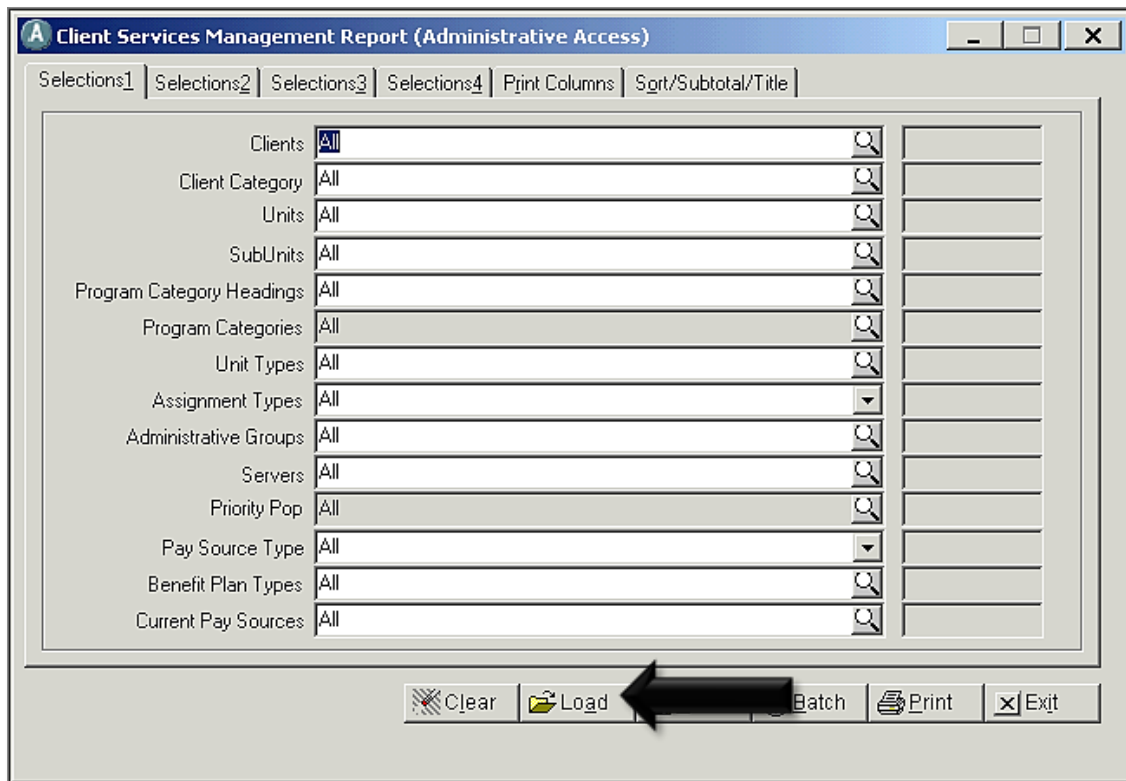# Client Management Payment Report

The "Client Management Payment Report" was designed to assist programs in identifying paid claims by determining the status of payments posted against services. This report has the following fields: Client Case #, Client Name, Unit ID, SubUnit ID, Form Number, Begin Date, Service Code, Current Pay Source, Current Benefit Plan, Server, Appointment Type, Place of Service, Units of Service, Payments, Adjustments, Extended Price, and Balance (if applicable). Additionally, please keep in mind this report may take considerable time to run depending on the reporting timeframe(s).
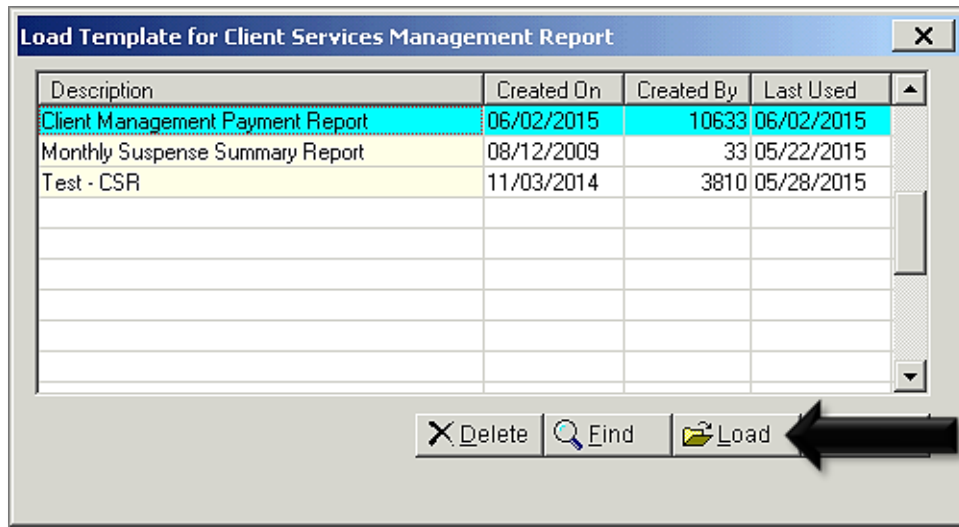
To Initiate The Report:

· Launch the following menus, "Client Services" -> "Client Services Reports Menu" -> "Client Services Management Report."

Loading the Template:

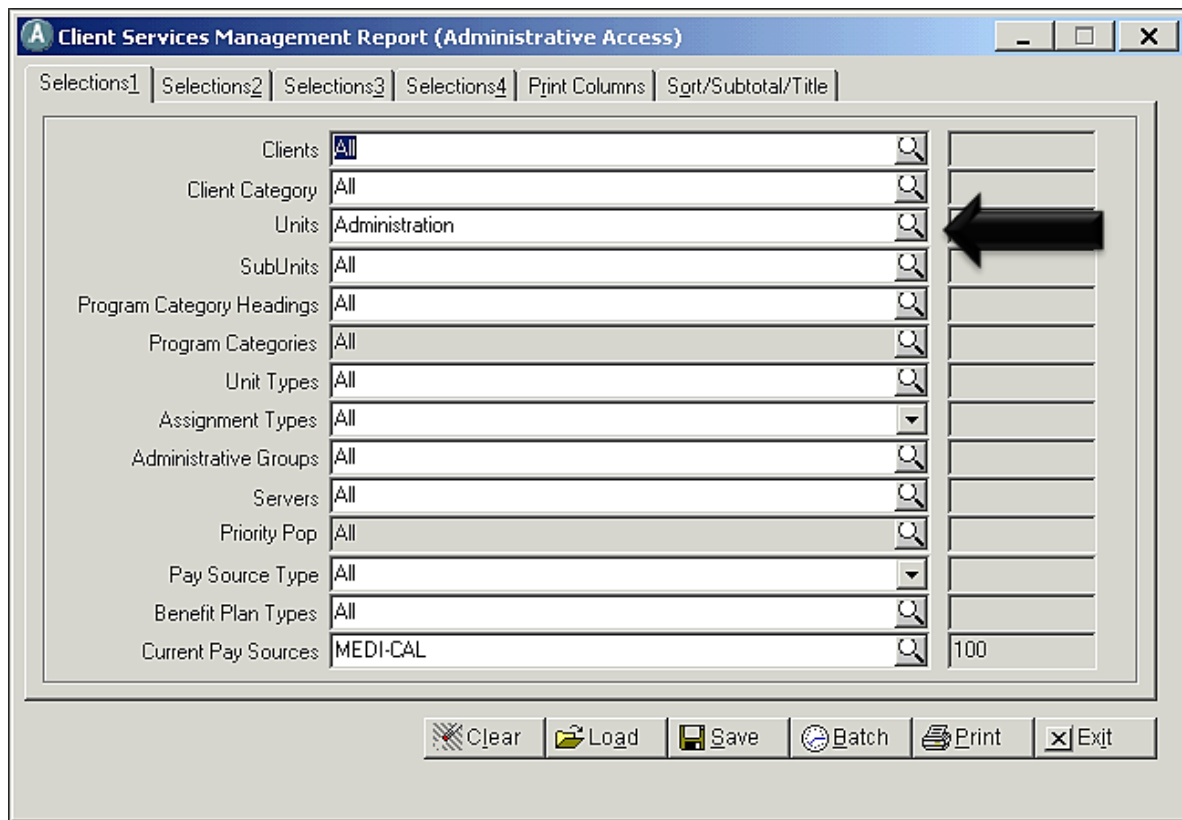· When the "Client Services Management Report" window launches, click on the "Load" icon (illustrated below).

- The template window will open, select "Client Management Payment Report" and click "Load" again.

Selection1 Tab:

- On the "Selection1" tab, enter the desired Unit(s), and or SubUnit(s).

Selection4 Tab

· Enter the desired "Service Dates" for reporting.
· Click the "Print" icon to run the report.