

Financial Analytics (PA): Charges, Payments and Adjustments

Last Modified on 08/22/2024 4:10 pm EDT

This is a contracted feature. Contact solutions@officepracticum.com to learn about implementing this in your Practice.

Version 21.3

Path: Tools tab > Reporting button > Financial Analytics > Charges, Payments and Adjustments

When to Use this Report

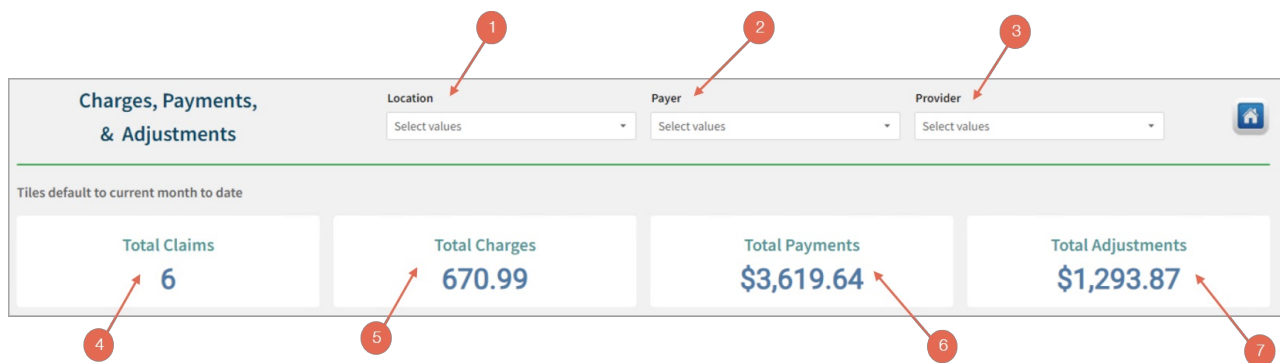
Use this dashboard to view Charges, Payments, and Adjustment Trends, compare current MTD/YTD to prior MTD/YTD. View charge lag times and outstanding superbills that have not been converted to claims.

About Charges, Payments and Adjustments

- [Charges, Payments and Adjustments Filters and Summary Tiles](#)
- [Charges, Payments and Adjustments Dashboards Overview](#)

Charges, Payments and Adjustments Filters and Summary Tiles

Filter and see the summaries for the Charges, Payments and Adjustments.

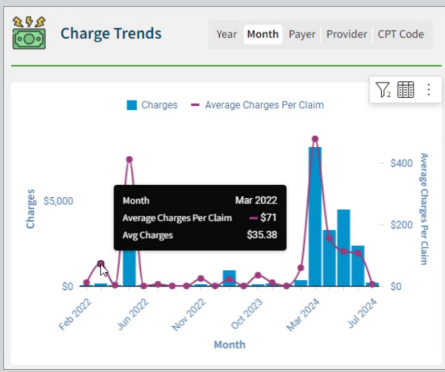
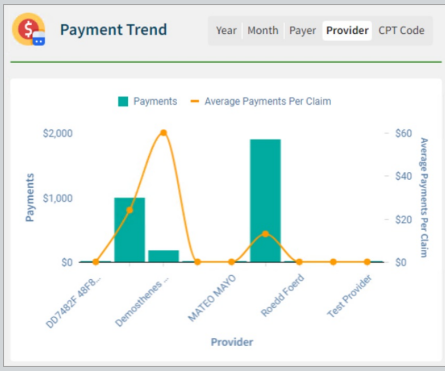


Number	Section	Description
1	Location	Use this filter to select the Location(s) where the services were performed.
2	Payer	Use this filter to select the Payer(s) associated with the claim.
3	Provider	Use this filter to select the Provider(s) who performed the service for the appointments.
4	Total Claims	Shows the total amount of claims within the report parameters.
5	Total Charges	Shows the total amount of charges within the report parameters.
6	Total Payments	Shows the total amount of payments within the report parameters.

7	Total Adjustments	Shows the total amount of adjustments within the report parameters.
---	-------------------	---

Charges, Payments and Adjustments Dashboards Overview

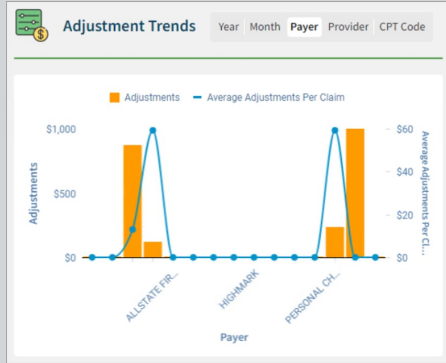
Each tile is defaulted to show the last six months. You can click the filter icon  within each tile to filter differently.

Charge Trends	Location Charge Trends																																														
<p>Type of report: Bar-graph</p> <p>Displays: View total charges over the last 3 years. Hover over each point to see the details.</p> <p>Details: View by Year, Month, Payer, Provider or CPT Code.</p>	<p>Type of report: Detailed Report</p> <p>Displays: View current Month-to-Date charges and compare to prior month charges. View current Year-to-Date charges and compare to prior year charges.</p> <p>Details: View amounts by each location and the Var Charges year over year. Summary of the totals for each column are on the bottom.</p>																																														
 <p>Charge Trends Year Month Payer Provider CPT Code</p> <p>Charges (Bar) Average Charges Per Claim (Line)</p> <p>Month: Mar 2022 Average Charges Per Claim: \$71 Avg Charges: \$35.38</p>	<p>Location Charge Trends</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Location</th> <th>Current MTD Charges</th> <th>Prior Month Charges</th> <th>Current YTD Charges</th> <th>Prior Year Charges</th> <th>Var Charges YOY (%)</th> </tr> </thead> <tbody> <tr> <td>ABC Peds LLC</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.03</td> <td>-100% ↓</td> </tr> <tr> <td>Anon Peds</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.12</td> <td>\$5.28</td> <td>-97.73% ↓</td> </tr> <tr> <td>Main Office</td> <td>\$76.00</td> <td>\$312.25</td> <td>\$6,562.31</td> <td>\$0.81</td> <td>810061.73% ↑</td> </tr> <tr> <td>Main Office - Horsha...</td> <td>\$0.00</td> <td>\$0.19</td> <td>\$610.30</td> <td>\$120.06</td> <td>408.33% ↑</td> </tr> <tr> <td>Satellite Location</td> <td>\$101.94</td> <td>\$2,050.09</td> <td>\$11,544.20</td> <td>\$1,012.38</td> <td>1040.3% ↑</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>SUMMARY</th> <th>\$177.94</th> <th>\$2,362.53</th> <th>\$18,716.93</th> <th>\$1.13</th> </tr> </thead> <tbody> <tr> <td>5 rows - 11 columns</td> <td>Total Current MTD Charges</td> <td>Total Prior Month Charges</td> <td>Total Current YTD Charges</td> <td>Total Pri</td> </tr> </tbody> </table>	Location	Current MTD Charges	Prior Month Charges	Current YTD Charges	Prior Year Charges	Var Charges YOY (%)	ABC Peds LLC	\$0.00	\$0.00	\$0.00	\$0.03	-100% ↓	Anon Peds	\$0.00	\$0.00	\$0.12	\$5.28	-97.73% ↓	Main Office	\$76.00	\$312.25	\$6,562.31	\$0.81	810061.73% ↑	Main Office - Horsha...	\$0.00	\$0.19	\$610.30	\$120.06	408.33% ↑	Satellite Location	\$101.94	\$2,050.09	\$11,544.20	\$1,012.38	1040.3% ↑	SUMMARY	\$177.94	\$2,362.53	\$18,716.93	\$1.13	5 rows - 11 columns	Total Current MTD Charges	Total Prior Month Charges	Total Current YTD Charges	Total Pri
Location	Current MTD Charges	Prior Month Charges	Current YTD Charges	Prior Year Charges	Var Charges YOY (%)																																										
ABC Peds LLC	\$0.00	\$0.00	\$0.00	\$0.03	-100% ↓																																										
Anon Peds	\$0.00	\$0.00	\$0.12	\$5.28	-97.73% ↓																																										
Main Office	\$76.00	\$312.25	\$6,562.31	\$0.81	810061.73% ↑																																										
Main Office - Horsha...	\$0.00	\$0.19	\$610.30	\$120.06	408.33% ↑																																										
Satellite Location	\$101.94	\$2,050.09	\$11,544.20	\$1,012.38	1040.3% ↑																																										
SUMMARY	\$177.94	\$2,362.53	\$18,716.93	\$1.13																																											
5 rows - 11 columns	Total Current MTD Charges	Total Prior Month Charges	Total Current YTD Charges	Total Pri																																											
<p>Payment Trends</p> <p>Type of report: Bar-graph</p> <p>Displays: View total payments over the last 3 years. Hover over each point to see the details.</p> <p>Details: View by Year, Month, Payer, Provider or CPT Code.</p>	<p>Location Payment Trends</p> <p>Type of report: Detailed Report</p> <p>Displays: View current Month-to-Date payments and compare to prior month payments. View current Year-to-Date payments and compare to prior year payments.</p> <p>Details: View amounts by each location and the Var Payments year over year. Summary of the totals for each column are on the bottom.</p>																																														
 <p>Payment Trend Year Month Payer Provider CPT Code</p> <p>Payments (Bar) Average Payments Per Claim (Line)</p>	<p>Location Payment Trends</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Location</th> <th>Current MTD Payments</th> <th>Prior Month Payments</th> <th>Current YTD Payments</th> <th>Prior Year Payments</th> <th>Var Payments YOY (%)</th> </tr> </thead> <tbody> <tr> <td>ABC Peds LLC</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>0%</td> </tr> <tr> <td>Anon Peds</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.03</td> <td>-100% ↓</td> </tr> <tr> <td>Main Office</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$800.00</td> <td>\$0.00</td> <td>0%</td> </tr> <tr> <td>Main Office - Horsha...</td> <td>\$0.00</td> <td>\$0.18</td> <td>\$229.29</td> <td>\$0.00</td> <td>0%</td> </tr> <tr> <td>Satellite Location</td> <td>\$0.00</td> <td>\$448.21</td> <td>\$1,354.95</td> <td>\$300.00</td> <td>351.65% ↑</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>SUMMARY</th> <th>\$0.00</th> <th>\$448.39</th> <th>\$2,384.24</th> <th>\$0.00</th> </tr> </thead> <tbody> <tr> <td>5 rows - 11 columns</td> <td>Total Current MTD Payments</td> <td>Total Prior Month Payments</td> <td>Total Current YTD Payments</td> <td>Tot</td> </tr> </tbody> </table>	Location	Current MTD Payments	Prior Month Payments	Current YTD Payments	Prior Year Payments	Var Payments YOY (%)	ABC Peds LLC	\$0.00	\$0.00	\$0.00	\$0.00	0%	Anon Peds	\$0.00	\$0.00	\$0.00	\$0.03	-100% ↓	Main Office	\$0.00	\$0.00	\$800.00	\$0.00	0%	Main Office - Horsha...	\$0.00	\$0.18	\$229.29	\$0.00	0%	Satellite Location	\$0.00	\$448.21	\$1,354.95	\$300.00	351.65% ↑	SUMMARY	\$0.00	\$448.39	\$2,384.24	\$0.00	5 rows - 11 columns	Total Current MTD Payments	Total Prior Month Payments	Total Current YTD Payments	Tot
Location	Current MTD Payments	Prior Month Payments	Current YTD Payments	Prior Year Payments	Var Payments YOY (%)																																										
ABC Peds LLC	\$0.00	\$0.00	\$0.00	\$0.00	0%																																										
Anon Peds	\$0.00	\$0.00	\$0.00	\$0.03	-100% ↓																																										
Main Office	\$0.00	\$0.00	\$800.00	\$0.00	0%																																										
Main Office - Horsha...	\$0.00	\$0.18	\$229.29	\$0.00	0%																																										
Satellite Location	\$0.00	\$448.21	\$1,354.95	\$300.00	351.65% ↑																																										
SUMMARY	\$0.00	\$448.39	\$2,384.24	\$0.00																																											
5 rows - 11 columns	Total Current MTD Payments	Total Prior Month Payments	Total Current YTD Payments	Tot																																											
Adjustment Trends	Location Adjustment Trends																																														

Type of report Bar-graph

Displays: View total adjustments over the last 3 years. Hover over each point to see the details.

Details: View by Year, Month, Payer, Provider or CPT Code.



Type of report Detailed Report

Displays: View current Month-to-Date adjustments and compare to prior month adjustments. View current Year-to-Date adjustments and compare to prior year adjustments.

Details: View amounts by each location and the Var Payments year over year. Summary of the totals for each column are on the bottom.

Location Adjustment Trends Back to Top ↑

Location	Current MTD Adjustm...	Prior Month Adjustme...	Current YTD Adjustm...	Prior Year Adjustme...	Var Adjustments YOY (%)
ABC Peds LLC	\$0.00	\$0.00	\$0.00	\$0.00	0 %
Anon Peds	\$0.00	\$0.00	\$0.00	\$0.01	-100 % ↓
Main Office	\$0.00	\$0.00	\$670.00	\$0.00	0 %
Main Office - Horsh...	\$0.00	\$0.00	\$125.89	\$0.00	0 %
Satellite Location	\$0.00	\$286.88	\$1,134.05	\$300.00	278.02 % ↑

SUMMARY	\$0.00	\$286.88	\$1,929.94
5 rows - 11 columns	Total Current MTD Adjustm...	Ttotal Prior Month Adjustm...	Total Current YTD Adjustm...

Monthly Billing with Average Charge Lag

Type of report Bar-graph

Displays: View month over month charge lag, total patients seen, # of claims, Charges, Payments, and Adjustments. Summaries for each column are in the Summary section.

Monthly Billing with Average Charge Lag

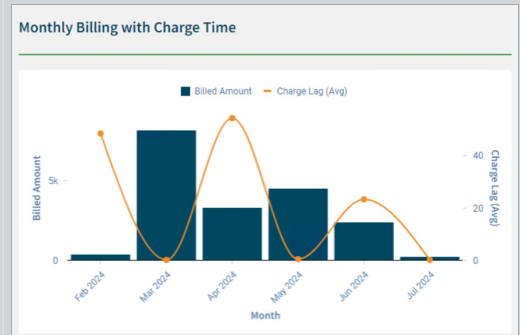
Month	Charge Lag (...)	# of Pati...	# of Cla...	Charges	Payments	Adjustments
Jul 2024	0.00	8	30	\$177.94	\$0.00	\$0.00
Jun 2024	23.22	12	22	\$2,362.53	\$448.59	\$285.88
May 2024	0.32	18	40	\$4,470.79	\$0.08	\$0.00
Apr 2024	54.08	19	22	\$3,266.42	\$305.66	\$447.17
Mar 2024	0.00	15	18	\$8,084.06	\$1,614.11	\$1,195.89
Feb 2024	48.30	5	6	\$355.15	\$15.00	\$0.00

SUMMARY	15	77	137	\$18,717
6 rows - 13 columns	Average Charge Lag	Total # of Patients	Total # of Claims	Total Billed #

Monthly Billing with Charge Time

Type of report Detailed Report

Displays: View the last 6 months billed amount and charge lag. Hover over each point on the graph to see the details.



Unconverted Superbills

Type of report Bar-graph

Displays: This shows the last 6 months of unconverted superbills grouped by their stage (a). It shows the days since date of service (f) and superbill charges(e) for each patient (d). The left side of the report also shows the total number of patients (b) and superbill charges (c) for that stage.

Unconverted Superbills

a Stage	b # of Patients	c Total Superbill Charges	d Patient	e Superbills Charges	f Days Since DOS
+ Hold - not finalized	42	\$0.00			
- Ready	46	\$0.05			
			301 RYAN 6E323D	\$0.00	92
			33898 MALAKAI VANG	\$0.00	108
			34317 ENZO OCHOA	\$0.00	153
			35232 DONOVAN HAHN	\$0.00	171
			3669 ASHLEY 0F618B1	\$0.00	142
			5668 AVA B00DC7	\$0.00	10
			650 LAURA KTEAM	\$0.00	171
			7371 DANIELLE TEST	\$0.00	108
			7375 CHRIS TEST	\$0.00	547
			7411 LYNNE XXXTESTBARNARD	\$0.00	13
			7444 Jackie Testerson	\$0.00	122
			7445 Jackie XXXTesterson	\$0.00	122
			7452 Friday Test	\$0.00	124
			7526 JESSE PINKMAN	\$0.00	316
			7531 NEMO TEST	\$0.00	108

SUMMARY ^ 88 rows - 6 columns