

Collections Analysis: Details Tab

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The Details tab under the Collections Analysis Report will allow you to drill down into the details of your accounts receivable. It can group the information by month, year, provider, office, and claim type.

Collections Analysis

Summary

Details

Controls

Month AllYear AllProvider AllOffice AllClaim Type AllInclude Future Apples Yes

Collections Details

Posted Date	Patient Fullname	Chart ID	Date of Service	Claim ID	Billed	Allowed	Ins. 1 Paid	Ins. 2 Paid	Contractual Adj.	Other Adj.	Patient Paid	Insurance Name	Trace Number	Billing Code
Nov 15, 2019					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,138.16			
Jun 3, 2020					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,138.16			LABS
Jan 9, 2020					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$523.00			
Jan 25, 2021					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$470.00			
Apr 3, 2018					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$459.55			
Apr 5, 2022					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$387.02			
Apr 7, 2022					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$387.02			LABS
May 21, 2019					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$379.82			
May 9, 2018					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$331.70			
Apr 30, 2019					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$528.94			
Sep 25, 2018					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$320.00			99204
Jul 26, 2022					\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$311.19			

Information displayed include, Posted Date, Patient Full name, Chart ID, Date of Service, Claim ID, Provider Name, Office Name, Billed Amount, Allowed Amount, Ins 1 paid, Ins 2 paid, Contractual Adjustment, Other Adjustment, Patient Paid, Insurance Paid, Insurance Name, Trace Number, Billing Code (CPT/HCPCS), Adjustment Reason, Payment Method.

Collections Details

Posted Date	Patient Fullname	Chart ID	Date of Service	Claim ID	Provider Name	Office Name	Billed	Allowed	Ins. 1 Paid	Ins. 2 Paid	Contractual Adj.	Other Adj.	Patient Paid
Mar 18, 2024						D Inpatient Hospital	\$750.00	\$750.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Mar 18, 2024						D Inpatient Hospital	\$750.00	\$750.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

The information on the screen can be maximized (diagonal arrows), sorted by a selected column (vertical arrows), or exported to CSV or MS Excel (horizontal dots). This option will appear when hovering in the top right corner of the table.

