



Intro Unit Course Work

If you find yourself unable to get the data, we are requesting from your practice management software, it is perfectly fine. You are welcome to list the insurance plans you participate with, then use your very best guesstimate on how many patients have each plan, the total dollars last year you collected from each plan, and take a good guess at what you wrote off last year for each plan.



✓ Total # of Patients who are Connected to each Insurance Company

To get a list of Patients connected to each of the Insurance Companies from the list above, **go to Reports > Patients by Insurance Companies.**

This will generate a list of Patients grouped together by the Insurance Companies from the Insurance Company report. **Note: There is no count for each group.**

The easiest way to get the count is to export the list to Microsoft Excel and use the Count feature. **To Export to Excel:** When you generate the Patients by Insurance Company report and you get to the preview screen of the report, right-click on the report and select Save Data As. Change the Save as Type to Microsoft Excel File (*.xls). Enter a unique File Name. Change the Save In to Desktop so the report can be easily retrieved from your desktop. Now close out the report and navigate to your desktop.



Please do not let this step hold you up!

Do the best you can and submit your numbers.



Open your newly created file in Excel.

When it's open, scroll over to the column with the header "coverage". Highlight the column and select the Sort & Filter icon on the toolbar. Select the Filter option. **With the Filter option selected** you can use the "down arrow" next to the column title "coverage" and you can filter down to a particular Insurance Company (if there are duplicates you can select multiples). **The count for number of patients will be visible in the lower left of the Excel window.**

Total collected (\$'s) last year from each Insurance Company

This report is only available for the **CURRENT Month-to-Date and Year-to-Date** using the Insurance Company Productivity report. I have advised the office to generate this report as part of their End of Year reporting and it may be possible that the previous year's report is stored in **List > Practice Information > SmartDoc**. If not, the office can reach out to the Patterson Technology Center ("Support") to aid in retrieving this information if they are on a support contract. If the office is not on a support contract with EagleSoft, they can reach out to me, and I should be able to extract that data. There is no user-level option to retrieve the previous year's data.

Total write-offs (\$'s) in 2021 from each Insurance Company

To get the total dollars written off for a prior year, retrieval will depend on the process the office uses to "write off" the difference between the office Standard Fee and the insurance allowances.

- If the office is using Fee Schedules and/or Coverage Books, the best method is to go to Reports> Managed Care Utilization by Ins Co report for the Prior year date range. This report shows the total Standard Fee and the total adjusted fee charged. The office will have to subtract the adjusted fee from the standard fee to get the Adjustment amount.
- If the office uses an Adjustment Type for each insurance company (i.e. Delta Adjustment, MetLife Adjustment, etc) they can go to the Adjustment by Type report to find the totals adjusted for each Insurance Company.
- If the office does a write-off at the time of the Explanation of Benefits (EOB) posting with a "generic" insurance Adjustment there may be no way to separate adjustments by the insurance company. You can generate an Adjustment by Type report but there will only be a generic total.