



Basic Questions & The Reports That Answer Them

Akamai PM has a tremendous amount of innate reporting capability. However, at times, it can be confusing which report gets you the quick answer you need. Following is a list of commonly asked questions and where you can turn for answers.

Question	Date Type	Which Report	Comments
Collections			
How much money was collected last month and who paid it?	Accounting Dates	Payments Summarized by Classification (PRAR)	Don't filter Payment Entry dates
How much was deposited into the bank each day? And what do I base my GET return on?	Deposit Dates	Daily Deposit Summary List or Daily Deposit Summary Table (DTR)	Also an excellent tool to use to reconcile the monthly bank statement.
How much did each doctor in my practice collect last month?	Accounting Dates	Payments Summarized by Billing Provider (PRAR)	Don't filter Payment Entry dates
How does this compare with prior months?	Accounting Dates	Monthly Transaction Summary (PRA)	
Charges			
What did we do last month?	Dates of Service	Total Procedure Code Activity (PAR)	
How much was entered into the computer last month?	Accounting Dates	Charge Summary (CRAR) or Procedure Code Summary (PRA)	
How do my charges compare with prior months?	Accounting Dates	Monthly Transaction Summary (PRA)	
What percentage of my charges are getting paid? How close am I to collecting all that is owed to me?	Accounting Dates	Monthly Transaction Summary (PRA)	
Accounts Receivable			
How much is owed to my practice?	Accounting Date	Total Aged Accounts Receivable by Financial Class (AR) ☺	Can be sub-divided in other ways and provides identical overall totals.
Which responsible parties owe me more than \$50 that's over 90 days old?	Accounting Date	Responsible Party AR (AR)	
Which claims are over 60 days old?	Submission Date	Outstanding Claims Review (OCR)	Can be run for individual payers and sorted based on column headers.
How many claims do I have over 180 days old from different payers?	Submission Date	Outstanding Claims Review (OCR)	Select the report format "Outstanding Clams – Summary" click Print or Preview
Which accounts have unapplied amounts?	Accounting Date	Unapplied Payment Listing (PRAR)	Don't filter Payment Entry dates

Which accounts have credit balances?	Accounting Date	Credit Balance Listing (PRAR)	Don't filter Payment Entry dates
What report can I provide my accountant to reconcile transactions from one AR date to another?	Accounting Date	Transaction Summary (PRA)	Use "Charge Transaction Total" and "Total Payments and Adjustments"
Insurance Companies			
Which payers do I bill the most?	Accounting Dates	Charges Summarized by Primary Insurance (CRAR)	
Which payers paid me the most last year?	Accounting Dates	Payments Summarized by Insurance Co. (PRAR)	Don't filter Payment Entry dates
Who is paying me the most for a specific procedure?	Dates of Service	Reimbursement Analysis by Payer (PAR)	Run this first on a limited number of procedures.
How long is it taking everyone to pay me?	Accounting Dates	Timing of Receipts by Primary Insurance Company (CRAR) ☺	
Appointments			
Who are we scheduled to see tomorrow?	Appointment Dates	Appointment Listing (ALA), Appointment Day Sheet (ADS) or Print any appointment view	
How many cancellations and no-shows did we have last month?	Appointment Dates	Statistical Summary of Appointments (ALA)	Many other appointment stats as well.
Referrals			
Which doctors are referring the most business to me?	Accounting Dates	Charges Summarized by Referring Doctor (CRAR) or Charge / Patient Analysis (CRAR)	
Patients			
How many patients do I have with a particular type of coverage?	Accounting Dates	Charge / Patient Analysis by Financial Classification (CRAR)	Options exist for other categorization as well.
Overall			
What are the charge per month and collections per month trends like over the last year?	Accounting Dates	Monthly Summary Report (PRA)	
Over the last few months, what kind of patients have we seen, how much have we been paid by them and how many new patients were there?	Accounting Dates	Revenue Analysis by Financial Classification ☺	Options exist to break this same information down by provider, charge classification, facility or insurance

☺ The presence of this icon indicates that due to the complexity of calculations necessary for a particular report, extra processing time will likely be necessary. Reports so indicated are likely to take several times longer to run than other reports with the length of time directly related to how much data is in the system.