

A man with short brown hair, wearing a blue and white patterned short-sleeved shirt, is sitting in a wooden chair in a lush, tropical garden. The garden features a small waterfall cascading over dark, porous rocks. Various tropical plants, including bromeliads with red and yellow flowers and large green leaves, are scattered throughout the scene. The background is filled with more dense foliage and a wooden fence. The overall atmosphere is bright and natural.

Things You Don't Know You Don't Know:
Customized Business Intelligence for Medical Practices

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Learning Objectives

- Describe reports that drive financial metrics instead of simply reporting results
- Explain how appointments drive financial results and how to measure appointment data
- See real-world examples from practices using customized business intelligence





How much has your practice changed in the past 3 years?



How much has your practice management system changed in the past 20 years?

Cost of Rescheduling Patients

All Providers

Canceled By	Rescheduled 2 Weeks	Rescheduled 3 Weeks	Rescheduled 4 Weeks
Overall	27.8%	34.4%	40.0%
Patient	20.5%	27.1%	32.3%
Doctor	43.2%	50.1%	56.6%

Pain Providers Only

Canceled By	Rescheduled 2 Weeks	Rescheduled 3 Weeks	Rescheduled 4 Weeks
Overall	27.8%	34.0%	39.9%
Patient	25.3%	32.1%	38.9%
Doctor	31.9%	37.2%	41.6%

All Non-Pain Providers

Canceled By	Rescheduled 2 Weeks	Rescheduled 3 Weeks	Rescheduled 4 Weeks
Overall	27.7%	34.6%	40.1%
Patient	18.9%	25.4%	30.0%
Doctor	49.1%	56.9%	64.4%

Appointment Scrubber

Appt Rule	Appt Start	Facility	Acct	Resource	Appt Type	Created By	Create Date
Check Insurance Verification	1/10/2022 9:15 AM		162480		Follow Up		12/8/2021
Check Insurance Verification	1/10/2022 11:00 AM		118141		Cystoscopy		1/7/2022
Patient balance over \$250	1/10/2022 11:30 AM		148653		Cystoscopy with Stent Removal		12/16/2021
Self Pay	1/10/2022 11:30 AM		121996		Mens Health - Injection		11/9/2021
Check Insurance Verification	1/10/2022 1:00 PM		163397		Cystoscopy		1/4/2022
Check Insurance Verification	1/10/2022 1:30 PM		164179		Cystoscopy		12/8/2021
Check Insurance Verification	1/10/2022 1:30 PM		134670		Follow Up		1/7/2022
Patient balance over \$250	1/10/2022 1:30 PM		134670		Follow Up		1/7/2022
Self Pay	1/10/2022 1:45 PM		108406		Follow Up		1/4/2022
No allocation set	1/10/2022 2:00 PM		106862		Follow Up - 30 Min		11/30/2021
No Referring Physician	1/10/2022 2:30 PM		164729		Urgent New Patient		1/6/2022
Patient balance over \$250	1/10/2022 2:30 PM		114324		Post OP Visit		12/13/2021
No allocation set	1/10/2022 3:45 PM		160680		Follow Up		10/11/2021
Reschedule Status	1/11/2022 8:30 AM		131086		Venipuncture		9/29/2021
Reschedule Status	1/11/2022 8:45 AM		56301		Venipuncture		9/13/2021
Check Insurance Verification	1/11/2022 9:00 AM		157434		Follow Up		1/6/2022



Potential Appointment Scrubber Rules

Missing Insurance
Verification

Missing Pre-
authorization

Watch CIGNA
Insurance with
this provider

Appointment in
Global Period

Patient Balance Over
\$250

Reschedule
Status

Missing Copay
Data

Missing Test
Results

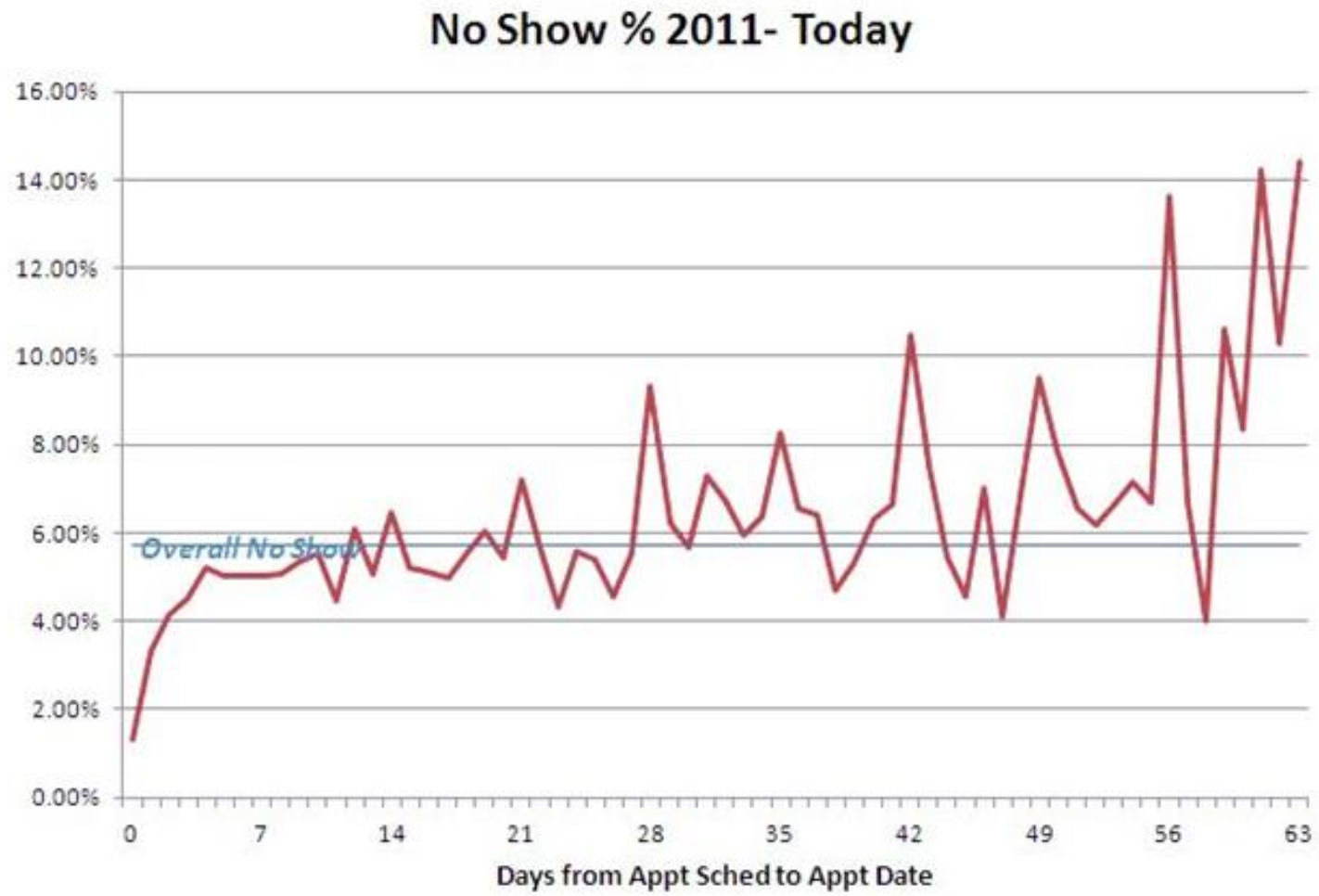
Two Appointments
on the Same Day

Wrong Provider

Appointment is Too
Soon

What rules would you add if
your practice had
an appointment scrubber?

Are You Causing No Shows?





Surgery Appt Cancelled but Post Op Appt is Not

Post Op Appointment Needs Cancelled as of 1/14/2022

Account Number	Post Op Resource	Post Op Appt Date	Surgery Facility
		1/25/2022	PSO
		1/25/2022	PSO
		2/9/2022	PSO

Find Potential Missing Procedures

Potential Missing Procedures (based on 99024)

Account Num	Ticket Number	DOS	Provider	Insurance	Days on Report
		12/14/2021		Anthem 15393	2
		12/14/2021		Medicare Humana HMO 14049 ADV	2
		12/16/2021		HIP Anthem ** 15229 MCD	0
		12/16/2021		Medicare AARP UHC 15104 ADV	0
		12/16/2021		Hoosier HW Anthem/HW Connect ** 14691 MCD	0
		12/15/2021		Sentry Ins WC 4346	1
		12/15/2021		Medicare Humana 14050 ADV	1
		12/15/2021		Signature Care Health Plan 1094 SC	1
		12/14/2021		Medicare Trad** 4854 MCR	2
		12/14/2021		Signature Care Health Plan 1094 SC	2
		12/14/2021		Anthem 15393	2

What is your practice doing to
cause no shows?

Open Appointment Slots

Open Appointment Slots Today and Tomorrow as of 3/21/2022

Appt Start	Facility	Category	Type
Providers Here			
3/21/2022 8:30 AM			New Patient - 15
3/21/2022 10:30 AM			Established Patient - 15
3/21/2022 3:00 PM			Established Patient - 15
3/21/2022 9:00 AM			New Patient - 30
3/21/2022 9:15 AM			Established Patient - 15
3/21/2022 3:45 PM			Procedure
3/22/2022 8:45 AM			Established Patient - 15
3/22/2022 1:30 PM			New Patient - 15
3/22/2022 11:30 AM			Procedure

Cancelled Appointments

Yesterday's Cancelled Appointments as of 3/21/2022

Appt Start	Facility	Appt Type
Providers Here		
3/25/2022 2:30 PM		Established Patient - 15
4/1/2022 11:30 AM		New Patient - 30
4/7/2022 1:00 PM		Procedure - 20
4/6/2022 9:00 AM		Established Patient - 20
4/6/2022 11:15 AM		Established Patient - 20
4/15/2022 8:45 AM		Procedure
3/29/2022 9:30 AM		Established Patient - 15
3/30/2022 3:30 PM		New Patient - 30
3/24/2022 8:30 AM		Procedure



Available Cancelled Appointments

Available Cancelled Appointments as of 4/4/2022

Open Appointment	Loc	Appt Category	Prior Acct	Prior Patient	Last Change Date
Providers Here					
4/4/2022 10:00 AM	WW	Procedure/Filler	3063187		3/31/2022
4/5/2022 8:00 AM	LV	Established	2340552		3/1/1938
4/8/2022 3:30 PM	BH	Established	3128928		3/29/2022
4/19/2022 8:00 AM	BH	MOHS Surgery	211286		3/30/2022
4/6/2022 1:45 PM	WW	Established	3157078		3/23/2022
4/4/2022 10:15 AM	LV	Established	5199		3/30/2022
4/5/2022 1:30 PM	WW	Established	3064967		3/31/2022
4/5/2022 2:00 PM	WW	Procedure	3174319		3/28/2022
4/5/2022 4:15 PM	WW	Established	3162258		4/1/2022
4/7/2022 9:15 AM	LV	MOHS Surgery	3067201		3/31/2022

Track Referrals by both Procedure and New Patient Counts

Referring Physicians	☰ Colonoscopy			Colonoscopy Total	☰ New Pt			New Pt Total	Grand Total
	☑ 2020	2021	2022		2020	2021	2022		
	680	562	359	1,601	257	234	126	617	2,218
	638	552	469	1,659	63	82	53	198	1,857
	530	420	318	1,268	192	202	123	517	1,785
	547	435	242	1,224	226	202	123	551	1,775
	517	431	324	1,272	170	172	60	402	1,674
	379	268	272	919	294	229	141	664	1,583
	543	461	193	1,197	148	151	83	382	1,579
	497	351	242	1,090	206	169	112	487	1,577
	485	402	251	1,138	204	151	80	435	1,573
	460	430	298	1,188	145	154	76	375	1,563
	454	349	273	1,076	189	159	110	458	1,534
	372	315	322	1,009	192	165	111	468	1,477
	439	325	244	1,008	152	170	79	401	1,409
	303	296	220	819	135	144	89	368	1,187
	357	326	2	685	62	55	1	118	803
	30	103	114	247	28	96	63	187	434
	1	16	145	162	1	17	124	142	304
	53	50	40	143	58	47	41	146	289

Sort by
Major
Referring
Physicians
Here



Attract New Patients by Offering Urgent Care

Row Labels	Urgent Care Visits	Sum of ORAVisits	Sum of PTVisits	Sum of PTCharges	Sum of PTPayments	Sum of MRIVisits	Sum of MRICHarges	Sum of MRIPayments	Sum of SurgeryVisits	Sum of SurgeryCharges	Sum of SurgeryPayments
2021	15,044	49,638	18,688	\$4,319,666	\$1,875,343	2,842	\$4,271,761	\$1,462,599	1,800	\$7,863,570	\$2,216,315
Jan	852	4,223	1,907	\$441,835	\$213,449	210	\$328,404	\$120,205	165	\$754,367	\$224,582
Feb	839	3,646	1,441	\$331,321	\$154,334	190	\$288,778	\$105,249	142	\$556,199	\$178,337
Mar	1,180	5,163	2,107	\$483,355	\$219,197	258	\$407,890	\$146,973	234	\$938,903	\$271,812
Apr	1,330	4,948	1,850	\$420,643	\$184,458	280	\$429,804	\$155,794	172	\$864,177	\$222,502
May	1,267	4,549	1,759	\$407,665	\$185,405	240	\$337,591	\$119,818	164	\$689,861	\$194,722
Jun	1,554	5,366	2,138	\$491,029	\$213,910	274	\$408,629	\$137,070	213	\$937,245	\$261,024
Jul	1,312	4,530	1,685	\$387,645	\$176,900	259	\$397,455	\$142,785	159	\$739,142	\$211,168
Aug	1,539	4,687	1,730	\$404,264	\$173,187	284	\$411,423	\$141,856	147	\$730,257	\$208,551
Sep	1,451	4,065	1,266	\$295,883	\$128,160	229	\$354,462	\$118,976	135	\$587,552	\$183,246
Oct	1,317	3,315	1,105	\$253,270	\$95,713	222	\$337,460	\$109,744	102	\$430,824	\$114,741
Nov	1,220	2,949	954	\$224,721	\$85,152	206	\$308,201	\$94,939	99	\$366,780	\$96,882
Dec	1,183	2,197	746	\$178,035	\$45,478	190	\$261,665	\$69,190	68	\$268,263	\$48,748
2022	1,977	2,172	822	\$196,475	\$50,598	226	\$325,770	\$51,457	73	\$332,138	\$58,031
Jan	1,182	1,788	686	\$164,953	\$40,738	184	\$267,786	\$43,739	55	\$271,304	\$45,721
Feb	795	384	136	\$31,522	\$9,860	42	\$57,984	\$7,718	18	\$60,834	\$12,309
Grand Total	17,021	51,810	19,510	\$4,516,140	\$1,925,941	3,068	\$4,597,531	\$1,514,057	1,873	\$8,195,708	\$2,274,345



Ancillaries from New Patients

Insurance Group	(All)	▼											
Referring Provider	(All)	▼											
Referring Provider Org	(All)	▼											
		▼											
	5		11.2	5		11.2	0		1		30.0	0	
	43		4.7	43		4.7	0		4		32.0	0	
	214		17.7	214		17.7	1	45.0	403		15.0	1	36.0
	87		14.3	87		14.3	0		49		12.2	0	
	0			0			0		11		32.4	0	
	111		17.0	111		17.0	2	45.5	429		13.9	1	85.0
	4		31.0	4		31.0	4	23.8	85		23.1	7	44.9
	0			0			0		1		3.0	0	
	0			0			0		0			0	
	31		20.6	31		20.6	0		131		13.3	2	34.0
	1		21.0	1		21.0	0		0			0	
	16		24.7	16		24.7	3	33.3	89		13.3	2	24.5
	52		17.9	52		17.9	5	62.2	281		14.7	6	38.5
	1		90.0	1		90.0	2	43.0	31		17.6	0	
	7		1.0	7		1.0	0		1		43.0	0	
	43		14.0	43		14.0	4	38.8	204		12.3	12	37.6
	11		19.0	11		19.0	11	33.9	316		12.4	5	36.4



Automate Physician Comp Calculations

February 2022 Pillar Report

Rolling Twelve Months (March 2021 - February 2022)

	Receipts		New		Established		Total Pt Count		Adj wRVU		Case Count		Pillar %
		%						%		%			
Group Total	13,578,200.64	100.00%	5,156	9,798	14,954	100.00%	178,937.36	100.00%	10,510	100.00%	100.00%		
	743,499.45	5.48%	308	690	998	6.67%	10,276.42	5.74%	643	6.12%	6.00%		
	507,669.29	3.74%	241	361	602	4.03%	6,686.41	3.74%	439	4.18%	3.92%		
	996,561.48	7.34%	213	579	792	5.30%	13,927.43	7.78%	808	7.69%	7.03%		
	1,210,014.24	8.91%	359	1,255	1,614	10.79%	14,063.34	7.86%	717	6.82%	8.60%		
	720,263.75	5.30%	296	471	767	5.13%	10,283.41	5.75%	637	6.06%	5.56%		
	845,228.85	6.22%	435	1,135	1,570	10.50%	10,853.93	6.07%	581	5.53%	7.08%		
	752,198.77	5.54%	345	381	726	4.85%	10,073.18	5.63%	688	6.55%	5.64%		
	878,758.17	6.47%	248	806	1,054	7.05%	11,960.29	6.68%	531	5.05%	6.31%		
	870,672.39	6.41%	451	362	813	5.44%	12,169.44	6.80%	805	7.66%	6.58%		
	1,201,735.97	8.85%	339	858	1,197	8.00%	12,313.13	6.88%	694	6.60%	7.58%		
	584,287.16	4.30%	374	214	588	3.93%	8,153.19	4.56%	543	5.17%	4.49%		
	1,119,176.05	8.24%	483	422	905	6.05%	14,606.77	8.16%	1,052	10.01%	8.12%		
	581,406.77	4.28%	218	924	1,142	7.64%	8,619.01	4.82%	342	3.25%	5.00%		
	664,428.57	4.89%	235	606	841	5.62%	9,320.41	5.21%	542	5.16%	5.22%		
	741,287.44	5.46%	327	299	626	4.19%	10,945.08	6.12%	544	5.18%	5.23%		
	1,161,012.29	8.55%	284	435	719	4.81%	14,685.92	8.21%	944	8.98%	7.64%		

Days Worked

	Last Month	2 Months Ago	3 Months Ago	4 Months Ago
Work Days in Month	21	19	21	21
Average Days Worked	14.7	13.7	15.7	14.8
Total Appointments	6,417	5,897	6,553	6,359
Avg Appts/Work Day	437.9	429.5	417.6	428.3
<hr/>				
Days Worked	11	13	20	12
Total Appointments	158	172	192	149
Avg Appts/Work Day	14.4	13.2	9.6	12.4
<hr/>				
Days Worked	17	11	17	13
Total Appointments	265	183	244	252
Avg Appts/Work Day	15.6	16.6	14.4	19.4
<hr/>				
Days Worked	15	10	16	16
Total Appointments	197	180	222	197
Avg Appts/Work Day	13.1	18.0	13.9	12.3



Weekly Appointment Dashboard

Weekly Appointment Dashboard as of 2/21/2022				
	Month YOY	Current MTD	Average Daily Visits MTD	Projected Month
Office Visits				
	3,665	2,973	212.4	4,247
	1,092	916	65.4	1,309
	442	513	36.6	733
Telehealth	14	22	2.0	40
OV Totals	5,213	4,424	316.4	6,329
Urgent Care				
	69	79	4.9	119
	17	1	1.0	20
	1	0		
Urgent Care Totals	87	80	5.9	139
MRI	599	454	26.7	641
Injections	125	107	9.7	195
Surgeries	271	258	18.4	369
Physical Therapy				
	1,666	1,328	78.1	1,875
	1,772	1,475	86.8	2,082
	1,012	898	52.8	1,268
Telehealth	1	0	0.0	
PT Totals	4,451	3,701	217.7	5,225



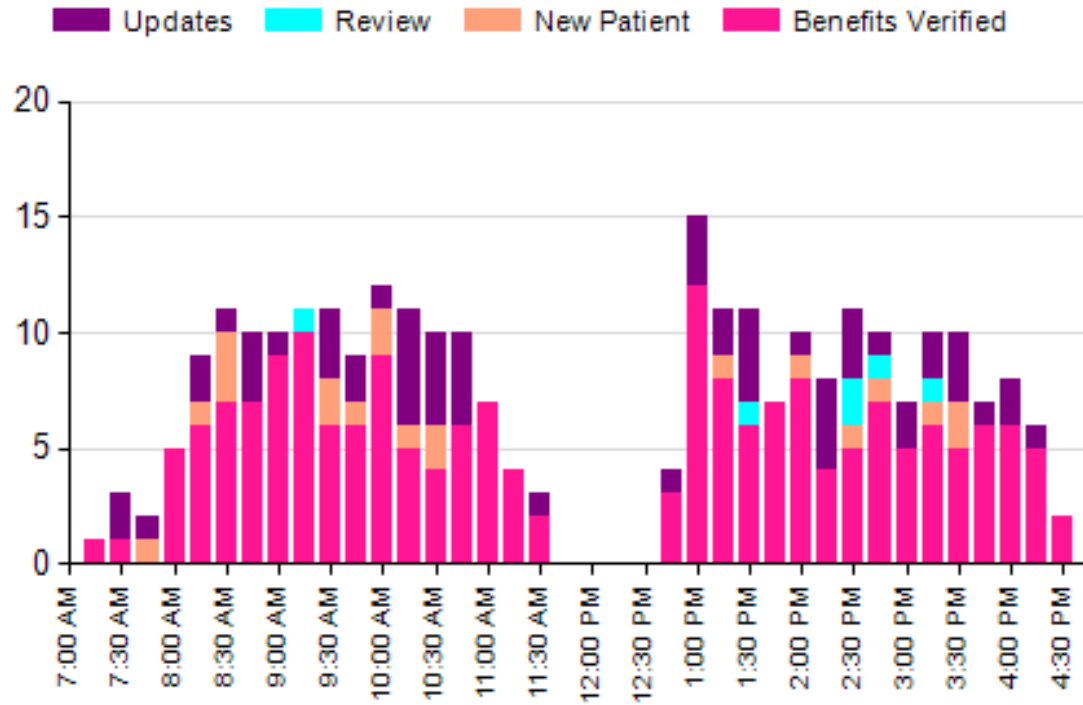
Medicaid Appointments Early in the Month

Medicaid HIP Scheduled Early in Month as of 3/14/2022

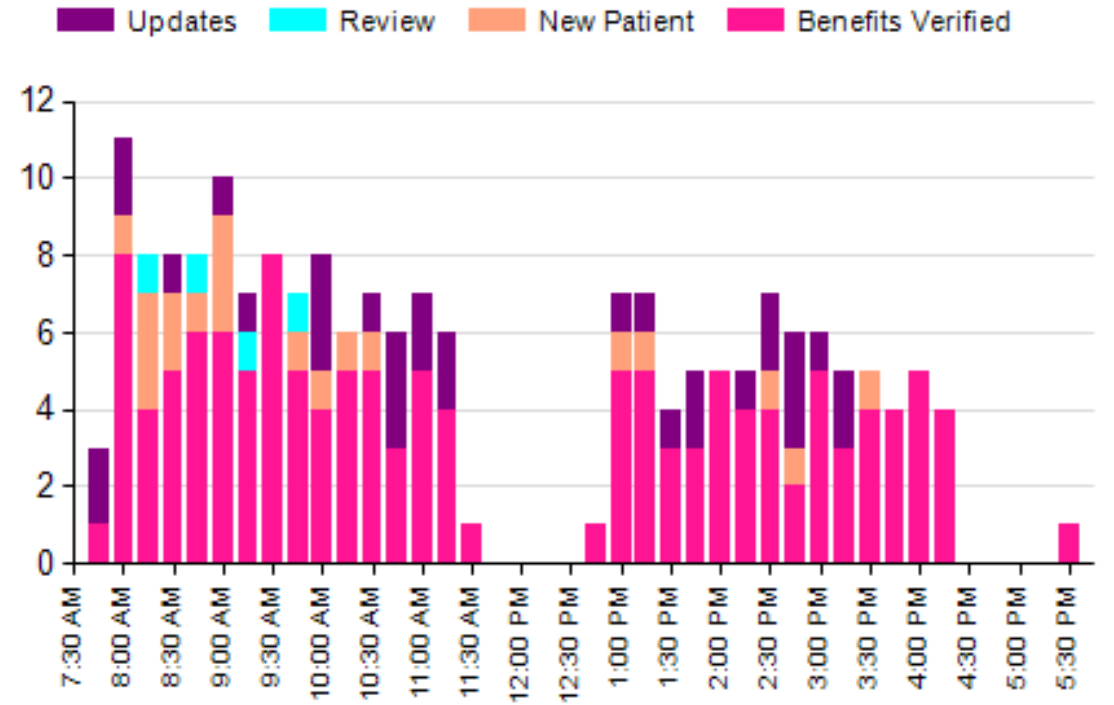
DOS	Acct Num	Patient	Provider	Facility	Primary Insurance	Appt Scheduled By	Appt Created Date
4/6/2022				Surg Sched	HIP MDWise Excel Network 17993 MCD		2/16/2022

Tomorrow's Appointments

North Tomorrow Appointments



Clinton Tomorrow Appointments

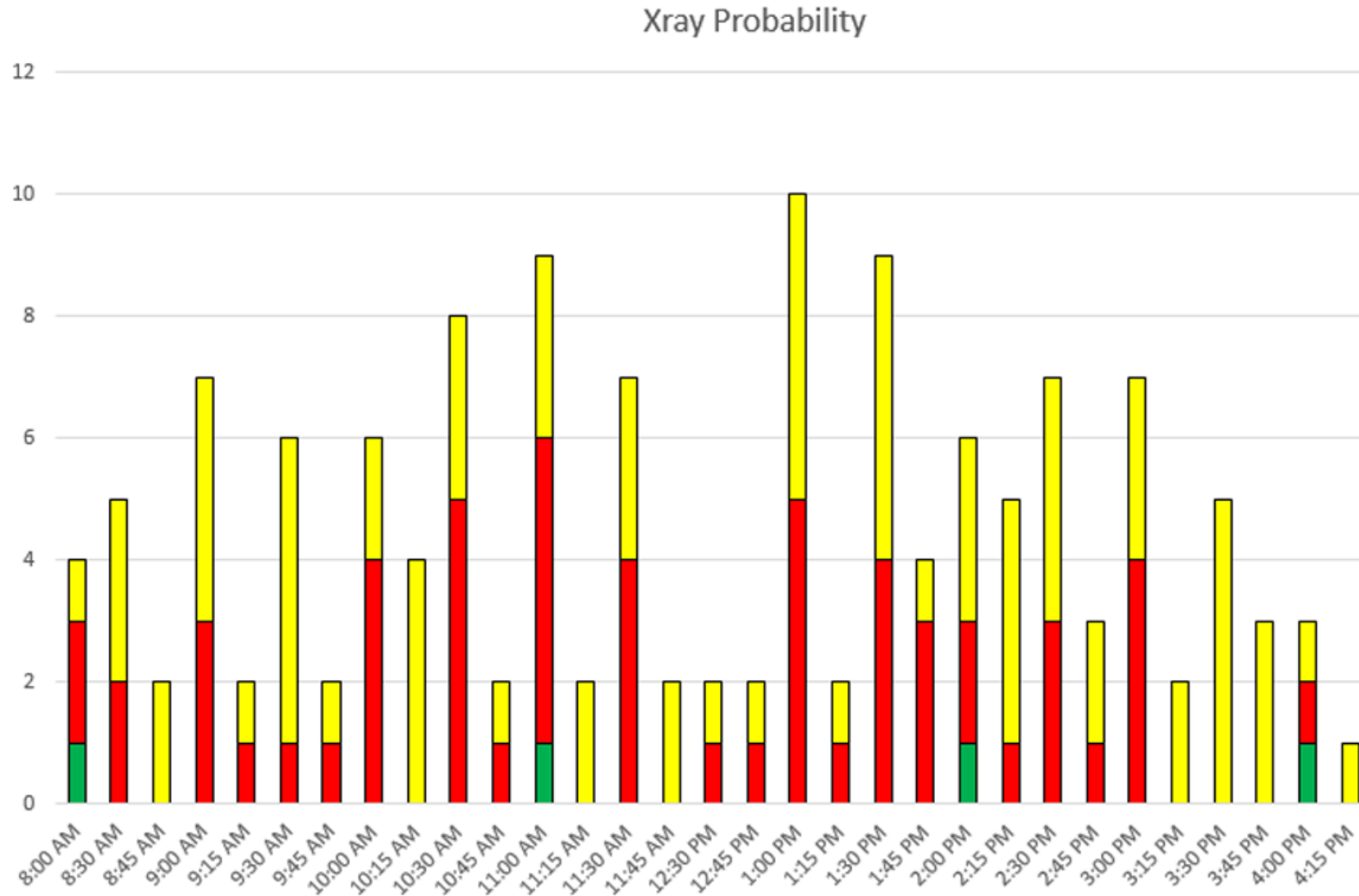


Who is Coming in Today and Tomorrow

Appointment Summary

	Today		Tomorrow	
Facility	AM	PM	AM	PM
	82	94	97	121
	13	14	28	30
	14	14	20	25
	7	13	12	16
Total	116	135	157	192

Will the Patient Need an X-Ray Today?



If you could see the future, what
would your practice do differently?

Appointment Utilization

Provider	(All)	▼	
Years	(All)	▼	
Months	(All)	▼	
StartTime	(All)	▼	
Count of Template Start		Column Labels	▼
Row Labels	▼	Y	N
		3.76%	96.24%
		100.00%	0.00%
		57.49%	42.51%
		48.16%	51.84%
		41.94%	58.06%
		17.71%	82.29%
		40.49%	59.51%
		100.00%	0.00%
		61.01%	38.99%
		100.00%	0.00%
		100.00%	0.00%
		35.63%	64.37%
		58.83%	41.17%
		61.95%	38.05%
		54.59%	45.41%
		66.22%	33.78%
		100.00%	0.00%

Are Patients Being Roomed on Time?

Doctor	(All)	▼			
Appt Hour	(All)	▼			
Appt Type	(All)	▼			
Appt Weekday	(All)	▼			
Facility	(All)	▼			
Count of Patient	Column Labels	↕			
	Arrived on Time			Arrived on Time Total	Arrived Late
Row Labels	Roomed on Time	Roomed Late			Roomed Late
2021					
Sep	29.31%	55.76%		85.07%	14.93%
Oct	25.35%	60.65%		86.00%	14.00%
Nov	29.92%	52.91%		82.83%	17.17%
Dec	36.80%	47.78%		84.58%	15.42%
2022					
Jan	34.67%	51.30%		85.97%	14.03%
Feb	34.55%	51.25%		85.80%	14.20%
Mar	33.06%	53.06%		86.12%	13.88%
Grand Total	32.90%	52.23%		85.13%	14.87%

Front Desk Collections

Yesterday's Front Desk Collections

Appt Date	Acct	Provider	Appt Type	Primary Ins Group	Copay Collected	Copay To Collect	%	Pt Pmt Collected	Pt Pmt To Collect	%
						\$0.00			\$178.90	0%
3:30 PM	80954		OV - 15	Aetna		\$0.00			\$178.90	0%
					\$260.00	\$330.00	79%	\$21.03	\$11,863.14	0%
8:00 AM	76171			United Healthcare		\$50.00	0%		\$0.00	
8:30 AM	94839		CKUP - 30	BCBS	\$30.00	\$30.00	100%		\$0.00	
9:00 AM	84903		OV - 15	United Healthcare		\$0.00			\$121.92	0%
9:45 AM	97994		OV - 15	Aetna	\$15.00	\$30.00	50%		\$0.00	
10:30 AM	100282			BCBS		\$30.00	0%		\$0.00	
10:45 AM	81478		OV - 15	Medicare		\$0.00			\$11,690.19	0%
12:30 PM	95534		OV - 30	HMO	\$50.00	\$50.00	100%		\$0.00	
1:00 PM	34270		OV - 15	PacifiCare SecureHorizons	\$50.00	\$50.00	100%		\$0.00	
1:15 PM	100953			CIGNA	\$60.00	\$30.00	200%		\$30.00	0%
2:00 PM	41694		OV - 15	BCBS	\$20.00					
2:00 PM	97399			United Healthcare		\$0.00		\$21.03	\$21.03	100%
3:45 PM	43836		OV - 15	BCBS	\$35.00	\$60.00	58%		\$0.00	



Appointment Template Utilization

Facility		(All)																					
Appt Type		(All)																					
Count of Resource		Column Labels																					
		3/16/2020 - 3/22/2020		3/16/2020 - 3/22/2020		3/23/2020 - 3/29/2020		3/23/2020 - 3/29/2020		3/30/2020 - 4/5/2020		3/30/2020 - 4/5/2020		4/6/2020 - 4/12/2020		4/6/2020 - 4/12/2020		4/13/2020 - 4/17/2020		4/13/2020 - 4/17/2020		Grand Total	
Row Labels	Filled	Not Filled	Total	Filled	Not Filled	Total	Filled	Not Filled	Total	Filled	Not Filled	Total	Filled	Not Filled	Total	Filled	Not Filled	Total	Grand Total				
Specialty A	266	167	433	124	79	203	63	25	88	78	33	111	78	112	190	1,025							
Specialty B	268	107	375	82	10	92				63	2	65	41	27	68	600							
Specialty C	312	226	538	117	73	190	74	81	155	164	79	243	116	128	244	1,370							
Specialty D	285	275	560	83	154	237	36	32	68	59	212	271	41	278	319	1,455							
Specialty E	330	242	572	184	106	290	132	70	202	152	225	377	139	246	385	1,826							
Specialty F	141	150	291	56	62	118	42	30	72	39	74	113	15	195	210	804							
Specialty G	112	46	158	106	50	156	63	8	71	55	8	63	103	56	159	607							
Jones	24	18	42	25	17	42	19		19	16	1	17	19	17	36	156							
Young				8	1	9	7	2	9	5		5			23								
Taylor	46	9	55	20	5	25				24	7	31	20	4	24	135							
Monson	7	5	12	6	4	10	12		12				11		11	45							
Hinckley	29	10	39	38	21	59	18	6	24				43	35	78	200							
Nelson	6	4	10	9	2	11	7		7	10		10	10		10	48							
Grand Total	1,714	1,213	2,927	752	534	1,286	410	246	656	610	633	1,243	533	1,042	1,575	7,687							



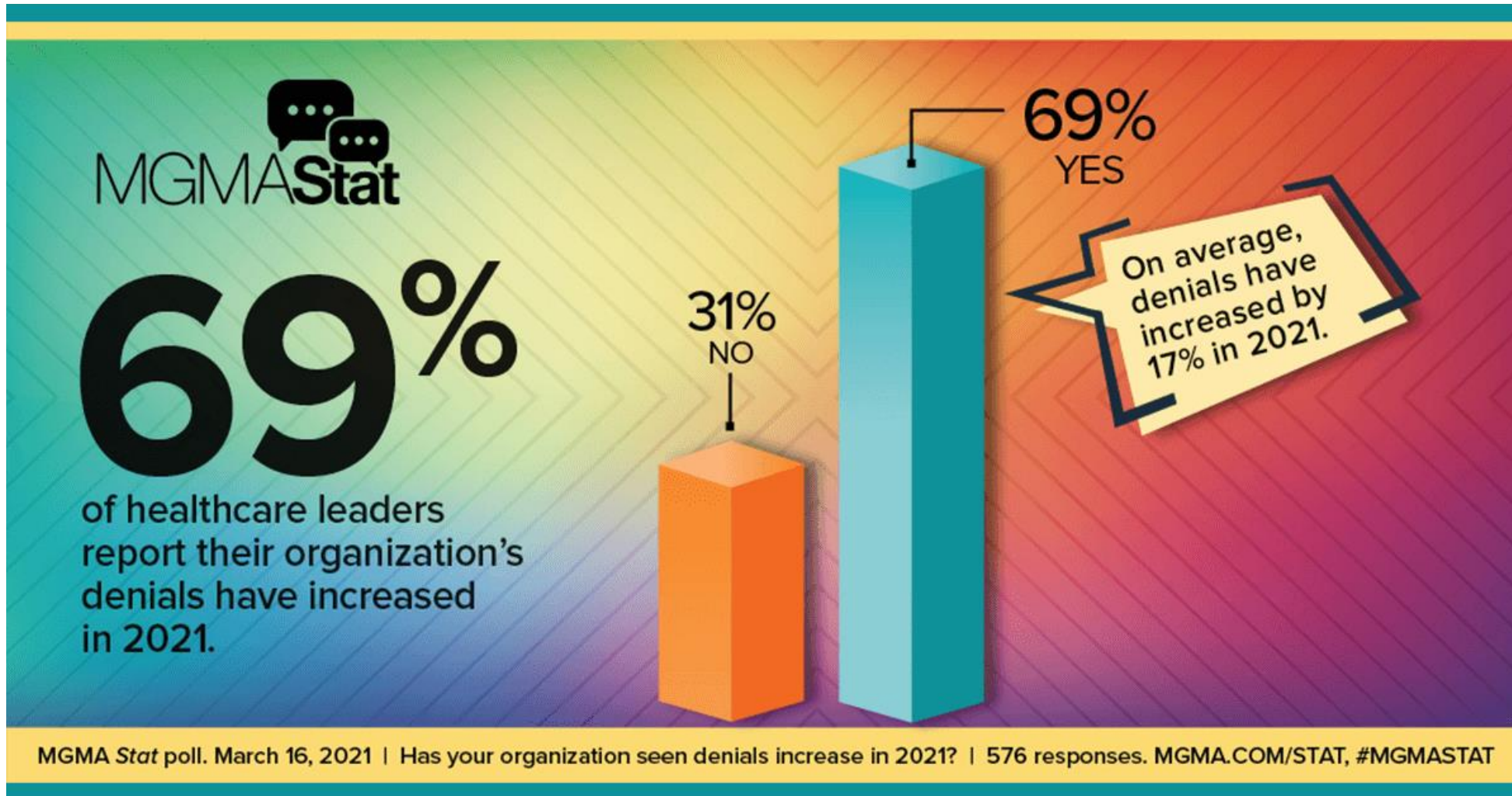
Customized Claim Scrubber

4289507	Patients Listed Here	Medicaid 1001	IP Only Codes
4289509		Medicaid 1001	IP Only Codes
4288645		Medicare Managed Care 1019	BPCI Surgery with No Care Plan
4289453		Medicare Managed Care 1019	Hospitalization date Required for POS 21
4289453		Medicare Managed Care 1019	Scheduling Location
4289524		PHP 1116	SpineArt Participants
4282905		Medicare 1000	BPCI Add 1123F or 1124F Care Plan
4283620		Medicare Managed Care 1019	BPCI Add 1123F or 1124F Care Plan
4287560		Anthem/BCBS 1103	SpineArt Participants
4289505		Signature Care 1115	Missing Resource Field
4289514		HIP 1132	New Pt. vs. Est. Pt. Visit
4285113		Anthem/BCBS 1103	\$0.00 Charge Line

Customized Claim Scrubber

Ticket Number	ICERule	Rule Category
LBS373973	Midlevel Rendering Spec 34	
VVL016430	HMO Z Code Primary Dx	
VVL016433	Telehealth POS 11	
VVL016435	Telehealth POS 11	
LBS374018	Modifier 25 can only be on Codes Beginning with 99	
LBS374107	96372 Needs 59 Modifier	
LBS374110	Cannot Bill New Patient Code	
CL250224	Diagnosis Code Pointers	Rejections
CL250224	Diagnosis Code Pointers	Rejections
CL250227	Consult Cannot be Billed to this Insurance	Staff
CL250227	Consult Codes Cannot have Physician as Referring	Staff
CL250240	Modifier 25 Must be used on these Codes	
CL250240	Ins Group or ID with Special Characters	
CL250302	Midlevel Rendering Spec 34	
ELO054082	Global Period	
LBS373943	81003 Referring Provider Must be Provider	Staff
CL250160	Cannot Bill New Patient Code	

Denials are Going Up



**Text
EXCEL to
33550 to
Join**



Compare Mode to Average Allowed

CPT Code	Mod1	Mod2	Insurance 1	Average of CPT Count	Average of Charges	Average of Mode Charges	Average of Allowed	Average of Mode Allowed
				3,869	\$10.00	\$10.00	\$3.85	\$1.56
				6,309	\$199.00	\$199.00	\$134.76	\$106.33
				5,310	\$199.00	\$199.00	\$105.42	\$126.88
				4,040	\$199.00	\$199.00	\$55.43	\$149.24
				3,617	\$197.97	\$199.00	\$92.73	\$161.28
				3,039	\$199.00	\$199.00	\$106.54	\$106.33
				1,878	\$199.00	\$199.00	\$104.84	\$106.33
				1,803	\$199.00	\$199.00	\$112.48	\$125.84
				1,526	\$199.00	\$199.00	\$54.10	\$161.28
				1,379	\$199.00	\$199.00	\$137.29	\$144.03
				1,376	\$199.00	\$199.00	\$107.93	\$112.39
				1,333	\$199.00	\$199.00	\$103.33	\$126.88
				1,116	\$199.00	\$199.00	\$95.41	\$106.33
				1,052	\$199.00	\$199.00	\$135.67	\$95.21
				725	\$199.00	\$199.00	\$131.37	\$144.03
				614	\$199.00	\$199.00	\$29.47	\$149.24
				579	\$199.00	\$199.00	\$95.53	\$106.33
				551	\$199.00	\$199.00	\$105.85	\$126.88
				538	\$199.00	\$199.00	\$127.51	\$154.01

Track Denial Codes

Reimb RARC Abbreviation	Reimb RARC Description	Sum of Amount
CO-45	CO - Charges exceed contracted/ legislated fee arrangement	\$34,526,158.85
OA-23	The impact of prior payer(s) adjudication including payments and/or adjustments.	\$1,340,333.70
CO-59	CO-charges adj based on multiple proc rules	\$750,329.11
PI-59	PI-59	\$322,832.02
CO-96	CO- Non-covered charge(s).	\$100,672.41
OA-18	Exact duplicate claim/service	\$53,312.12
OA-45	OA - Charges exceed contracted/ legislated fee arrangement.	\$44,454.90
CO-50	CO- non covd service bc this is not deemed medical necessity by the payer	\$29,839.44
CO-97	CO-PAYMENT INCLUDED IN THE ALLOWANCE FOR ANOTHER SERVICE PROCEDURE ON SAME DATE	\$27,019.89
CO-29	The time limit for filing has expired.	\$26,282.00
CO-252	CO-An attachment/other documentation is required to adjudicate this claim.	\$21,472.60
CO-197	CO - PAYMENT ADJUSTED FOR ABSENCE OF PRECERIFICATION/AUTHORIZATION.	\$20,819.58
PR-200	PR-200	\$15,701.32
PR-27	PR- Expenses incurred after coverage terminated.	\$9,771.48
PR-204	This service/equipment/drug is not covered under the patient's current benefit p	\$7,733.65
PI-204	PI-204	\$6,244.77
OA-193	Original payment decision is being maintained. Upon review, it was determined th	\$5,279.22
PR-227	Information requested from the patient/insured/responsible party was not provid	\$5,213.64
CO-4	CO-4	\$4,832.00
CO-253	Sequestration reduction	\$4,824.38
PR-51	PR-preexisting condition	\$3,935.50
PR-23	The impact of prior payer(s) adjudication including payments and/or adjustments.	\$3,828.84
PI-226	Information requested from the Billing/Rendering Provider was not provided or no	\$3,000.00



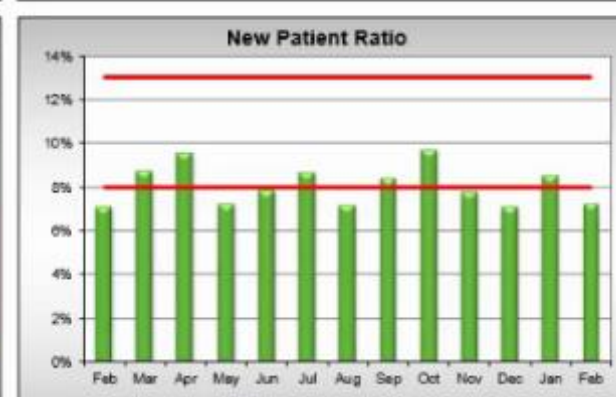
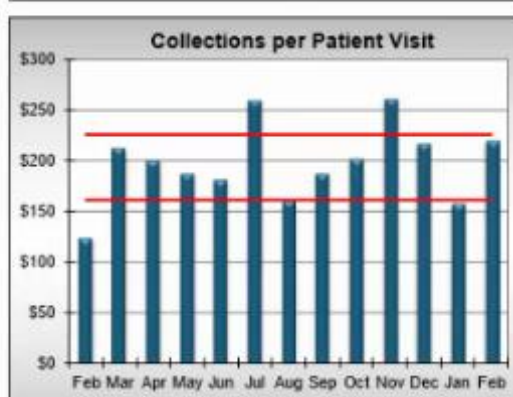
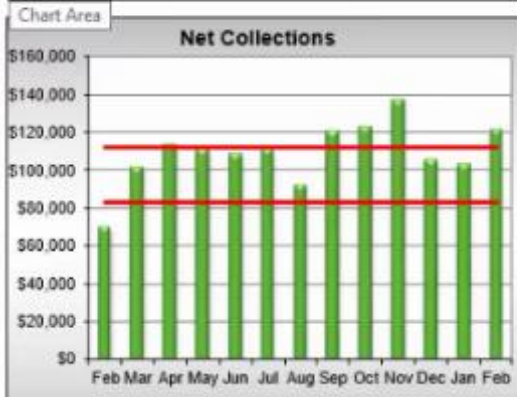
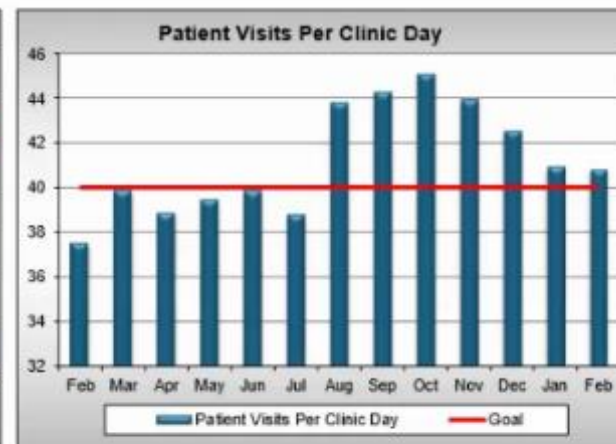
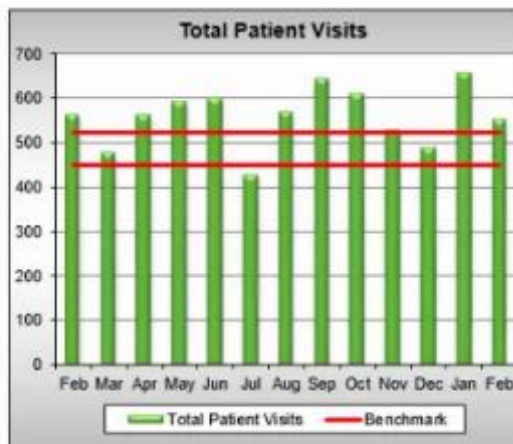
Trend Adjustment Codes

Month Adjustments			CalendarYea	CalendarMon
			+ 2019	+ 2020
Adjustment Group Code	Adjustment Reason Code	CARC Description		
CO	45	Charge exceeds fee schedule/maximum allowable or contracted/legislated fee arrangement.	\$17,643,967	\$22,802,628
CO	96	Non-covered charge(s).	\$4,182,415	\$7,001,385
CO	4	The procedure code is inconsistent with the modifier used.	\$803,710	\$1,939,378
CO	253	Sequestration - reduction in federal payment	\$878,202	\$514,140
CO	16	Claim/service lacks information or has submission/billing error(s).	\$158,678	\$678,179
CO	97	The benefit for this service is included in the payment/allowance for another service/procedure that has already been ac	\$365,429	\$418,379
CO	5	The procedure code/type of bill is inconsistent with the place of service.	\$316,929	\$397,598
CO	A1	Claim/Service denied.	\$299,705	\$362,568
CO	151	Payment adjusted because the payer deems the information submitted does not support this many/frequency of service	\$221,476	\$332,777
CO	18	Exact duplicate claim/service	\$118,330	\$450,192
CO	256	Service not payable per managed care contract.	\$216,074	\$271,251
CO	234	This procedure is not paid separately.	\$241,907	\$249,868
CO	222	Exceeds the contracted maximum number of hours/days/units by this provider for this period.	\$159,347	\$259,341
CO	29	The time limit for filing has expired.	\$298,692	\$116,842
CO	22	This care may be covered by another payer per coordination of benefits.	\$170,733	\$202,495
CO	252	An attachment/other documentation is required to adjudicate this claim/service.	\$36,138	\$213,580
CO	231	Mutually exclusive procedures cannot be done in the same day/setting.	\$5,520	\$234,666
CO	109	Claim/service not covered by this payer/contractor. You must send the claim/service to the correct payer/contractor.	\$75,056	\$160,059
CO	197	Precertification/authorization/notification/pre-treatment absent.	\$114,464	\$106,881
CO	131	Claim specific negotiated discount.	\$91,826	\$115,349
CO	119	Benefit maximum for this time period or occurrence has been reached.	\$58,090	\$83,543
CO	24	Charges are covered under a capitation agreement/managed care plan.	\$46,383	\$106,198
CO	236	This procedure or procedure/modifier combination is not compatible with another procedure or procedure/modifier cor	\$80,787	\$63,119
CO	170	Payment is denied when performed/billed by this type of provider.	\$70,949	\$56,009

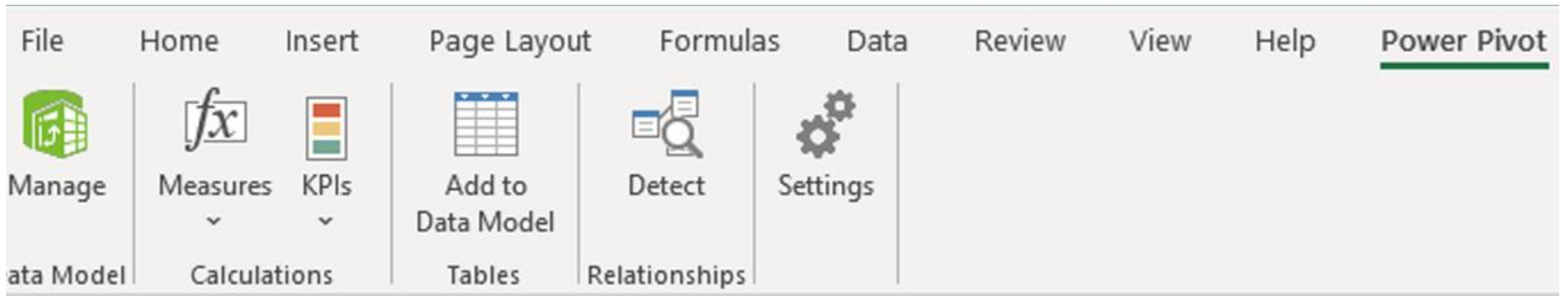
What has been effective for your practice in recouping denials and underpayments?

Excel Dashboard Based on Pivot Tables

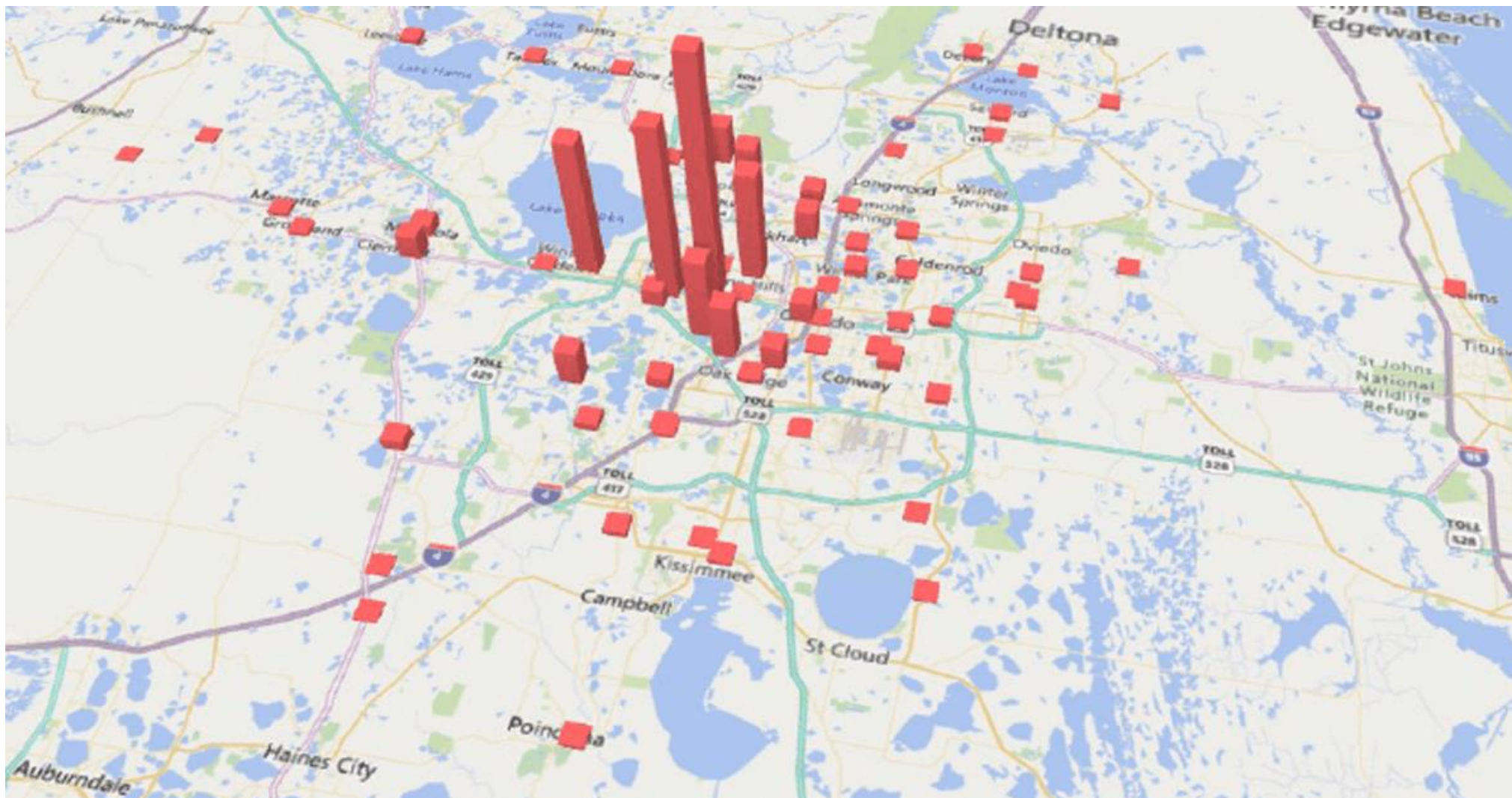
Clinical Summary													13 Months Ending Feb 2020	
	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Averages
Clinic Days Worked	15.0	12.0	14.5	15.0	15.0	11.0	13.0	14.5	13.5	12.0	11.5	16.0	13.5	13.6
Total Patient Visits	553	478	553	592	598	427	569	642	608	527	489	655	551	559
Patient Visits Per Clinic Day	38	40	39	39	40	39	44	44	45	44	43	41	41	41
Charges	\$202,539	\$152,772	\$224,790	\$210,504	\$225,132	\$155,193	\$237,464	\$225,949	\$229,002	\$241,135	\$168,438	\$286,698	\$262,223	\$217,065
Net Collections	\$69,836	\$101,470	\$113,037	\$111,073	\$108,710	\$111,002	\$91,737	\$120,120	\$123,145	\$137,343	\$105,809	\$103,282	\$121,346	\$109,070
Average Collections Per Visit	\$124	\$212	\$201	\$188	\$182	\$260	\$161	\$187	\$203	\$261	\$216	\$158	\$220	\$198
New Patients	40	42	54	43	47	37	41	54	59	41	35	56	40	45
New Patient Ratio	7%	9%	10%	7%	8%	9%	7%	8%	10%	8%	7%	9%	7%	8%



Try Power Pivot



Excel 3D Maps



Have you mapped any of your
practice data?

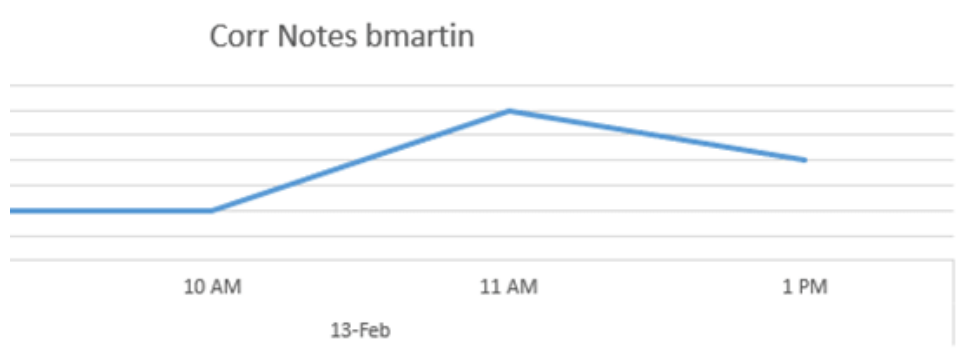
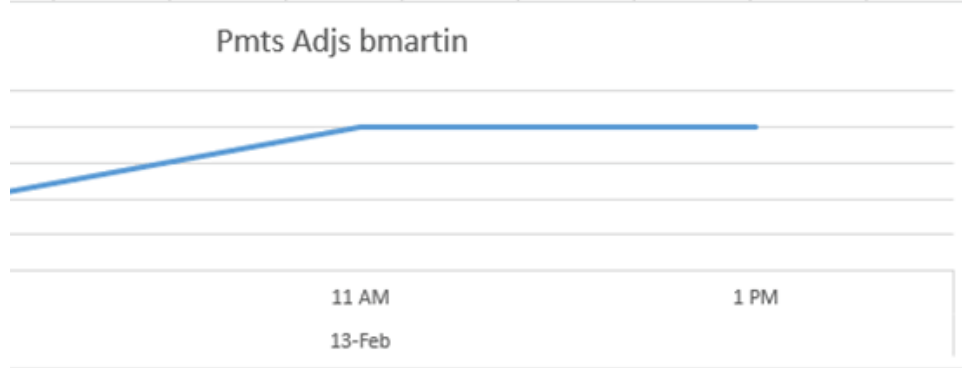
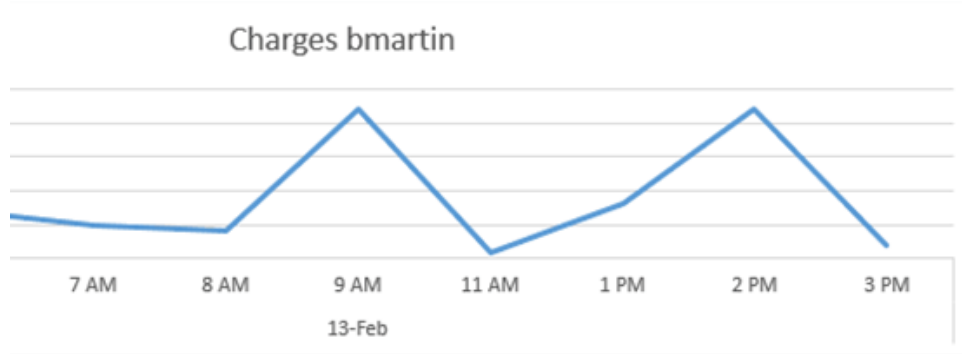
Challenge Billing Assumptions

Provider Specialty	(Multiple Items)	↓	
Mod1	(Multiple Items)	↓	
Date Svc From	(Multiple Items)	↓	
Plan Class	(All)	↓	
Row Labels	↓	Sum of Amount Charge	Sum of Std Fee
⊕ 29823		\$253,797.00	\$307,800.00
⊕ 27130		\$65,246.00	\$75,000.00
⊕ 64999		\$60,000.00	\$36,000.00
⊕ 29828		\$55,499.00	\$67,500.00
⊕ 22633		\$49,998.00	\$50,000.00
⊕ 99214		\$42,761.00	\$26,200.00

Payer Contracting Data

Top CPT Codes	Yes	<input type="button" value="v"/>			
Top Payers	Yes	<input type="button" value="v"/>			
Row Labels	<input type="button" value="v"/>	Sum of Charge	Sum of Units	Sum of Avg Allowed	Sum of % Allowed
<input type="checkbox"/> 99213		\$1,145,400	11,454	\$75.49	75.5%
		\$348,200	3,482	\$75.39	75.4%
		\$166,300	1,663	\$77.24	77.2%
		\$136,000	1,360	\$76.82	76.8%
		\$83,200	832	\$77.29	77.3%
		\$64,900	649	\$76.62	76.6%
		\$63,300	633	\$72.17	72.2%
		\$50,300	503	\$75.19	75.2%
		\$36,900	369	\$84.06	84.1%
		\$27,900	279	\$71.46	71.5%
		\$27,500	275	\$76.31	76.3%
		\$22,200	222	\$73.94	73.9%
		\$19,600	196	\$65.58	65.6%

Billing Office Productivity



CreatedBy

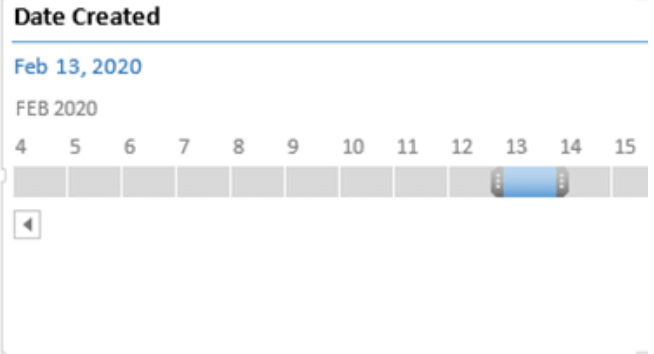
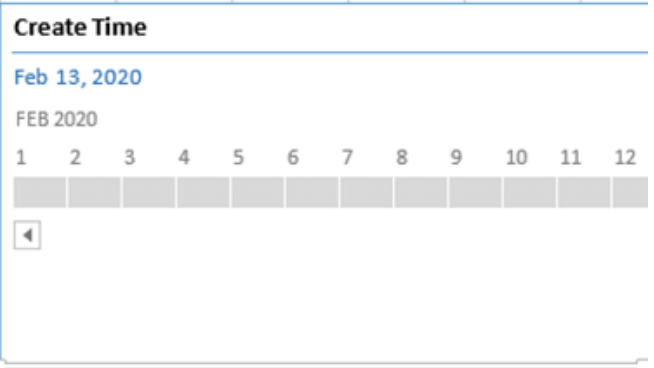
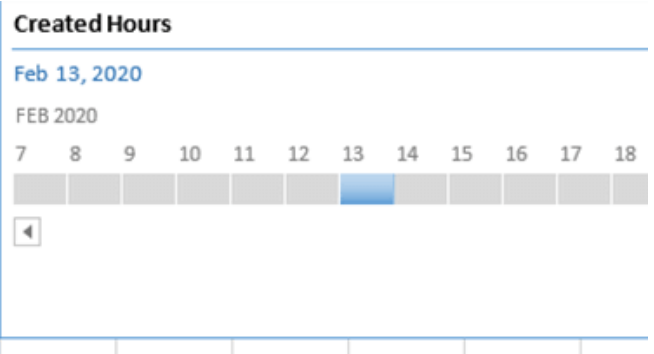
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chughes	creamer
csaine	dmiller
hmax...	jtackett
kgillis	rtill
scottrell	tsyndr...

CreatedBy

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chughes	creamer
csaine	dmiller
hmax...	jtackett
kgillis	meddy
rtill	scottrell

Created By

aherm...	bmartin
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kgillis	meddy
rtill	scottrell



Trend Patient A/R

Patient A/R History as of 1/14/2022

Category	This Week		Last Week		Last Month	
Balance Over 12 Months	215	\$40,507	214	\$41,105	214	\$39,745
No Statement in 2 Months	23	\$4,874	24	\$4,895	24	\$4,909
Balance Over \$2,000	147	\$641,958	160	\$685,658	147	\$638,523
Total Patient A/R	7,801	\$2,315,427	7,841	\$2,363,988	7,882	\$2,297,124

Balance Over 12 Months

Acct Num	Last Name	Pat Balance
Patient Names and Account Numbers Here		\$2,358.21
		\$1,759.73
		\$1,657.00
		\$1,625.39
		\$1,610.69

No Statement in 2 Months

Acct Num	Last Name	Pat Balance
Patient Names and Account Numbers Here		\$2,615.34
		\$328.00
		\$307.98
		\$287.00

Balance Over \$2,000

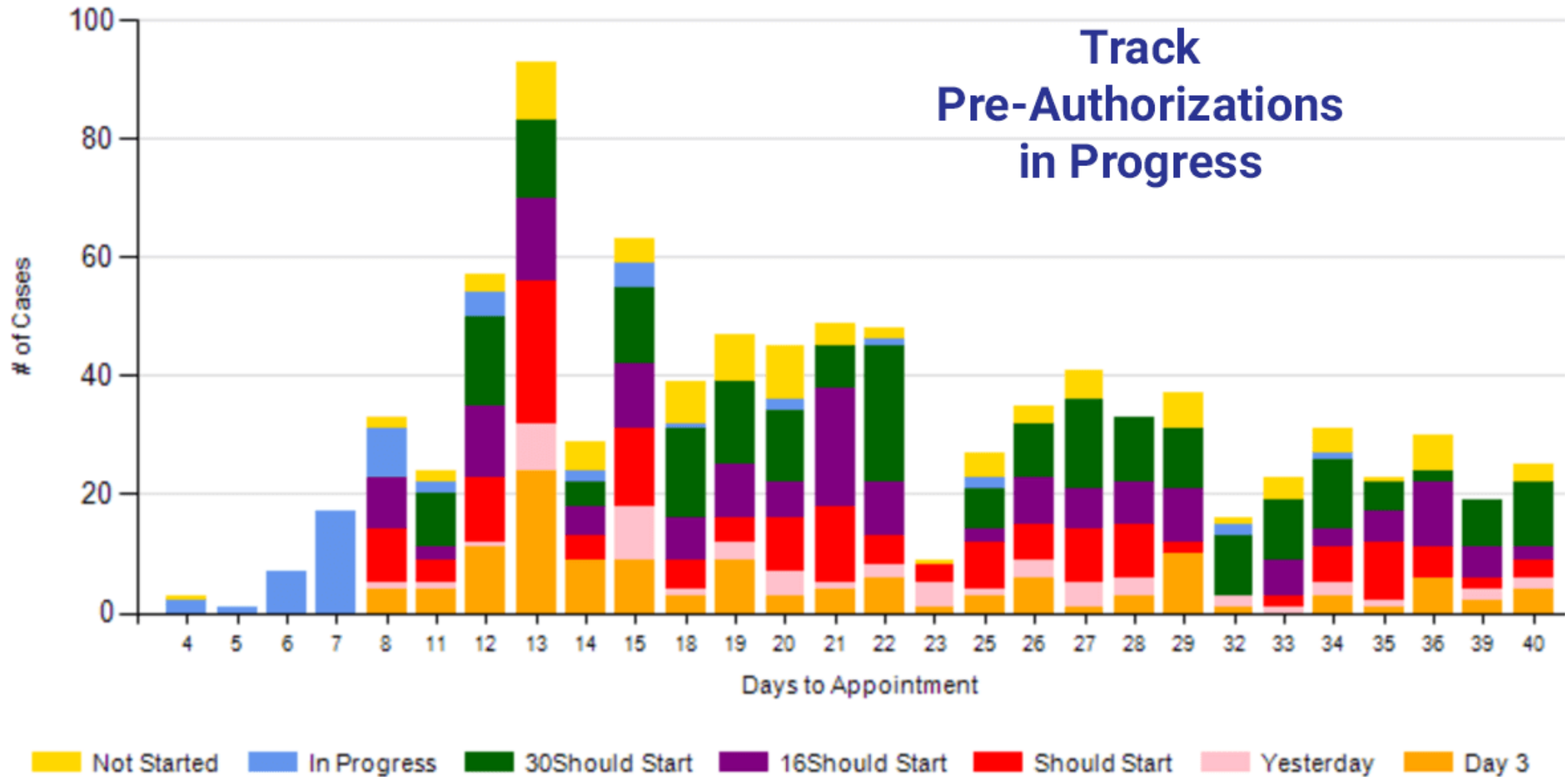
Acct Num	Last Name	Pat Balance
Patient Names and Account Numbers Here		\$27,946.00
		\$17,971.00
		\$16,018.00
		\$14,847.10
		\$13,174.97

Track Patient A/R

	Acct Num	Patient Name	Pat Balance	LastPaymentDate	LastPaymentAmount	Last Patient Responsible Date
1			4450.04	2020-05-05 00:00:00.000	135.39	2020-07-24 00:00:00.000
2			3127.00	2020-02-14 00:00:00.000	74.33	2020-07-16 00:00:00.000
3			1825.37	2020-06-08 00:00:00.000	100.00	2020-08-05 00:00:00.000
4			955.47	2020-08-11 00:00:00.000	148.49	2020-08-07 00:00:00.000
5			5199.00	2020-07-24 00:00:00.000	25.27	2020-07-28 00:00:00.000
6			628.00	2020-03-13 00:00:00.000	30.00	2020-07-17 00:00:00.000
7			445.91	2020-07-24 00:00:00.000	30.00	2020-07-13 00:00:00.000
8			823.26	2020-02-20 00:00:00.000	100.00	2020-08-12 00:00:00.000
9			780.29	2020-03-17 00:00:00.000	112.00	2019-08-13 00:00:00.000
10			888.95	2020-08-04 00:00:00.000	109.20	2020-08-04 00:00:00.000
11			504.52	2020-08-05 00:00:00.000	145.14	2020-06-12 00:00:00.000
12			685.15	2020-05-19 00:00:00.000	30.00	2020-06-29 00:00:00.000
13			611.91	2020-06-09 00:00:00.000	120.00	2020-07-17 00:00:00.000
14			490.39	2020-03-23 00:00:00.000	62.00	2019-09-27 00:00:00.000
15			535.57	2019-11-22 00:00:00.000	131.07	2020-02-18 00:00:00.000
16			638.89	2020-07-28 00:00:00.000	0.01	2020-06-05 00:00:00.000
17			1962.07	2017-06-09 00:00:00.000	146.23	2020-08-11 00:00:00.000
18			557.03	2020-08-03 00:00:00.000	74.22	2020-07-30 00:00:00.000

- Patients not on a payment plan
- No payment in 30 days
- No new patient balances in 30 days
- Overall balance over \$250

Track Pre-Authorizations



Find Missing Revenue by Minding the Gaps

LRH Encounter	Prefix	Year	Case Number	Patient	Magic	Column1
41149150	AU	21	3		Missing Case Number AU-21-1 & AU-21-3	2
40973215	BM	21	10		Missing Case Number BM-21-8 & BM-21-10	2
40976137	BM	21	12		Missing Case Number BM-21-10 & BM-21-12	2
40976475	BM	21	14		Missing Case Number BM-21-12 & BM-21-14	2
40987962	BM	21	17		Missing Case Number BM-21-14 & BM-21-17	3
40977019	BM	21	20		Missing Case Number BM-21-18 & BM-21-20	2
40990300	BM	21	22		Missing Case Number BM-21-20 & BM-21-22	2
40988791	BM	21	27		Missing Case Number BM-21-25 & BM-21-27	2
40994488	BM	21	31		Missing Case Number BM-21-29 & BM-21-31	2
41001550	BM	21	34		Missing Case Number BM-21-31 & BM-21-34	3
40992775	BM	21	39		Missing Case Number BM-21-37 & BM-21-39	2
41005090	BM	21	42		Missing Case Number BM-21-39 & BM-21-42	3
41015869	BM	21	46		Missing Case Number BM-21-44 & BM-21-46	2
41020870	BM	21	49		Missing Case Number BM-21-47 & BM-21-49	2
41025686	BM	21	57		Missing Case Number BM-21-53 & BM-21-57	4
41001550	BM	21	61		Missing Case Number BM-21-58 & BM-21-61	3
40954335	BM	21	68		Missing Case Number BM-21-66 & BM-21-68	2
41044844	BM	21	75		Missing Case Number BM-21-73 & BM-21-75	2
41045941	BM	21	77		Missing Case Number BM-21-75 & BM-21-77	2
41043684	BM	21	79		Missing Case Number BM-21-77 & BM-21-79	2
41047684	BM	21	84		Missing Case Number BM-21-79 & BM-21-84	5
41020870	BM	21	88		Missing Case Number BM-21-86 & BM-21-88	2
41058406	BM	21	102		Missing Case Number BM-21-100 & BM-21-102	2
41012084	BM	21	106		Missing Case Number BM-21-104 & BM-21-106	2

Provider Loyalty and Location Loyalty

PROVIDER LOYALTY

Patient seen in the current year or prior 5 years

Row Labels	Sum of SameProvider	Sum of DifferentProvider	Sum of %
Provider 1	3,648	721	83.5%
Team A	52,772	13,056	80.2%
Team B	38,714	10,050	79.4%
Provider 2	3,114	1,674	65.0%
Provider 3	8,573	3,897	68.7%
Provider 4	16,047	7,494	68.2%
Team C	45,657	10,618	81.1%
Grand Total	168,525	47,510	78.0%

LOCATION LOYALTY

Patient seen in the current year or prior 2 years

Row Labels	Sum of SameLocation	Sum of DifferentLocation	Sum of %
	18,939	12,309	60.6%
	22,692	7,273	75.7%
	35,837	10,531	77.3%
Grand Total	77,468	30,113	72.0%

Open Surgery Slots

Start Time	Minutes	Category	AM PM	Slots
3/19/2020 7:00 AM - 12:00 PM	300	Half Day	AM	1
3/24/2020 8:00 AM - 10:15 AM	135	90 - 180 Minutes	AM	1
4/8/2020 7:30 AM - 10:30 AM	180	90 - 180 Minutes	AM	1
4/16/2020 7:00 AM - 10:00 AM	180	90 - 180 Minutes	AM	1
4/24/2020 7:30 AM - 12:00 PM	270	AM and PM on Same Day	AM	1
4/24/2020 1:00 PM - 5:00 PM	240	AM and PM on Same Day	PM	1
5/7/2020 7:30 AM - 12:00 PM	270	AM and PM on Same Day	AM	1
5/7/2020 1:00 PM - 5:00 PM	240	AM and PM on Same Day	PM	1
5/8/2020 1:00 PM - 5:00 PM	240	Half Day	PM	1
5/14/2020 7:00 AM - 10:00 AM	180	AM and PM on Same Day	AM	1
5/14/2020 1:00 PM - 5:00 PM	240	AM and PM on Same Day	PM	1

What should your practice
management system be telling you?

A photograph of a sunset over the ocean. The sun is a bright yellow-orange orb in the center of the sky, with a large, glowing halo. The sky transitions from a pale yellow at the top to a deep orange near the horizon. A thin layer of dark clouds is visible just above the water. The ocean is dark blue-grey with small, choppy waves. A semi-transparent yellow rectangular box with a thin dark border is centered in the lower half of the image, containing text.

Nate Moore, CPA, MBA, FACMPE
Weekly Podcasts at
mooresolutionsinc.com