



Helper Income Review Report

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What is the Income Review Report?

The Income Review Report is a useful report that allows you to view your income for a specific time period. This report is especially helpful when trying to determine your yearly income for tax purposes.

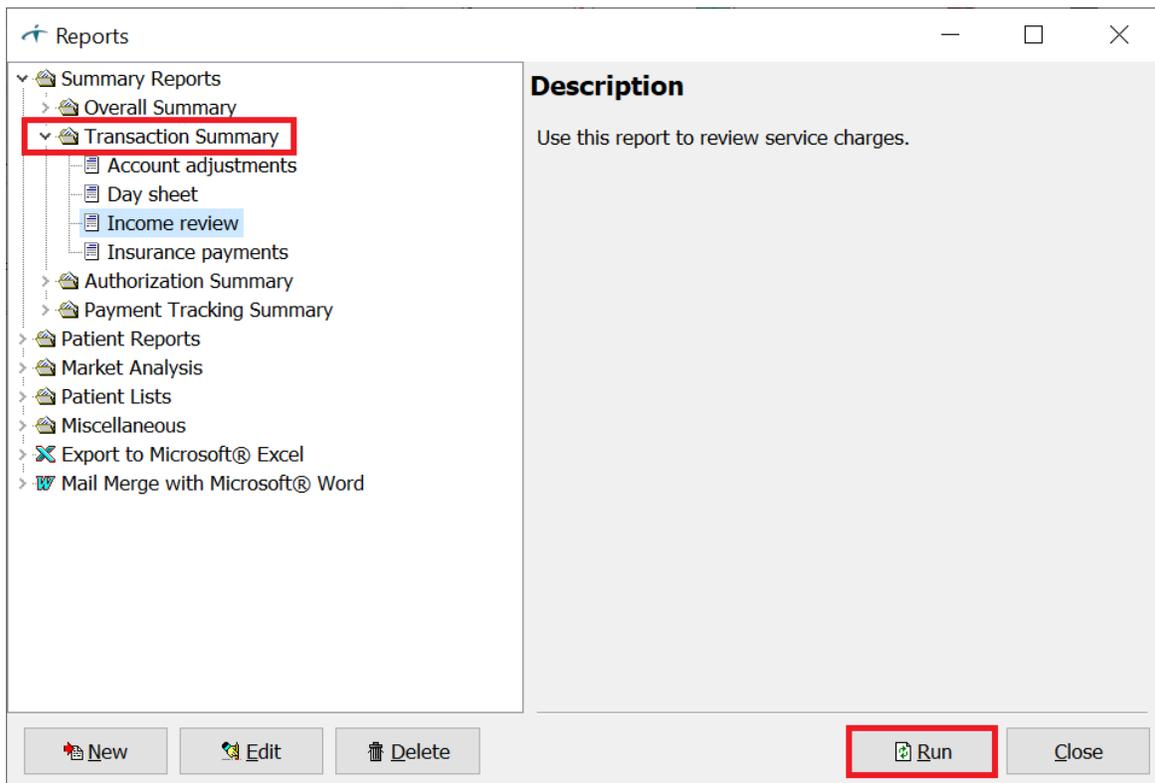
You can include any combination of the following options on the report:

- Sessions
- Payments
- Adjustments
- Interest Charges

Running the Income Review Report

To get to the report in Helper please do the following:

1. Above the patient list click on “Reports”
2. In the Reports Window expand out “Transaction Summary”
3. Click on “Income Review” then click “Run”.



4. Click on the “Report Layout” button. When you do you will see the following screen:

Transaction Summary Report: Layout

General Columns Description & Title Page Setup

Sub-total transactions by

- Therapist
- Program
- Account
- Insurance
- Facility
- Service
- Type of Transaction
- Month
- Week
- Day
- Do not sub-total

Start a new page for each group

Print today's date on report

Print date range on report

Font Sample Font...

Print these billing parties

- Patient & Responsible Parties
- Primary Insurance
- Secondary Insurance
- Inactive Insurance

Print these transaction types

- Sessions
- Payments
- Adjustments
- Interest charges

Print these rows

- One row for each transaction
- Separate Session charges by billable party
- Only print totals

Save Cancel

Please set up your report so it mimics the screenshot above.

This layout will give the total income you collected from all parties, subtotaled by the month. If you rather have each payment listed individually (instead of monthly totals) then choose the option of “One row for each transaction” under “Print These Rows”.

5. Click the “Columns” tab (to the right of the “General” tab). When you do you will see the following screen:

Transaction Summary Report: Layout

General Columns Description & Title Page Setup

Print these columns

<input checked="" type="checkbox"/> Date	<input type="checkbox"/> Therapist
<input checked="" type="checkbox"/> Description	<input type="checkbox"/> Session Status
<input type="checkbox"/> Patient name	<input type="checkbox"/> Method of payment
<input type="checkbox"/> Billable party name	<input type="checkbox"/> Adjustment category
<input type="checkbox"/> Session Charge	<input type="checkbox"/> Diagnosis
<input type="checkbox"/> Writeoff	<input type="checkbox"/> CPT code
<input type="checkbox"/> Tax	<input type="checkbox"/> Units
<input checked="" type="checkbox"/> Amount	<input type="checkbox"/> Check number
<input type="checkbox"/> Primary Insurance Expected Amount	

When printing insured billable party names

Print insured's name

Print insurance company name

Save Cancel

This is where you can choose the columns you wish to display on the report. For this report, we recommend to only use the columns chosen above if you are wanting to see total payments. Once you have selected your columns click “Save” to close out of the report layout.

6. Lastly enter the date range you want to use under “Select Transactions”. For example, if you are trying to determine your yearly income use a date range of 01/01/2021 to 01/01/2022 and then click “Preview”. This should generate the report showing the totals for each month and then a grand total at the end of the report (see example below).

Income review

January 1, 2021 to January 1, 2022

Aug, 2021

Date	Description	Amount
Sub Total		(\$13,557.50)

Sep, 2021

Date	Description	Amount
Sub Total		(\$12,816.38)
Grand Total		(\$129,178.92)

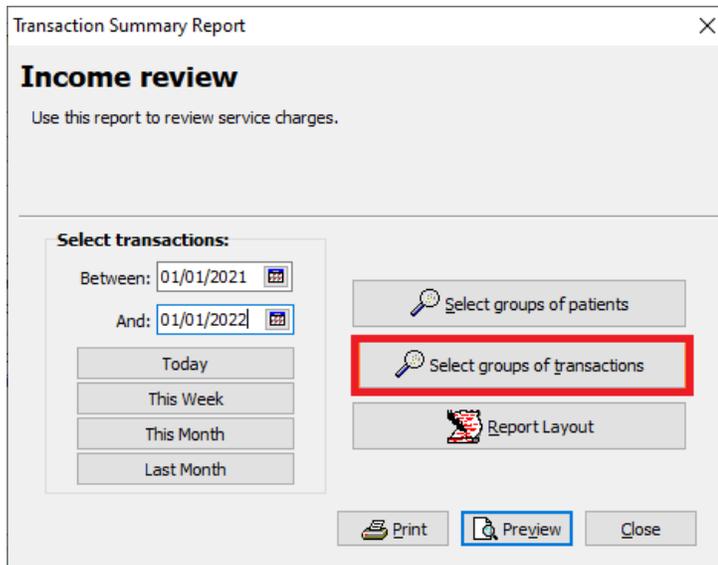
In this example we can see the totals for August & September followed by the grand total of income received for the year.

Again, if you want to see each payment listed individually then go back to Step 4 and update “Print These Rows” so “One row for each Transaction” is selected. The report will be much larger, but each payment will be individually listed in the report.

Running the Report for a Single Provider

If you have multiple providers in the practice and you want to run the report for just a single provider, you can do that by adding one additional step.

1. Go to the income Review window and click “Select Group of Transactions”



2. Click on the “General” tab and select your Therapist in the Therapist field and then click “OK”.

The screenshot shows a dialog box titled "Select Transactions" with three tabs: "Dates", "General", and "Sessions". The "General" tab is active and highlighted with a red box. Below the tabs, there are three sections for selection criteria:

- Select transactions with:** This section contains three dropdown menus: "Therapist:", "Program:", and "Account:". The "Therapist:" dropdown is highlighted with a red box.
- Select payments with:** This section contains a dropdown menu for "Method of payment:".
- Select adjustments with:** This section contains a dropdown menu for "Type of adjustment:".

To the right of these sections is a list of transaction types with checkboxes:

- Sessions
- Payments
- Adjustments
- Startup Balances
- Interest Calculations

At the bottom right of the dialog box, there are three buttons: "Clear" (with a refresh icon), "OK", and "Cancel". The "OK" button is highlighted with a red box.

3. Enter your date range and run the report. The income reported will be for the specific provider you selected.

Hopefully this document has proven useful for you. If you have any other questions/concerns, please do not hesitate to contact the Helper Support team at 800-343-5737 (option #1).