Billing Services Dynamic Report

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> **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 and Notes 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 Billing Engine or not.

> 🔑 **User Permission**: Only users with the **Administrative Reports** permission can access this report.
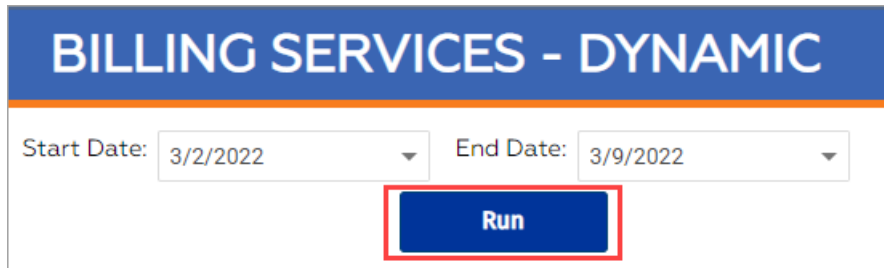
Run the Billing Services Dynamic Report

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:

Sort

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

Filter

1. Click the **filter** Patient ID 🔽 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.

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.

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** button and select to export to CSV, XLS, or XLSX.