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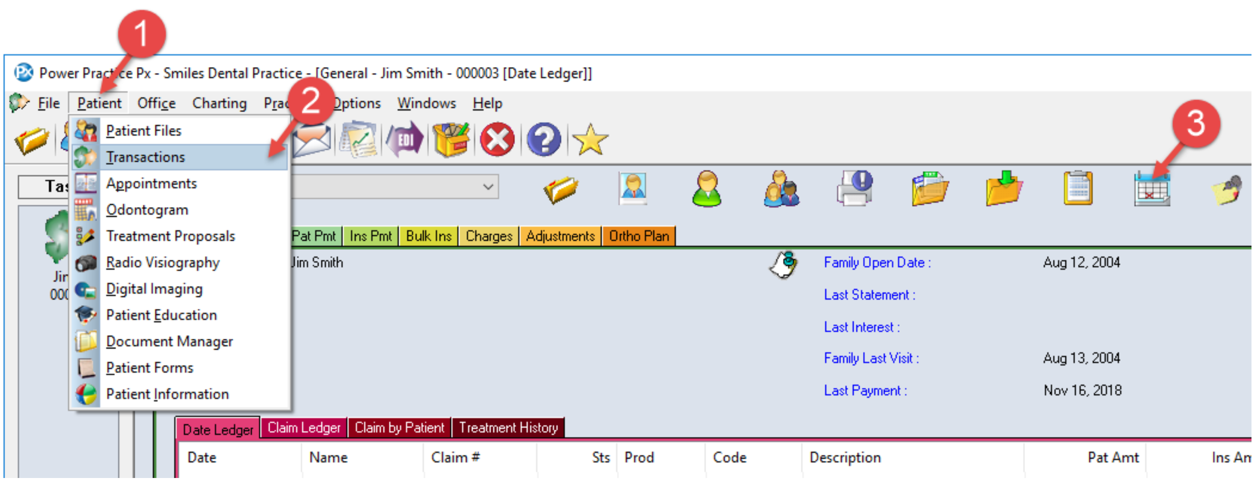
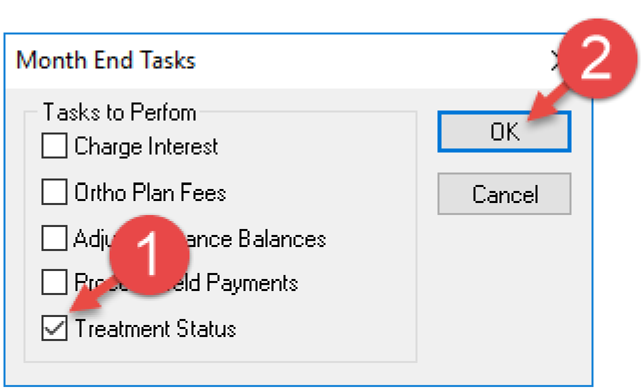
View a List of Incomplete and Planned Transactions

This document will guide you through retrieving a list of patients that have incomplete or planned transactions within a date range.

1. From the top menu bar, select the **Patient** menu.
2. Next select the **Transactions** menu item.
3. When the Transaction module opens, select the **Month End Task** (calendar) icon.



1. Select **Treatment Status** in the Month End Task window that pops up.
2. Select the **OK** button.



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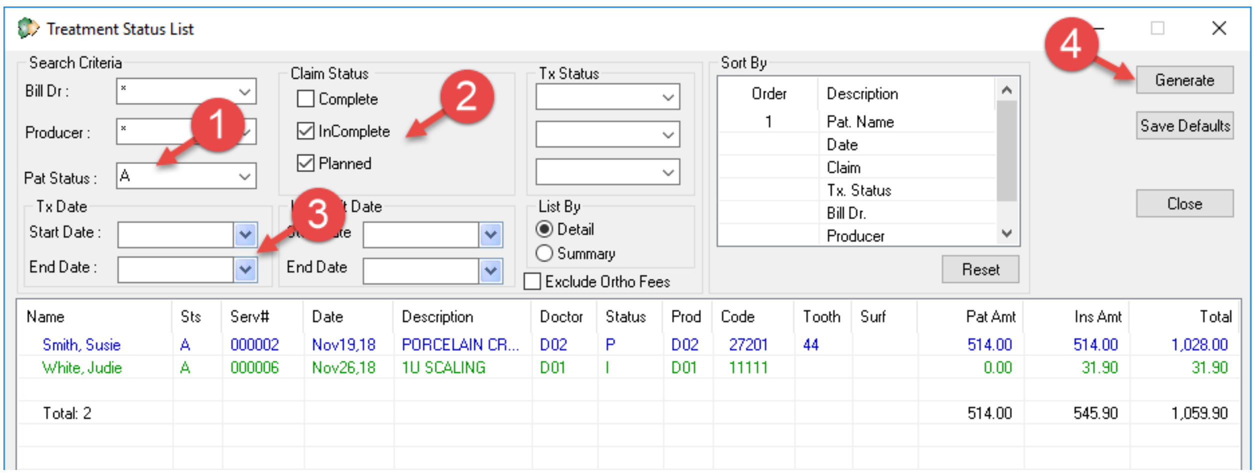
Note: A new window will open that can be dragged to a different monitor for easier use.

1. Set the **Patient Status** field to **A** (active).
2. Select the **Claim Status** you want to filter by.
3. Set the **Transaction Date** range to filter by (optional).
4. Select the **Generate** button.



The grid will list all patients and treatments that meet your filtering parameters. If you'd like to see further details on a patient or retrieve their profile to call and book an appointment, you can click them once to highlight that row, then click on the **Select Patient** button at the bottom.

This is where moving the **Treatment Status List** to another monitor becomes useful when working between the 2 windows.