

Financial Analytics (PA): Provider Financial Analysis

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🔒 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 > Provider Financial Analysis

When to Use this Report

Use this dashboard as a provider comparison based on charges and payments, including total patient and claim counts. It features claim trends and a detailed breakdown of payments and adjustments by date range.

About Provider Financial Analysis

Filters

You can filter this report by **Location** and/or by **Provider** by selecting from the drop-downs. You can click the filter icon  within each tile to filter differently.

Provider Financial Analysis Dashboards Overview

Provider Charge and Payment Trends

Type of report: Detailed Report

Displays: Shows a month over month provider comparison of patients seen, Claims Created, Charges, Payments, Adjustments, Net, GCR (Gross Collection Rate), and NCR (Net Collection Rate).

Details:

- Expand each month in the Account Period column to see the details for each provider.

Account Period	Provider	Total # of Patients	Total # of Claims	Charges	Payments	Adjustments	Net	GCR %	NCR %
August 2024	ADEN P. WEBB, MD	1	1	\$100.48	\$0.00	\$0.00	\$100.48	0.00%	0.00%
	ARI SLOAN, MD	1	1	\$240.00	\$0.00	\$0.00	\$240.00	0.00%	0.00%
	CASH SUAREZ, MD	2	2	\$264.99	\$120.00	-\$170.00	\$434.99	45.28%	-18.87%
	Engage Engage	1	1	\$159.00	\$0.00	\$0.00	\$159.00	0.00%	0.00%
	FRANCIS COMBS	0	0	\$0.00	\$20.00	\$5.00	-\$5.00	null	null
	JOURNEE FOWLER	2	2	\$293.00	\$0.00	\$0.00	\$293.00	0.00%	0.00%
	Matt Tadros	5	8	\$1,007.89	\$50.00	\$160.00	\$847.89	4.96%	20.84%
	NATHANIEL BLACKWELL	1	1	\$32.00	\$0.00	\$0.00	\$32.00	0.00%	0.00%
	PEYTON RASMUSSEN, MD	3	3	\$342.48	\$0.00	\$0.00	\$342.48	0.00%	0.00%
	SHAWN CARLSON, MD	4	4	\$845.48	\$0.00	\$0.00	\$845.48	0.00%	0.00%
Total		16	23	\$3,285.32	\$190.00	-\$5.00	\$3,290.32	5.78%	5.63%
July 2024	Total	7	11	\$723.42	\$0.00	\$0.00	\$723.42	0.00%	0.00%
June 2024	Total	5	11	\$903.93	\$452.12	\$95.37	\$808.56	50.02%	60.57%
May 2024	Total	14	18	\$2,186.90	\$122.53	\$1.40	\$2,185.50	5.60%	5.67%
April 2024	Total	4	6	\$799.44	\$225.25	\$111.47	\$687.97	28.18%	42.12%
March 2024	Total	7	8	\$848.93	\$104.01	\$0.00	\$848.93	12.25%	12.25%
February 2024	Total	22	30	\$6,104.85	\$2,525.73	\$1,090.63	\$5,014.22	41.37%	59.24%
January 2024	Total	12	13	\$1,564.78	\$0.00	\$0.00	\$1,564.78	0.00%	0.00%
December 2023	Total	3	3	\$542.01	\$425.00	-\$15.76	\$557.77	78.41%	75.50%
November 2023	Total	30	40	\$6,682.99	\$890.01	\$208.00	\$6,474.99	13.32%	16.43%
October 2023	Total	11	25	\$1,768.96	\$148.00	\$0.00	\$1,768.96	8.37%	8.37%

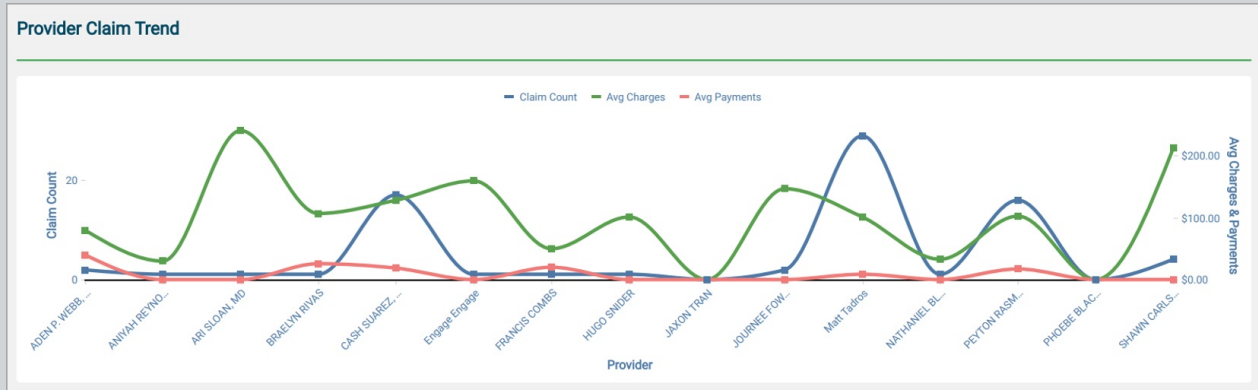
Provider Claim Trends

Type of report: Line Graph

Displays: Shows the providers claim count, average charges, and average payments for the last 6 months.

Details:

- Hover over each of the points to see the detailed claim count, average charges, and average payment for each provider.



Provider Charges Trends

Type of report: Summary Detailed Report

Displays: Shows providers current Month-to-Date charges compared to last months charges, current Year-to-Date charges compared to last years charges.

Summary: The Totals for each column are listed along the bottom.

Provider	Current MT...	Prior Mont...	Current YTD Charges	Prior Year...	Var Charge...
ADEN P. WEBB, MD	\$100.48	\$58.00	\$158.48	\$399.99	-60.38 % ↓
ADRIAN HOWE	\$0.00	\$0.00	\$0.00	\$214.01	-100 % ↓
ANIYAH REYNOLDS	\$0.00	\$30.00	\$30.00	\$0.00	0 %
ARI SLOAN, MD	\$240.00	\$0.00	\$240.00	\$286.00	-16.08 % ↓
AUBREE HOUSTON	\$0.00	\$0.00	\$0.00	\$0.00	0 %
BRADEN PETERS	\$0.00	\$0.00	\$0.00	\$0.00	0 %
BRAELYN RIVAS	\$0.00	\$0.00	\$105.99	\$105.99	0 %
BRINLEY BOLTON, NP	\$0.00	\$0.00	\$0.00	\$250.00	-100 % ↓
CASEY ESTES	\$0.00	\$0.00	\$0.00	\$0.00	0 %
CASH SUAREZ, MD	\$264.99	\$0.00	\$4,676.94	\$2,968.96	57.53 % ↑
COLE BUSH	\$0.00	\$0.00	\$0.00	\$0.00	0 %
DAKOTA VELEZ	\$0.00	\$0.00	\$0.00	\$0.00	0 %
SUMMARY	\$3,285.32		\$723.42		\$16,400.00
36 rows - 11 columns	Total Current MTD Charges		Total Prior Month Charges		Total C...

Provider Payment Trends

Type of report: Summary Detailed Report

Displays: Shows providers current Month-to-Date payments compared to last months payments, current Year-to-Date payments compared to last years payments.

Summary: The Totals for each column are listed along the bottom.

Provider	Current MTD Pa...	Prior Month Pa...	Current YTD Pa...	Prior Year Pay...	Var Payments Y...
ADEN P. WEBB, MD	\$0.00	\$0.00	\$78.60	\$214.90	-63.42 % ↓
ADRIAN HOWE	\$0.00	\$0.00	\$0.00	\$341.95	-100 % ↓
ANIYAH REYNOLDS	\$0.00	\$0.00	\$0.00	\$674.49	-100 % ↓
ARI SLOAN, MD	\$0.00	\$0.00	\$0.00	\$117.98	-100 % ↓
AUBREE HOUSTON	\$0.00	\$0.00	\$0.00	\$75.00	-100 % ↓
BRADEN PETERS	\$0.00	\$0.00	\$0.00	\$761.50	-100 % ↓
BRAELYN RIVAS	\$0.00	\$0.00	\$25.03	\$523.18	-95.22 % ↓
BRINLEY BOLTON, NP	\$0.00	\$0.00	\$0.00	\$78.60	-100 % ↓
CASEY ESTES	\$0.00	\$0.00	\$0.00	\$0.00	0 %
CASH SUAREZ, MD	\$120.00	\$0.00	\$1,295.69	\$1,183.38	9.49 % ↑
COLE BUSH	\$0.00	\$0.00	\$0.00	\$138.24	-100 % ↓
DAKOTA VELEZ	\$0.00	\$0.00	\$0.00	\$360.48	-100 % ↓
SUMMARY	\$190.00		\$0.00		\$3,600.00
36 rows - 11 columns	Total Current MTD Payme...		Total Prior Month Payme...		Total