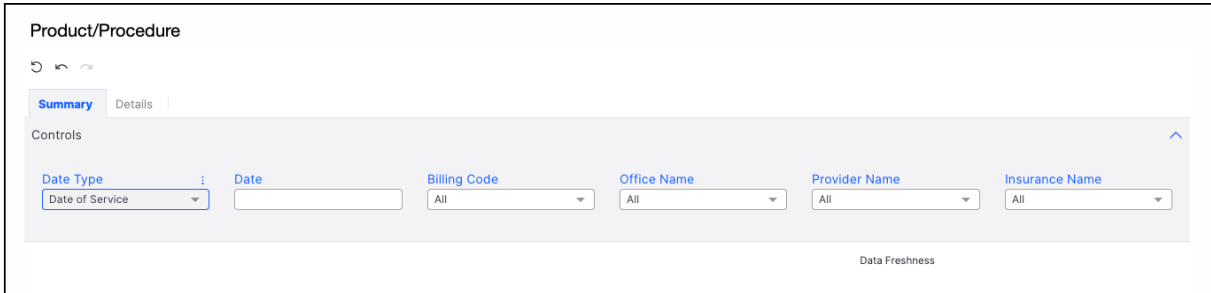


Product/Procedure Report: Summary Tab

Last modified on 04/03/2025 9:09 am EDT

The Product/Procedure Report will show you what CPT/HCPCS/Custom codes have been billed throughout your practice and detailed patient information if you need to dig deeper. Offices use this report to identify their office's most-used procedures and custom codes.

1. The Product/Procedure Report can be found by navigating to **Billing > Product/Procedure**.



The screenshot shows the 'Product/Procedure' report interface. At the top, there are navigation icons and tabs for 'Summary' (selected) and 'Details'. Below the tabs is a 'Controls' section with several input fields: 'Date Type' (a dropdown menu with 'Date of Service' selected), 'Date' (a text input field), 'Billing Code' (a dropdown menu with 'All' selected), 'Office Name' (a dropdown menu with 'All' selected), 'Provider Name' (a dropdown menu with 'All' selected), and 'Insurance Name' (a dropdown menu with 'All' selected). At the bottom right of the controls section, there is a 'Data Freshness' label.

2. There are several options available to run the report. They include:
 - a. **Date Type** - Date of Service or Procedure Posted Date
 - b. **Date** - Single Date or Date Range
 - c. **Billing Code** - Select a single, multiple, or all Billing Codes
 - d. **Office Name** - Select a single, multiple, or all offices associated with the account
 - e. **Provider Name** - Select a single, multiple, or all providers associated with the account
 - f. **Insurance Name** - Select a single, multiple, or all insurances associated with the account
3. The Data Freshness date/time stamp will appear on the right side of the report, just below the control drop-down menus.
4. The report will generate and include columns including Total Units Billed, Total Dollar Amount Billed, Charge per Item, Total Insurance Payments Received, Total Insurance Payments Received, Insurance Payment per Item, Total Patient Payments Received, Patient Payment per Item, Total Adjustments, and Adjustments per Item.

Product/Procedure

Summary Details

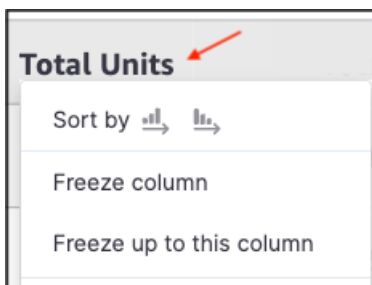
Controls

Date Type: Date of Service | Date: | Billing Code: All | Office Name: All | Provider Name: All | Insurance Name: All

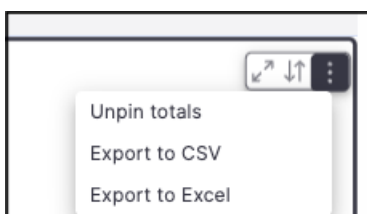
Data Freshness

Billing Code with Description	Total Units	Total	Charge per item	Total Ins. Payments	Ins. Payment per item	Total Patient Payment	Pt. paid per item	Total Adjustments	Adj. per item
Totals	2,966	\$274,286.04	\$92.48	\$147,284.58	\$49.66	\$0.00	\$0.00	\$108,678.57	\$36.64
00000:	17	\$1,701.29	\$100.08	\$919.29	\$54.08	\$0.00	\$0.00	\$577.69	\$33.98
36415: COLL VENOUS BLD ...	25	\$502.19	\$20.09	\$258.66	\$10.35	\$0.00	\$0.00	\$188.93	\$7.56
76881: US COMPL JOINT R-T W/IMG	34	\$8,614.63	\$253.37	\$4,605.09	\$135.44	\$0.00	\$0.00	\$3,162.68	\$93.02
80053: COMPREHEN METABOLIC PANEL	85	\$11,303.72	\$132.98	\$5,975.84	\$70.30	\$0.00	\$0.00	\$4,549.81	\$53.53
80076: HEPATIC FUNCTION PANEL	25	\$3,261.33	\$130.45	\$1,691.70	\$67.67	\$0.00	\$0.00	\$1,296.52	\$51.86
81003: URINALYSIS AUTO W/O SCOPE	36	\$1,058.00	\$29.39	\$557.45	\$15.48	\$0.00	\$0.00	\$414.52	\$11.51
85027: COMPLETE CBC AUTOMATED	46	\$6,129.79	\$133.26	\$3,300.14	\$71.74	\$0.00	\$0.00	\$2,423.81	\$52.69
86480: TB TEST CELL IMMUN MEASURE	25	\$3,292.15	\$131.69	\$1,768.47	\$70.74	\$0.00	\$0.00	\$1,224.29	\$48.97
96365: THER/PROPH/DIAG IV INF INIT	39	\$6,046.13	\$155.03	\$3,218.04	\$82.51	\$0.00	\$0.00	\$2,383.46	\$61.11
96413: CHEMO IV INFUSION 1 HR	46	\$11,242.93	\$244.41	\$6,112.26	\$132.88	\$0.00	\$0.00	\$4,608.12	\$100.18
96415: CHEMO IV INFUSION ADDL HR	50	\$3,636.70	\$72.73	\$1,965.81	\$39.32	\$0.00	\$0.00	\$1,457.29	\$29.15
99213: OFFICE O/P EST LOW 20 MIN	112	\$9,970.09	\$89.02	\$5,331.00	\$47.60	\$0.00	\$0.00	\$3,992.35	\$35.65
99214: OFFICE O/P EST MOD 30 MIN	57	\$7,739.66	\$135.78	\$4,133.47	\$72.52	\$0.00	\$0.00	\$3,102.57	\$54.43
99245: OFF/OP CONSLTJ NEW/EST HI 55	17	\$7,353.80	\$432.58	\$3,951.27	\$232.43	\$0.00	\$0.00	\$2,849.00	\$167.59

- Beginning with the second column from the left, Total Units, there are options to Sort by ascending or descending, freeze the column, or freeze up to this column. The options will become visible by pressing on the column header.



- Options to maximize the screen (diagonal arrows), sort the visual report (vertical arrows), and export the report (vertical dots) are displayed when the cursor hovers on the top right corner of the report.



- To quickly see detailed information for a particular code, press on the row containing the code. The option **Go to Details** will appear. Pressing on the option will display detailed information for that specific code.

Billing Code with Description

Totals

00000:

36415: COLL VENOUS BLD ...

[Go to Details](#)



76881: US COMPL JOINT R-T W/IMG