

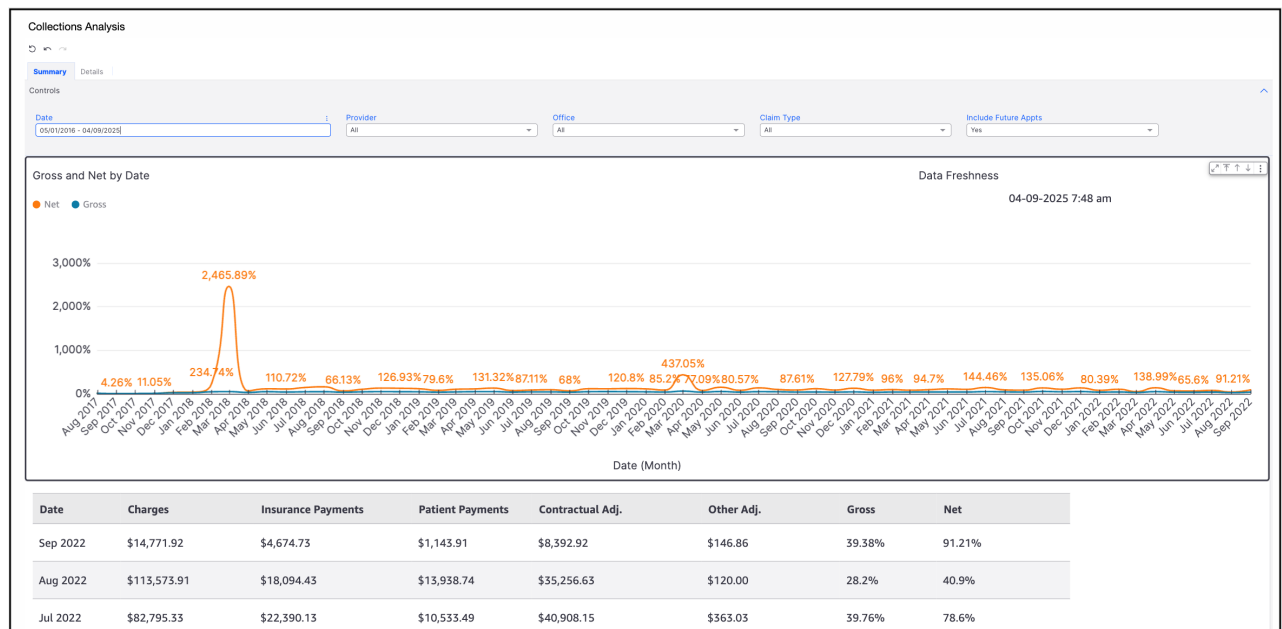
Collections Analysis Report

Last modified on 10/02/2025 4:07 pm EDT

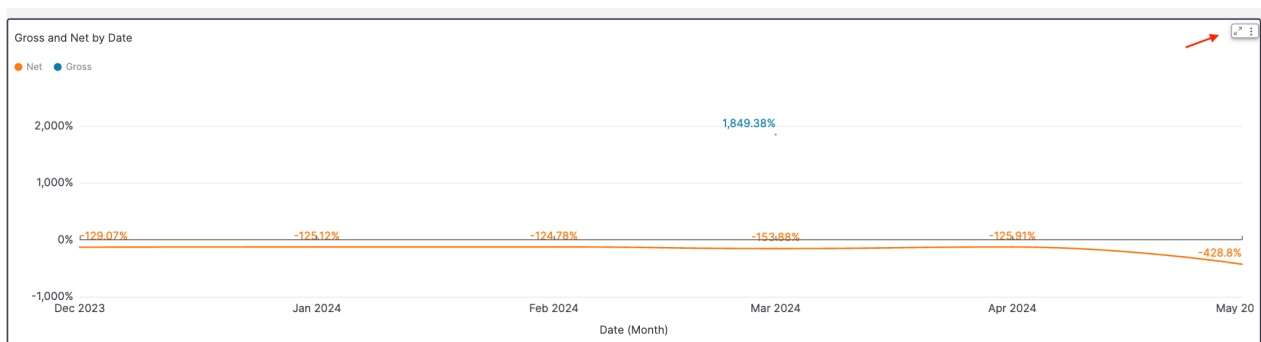
The Collections Analysis Report presents practice collections filtered by date or date range, provider, office, or claim type. After selecting your desired parameters, the report generates a graph displaying both gross and net figures.

[Summary](#) | [Details](#) | [Video Walkthrough](#)

Summary

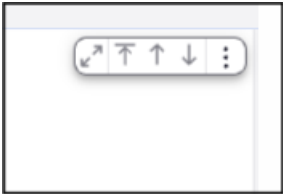


The graph can be expanded or maximized by clicking the arrow icon in the top-right corner.



The three horizontal dots provide options to view summary data, export the file to CSV, or add a financial forecast. Additional controls include maximizing the screen (horizontal arrows), drilling up to the top from a date (up arrow

with line), drilling up from a date (up arrow), and drilling down from a date (down arrow).



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.

| 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% |

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.

Code Analysis

Payer

Code

Details

Controls

Date Type

Date of Service

Date

03/01/2020 - 04/09/2025

Provider Name

All

Office Name

All

Billing Code

All

Primary Insurer Name

All

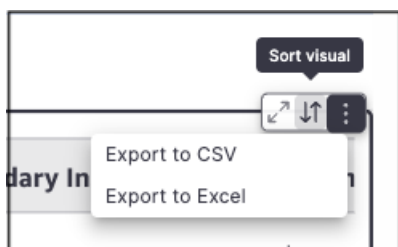
Include Future Appts

Yes

| Date of Service | Patient Fullname | Claim ID | Provider Name | Billing Code | Diagnoses | Billed | Adjustment | Allowed | Primary Insurer Name | Primary Insurer Paid | Secondary Insurer Name | Secor |
|-----------------|------------------|----------|---------------|--------------|-----------|----------|------------|----------|----------------------|----------------------|------------------------|--------|
| | | | | 99213 | | \$84.52 | \$29.20 | \$55.32 | FL BCBS | \$48.20 | | \$0.00 |
| | | | | 99213 | | \$88.92 | \$34.88 | \$54.04 | FL BCBS | \$42.01 | | \$0.00 |
| | | | | 99213 | | \$93.12 | \$34.70 | \$58.42 | FL BCBS | \$51.47 | | \$0.00 |
| | | | | 96413 | | \$246.04 | \$109.44 | \$136.60 | FL BCBS | \$116.59 | | \$0.00 |
| | | | | 85027 | | \$142.34 | \$51.91 | \$90.43 | FL BCBS | \$64.77 | | \$0.00 |
| | | | | G8553 | | \$99.94 | \$42.91 | \$57.03 | Cigna | \$46.72 | | \$0.00 |
| | | | | 80053 | | \$140.84 | \$67.56 | \$73.28 | Cigna | \$65.40 | | \$0.00 |
| | | | | 85027 | | \$127.71 | \$41.55 | \$86.16 | Cigna | \$72.87 | | \$0.00 |
| | | | | G8553 | 85027 | \$108.78 | \$50.02 | \$58.76 | Cigna | \$54.01 | | \$0.00 |

There are additional search options available to view the information provider, office name, billing code (CPT, HCPCS, and/or Custom Code), Primary Payer, Date Range, and Date Type. Each option will allow you to select one, multiple, or all in each category if you would like to narrow the information further.

Hovering in the top right corner of the report will open a menu that will allow you to maximize the screen (arrows pointing diagonally), sort the menu you see onscreen (vertical arrows), as well as export the report to CSV or MS Excel (three vertical dots).



Video Walkthrough