## **Collections Analysis: Summary Tab**

Last modified on 07/16/2025 9:33 am EDT

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

Collections Analy	sis								
560									
Summary Details									
Controls									^
Date 05/01/2016 - 04/09/20	25	i Provider		Office All	Claim Type		Include Future Appts Yes	*	
Gross and Net I	by Date						Data Freshness		[* ↑ ↓ ]:
Net Gross							04-09-2025	7:48 am	
3,000%	2,465.89	9%							
	Λ								
2,000%									
1.000%									
1,000%	234.74%				37.05%				
	26% 11.05%				2% 77.09%80.57% 87.61%	127.79% 96% 9			
2011201	201201201201201201201201	<sup>2</sup> 0		°20°20°20°20°20°20°20°20°20°20°20°20°20°	60, 202, 202, 202, 202, 202, 202, 202, 2	0202020220220220220	22222222222222222222	022022022022022022	52202202
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				Date (Mon	th)				
								-	
Date	Charges	Insurance Payments	Patient Payments	Contractual Adj.	Other Adj.	Gross	Net		
Sep 2022	\$14,771.92	\$4,674.73	\$1,143.91	\$8,392.92	\$146.86	39.38%	91.21%		
Aug 2022	\$113,573.91	\$18,094.43	\$13,938.74	\$35,256.63	\$120.00	28.2%	40.9%		
Jul 2022	\$82,795.33	\$22,390.13	\$10,533.49	\$40,908.15	\$363.03	39.76%	78.6%		

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.

Gross and Net by Date					J [2]
Net  Gross					
			1010 000		
2,000%			1,849.38%		
1,000%					
0%	-125.12%	-124,78%	-153:88%	-125,91%	-428.8%
					420.078
-1,000% Dec 2023	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 20
		Date (Month	n)		

The three horizontal dots will allow the user to view summary data, export the file to CSV, or add a financial forecast. There are also options to maximize the screen (horizontal arrows), drill up to top from date (up arrow with line), drill up from date (up arrow), and drill down from date (down arrow).



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%