Billing Analysis

Last Modified on 08/10/2021 12:40 pm EDT

Version 14.19

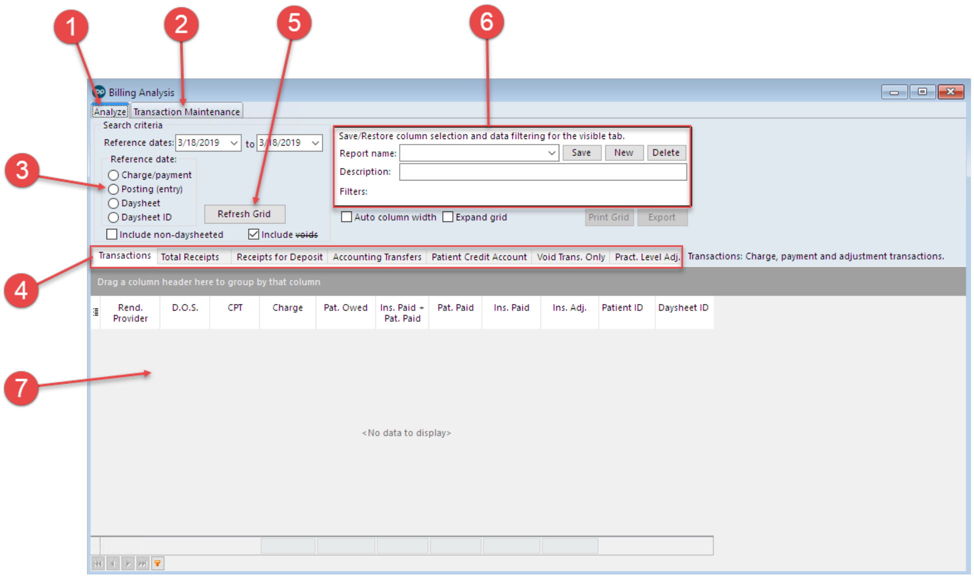
*This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.*

About Billing Analysis

> **Path: Billing tab > Transactions button > Transaction Analysis**

The Billing Analysis window creates a detailed financial report for your office based on set parameters. Each transaction has its own entry in the Analysis. For example, a 99213 may have three entries:

- The 99213 charge
- A patient's copay
- The insurance's payment



Billing Analysis Map

Number	Section	Description
1	Analyze tab	The Analyze tab shows transactions for particular categories based on set search criteria. It creates a financial report with each transaction having its own entry.
2	Transaction Maintenance tab	The Transaction Maintenance tab shows transactions where the logged-in user is either the Rendering, Billing, Supervising, or Service Provider. Transactions can be updated with the name of the rendering provider of the charge that was paid in this tab.
		Search criteria settings narrow search results by selecting a reference date option based on selected reference dates. Reference date report options

3	Search Criteria settings	include: • **Charge/payment**: This report pulls based on the charge date (usually the date of service) and payments and adjustments according to their payment date (which can be backdated at the time of posting). • **Posting (entry)**: This report accesses charges, payments, and transactions that have a posting date within the time frame selected. **Note**: This date is time-stamped from the local computer where the user is posting payments and does not take into consideration the date of service for charges or any backdating done when posting payments. • **Daysheet**, and **Daysheet ID**: This report accesses charges, payments, and adjustments according to the date or ID that they were processed on a daysheet.
4	Analysis Grid Categories	The Analyze tab may list the following search result grid categories: • **Transactions**: Shows the charges, payments, and adjustment transactions. • **Total Receipts**: Shows payment transactions plus patient credits (includes voids). • **Receipts for Deposit**: Focuses on new money payment transactions and patient credits. • **Accounting Transfers**: Focuses on the patient credit account. Uses posted date or Daysheet ID. • **Patient Credit Account**: Focuses on credits for the patient's account. • **Void Transf**. **Only**: Focuses on voids in the daysheet. • **Practice Level Adjustment**: Focuses on Practice level insurance adjustments.
5	Refresh Grid	Refresh grid refreshes and populates the grid with the latest report information based on the set analysis criteria.
6	Search Report Template	The Search Report Template creates, saves, and deletes the analysis criteria for a report.
7	Grid	The grid displays the search results based on the set search criteria.

Best Practice Suggestions for Financial Reporting

Use the posting (entry) date as the Reference date.

- Avoid backdating.
- Run a daysheet daily- Running daysheets daily protects the integrity of every practice's financial data from human error and deliberate adjustment.
- Regularly monitor financial and productivity reports.

Version 14.10

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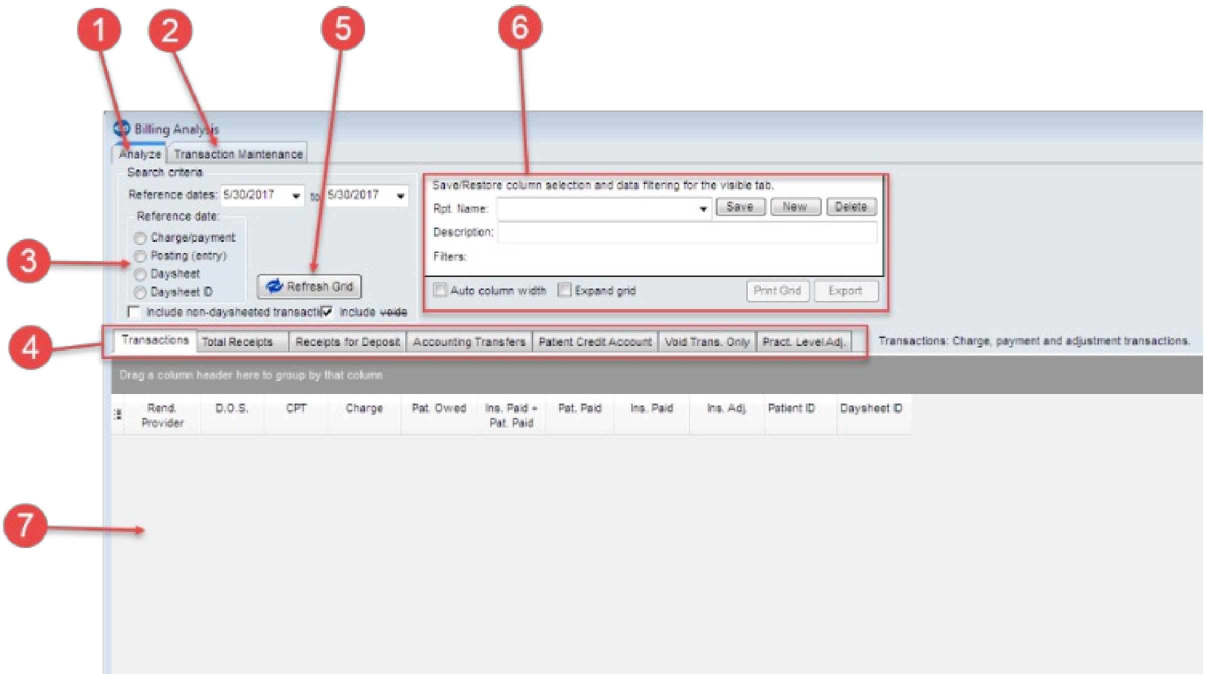

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