

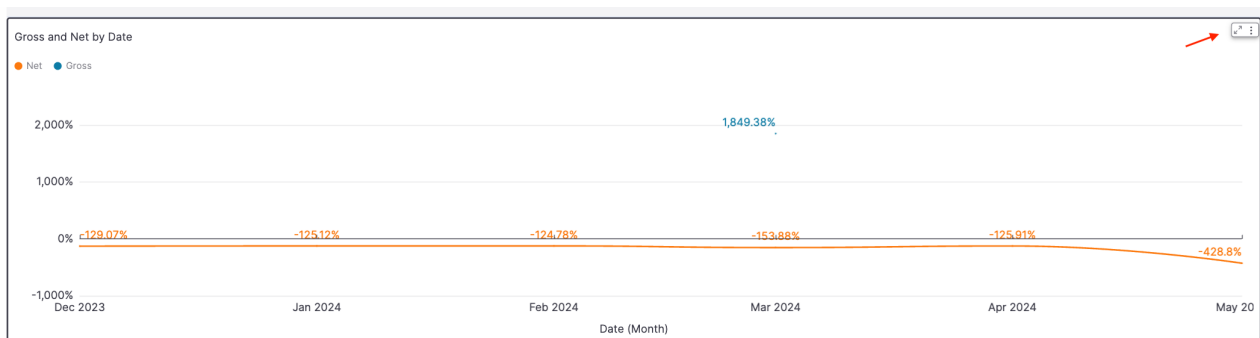
Collections Analysis: Summary Tab

Last modified on 11/12/2024 1:42 pm EST

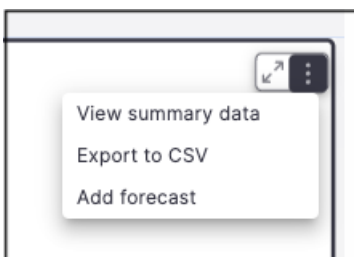
The Collections Analysis Report displays practice collections by date or date range, provider, office, or claim type.

The screenshot shows the 'Collections Analysis' interface with the 'Summary' tab selected. Below the tabs is a 'Controls' section with four dropdown menus: 'Date' (empty), 'Provider' (set to 'All'), 'Office' (set to 'All'), and 'Claim Type' (set to 'All').

Once you select the report parameters, a graph will generate that will show Gross and Net figures. The graph can be expanded/maximized by clicking on the arrow icon in the top right corner.



The three horizontal dots will allow the user to view summary data, export the file to CSV, or add a financial forecast.



Below the graph, a table will show an overview of the financials including, Month/Date, Total Charges, Insurance Payments, Patient Payments, Contractual Adjustment, Other Adjustment, Gross percentage and Net percentage.

Date	Charges	Insurance Payments	Patient Payments	Contractual Adj.	Other Adj.	Gross	Net
Nov 2024	\$0.00	\$2,936.48	\$0.00	\$0.00	\$0.00		
Oct 2024	\$0.00	\$17,926.09	\$0.00	\$0.00	\$0.00		
Sep 2024	\$0.00	\$15,966.34	\$0.00	\$0.00	\$0.00		
Aug 2024	\$0.00	\$16,199.42	\$0.00	\$0.00	\$0.00		
Jul 2024	\$0.00	\$9,674.85	\$0.00	\$0.00	\$0.00		
Jun 2024	\$0.00	\$16,142.70	\$0.00	\$0.00	\$0.00		
May 2024	\$0.00	\$5,827.31	\$0.00	\$1,358.96	\$0.00		-428.8%
Apr 2024	\$0.00	\$23,001.18	\$0.00	\$18,266.81	\$0.00		-125.91%
Mar 2024	\$1,500.00	\$26,490.75	\$1,250.00	\$19,527.32	\$0.00	1,849.38%	-153.88%
Feb 2024	\$0.00	\$15,667.94	\$0.00	\$12,555.80	\$0.00		-124.78%

In the top right corner of the table, additional options are available. The report can be maximized, sorted by specified column, or exported to CSV or MS Excel.

