp. Exam NP_V : Comprehensive Exa...		
Spec/CL Exam PP	Comp. Exam EP_V : Comprehensive Exa...		
Total		$[Frames]+[Cont\ Lens]+[Medical...]$	

7. You are now ready to run your report!

**TIP: WHEN RUNNING THE REPORT, YOU WILL MORE THAN LIKELY WANT TO SPECIFY AN EMPLOYEE INSTEAD OF RUNNING FOR ALL EMPLOYEES. PROVIDERS AND STAFF MAY SHARE A SALE, SO ON THE REPORT EACH WILL GET CREDIT FOR THE ITEM. THIS CAN MAKE 1 ITEM SOLD APPEAR AS 2 IN THE TOTAL SECTION.**