

Practice Analytics / Billing Reports Comparison

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About

This article will go over a comparison of the new Practice Analytics reports with the Billing Reports, including changes, key elements, and updates.

Comparison Table



Tip: Java must be enabled in order to use the search and sort capability. To quickly find the form you want in this table:

- **Filter:** Enter specific keywords (or a character string) in the filter bar. As you enter characters in the filter bar, the rows not containing those characters will become hidden. The visible rows display based upon the characters in the row that match the characters in the filter bar. The more characters you enter, the more the table will be filtered. Please only use keywords and correct spelling. You can use letters and numbers. **Do not use commas to separate keywords.**
- **Sort:** You can sort A - Z and Z - A by clicking on a column header.

Show entries

Filter:

Report Name	Purpose of Report	New Reports Logic	Previous Reports Logic
A/R Aging Analysis - Insurance Payer - Insurance A/R	Use this report to displays all outstanding insurance balances due from the payer.	Daily Snap Shots: True end of day snapshot that occurs after hours. Therefore the Summary Totals no longer depend on daysheet date and are more real-time. Payments or charges entered after daysheeting will be accounted for because we take a snapshot overnight. The Patient Details will be a day behind.	Summary Totals are based on the last daysheet date. Any transactions that occur after daysheeted are not accounted for. The Patient Details are real-time/independent of when you daysheeted. Today you can see the details don't always add up to the summary total because transactions have occurred after daysheeting.
A/R Aging Analysis - Insurance Payer - Patient A/R	Use this report to display displays the practice's Patient Accounts Receivable by Insurance Payer.	Daily Snap Shots: True end of day snapshot that occurs after hours. Therefore the Summary Totals no longer depend on daysheet date and are more real-time. Payments or charges entered after daysheeting will be accounted for because we take a snapshot overnight. The Patient Details will be a day behind.	Summary Totals are based on the last daysheet date. Any transactions that occur after daysheeted are not accounted for. The Patient Details are real-time/independent of when you daysheeted. Today you can see the details don't always add up to the summary total because transactions have occurred after daysheeting.

Report Name	Purpose of Report	New Reports Logic	Previous Reports Logic
A/R Aging Analysis - Insurance Payer - Patient Responsibility Date A/R	Use this report to displays Accounts Receivable for dates when a patient became responsible for a balance.	Daily Snap Shots: True end of day snapshot that occurs after hours. Therefore the Summary Totals no longer depend on daysheet date and are more real-time. Payments or charges entered after daysheeting will be accounted for because we take a snapshot overnight. The Patient Details will be a day behind.	Summary Totals are based on the last daysheet date. Any transactions that occur after daysheeted are not accounted for. The Patient Details are real-time/independent of when you daysheeted. Today you can see the details don't always add up to the summary total because transactions have occurred after daysheeting.
A/R Aging Analysis - Insurance Payer - Secondary Responsibility Date A/R	Use this report to displays all outstanding A/R is for when the Secondary Insurance Payer became responsible for a balance due. See patient A/R balances for when a secondary payer became responsible for balances rather than just view the age of the claim.	Daily Snap Shots: True end of day snapshot that occurs after hours. Therefore the Summary Totals no longer depend on daysheet date and are more real-time. Payments or charges entered after daysheeting will be accounted for because we take a snapshot overnight. The Patient Details will be a day behind.	Summary Totals are based on the last daysheet date. Any transactions that occur after daysheeted are not accounted for. The Patient Details are real-time/independent of when you daysheeted. Today you can see the details don't always add up to the summary total because transactions have occurred after daysheeting.
A/R Aging Analysis - Insurance Payer - Total A/R	Use this report to displays all outstanding Accounts Receivable by aging bucket and by Insurance and Patient Totals/Insurance Balances.	Daily Snap Shots: True end of day snapshot that occurs after hours. Therefore the Summary Totals no longer depend on daysheet date and are more real-time. Payments or charges entered after daysheeting will be accounted for because we take a snapshot overnight.	Summary Totals are based on the last daysheet date. Any transactions that occur after daysheeted are not accounted for.
A/R Aging Analysis - Location - Insurance A/R	Use this report to displays all outstanding Insurance Accounts Receivable by Location.	Daily Snap Shots: True end of day snapshot that occurs after hours. Therefore the Summary Totals no longer depend on daysheet date and are more real-time. Payments or charges entered after daysheeting will be accounted for because we take a snapshot overnight.	Summary Totals are based on the last daysheet date. Any transactions that occur after daysheeted are not accounted for.
A/R Aging Analysis - Location - Patient A/R	Use this report to displays all outstanding balances due from the patient, by Location.	Daily Snap Shots: True end of day snapshot that occurs after hours. Therefore the Summary Totals no longer depend on daysheet date and are more real-time. Payments or charges entered after daysheeting will be accounted for because we take a snapshot overnight.	Summary Totals are based on the last daysheet date. Any transactions that occur after daysheeted are not accounted for.

Report Name	Purpose of Report	New Reports Logic	Previous Reports Logic
A/R Aging Analysis - Location - Total A/R	Use this report to displays all outstanding Accounts Receivable (Insurance and Patient) by Location and breaks the balances up by different aging buckets.	Daily Snap Shots: True end of day snapshot that occurs after hours. Therefore the Summary Totals no longer depend on daysheet date and are more real-time. Payments or charges entered after daysheeting will be accounted for because we take a snapshot overnight.	Summary Totals are based on the last daysheet date. Any transactions that occur after daysheeted are not accounted for.
A/R Aging Analysis - Rendering Provider - Insurance A/R	Use this report to display Insurance Accounts Receivable by Rendering Provider.	Daily Snap Shots: True end of day snapshot that occurs after hours. Therefore the Summary Totals no longer depend on daysheet date and are more real-time. Payments or charges entered after daysheeting will be accounted for because we take a snapshot overnight.	Summary Totals are based on the last daysheet date. Any transactions that occur after daysheeted are not accounted for.
A/R Aging Analysis - Rendering Provider - Patient A/R	Use this report to display Patient Accounts Receivable by Rendering Provider.	Daily Snap Shots: True end of day snapshot that occurs after hours. Therefore the Summary Totals no longer depend on daysheet date and are more real-time. Payments or charges entered after daysheeting will be accounted for because we take a snapshot overnight.	Summary Totals are based on the last daysheet date. Any transactions that occur after daysheeted are not accounted for.
A/R Aging Analysis - Rendering Provider - Total A/R	Use this report to display all outstanding Accounts Receivable (Insurance and Patient) by Rendering Provider.	Daily Snap Shots: True end of day snapshot that occurs after hours. Therefore the Summary Totals no longer depend on daysheet date and are more real-time. Payments or charges entered after daysheeting will be accounted for because we take a snapshot overnight.	Summary Totals are based on the last daysheet date. Any transactions that occur after daysheeted are not accounted for.
Accounting Transfers	Use this report to view credits debited from patient credit accounts for a specified period.	Patient Count: Distinct count of patients	Patient Count: includes duplicate records
Charges Per Scheduled Appointment	Use this report to view charges associated with historical appointments scheduled for a specific time. You can see total charges based on all patients with the same appointment type and drill down into the specific charges for each patient.	Exclude CPT Codes 1-4 Patients: Only shows patients with charges. To view patients with appointments who have NO charges use the Unbilled Charges for Scheduled Visit report	Shows CPT Codes 1-4 (Payments, copays) Patients: Also shows patients with NO charges.

Report Name	Purpose of Report	New Reports Logic	Previous Reports Logic
Compare Allowable to Payment	Use this report to view your reimbursement values from your payers vs what your contracted allowable rates are. Users can easily see in the column Allowable Difference if they are seeing a trend of less or more for reimbursements.	NOT Daysheet Dependent End of Day snap shot	Daysheet Dependent: Only shows daysheeted transactions
Daysheet Log	Use the Daysheet Log to view pertinent financial totals from each daysheet processed.	No changes.	No changes.
Financial Summary	Use this report to view a summary of charges and payments collected for a specified time frame of transactions.	Patient Count: Distinct count of patients	Patient Count: includes duplicate records
Patient Credit Account	Use this report to view credits that were credited and debited from patient credit accounts for a specified period.	Posted Date: Anything with a posted date of today will not show on report Patient Count: Distinct count of patients	Posted Date: Anything with a posted date of today will show on report. Will need to exclude those from the OP report when comparing as there is a 1 day delay in Sigma Patient Count: includes duplicate records
Practice Level Adjustments	Use this report to view Practice Level Insurance Adjustments (PLAs) for a specified period. For example, when users process Electronic Remittances, and there is an Insurance Adjustment (ex: take back or interest payment) OP will create a PLA adjustment transaction to balance the electronic remittance.	Date of Service & Posted Date Pulls only daysheeted items and sigma is 1 day behind	Date of Service & Posted Date: Pulls only daysheeted items
Receipts for Deposit	Use this report to view payments and credits collected for a specified period that can be used to match your deposits to your bank.	*NEW* Posted Date filter. This will show the transactions for the posted date selected AS LONG AS they were daysheeted	
Reimbursement Analysis	Use this report to view a summary of billing data, determining the average reimbursement of CPT codes. Commonly used for Payment history by CPT, Insurance payment monitoring, and Payment history by provider.	Patient Count: Distinct count of patients	Patient Count: includes duplicate records

Report Name	Purpose of Report	New Reports Logic	Previous Reports Logic
Reimbursements per Scheduled Visit	Use this report to view the reimbursement values per scheduled visit, by Appointment Type	Visit Type: Driven by what is listed on the appointment and will show all CPT codes for that visit Average Charges: Based on all CPT Codes under that visit type Average Collected: Based on all CPT Codes under that visit type	Visit Type: Driven by the highest numbered CPT code only Average Charges: Based on that single CPT code Average Collected: Based on that single CPT code
Scheduled Appointments	Use this report to view future appointments scheduled for a specified of time.	Excludes non-patient notes	Show's non-patient notes
Total Receipts	Use this report to view payments and credits collected for a specified date range.	Patient Count: Distinct count of patients	Patient Count: Includes duplicate patient records
Transaction Analysis	Use this report to view your charges, payments, or adjustments for a day, a week, a month, or any time frame that you wish to isolate your data.	No changes.	No changes.
Transactions for Check Number	Use this report to review a posted EOB/ERA and balance funds posted, especially when there are complex elements such as recoups or take-backs.	Posted Date: Patient Credits will show the correct posted date	Posted Date: Patient Credits were showing posted date as payment date
Unbilled Charges for Scheduled Appts	Use this report daily or weekly to view scheduled appointments for patients that do not have an associated superbill or billed charges for appointments scheduled for the practice.	CPT Codes 1-4: Include patients with no true charges today but have CPT codes of 1-4	CPT Codes 1-4: If a patient had an appointment today, charges were not entered but payments, adjustments, etc. were made on a previous claim with today's date, the report didn't recognize that these weren't charges as we use CPT codes 1-4 to capture these. Therefore these patients are being excluded from the report.
Void Transactions Only	Use this report to view a summary of billing data, determining the average reimbursement of CPT codes. Commonly used for Payment history by CPT, Insurance payment monitoring, and Payment history by provider.	Search Fields: Removed options for DOS and Posting Date. Posted Date: Anything with a posted date that hasn't been daysheeted will not show on report.	Search Fields: Has search fields for DOS and Posting Date but you can't void something unless it's been daysheeted. The data will only show daysheeted items with a DOS of X date. The search results are the same as searching by daysheet date, then filtering the DOS by X date. Posted Date: Anything with a posted date that hasn't been daysheeted yet will show on report. Will need to exclude those from the OP report when comparing as there is a 1 day delay in Sigma.

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