02.06 Visit Reference List

Location: Reports > Visits > 02.06 Visit Reference List

Overview

- Shows visit and supply charge details by patient, employee, program, or payer.
- Pulls from **Employee Activity > Visit Entry** and **Supplies > Supply Charges**.
- Useful for auditing visit times, disciplines, contract staff, and HHAeXchange/CareBridge submissions.

Data Source

- Verify visit assessments have been imported into charges.
- **Include Completed Assessments** will also pull completed (not-yet-imported) assessments.

How to Run

- **From / Thru:** Date range for visit and supply entries.
- **Program(s) / Payer(s) / Team(s) / Employee(s):** Filter by any combination; leave blank for all.
- **Skip PPS Payers / Skip PerDiems:** Exclude payers flagged as PPS or Per Diem.
- **Include Supply Charges:** Adds supply entries to the visit list.
- **1 Pg per Pt:** When printing by patient, adds a page break after each patient.

Charge / Employee Filters

- **No Charge Visits Only:** Only visit codes with *Chargeable = No* (visit status codes). Not used with "Include Supply Charges".
- **Exclude No Charge Visits:** Hides any entry with a zero charge amount.
- **Exclude Contract Employees:** Excludes employees whose Vendor # starts with **.
  - Codes > Other Basic Codes > Employees > Vendor No
- **Contract Employees Only:** Shows only employees whose Vendor # starts with **.
- **Contract Vendor #:** Limit contract results to a specific vendor number (optional).
- **Use the Dates These Charges Were Keyed:** Filters by the date the charge was entered, instead of service date.
  - When unchecked, the report uses the **From** and **Thru** date at the top of report screen.
  - Added charges only:
    - **Checked**: Includes only visits that were newly added during the keyed date range.
    - **Unchecked**: Includes visits that were modified during the keyed date range.
- **SN / PT / OT / ST / SW / HHA:** Restrict to selected disciplines only or leave all unchecked to select all.
- **MemoCode = X:** Used to identify visits transmitted to HHAeXchange and CareBridge (excludes visits not sent).

How to Read

- **Date:** Visit or supply service date.
- **Time In / Time Out:** Start and end time of the visit. When supplies are included, this column may show the supply description instead of times.
- **Employee:** Staff assigned on the visit entry.

- **Pg / Pay / Job / Vst / Reve / Tm:** Program, payer, job code, visit/supply code, revenue code, and team.
- **Hours:** Visit duration in hours, or quantity for supply codes.
- **$Amount:** Visit = *Hours* × *job code rate* Supply = *Quantity* × *price*

Subtotals appear by patient or employee (depending on sort), with a grand total at the end.

☐☐ **Related:**

- Import Visit Charges

Tip: If visit counts or dollars do not match other reports, rerun 02.06 with narrower filters (one program, one discipline, or one employee) to pinpoint the issue.

Knowledgebase
http://kb.barnestorm.biz/KnowledgebaseArticle50564.aspx