## Configuring Capture Rate Report

1. Go to Admin – Defaults – Report Defaults

Rationt Billing	Taka Sabaduk Jawatan Daarta Daarta Adain	Change User Close			
Billing					
Company	Delault values	* = default item			
Computers	Page: Report Defaults	- deradit item			
Credit Card	Capture Rate				
Defaulte	, <u> </u>				
Dian Cadaa		1			
Diag Codes	Value	Billing Code	Equation / Criteria		
E Claims	\$Cont Lens		[CL Total]		
E Prescribe	\$Frames				
Email	% CL		[Cont Lens] * 100 / [CL Total]		
Employees	CL lotal				
Insurance	Cont Lens		[CL lotal]		
Integrations	Frames				
Inventory	Medical Exam NP				
Invoices	Sales		[Frames] * 100 / [Total]		
MS Word	Spec Exam NP				
Patients	Spec Exam PP				
PQRS	Spec/CL Exam NP				
Recall	Spec/CL Exam PP				
Reports	Total				
Routing Slip					
Schedule					
Tasks					
TimeClock					
Undates	Add Item Remove Up Down Set Def	ault Add Billing Code Remove Billing Code	Alpha		
VisionWah	Capture HELP Add Criteria / Eqn				
VISIONVED					
VSP					

- 2. 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.
- 3. 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	b Billing Code Search	ı				- 🗆 X	
Tasks	Please select o	one or more:I	billing codes:				
Defau	Search Bill ID:		Search Code: 99	201	Search Description:		
F	Billing Code	Proc Code	Description			Category	
Captu	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		
Value	VSP HTN Bonus 1 99201 Examination Level I - N			- New Patient		VSP HTN Bo	Criteria
\$Cor	n l						
\$Frai							
% CL	L						5] * 100 / [CL Total]
CLIC	Tc						
Cont			Selec	t Cancel	Search Category:	~	
Fram				Even MUND	· Examination Lowell No	w D	
Medical Exam NP Exam MTNP : Examination LevelT - New P							
Salas						Eramos	1 * 100 / [Total]
Spec Evam ND						[i fuffice	ij 1007[10talj
Spec Exam PP							
Spec/CL Exam NP							
Spec/CL Exam PP							
Total							

- 4. Just keep doing this for all remaining values that require a billing code. Example: Frames will be V2020
- 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/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 Orde	er Fram
Medical Exam NP	Exam IvI I NP : Examination Level I -	New P
Medical Exam PP	Exam IVITEP : Examination LevelT-	Establi
Sales		[Frames] * 100 / [Total]
Spec Exam NP	Comp. Exam NP_V : Comprehensiv	ve Exa
Spec Exam PP	Comp. Exam EP_V : Comprehensiv	ve Exa
Spec/CL Exam NP	Comp. Exam NP_V : Comprehensiv	ve Exa
Spec/CL Exam PP	Comp. Exam EP_V : Comprehensiv	ve 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 SPECIFIY 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.