

NextStep Clinical

Billing Services Dynamic Report

Last Modified on 12/29/2025 11:43 am EST

Path: Main Menu > Reports Menu > Administrative Reports > Billing and Productivity section > Billing Services Dynamic

About

The Billing Services Dynamic Report generates a list of Services from Forms, Notes, and Census Billing within NextStep Clinical. This report allows you to easily see whether the Note has been finalized or is still in draft, as well as if the Service was sent to the NextStep Billing or not.

User Permission: Only users with the **Administrative Reports** permission can access this report.

In this article:

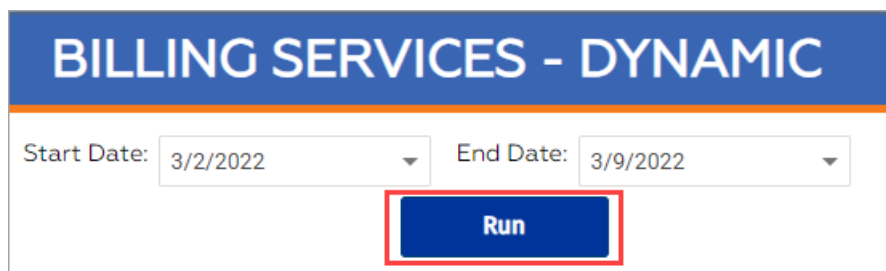
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Run the Billing Services Dynamic Report

1. Navigate to the Billing Services Dynamic Report by following the path above.
2. Enter a **Start Date** and **End Date**.

Note: By default, the Start and End Date fields are populated with a week date range based on the End Date, which is the current date.

3. Click the **Run** button.



Report Functions

In the Billing Services Dynamic Report:




NEXTSTEP


Sort

1. Run the report.
2. Click on a column header to sort.

Filter

1. Click the **filter**  on a column.
2. In the **Enter text to filter** field, type to search, and then select the checkbox(es) to filter.

Column Chooser

1. Run the report.
2. Click the **Column Chooser**  **Column Chooser** button.
3. To remove a displayed column, drag the column header into the **Column Chooser** window. To have that column displayed, drag the column header from the Column Chooser window back to the report.

BILLING SERVICES - DYNAMIC

Start Date:2/1/2022

End Date:3/17/2022

Run

Column Chooser

Save Columns

Export to

Search Panel

ID	Patient ID	Patient Name	Case Number	Client Ref #	Provider Started By	Provider Billed Under	Npi
978327	1035113	Test, Bill	1035113-1		hgarrett1	hgarrett1	
978328	1035113	Test, Bill	1035113-1		NextStep Solutions	NextStep Solutions	1023
978329	1035046	Test, Bill	1035046-4		NextStep Solutions	NextStep Solutions	1023
978330	1035103	Test, Harper	1035103-1		NextStep Solutions	NextStep Solutions	1023

Reorder Columns

1. Run the report.
2. Click on a column header and drag it to the location you want to put it. When an up and down arrow is displayed, drop the column header.

BILLING SERVICES - DYNAMIC

Start Date: 2/3/2022 End Date: 3/17/2022

Run

Column Chooser Save Columns Export to Search Panel


ID	Patient ID	Patient Name	Case Number	Client Reference Number	Provider Started By	Provider Billed
978327	1035113	Test, Bill	1035113-1		hgarrett1	hgarrett1
978328	1035113	Test, Bill	1035113-1		NextStep Solutions	NextStep Solut
978329	1035046	Test, Bill	1035046-4		NextStep Solutions	NextStep Solut




NEXT STEPS

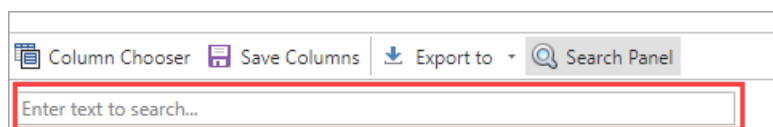
Save Columns

Allows you to save how the columns are displayed when you run the report. This is specific to the logged-in user.

1. Run the report.
2. Choose your columns following the steps above for using the Column Chooser and/or reorder your columns.
3. Click the **Save Columns**  **Save Columns** button.

Search

1. Run the report.
2. Click the **Search Panel**  **Search Panel** button.
3. In the **Enter text to search** field, type in your search term. Any text that matches what you've entered is displayed.



Export

1. Run the report.
2. Click the **Export to**  **Export to** button and select to export to CSV, XLS, or XLSX.

