# Collections Analysis Report

Last modified on 11/06/2026 12:51 pm EST

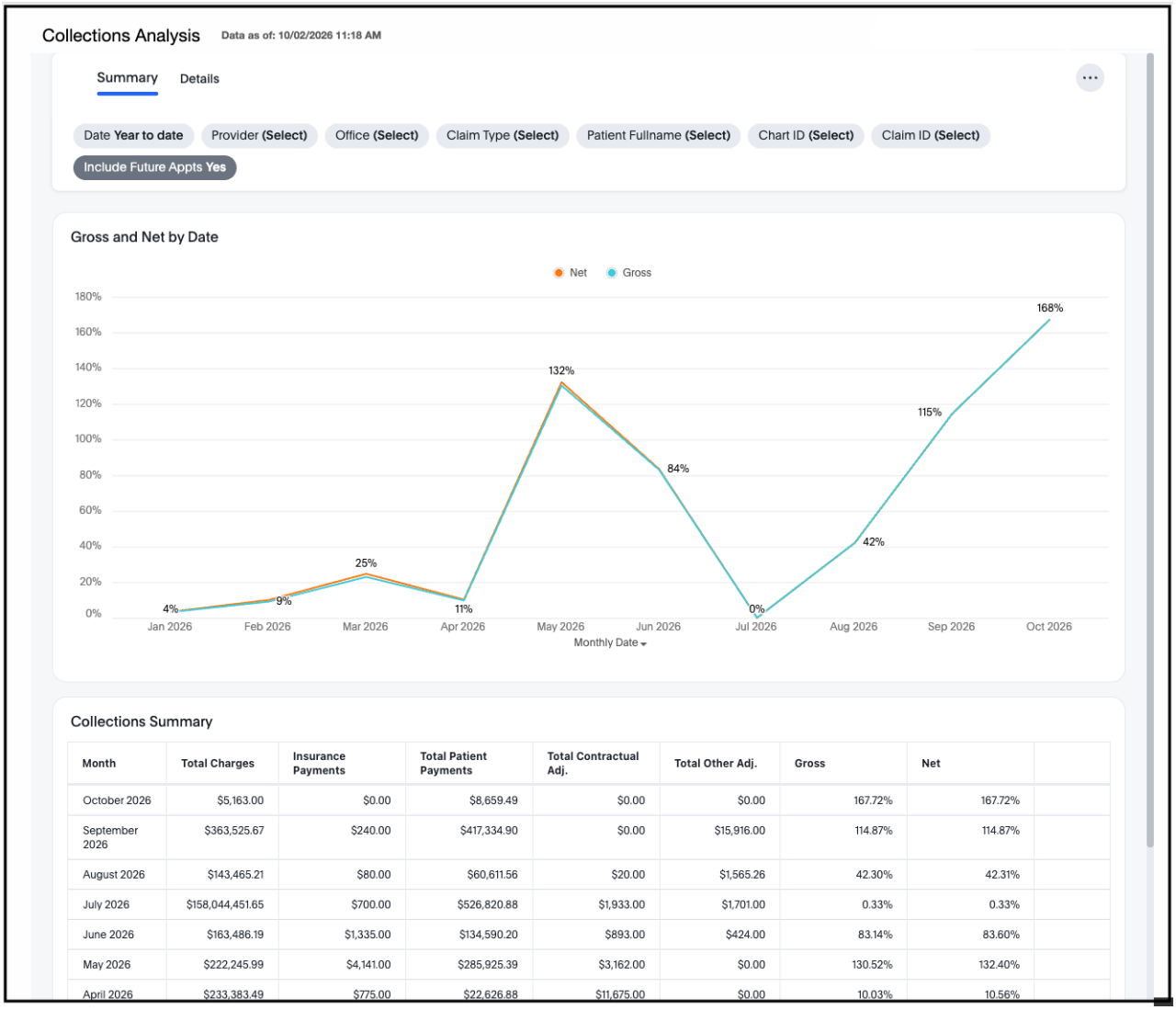
The Collections Analysis Report presents practice collections filtered by date or date range, provider, office, or claim type. After selecting your desired parameters, the report generates a graph displaying both gross and net figures.

Summary | Save View | Details | Video Walkthrough

## Summary

The summary tab allows you to select different report parameters, including:

- **Date** - select a single date or a date range
- **Provider** - select a single, multiple, or all providers
- **Office** - select a single, multiple, or all offices
- **Claim Type** - select professional or institutional, or both
- **Patient Full name** - select a single, multiple, or all patients
- **Chart ID** - select a single, multiple, or all Chart IDs
- **Claim ID** - select a single, multiple, or all Claim IDs
- **Include Future Appts** - select whether to include or exclude future appointments

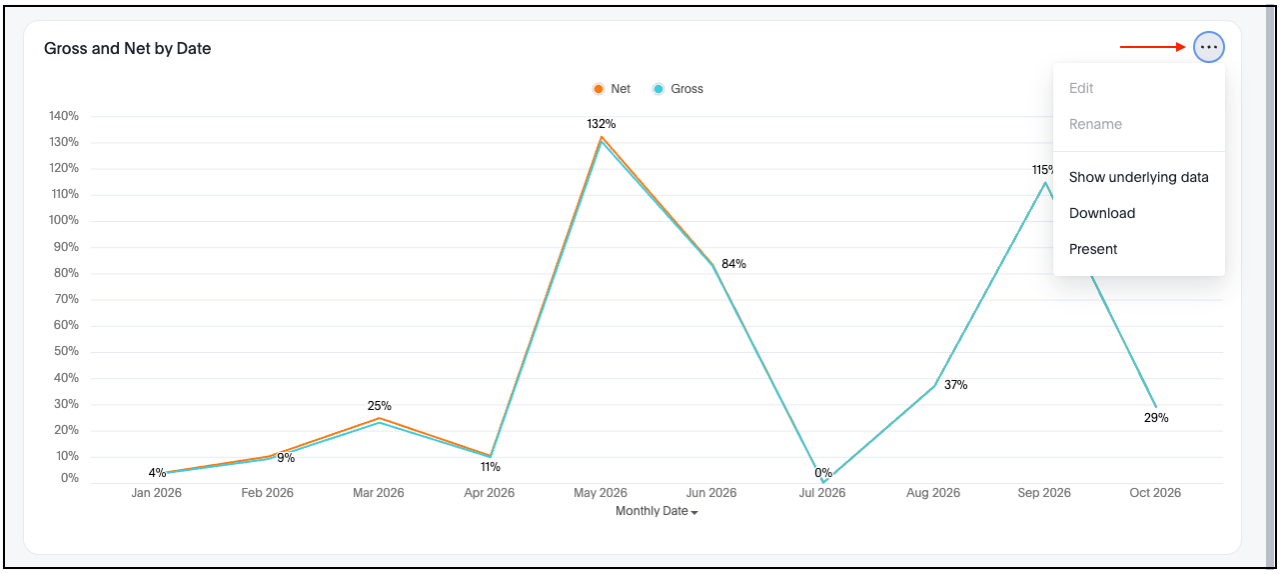



| Month | Total Charges | Insurance Payments | Total Patient Payments | Total Contractual Adj. | Total Other Adj. | Gross | Net |
|---|---|---|---|---|---|---|---|
| October 2026 | $5,163.00 | $0.00 | $8,659.49 | $0.00 | $0.00 | 167.72% | 167.72% |
| September 2026 | $363,525.67 | $240.00 | $417,334.90 | $0.00 | $15,916.00 | 114.87% | 114.87% |
| August 2026 | $143,465.21 | $80.00 | $60,611.56 | $20.00 | $1,565.26 | 42.30% | 42.31% |
| July 2026 | $158,044,451.65 | $700.00 | $526,820.88 | $1,933.00 | $1,701.00 | 0.33% | 0.33% |
| June 2026 | $163,486.19 | $1,335.00 | $134,590.20 | $893.00 | $424.00 | 83.14% | 83.60% |
| May 2026 | $222,245.99 | $4,141.00 | $285,925.39 | $3,162.00 | $0.00 | 130.52% | 132.40% |
| April 2026 | $233,383.49 | $775.00 | $22,626.88 | $11,675.00 | $0.00 | 10.03% | 10.56% |

Pressing on the three horizontal dots on the top right of the top tile will expose options to schedule the report to run on a preset cadence and display the information in presentation mode.




Pressing on the three horizontal dots on the top right of the Gross and Net by Date/Graph tile will expose options to show the underlying data, download the information, and display in presentation mode.




Below the graph, a table provides a financial overview that includes the month or date, total charges, insurance payments, patient payments, contractual adjustments, other adjustments, as well as gross and net percentages.

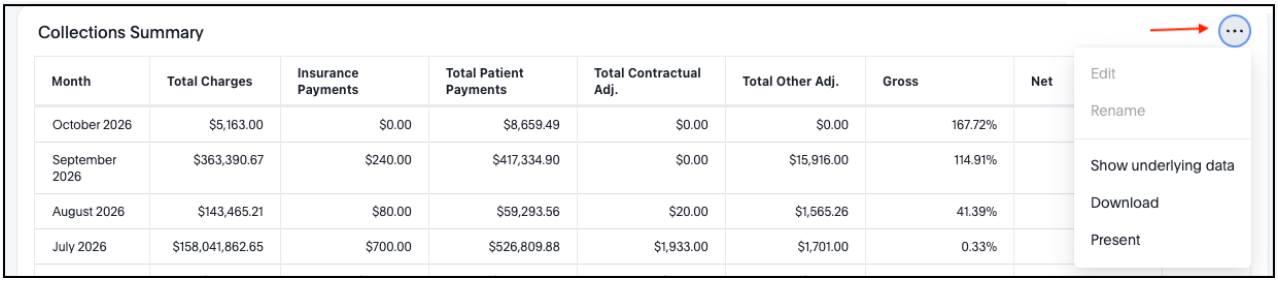


Collections Summary

| Month | Total Charges | Insurance Payments | Total Patient Payments | Total Contractual Adj. | Total Other Adj. | Gross | Net |
|---|---|---|---|---|---|---|---|
| October 2026 | $5,163.00 | $0.00 | $8,659.49 | $0.00 | $0.00 | 167.72% | 167.72% |
| September 2026 | $363,390.67 | $240.00 | $417,334.90 | $0.00 | $15,916.00 | 114.91% | 114.91% |
| August 2026 | $143,465.21 | $80.00 | $59,293.56 | $20.00 | $1,565.26 | 41.39% | 41.39% |
| July 2026 | $158,041,862.65 | $700.00 | $526,809.88 | $1,933.00 | $1,701.00 | 0.33% | 0.33% |
| June 2026 | $161,312.19 | $1,335.00 | $134,582.20 | $893.00 | $424.00 | 84.26% | 84.73% |
| May 2026 | $222,166.99 | $4,141.00 | $285,925.39 | $3,162.00 | $0.00 | 130.56% | 132.45% |
| April 2026 | $232,946.49 | $775.00 | $21,924.88 | $11,675.00 | $0.00 | 9.74% | 10.26% |
| March 2026 | $277,094.96 | $10,550.00 | $53,815.75 | $19,387.00 | $505.00 | 23.23% | 24.98% |
| February 2026 | $323,111.92 | $398.00 | $29,876.49 | $29,617.00 | $280.00 | 9.37% | 10.32% |
| January 2026 | $339,314.49 | $4,135.00 | $8,040.25 | $14,311.00 | $247.00 | 3.59% | 3.75% |

Showing 10 of 10 rows

Pressing the three horizontal dots in the top right corner of the Collections Summary tile will expose options to view underlying data, download the report, and view in presentation mode.



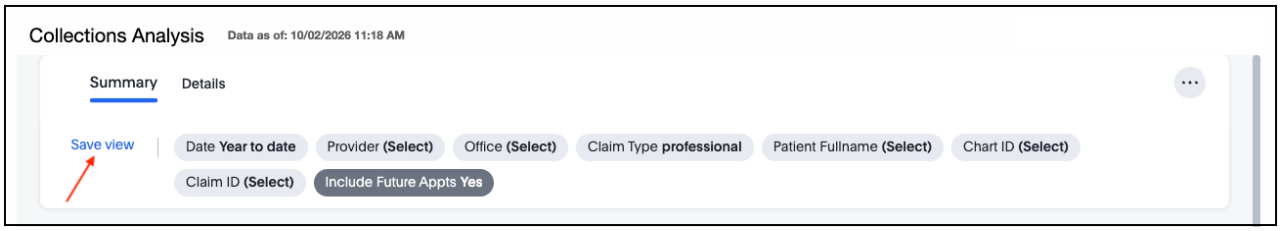
Collections Summary

| Month | Total Charges | Insurance Payments | Total Patient Payments | Total Contractual Adj. | Total Other Adj. | Gross | Net |
|---|---|---|---|---|---|---|---|
| October 2026 | $5,163.00 | $0.00 | $8,659.49 | $0.00 | $0.00 | 167.72% | |
| September 2026 | $363,390.67 | $240.00 | $417,334.90 | $0.00 | $15,916.00 | 114.91% | |
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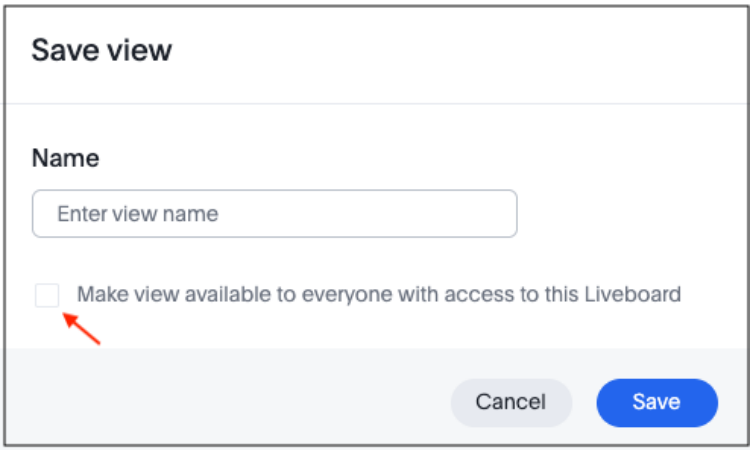
Edit
Rename
Show underlying data
Download
Present

## Save View

To save the filters set, press **Save View** on the left side of the screen.

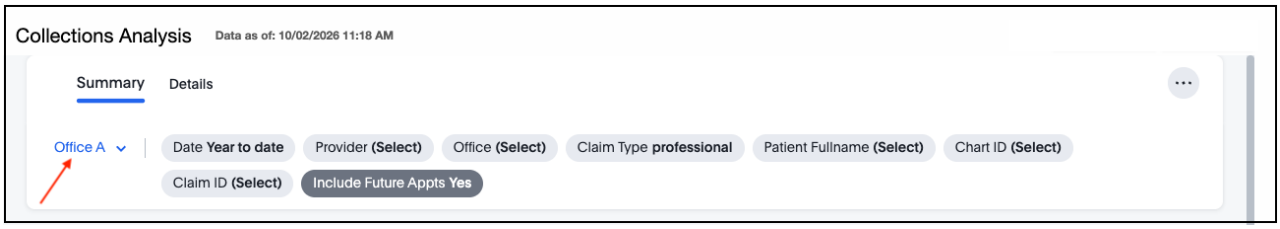



Enter a name for the view when prompted. To share the view with colleagues, check the box next to **Make view available to everyone with access to this Liveboard**.




Saved views preserve all filter selections, including date type and grouping. They do not save a specific date range.

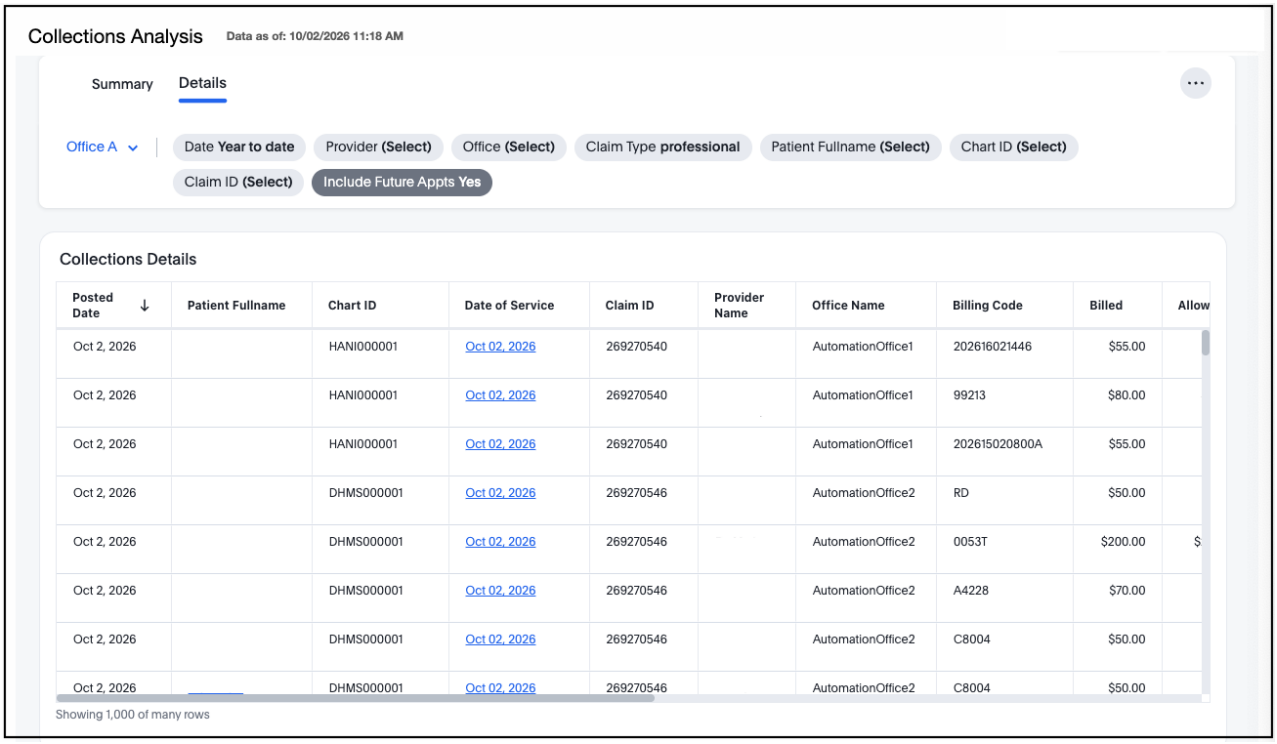
To rerun the report, select it from the left side of the screen. If it doesn't show, press the down arrow to view additional saved views.



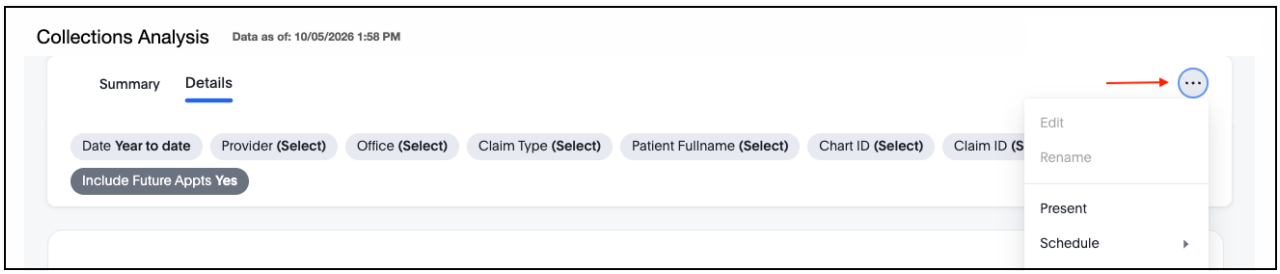

## Details

The Details tab provides a complete view of all appointment and patient details that match the parameters you have selected. This tab offers a granular breakdown of the underlying data, giving you greater visibility into specific cases.

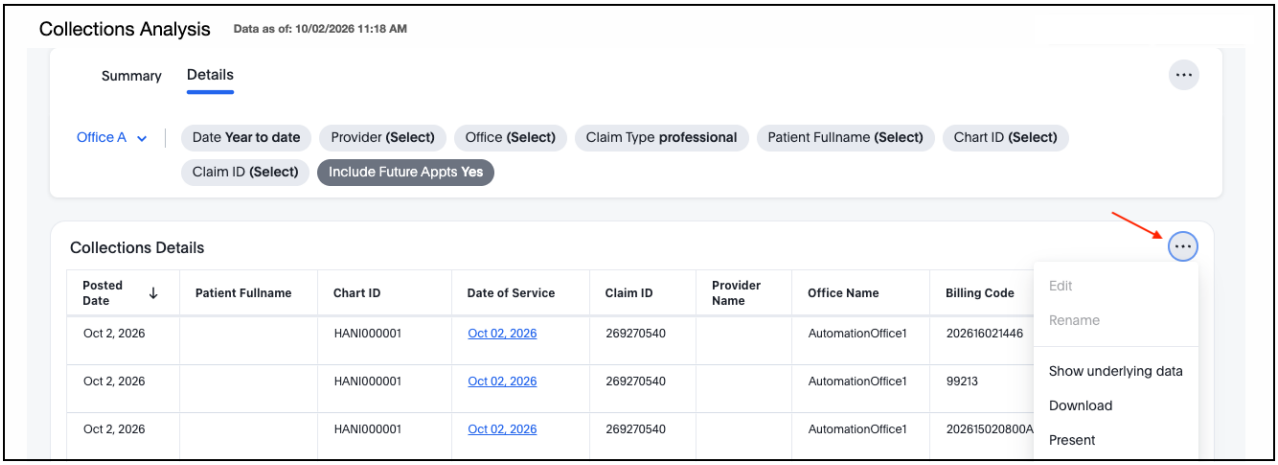
By reviewing this information, you can ensure accuracy, identify trends, and make more informed decisions about your billing and coding practices.




Pressing the three horizontal dots in the upper right corner of the top tile will expose options to schedule the report to run at a preset cadence and display the information in presentation mode.




Pressing the three horizontal dots in the upper right corner of the collections details tile will expose options to show the underlying data, download the report, and view in presentation mode.




# Video Walkthrough